An Introduction to Zotero

Micah Muer / AkLA 2019
Mat-Su College, UAA
mwmuer@alaska.edu
Part 1: Background
A reference manager...

- Collects references (often automatically)
- Organizes references
- Generate bibliographies with a couple clicks
- Share references with others
Quick demonstration
Why teach reference managers?

- Some students want to know about them.
- “The most important library … the one on their laptops.”
- Let students focus on what really matters (not formatting text)
Lots of reference managers

- EndNote
- Mendeley
- NoodleTools
- RefWorks
- Zotero
- And many more
Part 2: So why choose Zotero over the rest?
Zotero is cost free

Buy EndNote X9
If you're buying EndNote for the first time, this is for you.
Download $249.95
Download $99.95
Shipped $299.95
Shipped $109.95
Add to cart
Add to cart

Upgrade to X9
You'll need your serial number from X8 (or earlier) to activate.

Student pricing*
Same powerful package, amazing low price.
North America & select countries
Europe, Australia, New Zealand and Japan
Zotero isn’t commercial
Zotero is a free, easy-to-use tool to help you collect, organize, cite, and share your research sources. https://www.zotero.org
Zotero requires no account
And accounts are easy to delete

Manage Email Addresses

You can log in using either your username or your primary email address. All account communications will go to your primary email address. You can reset your Zotero password using any verified email address.

micah@fastmail.net

Some features will not be fully enabled until you validate your email address

Add email address

Additional Email

Add

Permanently Delete Account
Zotero is well documented

- Importing from Other Reference Managers
- Organizing Your Library and Taking Notes
  - Collections and Tags
  - Searching
  - Sorting
  - Notes
  - Related Items
  - Duplicate Detection
- Generating Bibliographies, Citations, and Reports
  - Creating Bibliographies within Zotero
  - Word Processor Integration
  - Citation Styles
  - Reports
- Syncing, Collaboration, and Backup
  - Data and File Syncing
  - Groups
Best of all, Zotero is good

- It’s actually *really* good!
  - “In our testing, Zotero’s browser add-on was the easiest to use and captured data more accurately… Zotero generated the most accurate bibliographies” (Ivey and Crum, 2018).
  - “… Mendeley and Zotero are the most suitable reference managers at the present time” (Kratochvíl, 2017).
Part 3: Enough with talking!
http://zotero.org/download/

Zotero 5.0 for Windows
Your personal research assistant
Download

Zotero Connector
Save to Zotero from your browser
Install Firefox Connector
Make sure plugin and app are ready.
Let’s tweak our settings

- Edit → Preferences
- Zotero → Preferences (Mac)
Let’s make a collection
Let’s save some references!

- Go to worldcat.org, search for, and add *Fatal Flute and Stick Forms* by Chan Poi
Let’s save some references!

Now click the “Add Item by Identifier” icon and add an ISBN: 1495316300
Let’s save some references!

• Now click the “Add Item by Identifier” icon and add an ISBN: 1495316300
Let’s save some references!

Uncombable hair syndrome

From Wikipedia, the free encyclopedia

Uncombable hair syndrome, also known as Pili trianguli et canaliculi,[1]:639 Spun-glass hair,[2] Struwwelpeter syndrome (see Struwwelpeter) and Cheveux incoiffables,[3]:765 is a rare structural anomaly of the hair with a variable degree of effect. It was first reported in the early 20th century.[4] It typically
Let’s save some references!

• Go to https://twitter.com/hashtag/akla19 and add a tweet
Let’s save some references!

• Find an article on jstor.org and add it to Zotero
Zotero has site-specific support for many big sites

… but unsupported sites are just saved as “Web sites” and may require that you fill in some blanks.

Same with databases – most supported, but if not, try to save a reference as an RIS (“Endnote”) file.
Let’s save some references
Generate a bibliography
Generate a bibliography
Neat shortcuts

- For in-text citations, select item(s), press **Control+Shift+A**, then paste in document.

