

## Reference Management Software Comparison - 5th Update (June 2015)

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Citavi  
Docear  
Mendeley  
Zotero  
RefWorks  
EndNote  
Colwiz  
JabRef



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## Reference Management Software Comparison

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All information for this software comparison is compiled after comprehensive software testing. However, due to the complexity and continuing development of applications we can not assume any guarantee for the accuracy of the information. If you detect any errors or omissions please contact us at [literaturverwaltung@ub.tum.de](mailto:literaturverwaltung@ub.tum.de).

## **Key questions to select the right reference management software**

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Answers to many of the following questions can be found in this software comparison document. However, some question will be answered only by testing the programme yourself.

### **Ease of Use / Usability**

- > Do I like the interface? Is it intuitive to me?
- > Do I easily find the functions I'm looking for?

### **Operating system**

- > Which software can I use with my operating system (Linux, Mac, Windows)?
- > Which software offers an online version?
- > Which software offers a mobile version/app?

### **Help**

- > Are there any training courses for beginners?
- > Are there any materials for self training (e.g. videos, manuals)?
- > Is there any support if I need help (library, company, IT hotline, forums etc.)?

### **Compatibility**

- > What external programmes should my reference management software support (e.g. word processor)

### **Costs**

- > Does the software cost anything?
- > Is there a campus licence at my institution (university/company)?
- > Are there potentially additional costs (e.g. after leaving institution, need for more storage space)?

### **What features should my reference management software offer?**

- > Catalogue and database search from within the programme?
- > Indexing and structuring of content?
- > Searching for full text?
- > PDF editing?
- > Generating bibliographies?
- > Managing quotes / ideas?
- > Online access?
- > Sharing and/or jointly editing references?
- > Task planning?
- > LaTeX support?

### **Where do I usually work?**

- > Do I use always the same computer or do I switch sometimes?
- > Do I have permission to install software on the computer I use?
- > What reference management software do my colleagues/collaborators use?

General

	Provider / URL	Tested Version	Licence Model	Cost (approx.) Might differ in different countries due to taxation	Language
			<i>Open Source, freeware or commercial? Single user or multi user licence?</i>		
<b>Citavi</b>	Swiss Academic Software, <a href="http://www.citavi.com/">http://www.citavi.com/</a>	5.0.0.11 Citavi for Windows	<ul style="list-style-type: none"> <li>&gt; Commercial</li> <li>&gt; Free version "Citavi Free", limited to 100 references per project</li> <li>&gt; Citavi for Windows (single users and small groups)</li> <li>&gt; Citavi for DBServer (large groups and businesses)</li> <li>&gt; Single user licences; student licences; site licences</li> </ul>	<ul style="list-style-type: none"> <li>Single user licences (discount for more than 4 licences)</li> <li>&gt; Commercial users from € 356 incl. VAT</li> <li>&gt; Academic institutions € 237 incl. VAT</li> <li>&gt; Students / Personal use € 119 incl. VAT</li> </ul>	English, German, French, Italian, Spanish, Portuguese, Polish
<b>Colwiz</b>	Colwiz PVT. Ltd. Oxford University Start-Up <a href="http://www.colwiz.com">http://www.colwiz.com</a>	3.15.0610	<ul style="list-style-type: none"> <li>&gt; Free web service + desktop version</li> </ul>		English
<b>Docear</b>	Different developers, funded by BMWI <a href="http://www.docear.org">http://www.docear.org</a>	1,1	<ul style="list-style-type: none"> <li>&gt; Free</li> <li>&gt; GPL 2 and BSD Licence</li> </ul>	--	English, German, French, Dutch ...
<b>EndNote</b>	Thomson Reuters, <a href="http://www.endnote.com">http://www.endnote.com</a>	X7.3.1	<ul style="list-style-type: none"> <li>&gt; Commercial</li> <li>&gt; Single user licences; Multiple User licences (5 users); Student licences; Campus licences; Business licences; Crossgrades (from Reference Manager to EndNote); Research &amp; Teaching licences</li> <li>&gt; Free version "EndNote Basic" with limited functionality and limited storage space (50,000 references, 20 citation styles, 2 GB storage space, 6 databases)</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Single user licence from € 210 excl. VAT</li> <li>&gt; Students from € 95 excl. VAT</li> <li>&gt; Multiple User licence (5 users) € 170 p.P. excl. VAT</li> <li>&gt; Crossgrades (single user) from € 85 excl. VAT</li> </ul>	English
<b>JabRef</b>	Different developers <a href="http://jabref.sourceforge.net/">http://jabref.sourceforge.net/</a>	2.10	Free web service (with Java Web Start) + open source software (General Public Licence)	--	English, German, French, Italian, Spanish, Chinese ...
<b>Mendeley</b>	Mendeley Ltd. <a href="http://www.mendeley.com">http://www.mendeley.com</a>	1.13 (Desktop)	<ul style="list-style-type: none"> <li>&gt; Free web service (up to 2 GB) + desktop version</li> <li>&gt; Personal Storage (Plus / Pro / Max) + Team Plans: more storage + more private groups = higher cost</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Personal: from 5 GB for € 4,99/month to unlimited storage for € 14,99/month, one private group</li> <li>&gt; Team Plans: unlimited private groups and storage; from 5 collaborators for € 49/month to 50 collaborators for € 274/month; for education and non-profit use (double charge for commercial and government use)</li> </ul>	English
<b>RefWorks</b>	RefWorks, <a href="http://www.refworks-cos.com/refworks/">http://www.refworks-cos.com/refworks/</a>	2.0	<ul style="list-style-type: none"> <li>&gt; Commercial</li> <li>&gt; Single user licences and campus licences</li> <li>&gt; 30 days trial version</li> </ul>	Single user licence \$ 100/year	English, German, French, Italian, Spanish, Korean ...
<b>Zotero</b>	Center for History and New Media at George Mason University, <a href="http://www.zotero.org/">http://www.zotero.org/</a>	4.0.26.4	Free web service (up to 300 MB) and Open-Source Software (desktop version and Firefox extension)	<ul style="list-style-type: none"> <li>&gt; 2 GB for \$ 20/year</li> <li>&gt; 6 GB for \$ 60/year</li> <li>&gt; unlimited for \$ 120/year</li> </ul>	Language setting in Firefox (Firefox extension) or of operating system (Standalone version)

