



The Relevance of Understanding Referencing Styles in the Era of Reference Managers

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Abstract

Keywords

- ▶ citation
- ▶ endnote
- ▶ Harvard
- ▶ limitation
- ▶ manuscript
- ▶ scientific writing
- ▶ Vancouver
- ▶ Zotero

Writing the references of a manuscript accurately requires a significant amount of time and effort. While it can be a daunting task for beginners, even experienced authors can find it time consuming. The advent of reference managers brought a ray of hope of an end to this tedious toil. While these managers have eased the authors' task to a great extent, they may not always be completely accurate in the reference output they generate. Errors, inaccuracies, omissions, and compatibility issues do occur at times with the best of reference managers. It is thus of paramount importance to be able to recognize these issues and address them before submitting the manuscript to the journal. Sound knowledge of referencing styles helps in quick recognition and redressal of such errors thus increasing accuracy, ensuring consistency of references, and saving the author's time.

References and Citations

References are the source from where the information has been drawn. All such sources, that is, references, are listed at the bottom of a manuscript. There are various styles of writing these references and every journal has guidelines on the style they require the authors to use. Journals require the references to be accurate and consistent with their style and guidelines. This helps the readers to easily understand the reference and look up the quoted source. Referencing the information in a manuscript is important for lending authority to the writing and giving the authors of the source the due credit.¹

Citations, on the other hand, are indicators within the body of the manuscript of the fact that certain information has been taken from an external source. That is why they are often referred to as “in-text citations.”² Citations can be written as author names and year of publication in brackets

with references listed in alphabetical order at the end of the manuscript (author-date style) or as numbers corresponding to the number of the source/reference in the list at the end (numeric style).³

The need for authors to understand referencing styles There is a scientific construct in writing the references; thus, it is important to understand this construct to avoid errors while writing the references. Typically, a reference to a journal article would include the names of the first few (3–6 and sometimes all) authors, the title of the manuscript, the name of the journal, date of publication, volume, issue, and page numbers. Certain journals would ask the authors to add a digital identifier like the digital object identifier (DOI) or the PubMed identifier (PMID). Similarly, when referencing an online document, the

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name of the web site, the title of the web page, the web address (uniform resource locator [URL]), and also the date when the URL was last accessed by the author are included.^{2,3} It is important as information on the web or its availability can change in course of time.

Challenges Faced While Writing References

Almost every other journal has a unique style that they require the references to be formatted in. The reference has many components and there is a specific way of writing these. Writing the references accurately requires significant effort and time on the part of the author. For example, most styles require the authors to use the abbreviation of the journal as per the National Library of Medicine (NLM) catalogue, rather than the full name. So, while constructing the reference, the author has to look up the NLM catalogue for the abbreviation of the journal. While a journal using a numeric referencing style such as Vancouver may require both the volume and the issue numbers, another publication also using the Vancouver style may want only the volume of the journal.^{4,5} Within the same basic style, one journal may require the authors to put “et al” after the first 3 authors, while another may allow the authors to list six authors before “et al.” There are other minor variations where one journal may ask the authors to write “online” and other may require the term “internet” for a reference to an online article. The first challenge is to read and understand the journal’s specific requirements and construct and format the references accordingly. Another challenge is when the article is rejected by a journal, and the author needs to re-format the references as per the requirements of the other journal they plan to submit to.

Reference Managers

Reference managers are software that help authors collate, arrange, and insert references into their manuscripts.^{6–8} The various functionalities that reference managers offer are as follows:

- Authors can add all the potential references for their manuscripts to the reference manager’s libraries. Many reference managers provide extensions that can be added to the web browsers that enable adding any reference sources encountered online to the reference manager at the click of a button.
- Reference managers populate all the details of the source required to construct a reference. For example, for a journal article, the software populates details such as the full list of authors, title of the manuscript, journal name, volume, issue and page numbers, date of publication, and DOI. These can be edited and any information can be added if the reference manager has populated incorrect or incomplete information due to source-manager incompatibility.
- Most reference managers have extensions available that allow their seamless integration with word processing applications such as Microsoft Word. While working on the manuscript in the word processor, authors can enable this

extension and conveniently add the citation at the appropriate position in the manuscript. Once these citations have been mentioned in the text, references can be populated at the end of the manuscript with the click of a button.

- Reference managers allow users to create multiple libraries and folders. Authors can thus create separate folders to separately catalogue the references for different manuscripts that they are working on.
- Reference managers provide multiple referencing styles that the authors can choose from for generating the reference list depending upon the requirements for each journal. So, if one journal rejects the manuscript and the author wishes to submit it to another journal which uses a different style of referencing, the author can simply change the style in the reference manager and all the references in the list would be automatically modified accordingly.
- Apart from providing the authors with a range of referencing styles, reference managers also provide the authors with a certain degree of freedom to customize the styles. For example, if a reference manager offers the option of numbers in square brackets or numbers as a superscript for in-text citation in the numeric reference style, if needed the authors may modify it to numbers in square brackets as superscript. Authors may be able to customize a style to add or remove journal issue numbers.
- Reference managers are particularly useful while doing systematic reviews which generally involve a huge number of references. Systematic reviews and meta-analyses are reported as per Preferred Reporting Items for Systematic Reviews and Meta-Analysis (PRISMA) guidelines. These guidelines require the authors to mention the numbers of articles identified, duplicates found and removed, articles screened, those included and excluded after screening. Reference managers provide the functionality and also help authors keep easy track of any additions and deletions from the list.⁹ They also facilitate easy sharing of reference lists between collaborators.

