Bibliographic Software: A Beginner's Guide

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What Is Bibliographic Software?

A side effect of living in the information age is an almost universal sense of being up to one's neck in important sources. Whether you're preparing your dissertation, keeping up with the journal literature in your field, or simply trying to keep track of web sites and the articles you've read, you're likely to experience growing frustration as you confront the task of keeping all those sources organized in some way.

Bibliographic citation management software can be extremely useful in this task. There are several popular software packages available. EndNote, ProCite, and Reference Manager are all widely used, among others. None of these products is supported at MIT, which simply means that the Computing Help Desk won't necessarily be able to answer your questions if you have technical problems. However, most people find that the customer support offered by the publishers, coupled with information shared over listservs, is quite adequate. (BibTeX is the only bibliographic software fully supported at MIT; it is available on Athena, and works in conjunction with the LaTeX text formatter. More information is available from Athena's On-Line Help at http://web.mit.edu/olh/ or from the Athena Consulting Stock Answers at http://web.mit.edu/answers/latex/index.html.

What Does This Software Do?

The current releases of the most popular citation management software do three basic tasks. First, of course, they help you organize your references. Using this software, you can collect and manage groups of citations; set up groupings by topic; sort your references; select the ones to cite in a particular article; and so on. Naturally, you could do all this using a standard database program like Access or FileMaker Pro, but citation management software is already structured to accommodate the specific fields associated with bibliographic information.

Next, this software will create your bibliography and footnotes. All these packages allow you to select from hundreds of standard styles (for example, APA, Turabian, Chicago, and so on.) In addition, these packages are compatible with Word and all other standard word processing programs. This means that you can store the basic information within your citation manager, and then set up the references in your document, using whatever style format you choose. No more frantic searching through the style manual to make sure your footnotes are correctly done – the software does all that for you.

Finally, most of the popular citation managers include their own search engines. These search engines allow you to connect to certain databases, do your search, store your citations, and format your bibliography, all within one interface. It sounds great – but there can be some hidden disadvantages.

The biggest disadvantage is that the databases you need may not be accessible in this manner. The search engines built into bibliographic software use a search protocol called Z39.50; they can only connect if there is a Z39.50 server at the other end. Not all databases have one. Further, most of the scholarly databases that do have Z39.50 servers require passwords. (The databases listed on our web site, http://libraries.mit.edu/vera/ , use a variety of other methods to authenticate you.)

In addition, the quality of the search may not be the best. Z39.50 searching has sometimes been characterized as "one size fits all" searching. Depending upon how much care and attention went into designing the file that connects you to any given database, you may end up missing quite a lot of information and never even know it. In general, for the most precise search results, we recommend doing your search within a database's native interface and then importing your results to your citation manager. This is especially the case if you are trying to do any kind of subject search or a search requiring use of Boolean operators.

So Which One Should I Buy?

Although students are given a nicely discounted price on most of these programs, they still represent an investment, so do some homework before selecting one. ProCite, EndNote, and Reference Manager, the most popular citation managers, are all excellent and you really can't go wrong with any of them; to see which interface feels the most comfortable for you, you may wish to download trial versions (http://www.isiresearchsoft.com/). If one of these packages is more widely used in your department or among your friends, you might want to pick that one. At the very least there will be people around to help you get started, and hopefully you'll be able to share files with your colleagues with ease.

Otherwise, there are several comparisons available on the web. Peter Evans's article "Personal Bibliographic Managers," which appeared in the *Biblio Tech Review* (http://www.biblio-tech.com/html/pbms.html) gives an excellent overview but is out of date (4/98.) Similarly, UC Berkeley's Chorus site (http://www-writing.berkeley.edu/chorus/eresearch/index.html) has great reviews but be sure to check dates. "Bibliography Formatting Software: An Evaluation Template" by Francisco Dell'Orso (http://www.burioni.it/forum/ors-bfs.htm) is not for the faint of heart, but it gives an incredible amount of detailed information, and is regularly updated. "Evaluation of Reference Management Software on NT" by Maggie Shapland (http://www.cse.bris.ac.uk/~ccmjs/rmeval99.htm) is another excellent resource; although the technical information makes reference to the NT operating system, the evaluations of the software would be relevant to any platform.

What Support Do the Libraries Offer?

While the Libraries offer no formal support to users of any citation software, we do our best to answer questions regarding these products. In recent years we have had more questions regarding EndNote than any other package, with the result that we presently offer basic services to its MIT users. These services include posting connection files, filters, and some help at http://libraries.mit.edu/help/endnote/ ; sharing information by way of a mail group, endnote@mit.edu; and occasionally sponsoring training sessions. Should demand warrant and staff time permit it, we would be willing to provide similar services to users of other citation management software.