

*Please take a minute to  
answer a few questions  
before we begin.*

<https://bit.ly/3fdqpGX>

*Thanks!*

Zotero!

Sarah Potvin | Digital Scholarship Librarian

Carolyn Jackson | Agricultural and Life Sciences Librarian

# LINKS + other items of note

<https://bit.ly/TAMUNovemberZotero>

<http://tamu.libguides.com/zotero>

Note: this session is being recorded.

*Reminder  
G.R.A.D.  
Aggies  
please sign in  
online!*

<https://bit.ly/3kSr1CS>

OR

*Look for a link in the chat*

# Agenda for today's workshop

1. Introduction to Zotero
2. Collect
3. Organize
4. Cite
5. Share
6. Advanced Usage

# Zotero in a Pandemic



# Why do you need a tool to store your references?

The diagram shows a reference card with several labeled parts:

- Verse Reference:** A box pointing to the handwritten text "v.10".
- Author's Last Name:** A box pointing to the handwritten text "Nolland".
- Page Number:** A box pointing to the handwritten text "p.875".
- Note:** The main body of the card contains handwritten text: "- reader comes with positive look on pharisees & negative view on tax collectors".
- Paraphrase:** A box pointing to the word "paraphrase" written at the bottom of the card.

Two instructional boxes are also present:

- A box on the left states: "Use this space to write your **note** from the source. Include only one major note per card."
- A box on the right states: "Write if the note is a **summary**, **paraphrase**, or **quote**. This will help you correctly cite your sources when you write your paper."

# What is Zotero?

- Tool for collecting, organizing, citing, and sharing sources
  - Stores records about sources (a book's title, author, publisher, etc.)
  - For some electronic sources, Zotero will also save a copy of the item itself (PDF), or a snapshot if set as preference
- Free [currently: up to 300MB free in Zotero Storage, tiered payment beyond that; unlimited number of files to local Zotero library]
- Open-source
- Part of a "collaborative research infrastructure"
- Developed at the Roy Rosenzweig Center for History and New Media, George Mason University

# What is Zotero?

- A standalone [desktop application](#) and web-based tool, for Mac, Windows, or Linux
- Works with a [series of browser connectors](#) for Chrome, Safari, Firefox, and Edge to gather materials on the web
- Works with [plugins](#) for OpenOffice, GoogleDocs, and Microsoft Word to manage citations in word processors
- Zotero can also be run as a [browser bookmarklet](#). This extends functionality to tablets and mobile browsers but can be clunky. An iOS app is under development, and [third party apps](#) are currently available
- A number of third party developers have created plugins for Zotero that extend its functionality



# What if I need something \*less\* than Zotero?

<https://zbib.org/>

[Help](#) [Zotero](#)

zotero**bib**

Enter a URL, ISBN, DOI, PMID, arXiv ID, or title

Cite

Manual Entry

---

## Bibliography

Chicago Manual of Style 17th edition (note) ▾

# What if I need something more than Zotero?

**Erkin Özay** @erkinozay · Oct 4  
Replying to @sbenkorsh

I made the mistake of using EndNote. Once I became aware of its shortcomings, I upped my game on Excel. When I was in the thick of it, I found Excel was the most useful cuz I was able to color code, prioritize, coordinate, and tag stuff-it became similar to my brain.

1 2

**Zachary Schrag** @zacharyschrag · Oct 4  
Replying to @sbenkorsh

Zotero & DevonThink each do nice things with PDFs, though neither has all the features one might wish. For archival photos, operating system folders work, with or without an overlay like Tropy. FileMaker remains my favorite for taking notes on sources stored in multiple places.

1

**Dicle Taşkın** @DicleTaskin · Oct 4  
Replying to @sbenkorsh

Mainly Excel + Scrivener (for longer notes). Also Zotero to save the findings of online database searches (worldcat etc) organized by keywords. I use Scrivener for everything else, but for primary sources, I found this mix to be the most useful.

1

**Ariel Noyman** @relnox · Oct 4  
Replying to @sbenkorsh

There's a lot of love to Zotero, but I'd like to give props to a different combo: @JabRef\_org + @overleaf + @Dropbox. Jabref is my main driver for bibtex files. OL syncs with these files inside the project/paper itself (one source of truth 🥰). DB syncs JR +OL together.

1 4

**Fallon Samuels Aidoo** @UrbanPhD · Oct 4  
Replying to @bgoldst and @sbenkorsh

I was JUST about to email you for recs cuz me and Zotero r on the outs

1

**Sben Korsh** @sbenkorsh · Oct 4  
Replying to @bgoldst

Thank you, Brian! Wondering if you integrate it with your Zotero workflow then for secondary sources / scholarship?

1 3

**Brian Goldstein is thinking about post offices** @bgoldst · Oct 4

I use Zotero parallel to it for secondary source notes but also keep Word docs for chapters and overall projects for notes, key tidbits, thoughts, and the like.

1 3

**dubravka** @dubravka · Oct 4

I have been on zotero for years maybe evne full 10 but I realise now tropy is the missing link. How come no one told me that exists!

2 2

**Brian Goldstein is thinking about post offices** @bgoldst · Oct 4

I never used Zotero for primary sources, which must be your frustration, @UrbanPhD? I've liked Tropy for that purpose, and Zotero is still good for my secondary sources. I really just use it to organize my reading notes, not for generating footnotes.

2 1

**Fallon Samuels Aidoo** @UrbanPhD · Oct 4

And yes, Its useful for reading notes and compiling lit reviews, esp. with coauthors and RAs.

