Zotero for Research: Insights into Managing Sources

Digital Integration Teaching Initiative
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History of Boston
Professor Uta Poiger, Fall 2025

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Class Discussion: Managing Sources

Setting up a system to keep track of your sources is an important first step for academic research. Let's think about these questions:

- How do you manage your sources when you are doing research?
- Where do you look for sources?
- How do you save your sources?
- How do you remind yourself what each source is about and how you plan to use it?

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Workshop Agenda

- Objectives
- Why are citation management tools useful?
- Introduction to Zotero
- Important Zotero vocabulary
- Tutorial
- In-class hands on activity with Zotero
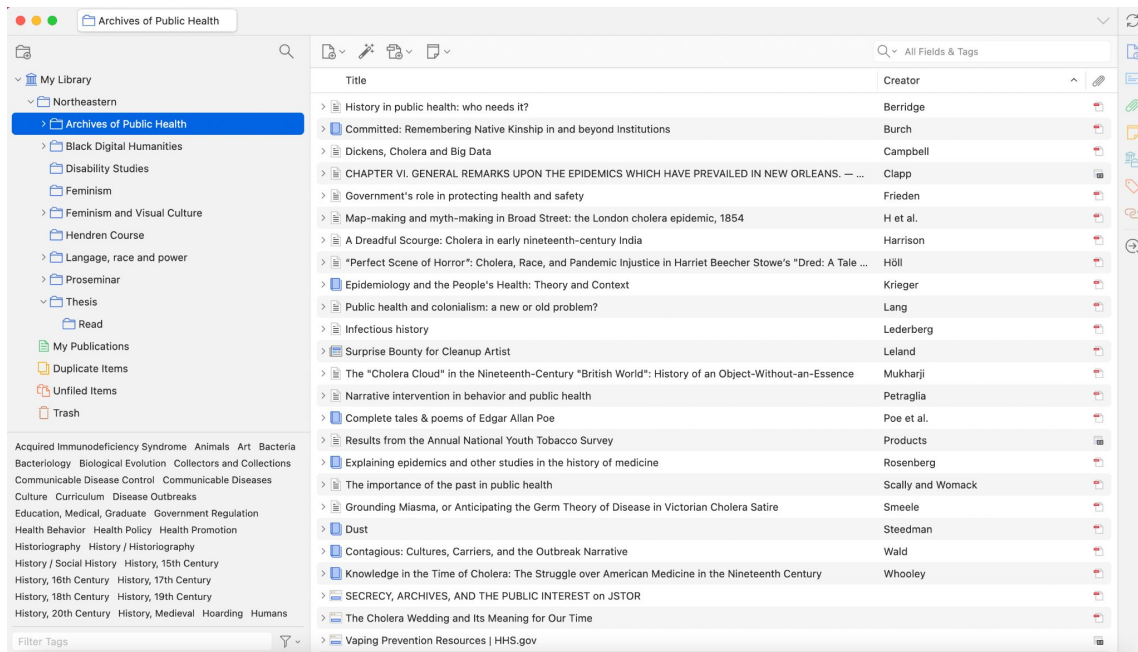
Slides & handout available at

https://bit.ly/fa25-poiger-hist1232-multi

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Workshop Objectives

- Understand how to use 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
- Transform 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).

- Stores citation information on the cloud
- Finds bibliographic information for sources
- 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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Introduction to Zotero

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Instructions on Installing Zotero

- Install Zotero
  - Download Zotero on the [Zotero download webpage](). Be sure to also install the Zotero Connector for your browser.
  - **Mac:** Open the .dmg you downloaded and drag Zotero to the Applications folder. Then run Zotero from the Applications folder and add it to your Dock. After installing Zotero, you can eject and delete the .dmg file.
  - **Windows:** Run the setup program you downloaded.
- Create an Account
- **Note:** Your Zotero libraries and info are stored in your Zotero account as well as on your computer (depending on your device's storage capacity).

