

TechMatters: “Qiqqa” than you can say Reference Management: A Tool to Organize the Research Process

Krista Graham, Georgia State University

Perhaps you are a Mendeley user searching for an alternate reference management tool given the news about that tool’s purchase by Elsevier (<http://blog.mendeley.com/start-up-life/team-mendeley-is-joining-elsevier/>)? Or maybe you are a current EndNote user searching for an alternative with a gentler learning curve? Or possibly you are a happy Zotero user in need of a few additional features, such as the ability to perform OCR on PDF images? Or you might just be a newcomer to the world of reference management software looking for a usable tool to use yourself or recommend to students? Whatever the case, if you are in the market for a new tool to organize, manage, and work with your collection of research sources, you may want to take a look at Qiqqa (think “quicker”, but with a British accent).

Developed by Cambridge University doctoral student James Jardine, Qiqqa is designed specifically to meet the needs of students, researchers, academics, and educators. According to the Qiqqa manual (<http://www.qiqqa.com/Content/Client/The Qiqqa Manual.pdf>), its goal is to help with most aspects of the academic research process including “searching, finding, reading, commenting, highlighting, annotating, tagging, cross-referencing, exploring, discovering, brainstorming, sharing, writing bibliographies” and more. With so many features, we won’t be able to cover everything in this article, but let’s check out some of the major ones together and then you can continue to explore on your own.

Getting Qiqqa

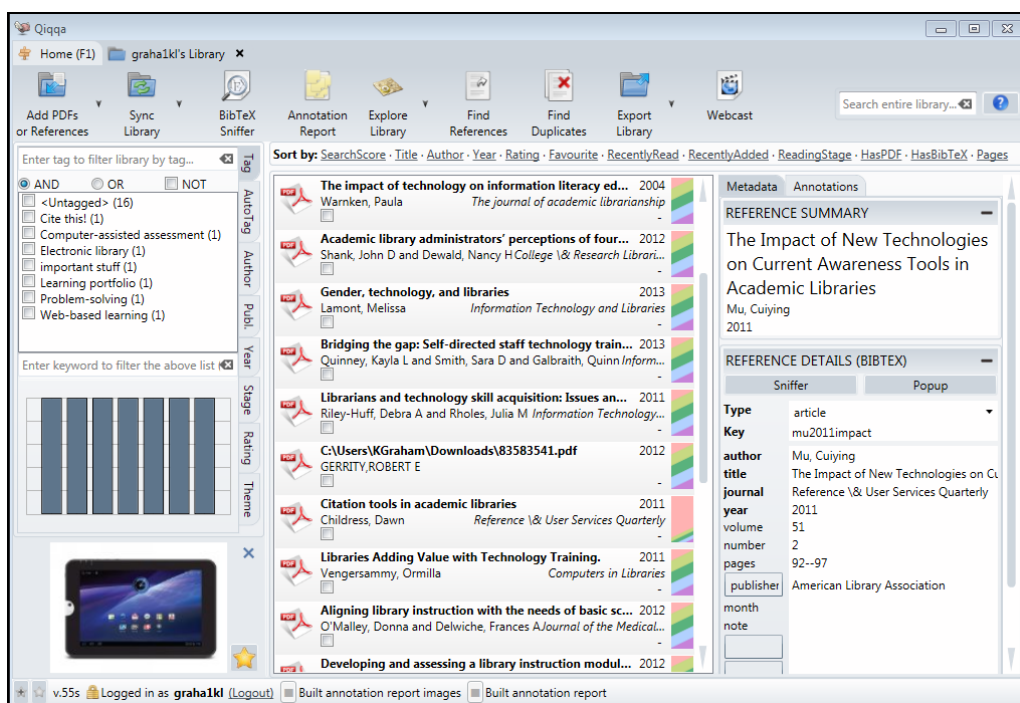
In order to use Qiqqa you do need to download and install a copy of the free software application, which is currently only available for the Windows and Android platforms. Although you can test drive the application without logging in, you will need to create a free account (<http://www.qiqqa.com/Account/Register>) if you want to maintain multiple “libraries” of information and share them with colleagues and/or friends.

Collect and Organize

The first stage in the research process generally involves identifying and collecting what can quickly become a large number of articles on a selected topic. Qiqqa aids in this process by allowing you to save copies of PDFs, along with their descriptive metadata, into “libraries”. You can also include citations without attached documents which Qiqqa refers to as “non-PDF references”.

