Reference Management

Column Editor: Tracy Kent; e-mail:
t.k.kent@bham.ac.uk

So you have finally decided on the package see my checklist) which meets your users requirements ….. what next? How does an Information Service support the introduction of reference software? Whichever package you choose there are a number of support issues common to all. Here are just a few…

1. How will you promote the software?
One of the difficult things about reference management software is that users are often not aware what it is and how it can help them. Outlining the added value of this software – whether to individual researchers, specific departments or library "champions" is necessary if your users are to invest time and energy into utilising the software effectively.

Most Information Services provide seminars and training at both introductory and more advanced stages of the software. At the University of Birmingham, for example, they offer a basic : introduction to reference management software : endnote and reference manager compared (see www.istraining.bham.ac.uk), followed by three hours sessions on the individual packages (*Endnote* and *Reference Manager*) giving users an opportunity for hands on and asking questions. The basic introduction is necessary as many users are unclear about the features of the software.

The more advanced sessions concentrate on organising references, connecting and downloading, importing and outputting references (the sort of programme you will find on a UKOLUG reference management day!). These sessions are carried out by the subject librarians. This is quite typical and other examples of training in different software packages can be found at Kings College, London,(www.kcl.ac.uk) Loughborough www.lboro.ac.uk/library/dbase/Refworks.html) and the University of Brisbane (www.library.uq.edu.au/faqs/endnote). More examples are available on the UKOLUG website. You might also find a paper by East, John W. 2001. Academic libraries and the provision of support for users of personal bibliographic software : a survey of Australian experience with Endnote. *LASIE* (April) 64-70 interesting as he outlines examples in Australia.

As the training becomes embedded, training is often then extended to other groups of users (say undergraduates or support staff) or to specific academic groups (say Sociology researchers). This enables the sessions to be more tailored as subject specific import filters and output styles can be demonstrated. Several institutions train library support staff at different enquiry points to help increase awareness and to answer some basic queries about the software (such as how do I download from web of science?). This is an additional investment in the software.

Whatever training is provided it must be clear to the users why they would want to invest their time and energies in the software and the added value that this will bring them.

2. Is there to be a supporting website with documentation and frequently asked questions?
Most Information Services websites make reference to how to prepare and quote references appropriately and so it seems the next logical step to extend the usefulness to links to this type of software. Further, this can provide links to documentation (hand outs, contact details, etc), a frequently asked question type page and the list of appropriate import filters. The software companies themselves will provide FAQs as well as comparison and compatibility charts which can be very informative. An example would be Birmingham at www.i-cite.bham.ac.uk with more on the UKOLUG website which also houses the fact sheets!

The key here is maintenance, maintenance, maintenance. Whatever website you create it must be kept up to date with appropriate filters, documentation for the latest upgrade and accurate contact details.

3. Who will provide Import filter information?
The most difficult area in providing support for reference software is identifying appropriate import filters (the translation files for external databases) for in-house databases. This is made more difficult as database providers change the way the data is structured (see *PudMed* as an example www.pubmed.gov). But who will provide these – library or IT staff? In many cases it is the individual subject staff who are most familiar with the database structure so seem to be the most logical providers of the filters. The *I-cite* guide at the University of Birmingham is one example of how this can be done (www.i-cite.bham.ac.uk) with others listed on the UKOLUG website. The software producers are good sources of information on the import filter (see their webpages) but maintenance of the correct import filters is on-going. With some databases (such as *Cambridge Scientific Abstracts*) there is provision for downloading into their own unique reference software, *RefWorks* (www.refworks.co.uk) which cuts out this area.

What is often required is the inclusion of checking filters built into the trial ling and acquisition of databases within an institution to check for compatibility. Are procedures in place for this?

4. Who will join or make available Mailing Lists Support?
Key support staff would find it useful to join the various associated mail lists on the software to keep up to date with new developments, products, import filters, output styles, etc. The archives of previous messages can be

particularly useful for answering elusive queries. Contact instructions are available from the UKOLUG pages. Should there be a key contact for alerting staff to appropriate changes or is it up to individual staff? http://www.ukolug.org.uk/content/public/links/refmanlinks.html#discuss .

