Reference Management Using MS-Word Software: A Practical Approach

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ABSTRACT

The researchers / scholars who use MS-WORD for manuscript preparation of a journal article / book chapter. For References Management ,In-text citations, Bibliography generation and formatting using a standard Style (e.g., MLA, APA, Chicago etc.), "References" feature of MS-WORD 2007 (and onwards) helps them to complete their manuscripts with ease. Though it has some limitations, as compared to a Reference Management Software (e.g, Zotero, Mendeley etc.), it serves the purpose for a small manuscript of a journal article preparation .This paper discusses important functions served by the References Tab in MS-WORD 2007, with practical approach.

KEYWORDS: RMS, Reference Management Software, Citation, Bibliography, Citation Style, MS-WORD

INTRODUCTION

Traditionally, the researchers / scholars used to record bibliographic data of a source document (e.g., book, journal article) on a paper / cards, as shown in the Fig. 1. When completed the work, these cards help to cite a document, as all details are recorded. At the end, the cards are sorted by specific order, say Author wise, and the bibliography is prepared. There are chances that the researcher may not record all bibliographic data about a document. Further, sorting of these cards is a bit difficult task. The researcher may forget about source document of a selected text / quote, thus prone to unintentional plagiarism. So, Reference Management Software is a solution for this.

1.1.1
American Psychological Association (Ed.) (2010). Publication manual of the American Psychological Association (6th ed.). Washington, DC: American Psychological Association.

1.1.2
Basak, S. K. (2014).Reference management software : comparative analysis of RefWorks and Zotero. 8(11), 1972 – 1975.

1.1.3
Basak, S. K. (2015). A comparison of three reference management software: Jabref, zotero, and endnote. International Journal of Research in Information Technology.

1.1.4
Fenner, M. Scheliga, K. & Bartling, S (2014). Reference management. In S. Bartling & S. Priesike (Eds.), Opening science: the evolving guide on how the internet is changing research, collaboration and scholarly publishing. (pp. 125-137). https://doi.org/10.1007/978-3-319-00026-8_8

***Fig 1** Traditional way of recording sources referred*

Fenner, Sche, Kaja and Bartling (2014) observed that, "Citations of relevant works are an integral part of all scholarly papers. Collecting, reading, and integrating these references into a manuscript is a time-consuming process, and reference managers have facilitated this process for more than 25 years. In the past 5 years, we have seen the arrival of a large number of new tools with greatly expanded functionality. Most of the newer reference managers focus on the collaborative aspects of collecting references and writing manuscripts. A number of these newer tools are web-based in order to facilitate this collaboration, and some of them are also available for mobile devices. Many reference managers now have integrated PDF viewers (sometimes with annotation tools) for scholarly papers. Reference managers increasingly have to handle other forms of scholarly content, from presentation slides to blog posts and web links. Open source software and open standards play a growing role in reference management. This chapter gives an overview of important trends in reference management and describes the most popular tools."

*Fenner, Sche, Kaja and Bartling (2014) further added, "*Reference management is perceived to be tedious and time consuming by many researchers, especially when it is done manually. In the past, references used to be written on index cards and stored in boxes. Now, reference management software allows for the digitalization of a personal collection of relevant scholarly publications. The earliest programs to manage the basic task of storing references and adding them to manuscripts have been around for over 25 years (including Endnote and BibTeX/LaTeX-based programs which are still popular today), but each individual entry had to be typed by hand. In the last 15 years we have seen a number of significant developments that have made reference management much easier for the researcher:

1. Retrieval of reference information from online bibliographic databases
2. DOIs and other persistent identifiers for bibliographic information
3. Automated management of PDF files
4. Open Access for easier access to full-text content
5. Web-based reference management for easier collaboration and use across multiple devices"

What is a Reference Manager?

