

## Reference Management Tools Survey: Initial Summary of Responses

*(8-7-13, Ken Winter)*

**Survey Call:** This Fall TRB will hold a Webinar demonstrating ways TRID users can save time, reduce duplicated effort, and maximize their search results with reference management tools like Endnote, Refworks or Zotero.

To better understand the extent to which transportation library personnel and their patrons utilize such citation management tools, we are conducting a brief survey.

Responding takes only minutes, is completely anonymous, and will help ensure the Webinar addresses your needs along with those of other users.

This survey will close at 5:00 p.m. Eastern, July 31, 2013 and results will later be posted to TRANLIB.

We welcome multiple responses from an organization, but request only one response per individual.








Thank you!

Ken Winter (VDOT Research Library)

Bill McLeod (TRB Library)



**Summary Results:** In July 2013 Ken Winter (VDOT Research Library) and Bill McLeod (TRB Library) conducted a 10-question online survey to gather information on citation management tool usage and preferences by transportation information professionals. The total survey population was approximately 300 members of the TRANLIB listserv. There were 45 responses, a response rate of approximately 15%. Of all respondents, 42% were from personnel at state DOT libraries. Respondents reported they work primarily (40%) with “engineers or technical practitioners.” Of all respondents, 62% said they had not used any citation management software in the last 12 months and 46% said they did not think their patrons had either. Of respondents who thought their patrons had used citation management tools in the past 12 months, 56% reported they believe their patrons had used Endnote or Endnote Web, 31% said Refworks, and 22% said Zotero. Two “other” references mentioned the tool Mendeley, which was also mentioned multiple times in open response options. When asked what they thought their patrons used “most often” the respondents said Endnote (33%), Refworks (26%), Endnote Web (6%) and Zotero (4%). About 69% of respondents said the library where they work has not supported the use of such tools (either formally or informally) in the past 12 months. When asked what citation management tool they would use as information professionals (if they could pick any tool), the majority (49%) said “other” and their open responses indicated that many respondents do not feel like they know enough to make an informed decision right now, but would like to learn more about their options. Some respondents did express a preference for specific tools. Top ranked was Endnote at 17% (N=8), then Zotero at 15% (N=7), then Refworks at 13% (N=6), then “I would not use any” at 11% (N=5), and finally Endnote Web at 7% (N=3). Of the 36 respondents who answered the question: “Why would you select that citation management tool?” 47% said “because it is affordable or free.” Final comments seemed enthusiastic about learning more on the topic and a few respondents expressed specific ideas about what they’d like to know more about. Overall response for the general subject as the topic of a TRB Webinar seemed positive with the demographic surveyed.

## Full Survey Responses:

1. The library type that MOST CLOSELY matches my workplace is a:		 Create Chart	 Download
		Response Percent	Response Count
State DOT-funded library		42.2%	19
Federally funded library		6.7%	3
Private or corporate library		15.6%	7
Municipal library		0.0%	0
Academic (undergraduate, graduate or other type) research library		24.4%	11
Other type of library(please specify) <a href="#">Show Responses</a>		11.1%	5
		answered question	45
		skipped question	0

## Q1:5 Open Responses

1. Joint federal and state government funding, 7/23/2013 10:22 PM
2. Large Transportation/Transit Agency Library, 7/18/2013 12:37 AM
3. Federally funded State DOT library, 7/18/2013 12:00 AM
4. transit agency, 7/17/2013 3:33 PM
5. not-for-profit technical association library, 7/17/2013 12:07 AM






2. The majority of the patrons I work with (by role) are:			 Create Chart	 Download
		Response Percent	Response Count	
Students, instructors or researchers		22.2%	10	
Engineers or technical "practitioners"		40.0%	18	
Managers, policy makers or executives		2.2%	1	
A little of each of those groups		33.3%	15	
Other (please specify) <a href="#">Show Responses</a>		2.2%	1	
			answered question	45
			skipped question	0