- For bibliography entries, select item(s), press **Control+Shift+C**, then paste in document.
Adding notes or attachments

• Right click one of your items…
  – Choose “Add Note”

• Can also attach files to an item this way
Sorting
Features we didn’t cover

- Shared folders
- Syncing
- LibreOffice/Word integration
- Using Zotero on mobile devices
- Downloading additional citation styles
- Using the program without the browser extension, or vice versa
Part 4: introducing our users to Zotero
Basic workshop outline

- “Wow moment”
- Installing Zotero
- Saving citations from catalog, database, website
- Generating a bibliography
Things to consider

- What databases do the students use?
- What citation styles do the students use?
- Are students ready to go beyond the very basics of citation?
- You might want a Zotero account just for teaching
Incorporating in teaching

- Annotated bibliographies
- Collaborative bibliographies
- Students could share folders with librarians
- What else?
So where can you learn more?

• [https://www.zotero.org/support/](https://www.zotero.org/support/)

• Jason Puckett has a really good book: *Zotero: A guide for librarians, researchers, and educators*

• He also has a libguide: [http://research.library.gsu.edu/zotero](http://research.library.gsu.edu/zotero)
One last thing: zbib.org
Bibliography (by Zotero)


Questions? Comments?

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We’ll start with the very basics, in case nobody has used Zotero or even any other reference manager.
A reference manager does all the things listed on the slide. It collects references, organizes references, generates bibliographies, and shares references with others. It’s like a personal database for your references.
Quick demonstration

Ask for an example research topic. Then show them how you can add wikipedia entry, a catalog item, a database item, and maybe a random PDF. Mention that this is a typical way to start a workshop on Zotero – you “wow” the students by demonstrating how easy it is to make a big bibliography. This also shows them the general concept of a reference manager.
Why teach reference managers?

- Some students want to know about them.
- “The most important library … the one on their laptops.”
- Let students focus on what really matters (not formatting text)

Teaches students to develop their own knowledge bases. Students can store citations from one class to the next, from one semester to the next, and indeed for their whole lives. It’s now not a matter of using once and forgetting. It’s important to note that Zotero is particularly important in this context because it is going to be available for a long time. We’ll come back to that.

Also, reference managers mean students can use more sources because reference managers ease organization, note-taking, and citations. As easy to cite 1 thing as 100.

Citation is a “mindless clerical process.” Emphasizing it detracts from what matters, which is finding, assessing, and using. Also, because reference managers show fields for each element related to a kind of source, it helps students identify the different characters of sources.
Lots of reference managers

- EndNote
- Mendeley
- NoodleTools
- RefWorks
- Zotero
- And many more

There’s lots more, too, including lots of mobile and open source desktop apps.
Part 2: So why choose Zotero over the rest?

Why choose Zotero over all the other applications?
Because the source code is freely available, there’s no point in charging for the program – and they don’t want to anyway. It’s developed as a public good.

By the way, the student pricing for Endnote is 114 dollars. And you have to go through a third party vendor that somehow checks to see if you’re really a student. Otherwise it’s a mere 249.95 for the normal version.

Now, of course, other reference managers are free...
But even free ones like Mendeley, or nominally free ones like Refworks, have ulterior motives. They are meant to tie you to some set of Databases. They might also sell your data. The terms of service for Mendeley state that Elsevier “may also share your personal information with our group companies and with sponsors, joint venture partners and other third parties...” Do I really want them to see the articles I read about health or politics?

And if you don’t believe that these commercial purposes have a detrimental impact on users, consider that Elsevier has gone out of its way to make it hard for Zotero to import Mendeley collections. They go so far as to encrypt all of the data stored locally, so that you have to use Mendeley’s limited export feature (and not Zotero’s purpose-built importer).

Zotero, on the other hand, lets you export in MANY formats.
A lot of the things that are good about Zotero stem from being free, open source software. Being free, open source software means that all of the code that makes up the program is free for anyone to inspect or to use. In the screenshot we can see that it is easy to browse through the source code. If the people behind Zotero – George Mason University and some other non-profits – stopped working on it, anyone with programming skills could pick up the ball. But even right now users can contribute – not so much with corporate projects developed by closed doors.

Another benefit is that you can see exactly what the program does. If you’re a programmer, you can make sure that the program is not doing anything suspicious.
Zotero requires no account

Because it’s a free product developed for the public good, there is no real reason for them to require an account. You can make one, and it’s a good idea to, but it’s totally possible to use it without one. That makes it simpler and more private.

If you do want an account, you don’t have to mess around to prove you’re a student, etc. This is nice. I still forget how to set up a new RefWorks account, and I still get sick of students calling and asking for our NoodleTools code (this is a reference manager we use, on a small scale, at MSC).