A reference manager supports researchers in performing three basic research steps: searching, storing, and writing. It helps researchers find relevant literature, allows them to store papers and their bibliographic metadata in a personal database for later retrieval, and allows researchers to insert citations and references in a chosen citation style when writing a text. To support those steps, a reference manager should have the following functionalities as identified by Gilmour and Cobus-Kuo (2011):

1. Import citations from bibliographic databases and websites
2. Gather metadata from PDF files
3. Allow organization of citations within the reference manager database
4. Allow annotation of citations
5. Allow sharing of the reference manager database or portions thereof with colleagues
6. Allow data interchange with other reference manager products through standard metadata formats (e.g. RIS, BibTeX)
7. Produce formatted citations in a variety of styles
8. Work with word processing software to facilitate in-text citation

A reference manager is a software package that allows scientific authors to collect, organize, and use bibliographic references or citations. The terms citation manager or bibliographic management software are used interchangeably. The software package usually consists of a database that stores references and citations. Once a citation is inserted into the database, it can be reused to create bibliographies which are typically found at the end of a scientific text.

Holland, Matt and Matt (2012) observed that, "Good research is underpinned by effective information management. The research process typically requires a thorough review of previously published literature; locating, organising and analysing journals articles, books and other forms of publication. Reference Management Software [RMS] helps you to manage your references and associated electronic full text by providing a specialised database that allows you to capture, store, organise and share references you have identified as relevant to your research."

Vijai, Natarajan and Elayaraja (2019) stated that, "The correct citation of references is an honor to original ideas of previous authors and to avoid plagiarism. Currently, researchers can easily find, cite and store references using citation management software. This paper is discussed how to use popular citation management software (Zotero •Mendeley •EndNote •RefWorks •Citavi •PaperPile •JabRef •Papers •Docear) and reference tools in academic writing. The citation management software is very helpful for academic writing. Exactly what the name suggests: Reference management software used to manage the references in a document and information about a publication, book, journal article, video, etc. This study is based on the available sources from various university online libraries worldwide. This study very uses full for researchers, authors, reviewers, editors and the researcher community."

Lorenzetti, Diane and Ghali (2013) commented that, "Reference management software programs enable researchers to more easily organize and manage large volumes of references typically identified during the production of systematic reviews. The purpose of this study was to determine the extent to which authors are using reference management software to produce systematic reviews; identify which programs are used most frequently and rate their ease of use; and assess the degree to which software usage is documented in published studies."

Tramullas, Jesús and Sánchez-Casabón (2015) stated that, "Reference management software has been a useful tool for researchers since the 1980s. In those early years, tools were made ad-hoc, and some were based on the dBase II/III database management system. In a short period of time a market was created and commercial products were developed to provide support to this type of information resources. The need of researchers to systematize scientific literature in both group and personal contexts, and to integrate mechanisms into scientific production environments in order to facilitate and expedite the process of writing and publishing research results, requires that these types of applications receive almost constant attention in specialized library and information science literature."

The researchers / scholars who use MS-WORD for manuscript preparation of a journal article / book chapter need not rely on manual system (typing in-text citation, bibliography) or need not download/install separate Reference Management Software (which may take extra computer space). MS-WORD Version 2007 onwards offers 'References' tab which serves most of the purposes, while creating manuscript.

To start with, if one has all references recorded on paper/cards with him/her, insert these details in two ways:
Option 1: Create Master List in one shot : Go to **References** Tab. Select "**Manage Sources**" button. A dialog box [**Source Manager**] will be opened. Using "New…" option each time, the researcher can add all the recorded references, on by one. Now the master list is prepared. With the help of "Insert Citation" one can cite a source in text, where it is required. OR

Option 2: Inserting details of a resource, as and when required while citing it : Instead of entering/preparing the whole at a time, Insert Citation (one at a time) directly where it is supposed to be inserted. If this method is to be followed, one has to provide details of the resource to be cited, at the time of insertion.

