Reference Management Using Zotero

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Outline*

- Background and installation (~10 min)

- Adding items (~15 min)

- Organization (~15 min)

- Citing and writing (~15 min)

- Syncing and collaborating (~15 min)

- Questions and wrap-up (~10 min)

* Adapted from
  - http://zoteromusings.wordpress.com/agenda-for-a-one-day-advanced-zotero-workshop/
  - https://www.zotero.org/support/start

Outline

- **Background and installation (~10 min)**
  - **Features to consider for reference management**
  - **Background and history on Zotero**
  - **Installation and setup**
- Adding items (~15 min)
- Organization (~15 min)
- Citing and writing (~15 min)
- Syncing and collaborating (~15 min)
- Questions and wrap-up (~10 min)

Reference Management Tools

Important Features to Consider

- Cloud storage/synchronization
  - Where does my data live?
- Group collaboration
  - Can I share my library with others?
- Workflow integration
  - Does this work with my paper writing process?
- Cost and licensing
  - How much will this cost me?
- Support and community
  - Where do I go for help?

Zotero Features

- Cloud storage/synchronization
  - First 300MB free
- Group collaboration
  - Yup
- Workflow integration
  - Extensions + connectors for browsers, Word, & more
- Cost and licensing
  - Libre & Gratis – Open Source (AGPL)
- Support and community
  - Actively maintained for PC, Mac, & Linux

Background

- **zotëro-j** [zɔtərɔj] – master, acquire
  - Random search through secondary languages to find sticky but unique name – Albanian, in this case
  - Common tradition from other open-source projects: Wiki (Hawaiian), Ubuntu (Bantu), Ushahidi (Swahili)

- Produced by Center for History and New Media at George Mason University
  - Dan Cohen, Josh Greenberg, & Dan Stillman
  - Support from Mellon & Sloan Foundations, user fees

Background – History

- Version 1 released in October 2006
- Sued by Thomson Reuters in 2008 for making it possible to import/export Endnote styles
  - Dismissed in 2009, appeal withdrawn in 2011
- On-going active development
  - Version 2 released in February 2010
  - Version 3 released in January 2012
  - Version 4 released in April 2013

Get it!

https://www.zotero.org/

- If you only use Firefox:
  - Zotero for Firefox
- If you use a mix of Chrome, Safari, or Firefox:
  - Zotero Standalone

Basic ontology

- Items
  - Contain attachments (PDF, JPG, HTML, Tags, Notes)
  - Customizable metadata fields
- Collections
  - Contain items or other collections
- Groups
  - Belong to one or more people
  - Contain collections

Outline

- Background and installation (~10 min)
- **Adding items (~15 min)**
  - **Via web tool**
  - **Via identifier**
  - **Importing from other formats**
- Organization (~15 min)
- Citing and writing (~15 min)
- Syncing and collaborating (~15 min)
- Questions and wrap-up (~10 min)

Adding via web tool

- Make sure Zotero is open and in the collection you want to catch incoming items

- Navigate to a scholarly web resource
  - JSTOR, NEU Library, Amazon, etc.

- Click on item or collection icon in URL bar

- Be amazed at the sorcery!

- Go back to Zotero to review

Adding via identifier

- Click the magic wand at top
- Enter identifier
  - ISBN, DOI, PMID, etc.
- Add PDFs, images, webpages, etc. manually beneath new item

Adding via drag-and-drop

- Drag a PDF, JPG, etc. from folder into Zotero
- For PDFs, attempt to "Retrieve Metadata" to automatically populate citation fields and create a parent item
  - Careful not to over-do this or you'll hit API limits!
- For other file formats, create a parent item and enter citation field information manually

Adding via import

- Zotero can import from many other bibliographic file formats
  - MODS, BibTeX, RIS
  - File > Import
- EndNote requires more work:
  - https://www.zotero.org/support/kb/importing_records_from_endnote

Adding manually

- Worst case scenario if everything else breaks!