### Q2: 1 Open Response

1. Engineers & managers/policy makers -- no students, 7/25/2013 10:36 AM

3. In the last 12 months I have used the following citation management tools at work.

[Create Chart](#) [Download](#)

		Response Percent	Response Count
Endnote		17.8%	8
Endnote Web		0.0%	0
Refworks		15.6%	7
Zotero		15.6%	7
I have not used any citation management software at work during this time		62.2%	28
Other (please specify) <a href="#">Show Responses</a>		13.3%	6
		answered question	45
		skipped question	0

**Q3: 6 Open Responses:**

1. Mendeley, 7/24/2013 10:41 AM
2. Mendeley, 7/22/2013 4:10 PM
3. I cut and paste and add contact and institutional hyperlinks and full-text to my bibliographic projects, 7/18/2013 9:42 AM
4. BibMe, 7/17/2013 5:47 PM
5. Mendeley, 7/17/2013 4:31 PM
6. Mendeley, 7/17/2013 11:49 AM









4. In the last 12 months I think some of my library's patrons have used the following citation management tools:

 Create Chart  Download

		Response Percent	Response Count
Endnote		44.4%	20
Endnote Web		11.1%	5
Refworks		31.1%	14
Zotero		22.2%	10
They don't use such tools as far as I know		46.7%	21
Other (please specify) <a href="#">Show Responses</a>		8.9%	4
		answered question	45
		skipped question	0

**Q4: 4 Open Responses**

1. Mendeley, 7/22/2013 4:10 PM
2. NoodleBib, 7/17/2013 5:47 PM
3. Mendeley, 7/17/2013 4:31 PM
4. only the grad students, 7/17/2013 11:51 AM




5. I believe the citation management tools MOST FREQUENTLY used by my patrons is/are:		 Create Chart	 Download
		Response Percent	Response Count
Endnote		33.3%	15
Endnote Web		6.7%	3
Refworks		26.7%	12
Zotero		4.4%	2
They don't use such tools, as far as I know		40.0%	18
Other (please specify) <a href="#">Show Responses</a>		8.9%	4
		answered question	45
		skipped question	0









#### Q5: 4 Open Responses

1. I am not sure which one they use most frequently, 7/18/2013 2:51 PM
2. don't know, 7/18/2013 2:14 PM
3. Not sure., 7/18/2013 10:11 AM
4. mendeley, 7/17/2013 4:31 PM

6. In the last 12 months the library where I work has assisted or supported its patrons in their use of citation management tools.

[Create Chart](#) [Download](#)

		Response Percent	Response Count
Yes		24.4%	11
No		68.9%	31
I'm not sure		6.7%	3
		answered question	45
		skipped question	0

7. If you answered "Yes" to question 6, how did your library support those patrons?		 Create Chart	 Download
		Response Percent	Response Count
Informal instruction (answering simple questions)		45.8%	11
Formal instruction (classes, webinars, instructional videos, etc.)		16.7%	4
Creating/managing user accounts, or installing/configuring software.		4.2%	1
Selecting or purchasing a citation management system.		8.3%	2
Marketing or promoting a citation management system.		4.2%	1
Other (please specify) <a href="#">Show Responses</a>		54.2%	13
		answered question	24
		skipped question	21

### Q7: 13 Open Responses

1. patrons are not using such tools for now, 7/25/2013 10:46 AM
2. Have not used, 7/18/2013 12:00 AM
3. N/A, 7/17/2013 5:47 PM
4. N/A, 7/17/2013 3:33 PM
5. Referred users to those more familiar with the software, 7/17/2013 2:07 PM
6. no support, 7/17/2013 12:57 AM
7. I didn't answer Yes but I still have to answer this question., 7/17/2013 12:47 AM
8. We did not assist in the use of these tools., 7/17/2013 12:24 AM
9. NA, 7/17/2013 12:08 AM
10. no support, 7/17/2013 12:07 AM
11. No to question 6., 7/17/2013 11:54 AM
12. No., 7/17/2013 11:52 AM
13. We have problems with the students using Endnote to create bibliographies in Research Reports - that makes the bib uneditable. 7/17/2013 11:51 AM