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Zotero Vocabulary

Here's some tool-specific vocabulary to know when navigating Zotero:

- **My library**: individual libraries that can only be edited on your account
- **Collection:** Folder-like organization for sources that can be grouped by course, topic, project, etc. Items can be copied to multiple collections.
- **Sub-collection:** Folder nested within a main collection
- **Group libraries**: collaborative libraries
- **Info**: the bibliographic information about a particular source
- **Notes**: your own notes taken about a source
- **Tags**: keywords chosen to organize and arrange sources

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Zotero Anatomy

Toolbars

Your individual & group libraries

Your keyword tags

Your list of sources in a particular library

Information about an individual source

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Demo

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Collecting Sources

Zotero is most useful when you are collecting sources. So, let's talk about finding appropriate sources.

What are **databases**, **journals**, and **peer-reviewed articles**?

- [Northeastern Library](#)
- [Subject Guides](#)
- [Northeastern Databases](#)

For your analysis paper, you found three websites that you cited in your paper related to your reflections.

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Option 1: Add by Identifier

The easiest way to add sources to either a personal or group library is to "add by identifier" using the magic wand button in the top menu bar. You can add sources by entering the:

- ISBN: international standard book number
- DOI: digital object identifier
- PMID: PubMed identifier
- arXiv ID: from repository of electronic preprints & postprints
- ADS Bibcode: from NASA ADS Abstract and Service database

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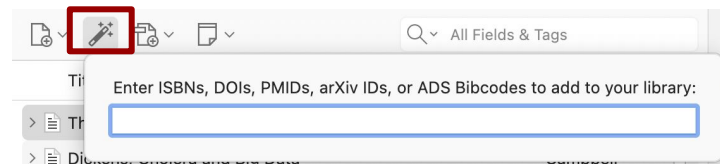
Option 2: Drag and Drop PDFs

If you already have a PDF of an article downloaded, you can **drag** and **drop** the PDF to Zotero and it will automatically fill in all the information for that document. Note: Information pulled may be incomplete or not fully accurate, so always double-check.

The PDF, however, needs to have metadata attached to it. Make sure to check because not every PDF include this information, but most of the ones you get from library databases should.

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Option 3: Input Information Manually

1. Select the "New Item" button and select source type
2. Enter bibliographic information
3. Use the "Notes" field to keep track of important information
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.

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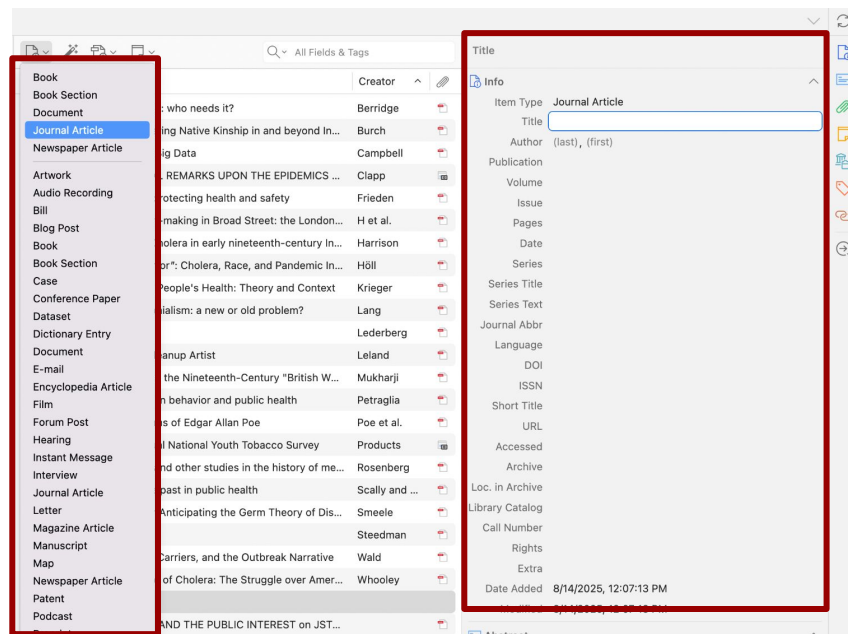
Zotero Web Browser Extension

- In Chrome or Firefox, there is a **Zotero browser extension** that you can download and connect to your Zotero account. Then you can easily save bibliographic information by clicking on the "Zotero" button on your toolbar (make sure the correct library is selected from the dropdown). It will also save the HTML link or the PDF.
- **Note:** Always double check that the citation information is correct in your Zotero library (some websites do not provide accurate metadata)