Outline

- Background and installation (~10 min)
- Adding items (~15 min)
- **Organization (~15 min)**
  - **Collections**
  - **Tags**
  - **Searches**
- Citing and writing (~15 min)
- Syncing and collaborating (~15 min)
- Questions and wrap-up (~10 min)

Creating collections

- Items can be grouped into topical collections
- Items can belong to multiple collections without duplication
- Collections can contain other collections
  - Items added to sub-collections do not appear in parent collection… unless "recursive collections"
- "My Library" is the root collection containing everything across all non-group collections

Using tags

- Tags can be used to classify papers without collection ontology

- Tags selector/navigator pane located in lower left
  - Select one or more to sub-sample

- Tags can be manually added in the right pane under "tags"

- Tags can be colored and relabeled globally by right or control clicking on the tag

Searching

- Search can look through just "Title, Creator, Year", "All Tags", or "Everything"

  - Like Evernote, text of documents can be searched with PDF indexing in preferences

- Advanced search can let you perform searches with filters, wild cards, etc.

- Advanced searches can also be saved as a pseudo-collection which are continually updated

Sorting

- Fields in the center panel can be sorted by properties
    - Title, Author, Date, Journal, etc.
- Properties can be added or removed by clicking the sort icon to the right of column headers

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- Background and installation (~10 min)
- Adding items (~15 min)
- Organization (~15 min)
- **Citing and writing (~15 min)**
  - **Drag & drop bibliographies**
  - **Word processor plugins**
- Syncing and collaborating (~15 min)
- Questions and wrap-up (~10 min)

Drag & drop bibliographies

- Select items from center panel
- Hold shift to select continuous items, control to select non-continuous items
- Drag into another window to auto-generate bibliography entries
- Drag while holding shift to auto-generate in-line citations
- Check settings for "Quick Copy" under preferences to change citation style

Word processor plugins

- Create dynamic bibliographies à la EndNote
  - Insert new citation from library or change item in library and bibliography (should) automatically update

Export bibliographies

- "Create bibliography" from collections or selections of items
  - Export to RTF, HTML, or clipboard
- "Export bibliography" from collections or selections of items
  - Useful for formats like BibTeX to create bibliography file
  - Migrate library to other formats for colleagues to read…if they're not Zoterians :)

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- **Syncing and collaborating (~15 min)**
  - **Syncing to Zotero drive, Dropbox, etc.**
  - **Setting up & maintaining groups**
- Questions and wrap-up (~10 min)

Syncing to Zotero drive

- Create account on Zotero.com
  - First 300 MB free! But $60/year buys 6 GB
- Input credentials into "Sync" within preferences
- All attachments, notes, items, collections in library and changes to them are synchronized to "cloud" automatically
  - No undo or revision control → not a replacement for backing up! ***BE CAREFUL***!
- Possible—but not ideal—to setup with Dropbox
  - https://www.zotero.org/support/sync

Setting up & maintaining groups

- Groups allow collections to be share across a class, colleagues, or larger project

- Creating a new group will launch browser window

  - **Private** groups are invite only and hidden from search
  - **Public, closed** groups are invite only but searchable
  - **Public, open** groups allow anyone to join

- Other settings

  - Roles: Members, Administrators, Owners
  - Library: Visibility, Editing permissions

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- **Questions and wrap-up (~10 min)**
  - **Plugins**
  - **Customizing styles**
  - **Other Zotero resources**

Plugins

- Strong developer community has created ecosystem of plugins for a variety of uses
  - Desktop integration/querying - Qnotero, ZotQuery
  - Metadata importing/exporting – ZotFile, AutoZotBib
  - Data visualization – Zotero Maps, Paper Machines
  - Website – Zotpress, ZoteroImport for Omeka, BiblioZotero for Drupal
  - Word processors – InDesign, LaTeX/Sublime

https://www.zotero.org/support/plugins

Customizing styles

- Zotero ships with several dozen popular citation styles (APA, MLA, Chicago, Harvard, etc.)
- Over 6,750 additional styles can be found in Zotero Style Repository
  - https://www.zotero.org/styles
- New styles can be written in the Citation Style Language
  - https://www.zotero.org/support/dev/citation_styles

Other Zotero resources

- Zotero Documentation:
  - http://www.zotero.org/support/
- Third-Party Documentation:
  - http://www.zotero.org/support/third_party_documentation
- Zotero evangelist listserv:
  - https://groups.google.com/forum/#!forum/zotero-evangelists
- Zotero developer listserv:
  - https://groups.google.com/forum/#!forum/zotero-dev

Thanks!

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