8. If you could pick any citation management tool to use at work, what would it be?			Create Chart	Download
		Response Percent	Response Count	
Endnote		17.8%	8	
Endnote Web		6.7%	3	
Refworks		13.3%	6	
Zotero		15.6%	7	
I would not use any citation management software		11.1%	5	
Other (please specify) <a href="#">Show Responses</a>		48.9%	22	
			answered question	45
			skipped question	0

### Q8: 22 Open Responses

1. not sure..I am still researching the various tools available, 7/25/2013 10:46 AM
2. They don't appear to need such a tool, but I am open to offering one, 7/25/2013 10:15 AM
3. Not familiar with any really; had probs with Endnote, 7/25/2013 9:01 AM
4. No idea, 7/24/2013 9:31 PM
5. Zotero, Mendeley or Refworks (if the price was right), 7/24/2013 10:41 AM
6. Don't know enough to choose between them, 7/23/2013 10:22 PM
7. I'm not sure., 7/23/2013 11:06 AM
8. I do not know., 7/22/2013 1:07 PM
9. Do not have an opinion, 7/19/2013 2:41 PM
10. not familiar enough with endnote and refworks to choose, 7/19/2013 12:24 AM
11. I haven't used Endnote to be able to answer this question, 7/18/2013 2:51 PM
12. I do not know enough about them to choose, 7/18/2013 2:14 PM
13. Maybe Refbase?, 7/18/2013 12:00 AM
14. Don't know enough about them to recommend, 7/18/2013 10:45 AM
15. What ever will work best given our IT infrastructure, 7/18/2013 10:11 AM
16. I like my approach. See question #3 above., 7/18/2013 9:42 AM
17. Currently looking at cheaper (free) options, 7/17/2013 6:01 PM
18. Mendeley, 7/17/2013 4:31 PM
19. I know they exist but I'm unfamiliar with their use., 7/17/2013 3:33 PM
20. Would need something free., 7/17/2013 12:32 AM
21. Don't know anything about the software, 7/17/2013 12:08 AM
22. Mendeley, 7/17/2013 11:49 AM

9. Why would you select that citation management tool?			Create Chart	Download
		Response Percent	Response Count	
It is affordable or free		47.2%	17	
I find it easy to use		38.9%	14	
It has specific features I like		19.4%	7	
Other (please specify) <a href="#">Show Responses</a>		30.6%	11	
			answered question	36
			skipped question	9

#### Q9: 11 Open Responses

1. still researching, 7/25/2013 10:46 AM
2. Need one that allows use by multiple researchers so references only have to be entered once but not prohibitively expensive, 7/23/2013 10:22 PM
3. Seems to have a lot of flexibility based on Wikipedia charts, 7/18/2013 12:00 AM
4. N/A, 7/18/2013 9:42 AM
5. Many databases offer direct export of saved lists to EndNote format, 7/17/2013 5:47 PM
6. It works in all browsers (Zotero only works in Firefox), 7/17/2013 4:31 PM
7. Our academic institution has it for all, 7/17/2013 2:07 PM
8. do not use, 7/17/2013 12:57 AM
9. insufficient knowledge of this type of tool, 7/17/2013 12:07 AM
10. It's Open Source, easily extendable and works well with LaTeX., 7/17/2013 11:49 AM
11. standard for our institution, 7/16/2013 5:17 PM

10. Please share any additional comments you think will help the presenters.		<a href="#">Download</a>
	Response	
	Count	
<a href="#">Show Responses</a>		16
answered question		16
skipped question		29

