

zotero Tutorial

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MSG 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/26/3/337/1093337). A small '2' is visible in the bottom right corner of the interface.

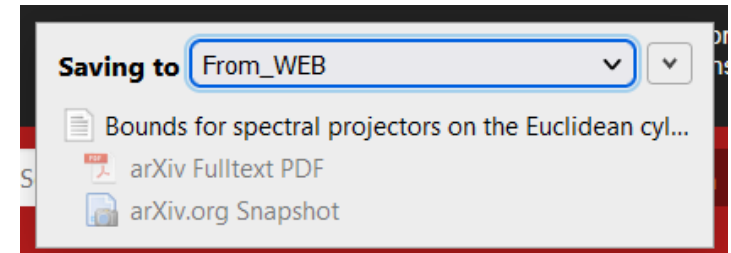
Title	Creator	Year
Guerre, maladie, empire. Les services de santé militaires en ...	Zaugg	2016
Officiers de santé et soignantes créoles face à la fièvre jaune	Nobi	2016
The Emergence of Tropical Medicine in France	Osborne	2014
Colonial Disease, Translation, and Enlightenment: Franco-Briti...	Charters	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 not cover
 - “How to organize papers”
- 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



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 'Finished' status with a green progress bar and a 'Close' button. The dialog box contains a table with the following data:

	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...

The background list of papers includes:

- Higham > An Algorithmic Introduction to Numerical Simulation of Stochastic Different...
- Jing et al. > Submesoscale Fronts and Their Dynamical Processes Associated with Symm...
- Jones and C...
- Kumar et al.
- Moroney et al.
- Newman
- Pierrehumbe
- Storch et al.
- Strang
- Takatori and
- Toner and T...
- Vanneste > Vortex dynamics on a Möbius strip
- > Kinetic Energy Transfers between Mesoscale and Submesoscale Motions in t...
- KirkpatrickS_et_al_1983_Optimization_by_Simulated_Annealing.pdf

On the right side of the interface, a list of papers is visible with columns for year and journal name:

- 2021 Journal of Physical ...
- 2017 Journal of Physical ...
- 2022 Journal of Fluid Me...
- 2016 SIAM Journal on A...
- 2002 Physical Review E
- 2022 Journal of Fluid Me...
- 2012 Journal of Physical ...
- 1968 SIAM Journal on N...
- 2015 Physical Review E
- 1998 Physical Review E
- 2021 Journal of Fluid Me...
- 2022 Journal of Physical ...

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.

Find Available PDFs

10 PDFs added

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

Context Menu:

- View Online
- Show in Library
- Add Note
- Add Attachment
- Find Available PDF**
- Add to Collection
- Remove Item from Collection...
- Duplicate Item
- Move Item to Trash...

Paper List (Visible):

Creator	Title	Year
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	

Other Papers (Visible in Background):

