

USING ZOTERO FOR CITATION MANAGEMENT

WINTER 2020

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AGENDA FOR TODAY'S WORKSHOP

1. Introduction
2. Citation Management Using Zotero
3. Common problems and some tips
4. Questions
5. Exercise for you: Master Zotero In 20 Challenge
6. Wrap-up



TELL US ABOUT YOURSELF

1. About the Co-Instructors
2. What is your name and area of study?
3. What do you know about citation management?
4. What are your main concerns about Zotero?
5. Other concerns about citation management?



SERVICES AT THE RESEARCH COMMONS

WORKSHOP

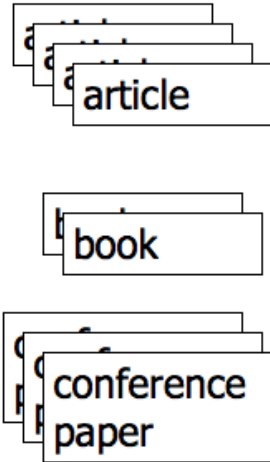
- Citation Management (Mendeley, Zotero, and RefWorks)
- Thesis Formatting
- Data analysis software support (NVivo, SPSS)
- Digital Core Skills & GIS

ONE-ON-ONE CONSULTATION

(over Zoom or by e-mail)

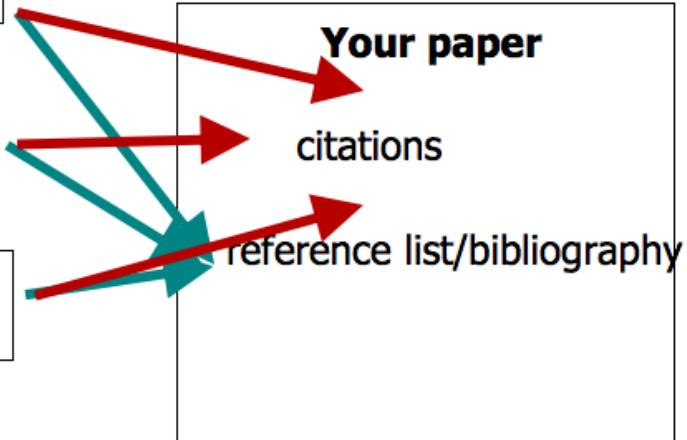
WHAT IS THE PROBLEM?

Your topic:

