

A Practical Guide to

Reference Management AI Tools

A comparison of Zotero, Mendeley, EndNote, Paperpile, and Open Knowledge Maps, with key features and practical uses for research and academic writing.

Med Kharbach, PhD

www.medkharbach.com

www.educatorstechnology.com

Introduction

Having a good reference manager is a must when you work with research. It can save you hours of work and a great deal of hassle. I learned this the hard way, and I wish someone had given me this advice when I was doing my PhD a decade ago. The time I spent verifying, formatting, and managing references for my doctoral work felt just as demanding as the research itself. And no, this is no exaggeration.

Several established reference managers now include AI capabilities, extending what you can do with the papers in your library. Depending on the tool, you can ask questions about a PDF, compare studies, or locate relevant material across saved sources. These features can help you find passages to examine more closely, though you still need to check the answers against the original papers.

If you have not yet settled on a reference manager, this guide brings together some of my top picks. I am not affiliated with any of these tools. My selection draws on my experience using them at different points in my research and writing. I currently use Zotero because I find it practical for the work I do, but your choice will depend on your writing software, budget, and research needs.

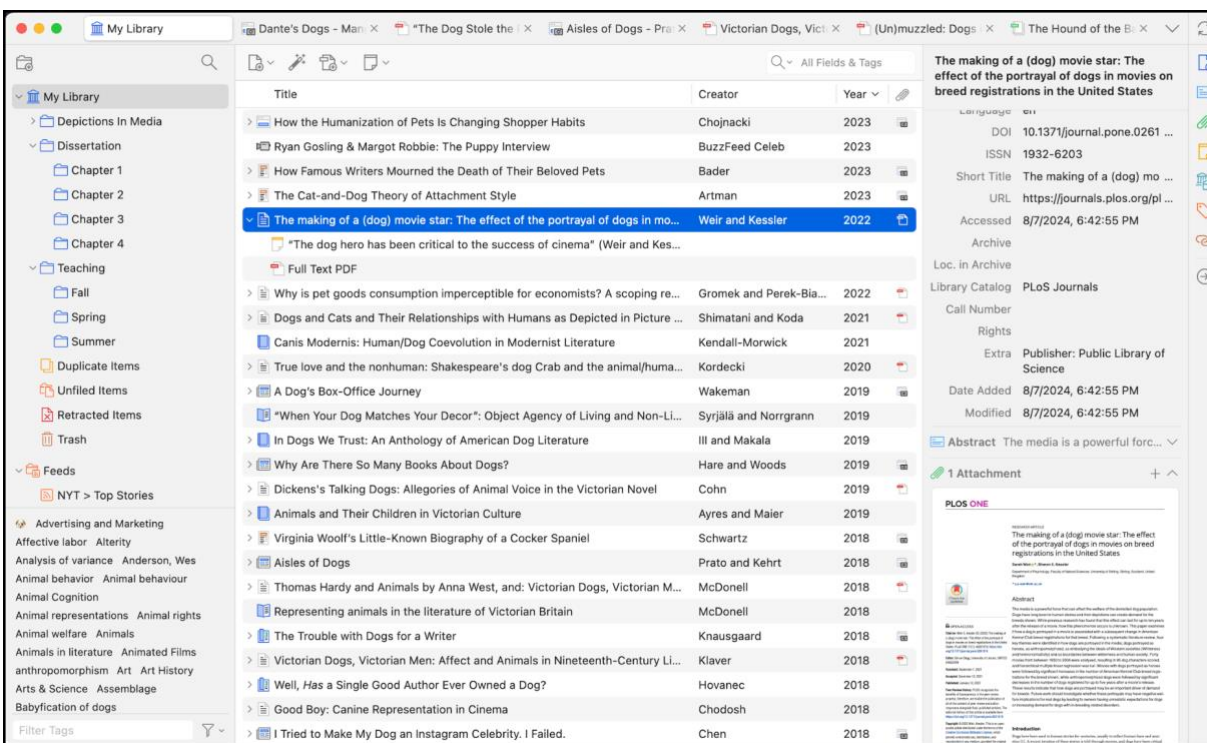
In general, reference managers can help you collect sources, organize PDFs and reading notes, insert citations as you write, and update your bibliography as a manuscript develops. I have also included Open Knowledge Maps, a research-discovery tool that helps you explore a topic visually. The comparison below gives you a starting point, followed by each tool's main features and how it can help in research.

