Zotero for Research: Insights into Managing Sources

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Northeastern University
NULab for Texts, Maps, and Networks

Feel free to ask questions at any point during the presentation!

Module Outline

- Objectives
- Why are citation management tools useful?
- Introduction to Zotero
- Important Zotero vocabulary
- Tutorial - How to add sources to Zotero

Slides & handout available at

http://bit.ly/diti-spring2020-robson

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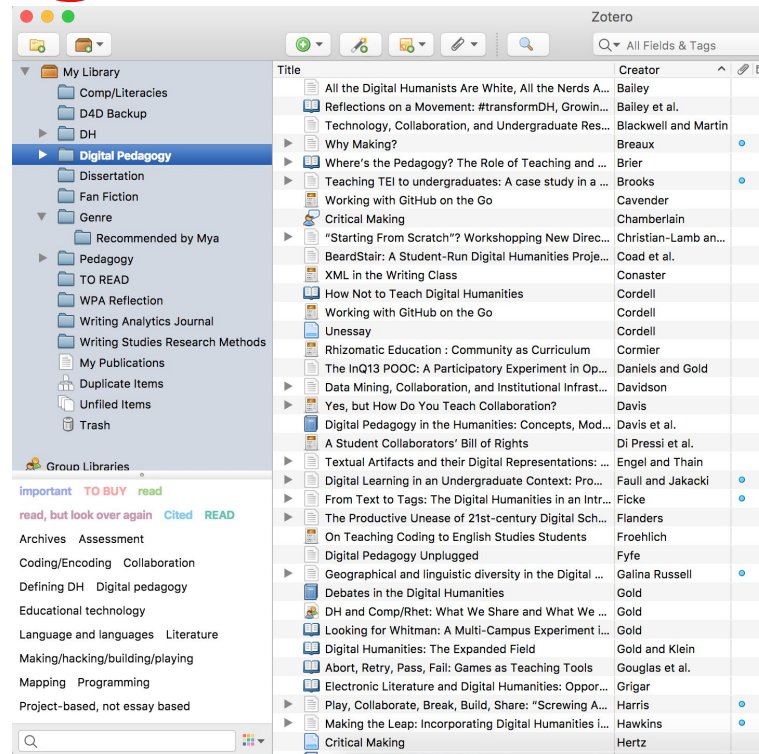
Module Objectives

- Understand how to use a citation management software to organize research materials
- Understand Zotero's functions and features
- Define several important functions of Zotero and citation management, including libraries, ISBN, tags, and more.
- Input bibliographic information both manually and automatically into Zotero
- Transfer a library into a Works Cited page

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Why Use Citation Management Tools?

Citation management tools provide researchers with the ability to organize their primary and secondary sources, easily create citations and works cited pages for their research, and organize/maintain notes.

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What is Zotero?

"Zotero is a free, open-source research tool that helps you collect, organize, and analyze research and share it in a variety of ways" ("About", Zotero).

- Store citation information on a cloud
- Finds bibliographic information for a source
- Provides flexible methods for organizing your bibliographies (libraries, tags, notes, etc)
- Stores PDFs (even annotated PDFs!) or links to the source
- Provides outputs of your citation information
- Connects to GoogleDrive, Chrome, Microsoft Word, and other applications

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Install Zotero
Create an Account

https://www.zotero.org/

**IMPORTANT: Your zotero libraries and info are stored in your Zotero *account* (not on your computer)

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Anatomy of Zotero

Toolbar

Your individual and group libraries

Information about an individual source

Your chosen keywords to tag each source

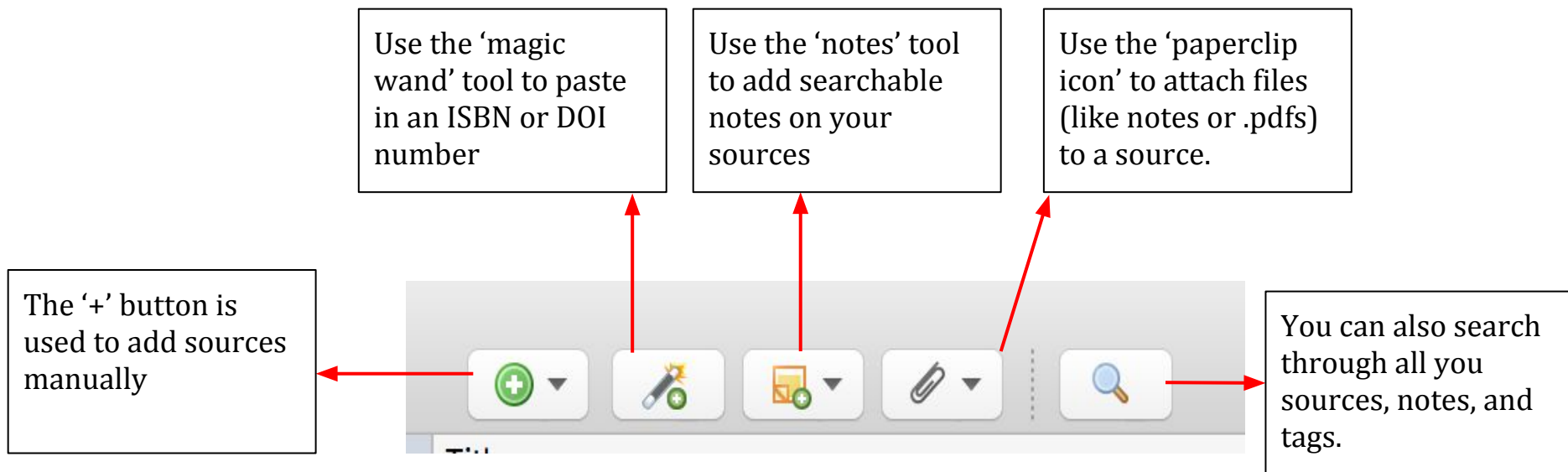Your list of sources in a particular library

