# ZOTPAD USER MANUAL

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# *Introduction*

ZotPad is an iPad/iPhone client for Zotero reference management software. The purpose of ZotPad is to allow accessing Zotero libraries from mobile devices. Using Zotero can be divided into three tasks, collecting articles and other material from the internet; reading, organizing, and making notes of the collected material; and citing the collected material in one's own writing. The purpose of ZotPad is to allow doing the reading, organizing, and note taking part on a mobile device. Users who are looking for a solution to add items will probably find the Zotero bookmarklet a nice solution: `https://www.zotero.org/bookmarklet/bookmarklet.html`

The version 1.1 of ZotPad is focused on working with attachment files. Files can be read with the built-in QuickLook viewer, sent to other apps for annotating, and shared by email. The recommended way to synchronizing files between ZotPad and Zotero is to use Zotero file storage service, but ZotPad also supports WebDAV and Dropbox. ZotPad is designed to be always connected with the Zotero server and does not need to be synchronized in the same way as Zotero. If network connection becomes unavailable, ZotPad will automatically start using a local cache instead.

# *Getting started*

ZotPad is designed to be intuitive to use if you have experience with Zotero. When you launch the app for the first time, ZotPad will open a page from the Zotero website prompting for your Zotero username and password, as shown in Figure . If you navigate away from the authentication workflow, you can go back by tapping the **Back to start** on the top right.

The username and password are transmitted securely and only the username is stored by ZotPad.

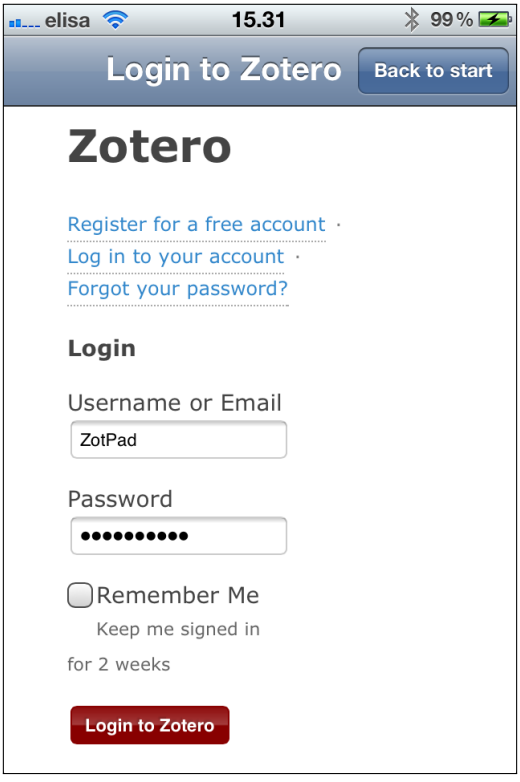


Figure 1: Log in to Zotero

After you have successfully logged in, you are directed to a page with a title "New Private Key" shown in Figure . This page will create a key that ZotPad uses to access your Zotero library. Tapping **Accept Defaults** will give the key read and write access to your personal library and all the groups that you belong to and is the recommended option.

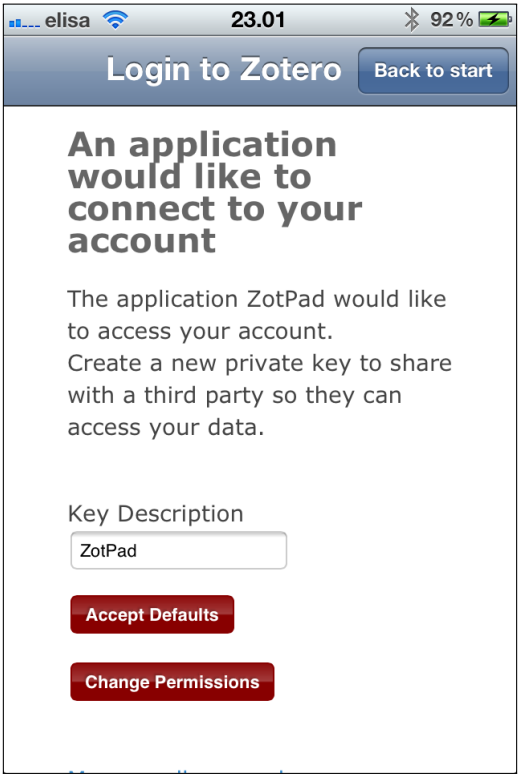


Figure 2: Create access key

If you are using Zotero file storage, ZotPad is now fully configured and ready for use. Using WebDAV or Dropbox to synchronize your files is described later in the user manual.