## Technical Specifications

	Installation	Platform / Operating System	Mobile App	Character Encoding	Max. Number of References	Max. Online Storage Space
	<i>Desktop / Web based</i>			<i>Unicode / Special characters</i>		
<b>Citavi</b>	> Desktop	- > Windows > Use on Mac only through simulations of Windows environment	- no	Unicode support	+ Unlimited (Recommendation: max. 20,000 references per project)	--
<b>Colwiz</b>	> Desktop > Web based	+ > Desktop: Windows, Mac, Linux > Web: platform independent > Java and Adobe AIR required	+ App for Android and iOS	Unicode support	- > 5,000	> max. 3 GB (depending on completion of profile, invitation from colleagues, Facebook linking etc.)
<b>Docear</b>	> Desktop	+ > Desktop: Windows, Mac, Linux > Java required	- no	Unicode support	+ Unlimited	--
<b>EndNote</b>	> Desktop > Web based	+ > Desktop: Windows, Mac > Web: platform independent	+ > EndNote for iPad > Synchronisation with EndNote Web > EndNote Web Mobile (Browser version for mobile devices)	Unicode support	+ > Desktop version: unlimited > Web version: unlimited > EndNote Basic: 50,000 references	> Web: 5 GB > Basic: 2 GB
<b>JabRef</b>	> Desktop > Web based	+ > Desktop: Windows, Mac, Linux > Web: platform independent > Java required	- For tablets with Windows 8	Unicode support	+ Unlimited	--
<b>Mendeley</b>	> Desktop > Web based	+ > Desktop: Windows, Mac, Linux > Web: platform independent	+ > Mendeley for iPhone / iPod Touch / iPad (limited functionality) > Synchronisation with Web Account	Unicode support	+ Unlimited	Free version 2 GB
<b>RefWorks</b>	> Web based	+ > Web: platform independent	+ RefMobile (pared-down RefWorks version)	Unicode support	+ Unlimited	Depending on institutional licence (usually 10 GB)
<b>Zotero</b>	> Firefox Extension > Standalone Version > Web based	+ > Firefox Extension > Web: platform independent > Standalone Version: Windows, Mac, Linux	+ > Mobile version of zotero.org > Third party apps, e.g. Zandy, ZotPad	Unicode support	+ Unlimited	> Free version 300 MB "file storage" (PDFs etc.) > Unlimited for "data syncing" (references)

## Import I

	Database Search		Data Import	
	<i>Is database search from within the software supported?</i>	<i>What resources are available?</i>	<i>Is data import via import filter supported?</i>	<i>Which import filters are available? (bibliographic databases and other reference management software)</i>
<b>Citavi</b>	+ Yes	> Access to over 4,700 resources > Access to additional resources can be requested	+ Yes	> 15 reference management software (LiteRat, EndNote, Bibliographix, ProCite etc.) > RIS, BibTeX > approx. 4,700 database specific filters > Editable import for tables or databases > Additional filters can be requested
<b>Colwiz</b>	+ Yes	> 30 resources	+ Yes	> Reference management software (Zotero, Mendeley, CiteULike) > RIS, BibTeX
<b>Docear</b>	- No		- No	
<b>EndNote</b>	+ Yes	> Access to over 5,000 resources > Access to additional resources can be requested or downloaded from EndNote website	+ Yes	> RIS, Tab Delimited > over 700 database specific filters
<b>JabRef</b>	+ Yes	Access to selected databases (e.g. JSTOR, IEEEExplore, Medline)	+ Yes	> BibTeX, RIS, Tab Delimited, EndNote etc. > Creation of personal import filters supported
<b>Mendeley</b>	- No	--	+ Yes	BibTeX, RIS, EndNote XML, Zotero
<b>RefWorks</b>	+ Yes	> Access to over 800 resources > Access to additional resources can be requested or added by administrator	+ Yes	> Bibliographix, EndNote > RIS, BibTeX, MAB, MARC > 1,000 database specific filters > Additional filters can be requested
<b>Zotero</b>	- No	--	+ Yes	RIS, BibTeX, MODS, RDF, Refer / BibIX etc.

