

zotero Tutorial

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CAOS Monday Lunch



What is Zotero?

- It is a paper manager (bibliographic data and PDF files)
- It is free* and open source
- It is powerful with large degree of freedom for customization

The screenshot displays the Zotero application window. On the left is a sidebar with a file tree under 'My Library' containing folders like 'Book Reviews', 'Colonial Medicine', 'Dissertation', 'Science and Empire', 'Teaching', 'Mapping', 'Open Access', 'Text Mining', 'Visualization', 'My Publications', 'Duplicate Items', and 'Trash'. Below this are 'Group Libraries' and 'To Read' items. The main pane shows a list of items with columns for Title, Creator, and Year. The item 'Circulation of Medicine in the Early Modern Atlantic World' by Cook and Walker (2013) is selected. On the right, the 'Info' tab shows details for this item: Item Type (Journal Article), Title (Circulation of Medicine in the Early Modern Atlantic World), Author (Cook, Harold J. and Walker, Timothy D.), Abstract (The search for powerful drugs has caused people and commodities to move around the globe for many centuries, as it still does...), Publication (Social History of Medicine), Volume (26), Issue (3), Pages (337-351), Date (2013/08/01), Series (Soc Hist Med), Language (en), DOI (10.1093/shm/hkt013), ISSN (0951-631X), and Short Title (https://academic.oup.com/shm/article/26/3/337/2633723). A small '2' is visible in the bottom right corner of the info pane.

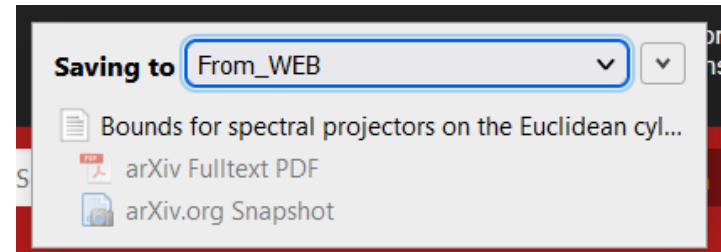
Title	Creator	Year
Guerre, maladie, empire. Les services de santé militaires en ...	Zaugg	2016
Officiers de santé et soignantes créoles face à la fièvre jaune	Nobi	2016
The Emergence of Tropical Medicine in France	Osborne	2014
Colonial Disease, Translation, and Enlightenment: Franco-Briti...	Charters	2014
Trading in Drugs through Philadelphia in the Eighteenth Centu...	Wilson	2013
The Medicines Trade in the Portuguese Atlantic World: Acquisi...	Walker	2013
Leprosy and Slavery in Suriname: Godfried Schilling and the Fr...	Snelders	2013
Medical Experimentation and Race in the Eighteenth-century ...	Schiebinger	2013
The Circulation of Bodily Knowledge in the Seventeenth-centu...	Gómez	2013
Circulation of Medicine in the Early Modern Atlantic World	Cook and Walker	2013
Synthesis of scholarship on "medicines" to restore focus o...		
Full Text PDF		
Colonial Medical Encounters in the Nineteenth Century: The Fr...	Thoral	2012
Networks in Tropical Medicine: Internationalism, Colonialism, a...	Neill	2012
Early Clinical Features of Dengue Virus Infection in Nicaraguan...	Biswas et al.	2012
Medicine in an age of commerce and empire: Britain and its tr...	Harrison	2010
Finding the "Ideal Diet": Nutrition, Culture, and Dietary Practic...	Neill	2009
Battles of the Self: War and Subjectivity in Early Modern France	Pichichero	2008
The Experiments of Ramón M. Termeyer SJ on the Electric Eel ...	de Asúa	2008
Psychiatry and Empire	Mahone and Vaughan	2007
Medicine and the Market in England and Its Colonies, C.1450-...	Jenner and Wallis	2007
Matters of exchange: commerce, medicine, and science in the...	Cook	2007

The plan

- I will talk about
 - Zotero as a tool for organizing papers
 - i.e.: the pipeline of
 - Getting the papers from journals
 - Organize the papers in a folder structure
 - Cite the papers
 - My workflow as “what is possible?”