at any point ...ation!

Zotero Vocabulary

Knowing the vocabulary of a particular tool makes looking up documentation significantly easier.

- **Library**: the folders that store your citation lists
- **My library**: your individual libraries that can only be edited on your account
- **Group libraries**: collaborative libraries
- **Info**: the bibliographic info about a particular source
- **Notes**: your own notes taken about a source
- **Tags**: keywords chosen to organize and arrange sources
- **DOI**: unique identifier of scholarly articles, such as 10.2307/358774
- **ISBN**: unique identifier for books (can be 10 or 13 numbers, such as 978-0809335541)

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Zotero Toolbar

Use the 'magic wand' tool to paste in an ISBN or DOI number

Use the 'notes' tool to add searchable notes on your sources

Use the 'paperclip icon' to attach files (like notes or .pdfs) to a source.

The '+' button is used to add sources manually

You can also search through all you sources, notes, and tags.

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Zotero's Bibliographic Metadata

Info: bibliographic info

Notes: your notes (also sometimes notes are included when you enter ISBN numbers)

Tags: keywords (also sometimes keywords are included when you use ISBN numbers)

Related: choosing other sources that may be related

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How to Import Sources

There are three main methods of adding sources to Zotero:

1. Manually inputting bibliographic data - This is the slowest option, but necessary for some sources, especially older sources or unusually formatted sources.
2. Dragging & Dropping - This is the easiest method of adding sources for those that you already have locally stored on your computer - **Be sure to double-check metadata!**
3. Browser extension - The easiest method of adding sources from online databases - **Be sure to double-check the metadata!**

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Inputting Information Manually

1. Select the "New Item" button and find the type of source the article is
2. Input as much of the bibliographic information as you can
3. Use the "Notes" to keep track of important information (we will talk about this more in a second)
4. Use the "tags" to create keywords. Do not overload yourself with keywords. They should be chosen with purpose to help find similar content and organize your sources, not overwhelm you

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Drag and Drop PDFs for Biblio Data

If you already have a PDF of an article downloaded, you can **drag** and **drop** the PDF to Zotero and it will immediately input all the information.

The PDF, however, needs to have metadata attached to it; not every PDF will, but most you get from library databases should.

If dragging & dropping does not automatically add bibliographic data, you will have to do so manually.

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Zotero Web Browser Extension

If you use Chrome or Firefox, there is a **Zotero extension** that you can download onto your browser and connect to your Zotero account. When you're researching articles, you can easily save your bibliographic information by clicking on the "Zotero" button on your toolbar (just make sure it's being saved to the correct library!). It will also save the HTML link or the PDF.

Always double check that the citation information is correct in your Zotero library (some websites do not provide proper metadata)

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Exporting your Bibliography

1. As a bibliography saved directly into your clipboard
    a.   Right-click your library
    b.   Click "Create bibliography from collection"
    c.   Choose your proper citation format
    d.   Paste the bibliography in your works cited page

2. As a CSV file (which can be opened on Excel) if you're ever interested

3. Export it to other Citation Management (EndNotes, for example)

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Zotero on Google Docs and Word

Your Zotero can now be connected to your Google Drive account or Microsoft Word. While you are writing a paper, you can use the Zotero plugin to create your bibliography for you!

Always proofread and double-check that all the bibliographic information is correct and follows the proper citation format

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Zotero Assignment

- Download Zotero: https://www.zotero.org/
  - If you are already using a different citation management software, you may use that as well.
- Add five sources (at least two peer-reviewed) you will be using for your research paper to Zotero (or other citation management software).
- Create at least two tags for your new sources.
- Take a screenshot of Zotero with the sources and tags added.
- For more help & info: http://subjectguides.lib.neu.edu/Citations

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Thank you!

If you have any questions, contact us at:

Garrett Morrow
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Have Questions about Zotero? DITI office hours: **bit.ly/diti-office-hours**
Due to NEU shift to online, office hours will be held via Skype

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