## Import II

	Export from Databases		Capturing Metadata from Web Pages	Other Import Options	Full Text Search
	<i>Is direct export from databases into software supported?</i>	<i>From which databases?</i>			<i>Is full text search supported?</i>
<b>Citavi</b>	+ Yes	Databases with specific export format (e.g. RIS, BibTeX, EndNote); or COinS format	+ > With Citavi Picker (for Firefox, Internet Explorer, Chrome): Import of metadata or content from websites > Using ISBN or DOI with Citavi Picker > Capturing of selected text as quote, abstract, table of contents or keyword	+ > Import of bibliographic data by submitting ISBN, DOI or PubMed-ID > Import from bibliographies > Import from PDFs with Acrobat Picker > PDF documents via Drag & Drop > Import of folders with sub-folders	+ Yes
<b>Colwiz</b>	+ Yes	Databases with specific export format (e.g. RIS, BibTeX)	+ > With Web Importer (bookmarklet)	+ > Import of bibliographic data by submitting ISBN, DOI, PubMed-ID or ArXiv ID > Import of folders with sub-folders	+ Yes (beta version)
<b>Docear</b>	+ Yes	All databases with export option in BibTeX format	- No	+ Import by combining PDF metadata and Google Scholar search	- No
<b>EndNote</b>	+ Yes	Direct export supported, see: <a href="http://endnote.com/en/online-databases">http://endnote.com/en/online-databases</a> + others	+ > With Capture-Button: Import of metadata from websites > Bookmarklet / Firefox extension	+ > Files per Drag & Drop > Folder with sub-folder (keeping folder structure) > Auto import of new documents from auto import folder	+ Yes, via OpenURL
<b>JabRef</b>	+ Yes	All databases with export option in BibTeX format	- No	+ Import of bibliographic data by submitting DOI. ISBN-to-BibTeX feature deactivated since June 2015	- No
<b>Mendeley</b>	+ Yes	Databases with specific export format (e.g. RIS, BibTeX)	+ > With Web Importer (bookmarklet) > Capturing of website screenshots	+ > Files and folders per Drag & Drop > Auto import of new documents from "watched folder" > Import of bibliographic data by submitting PubMed ID, ArXiv ID or DOI	+ Yes, but only from Mendeley's Research Catalog, not in Desktop version
<b>RefWorks</b>	+ Yes	Direct export supported, see: <a href="http://www.refworks-cos.com/refworks/DEPartners/">http://www.refworks-cos.com/refworks/DEPartners/</a>	+ With RefGrab-It (completion of metadata)	+ With subscription to RSS feeds	- No
<b>Zotero</b>	+ Yes	Databases with specific export format (e.g. RIS, BibTeX)	+ > Icons in URL bar; see <a href="http://www.zotero.org/translators/">http://www.zotero.org/translators/</a> > Capturing screenshot of websites > Bookmarklet for other browsers (Safari, Chrome)	+ > Files per Drag & Drop > Import of bibliographic data by submitting ISBN, DOI or PubMed ID	+ Yes, via Google Scholar, CrossRef and OpenURL (other search services can be added; full texts not automatically added)

## Data Format

	Document Types			Fields	
	<i>Which document types (book, book chapter etc.) are supported?</i>		<i>Are user generated document types supported?</i>	<i>How many fields are assigned to each document type?</i>	<i>Are user generated fields supported?</i>
<b>Citavi</b>	35 document types	-	No	Depends on document type (16-50 fields)	+ 9 fields document specific customisable
<b>Colwiz</b>	15 document types	-	No	Depends on document type (at least 13 fields)	- No
<b>Docear</b>	19 document types	-	No	Depends on document type; ca. 37 fields	- No
<b>EndNote</b>	51 document types	+	Yes (Modification of available document types / customisation of three "unused" document types)	Depends on document type (20-60 fields, incl. "Custom Fields")	+ 8 "Custom Fields" customisable
<b>JabRef</b>	19 document types	+	Yes (Modification of available document types and creation of new document types)	Depends on document type; ca. 37 fields	+ Unlimited number of fields globally or document specific customisable
<b>Mendeley</b>	20 document types	-	No	Depends on document type; up to 66 fields	- No
<b>RefWorks</b>	31 document types	-	No	Depends on document type; up to 71 fields	+ 15 free text fields customisable
<b>Zotero</b>	33 document types	-	No	Depends on document type; ca. 25 fields	- No