# *User interface*

This chapter explains the ZotPad user interface and describes how ZotPad is used.

## *Library and collection view*

The first wiew is a list of libraries. Tapping a library activates that library and shows the items from the library. The blue buttons can be used to navigate the collections in the libraries. Tapping the gear button will show the ZotPad log and support options. The log view is discussed later in the user manual. Figure  shows the user interface after the activating Group Library 1.

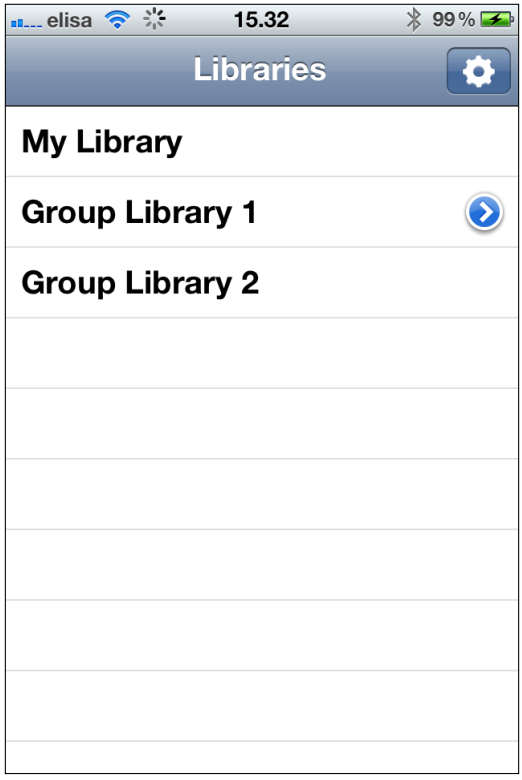


Figure 3: Main user interface

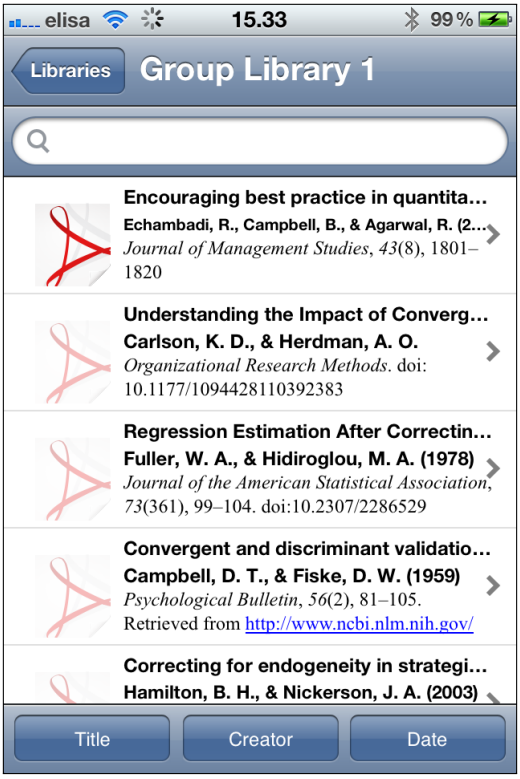


Figure 4: Item list

## *Item list view*

The item list view shows the list of items in the selected library or collection. The item list shows basic citation information formatted according to the APA style. Tapping an item will open that item in the item detail view.

Instead of showing icons about item types like Zotero, ZotPad shows the file type icon for the first attachment. These icons are initially disabled (grayed out) and become active once a file for the first attachment has been downloaded. Tapping on an active file type icon will open the first attachment in reading mode.