The important features of three commonly used reference managers are depicted in ►Table 1.^{10–13} This shall help readers appreciate the functionality and utility of these managers and also help them understand how each of these may be better than other for a particular use or user.

Limitations and Shortcomings of Reference Managers

Reference managers do make the task of managing and writing references easy but they have certain limitations^{14,15}:

- Not all the sources such as journal articles online or their portable document format (PDF) files may be recognized and their details may not be automatically populated by the reference managers and the authors would need to add these manually.
- When a reference manager is unable to automatically add a source in the software and populate its details, the details need to be added manually. The task is made

Table 1 Features of Endnote, Mendeley, and Zotero reference managers

Feature	Endnote	Mendeley	Zotero
Functionality within the reference managing software			
Referencing styles supported	Vancouver, Harvard and most other commonly used styles	Vancouver, Harvard and most other commonly used styles	Vancouver, Harvard and most other commonly used styles
Edit referencing styles	Yes	Yes	Yes
Search for references by	Any field	Author, title, publication title, year, notes	Any field
Find and replace everywhere in the document	Yes	No	No
Attaching notes to references	Yes	Yes	Yes
Duplicate record detection	Yes	Yes	Yes
Sync annotated PDF files	Yes	Yes	Yes
Annotate PDF within the manager	Yes	Yes	No
Extract information for citation from PDFs	Using DOI and PubMed identifiers	By scanning and analyzing the PDF text	Using DOI and other information
Screen-capture webpages	No	No	Yes
Functionality for sharing and collaboration			
Sharing references between collaborators	Free with 200 EndNote users	Free for public groups. Paid for private groups with more than 3 members	Free
Sharing "read-only" reference library	Yes	Yes	Yes
Integration with word processors			
Integration with MS Word for Windows and macOS	Yes	Yes	Yes
Integration with Google Docs	No	No	Yes
Storage and support			
Number of records that can be saved	Unlimited	Unlimited	Unlimited
Operating systems supported	Windows, MacOS	Windows, MacOS, Linux	Windows, MacOS, Linux
Mobile operating systems supported	iOS	iOS, Android	Third party iOS, Android
Export file formats supported	BibTex, Medline	BibTex	BibTex, Medline
Import file formats supported	Medline	BibTex	BibTex, Medline
Integration with databases and search software	PubMed	PubMed	PubMed, Unpaywall
Cost	Paid	Free software. Pay for additional online storage beyond 2 GB	Free software. Pay for additional online storage beyond 300 MB

Abbreviations: DOI, Digital Object Identifier; iOS, iPhone Operating System; MacOS, Macintosh Operating System; MS, Microsoft; PDF, portable document format.

further difficult by another complexity. When using the word processor extensions of the reference managers, the in-text citations get linked to the list of references and thus it may not be possible to simply write down this reference in the list in the word processor. In this case, the author has to fill in all the information in the software application that often is more time-consuming and requires more effort.

- Journals may use variations in standard reference styles and the particular customizability may sometimes not be available in the reference manager. In such a case either the references have to be written by authors or those generated by the software may need to be carefully edited.
- These reference managers are programmed software and thus a single inadvertent change in the setting by the user may lead to errors in all the generated references.

- Certain reference managers are not free to use and the subscriptions incur a significant recurring fee. Many others offer limited functionality in their free versions.

Relevance of Knowing Referencing Styles When Software is Available

Correcting inaccurate references can be much more time-consuming and effort-intensive compared with writing the references manually from scratch. Thus, most journals put the onus of the accuracy of the references on the authors. Reference managers apart from the few errors that occur due to software limitations can also introduce errors in all or most of the references due to a change in software system settings. The inability to recognize and correct these errors may imply a lack of knowledge of scientific writing or a casual approach by the authors. Editors and reviewers of reputed journals would not prefer to further engage with authors who they believe lack basic knowledge of scientific writing and may require a lot of time and/or repeated cycles of reviews and revisions to correct the references, and may recommend outright rejection of the manuscript.

The authors must carefully look at each reference generated by the reference manager and ensure that any and all errors are ironed out. Apart from seeing the journal's guidelines, it is a good practice to look at the references of the articles published previously in the same journal.

While experienced authors too need to refer to the specific journal's style and guidelines, sound knowledge and understanding of the scientific construct of a reference help the authors check and correct the generated references comparatively quickly.

As discussed earlier, errors may creep into the generated references because of the limitation of the software or an inadvertent change in the software setting. An author who understands referencing styles would be able to identify such errors readily and correct them.

Take-Home Message

Reference managers are helpful software, which if used judiciously, can help authors increase their writing efficiency. Albeit, it is important to understand that these managers have certain limitations and may not always generate completely accurate references. A thorough understanding of the construct of references and sound knowledge of referencing styles would help authors identify errors in the references generated by these managers and rectify them in a quick time. On the other hand, ignoring these errors or the inability to identify and correct the errors may lead to the rejection of even an otherwise good manuscript.

Ethical Statement
Not applicable.

Author Contributions

M.G. conceptualized and drafted the manuscript. M.G. and N.G. contributed to literature search and revised the manuscript and gave final approval of the manuscript.

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Conflict of Interest

None declared.

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