## Editing I

	<b>Indices</b>		<b>Completion of Metadata</b>	<b>Interconnections</b>
	<i>Do newly added data (authors, journal titles, keywords) automatically generate term lists / indices?</i>		<i>Is completion of metadata by using other sources supported?</i>	<i>Is interconnection of references supported (e.g. new editions, translations)?</i>
<b>Citavi</b>	+ Yes (keywords, categories, authors, institutions, place published, publishers, journal and newspaper titles, series, libraries)	+ Yes	+ Input of ISBN, DOI or PubMed-ID completes bibliographic data and adds book cover	+ > Edited book and its chapters are linked > Two-way referrals between references within a project are supported
<b>Colwiz</b>	- Yes, only for keywords	- No	+ > Input of DOI, PubMed-ID or ArXiv ID completes bibliographic data > Completion of metadata from PDFs	- No
<b>Docear</b>	+ Yes (customisable)	+ Yes	- No	+ Yes, via the field "Crossref" by using the BibTeX-Key of the parent publication
<b>EndNote</b>	+ Yes (authors, keywords, journal titles); users can create new term lists; pre-defined journal term list available	+ Yes	+ Completion of metadata with function "Find Reference Updates"	- No
<b>JabRef</b>	+ Yes (customisable)	+ Yes	+ > Input of DOI completes bibliographical data > Per URL of database Citeseer (if already known) > Completion of metadata from PDFs	+ Yes, via the field "Crossref" by using the BibTeX-Key of the parent publication
<b>Mendeley</b>	+ Yes (authors, keywords, journal titles, tags)	+ Yes	+ > Automatic completion of metadata from PDFs > "Needs Review" search in Google Scholar	- No
<b>RefWorks</b>	+ Yes (authors, keywords, journal titles)	+ Yes	+ Via RefGrab-It	- No
<b>Zotero</b>	+ Yes (authors, keywords, place published, publisher, journal titles, tags)	+ Yes	+ Completion of metadata from PDFs (manually with right click)	+ Yes, by using the function "Related"

## Editing II

	Linking / Integration of Documents	Editing Documents (PDFs)	Duplicate Checking	Global Changes	Folders / Groups
	<i>Is linking / integration of documents supported?</i>				<i>Is creation and allocation of folders/groups supported?</i>
<b>Citavi</b>	+ Yes	> Commenting and highlighting in PDFs supported > Copying of text blocks as citations to knowledge management area; > Import of images as image citation	+ Yes	+ Yes	+ Yes (categories and groups; within categories multiple levels and multiple allocations possible)
<b>Colwiz</b>	+ Yes, only in desktop version	+ Annotations and highlighting text supported	+ Yes, automatically	- No	+ Yes (multiple levels; automatic allocations and multiple allocations possible)
<b>Docear</b>	- No, only relative links supported	- Only with external editor; then import of comments and highlighting into Mindmaps	- At import of Bib TeX entries	+ Yes	+ Yes (multiple levels; automatic allocations and multiple allocations possible)
<b>EndNote</b>	+ Yes, (absolute links and relative links to copy in project)	+ Annotations and highlighting text supported	+ Yes (also customisable)	+ Yes	+ Yes (groups; one level; automatic allocations and multiple allocations possible)
<b>JabRef</b>	- No, only relative links supported	- No	+ Yes	+ Yes	+ Yes (multiple levels; automatic allocations and multiple allocations possible)
<b>Mendeley</b>	+ Yes	+ Annotations and highlighting text supported	+ Yes	+ Yes	+ Yes (folders; multiple levels; multiple allocations possible)
<b>RefWorks</b>	+ Yes	- No	+ Yes ("exact" and "close" duplicates)	+ Yes	+ Yes (folders; multiple levels; multiple allocations possible)
<b>Zotero</b>	+ Yes	- No, only with external editors	+ Yes	- Only for tags	+ Yes (folders; multiple levels; automatic allocations and multiple allocations possible)

## View / Search

	<b>Viewing</b>	<b>Sorting</b>	<b>Searching</b>		
	<i>What options to view references are available? (short view / full view / customisable)</i>	<i>What options to sort references are available?</i>	<i>Is quick search and search in selected field with Boolean operators supported?</i>	<i>Search performance?</i>	<i>Can searches be saved?</i>
<b>Citavi</b>	> Tab view (tabs customisable) > List view (formatted) > Table view (displayed fields customisable)	+ Click on field headers or separate sort function by title, year, location or customised	+ > Quick search > Search in selected fields (both with Boolean operators)	+ Good	+ Yes: in catalogues / databases and in own project
<b>Colwiz</b>	> List view > Table view	+ Click on field headers or separate sort function	- > Quick search	- Prone to errors	- Yes, but only within session
<b>Docear</b>	> Short view > Full view	+ Click on field headers, also sorting by multiple criteria	+ > Quick search > Advanced search (Boolean operators and general terms can be used)	+ Good	+ Yes (as dynamic group)
<b>EndNote</b>	> List view (customisable) > Preview > Full view	+ Click on field headers or separate sort function	+ > Quick search > Advanced search with Boolean operators > Search in attached PDFs and commentaries	+ Good	+ Yes
<b>JabRef</b>	> Short view > Full view	+ Click on category, also sorting by multiple criteria	+ > Quick search > Advanced search (Boolean operators and general terms can be used) > Global search within all open databases	+ Good	+ Yes (as dynamic group)
<b>Mendeley</b>	> List view > Citation view (in desktop version)	+ Click on field headers (in desktop version)	+ > Quick search by author, title, publication, year, notes (with Boolean operators) > Search in attached PDFs	+ Good	- No
<b>RefWorks</b>	> List view > Full view > Short view	+ Pulldown menu	+ > Quick search > Search by using controlled vocabulary > Field search	+ Good	+ Yes
<b>Zotero</b>	> List view (customisable) > Timeline view - visualisation with timeline and colour tagging by topic	+ Click on field headers	+ > Quick search > Advanced search > Tag search > Search in attached PDFs	+ Good	+ Yes