The item list view has two functions: searching and sorting. Search is shown in Figure . The search function has currently two limitations: First, although ZotPad downloads and views attachments, these are not indexed for full text search. In other words, the search uses only the item fields, not

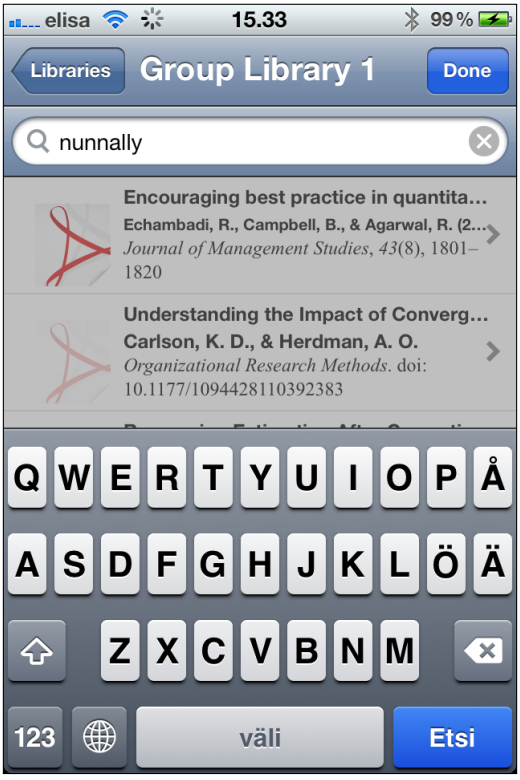


Figure 5: Searching item list

content of the attachment files. Second, the search is a phrase search. This means that if you type "nunnally 1978" (without the quotes), the search will match only items containing the exact phrase "nunnally 1978", but not items that match the word "nunnally" and "1978" only separately. Both limitations will be removed in the future.

Sometimes it is possible to see a search returning items that are showing as loading from Zotero server, but then disappear. This is caused by differences in how search is implemented in the Zotero server and in ZotPad. A more detail description of why this happens can be found later in the user guide in the chapter "Technical information".

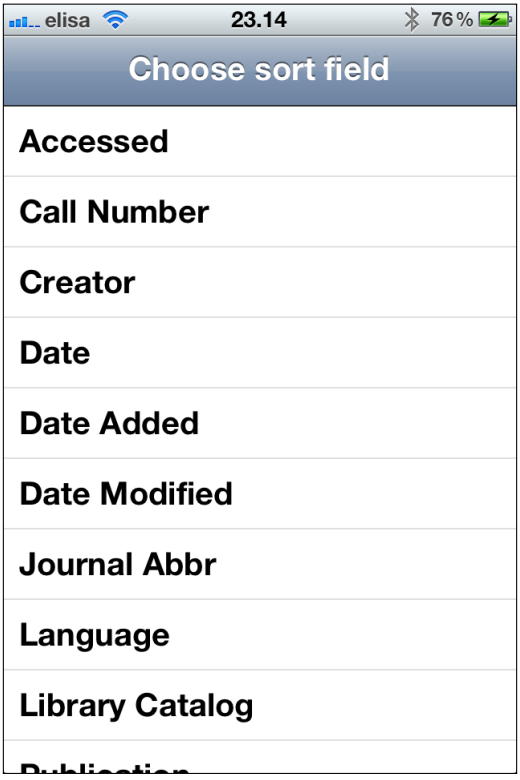


Figure 6: Configuring the sort buttons

The item list can be sorted with the 3 buttons below the item list view. The buttons are preconfigured with the most commonly used sorting criteria. Any of the buttons can be reconfigured to use a different criterion by tapping and holding the button. Configuring sort buttons is shown in

Figure . Tapping a button will sort the list in ascending order and tapping the same button again will switch between ascending and descending order.

### *Item detail view*

Tapping an item in the item list view opens the item detail view shown in Figure . The item detail view contains two sections. The first section shows all attachments in a carousel and the second section below the attachments shows the item fields. Editing the item fields is not implemented in ZotPad 1.1, but will be added in a later version.

The attachments in the carousel will initially show file type icons. These will be replaced with document previews for PDF files after the files have been downloaded on ZotPad. Tapping on an attachment that is not yet downloaded will start downloading the file. Tapping a file that has already been downloaded will open the file in QuickLook for reading as shown in Figure . The reading view cannot currently show PDF annotations and has some other limitations as well. These limitations can be avoided by using a third party PDF reader.

