zotero Tutorial

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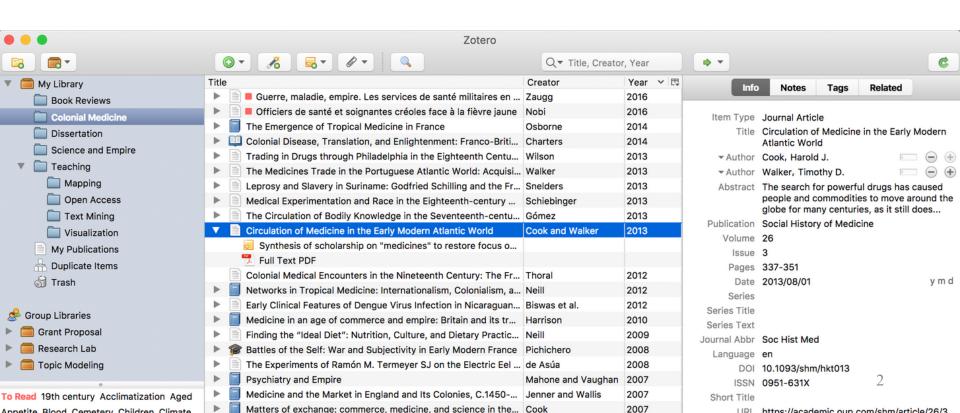
March 31, 2022

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 plan

- I will not cover
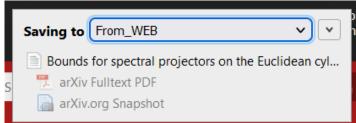 - "How to organize papers"

- 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

Saving to: From_WEB

Bounds for spectral projectors on the Euclidean cyl…
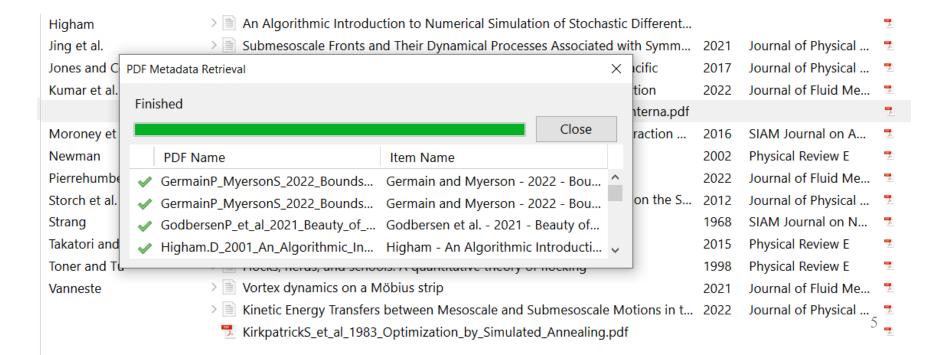arXiv Fulltext PDF
arXiv.org Snapshot

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](#))
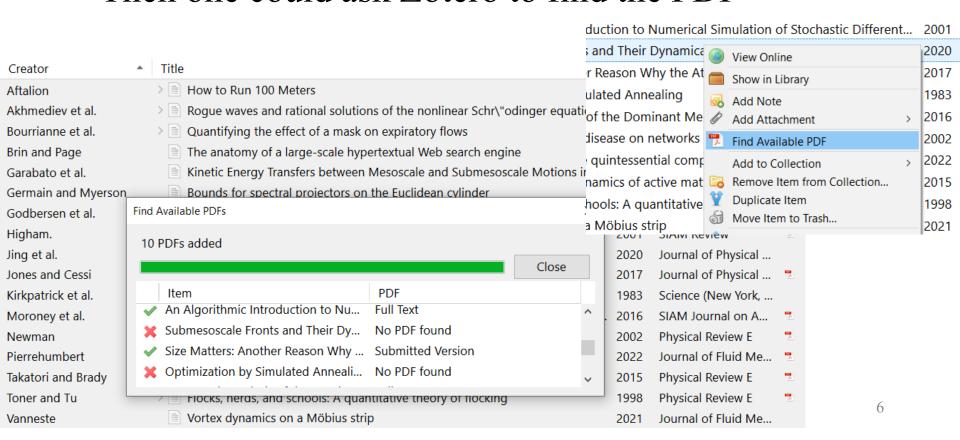
Importing papers: from PDF

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

Importing papers: from .bib

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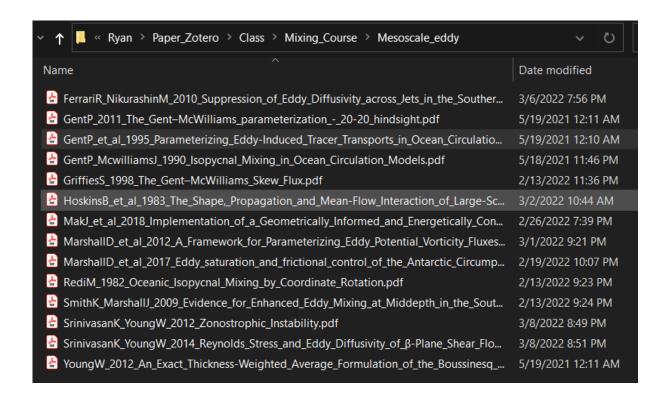- Then one could ask Zotero to find the PDF

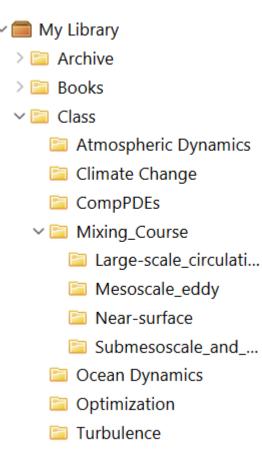# Importing papers: from other software

- From Mendeley: link
- From Endnote: link

Organizing papers: into folders

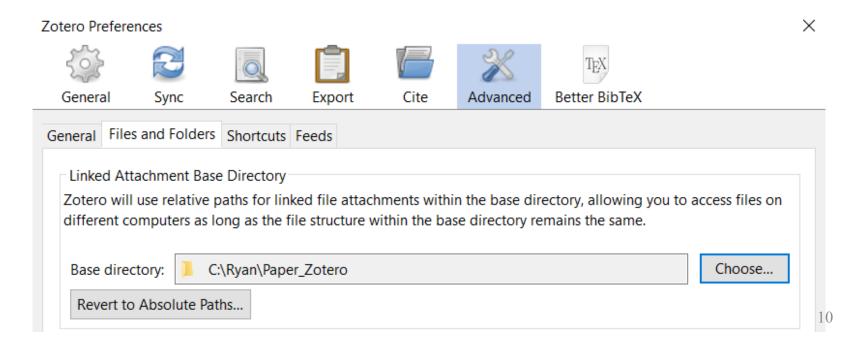- Sort the papers into folders within Zotero and (the PDFs) locally

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: `C:\Ryan\Paper_Zotero`   Choose... ✓

☑ Use subfolder defined by `/%c` ⓘ

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 | both | ⓘ
  Fields to omit from export (comma-separated): | abstract,file,note,keywords
  Include JabRef-specific metadata: | no | ⓘ

  - Generate unique citation keys following preferred pattern

  Citation key format | [authEtAl]_[shortyear]
  ☑ 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