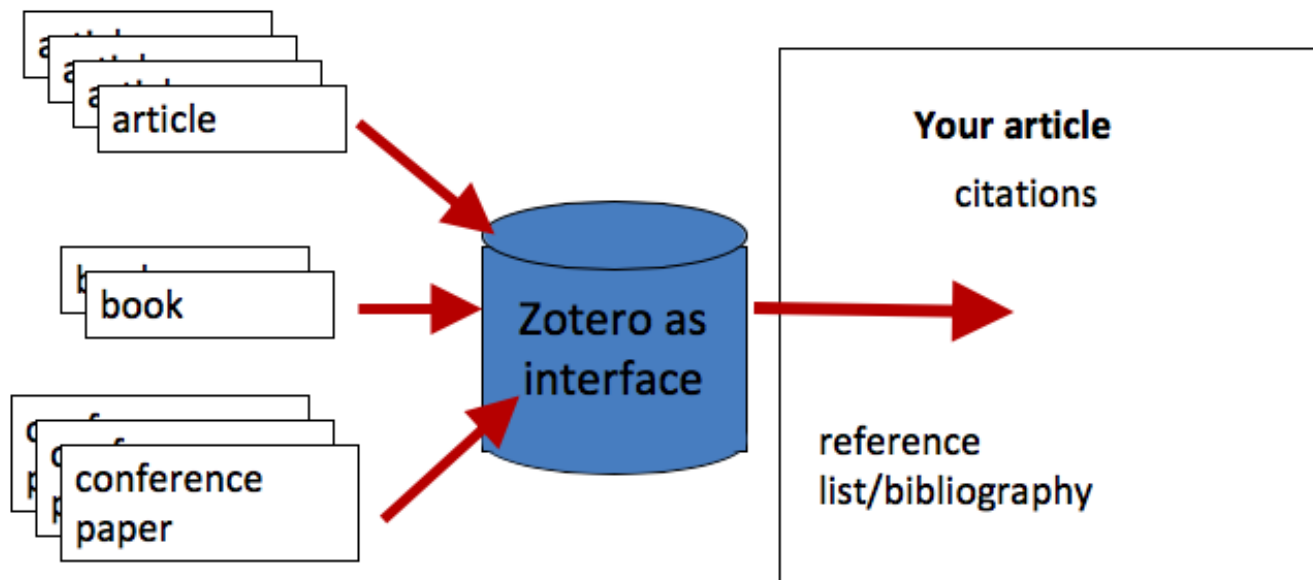


Creating Citations Manually

- Lots of typing
- Lost references
- Mistakes
- Static (neither changeable nor updateable)
- Too many details in styles



ZOTERO AS A SOLUTION



WHAT YOU CAN DO? – 4 IMPORTANT FEATURES



Collect references from different sources



Organize your database (annotate, rate, tag)



Cite and generate bibliographies.



Share references and collaborate with colleagues

CITATION MANAGEMENT TOOLS COMPARISON

	Zotero	Mendeley	Endnote	RefWorks
Price	Free	Free	\$250 USD (Student version available for \$150 USD)	Free for UBC students/faculty/alumni; \$100 otherwise
Free space (as of Oct. 2019)	300 MB (2GB ~ \$1.67/month)	2 GB (5 GB ~ \$4.99 /month)	Unlimited	Unlimited
PDF annotation and reader	No (use plug-ins like Zotfile)	Yes	Yes	Yes
Snapshot	Yes	No	Yes	No
Retrieve PDF citation data	Yes	Yes	Yes	Yes
Full Text PDF search	Yes (activate in settings)	Yes	Yes	No
Mobile	Yes (with 3 rd party apps)	Yes	iOS only	No (Mobile interface)



CITATION MANAGEMENT TOOLS COMPARISON

	Zotero	Mendeley	EndNote	RefWorks
Personal Profile	Yes	Yes	Yes	No
Private group	Unlimited (groups & members)	Yes (Free accounts: 2GB storage, limits on how many groups free users can make and join)	Yes	Yes
Public group	Unlimited	Unlimited	Yes	Yes (within UBC)
Social network (follower & following lists)	Yes	Yes (has a like button)	No	No
Collaboration newsfeed	Yes	Yes	Yes	No
Group page and discussion forum	Yes	Yes	No	No



INSTALLATION AND SET-UP

Download and install Zotero:

- ☐ Download and install MS world plugin
- ☐ Add the browser extension (for standalone version)

Set up your Zotero account:

- ☐ Set your Zotero account with Zotero on your computer



STEP 1 – COLLECT AND ADD REFERENCES

To capture and add references, import:

- ☐ Directly from Google Scholar
- ☐ From the Library search / Summon
- ☐ From online article databases

Some citations may need to be manually added

- ☐ PDFs can also be added (manually)



STEP 2 – ORGANIZE YOUR LIBRARY

- ☐ Create folders and subfolders
- ☐ Add notes, tags, and comments
- ☐ Add an attachment (PDF or Image)

STEP 3 – CITING AND GENERATING BIBLIOGRAPHIES

- ☐ Add in-text citations and bibliography in MS Word
- ☐ Add in-text citations and bibliography in Google Doc
- ☐ Citation in an email and presentation
- ☐ Select preferred citation style



STEP 4 – SHARE REFERENCES AND COLLABORATION

To share and collaborate:

- ☐ Create a Group folder and share your documents



COMMON PROBLEMS THAT COME UP WITH ZOTERO

- ☐ Incompatible plugin
- ☐ Zotero toolbar doesn't appear
- ☐ Debugging broken documents
- ☐ Communication error or non-responsive plugin buttons

REMINDER: ZOTERO IS NOT PERFECT

- Remember, Zotero is a helpful tool but not perfect. Ultimately it is up to you to make sure all of your citations are formatted correctly.
- Double check your bibliography! Make sure all relevant and correct information about each source has been added and entered properly.

SOME PRACTICE -- MASTERING ZOTERO IN 20 STEPS

- An activity for you to master Zotero
- Please contact us for the answer key



THANK YOU!



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