## Collaboration

	Sharing	Collaboration	Social Networking
	<i>Can reference be shared (read only) with other users?</i>	<i>Can multiple users edit references?</i>	
<b>Citavi</b>	+ Yes, via email (also PDFs)	+ > Yes (max. three simultaneous users, only on same drive) > for larger groups via Citavi for DBServer	- No
<b>Colwiz</b>	+ > Yes, via email > Sharing of groups and papers in online version (Drive)	+ Yes, in shared groups	+ > Communication in interest groups > Sharing of own publications > Creating of own researcher profile > People search > Discussion stream
<b>Docear</b>	- No	+ Yes; warnings and confirmations when changing BibTeX file with references	- No
<b>EndNote</b>	+ Yes, via email (also PDFs)	+ > Yes, in shared folder in EndNote Web or Share-Library feature in EndNote desktop > Share folder: multiple users have reading and editing permission (only references, not full texts) > Share-Library feature: Users have permission for whole library	- No
<b>JabRef</b>	- No	+ Yes; warnings and confirmations when changing BibTeX file with references	- No
<b>Mendeley</b>	+ > Sharing of groups and papers in online version > Yes, via email	+ Yes, in shared groups	+ > Communication in interest groups > Sharing of own publications > Creating of own researcher profile > People search
<b>RefWorks</b>	+ Yes, via "RefShare" (only with campus licence)	+ Yes in "RefShare" (only with campus licence)	- No
<b>Zotero</b>	+ > Sharing of groups and papers in online version > Sharing of own library in online version	+ Yes, in shared groups	+ > Communication in interest groups > Creating of own researcher profile > People search

## Citing

	Citation Styles		Generating Bibliographies (static)		Word Processor Integration	Generating Bibliographies (dynamic)
	<i>What citation styles are available? Are common styles such as MLA, APA, Harvard available?</i>	<i>Are citation styles editable?</i>	<i>Is export of single (formatted) references supported?</i>	<i>Can bibliographies be generated and exported as text file?</i>	<i>Is export of references into word processors supported?</i>	<i>Automatic update of bibliography when adding new reference?</i>
<b>Citavi</b>	+ > More than 3,900 citation styles > New citation styles can be requested from provider ( <a href="http://www.citavi.com/stylerequest">http://www.citavi.com/stylerequest</a> )	+ Yes	+ Yes	+ Yes	+ > Yes > Word Add-In > "Publication assistant" for OpenOffice, LibreOffice and 8 TeX editors	+ > Word Add-In: Yes, automatic update > LibreOffice / OpenOffice: No, bibliography is being created and added by formatting of text document > LaTeX: bibliography is being updated at next BibTeX/LaTeX run
<b>Colwiz</b>	+ More than 7,500 citation styles can be added (incl. user generated styles), see: <a href="http://www.citationstyles.org">http://www.citationstyles.org</a>	+ Yes (with Citation Style Editor: <a href="http://editor.citationstyles.org">editor.citationstyles.org</a> )	+ Yes, with BibTeX	+ Yes, with BibTeX	+ Yes, (with Plug-Ins for Word, OpenOffice, LibreOffice and NeoOffice; automatic LaTeX export)	+ Yes
<b>Docear</b>	> Formatting and citation styles with BibTeX > 19 default styles with Word Add-In, another 7,000 styles can be added	see BibTeX	see BibTeX	> see BibTeX > Word Add-In: Yes	+ Yes (Support for some LaTeX editors and Word Add-In)	+ > Updating of bibliography after next BibTeX / LaTeX run > Automatic update in Word
<b>EndNote</b>	+ More than 6,000 citation styles installed	+ Yes	+ Yes	+ Yes, (with export function and "Subject Bibliography")	+ Yes ("Cite While You Write") (Word, Apple Pages, OpenOffice Writer)	+ Automatic update
<b>JabRef</b>	Formatting and citation styles with BibTeX	see BibTeX	see BibTeX	see BibTeX	+ > Yes (Support for some LaTeX editors and external plugin for Word > JabRef 32bit version supports LibreOffice	+ > Updating of bibliography after next BibTeX / LaTeX run > Automatic update in LibreOffice
<b>Mendeley</b>	+ > 12 citation styles with installation > More than 7,500 styles can be added (incl. user generated and modified styles), see: <a href="http://www.citationstyles.org">http://www.citationstyles.org</a>	+ Yes (with Citation Style Editor: <a href="http://editor.citationstyles.org">editor.citationstyles.org</a> )	+ Yes	- No	+ Yes (with Plug-In for Word and OpenOffice)	+ Automatic update
<b>RefWorks</b>	+ > More than 1,600 citation styles > New citation styles can be requested	+ Yes (can also be shared with other RefWorks users)	+ Yes	+ Yes	+ Yes (WriteNCite for Word + Word for Mac; online and offline version); for other word processors: One Line / Cite View	+ Automatic update
<b>Zotero</b>	+ > 16 citation styles with installation > More than 7,000 styles can be added (incl. user generated and modified styles), see: <a href="http://www.zotero.org/styles">http://www.zotero.org/styles</a>	+ Yes (with Citation Style Editor: <a href="http://editor.citationstyles.org/">editor.citationstyles.org/</a> )	+ Yes	+ Yes	+ Yes (Word Plug-In; OpenOffice / LibreOffice extensions)	+ Automatic update