Master List: This list will save bibliographic information from all of your documents, so you don't have to re-type the information if you use a source in several documents. The information in your Master List is saved on the local computer on which you create the reference, and will not transfer if you save the document to another source (e.g., a CD-R or your H: drive). However, all sources that you add to any document on that computer will be available from the Master List.

Current List: This list contains bibliographic information that you intend to use in the document you are working with. Each document will have a separate Current List. References in this list can be used for in-text citations and will be included in your bibliography. The information in this list is saved with your document, and will transfer if you save your document to another source (e.g., a CD-R or your H: drive). (https://www.uwec.edu/kb/article/microsoft-word-2007-managing-bibliographic-sources/ Accessed on 20.01.2021)

 Task: Creating a source (for future use i.e., in-text citation, bibliography etc.)

Go to [**References**] Tab, Select [**Manage Sources**] button.

A dialog box [**Source Manager**] will be opened. To create / enter a new resource, click on [**New …**] button. It will open a form to create source. Select Type of source & fill in the relevant bibliographic details.

Fig 2 Creating a Source
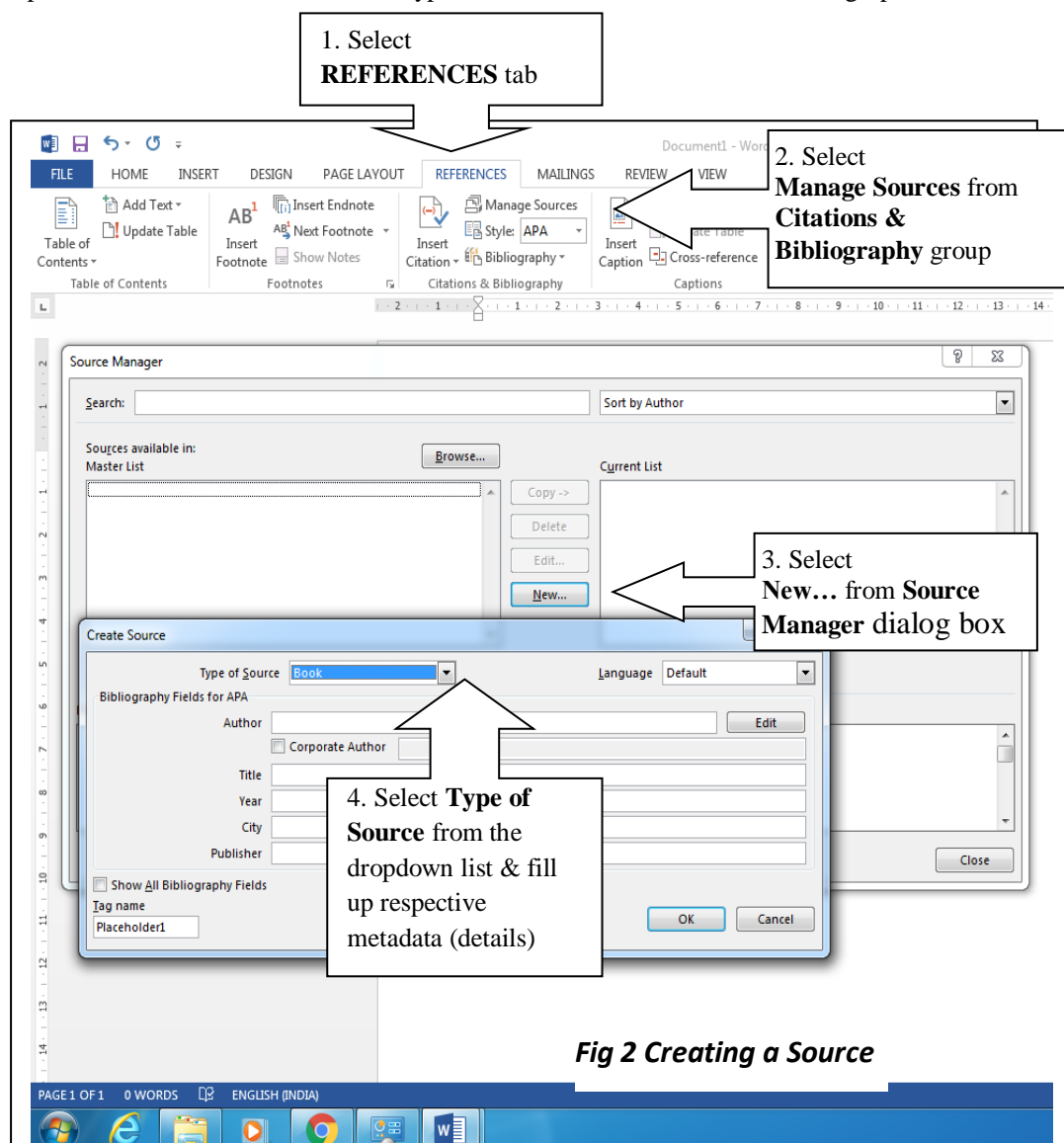
Task: **Inserting In-text citation**