By default, the application is setup with one main user specific library, along with a generic “guest” library that you can use for testing purposes before setting up an account. Once you have an account, however, you can setup as many separate libraries as you need to keep your work segmented and organized.

Figure 1: View of a Qiqqa “library” containing saved PDFs and reference information for selected articles.



There are a variety of methods to add items to a library including selecting a file or whole folder from within Windows Explorer; dragging and dropping a file into the list pane; importing from another program (e.g., EndNote, Zotero, Jab Ref, Mendeley or any program that exports to BibTex format); or by manually typing citation information into a template. You can also designate a “watch folder” on your computer so that when new PDF files are added there, they are automatically imported into Qiqqa

When PDFs are first added to a library, they often contain very minimal metadata (see the sixth reference in Figure 1 which includes only an author name and year of publication along with a cryptic file name). You can either manually add additional descriptive metadata into the “Reference Details” pane, or you can use the “Sniffer” feature to have Qiqqa search for the reference in Google Scholar and then automatically import the associated metadata. Once added you can search your libraries and filter the results using any of your stored metadata elements.

Of course, if at some point in the future you were to decide to switch to a different tool, you have the option to export your libraries in BibTex format to be easily ported to another system.

Read and Understand

Qiqqa has a built-in OCR feature that works to ensure that imported articles are full-text searchable and attempts to identify abstracts and appropriate keywords. Of course, if automatic extraction fails to produce suitable results you can always override it and enter the appropriate content yourself.

When viewing the PDF of an item, the “Annotations” tab provides fields where you can add your own tags, comments, and annotations for each item. You can also add notes directly onto the document using colored highlighter tools, inline “sticky note” style annotations, and even free-hand comments (most useful if you use a stylus as an input device rather than a mouse). In addition, you can add up to nine bookmarks within a particular document to provide easy access to sections you want to find again quickly.

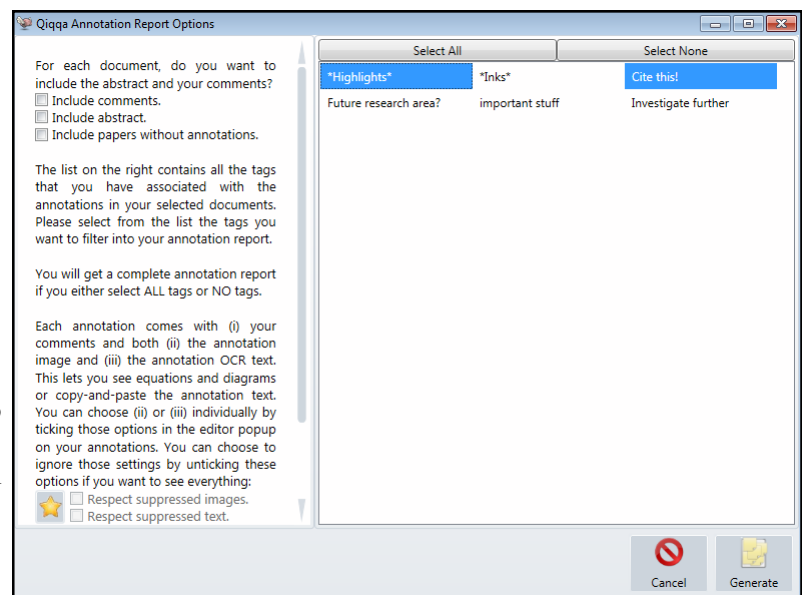
Depending on the size of the research project that you are conducting, your collection of resources may be significant and the number of annotations that you have inserted into documents quite large. Fortunately, Qiqqa comes equipped with a powerful tool called the “Annotation Report” that allows you to leverage the metadata you add to your articles and find and revisit your annotations across all documents.

The “Annotation Report” feature is accessed from the menu ribbon on the library level. Before selecting this option, make sure to first select the items that you want to in-

clude in the report; you can select one article, a collection of articles, or the entire library. If you don’t select any PDFs on the library screen, then the generated report will include annotations for all items in the library by default.

Upon selecting the “Annotation Report” option, you will be presented with the “Annotation Report Options” box. Here you can select the specific tags and/or types of notes that you want to include in the report (see Figure 2). In the example below, I have requested the inclusion of all places that I highlighted, along with notes where I have added the tag “Cite this!” I have also asked that the report include any comments that I have added and the abstract for article (if available).