Comparing the tools

Tool	Main role	Writing integration	Access
Zotero	Reference management	Word, LibreOffice, Google Docs	Free; paid attachment storage
Mendeley	Reference management and AI reading	Microsoft Word	Free; paid storage and AI plans
EndNote	Reference management and publishing support	Word and Google Docs	Paid; institutional options and trial
Open Knowledge Maps	Visual topic discovery	No citation-writing integration covered here	Free public search
Paperpile	Browser-based reference management	Google Docs, Word, BibTeX	Annual subscription; trial

Zotero

Zotero is a free, open-source reference manager from a nonprofit organization. It keeps bibliographic records, PDFs, annotations, and notes together, making it useful for maintaining a research library across projects. Read [Zotero full review](#).



Features

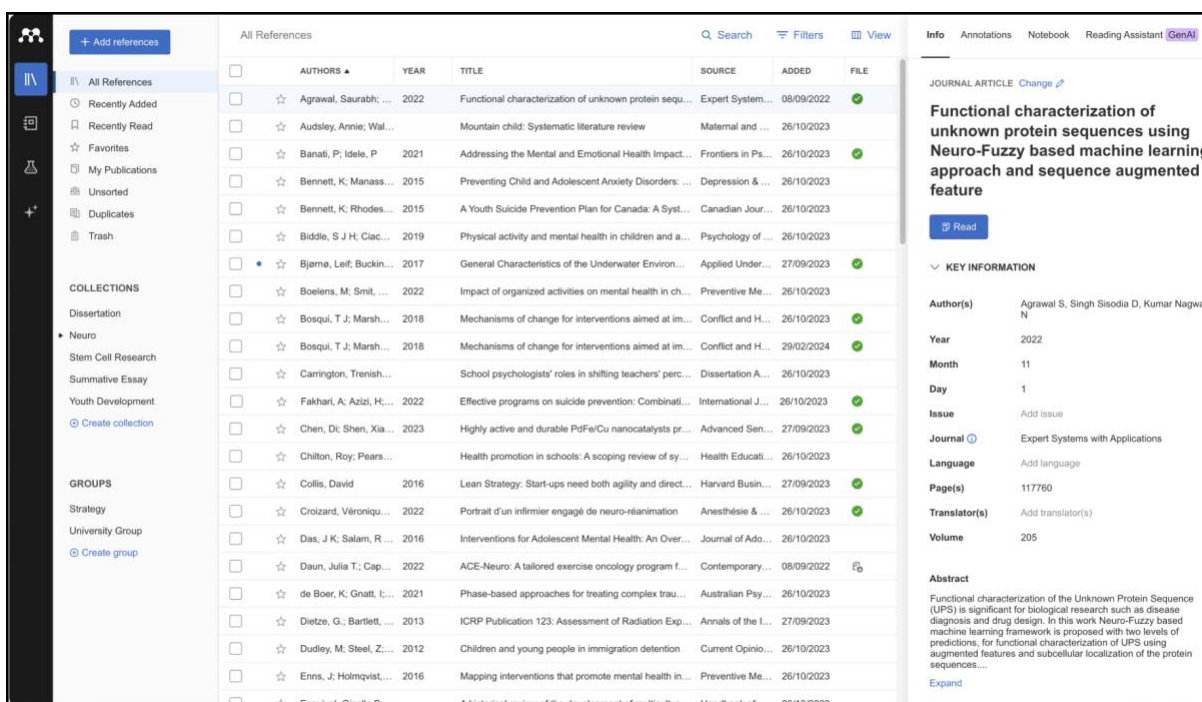
- Save references and accessible PDFs with the Zotero Connector.
- Add records by DOI or ISBN and import RIS or BibTeX files.
- Organize sources with collections, subcollections, tags, and saved searches.
- Annotate PDFs and create notes with links back to source pages.
- Insert linked citations and bibliographies in Word, LibreOffice, and Google Docs.
- Share group libraries, merge possible duplicates, and optionally sync across devices.
- Sync library data free; online attachment storage has a separate allowance.

