A Brief Introduction to Zotero

Gang Li

Department of Business Administration
Zhongnan University of Economics and Law

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Outline

1. What's Zotero?
   - Problem
   - Options
   - Introduction
2. Why Zotero?
   - Comparison
   - Features
3. How to Install?
   - Set up
   - Configuration
4. How to Use?
   - Basic Usage
   - Advanced Usage

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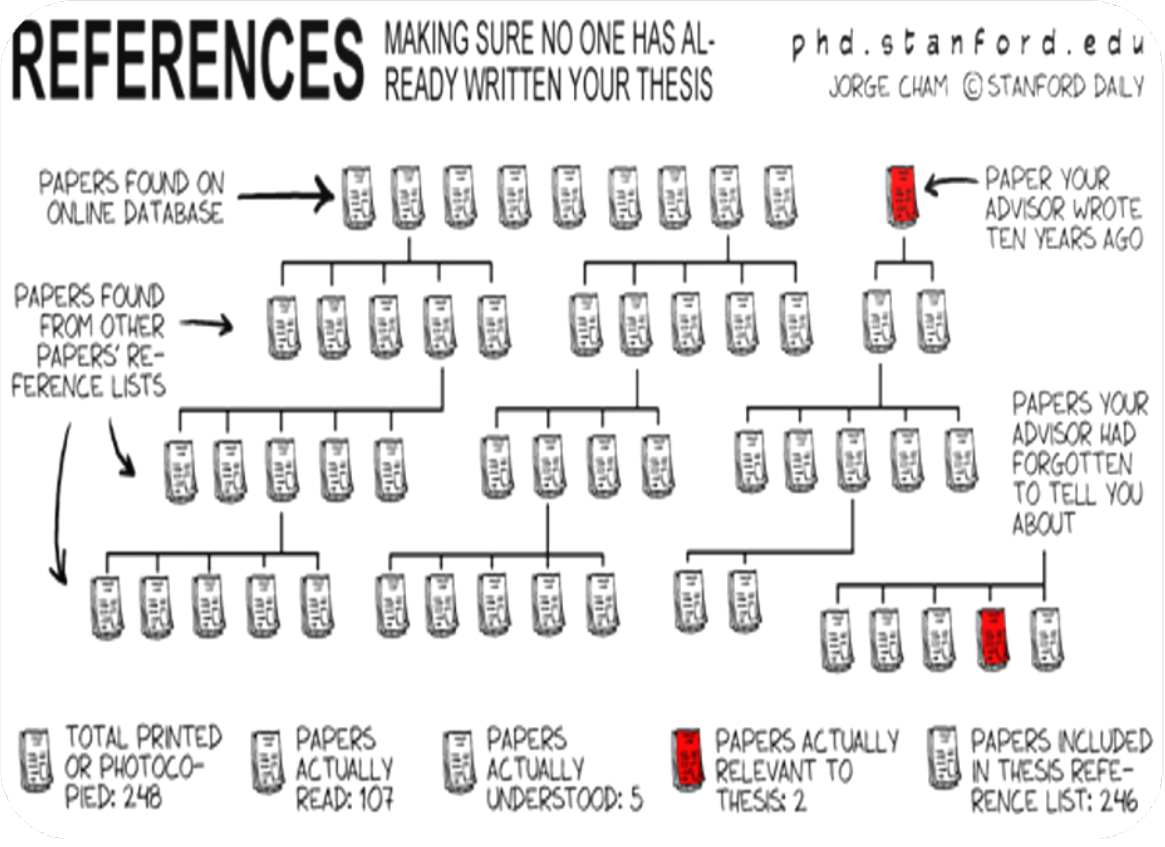
Problem



How many papers must a man read before we call him a man?

Options

- Question: Which one do you perfer?
- My Answer: *Zotero.*

- Zotero is, at the most basic level, a reference manager.
- It is designed to **store, manage and cite** bibliographic references, such as books and articles.
- More broadly, Zotero is a powerful tool for collecting and organizing research information and sources.

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Comparison

	EndNote EndNote Web		Zotero	Connotea	Mendeley Desktop Mendeley Web	
Developer	Thomson Reuters		George Mason University	Nature Publishing Group	Mendeley	
Released	1988		2006	2004	2008	
Cost	Fee-based		Free / Open Source	Free / Open Source	Free / Proprietary	
Latest v.	X5 for Windows X4.0.2 for MAC		2.1.8	1.8	1.0.1 for Windows XP +	
Platform	Desktop	Web-Based	Firefox Plugin + Web Account	Web-Based	Desktop	Web-Based
Key Features:						
• Web Access	No	Yes	Yes	Yes	No	Yes
• Direct Searching Remote / External Databases	Yes	Yes	No	No	No	No
• PDF Management	Yes	Yes (limited)	Yes	No	Yes	Yes
• Save Web Resources	No	Yes	Yes	Yes	Yes	Yes
• Unlimited Size / Space	Yes	No (25,000 Records)	No (100 MB Free)	Yes	No	No (500MB Personal Free)
• Sharing / Collaborating	No	Yes (not publicly)	Yes	Yes	No (but easy web syncing)	Yes
• CWYW	Yes (a strong feature)	Yes	Yes	No	Yes	Yes
• Formatted Bibliographies	Yes (a strong feature)	Yes	Yes	No	Yes	Yes
• Social Bookmarking / Social Networking	No	No	No	Yes	No	Yes
Website	http://endnote.com/		http://www.zotero.org/	http://connotea.org/	http://www.mendeley.com/	

Source: ZHANG Y. Comparison of Select Reference Management Tools[J]. Medical Reference Services Quarterly, Routledge, 2012, 31(1): 45–60. [click here]

Features

1. Free and Open Source
2. Tags
3. Groups
4. LookUp Engines
5. *RSS* Feeds
6. Zotero + Sci-hub
7. Zotero + Web of Science
8. PDF Preview
9. Zotero + Connected Papers

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Set up

1. Download
   - Open the *Download Page*
   - Zotero
   - Browser Extension
2. Install
   - Zotero: click **next** until the installation is complete
   - Extension: If failed, try offline installation
3. Read the *Quick Start Guide*

Configuration

1. Settings
   - Language
   - Microsoft Word Add-in
   - Classic View
2. Useful Extensions
   - ZotFile
     - Advanced PDF management for Zotero
   - Jasminum
     - A Zotero add-on to retrive CNKI meta data
   - ZoteroQuickLook
   - Zutilo
     - Add extra menu items and keyboard shortcuts

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- Layout
  - Left-hand column: arrange collections into folders.
  - Middle column: shows the content of these folders.
  - Right-hand column: browse, and edit the detail of the individual item.

Importing Resources

- Creating folders and searching Zotero
- Adding resources to your collection
  - Adding automatically through web pages
  - Adding by identifier
  - Adding items manually
- Duplicate items

Citation

- Citation Style
  - How to define citation style
  - How to find and add citation style
  - How to modify citation style [Visual CSL Editor]
  - **Trouble: GB/T 7714-2015**
- Multiple Sources
- Creating a Bibliography

Advanced Usage

- Tags
- Groups
- Saved Searches
- LookUp Engines
- *RSS* Feeds
- Zotero + Sci-hub
- Zotero + Web of Science
- PDF Preview
- Zotero + Connected Papers

PyStaData

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Thank you!

AUTHOR: GANG Li
GITHUB: GangLi-0814
BLOG: http://lgspace.top
EMAIL: gang.li@stu.zuel.edu.cn