In addition to normal items, there are two other attachment types. Links are shown with a large arrow emblem on the top left corner of the attachment icon. Tapping on a link will move ZotPad to background and open the link in Safari. Linked files are marked with a lock emblem because these can be accessed only on the computer where the linked file was added.

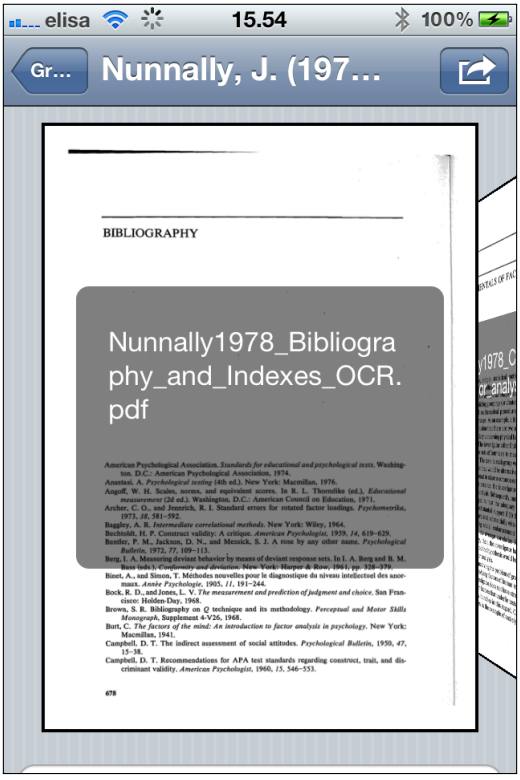


Figure 7: Item detail view

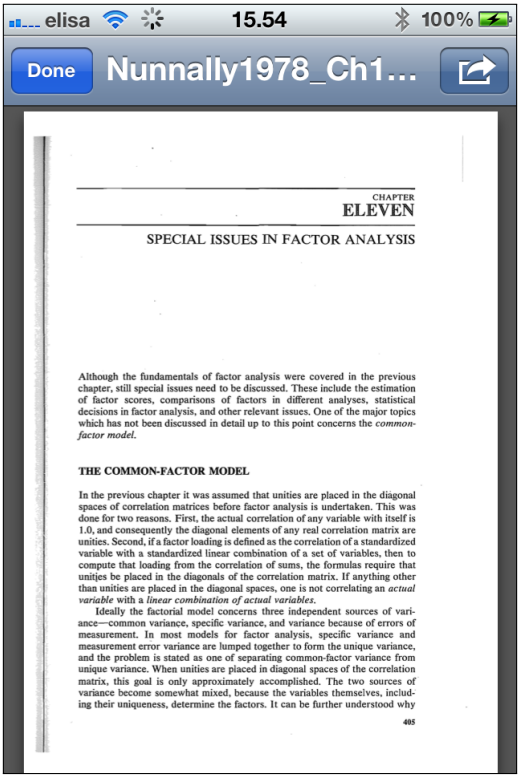


Figure 8: Reading view for attachment

### *Sending and receiving files*

Both the item detail view and reading view have an action button on the top right corner. This button can be used to perform actions on the currently chosen attachment file. The three supported actions are shown in Figure . **Purge** will delete the downloaded file that is related to the attachment. It is useful if you want to clean up files to save space on the device or if a file is corrupted and needs to be removed. Purging an files does not affect the attachment on the Zotero server, and purged files can be restored by simply downloading them again. **Open in…** will open another menu that presents a list of apps capable of receiving the file. This is shown in Figure . Tapping an app will move ZotPad to background and open the other app with the selected attachment file. The third option, **Email**, will open an email template with the citation of the currently selected file in the APA format and the currently selected attachment as attached file. After adding the recipient, and tapping **Send**, the email is moved to the outbox of Mail app, from where it will be sent.