Importing papers: from web

- [Zotero Connector](#)
- A browser plug-in for easy import of papers from journal website
- It works on the google scholar page as well, but it will not grab the PDFs.



Zotero automatically redirected your request to journals.ametsoc.org through the proxy at proxy.library.nyu.edu.

- It also automatically redirect journal website through saved proxy (e.g.: the [NYU library proxy](#))

Importing papers: from PDF

- Just drag and drop
- Does not work 100%, especially for old papers
- Potentially useful plug-in: [Zotero Folder Import](#)

The screenshot shows a Zotero library interface with a list of papers. A dialog box titled 'PDF Metadata Retrieval' is open, displaying a green progress bar and a table of retrieved metadata. The table has two columns: 'PDF Name' and 'Item Name'. The papers listed in the background include 'An Algorithmic Introduction to Numerical Simulation of Stochastic Different...', 'Submesoscale Fronts and Their Dynamical Processes Associated with Symm...', 'Specific...', 'Journal of Physical ...', 'Journal of Fluid Me...', 'SIAM Journal on A...', 'Physical Review E', 'Journal of Physical ...', 'SIAM Journal on N...', 'Physical Review E', 'Journal of Fluid Me...', 'Journal of Physical ...', and 'Optimization by Simulated Annealing.pdf'.

PDF Name	Item Name
✓ GermainP_MyersonS_2022_Bounds...	Germain and Myerson - 2022 - Bou...
✓ GermainP_MyersonS_2022_Bounds...	Germain and Myerson - 2022 - Bou...
✓ GodbersenP_et_al_2021_Beauty_of_...	Godbersen et al. - 2021 - Beauty of...
✓ Higham.D_2001_An_Algorithmic_In...	Higham - An Algorithmic Introducti...

Importing papers: from .bib

- It works to add them as Zotero items
- Then one could ask Zotero to find the PDF

The screenshot displays the Zotero application interface. On the left, a list of papers is shown with columns for 'Creator' and 'Title'. The 'Find Available PDFs' dialog box is open, showing a progress bar and a table of search results. A context menu is also visible, with 'Find Available PDF' highlighted.

Creator	Title
Aftalion	How to Run 100 Meters
Akhmediev et al.	Rogue waves and rational solutions of the nonlinear Schrödinger equation
Bourrianne et al.	Quantifying the effect of a mask on expiratory flows
Brin and Page	The anatomy of a large-scale hypertextual Web search engine
Garabato et al.	Kinetic Energy Transfers between Mesoscale and Submesoscale Motions in the Ocean
Germain and Myerson	Bounds for spectral projectors on the Euclidean cylinder
Godbersen et al.	
Higham.	
Jing et al.	
Jones and Cessi	
Kirkpatrick et al.	
Moroney et al.	
Newman	
Pierrehumbert	
Takatori and Brady	
Toner and Tu	Flocks, herds, and schools: A quantitative theory of flocking
Vanneste	Vortex dynamics on a Möbius strip

Item	PDF
✓ An Algorithmic Introduction to Nu...	Full Text
✗ Submesoscale Fronts and Their Dy...	No PDF found
✓ Size Matters: Another Reason Why ...	Submitted Version
✗ Optimization by Simulated Anneali...	No PDF found