Miscellaneous

	<b>Export</b>	<b>Other Features</b>	<b>Remarks</b>
	<i>Is export of references in specific file format supported?</i>		
<b>Citavi</b>	+ Yes (BibTeX, EndNote, RIS); Exports as MS Access file; Export in table formats (.xls, .odt)	+ Knowledge management: > Adding of personal thoughts / ideas > Categorising of references, quotes and thoughts > Creating of hierarchy within categories > Using Citavi Picker to copy Adobe Acrobat-Reader / Word texts into documents > Task planner (organising of tasks, deadlines etc.) > Auto generation of BibTeX key > Citation Style Finder (supports search for styles also after formatting of single elements in reference) > Automatic renaming of PDFs at import > Automatic back-up of Citavi files when quitting project > Import/ export of categories as mindmap > RSS reader	> Installation from USB key possible > Online version planned (incl. Word add-in for Mac)
<b>Colwiz</b>	+ Yes (RIS, EndNote, BibTeX)	+ > Adding notes to references > Drive application for data sync and messages (Cloud) > Calendar in groups > Task planner > Statistics for own Library	> Data sync is often overloaded > Not clear if applications remains free (at the moment option to upgrade for more storage space by providing personal data)
<b>Docear</b>	+ Yes (RIS, EndNote, several HTML and table formats)	+ > Organising of notes, thoughts and quotes in Mindmaps > Recommender System for literature suggestions (registration required) > Import of PDF annotations into Mindmaps > Generating of hierarchy by exporting Mindmaps in different formats > Task planner with notes and reminders	> Reference management only part of software, focus on knowledge management > Knowledge management segment works also with other, external reference management software such as JabRef, Mendeley and Zotero
<b>EndNote</b>	+ Yes (BibTeX, RIS, Tab Delimited)	+ > "Manuscript Wizard": structuring of documents > Automatic renaming of PDFs at import > "Manuscript Matcher" in EndNote Web: suggesting journals for publication	> Support and training through Alfasoft > Integration into other Thomson Reuters products (ISI Web of Science, ResearcherID)
<b>JabRef</b>	+ Yes (BibTeX, RIS, EndNote, XML)	+ > Auto generation of BibTeX key > Export filter editor > 5-level ranking, 3-level prioritisation and relevance marking as well as quality marking > Batch processing of multiple datasets	> Creation and addition of plug-ins possible > Mobile version available
<b>Mendeley</b>	+ Yes (BibTeX, RIS, EndNote XML)	+ > Synchronisation of BibTeX file supported	Number of downloads is being used for Altmetrics services (altmetric.com, ImpactStory, etc.)
<b>RefWorks</b>	+ Yes (BibTeX, RIS, Tab Delimited, RefWorks Tagged, XML)	+ > Chapter structure reflected in folder structure	Campus licence: > Administrator area for institutional settings > Usage statistics > RSS feeds > Subscription based "RefAware Awareness Service" can be added; see <a href="http://www.refaware.com/">http://www.refaware.com/</a>
<b>Zotero</b>	+ Yes (BibTeX, RIS, MODS, RDF)	+ > Generating of reference independent notes > Colour tagging	> Many plug-ins available > Regular back-up recommended > RSS feeds