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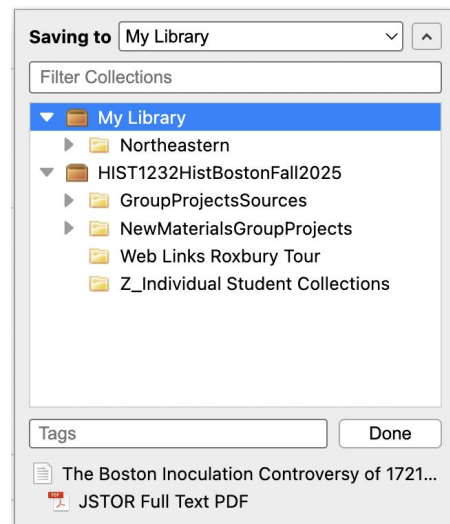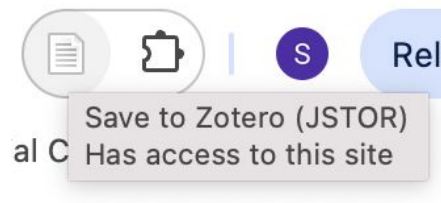
Practice Adding Items

1. In your Zotero dashboard, create a working folder in your library
2. Look for the DOI number (unique identifier for scholarly articles) or ISBN number (unique identifier for books)
3. Click "Add Items by Identifier(s)" and paste the DOI or ISBN number

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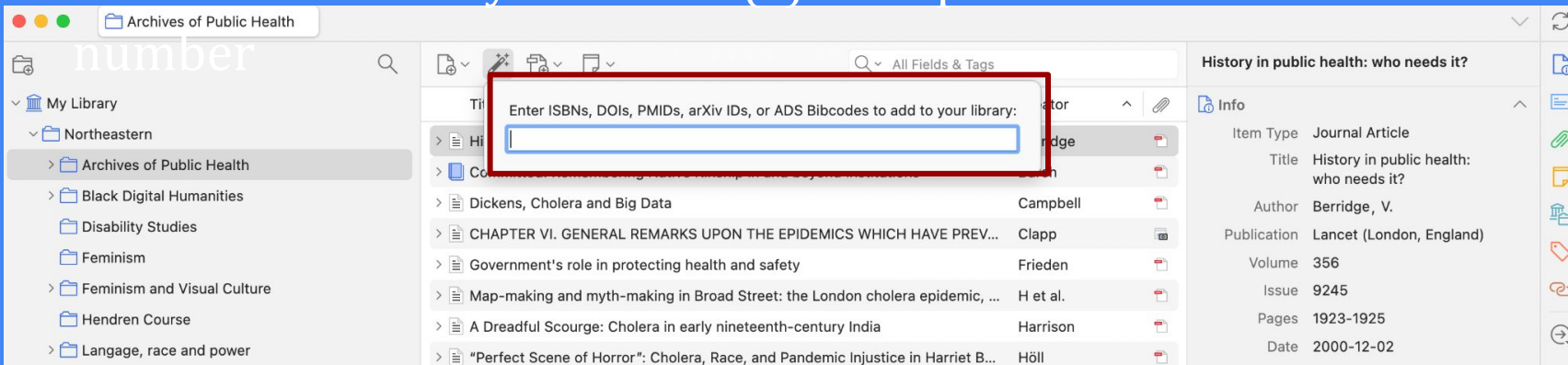
Practice Inputting Manually

Now, let's practice adding a class reading: Michael Rawson, *Eden on the Charles*. In your personal library folder:

- Determine the type of source
- Find the correct citation information
- Fill out the information
- Attach the PDF by dragging and dropping the file onto the related source
- Extra practice- Add an item you can't import: <u>Macbeth</u>

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Bibliographic Metadata

Info: bibliographic info

Notes: your notes (also sometimes notes/tags are included when you enter ISBN/DOIs)

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

History in public health: who needs it?