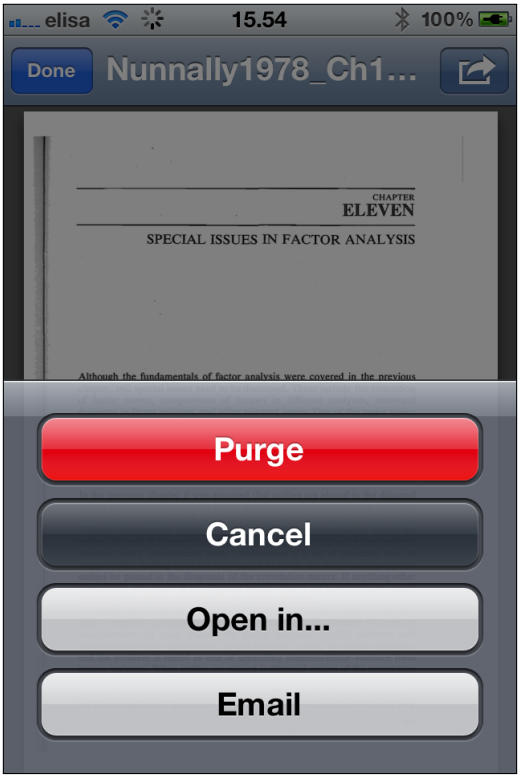


Figure 9: Opening the action menu

Figure 10: Sending a file to other app

One of the most important use cases for ZotPad is annotating PDF files on the mobile device. Because ZotPad does not currently have a feature for displaying and making PDF annotations, this must be done with the help of a third party application. Figure  shows how this is done with Adobe Reader. After annotating a PDF, the next step is to tap the action button in the Adobe Reader, choose the **Open in...** action, and choose **ZotPad** from the menu. This is shown in Figure .

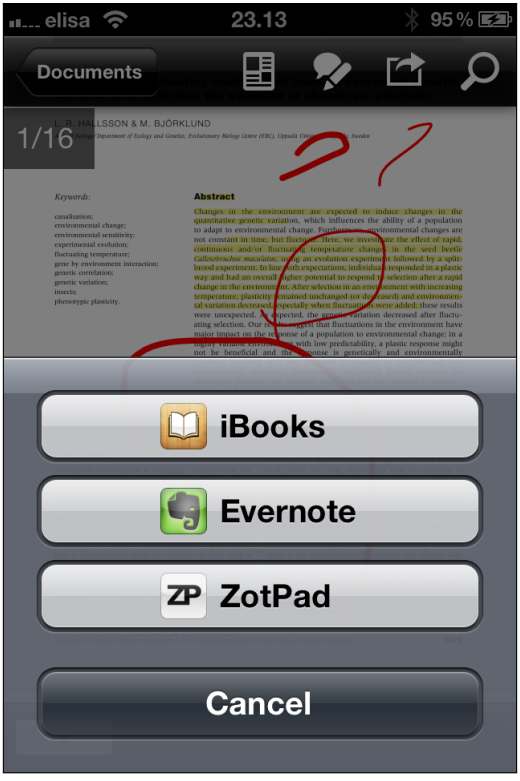


Figure 11: Sending a file back to ZotPad

Sending a file to ZotPad will cause the Adobe Reader to move to background and ZotPad to activate. If the file is not associated with an existing attachment, ZotPad will ignore the file and display an error message. If the file is recognized, it is added to upload queue and presented as an overlay shown in Figure . This view can be dismissed by tapping it. Uploading the file to Zotero server will then continue in the background. If the upload could not be completed, the view will show an error message

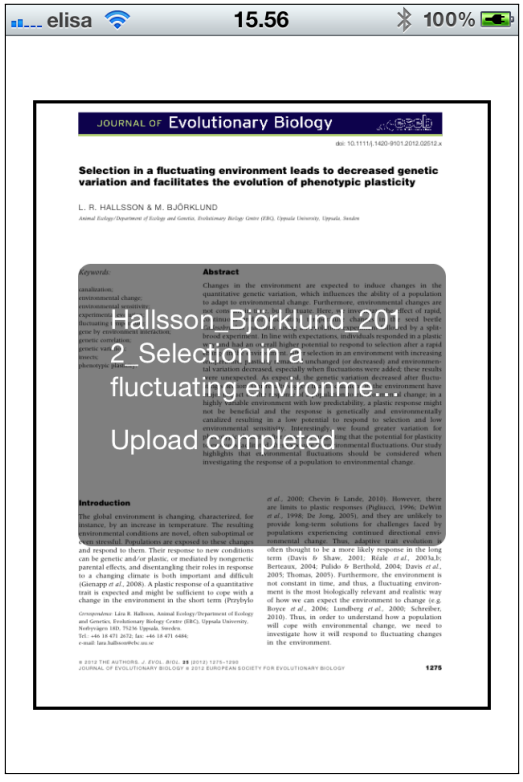


Figure 12: File import view

explaining the reason for failure, so it might be useful to dismiss it only after the file has been completely uploaded. If network connection is not available when a file is received, the file is added to the upload queue and uploaded when network connection becomes available again.