On the **References** tab, in the **Citations & Bibliography** group, Click the arrow next to **Style** and click the style that you want to use for the citation and source.

e.g., Agriculture Science documents usually use the APA style for citations and sources. The major citation styles available in MS-Word 2007 are APA (sixth edition), Chicago (fifteenth edition), Harvard-Anglia (2008), MLA (Seventh Edition). The other options available in Style menu are GB7714 (2005), GOST-Title sort (2003), , IEEE (2006), ISO 690 –First Element and Date (1987), ISO 690 – Numerical Reference (1987), , SIST02 (2003) Turabian (Sixth Edition).

Click at the end of the sentence or phrase that you want to cite.

On the **Reference** tab, click **Insert Citation** and then do one of the following:

▪ To add the source information, click **Add New Source**, and then, in the **Create Source** dialog box, click the arrow next to **Type of Source**, and select the type of source you want to use (for example, a book section or a website).

▪ To add a placeholder, so that you can create a citation and fill in the source information later, click **Add New Placeholder**. A question mark appears next to placeholder sources in Source Manager.

  ▪ If you chose to add a source, enter the details for the source. To add more information about a source, click the **Show All Bibliography Fields** check box.
  ▪ Click **OK** when finished. The source is added as a citation at the place you selected in your document.

When you've completed these steps, the citation is added to the list of available citations. The next time you quote this reference, you don't have to type it all out again. You just add the citation to your document. After you've added a source, you may find you need to make changes to it at a later time. To do this, Edit a source.

If you've added a placeholder and want to replace it with citation information, your Edit a source.

If you choose a GOST or ISO 690 style for your sources and a citation is not unique, append an alphabetic character to the year. For example, a citation would appear as [Pasteur, 1848a].

▪ If you choose ISO 690-Numerical Reference and your citations still don't appear consecutively, you must click the ISO 690 style again, and then press ENTER to correctly order the citations.