How it can help in research

- Build a literature-review collection and label sources by topic, method, and reading status.
- Keep evidence beside your interpretation, questions, and methodological concerns.
- Refresh linked citations and the bibliography during manuscript revisions.
- Coordinate reading through a group library with agreed tags and collection names.
- Retain checked sources and reading notes for future articles and research proposals.

Mendeley

Mendeley is Elsevier's reference manager for storing, organizing, reading, and citing sources. Reference Manager holds the library, Web Importer collects sources, and Mendeley Cite connects references to Word. Its newer AI tools support exploring saved PDFs. Read [Mendeley full review](#).



Features

- Import PDFs, folders, and references from the web; use Watched Folders for automatic importing.
- Organize sources with collections, tags, Favorites, and recent-reading views.
- Highlight and annotate PDFs, and gather thoughts in Notebook.
- Insert citations and generate bibliographies in Microsoft Word with Mendeley Cite.
- Share references and annotate PDFs through groups; sync library changes to the cloud.
- Use Reading Assistant for paper questions, Compare Experiments for up to ten PDFs, and Ask My Library for cross-library questions.
- Free access includes 2 GB storage and five Reading Assistant questions; broader AI access depends on the paid plan.

How it can help in research

- Create collections for a literature review and distinguish theoretical, empirical, and methodological sources.
- Write annotations explaining how evidence connects to your argument.
- Manage references while drafting in Word and check the final bibliography.
- Agree on a shared reading routine for a research team.
- Use AI responses to locate material for closer reading, then verify the cited passages.

EndNote

EndNote is Clarivate's reference-management tool for collecting sources, organizing full-text materials, and preparing citations. EndNote 2025 adds AI-supported PDF reading and publication-discovery functions to its desktop and connected web tools. Read [EndNote full review](#).

Announcement

EndNote 2025 just got even better — meet EndNote Research Assistant!

Discover new, intelligent ways to power your research with EndNote 2025, including EndNote Web.

In addition to features that streamline citation and help you explore the research landscape from your library, EndNote 2025 now offers the AI-powered EndNote Research Assistant.

Transform your documents into an interactive experience with the help of AI. Understand a paper faster through natural conversation and unlock global knowledge with document translation. Enjoy all the features of EndNote 2025 and assemble your work with precision and speed.

[Learn More](#)

or contact our team at endnote.sales@clarivate.com



Chat with a document
Ask questions in plain language and AI delivers answers from text

