

**Literature Referencing Tools**

# Why & when?

During the evaluation stage of the national ecosystem assessment process, authors gather information from peer-reviewed publications, grey literature and various other knowledge sources, such as indigenous and local knowledge, to address the key policy questions prioritised during the scoping stage. This information is then synthesised within the assessment chapters, providing the basis for the summary for policymakers. It is, therefore, critical for literature and knowledge sources to be accurately referenced throughout the report and stored to facilitate access to all assessment authors.

As a range of authors will be drafting the chapters of the national ecosystem assessment, referencing systems are useful for saving and managing the references cited in the assessment report. They enable better coordination between the various authors working on the assessment regarding the sources they use. Referencing systems also help ensure consistency across chapters in the way sources are referenced. A standard referencing method helps the readers to track the sources from which specific data, trends, methodologies, statements, and research results are quoted. Referencing also allows readers to evaluate the methodologies, results, and the evidence base upon which the national ecosystem assessment is based, contributing to its legitimacy. Finally, a reference management system helps the assessment’s reviewers by making all references used by authors accessible to reviewers, including materials that are not publicly available.

# who & How?

The technical support unit is responsible for supporting the organization and storage of all the references used by the authors in the assessment. Providing authors with a reference management system helps authors to reference their sources in a standardized and efficient way. Once authors are provided with a reference management system, they are responsible for correctly referencing and citing literature and knowledge sources used.

***Reference management systems***

Several referencing management systems are available for organizing and managing literature and knowledge sources, helping to create standard in-text citations and reference lists. The most used systems are Mendeley and Zotero\*. Using common drag and drop features, literature and knowledge sources can be stored and organised across multiple devices. Cloud storage platforms like Dropbox and Google Drive can also be used to backup references and heavy data sources that are not easily stored in reference management system*s.*

***Table 1: Advantages, disadvantages, and cost of Zotero and Mendeley reference management systems***

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| **Referencing software** | **Advantages** | **Disadvantages** | **Cost** |
| Zotero | * Unlimited number of private or public groups in which documents and references can be shared * Works as a Firefox extension or as a stand-alone version with a connector to Chrome, Safari, and Opera | * Only 300MB of storage is available for free | * Basic software is free but charges for additional storage |
| Mendeley | * Includes a desktop and web version compatible with multiple web browsers (Internet explorer, Firefox, Chrome, and Safari) * 2GB of free cloud storage | * Only able to create one private group/invite-only public group with three group members to share references and documents or an unlimited number of public groups to share only references | * Basic software is free but charges for additional storage and for collaborating with larger groups |

Files can then be placed into specific folders and marked as read/favourited/reviewed; see these quick-start guides for [Mendeley](https://www.mendeley.com/guides) and [Zotero](https://www.zotero.org/support/quick_start_guide) for further information.

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| **Top tip:**  ***Download citation from website***  Both Mendeley and Zotero support a plug-in to save references found online directly to their libraries. [Zotero Connector](https://www.zotero.org/download/) or [Mendeley Web Importer](https://www.mendeley.com/reference-management/web-importer) will allow the user to save the metadata for a given reference, download the full-text PDF (if allowed), and attach useful links/supplemental data to the Mendeley or Zotero libraries (as shown below).  Mendeley    Zotero (To note, the icon will change depending on the website/ source)    ***Example from Grenada national ecosystem assessment***  Two local data collectors were hired to collate data from Grenadian Ministries, agencies, and projects, i.e., materials that were not readily available online. Work continued to design and populate a Zotero database, used for data storage and document referencing by assessment authors. An expanded Dropbox package was purchased and populated with a) backups for the Zotero database, b) GIS and other data types that cannot be stored in Zotero, c) author CVs, d) webinar recordings, and e) other information as needed. For more information, please visit: [*Capturing Lessons Learned From National Ecosystem Assessment – Volume 2: Stages Of The Assessment*](https://www.ecosystemassessments.net/resource/capturing-lessons-learned-from-national-ecosystem-assessment-volume-2-stages-of-the-assessment/)*.*  ***Top tip: Word processing Plugins***  Mendeley and Zotero also feature plugins for Microsoft Word and LibreOffice. This can contribute to the consistent use of in-text citations, automatically generate bibliographies, and easily change referencing style. See the guides on how to install and use these plugins: [Mendeley](https://www.mendeley.com/guides/using-citation-editor) and [Zotero](https://www.zotero.org/support/word_processor_integration). |

# ADDITIONAL Resources

**Mendeley** **resources**

* Guides for using Mendeley: <https://www.mendeley.com/guides>
* Download Mendeley: <https://www.mendeley.com/download-desktop-new/>
* Download Mendeley Web Importer: <https://www.mendeley.com/reference-management/web-importer>
* Using Mendeley with Microsoft Word: Mendeley Plugin guide: <https://www.mendeley.com/guides/using-citation-editor>

**Zotero** **resources**

* Quick start guide for using Zotero: <https://www.zotero.org/support/quick_start_guide>
* Download Zotero Connector: <https://www.zotero.org/download/>
* Using Zotero with Microsoft Word: Zotero Plugin guide: <https://www.zotero.org/support/word_processor_integration>
* Guide for synchronizing Zotero with Dropbox: <https://libguides.princeton.edu/c.php?g=148292&p=972572>

**Dropbox** **resources**

* Dropbox. 2022. Guide for using Dropbox: <https://help.dropbox.com/guide>
* Guide for synchronizing Zotero with Dropbox: <https://libguides.princeton.edu/c.php?g=148292&p=972572>