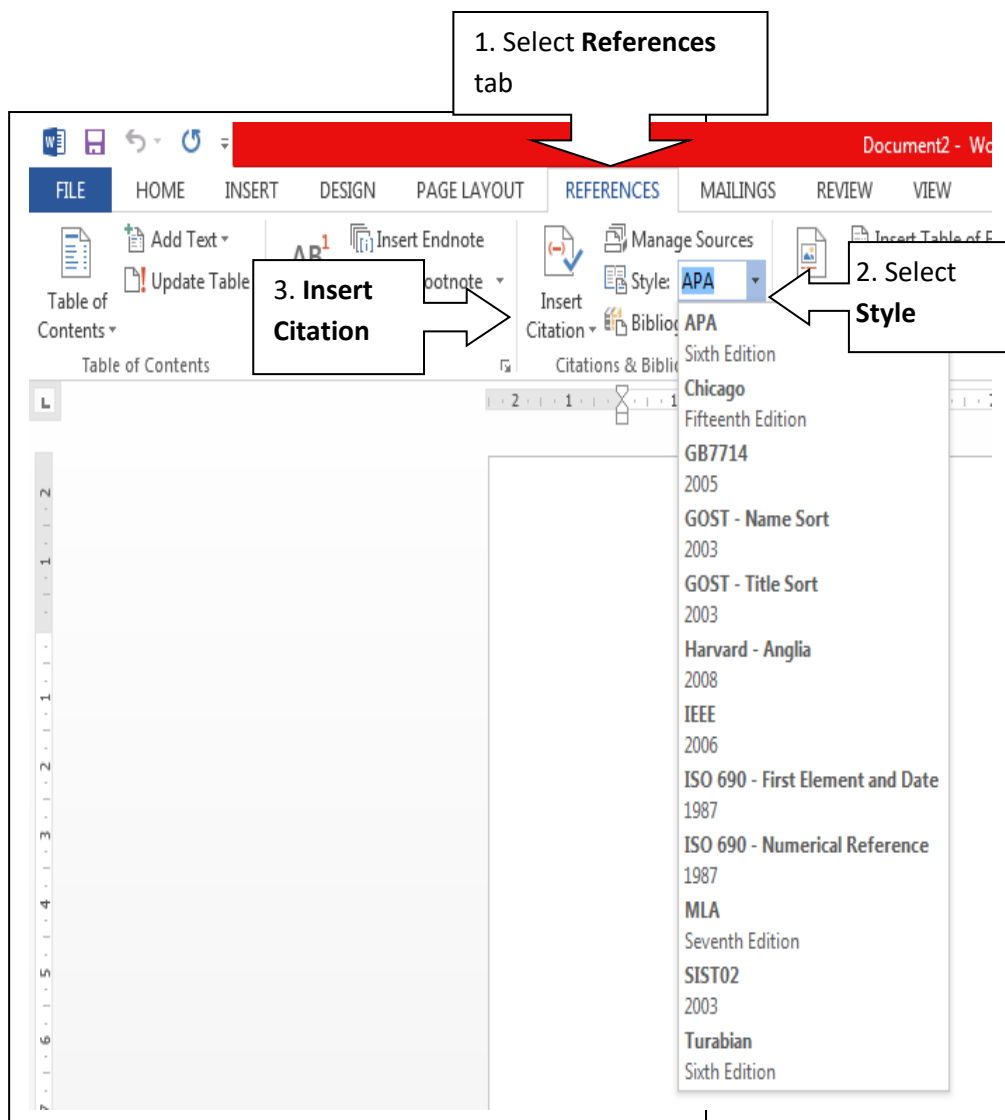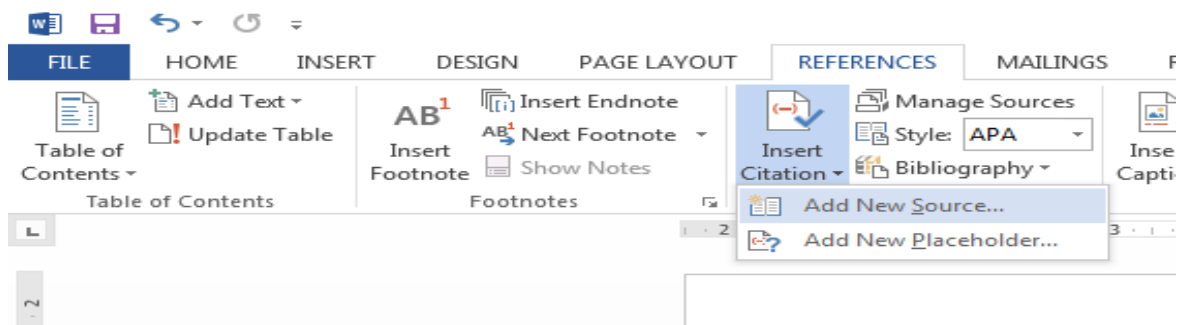(https://libguides.iun.edu/ Accessed on 19.01.2021)