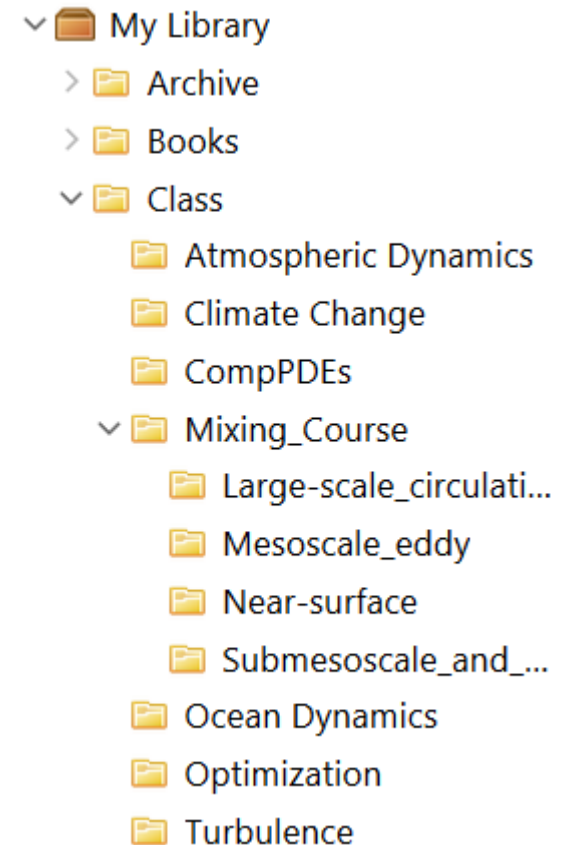
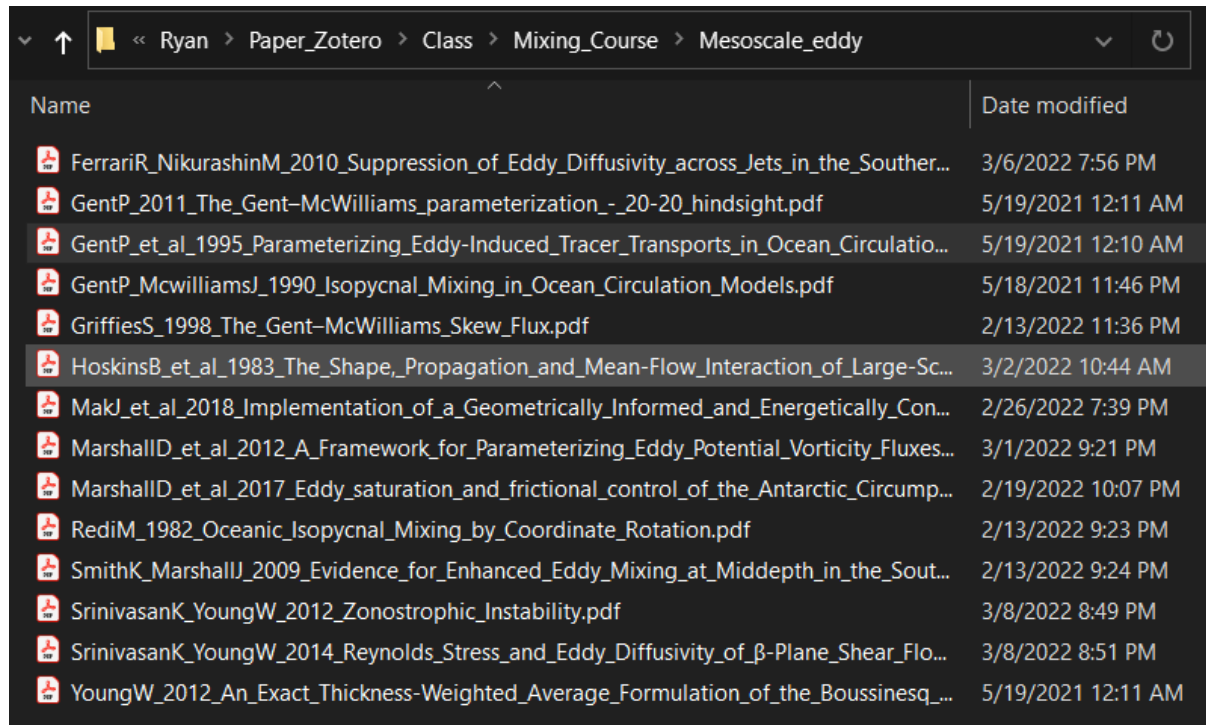
Year	Title
2001	duction to Numerical Simulation of Stochastic Different...
2020	s and Their Dynamica
2017	r Reason Why the At
1983	ulated Annealing
2016	of the Dominant Me
2002	disease on networks
2022	quintessential comp
2015	namics of active mat
1998	hools: A quantitative
2021	a Möbius strip
2001	SIAM review
2020	Journal of Physical ...
2017	Journal of Physical ...
1983	Science (New York, ...
2016	SIAM Journal on A...
2002	Physical Review E
2022	Journal of Fluid Me...
2015	Physical Review E
1998	Physical Review E
2021	Journal of Fluid Me...