Figure 2: Annotation Report Options



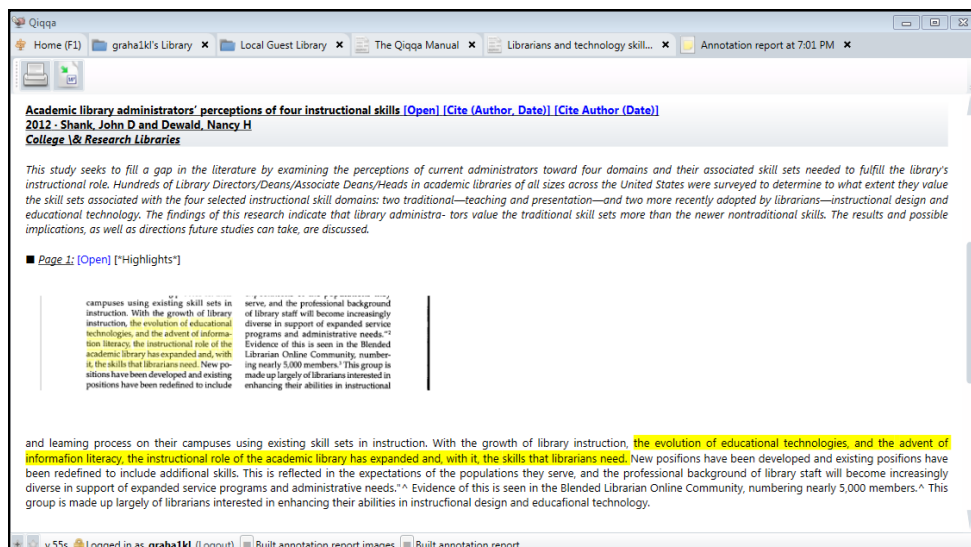
An example entry from the resulting annotation report is shown on the next page (see Figure 3). As you can see, the report entry includes the available citation information for the article, the abstract, an image snippet from the article showing a “note” in context, as well as the OCR text version of the same note for copying and pasting if desired.

Write and Produce

When you are ready to move into the final stage of the research process—writing—you can use Qiqqa’s integrated “InCite” tool to quickly and painlessly add references to your Microsoft Word documents and create a bibliography formatted in the citation style of your choice. Qiqqa does provide an option to “Export BibTex” of library items for use into other systems that may work with alternate word processors, but doing so is tricky and a better option is probably to choose an alternate reference manager optimized to work with your writing software of choice.

If you are a Word user, however, “InCite” is very easy

Figure 3:
Entry from an Annotation Report generated with the options from Figure 2



to use. You don't need to install any extra plugin into Word; simply open a new document, along with the Qiqqa "InCite" window, and begin typing as usual. When you are ready to add a reference, choose a citation from your library and press the "add citation" button (see Figure 4). Qiqqa will insert a "citation-cluster placeholder" into your document. To convert this to a more familiar style you select your "citation style" and then press the "Reformat Document" button in Qiqqa. You can then continue adding citations and formatting them as you continue to write.

Adding a bibliography is just as simple. When you are ready, add a section heading and then press the "Add Bibliography" button to insert the bibliography placeholder. Next use "Reformat Document" and properly formatted citations in the style of your choice should appear in your document. If at any point you wish to change citation styles, simply use "Pick CSL Style" to choose a new format and once again use the "Reformat Document" button.

In Conclusion

In addition to the features outlined in this article, Qiqqa also offers a number of tools to aid in brainstorming and information sharing with collaborators. A full discussion of these options is beyond the scope of this article; however, they are well documented in the manual that is included in the "guest" library that come with initial download of the software.

Whether searching for a means to organize your own research process or seeking a tool that you can recommend to students, Qiqqa is most certainly a solid option. Obviously, Qiqqa is just one of many software options in the territory of reference and research management (for a list of other options see http://en.wikipedia.org/wiki/Comparison_of_reference_management_software), but for those Windows/Word users looking for a free, independent (for the time being), and relatively easy to learn application, it is certainly worthy of consideration.

Figure 4:
Word document (right) with in-text citation and bibliography produced by Qiqqa's InCite tool (left).