2

# What if I need something more than Zotero?

example of a scholarly toolkit with four components to achieve needed functionality:

- (1) web snapshots
- (2) permalinks
- (3) extracting reliable citation information
- (4) GoogleDocs integration
- (5) mobile usability

O'Donnell, Dan daniel.odonnell@uleth.ca via uleth.onmicrosoft.com  
to sharp-l@list.indiana.edu ▾

Mon, Aug 3, 12:46 PM ☆ ↩ ⋮

I use a couple of tools.

## 1. Zotero:

- a. a free, open source citation manager that is particularly strong for web resources, when compared to others.
- b. sits as an add-in to your browser (Chrome or Firefox, maybe others) and it does a pretty good job of reading the kind of web-site metadata you need for citations.
- c. also preserves a link and I think a snapshot (though I can't remember this last). Very Widely used in the Humanities
- d. exports to standard formats for moving to other systems
- e. has plug-ins and add-ons that allow you to cite-as-you write in Word, Open Office, and Google Docs.

## 2. Paperpile:

- a. Another citation manager, but this time proprietary (it's not very expensive).
- b. It's the best I know at recovering information from a PDF -- it seems to search Google Scholar.
- c. It's weaker than Zotero at recovering metadata from blogs and websites, but definitely saves a snapshot
- d. Imports and exports using all the major formats,
- e. Cite-as-you-write only for Google Docs, but extremely good there.

## 3. The Wayback machine browser plugin: <https://help.archive.org/hc/en-us/articles/360001513491-Save-Pages-in-the-Wayback-Machine>

- a. You should use this no matter what you do above: it force-saves web-pages into the Internet archive, meaning you have a permanent URL (and snapshot) for the pages you are citing that will survive even if the URL or site changes.

## 4. Todoist

- a. Neither Zotero nor Paperpile work on my smart phone, but Todoist has a great integration (I'm using todoist anyway for task tracking). I regularly "share" web pages, articles, emails, pretty much anything, as "tasks" in Todoist from my phone and then I add them to Zotero and Paperpile when I'm behind my computer.

# Collect

<http://tamu.libguides.com/zotero>

# Basics of Zotero Storage configurations

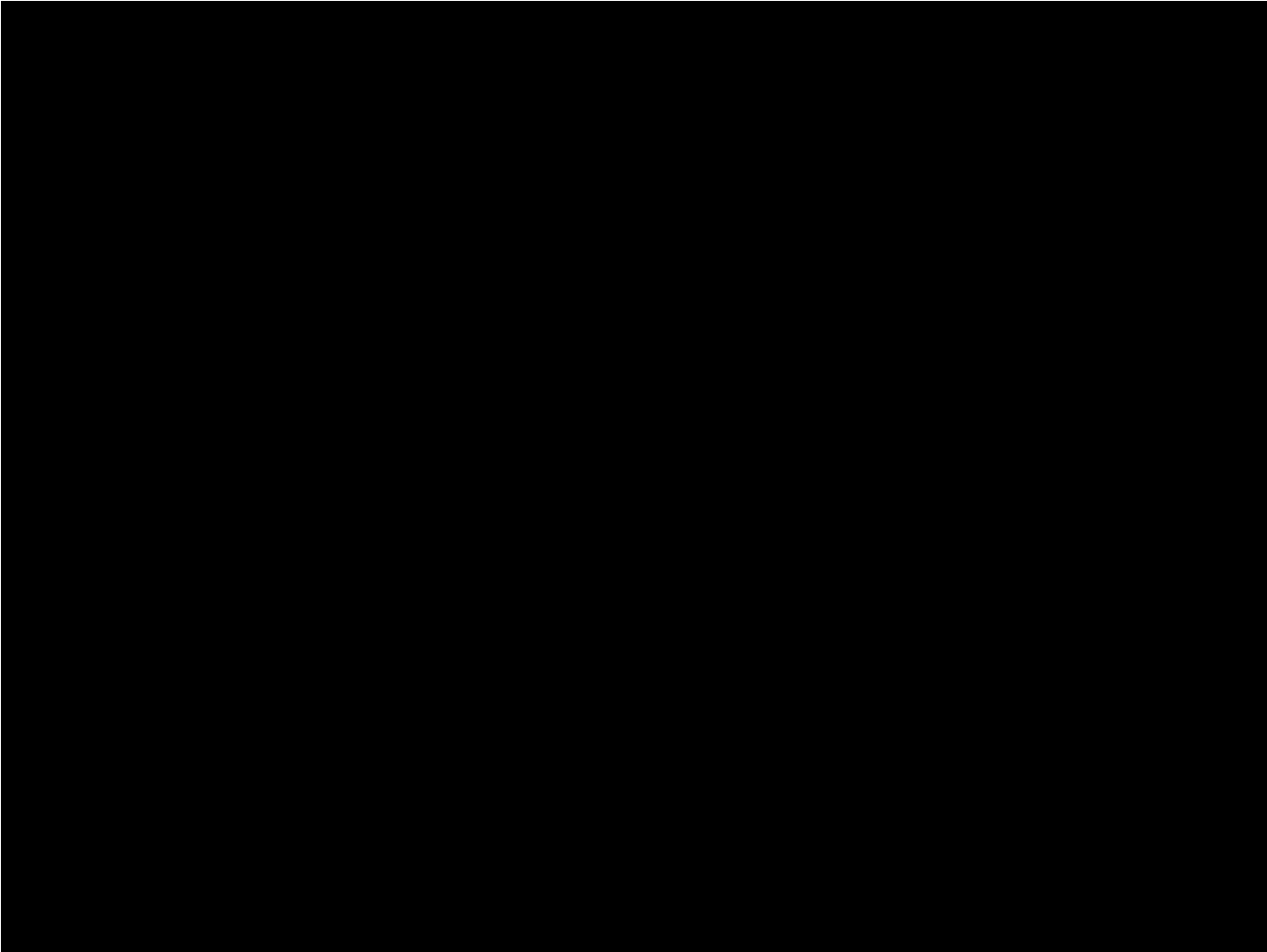
- Zotero to store files or just citation information.
- Zotero default = storing and syncing files (PDFs, web page snapshots, etc.). All files copied to and stored in Zotero data directory and managed by Zotero.
- Other option: Linked files.
  - Files stored on your computer, Dropbox, GoogleDrive, etc.
  - Zotero only stores a link to the location of the original file.
  - Recommend use of third party plugin, like ZotFile.
  - Limitations to using this option with group libraries.