Importing papers: from other software

- From Mendeley: [link](#)
- From Endnote: [link](#)
- From Papers 3 (unofficial): [link](#)
- From other apps: [link](#)

Organizing papers: into folders

- Sort the papers into folders within Zotero and (the PDFs) locally




Plug-in: Zotfile


- Rename and move the local PDF files
 - Folders follows the structure in Zotero
 - Name the files according to the citation information (e.g.: author, year, title)

Location of Files

ZotFile can move new and existing attachments to different locations. You can either store a copy of your attachment files in Zotero, which allows you to sync files to the Zotero server, or move the file to a custom folder and link to that location from Zotero

☐ Attach stored copy of file(s)

☒ Custom Location: 

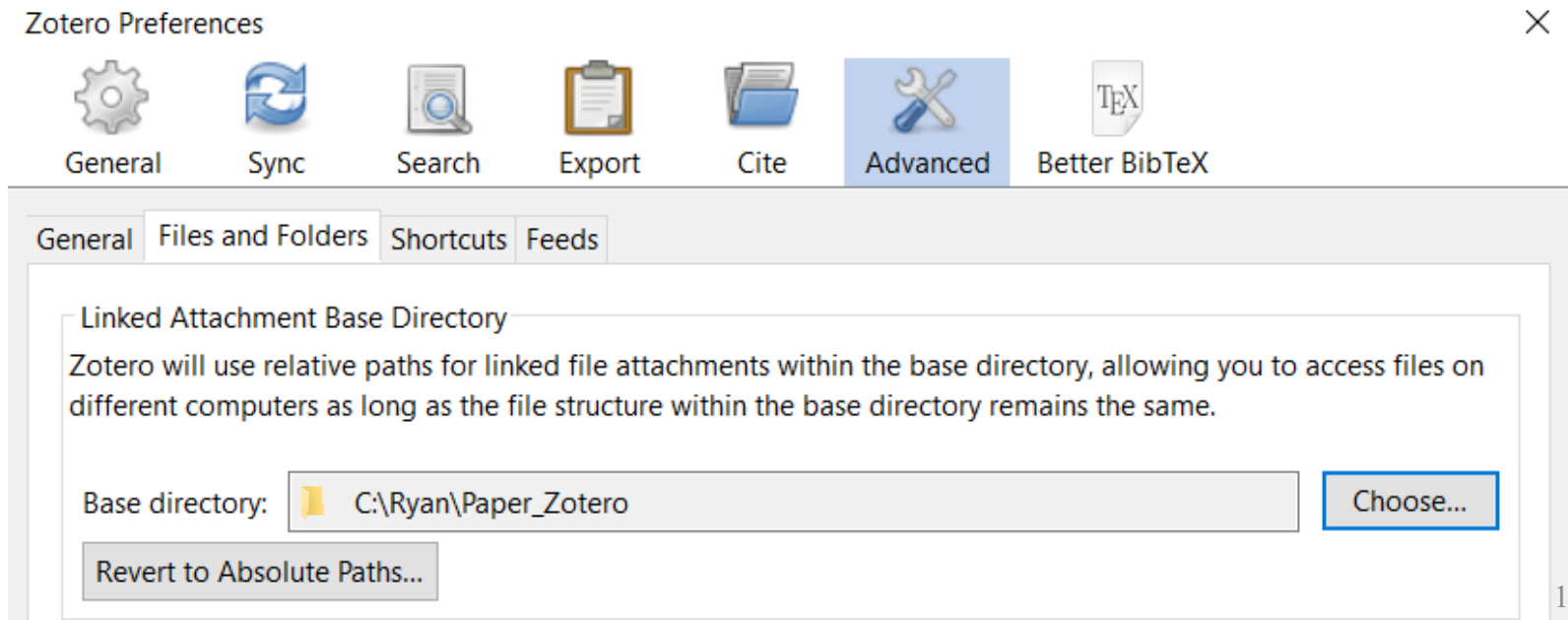
☒ Use subfolder defined by 

Format for all Item Types except Patents

{%F_}{%y_}{%t}

Zotfile for syncing over machines

- For free! ([Here is a detailed tutorial](#))
- Sync the PDFs using a cloud service
- Set Zotero to look for them using a relative path
- This also gives you easy access to your PDFs on tablets



Organizing papers: Other plug-ins

- [Zotero DOI Manager](#)
- [Zotero Citation Counts Manager](#)
- [Zotero Storage Scanner](#)
- ...
- [A list of useful plug-ins](#)

Citing papers: Better BibTeX

- Zotero works for generating .bib entries
 - But it will include all fields including abstract...
- Better BibTeX let's you do so much more
 - Customize the .bib output

When an item has both a DOI and a URL, export ⓘ

