Zotero for Research: Insights into Managing Sources

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Northeastern University
NULab for Texts, Maps, and Networks

Class Discussion: Managing Sources

Break into small groups and talk amongst yourselves for five minutes; choose one person to report back to the larger group. 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?

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

Workshop Agenda

- Objectives
- Why are citation management tools useful?
- Introduction to Zotero
- Important Zotero vocabulary
- Tutorial
- In-class hands on activity with Zotero
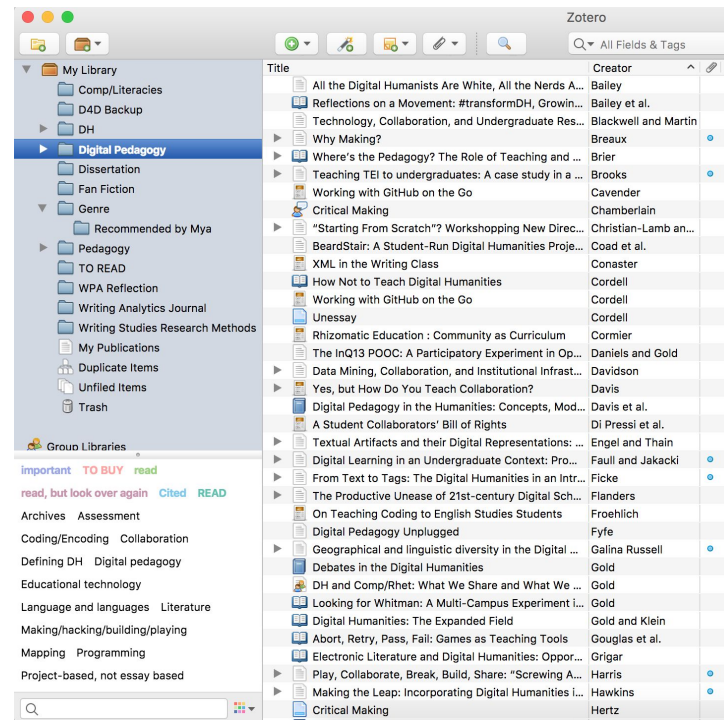
Slides & handout available at **http://bit.ly/diti-spring2020-kim1**

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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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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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Toolbar

Your individual and group libraries

Your chosen keywords to tag each source

Information about an individual source

Your list of sources in a particular library

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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 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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Before we use Zotero:

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: https://library.northeastern.edu/
- Subject Guides: https://subjectguides.lib.neu.edu/
- Northeastern's Databases:
  https://library.northeastern.edu/research/resources/a-to-z-index

Choose a database and search for an article related to your research.

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Practice Using Zotero

In your Zotero dashboard, create a folder titled "Class Tutorial" (you can delete this later). Look for the DOI number (unique identifier for scholarly articles, ex: 10.2307/358774) or ISBN number (unique identifier for books, ex: 978-0801497643) for the article that you found online

Click the "Add Items by Identifier(s)" and paste in the DOI or ISBN number

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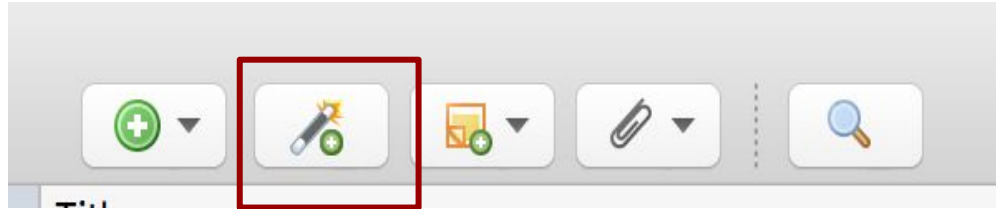
Zotero's Bibliographic Metadata
Search ISBN 978-0801497643

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)

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Inputting Information Manually

1. Select the "New Item" button and select the type of source that you have
2. Enter as much of the bibliographic information as you can
3. Use the "Notes" field 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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Demonstration: Inputting Manually

In your "Class Tutorial" folder, open up the readings sent over via email (Adcock & Collier, 2001; Lazer & Radford, 2017). We will:

- Figure out the correct citation information
- Determine the type of source
- Fill out the information from there
- Attach the PDF by dragging and dropping the file onto the related source

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

Drag and Drop PDFs for Bibliographic Data

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.

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

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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 citation format
   d. Paste the bibliography into your works cited or references page
2. As a CSV file (which can be opened on Excel)
3. As an export to other Citation Management tool formats (EndNotes, for example)

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

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Your Turn!

As a group, work in your "Class Tutorial" folder to use Zotero's features and/or manually input information for:

- Any *New York Times* article
- The two readings provided via email (Adcock & Collier, 2001; Lazer & Radford, 2017)
- Singleton, Royce A., and Bruce C. Straits. *Approaches to Social Research*. Oxford University Press, 2017.

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Class Discussion

- First of all, any general questions?
- What did you find easy or challenging about using Zotero?
- How might you use Zotero in the future outside of this class?

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

Thank you!

If you have any questions, contact us at:

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Schedule an appointment with us! **http://bit.ly/diti-office-hours**

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