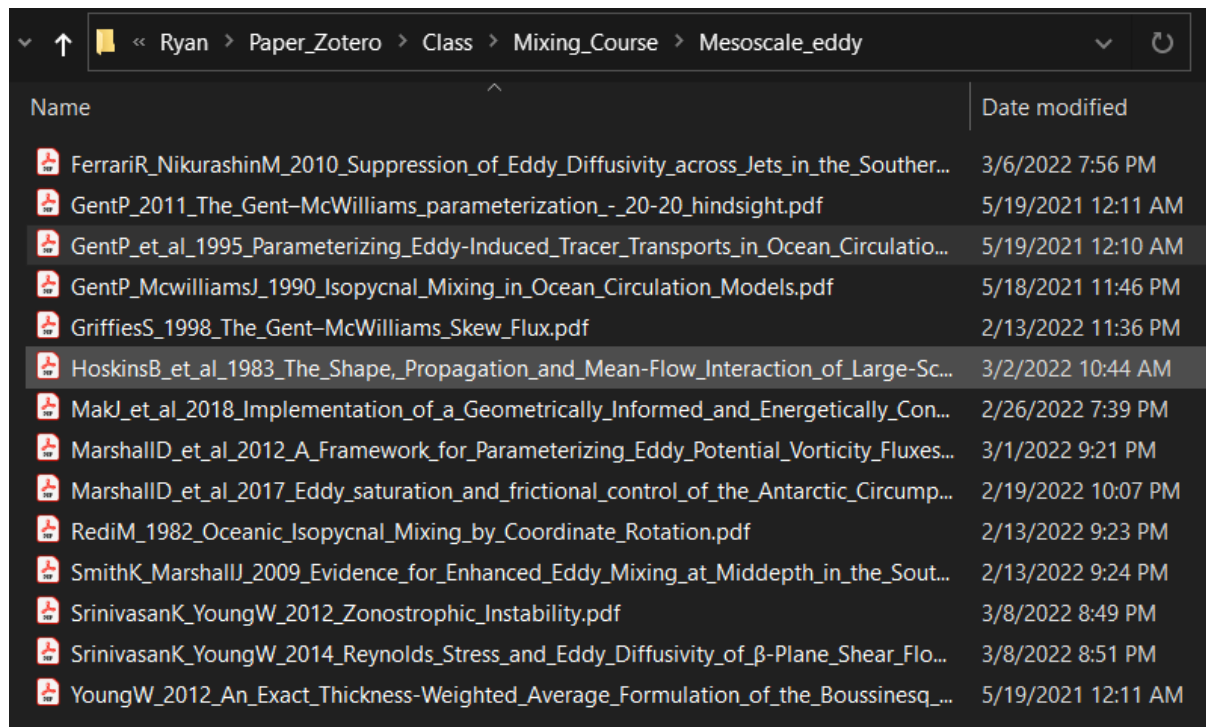
Year	Title
2001	Introduction to Numerical Simulation of Stochastic Different...
2020	Submesoscale Fronts and Their Dynamics
2017	Size Matters: Another Reason Why the Attraction of the Dominant Me...
1983	Optimization by Simulated Annealing
2016	Size Matters: Another Reason Why the Attraction of the Dominant Me...
2002	Size Matters: Another Reason Why the Attraction of the Dominant Me...
2022	Size Matters: Another Reason Why the Attraction of the Dominant Me...
2015	Size Matters: Another Reason Why the Attraction of the Dominant Me...
1998	Size Matters: Another Reason Why the Attraction of the Dominant Me...
2021	Size Matters: Another Reason Why the Attraction of the Dominant Me...

Importing papers: from other software

- From Mendeley: [link](#)
- From Endnote: [link](#)

Organizing papers: into folders

- Sort the paper into folders within Zotero and (the PDF) locally



Name	Date modified
FerrariR_NikurashinM_2010_Suppression_of_Eddy_Diffusivity_across_Jets_in_the_Souther...	3/6/2022 7:56 PM
GentP_2011_The_Gent-McWilliams_parameterization_-_20-20_hindsight.pdf	5/19/2021 12:11 AM
GentP_et_al_1995_Parameterizing_Eddy-Induced_Tracer_Transports_in_Ocean_Circulatio...	5/19/2021 12:10 AM
GentP_McwilliamsJ_1990_Isopycnal_Mixing_in_Ocean_Circulation_Models.pdf	5/18/2021 11:46 PM
GriffiesS_1998_The_Gent-McWilliams_Skew_Flux.pdf	2/13/2022 11:36 PM
HoskinsB_et_al_1983_The_Shape_Propagation_and_Mean-Flow_Interaction_of_Large-Sc...	3/2/2022 10:44 AM
MakJ_et_al_2018_Implementation_of_a_Geometrically_Informed_and_Energetically_Con...	2/26/2022 7:39 PM
MarshallD_et_al_2012_A_Framework_for_Parameterizing_Eddy_Potential_Vorticity_Fluxes...	3/1/2022 9:21 PM
MarshallD_et_al_2017_Eddy_saturation_and_frictional_control_of_the_Antarctic_Circump...	2/19/2022 10:07 PM
RediM_1982_Oceanic_Isopycnal_Mixing_by_Coordinate_Rotation.pdf	2/13/2022 9:23 PM
SmithK_MarshallJ_2009_Evidence_for_Enhanced_Eddy_Mixing_at_Middepth_in_the_Sout...	2/13/2022 9:24 PM
SrinivasanK_YoungW_2012_Zonostrophic_Instability.pdf	3/8/2022 8:49 PM
SrinivasanK_YoungW_2014_Reynolds_Stress_and_Eddy_Diffusivity_of- β -Plane_Shear_Flo...	3/8/2022 8:51 PM
YoungW_2012_An_Exact_Thickness-Weighted_Average_Formulation_of_the_Boussinesq_...	5/19/2021 12:11 AM