Figure 1 In-Text Citation

The sources already entered will be available in the list form, and one has to just to select the source (no need to re-enter bibliographic details again).
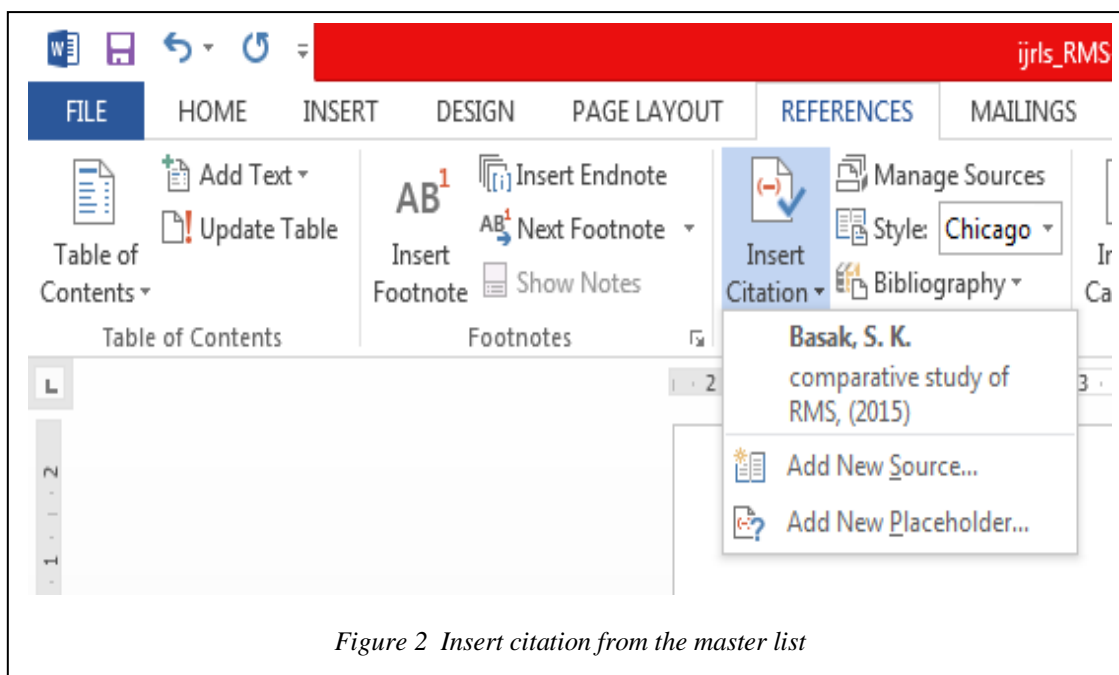
Figure 2 Insert citation from the master list