Accounts are just for syncing data and easily sharing folders with others.
And the account is easy to delete anyway. Just login online, go to your settings, and click the “Permanently Delete Account” link.
Zotero is well documented

Because it is free, open source software that accepts contributions, anyone with software development or technical writing skills could contribute. I’m sure they’d even welcome bug reports.

Furthermore, because it’s a free product that anyone can adopt, lots of librarians use it, even if their institutions officially promote other tools. There’s a lot of library-focused material out there, from libguides and videos to handouts. And because of that open source ethos, a lot of it is creative commons-licensed.
Best of all, Zotero is good

- It’s actually *really* good!
  - “In our testing, Zotero’s browser add-on was the easiest to use and captured data more accurately… Zotero generated the most accurate bibliographies” (Ivey and Crum, 2018).

  - “…Mendeley and Zotero are the most suitable reference managers at the present time” (Kratochvil, 2017).

- So the quotes are cherrypicking for sure, but it goes to show that it isn’t some substandard option that you have to put up with because it’s free and open source.
Part 3: Enough with talking!

So far we’ve done...
1) a brief intro to reference managers
2) a quick look at how Zotero works to quickly generate bibliographies
3) A discussion of why Zotero is the best option (this part should be skipped for most student audiences)

Now we’ll do the hands-on, everybody-tries-it-out portion.
Please download both the app and the connector. And sorry, the plugin only works on Firefox, Chrome, and Safari.
Now make sure the plugin appears in your browser of choice – typically in the top right, where other add-ons appear -- and that you have the app running.
Let’s tweak our settings

- Edit → Preferences
- Zotero → Preferences (Mac)

Here are some settings I like to change:

- I turn off “Automatically tag...”
- I choose APA as my default citation style.
- And I configure my account settings to sync.
Let’s make a collection

Make a folder (collection) called whatever – perhaps “demonstration.”
Let’s save some references!

- Go to worldcat.org, search for, and add *Fatal Flute and Stick Forms* by Chan Poi

Let’s add a book from Worldcat. This is a good demo for a few reasons:

- If students want to add a book from the Alaska Library Catalog, this is one way to do it. (Another is to the UAA or UAF discovery tool like Summon, but that is not as site-agnostic).

- Worldcat is also default place Zotero looks when you enter an ISBN.

- But of course most of us aren’t browsing for books on Worldcat. Using WorldCat, though, shows that Zotero has site-specific support. In this case it recognizes the site and knows how to interpret its pages (it knows when you are looking at a record for a book, say).
Let’s save some references!

- Now click the “Add Item by Identifier” icon and add an ISBN: 1495316300

Zotero can take in an ISBN, DOI, etc., and find the document. Nice because, ideally, students aren’t planning to cite things as soon as they find them in a database – they should cite once they have had something in hand and read it. And at that point it is easier to type in an ISBN than it is to open a browse, go to a site, login, search for an article...
Let’s save some references!

- Now click the “Add Item by Identifier” icon and add an ISBN: 1495316300

And there’s the book we added.
Let’s save some references!

Another demonstration of site-specific support: Zotero knows Wikipedia pages are encyclopedia entries.
Let’s save some references!

- Go to https://twitter.com/hashtag/akla19 and add a tweet

So Zotero can even support sites like Twitter; it knows each tweet is a blog post.

An interesting thing here is that when you view a list of tweets, Zotero knows that there are many to choose from and you’ll be prompted for which one you want to select. Databases the same way if you are at the search results page -- you can save many citations at once. Looking at a detailed record for one item, it saves just that item.

P.S. Zotero automatically gives these the item type blog post. Site-specific support again.
Let’s save some references!

- Find an article on jstor.org and add it to Zotero
Something to remember

- Zotero has site-specific support for many big sites

- … but unsupported sites are just saved as “Web sites” and may require that you fill in some blanks.

- Same with databases – most supported, but if not, try to save a reference as an RIS (“Endnote”) file

What this means is that a New York Times page is recognized as being a newspaper article, a Wikipedia page is a dictionary entry, etc. But not so much with smaller sites: ADN.com seen as a website rather than newspaper.