Info	⌄
Item Type	Journal Article
Title	History in public health: who needs it?
Author	Berridge, V.
Publication	Lancet (London, England)
Volume	356
Issue	9245
Pages	1923-1925
Date	2000-12-02
Series	
Series Title	
Series Text	
Journal Abbr	Lancet
Language	eng
DOI	10.1016/S0140-6736(00)03271-2
ISSN	0140-6736
Short Title	History in public health
URL	
Accessed	
Archive	
Loc. in Archive	
Library Catalog	PubMed
Call Number	
Rights	
Extra	PMID: 11130400
Date Added	1/15/2025, 4:58:34 PM
Modified	1/15/2025, 4:58:36 PM

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Zotero Reader: Annotations

Zotero allows you to annotate your materials within the application. Within the PDF viewer, you can:

- Highlight or underline text
- Add sticky notes or text
- Create snapshots
- Draw (great for tablets)
- Extract annotations as a Zotero note
- Or, add your own "Note" linked to the PDF as part of the sources info

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Zotero Group Library

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Collaborating in a Group Library

Best practices (from [UC Berkeley Library Guide](#))

- Create a personal library as a holding zone for references. Clean up the metadata here before adding it to the group library.
- Use tags to label papers so you can easily identify and gather items
- Before you start work, sync your library so you are working with the most recent version
- Rename your PDF files to formats that include citation information for easier identification

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Accessing the Group Library

Professor Poiger has created a group library for your class to collaborate and gather sources related to your projects. Once you've shared your Zotero username with Professor Poiger, you should receive an email from Zotero inviting you to the Group. Follow the link to Zotero and you should see the new group appear in your left side panel.
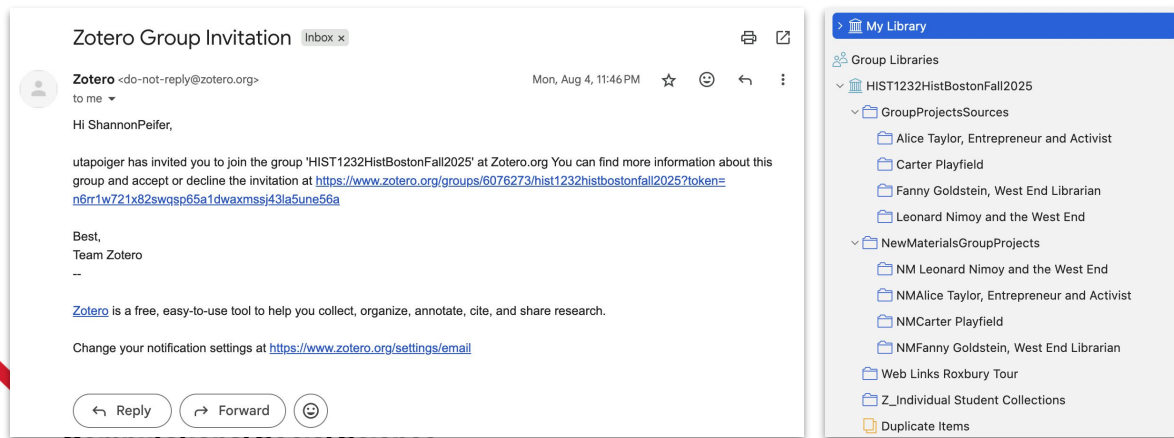
Practice Working in a Group Library

1. Add the paper you brought for class to your individual library
2. Clean up metadata
3. Rename file with metadata information (if necessary)
4. Sync group library to ensure working with up-to-date version
5. Copy to the group library
6. Tag appropriately
7. Add annotations
8. Sync changes

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Setting Preferences

Before you start working with Zotero, check that your preferences are set up how you want.

- Edit appearance
- Manage file attachments and metadata
- Customize File renaming
- Set Reader preferences
- Allow automatic tags