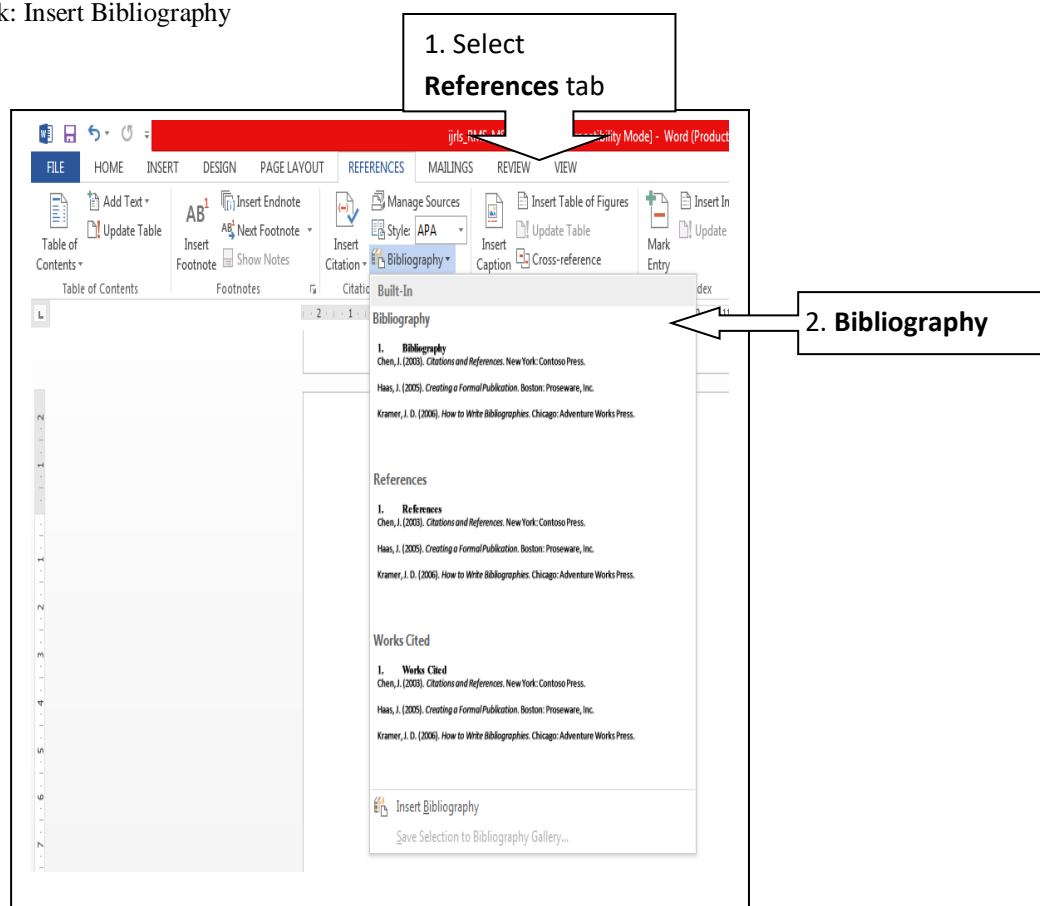**Task: Create a bibliography**

With cited sources in your document, you're ready to create a bibliography.

Put your cursor where you want the bibliography.

Go to References > Bibliography, and choose a format.

Tip: If you cite a new source, add it to the bibliography by clicking anywhere in the bibliography and selecting Update Citations and Bibliography.

Task: Insert Bibliography

Updating Citations & Bibliography: Suppose if one has selected Style as APA, created the manuscript, inserted in text citations, and finally the bibliography. Later on s/he has to resubmit the same manuscript with different Style as Chicago.