## Ease of Use

	Performance	Ease of Use	Help / Guides
	<i>Speed, response time</i>	<i>How intuitive is user interface?</i>	<i>What help / guides are available?</i>
<b>Citavi</b>	+ Good	+ Very good (very intuitive; individual steps and options are explained)	+ <ul style="list-style-type: none"> <li>&gt; Getting Started Guide</li> <li>&gt; Manual</li> <li>&gt; Manual for academic work</li> <li>&gt; Videos and slide shows</li> <li>&gt; Very good context sensitive help (customisable / editable)</li> <li>&gt; Forum</li> <li>&gt; Ticket system</li> <li>&gt; Chat</li> <li>&gt; Trainer network</li> </ul>
<b>Colwiz</b>	- Ok	+ Good, focus is on Mac users	+ <ul style="list-style-type: none"> <li>&gt; Online help pages</li> <li>&gt; "Getting Started Guide"</li> <li>&gt; Feedback forum</li> </ul>
<b>Docear</b>	Unstable for larger PDF collections	- Ease of use is medium, confusing; Word Add-In is intuitive	<ul style="list-style-type: none"> <li>&gt; Online manual and FAQ</li> <li>&gt; User forum</li> </ul>
<b>EndNote</b>	+ Good	- <ul style="list-style-type: none"> <li>&gt; Ease of use is medium - many functions rather "technical", need for explanation (e.g. input field, RIS export, syntax for citation style customisation)</li> <li>&gt; Two share options at different location in programme are confusing</li> </ul>	+ <ul style="list-style-type: none"> <li>&gt; Manual</li> <li>&gt; Manual for academic work</li> <li>&gt; Online training documents</li> <li>&gt; Online tutorials</li> <li>&gt; Mailinglist (only english); forum</li> <li>&gt; Phone support (Mo-Fr 9.00 - 13.00)</li> <li>&gt; E-Mail support</li> </ul>
<b>JabRef</b>	+ Good	+ Good (designed for LaTeX users)	<ul style="list-style-type: none"> <li>&gt; Online help pages and FAQ</li> <li>&gt; User forum</li> </ul>
<b>Mendeley</b>	+ Good	+ Good	+ <ul style="list-style-type: none"> <li>&gt; Online help pages</li> <li>&gt; "Getting Started Guide"</li> <li>&gt; Feedback forum</li> <li>&gt; Video tutorials</li> </ul>
<b>RefWorks</b>	+ Good	+ Good	+ <ul style="list-style-type: none"> <li>&gt; Manuals for beginners, advanced and experts</li> <li>&gt; Online help pages</li> <li>&gt; Tutorials, YouTube channel</li> <li>&gt; Email and phone support</li> <li>&gt; Online help</li> <li>&gt; Online training</li> </ul>
<b>Zotero</b>	+ Good	+ Good	<ul style="list-style-type: none"> <li>&gt; Video tutorials (e.g. Quick Start Guide)</li> <li>&gt; Help pages</li> <li>&gt; Forum with large community</li> </ul>

## Overview

	<b>Licence Model</b>		<b>Installation</b>		<b>Operating System</b>			<b>Mobile App</b>	<b>Database Search</b>	<b>Data Import</b>	<b>Export from Databases</b>	<b>Capturing of Metadata from Web Pages</b>	<b>Other Import Options</b>	<b>Completion of Metadata</b>	<b>Linking of References</b>	<b>Duplicate Checking</b>	<b>Folders and Groups</b>	<b>Sharing Privately or Publicly</b>	<b>Jointly Editing</b>	<b>Social Networking</b>	<b>Separate Bibliographies</b>	<b>Word Processor Intergration</b>	<b>Intuitive User Interface</b>
	Commercial	Free	Desktop	Web based	Windows	Mac OS	Linux																
<b>Citavi</b>	+	+	+	-	+	-	-	-	+	+	+	+	+	+	+	+	-	+	-	+	+	+	
<b>Colwiz</b>	-	+	+	+	+	+	+	+	+	-	+	+	+	+	-	-	+	+	+	+	+	+	
<b>Docear</b>	-	+	+	-	+	+	+	+	-	-	+	-	+	-	+	+	-	-	-	+	+	-	
<b>EndNote</b>	+	+	+	+	+	+	-	+	+	+	+	+	-	+	-	+	+	-	+	-	+	+	
<b>JabRef</b>	-	+	+	+	+	+	+	-	+	+	+	+	+	+	+	+	+	-	-	-	+	+	
<b>Mendeley</b>	-	+	+	+	+	+	+	+	-	+	+	+	+	+	-	+	+	+	+	+	+	+	
<b>RefWorks</b>	+	-	+	+	+	+	+	+	+	+	+	+	+	+	-	+	+	+	+	-	+	+	
<b>Zotero</b>	-	+	+	+	+	+	+	+	-	+	+	+	+	+	+	+	+	+	+	+	+	+	