### Q10: 16 Open Responses

1. I would like to know more about these tools and to hear about the results of this surevy in regards to most popular tool...pros and cons of each., 7/25/2013 10:46 AM
2. The main reason for using this software is to save time removing duplicate items and formatting the results when searching multiple databases., 7/25/2013 10:36 AM
3. The choices look to be overwhelming - if you want to focus on the ones specifically listed in #8, I'd go with Zotero or Endnote Web. What do techies Kendra and Leighton use?? Academics probably have access to sofware that rest of us do not. Maybe another Pooled Fund project??, 7/18/2013 12:00 AM
4. I don't currently use this type of software but feel it could be useful; look forward to your presentation., 7/18/2013 10:45 AM
5. I gave just this presentation to the Transportation Student Association at Iowa State, and will give something like it, but short, at the upcoming 2013 Mid-Continent Transportation Symposium. These are valuable tool and more presentations like this are vital. It would be great if we could do some presentations on this at TRB., 7/18/2013 10:11 AM
6. To the best of my knowledge, there is no citation management tool on the market which automatically captures/includes E-mail addresses (authors, editions, etc.), institutional address hyperlinks and full-text hyperlinks of the actual articles/documents, plus extensive abstracts/summaries. Also, the bibliographic projects I submit to my requestors include eye candy, like the program's logo/icon and my personal contact information. I guess all this can be added after, but how does that save time?, 7/18/2013 9:42 AM
7. You probably have noticed, but TRID does not export organization information with their RIS file (or at least it doesn't show up in Endnote). I contacted TRB about this over a year ago and was told it was on their to-do list but was not a priority. This severely limits the effectiveness of exporting TRID records for reports, because I manually have to enter the organization information. It may be that I could create an import filter and import the TRID file after saving it, but without having information about the tags they are using, it is difficult to do. I was told TRB does not provide EndNote support., 7/18/2013 8:35 AM
8. For many years my Library provided access to Refworks for our clients. We provided regular formal training sessions and telephone support. However, following severe budget cuts and staffing loss last year, our subscription to Refworks was cancelled. We have not yet replaced it with any other bibliographic referencing tool but are looking to do so, as soon as possible. Any replacement tool we choose will have to be free. We are investigating Office 2013 bibliography tool., 7/17/2013 6:01 PM
9. Many of our researchers who are producing bibliographies to publish a report rely too heavily on the citations produced by Zotero and other tools without looking at the requirements in whichever style guide they are required to use. The citation is only as good as the information imported into the tool

so people should manually check the data imported into the CM tool (e.g. if the particular style being used requires spelling out first names of authors but the source bibliographic record only gave initials regardless of what is on the referenced publication itself.), 7/17/2013 5:47 PM

10. It would be FANTASTIC if TRID records could be easily migrated to citation management software, and I'd love more instruction on using these. We can only use free citation management as the paid ones are expensive., 7/17/2013 4:31 PM
11. Thanks for researching and presenting on this topic., 7/17/2013 3:33 PM
12. I should have been using these tools for years but am just now learning how to use them and am looking forward to the webinar. I've seen videos that make everything look so easy, but that doesn't help when that cool function they showed is greyed out in Zotero (e.g., capturing a web page). Wish learning this was easier but I'll get through it. [By the way, there's a glitch in this survey. You MUST answer question 7 even if you did NOT reply "Yes" to question 6.], 7/17/2013 12:47 AM
13. I checked with our Editor, and she is unaware of any citation management tools being used by researchers in research reports. Researchers are directed to the TRB Information for Authors and the Chicago Manual of Style for formatting references. The University offers access to EndNote Basic and Zotero., 7/17/2013 12:24 AM
14. Because so much transportation material is so badly indexed, I wish more and current bibliographies were available., 7/17/2013 12:08 AM
15. I have almost no knowledge of patron use of citation management tools, and little personal experience with them. Some overview of the tools for the uninitiated may be helpful., 7/17/2013 12:07 AM
16. We used Reference Manager at a library I used to work at. It was used department-wide both as a library management tool/repository (in place before I got there) as well as a citation tool. I guess it would be important to look at whether or not these tools are personal use or used for sharing/collaboration on projects. What can be done with them, basically, and what are their limitations?. 7/17/2013 11:54 AM

-END-