# Finding Sources to Add to Zotero

The screenshot shows the homepage of the Texas A&M University Libraries. At the top right, there are links for "Hours", "Libraries", "MyLibrary", and "Help". The main header features the "ATM" logo and the text "Texas A&M University Libraries". To the right of the header is a blue dropdown menu labeled "Information for:". Below the header is a navigation bar with "Services", "Research", "Study Spaces", and "Borrowing" links, and a "Quick Links:" dropdown menu. The central area contains a search bar with the placeholder text "Quick search for books, articles, videos, journals, etc." and a "Search" button. Below the search bar is a link for "Advanced Search". There are four large buttons: "Research Guides", "Databases", "Books", and "eJournals". Below these are six smaller buttons: "Articles", "Audio", "Google Scholar", "Newspapers", "Theses & Dissertations", and "Video". At the bottom of this section is a link for "More options". A dark teal banner at the bottom of the page contains the text "Welcome to the indispensable hub of discovery, learning and creativity."

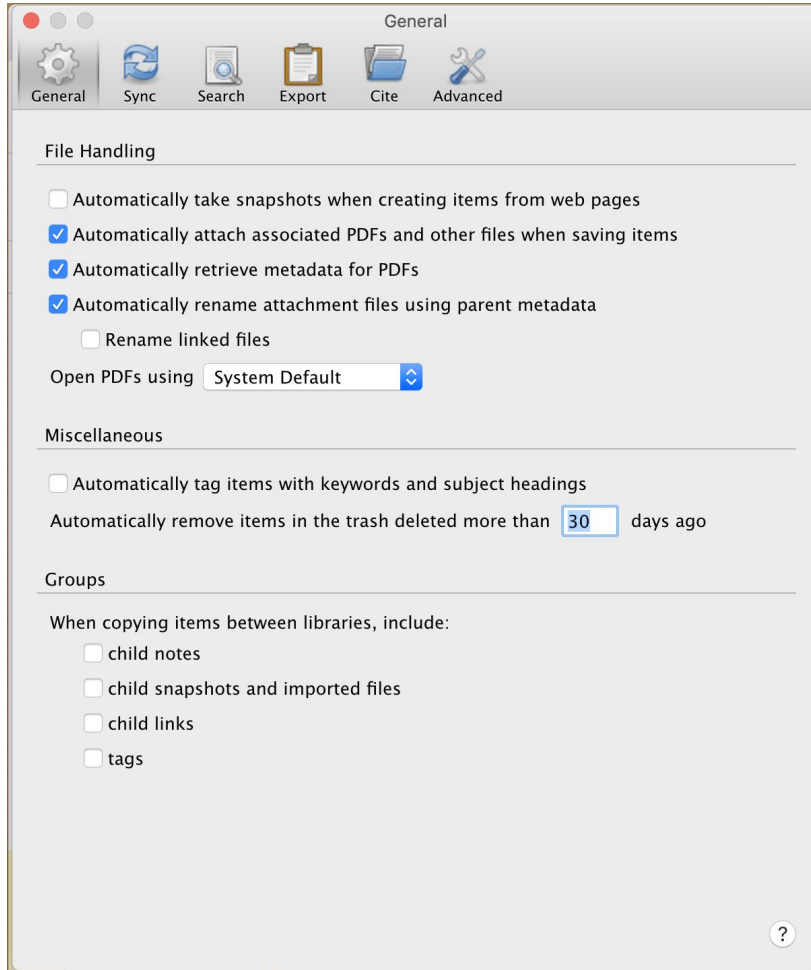
<http://tamu.libguides.com/zotero>

# Importing electronic or web-based resources



<http://tamu.libguides.com/zotero>

# your settings in Zotero



Do you want to:

- Take snapshots of web pages?
- Save PDFs of articles when saving items via Browser Connectors?
- Automatically assign tags?
- Sync your library?
- Install a Microsoft Word add-on?
- Set your default citation style?

... check your Preferences!



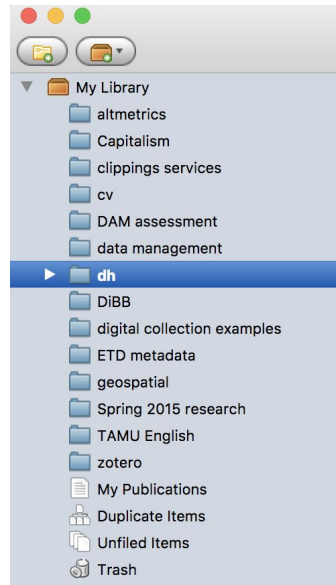
# data extraction quality issues



<http://tamu.libguides.com/zotero>

# Seemingly minor but important

- Make sure to designate the destination folder when saving citations AND/OR include “Date Added” in your library so you can easily identify newly-added citations



## Theorizing Research Practices We Forgot to Theorize Twenty Years Ago

Ted Underwood

*Representations*, Vol. 127 No. 1, Summer 2014; (pp. 64-72) DOI: 10.1525/rep.2014.127.1.64

