Citation Management Tools Comparison: Organizing and Collaborating

Zotero, Mendeley, RefWorks (New and Legacy versions), and EndNote (Desktop and Web versions) are common citation management tools among UBC graduate students and faculty members, from a survey in 2011. These citation management tools all provide four basic functions: capturing, organizing, citing, and sharing references. The major differences between these tools are in organizing and sharing (collaboration) features, which we compare in Table 1 and Table 2, respectively.

Table 1. Organizing features in citation management tools

	Zotero	Mendeley	New RefWorks	Legacy RefWorks	Endnote Desktop	EndNote Web
Price	Free (costs for upgraded storage)	Free (costs for upgraded storage & private groups)	Free for UBC students, faculty, staff, and alumni ($100 otherwise)	Free for UBC students, faculty, staff, and alumni	$250 ($150 student version)	Free for UBC students through Clarivate Analytics (Web of Science)
Free space	300 MB (2 GB ~$1.67/month)	2 GB ($4.99 /month ~ 5 GB)	Unlimited	Unlimited	Unlimited	50,000 references + 2 GB of documents
PDF annotation and reader	Yes, with 3rd party plug-ins	Yes	Yes	No	Yes	No
Snapshot[1]	Yes	No	No	No	Yes	No
Retrieve PDF citation data	Yes	Yes	Yes	No	Yes	No
Full text PDF search	Yes (activate in settings)	Yes	No	Yes	Yes	No
Integration with Word Processors	MSWord plug-in OpenOffice plug-in Google Docs drag & drop	MSWord plug-in Libre Office plug-in Google Docs drag & drop	MSWord plug-in	MSWord plug-in	MSWord plug-in	MSWord plug-in

1) **Snapshot:** When capturing the citation for a webpage online, the tool can automatically take a screencapture of the full webpage for future reference.

Table 2. Collaboration features in citation management tools

	Zotero	Mendeley	New RefWorks	Legacy RefWorks	EndNote Desktop	EndNote Web
Personal profile[1]	Yes	Yes	No	No	Yes	Yes
Private group[2]	Unlimited	Yes (5 private groups with up to 25 collaborators and 100MB storage on free account)	Yes	Yes	Yes	Yes
Public group[3]	Unlimited	Unlimited	Yes (within UBC)	Yes	Yes	No
Annotate shared references[4]	Yes	Yes (in private group)	Yes	No	Yes	Yes
Followers [5]	Yes	Yes	No	No	No	No
Collaboration newsfeed[6]	Yes	Yes	No	No	Yes	No
Group page and discussion forum[7]	Yes	Yes	No	No	No	No
Mobile	mobile-optimized site; 3rd party apps for Android & iPhone	Android and iOS apps	mobile-optimized site	No	mobile-optimized site; iPad app	mobile-optimized site

1) **Personal Profile:** In your profile, you can write about your academic background, publications, and your research interests. You can also search and see others' profiles and add them to your contact list or send them a message.
2) **Private group:** This feature lets you share your references with specific people such as your supervisor and colleagues. The references in a private group are not publicly accessible.
3) **Public group:** This feature lets you share your references with the public.
4) **Annotate shared references:** This feature allows group members to annotate shared references if permissions are set to allow edit access.

5) **Followers:** You can follow other researchers and be followed by others to see each other's posts and updates.
6) **Collaboration newsfeed:** If you are a member of a public or private group and you want to be informed of any updates in those groups by email or embedded message, newsfeed feature would be the answer for you.
7) **Group page and discussion forum:** This feature provides an independent webpage and forum for a group where people can discuss and have conversations in the form of posted messages.