Features

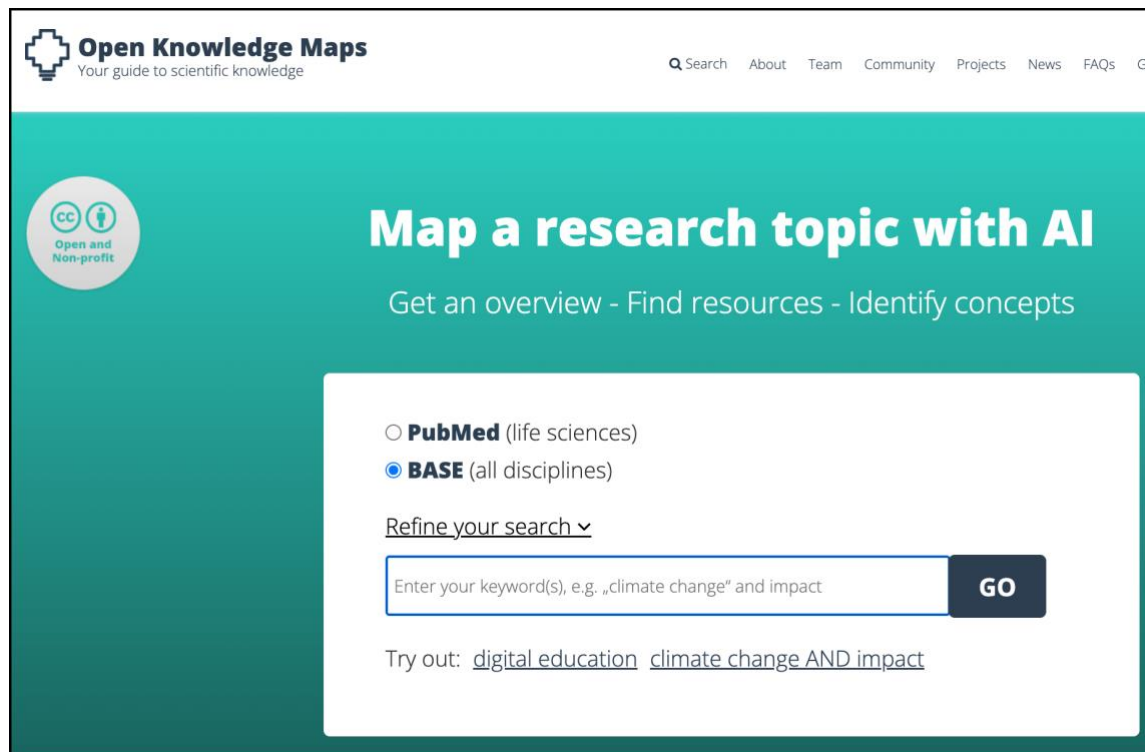
- Import database exports, retrieve references through supported searches, and attach PDFs.
- Organize records with groups, smart groups, and tags.
- Find possible duplicates with adjustable matching criteria.
- Search and annotate PDFs using highlights, underlining, and sticky notes.
- Use Cite While You Write in Word and Google Docs; insert quotations with corresponding citations through Cite from PDF.
- Retrieve reference updates and look for available full text.
- Use Research Assistant to question, summarize, or translate attached PDFs.
- Explore Web of Science citing articles and related records with a subscription; use Find a Journal for publication suggestions.

How it can help in research

- Organize database search results into a working literature-review library.
- Check incomplete records and record duplicate-removal decisions when required by the review method.
- Keep notes on a study's question, methods, findings, and limitations beside its PDF.
- Maintain citations as a manuscript develops and apply the required journal style.
- Use AI reading aids and journal suggestions as starting points for your own evaluation.

Open Knowledge Maps

Open Knowledge Maps is a nonprofit, open-source research-discovery platform. It creates interactive topic maps from research metadata, helping us explore an unfamiliar area and develop more focused searches. It groups topics rather than citation relationships. Read Open Knowledge Maps full review.