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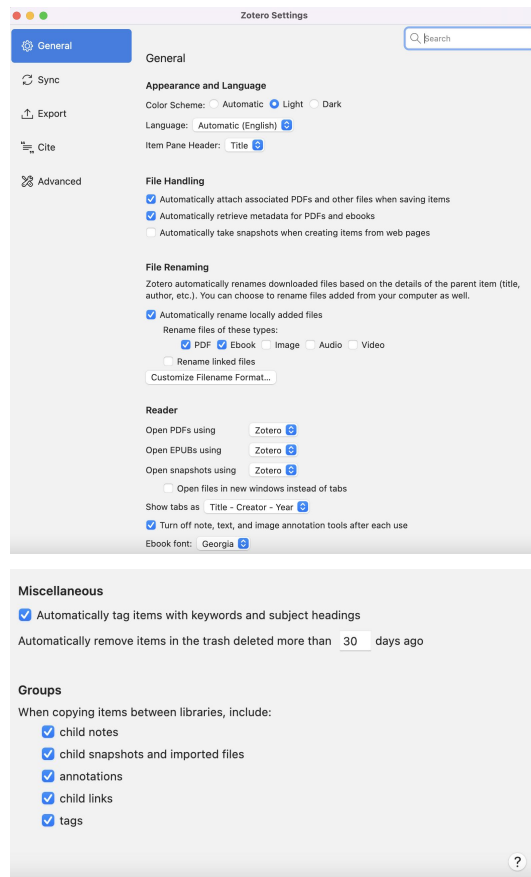
Setting Preferences: Exporting

You can also set your preferences for exporting items from your library.

- For "Quick Copy," select the appropriate citation format.
- This is helpful for when you copy selected items to your clipboard and paste the citations directly into Word, Google Docs, etc.

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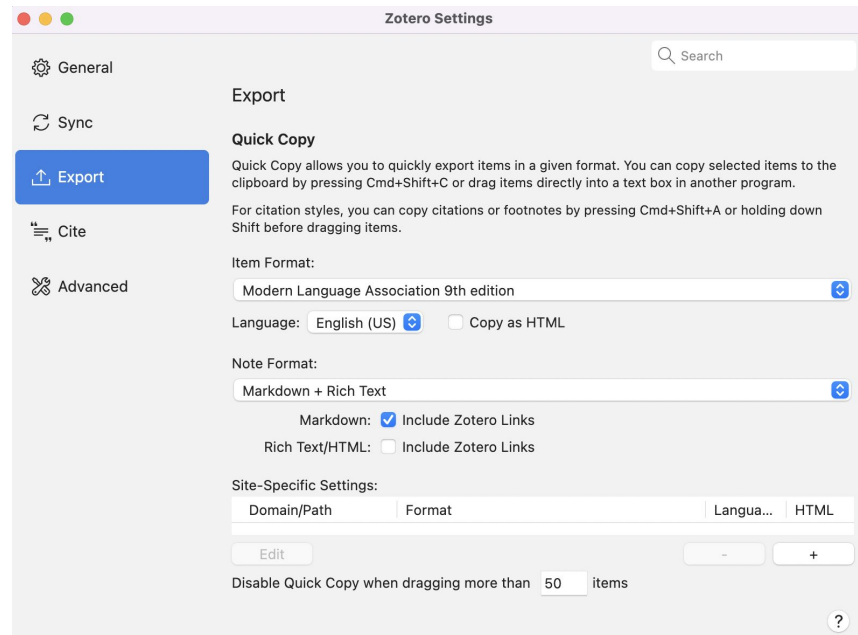
Exporting your Bibliography

1. As a bibliography saved directly into your clipboard
   a. Right-click (PC) or Command-select multiple items (Mac) from your library
   b. Select "Create bibliography from collection"
   c. Choose your citation format
   d. Paste the bibliography into your works cited or references page
2. As a CSV file (which can be opened in Excel)
3. As an export to other Citation Management tool formats (EndNotes, for example)

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Zotero with Google Docs and Word

Your Zotero can 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 or add footnotes for you!

Note: Always double-check that all the bibliographic information is correct and follows the appropriate citation format (You can set this in your preferences.)

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Class Discussion

- What did you find helpful about using Zotero?
- What did you find challenging about using Zotero?
- How might you use Zotero in the future outside of this class?

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Additional Resources

- Zotero Support Documentation and Forum:
  - [Support Documentation](#)
  - [Discussion Forums](#)
- [Northeastern Library Subject Guide](#)
- [Additional plug-ins](#)

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Thank you!

— **Taught by DITI Fellows** Dipa Desai, Shannon Peifer, and Mel Williams

—**Developed by** Cara Marta Messina, Juniper Johnson, Shannon Peifer, and Mel Williams

- Course materials: https://bit.ly/fa25-poiger-hist1232-multi
- Schedule an appointment with us! https://bit.ly/diti-meeting
- To give us feedback: https://bit.ly/diti-feedback
- If you have any questions, contact us at: nulab.info@gmail.com

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