Uploading a new version of an attachment file results in conflict if a file has already been changed on the server. ZotPad has a conflict resolution screen shown in Figure . This view shows your version version of the file on the left and the server vesion on the right. If the server version is not available, it can be downloaded by tapping the attachment icon. Otherwise, tapping an attachment icon will open that version of the attachment in the QuickLook viewer.

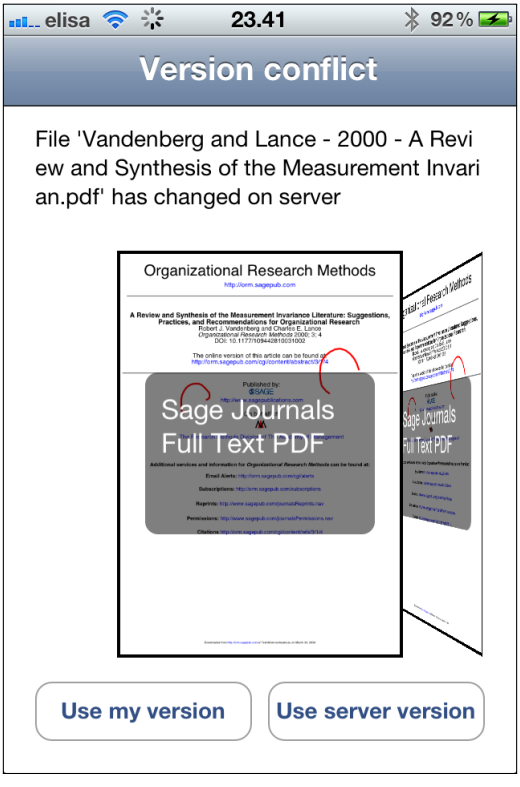


Figure 13: Conflict resolution

# *Settings*

ZotPad settings are adjusted using the iPhone Settings app. The settings screen is shown in Figure .

## *Basic settings*

This section starts with the **Username** that ZotPad is using. This is for informational purposes only and cannot be edited directly. The first user editable setting is **Mode**, which can be either **Online** or **Offline**. Offline mode prevents ZotPad from using the network connection. **Max cache size** tells how much space ZotPad is allowed to use for downloaded attachments and **Current cache size** shows an approximation of how much space is used currently. If the size of the cache exceeds the limit, ZotPad will automatically purge older files from the cache.

## *Preemptive cache*

This section contains two settings for cache. When online, ZotPad will always download the data that it needs to show a view for the user. These settings can be used to adjust how much data is downloaded preemptively in the background. The **Item data** setting controls which libraries ZotPad will cache in the background. The setting **All libraries**, will cause all libraries to be refreshed with new data from the Zotero server when ZotPad is launched. **Active libraries** will only cache the libraries that the user has viewed during the session. The **Attachment files** setting will tell Zotero when to download attachments. If this setting is **Off**, files are downloaded only when a user selects a file for downloading by tapping it. **Active items** will automatically start downloading attachments when you open an item

