

Introduction to Zotero

What is a citation management software?

Citation managers allow you to save and organize citations. They can make it easy to quickly insert citations while writing and create a bibliography compliant with many different bibliographic styles. Some citation managers also allow you to share your citation library with collaborators, with various degrees of permissions.

There are many different citation managers. Here is a Berkeley library web guide that gives more info about citation manager options and compares four major ones:

<https://guides.lib.berkeley.edu/c.php?g=4385&p=3061094>

Why use Zotero?

- Plugins for google doc and word
- Back up your citations in the cloud
- Integrates with Word, LibreOffice, and Google
- Zotero is just one choice among many tools
- Free!
- Can easily collaborate and share citations publicly

Install Zotero & Connector

Download and install the client from Zotero.org, then install the connector. Zotero will recognize the browser you are using to access the site and will offer you the connector for that browser. You can use multiple browsers to collect resources.

1. Go to <https://www.zotero.org/download/>
2. Download Zotero
3. Next download 'Install Chrome Connector'
 - a. works on Google Chrome, Firefox, or Safari
4. Once it is installed on google docs you should have a tab titled "Zotero"
 - a. You may need to refresh the page

Adding Items

If you have PDFs on your computer that you'd like to add to your library, just drag them into the Zotero pane. Zotero will try a number of ways to match the PDF with its citation.

If it cannot find it, I'd recommend searching in Google Scholar or another resource for the citation and adding it to your library. Then you can attach the PDF to the item by dragging it onto it.

Exercise 1: Add a PDF to your library

1. Go to Edit > Preferences > General and make sure these two boxes are checked: "Automatically retrieve metadata for PDFs" and "Automatically rename attachment files using parent metadata"
2. Find a PDF on your computer and drag it into the center pane of your Zotero client.
3. The first time you do this you may be prompted to install utilities that enable PDF indexing. Follow the prompts.
4. An entry for the PDF should be automatically generated with the PDF attached.

Exercise 2: Add items from Georef database

1. Go to Georef database at <http://bit.ly/344kRIS>. (You will only be able to access this database if you are on the AirBears 2 network)
2. Search for **speleothems climate china**
3. Click on the "Full text – PDF" link under the first result ("Climatic and Anthropogenic Impacts on $\delta^{13}\text{C}$ Variations in a Stalagmite from Central China")
4. The Zotero connector icon should appear as an article. Click on the icon to add the item to your Zotero library.
5. Check the bibliographic information. Is it correct?
6. Now look at the item in the middle pane. Click on the > to the left of the title. Do you see a PDF there? If so, double-click on the title to open the article.

One advantage of using Zotero is that you can save information about a web page you visited, and it will also capture a snapshot of the page, so if the page later changes, you still have access to the information you found.

Exercise 3: Add a web page

1. Go to <https://www.wikipedia.org/> and do a search for "Hurricane Dorian."
2. What did your Zotero icon change to?
3. Click on the icon to add the page to your Zotero library.
4. Now look at the item in the middle pane. Click on the > to the left of the title. Do you see a snapshot listed there? If so, double-click to open the snapshot.

Sometimes the way you use and interact with Zotero will depend on whether you are using it primarily for citation management or also as a document manager.

Exercise 4: Add a USGS report

1. Go to <https://pubs.er.usgs.gov/publication/fs20193017>
2. The Zotero browser icon should change to a report.
3. Click on the icon to add to your Zotero library.

4. In your Zotero application in the middle pane look at the item. Is there an expand (>) symbol to the left of the title? Sometimes Zotero will grab the citation correctly but not the actual pdf.
5. Back at the website, click on the link to view the pdf of the report. You can now save this to your Zotero library.

Syncing & Groups

A zotero account allows you to sync and access your library from anywhere, join groups, and back up all your attached files.

Exercise 5: Syncing from your desktop to the cloud

1. Go to Zotero.org.
2. Go to Login.
3. Enter your username and password.
4. Go to your “My Library” to see what citations are there.
5. Go to the Zotero desktop and click on the sync button that is in the right hand corner and looks like a circular arrow.
6. Go back to your online zotero.org account to check and see that the citations from the desktop have been added to your zotero.org account.

There are differences between using the desktop and the cloud for Zotero

- You can use the Zotero Chrome Connector to save pages to the cloud but Zotero recommends for the best results to use the desktop
- Without Zotero desktop you cannot write and cite with Word.

Groups allows you to collaborate with other people on projects and make your citations open to the public so that anyone can search for your group and view the citations in the group’s library.

Exercise 6: Search for and join a public group

1. Go to Zotero.org.
2. Login to your account.
3. Go to “Groups.”
4. Click on “Search for Groups.”
5. Search for “EPS grad workshop.”
6. Click on “Join.”

Inserting Citations & Creating Bibliographies

Now we get to the fun part: creating bibliographies!

Exercise 7: Setting a citation style and creating a bibliography using drag and drop method

1. In your Zotero preferences (Edit → Preferences), look at the citation styles available.
2. You can add more by clicking “Get additional styles...”
3. In the Style Search window that pops up search for AGU -- click on the result for “American Geophysical Union”
4. In the “Citation Options” section click the checkbox to include URLs of paper articles in references.
5. Click OK to close out of the Preferences window.
6. Open a word processing program and create a new document.
7. Select the references you want to add to your bibliography and drag them into the document.

Exercise 8: Create a bibliography in Word

1. Open a new Word document.
2. Click on Zotero in the menu bar to display the Zotero menu.
3. Type a sentence and then click on Add/Edit citation.
4. When the red bar appears, type a word from one of the citations in your library.
5. When the citation you want appears, select it and then hit enter.
6. Click on the citation that you see, and add a page number.
7. Hit enter, and then hit enter again.
8. Place your cursor where you want your bibliography to begin.
9. Click on Add/Edit Bibliography.
10. The citation should appear in bibliographic style format.

Exercise 9: Creating a bibliography using GoogleDoc plugin

1. Open Google Drive and create a new document.
2. Open Zotero on your desktop.
3. Click on Zotero in the menu bar to display the Zotero menu.
4. Type a sentence and then click on Add/Edit citation.
5. When the red bar appears, type a word from one of the citations in your library.
6. When the citation you want appears, select it and then hit enter.
7. Click on the citation that you see, and add a page number.
8. Hit enter, and then hit enter again.
9. Place your cursor where you want your bibliography to begin.
10. Click on Add/Edit Bibliography.
11. The citation should appear in bibliographic style format.