ARTICLE

INFO & METRICS

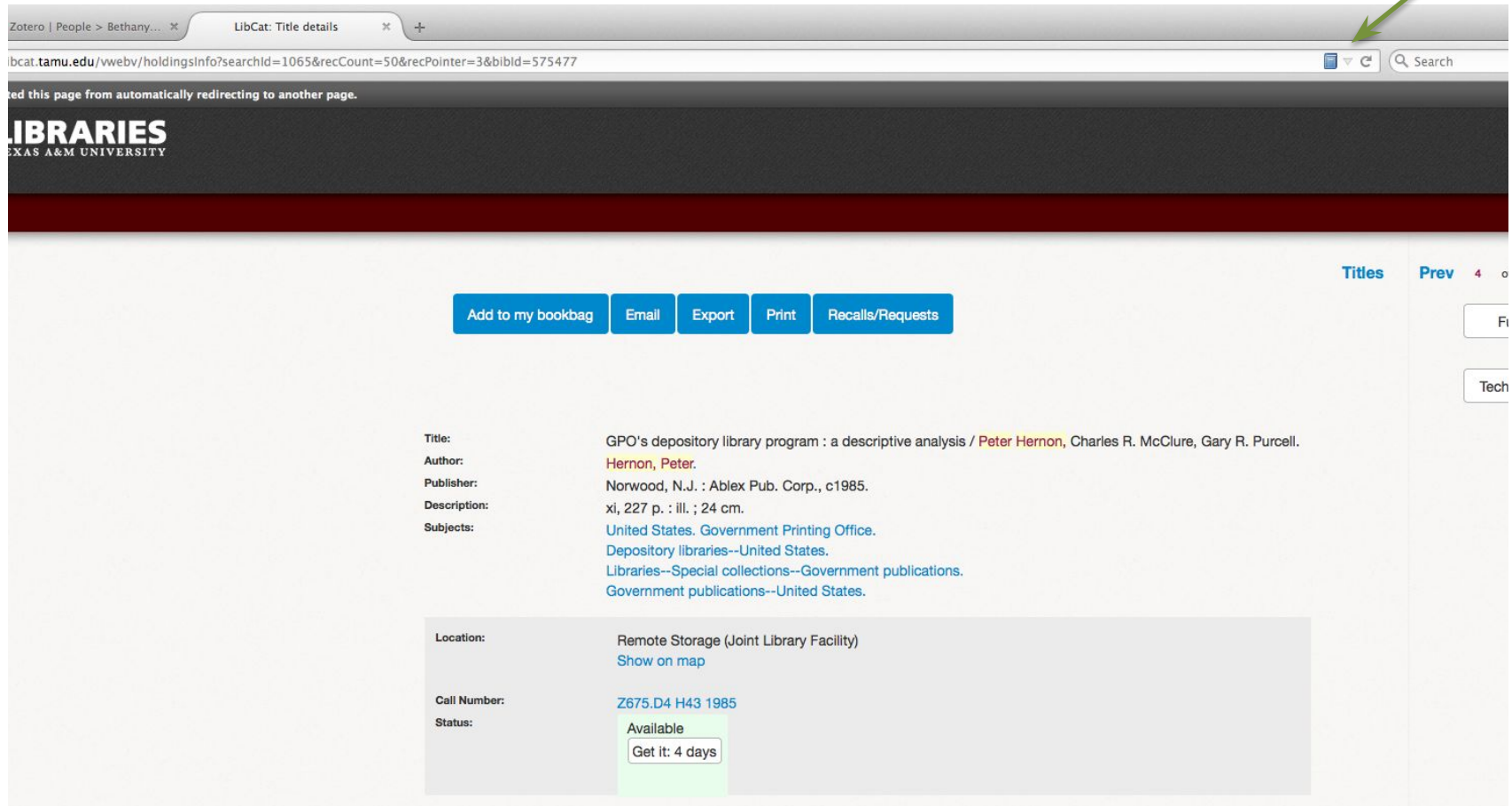
PDF

### Abstract

Quantitative methods have been central to the humanities since scholars began relying on full-text search to map archives. But the intellectual implications of search technology are rendered opaque by humanists' habit of considering algorithms as arbitrary tools. To reflect more philosophically, and creatively, on the hermeneutic options available to us, humanists may need to converse with disciplines that understand algorithms as principled epistemological theories. We need computer



# Importing (print) books: LibCat



LibCat: Title details

libcat.tamu.edu/vwebv/holdingsInfo?searchId=1065&recCount=50&recPointer=3&bibId=575477

LIBRARIES  
TEXAS A&M UNIVERSITY

[Add to my bookbag](#) [Email](#) [Export](#) [Print](#) [Recalls/Requests](#)

**Title:** GPO's depository library program : a descriptive analysis / Peter HERNON, Charles R. McClure, Gary R. Purcell.  
**Author:** HERNON, Peter.  
**Publisher:** Norwood, N.J. : Ablex Pub. Corp., c1985.  
**Description:** xi, 227 p. : ill. ; 24 cm.  
**Subjects:** [United States. Government Printing Office.](#)  
[Depository libraries--United States.](#)  
[Libraries--Special collections--Government publications.](#)  
[Government publications--United States.](#)