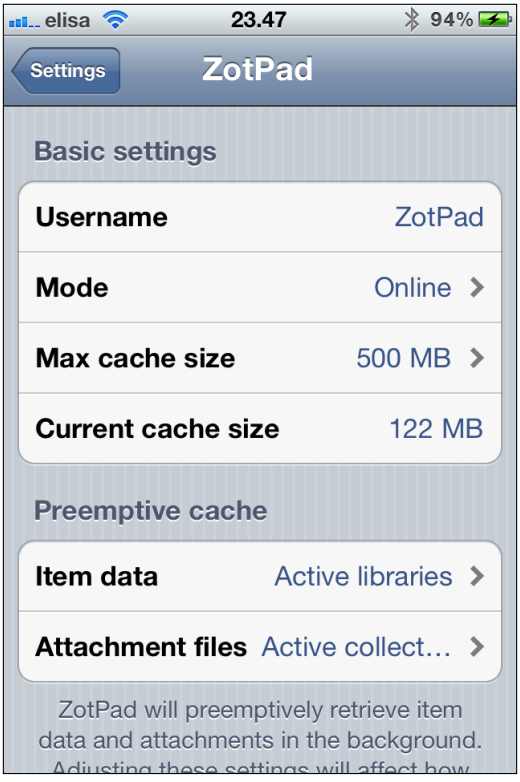


Figure 14: ZotPad settings

in item detail view. **Active collections** will start downloading all attachment files when you choose a collection and **Active libraries** does the same for libraries. **All libraries** will automatically download every existing attachment in the background.

### *File service*

The **File service** setting has three options. The default and recommended option is to use **Zotero file storage** for all libraries, and this option does not require any other configuration. The second option, **WebDAV (My Library) and Zotero file storage (Groups)**, uses WebDAV for My Library. Using this requires that user's Zotero is also configured to use the same WebDAV server and requires that the server address is specified in the settings. The server address needs to be given in the full form including the http:// or https:// prefix and the /zotero suffix. Misspecified WebDAV address will result in an error message when ZotPad is activated. Username for the WebDAV server will be asked when ZotPad attempts to connect to the WebDAV server for the first time.

The third option is **Dropbox**. Dropbox synchronization is different from the two other options in that it does not synchronize with the Zotero server, but synchronizes files directly between ZotPad and your computer. In most cases there is no user visible difference, but in some instances this can result in files not syncing correctly. Using Dropbox will also require that the your computer running Zotero is set up to synchronize the Zotero data directory with Dropbox.

The recommended way to configuring Zotero to use DropBox consists of the following steps:

1. Enable Dropbox in ZotPad settings.
2. Start ZotPad and try to download something. This will start Dropbox authentication.
3. When authentication is finished, go to your computer and verify that a folder named Apps/ZotPad has been created in your Dropbox folder.
4. Create a symbolic link from the Apps/ZotPad to your Zotero data directory using the setup scripts located in the Apps/ZotPad folder.

5. Depending on your operating system, you may need to repeat Dropbox authentication the next time you start downloading something from Dropbox

If you want to store the Zotero files in some other folder than the Apps/ZotPad, you can do this by changing **Advanced Dropbox settings**. If you choose to store the files somewhere else than the Apps/ZotPad folder, it is up to you to set up synchronization between Dropbox and Zotero storage folder.

### *Reset*

The reset section contains two settings. **Reset username** will completely reset ZotPad and forces reauthentication with the Zotero server. **Reset data** will delete all downloaded item data and attachment files. These settings take effect the next time ZotPad is started.

### *Error reports and usage statistics*

The final setting, which is on by default, sends anonymous usage statistis and error reports to ZotPad developers. This will help to identify potential problems that can be fixed in future versions.

# *Troubleshooting*

## *Log viewer and key settings*

Figure  shows the ZotPad log viewer. This view is activated by tapping the gear button in the main view. The purpose of the log viewer is to help in troubleshooting the application. For example, if files fail do download because a WebDAV server is not working correctly or cannot be reached, this will be recorded in the log.

The log contains three types of messages. Information (INFO) describe the normal workign of ZotPad. Warnings (WARN) are issued when something more important, but still normal is taking place (e.g. purging old files). Errors (ERROR) are printed out when something goes wrong (e.g. a file that you wanted to download was not found).

The log file is is reset every day and log files are stored for seven days before deleting. Old logs can be accessed with iTunes.

The toolbar contains three buttons. The first button will show this user manual. The **Email support** button will open an email template that contains information about your access key and the most recent log file.

**API key** will open a key management page in Safari. After you have logged in to zotero.org, this page can be used to adjust the permissions that the access key that ZotPad uses has. For example, you can limit the key to only one particular group library, remove write access from the key, or restrict the key so that it cannot be used to access your notes.