In this case, select Style as Chicago. In text citations as well as bibliography will be automatically updated. Or select the field e.g., Bibliography, right click and select the option Update Field.
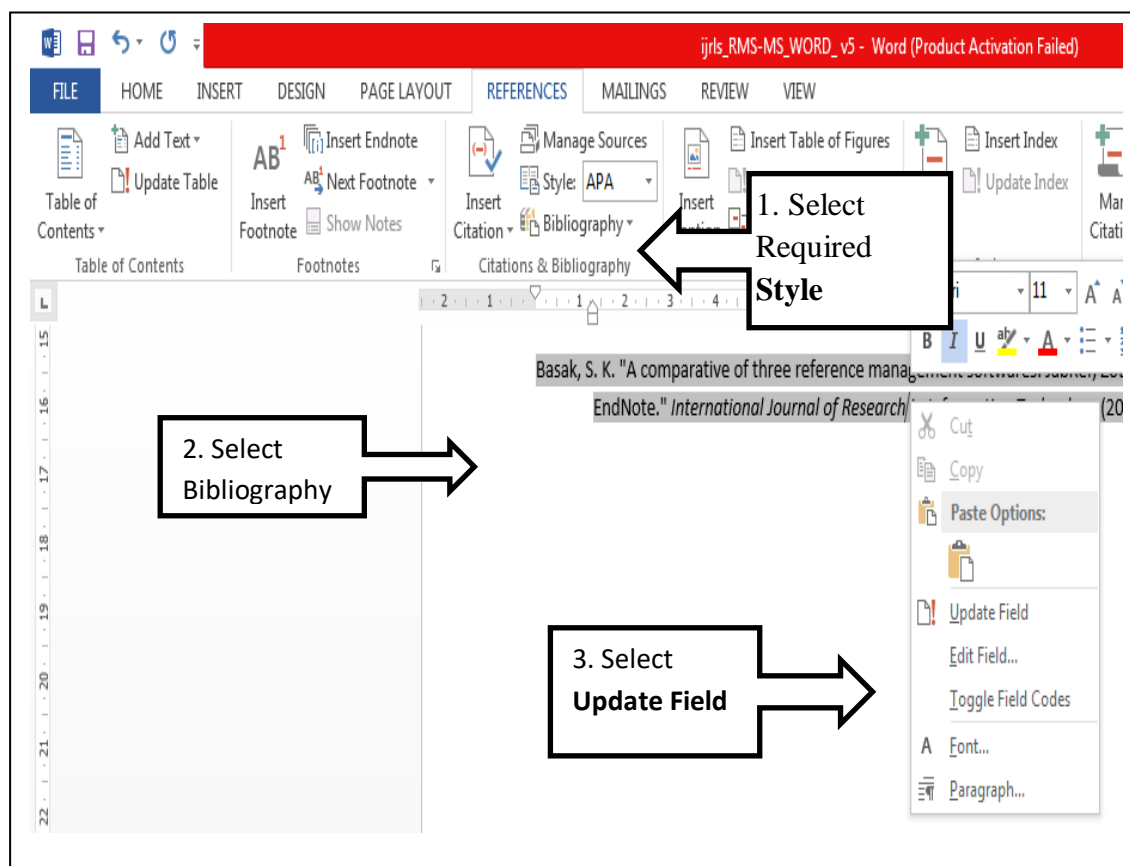
1.1.5 Advantages of Reference Management Software / RM software:

Inserting references.

Creating bibliographies.

Changing the reference system for resubmission.

(https://www.aje.com/arc/reference-manager-software-what-it-and-what-can-it-do/ Accessed on 01.01.2021)

When you are ready to add your in-text citations and your bibliography to your document, all the sources you would like to cite will need to be in the Current List for that document. To do this, you can either add new sources or sources from your Master List to your Current List.

(https://www.uwec.edu/kb/article/microsoft-word-2007-managing-bibliographic-sources/ Accessed on 01.01.2021)

If citation style in changed, all in-text citations and bibliography format can be updated easily.

LIMITATIONS

1. Type of Sources: Available Source types are: Book, Book Section, Journal Article,
   Source type Thesis is not available. Of course one a source type is not available in the list, Miscellaneous type can be selected.

2. Popular Reference Styles available : APA, MLA, Chicago only.

3. Citations are parenthetical references that are placed inline with the text. Citations are different from footnotes and endnotes, which are placed at the bottom of the page or end of the document. The source information stored in the Citations tool or Source Manager can be used to create citations, a works cited list, or a bibliography. However, you cannot use the information in the Citations tool or the Source Manager to create footnotes or endnotes. (https://support.microsoft.com/en-us/office/add-or-change-sources-citations-and-bibliographies-159264ec-0a8a-4e9e-acf7-21faa9c371c2 Accessed 29.01.2021)

4. To obtain / collect metadata from online databases automatically not possible.(how actually a reference management software like Zotero dos.)

5. A copy of the source document (e.g., pdf file) can not be attached and kept for future reference.

CONCLUSION

For small works like periodical article, book chapter of limited pages and limited sources referred, if the researcher / scholar is using MS-Word for manuscript preparation, MS-Word itself can be used for References management. Basic requirements are fulfilled with it.

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