Many databases work very simply – click icon, get reference plus a copy of the PDF. Some others will make you use “Export to Zotero” or, failing that, “Export to RIS” or “Export to Endnote.” And a very few sites (like the Alaska Library Catalog) can do neither. Just look for items on Worldcat then.
Let’s save some references

Sometimes you’ll want to manually enter things. I did it this way for my first eight years of Zotero use. Just click the New Icon button, pick an item type, and start filling out the fields.

Fields change depending on item type.

Note that the “Web page” item type can’t be selected from the “New Item” drop down. You have to add some other type of item, then change it in the left-most item details pane.
Generate a bibliography by select either a collection or an item, or multiple of either, and right clicking and choosing “Create bibliography...”
Generate a bibliography

Configure your bibliography. You can select a citation style, how to export, and whether to output citations (in-text citations) or bibliography (think full entries for a works cited section).
Neat shortcuts

- For in-text citations, select item(s), press Control+Shift+A, then paste in document.

- For bibliography entries, select item(s), press Control+Shift+C, then paste in document.

These shortcuts can expedite things, especially in-text citations.
Adding notes or attachments

- Right click one of your items…
  - Choose “Add Note”

- Can also attach files to an item this way

Adding notes is handy. Reference managers are really useful when combined with note-taking functionality.

When adding an attachment – say, a scan of an item you already put in Zotero – be careful to choose “Stored copy” rather than “Link.” Links just point to local copies of files, and won’t work if that file is deleted, renamed, moved, or otherwise unavailable.
I sometimes find it very useful to be able to quickly sort by author, or date, or publication date. But you have tons of options here. Zotero allows you to choose what columns you’ll display, the order they’re displayed in, and how to sort those columns.
Features we didn’t cover

- Shared folders
- Syncing
- LibreOffice/Word integration
- Using Zotero on mobile devices
- Downloading additional citation styles
- Using the program without the browser extension, or vice versa

Shared folders allow others to see your citations; you can also make truly collaborative folders where anyone can add stuff.

Syncing is hopefully an obvious idea.

Zotero can integrate with word processors, such as that it automatically inserts in-text citations and the appropriate references.

You can choose from thousands of new citation styles. Do it in options. The “stock” options have us covered, but there are some downloadable ones that make it easy to do annotated bibliographies in APA style, say.

Finally, you can use the browser extension without the app if you set up syncing – the browser extension then saves your references straight to the cloud. Or you can use the app alone if you’re okay with manually entering everything. (I did it this way for a long time.)
Part 4: introducing our users to Zotero

This section covers ideas for teaching Zotero or using in teaching.
Basic workshop outline

- “Wow moment”
- Installing Zotero
- Saving citations from catalog, database, website
- Generating a bibliography

This should cover the basic workshop for undergrads. It hits all they need to be able to do.
Things to consider

- What databases do the students use?
- What citation styles do the students use?
- Are students ready to go beyond the very basics of citation?
- You might want a Zotero account just for teaching

- Before teaching Zotero, think about your audience. How does Zotero work with the databases they’ll be using? Are their “gotchas” to worry about?
- Do you need to show students how to install an obscure citation style?
- If students know nothing about citations, a reference manager may be way over their head. Some teachers also want students to practice by hand before using tools like this.
- You may want to set up a separate Zotero account so that students don’t see your actual stored data, or so that you don’t ruin it.
Incorporating in teaching

- Annotated bibliographies
- Collaborative bibliographies
- Students could share folders with librarians
- What else?

Students could use Zotero to ease annotated bibliography assignments. Use a special citation style that turns the “extra” field into the annotation.

Students could use Zotero to share bibliographies. Handy for group work, but also could be used on a larger scale, for creating exhaustive bibliographies on a subject over the course of semesters.

Sharing with librarians: librarians can track student progress, or maybe librarians can use Zotero to share back to students
So where can you learn more?

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

- Jason Puckett has a really good book: Zotero: A guide for librarians, researchers, and educators

- He also has a libguide: http://research.library.gsu.edu/zotero

The official documentation is nice because one chapter links to third-party documentation, which is mostly from libraries.

The book is thorough without being boring or dry. Quite good for a technical manual.

And then his libguide is pretty handy, too.
If Zotero is too much for your needs, at least try zbib.org. It has some of the same ease and power. Similar sites exist, but are full of ads, tracking, and some even try to charge for features. Avoid them!
I am not a pedant. I wanted to show that Zotero makes it easy to cite things.
Questions? Comments?

mwmuer@alaska.edu