**Location:** Remote Storage (Joint Library Facility)  
[Show on map](#)

**Call Number:** Z675.D4 H43 1985

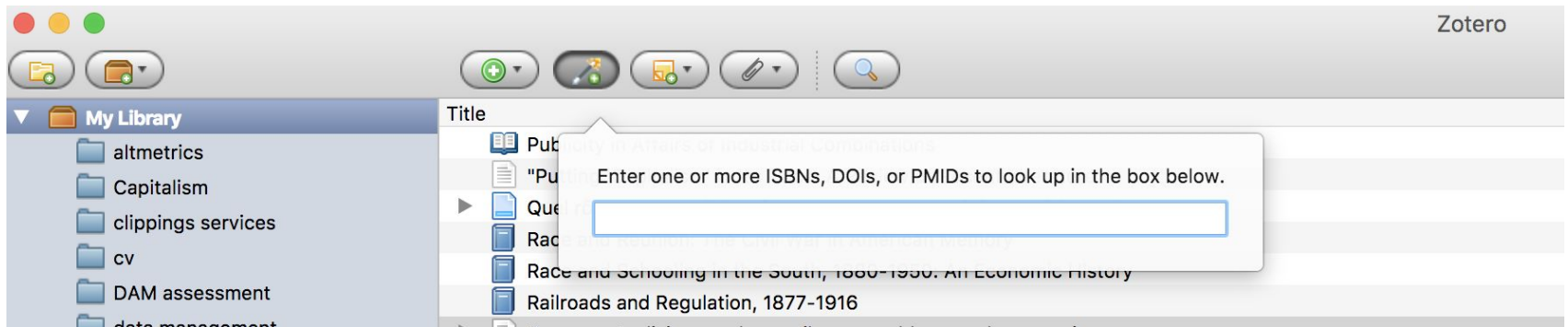
**Status:** Available  
[Get it: 4 days](#)

Titles Prev 4 0

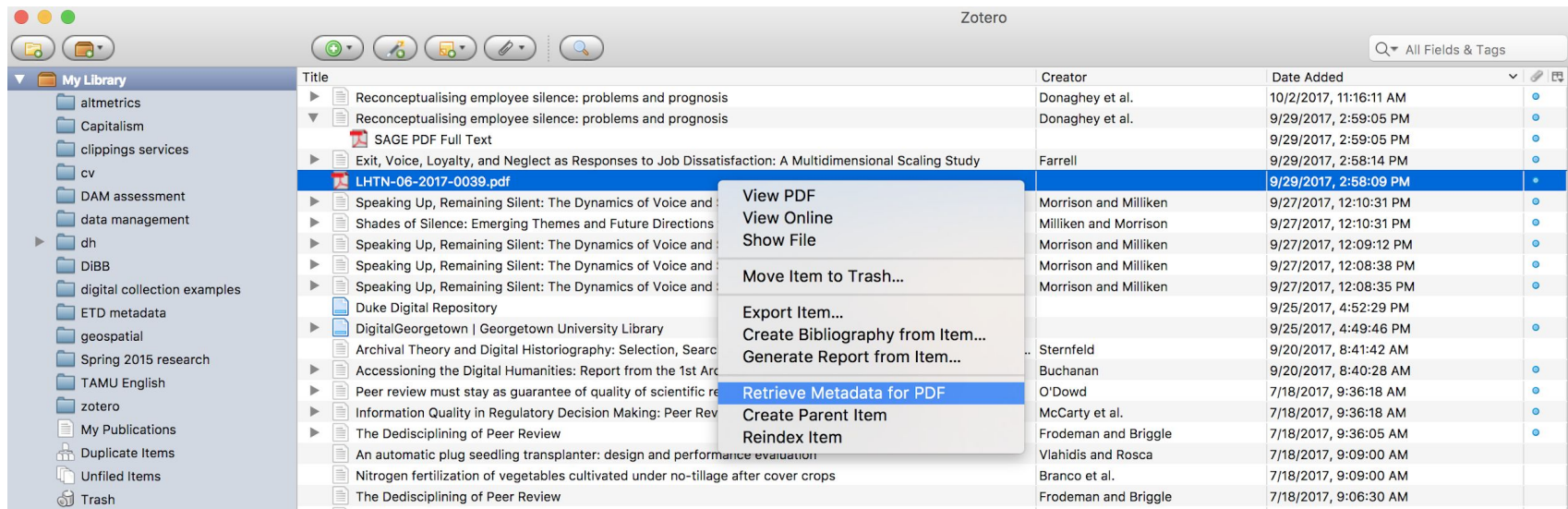
Fi

Tech

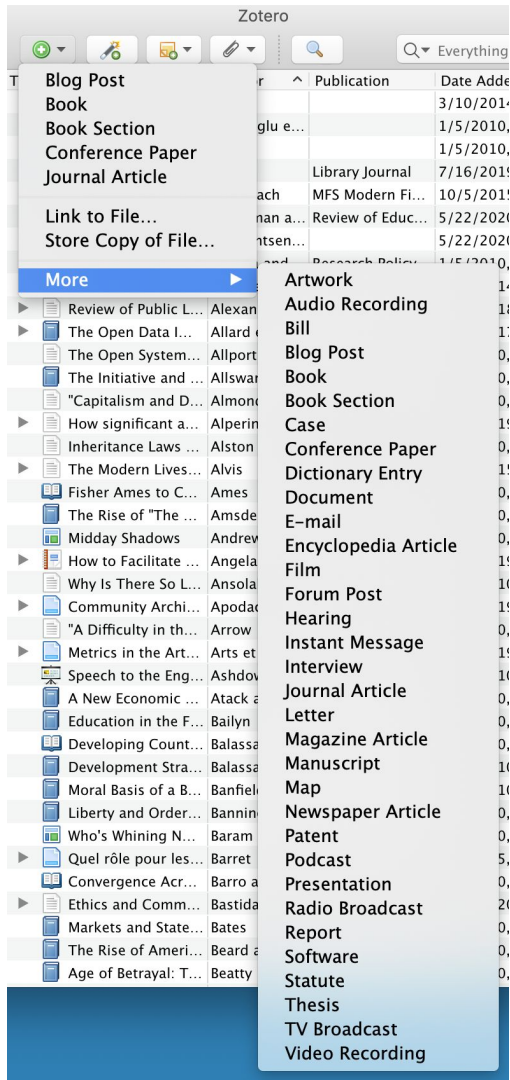
# Importing (print) books: ISBN



# Feature: Adding metadata to PDFs stored in Zotero



# Collecting other resources



Zotero anticipates many types of resources - from video recordings and podcasts to conference papers and email.