- ▼ My Library
 - > Archive
 - > Books
- ▼ Class
 - Atmospheric Dynamics
 - Climate Change
 - CompPDEs
 - ▼ Mixing_Course
 - Large-scale_circulati...
 - Mesoscale_eddy
 - Near-surface
 - Submesoscale_and_...
 - Ocean Dynamics
 - Optimization
 - Turbulence


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, 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: 

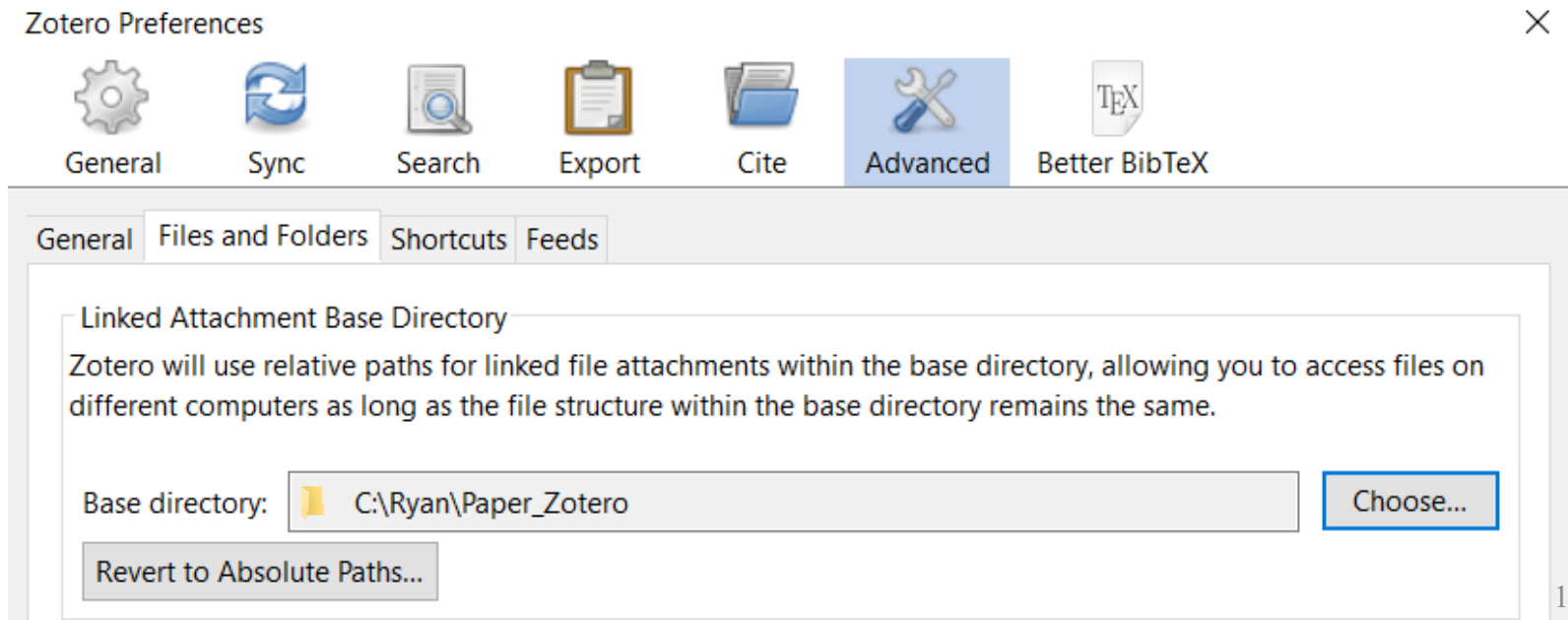
☒ Use subfolder defined by 

Format for all Item Types except Patents

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

Zotfile for syncing over machines

- For free!
- 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
 - 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](#).

Thanks for your attention

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