Fields to omit from export (comma-separated):

Include JabRef-specific metadata: ⓘ

- Generate unique citation keys following preferred pattern

Citation key format

☒ Force citation key to plain text

☒ Enable citation key search

Plug-in: Zutilo

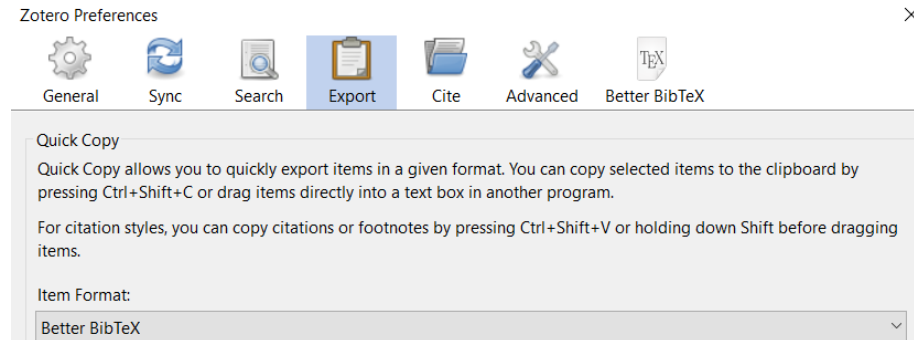
- I use it to assign shortcut to:

- Copy the .bib entry
- Copy the `\cite{...}` command
- Copy the formatted citation in my preferred format

QuickCopy items	Copying	Ctrl+Shift+C
QuickCopy items (alt 1)	Copying	Ctrl+Shift+A
QuickCopy items (alt 2)	Copying	Ctrl+Shift+D

- To set this up is not trivial

- But it is easy if you only want shortcut for one item!







- Otherwise, you have to venture to the “Config Editor”
- I could not find a good guide for it. [This post](#) is a start.
- It could also expand the options in the right-click menu

Citing Papers: Example

- See the [LaTeX example](#).

More features

- Tags and saved search
- Zotero profile for sharing your work
- Zotero group for collaboration

 TR_All
 TR_Book
 TR_Now
 My Publications

Ryan Shìjié Dù

[Library](#) · [Edit Profile](#)

Location

New York

Disciplines

- [Geology and Geophysics](#)
- [Applied Mathematics](#)

Affiliation

Courant Institute of Mathematical Sciences - New York University

Publications

Journal Article

[Statistical energy minimization theory for systems of drop-carrier particles](#) [PDF]

Physical Review E, 2021

[Details](#) [Add to Library](#)

Thanks for your attention

- The slide and the LaTeX examples are available at https://github.com/Empyreal092/Zotero_Tutorial