# Some Guiding Principles

Your citations are only going to be as good as the data that you take in (garbage in, garbage out), so:

- Zotero requires tidying and curation!
- Important to be attentive to the entries that are being created as you add to your library.
- The best time to fix that data is when you are saving a source.
- The data that you take in to Zotero is likely being created by an automated parsing process. The citations that you export using Zotero are being created by a machine following rules.
- Ultimately: no tool is perfect.

# Organize

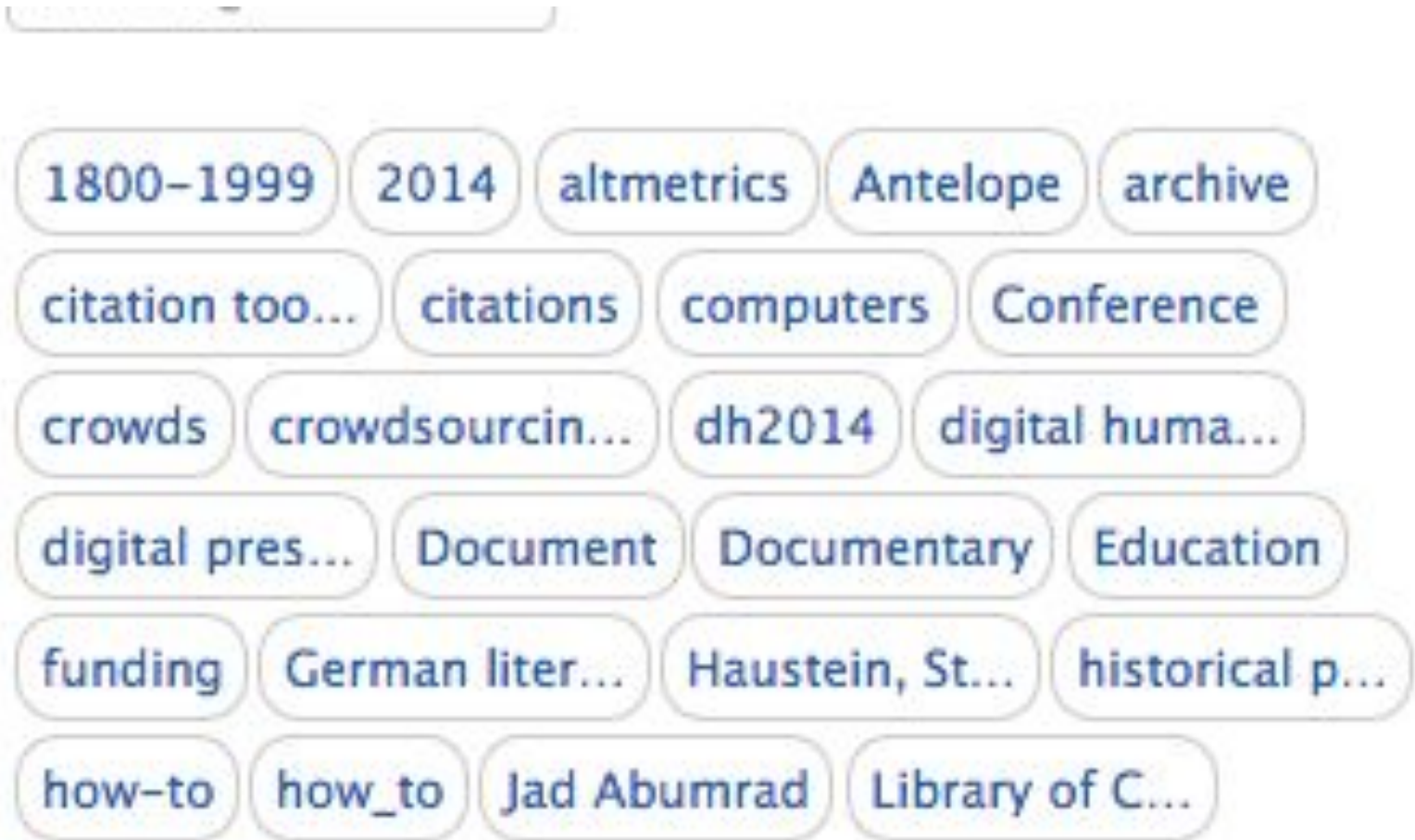
<http://tamu.libguides.com/zotero>



# Feature: Organizing and Tagging



# Feature: Organizing and Tagging



# Feature: Syncing Local & Networked

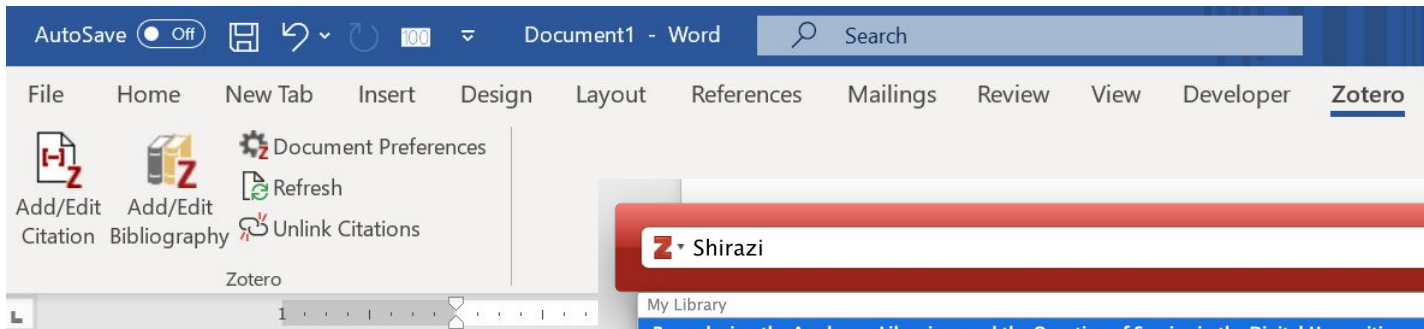


<http://tamu.libguides.com/zotero>

# Cite

<http://tamu.libguides.com/zotero>

# Feature: Generating Citations and Bibliographies



Alemneh, Daniel et al. "Guidance Document

Krabbenhoeft, and Katherine Skinner.