You might even want to consider setting up an internal mail list to keep your users up to date with filter changes, software upgrades or new products such as *RefViz* (an add-on to *Endnote*). Most software companies also provide email notices of upgrades, new products, etc so check if there is a useful one for your product. A good example is that from *AdeptScience* (www.adeptscience.co.uk) or *ResourceMate* (www.resourcemate.com).

5. Who will provide direct user support?
When users run into difficulties how can they be supported? They might want to telephone the help desk (is this the library or the IT desk or a named individual?); email (again is this IT or library email addresses or to their subject representative?) or visit in person?

What is clear is that, having introduced the software, the hard work really starts as users begin to request specific help with exploiting the software. Once this happens it makes the building of a frequently asked questions page all the more necessary!

6. How will you ensure the software stays relevant?
How will you obtain and encourage feedback on the software once it is in place? Are questions asked during Annual Surveys or via Suggestion forms? How will you keep informed about developments in the reference software market? How will you keep users up to date as well? There are several links on the UKOLUG website which might be of interest including the *Scholarly Electronic Publishing b ibliography* http://www.ukolug.org.uk/content/public/links/refmanlinks.html#uptodate

The most important lessons to be learnt in implementing bibliographic software are that the significant time commitment of staff and the willingness to collaborate with your users in developing innovative applications yield their own rewards : no matter which package you choose!

Software updates
WriteNote 1.6 is available and now works with a wider range of web browsers and platforms including Macintosh and Linux. More importantly, the software now allows formatting of papers with in-text citations on most word processors without the need for a plug in. A great improvement! The software also implements Unicode support to provide researchers with a standardised means of interchanging, processing and displaying the written text of most languages. *WriteNote* is sold as an annual, unlimited site-wide

CHEST subscription to academic Institutions. The *AdeptScience* website also provides a list of universities and colleges who have previously requested trials. Further details from www.adeptscience.co.uk

Public Sector News
Column Editor: Penny Garrod, Public Library Networking Focus, UKOLN. p.garrod@ukoln.ac.uk

Museums, Libraries and Archives news

From *Resource* to *MLA* – change of name for Government body
Resource: the Council for Museums, Libraries and Archives issued a bulletin in January 2004 announcing that the word 'Resource' was to be dropped and in future they would be known as the Museums, Libraries and Archives Council (MLA). This brings the national body in line with the regions i.e. the nine Regional Agencies (except London) are 'Museums, Libraries and Archives Councils' prefixed by two letters designating the region they represent e.g. 'SEMLAC' is the South East Museum, Libraries and Archives Council, and SWMLAC is the South West Museums, Libraries and Archives Council etc.

Curriculum Online Roadshow

MLA is collaborating with the Department for Education and Skills (DfES) as part of an initiative to encourage the cultural sector to make their eLearning resources available through Curriculum Online. http://www.curriculumonline.gov.uk

A series of Curriculum Online Roadshows will be held at Regional Agency offices throughout England, starting with Newcastle (NEMLAC) on 4 March and finishing with Taunton (SWMLAC) on 26 April. These events aim to explain the educational and policy context behind Curriculum Online, and provide practical examples from pilot sites. Further information and bookings will be available from Regional Agencies - contact details can be found on the MLA website at: http://www.resource.gov.uk/action/regional/regionsmap.asp

Chief Executive of MLA gives keynote speech at international conference in Canada

A conference entitled: *Beyond Productivity: Culture and Heritage Resources in the Digital Age* attracted experts from around the world to Calgary, Canada on 26-27 February 2004. The event was organized by the Canadian Heritage Information Network (CHIN) in collaboration with its departmental partners, Canadian Culture Online Program (CCOP) and eCulture. Chris Batt, Chief Executive of MLA, provided the keynote speech on the first day, and the event was broadcast