## Final Evaluation

<b>Criteria for Evaluation</b>	<ul style="list-style-type: none"> <li>&gt; Licence model and price</li> <li>&gt; Platform / Operating system</li> <li>&gt; Database search</li> <li>&gt; Import options</li> <li>&gt; Full text search</li> <li>&gt; Completion of metadata</li> <li>&gt; Attaching / integrating of documents</li> </ul> <p>Under "Strength" and "Weakness" we have listed features which stand out very positive or negative.</p>	<ul style="list-style-type: none"> <li>&gt; Sharing, jointly editing</li> <li>&gt; Social networking options</li> <li>&gt; Word processor integration</li> <li>&gt; Other features</li> <li>&gt; Ease of use</li> <li>&gt; Help, guides</li> </ul>
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Strength	Weakness	User Group
<i>For which user group is the software appropriate?</i>		
<b>Citavi</b> <ul style="list-style-type: none"> <li>+ Commercial and free version with full functionality (limited to 100 references per project)</li> <li>+ Full text search</li> <li>+ Comprehensive knowledge management and task planning</li> <li>+ Jointly editing in small teams using the same drive supported; for larger groups external server and Citavi DBServer</li> <li>+ Very intuitive interface</li> <li>+ Extensive help options and very good individual support</li> <li>+ Easy to use Word Add-In with useful functions</li> <li>+ Citation Style Finder</li> </ul>	<ul style="list-style-type: none"> <li>- Windows only (XP no longer supported)</li> <li>- No online version</li> <li>- Bibliography will be added after formatting</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Windows users</li> <li>&gt; Beginners to professionals</li> </ul>
<b>Colwiz</b> <ul style="list-style-type: none"> <li>+ Platform independent and free</li> <li>+ Many collaboration options: Calendar, drive, groups, profile</li> <li>+ Usability</li> <li>+ App for iOS and Android</li> <li>+ Synchronisation</li> <li>+ PDF reader with many editing tools</li> </ul>	<ul style="list-style-type: none"> <li>- Prone to errors (synchronisation)</li> <li>- References limited to 5,000</li> <li>- No OpenURL</li> <li>- Import of some data (txt, XML, etc.) could be problematic</li> <li>- Only Quick search within own library</li> </ul>	<ul style="list-style-type: none"> <li>&gt; All user groups, very intuitive</li> </ul>
<b>Docear</b> <ul style="list-style-type: none"> <li>+ Platform independent (Windows, Mac, Linux)</li> <li>+ Open Source, free</li> <li>+ Very good for excerpting and structuring of literature</li> <li>+ Good Word integration</li> </ul>	<ul style="list-style-type: none"> <li>- Relatively high learning curve</li> <li>- Reduced functionality in reference management compared to original JabRef</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Needs some experience with reference management software and some computer "savvyness" due to complexity of programm.</li> <li>&gt; Aimed at users who use PDF annotations</li> </ul>
<b>EndNote</b> <ul style="list-style-type: none"> <li>+ For Windows and Mac</li> <li>+ Web version free for subscribers to Web of Science and with purchase of desktop version</li> <li>+ Free web version EndNote Basic (limited functionality)</li> <li>+ Full text search</li> <li>+ Manuscript Matcher to search for appropriate journals for publication</li> <li>+ iPad app</li> <li>+ Automated import of PDFs supported</li> <li>+ Search in metadata, full text PDF and PDF comments supported</li> </ul>	<ul style="list-style-type: none"> <li>- Not very intuitive</li> <li>- Web version: documents can not be shared between members of a shared group (only references)</li> <li>- Full text sharing only via email</li> <li>- Confusing share options for groups and libraries with different sharing permissions</li> </ul>	<ul style="list-style-type: none"> <li>&gt; Windows and Mac users</li> <li>&gt; With some training for all user groups</li> </ul>

**Criteria for Evaluation**

- > Licence model and price
  - > Platform / Operating system
  - > Database search
  - > Import options
  - > Full text search
  - > Completion of metadata
  - > Attaching / integrating of documents
  - > Sharing, jointly editing
  - > Social networking options
  - > Word processor integration
  - > Other features
  - > Ease of use
  - > Help, guides
- Under "Strength" and "Weakness" we have listed features which stand out very positive or negative.

	Strength	Weakness	User Group
<b>JabRef</b>	<ul style="list-style-type: none"> <li>+ Desktop and web based version</li> <li>+ Platform independent (Windows, Mac, Linux)</li> <li>+ Good integration with several LaTeX editors</li> <li>+ Ranking, relevance and priority data</li> <li>+ Open Source, free</li> </ul>	<ul style="list-style-type: none"> <li>- No read-only or full sharing option</li> </ul>	
<b>Mendeley</b>	<ul style="list-style-type: none"> <li>+ Desktop and web based version</li> <li>+ Platform independent (Windows, Mac, Linux)</li> <li>+ Free (up to 2 GB storage)</li> <li>+ Collaboration in groups</li> <li>+ Social networking features</li> <li>+ One of the data sources for altmetrics services</li> </ul>	<ul style="list-style-type: none"> <li>- No database search from within the programme</li> <li>- Creation of bibliographies only with cut &amp; paste</li> <li>- Sharing of documents with wider public could become copyright issue. Check copyright legislation in your country.</li> </ul>	For all user groups
<b>RefWorks</b>	<ul style="list-style-type: none"> <li>+ Platform independent and web based</li> <li>+ Easy to use Word Add-In</li> <li>+ Comprehensive help</li> <li>+ Collaboration in RefShare possible</li> </ul>	<ul style="list-style-type: none"> <li>- Attaching of documents (images, PDFs) only with campus licence</li> <li>- No editing of full texts; no import of quotes from database</li> </ul>	For all user groups
<b>Zotero</b>	<ul style="list-style-type: none"> <li>+ Desktop version, Firefox extension and web based</li> <li>+ Platform independent (Windows, Mac, Linux)</li> <li>+ Open Source, free</li> <li>+ Social Networking; sharing of papers in groups</li> <li>+ Creation of separate notes (unrelated to references)</li> </ul>	<ul style="list-style-type: none"> <li>- No database search from within the programme</li> <li>- No editing of full texts</li> </ul>	<ul style="list-style-type: none"> <li>&gt; For undergraduates (free)</li> <li>&gt; For smaller reference collections</li> <li>&gt; All research areas</li> </ul>

## **Imprint**

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Disclaimer:

All information for this software comparison is compiled after comprehensive software testing. However, due to the complexity and continuing development of applications we can not assume any guarantee for the accuracy of the information.

If you detect any errors or omissions please contact us at [literaturverwaltung@ub.tum.de](mailto:literaturverwaltung@ub.tum.de).