"Cataloging Electronic Resources." N.p., n.d.

---. Web. 2 Sept. 2014.

"Includes Chapter by Alemneh Focused on ETD Metadata."; n. pag. Print.

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<sup>1</sup> Emmons III, Willis M., Adele S. Cooper, and J. Richard Lenane. 1-800 Buy Ireland. Harvard Business School Case, n.d.

# Zotero + GoogleDocs

## Collaboration

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Google Docs is designed to let you collaborate on documents, and Zotero's integration is no different. You and your coauthors can all insert and edit citations in a shared document, and you don't even need to be in a Zotero group. If you're planning a large collaborative project, though, we recommend using a group library, which not only makes it easy to collect and manage materials but will also allow all collaborators to change cited item metadata (authors, title, date of publication, etc.). If someone cites an item from their personal library, only they will be able to update the metadata for that item.

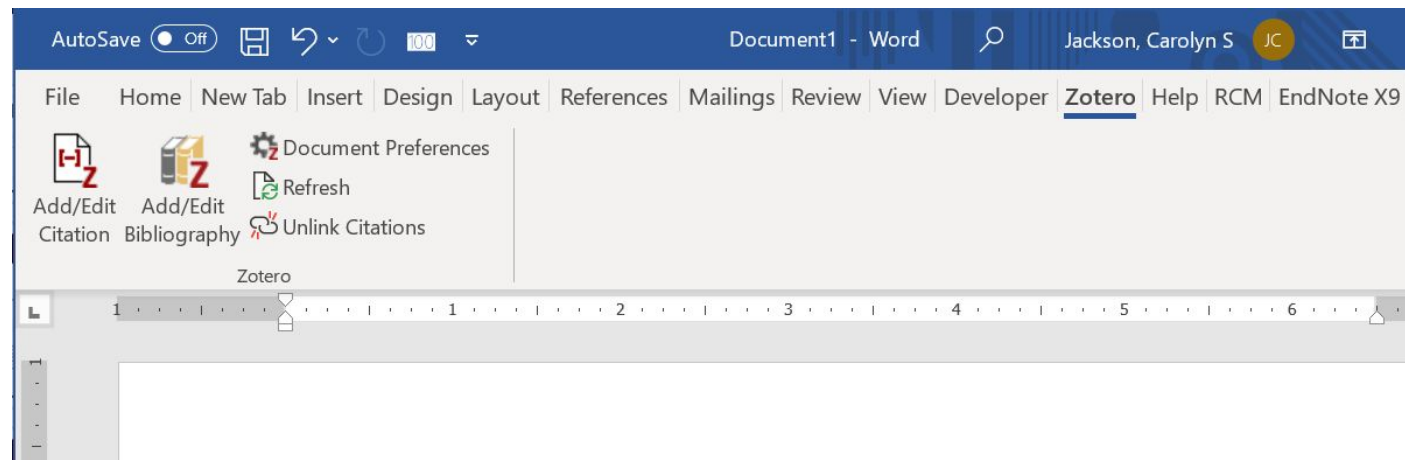
When working collaboratively on a document, you and your coauthors should avoid inserting or editing citations at the same time. The Zotero Connector has mechanisms in place to prevent document and citation corruption from concurrent citation editing, but due to technical limitations they do not provide perfect safety.

It's not necessary for everyone editing the document to have the Zotero Connector installed. Without the Zotero Connector, they'll see active citations in the document show up as links leading to URLs such as <https://www.zotero.org/google-docs/?abc123>, but they can still edit other parts of the document.

# Creating Bibliographies and Citations

## Word Processor Integration - add citations bibliographies directly

- Allows you to add citations and bibliographies directly from your documents.
- Microsoft Word, LibreOffice, or Google Docs
- Bundled with Zotero and should be installed automatically for each supported word processor.
- You can reinstall the plugins later from the Cite → Word Processor Plugins pane of the Zotero preferences.



# Creating Bibliographies & Citations

## Quick Copy - quickly add references to a paper, email, or blog post

- Formatted bibliography - select items in the center column > drag into any text field.
- To copy citations instead of references - Shift + drag.
- To configure - Zotero preferences menu > Export [Export](#).
  - Set the default export format
  - Set up site-specific export settings
  - Choose whether you want Zotero to include HTML markup when copying
- Use Quick Copy [keyboard shortcuts](#) to copy & paste citations and bibliographies into documents.
  - Ctrl/Cmd-Shift-C (bibliography)
  - Ctrl/Cmd-Shift-A (citations).



# Creating Bibliographies & Citations

## Right-Click to Create Citation/Bibliography

- Highlight one or more references
- Right-click (or control-click on Macs)
- Create Bibliography from Selected Item(s)
- Select a citation style
- Choose *Citations/Notes* or a *Bibliography*.
- Choose how to create your citation/bibliography:
  - *RTF* - rich text file
  - HTML file for viewing in a web browser.  
*Embeds metadata allowing other Zotero users viewing the document to capture bibliographic information.*
  - Copy to Clipboard to copy + paste
  - Print - send to a printer.

# Creating Bibliographies & Citations

## Citation Styles

Zotero ships with several popular citation styles

[Zotero Style Repository](#) has over 8,100 additional styles

# Creating Bibliographies & Citations

## Installing Additional Styles:

From [Zotero Style Repository](#)

- Zotero Style Manager (in the Cite pane of Zotero preferences)
- “Get additional styles...” option.
- Click the style title to install it into Zotero.