Features

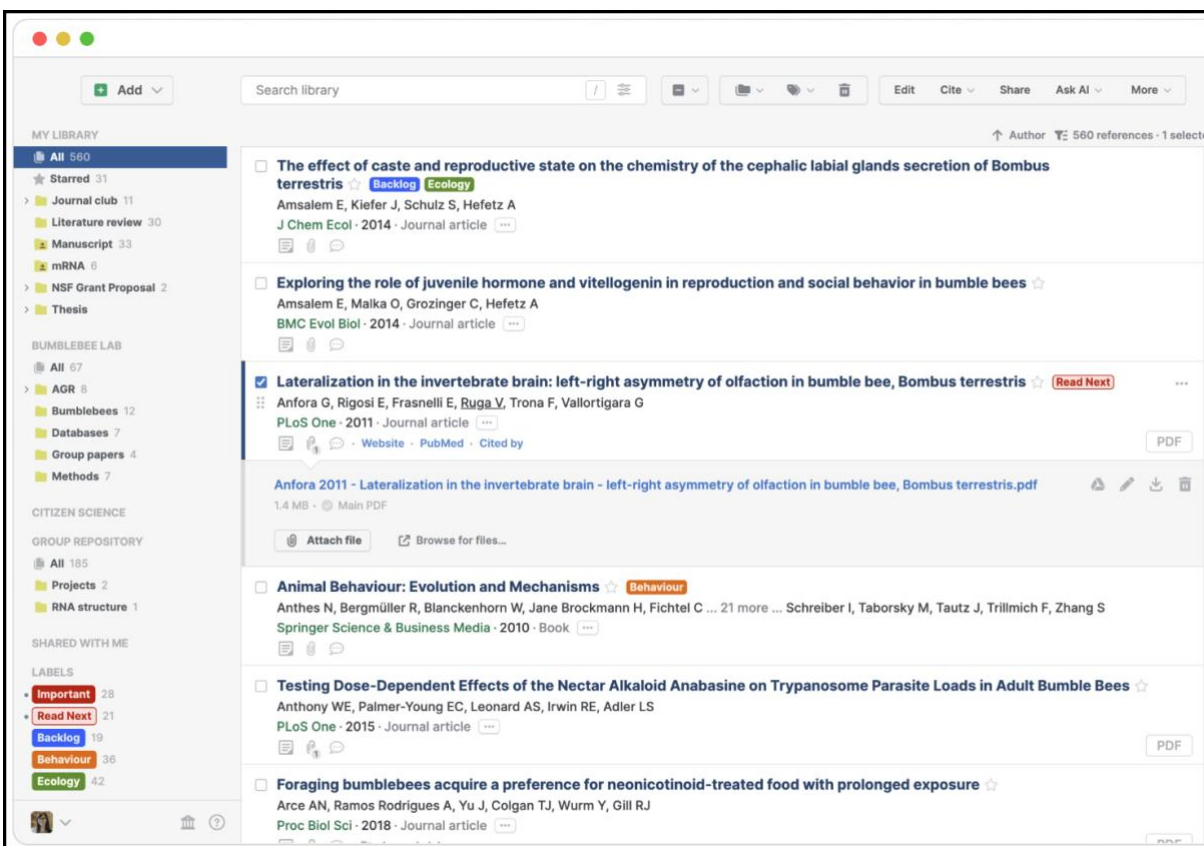
- Create visual overviews with related resources grouped into topic areas.
- Use area labels to identify concepts and develop search vocabulary.
- Explore research outputs through BASE, including publications, datasets, and software.
- Identify highlighted open-access resources and follow links to available full text.
- Build maps from metadata such as titles, abstracts, and subject keywords.
- Explore the top 100 results from the selected source, as described in the FAQs.
- Use the free public search and introductory training materials.

How it can help in research

- Get oriented before choosing databases and developing a literature-search strategy.
- Record useful keywords from labels and paper records, then test them in further searches.
- Narrow a broad interest by examining promising topic areas.
- Compare maps from different keyword combinations and document how results change.
- Bring a map to a research meeting to discuss possible directions for reading.

Paperpile

Paperpile is a subscription reference manager with a browser-based library, mobile apps, and citation tools for Google Docs and Word. It connects collecting papers with organizing, reading, and citing them, and supports BibTeX workflows. Read Paperpile full review.



Features

- Save sources through a browser extension and import PDFs, RIS, BibTeX, DOI lists, and pasted references.
- Find available PDFs and support institutional access where configured.
- Organize sources with folders and labels; detect duplicates and complete missing metadata.
- Generate citations and bibliographies in Google Docs and Word.
- Use Expert for full-text PDF search, annotations, shared libraries, and advanced integrations.
- Export reference records and, with supported annotation functions, notes in Markdown.
- Use the beta Ask AI integration to send selected PDFs and prompts to an external assistant through your existing account.
- Access Regular or Expert through annual billing; a 30-day trial and eligible academic discounts are available.

How it can help in research

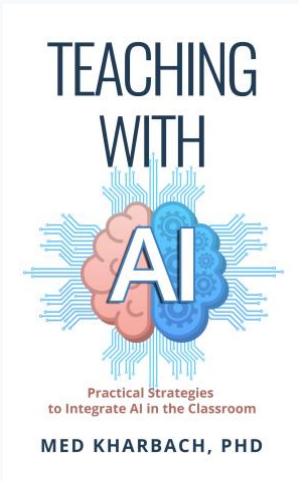
- Save and organize references as your project search develops.
- Prepare reading notes on each paper's purpose, method, findings, and relevance.

- Insert citations while co-authors draft in Google Docs or Word.
- Maintain a shared reading library through Expert.
- Use an approved AI assistant for bounded paper questions and verify answers against the sources.
- Export records when moving to another tool or preparing a BibTeX workflow.

AI Disclosure Statement

AI tools (namely Claude and ChatGPT) were used for limited editorial support in the preparation of this guide, including language clarity, synthesis, and stylistic consistency. I retain full responsibility for all content and claims.

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