## *General troubleshooting procedure*

If you are experiencing problems with ZotPad, the first thing to do is to open the log viewer to see if there are any error messages. Sometimes checking the application log is sufficient to diagnose a problem. If the log

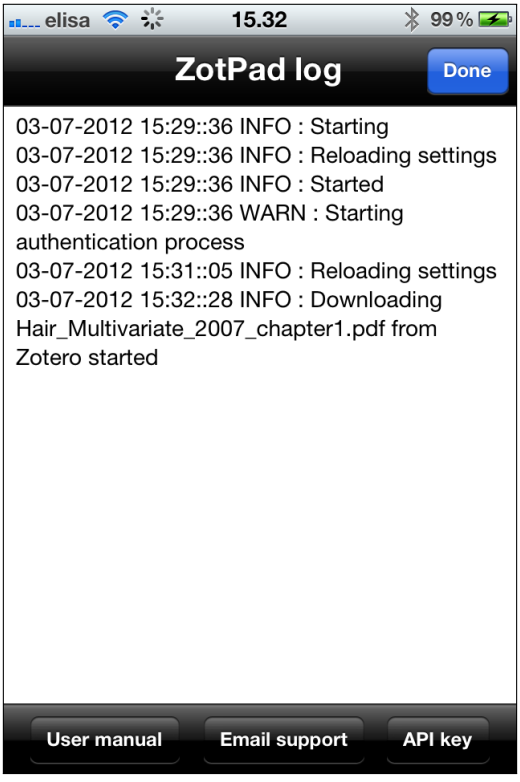


Figure 15: ZotPad log viewer

does not contain any useful, or you do not understand what the log says, the next troubleshooting step is to check the frequently asked questions section on the ZotPad website. If this does not answer the problem, you should contact support by using the email support feature.

# *Technical information*

This chapter contains technical information about ZotPad. It might not be useful for a typical user, but can contain useful or interesting details for more technically oriented users.

## *Technical architecture*

To understand how ZotPad works, you should consider it as an online viewer to your Zotero libraries, but with a cache. The way ZotPad works is somewhere between Zotero and the Zotero website. The Zotero application will synchronize its data with the server periodically and then display this data to the user. The Zotero website loads data only when needed and does this for each page view. ZotPad is similar to Zotero website in that it always loads new data when a user taps a library, a collection, or an item. ZotPad is also similar to Zotero in that it uses locally stored copy of the data that it shows the user. When a user navigates to a new library, collection, or item, this will first trigger a request against the local cache. The cache is used to present data for the user quickly while a request to the Zotero server for fresh data runs in the background. When ZotPad receives data from the Zotero server, this data are always written first in the local cache, and then the cache is queried again to refresh the user interface. Always presenting data from the cache guarantees that searching and sorting will work consistently regardless of how the source of the data. In addition to cacheing data that the user requests directly, ZotPad will also preemptively cache data that it thinks it will need in the future. The preemptive cache and the ad hoc data retrieval are optimized to avoid unnecessary requests to the Zotero server.

ZotPad stores all downloaded items in the application data directory, which can be accessed with iTunes file transfer. The attachment files are

named by appending an underscore (_) and an eight character identifier at the end of the body of the file name. Files that are edited on the device are further appended with a dash (-). Locally edited files are stored until they have been succesfully uploaded to the Zotero server

## *Development of ZotPad*

ZotPad develoment takes place at GitHub at `https://github.com/mronkko/ZotPad`. The project is open for new developers who wish to participate in making ZotPad better and earning some additional income by doing so. The source code is available under the GNU General Public Licence, version 3. This means that anyone can download the code and enhance it as long as the modified code is released under the same license. Downloading the ZotPad code and relicensing it under the App Store license is not permitted. If any developer wishes to use the ZotPad code as a part of their project, contacting the ZotPad developers first is highly recommended.

All bugs and feature request are recorded in a tracker that at GitHub: `https://github.com/mronkko/ZotPad/issues`. Feature requests can also be submitted through the forums at the ZotPad website at `http://www.zotpad.com`.

ZotPad aims to release a new version three to four times a year and does maintenance releases if critical bugs are discovered. Each major release is beta tested by actual users using the Testflight service. The beta testing is invitation only because each test deveice needs to be registered with Apple, who allows only 100 new device registrations per year. However, new testers are always welcome. If you want to participate in the next beta, please email developers@zotpad.com and ask for further information.

Beta testing the next version (1.2) is expected to start in the early fall 2012. This release will add support for notes and tags as well as support for editing item data.

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