From [Zotero Style Repository](#) webpage in Firefox or Chrome with the Zotero Connector plugin installed to install styles directly into Zotero.

- Allows you to search by style name or
- filter by style type and academic field of study.
- By checking the box “Show only unique styles”, duplicate styles that share the exact same format are hidden (e.g. for the journal-specific styles “Nature”, “Nature Biotechnology”, “Nature Chemistry”, etc., only the *independent* “Nature” style is shown)

# Share

<http://tamu.libguides.com/zotero>

# Feature: Shared Libraries

zotero

Welcome, Sarah Potvin · Settings · Inbox · Download · Log Out

 Upgrade Storage

Home My Library **Groups** People Documentation Forums Get Involved

Search for groups  Search

[Home](#) > [Groups](#) > New group

## Create a New Group

[Search for Groups](#) · [Create a New Group](#)

### Group Name

Choose a name for your group

Group URL: <https://www.zotero.org/groups/>

### Group Type

#### Public, Open Membership

Anyone can view your group online and join the group instantly.

Choose a Public, Open Membership

#### Public, Closed Membership

Anyone can view your group online, but members must apply or be invited.

Choose Public, Closed Membership

#### Private Membership

Only members can view your group online and must be invited to join.

Choose Private Membership

[Create Group](#)

[Blog](#) · [Forums](#) · [Developers](#) · [Documentation](#) · [Privacy](#) · [Get Involved](#) · [Jobs](#) · [About](#) · [Mobile Site](#)

Zotero is a project of the [Roy Rosenzweig Center for History and New Media](#), and was initially funded by the [Andrew W. Mellon Foundation](#), the [Institute of Museum and Library Services](#), and the [Alfred P. Sloan Foundation](#).

C	H
N	M

**ROY ROSENZWEIG**  
Center FOR  
History AND  
New Media

<http://tamu.libguides.com/zotero>

# Advanced Tools

<http://tamu.libguides.com/zotero>

# Feature: Visualization Plug-Ins

## Zotero Voyant Export

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Export your Zotero collections to Voyant.

[Voyant](#) is "a web-based text analysis and reading environment" that lets you visualize the content of a text corpus. [Zotero](#) is a "a free, easy-to-use tool to help you collect, organize, cite, and share your research sources." This translator aims to help those with preexisting Zotero collections get a new view on their data via Voyant.

## Requirements

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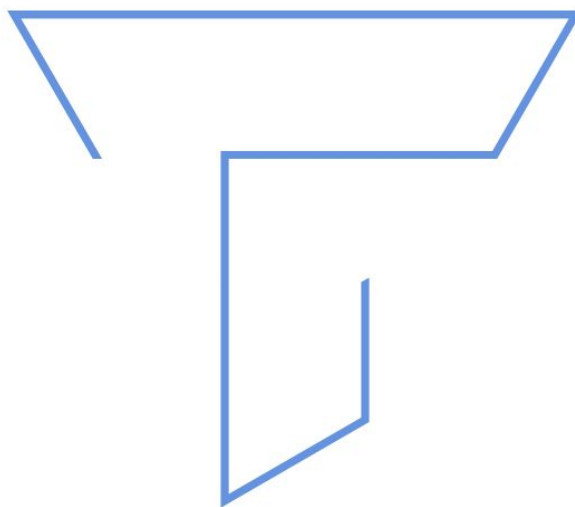
- [Zotero Standalone 5.0](#) or higher; note that **the beta will irreversibly upgrade your database (!)**, so take care to backup beforehand.
- a collection containing full texts (as PDFs, HTML snapshots, etc.)

## Installation

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Download the latest [release](#) of the XPI (click "Save Link As..." if in Firefox). Then open Zotero Standalone and select the Tools menu -> Add-ons. Click the gear icon in the upper right and select "Install Add-On From File..."; open the XPI file you just saved.

# \*\*New tool: Tropy\*\*



## Research Photo Management

<http://tamu.libguides.com/zotero>



# \*\*New tool: Tropy\*\*

## Zotero integration?

■ Feature request



bdarcus

12d

I imagine this may be on the road map, but would be nice if one could easily, and/or automatically, sync tropy metadata with a zotero library.

1 Like

created	last reply	1	95	2	1	
12d	10d	reply	views	users	like	▼



inukshuk

10d

Hi Bruce! It is definitely on the road map, as we shift our focus to export and import workflows. The first target, with regard to Zotero, will be the RDF export because Tropy's metadata model is essentially based on RDF-like triples already. For example, you can already import a vocabulary like bibo as N3 or TTL into Tropy and create templates using its properties. (Using the version from LOV you would currently see a few warnings about protected vocabularies, but these are just because of some definitions of properties already defined by Tropy's core vocabularies). We'll be working to provide more support for export / import and expose more of the capabilities of the data model and templates as we go along.

## Alternative Installation Methods

You can also install CSL styles (with a “.csi” extension) from local files on your computer (e.g., styles that you edit yourself or that you download from another website). In the [Zotero Style Manager](#), click the '+' button, then find the style file on your computer.

# Feedback

Please take a minute to give us feedback on this workshop. This helps us provide better workshops to meet your needs.

<https://bit.ly/2Ke7Erh>

*Thanks!*

# Need a hand?



LibGuide:

<http://tamu.libguides.com/zotero>  
o [also: you can find many other  
Zotero guides]

Zotero Forums:

<https://forums.zotero.org/discussions>

Zotero Twitter: [@zotero](https://twitter.com/zotero)

Contact us:

[spotvin@tamu.edu](mailto:spotvin@tamu.edu)  
[csj@tamu.edu](mailto:csj@tamu.edu)