

Reference Management with Zotero: A Comprehensive Guide for Research Lab Members

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Efficient management of references and literature is crucial. This post introduces Zotero, an open-source reference management tool that stands out for its versatility, extensibility, open-source commitments, and collaborative features. We'll explore why Zotero is our lab's preferred choice and how to set it up for optimal use within our research group.

Why Zotero?

Zotero offers several key advantages that make it ideal for our lab:

1. It's open-source, aligning with principles of accessibility and transparency in research.
2. We have access to unlimited storage through Rice University's Fondren Library.
3. A wide range of plugins allows for customization to fit various research workflows.
4. Built-in features for annotating PDFs and sharing annotations enhance collaborative research.
5. Zotero integrates seamlessly with Google Docs, Microsoft Word, and LaTeX.
6. Shared collections facilitate easy sharing of resources within our research group.

! Important

Lab Members: To access our shared resources, ask James to add you to the `dossgollin-lab` group in Zotero.

Setting Up Zotero

Essential Plugins

Zotero uses open-source plugins to extend its functionality. You can download them [here](#). The two most essential plugins for our lab are:

1. **Better BibTeX:** Provides advanced BibTeX export options, crucial for LaTeX users.
2. **Zotero Connectors:** Browser extensions that streamline saving references from web pages.

To install a plugin in Zotero, download its `.xpi` file to your computer. Then, in Zotero, click "Tools → Add-ons" and drag the `.xpi` onto the Add-ons window.

Configuring Better BibTeX

Follow these steps to ensure consistency across our lab’s citations:

1. Go to Zotero preferences, then to the Better BibTeX section.
2. Under “Citation key format”, enter: `[auth:lower]_[ShortTitle:lower]:[year]`
3. Check the box to “Force citation key to ASCII”
4. In the Export tab:
 - Enable “Export Unicode as plain-text LaTeX commands”
 - Enable “Use BibLaTeX extended name format”
 - Enable “Add JSTOR/Google Books/PubMed Central IDs to extra field”
 - In “Fields to omit”, enter: `abstract,file,annotation,local-url,rating,read,uri,keywords`

Tip

If you don’t have a Rice email yet, set up Zotero now and add your Rice email later for free unlimited storage.

Best Practices for Lab Use

There are many “right” ways to set up Zotero. By following these guidelines, we can streamline our reference management process, enhance collaboration, and maintain consistency across our lab’s publications and projects.

1. Use the configured citation key format for all references.
2. Sync your Zotero library regularly to maintain up-to-date shared collections.
3. When annotating shared PDFs, consider using a consistent color scheme or tagging system.
4. For LaTeX projects, the first author is responsible for generating the final `.bib` file from the shared Zotero collection.
5. Each collaborative document (e.g., a paper or a research proposal) should get a separate Zotero collection, and we can add relevant references to the right collection.

Useful References

1. Fondren Library tutorial on [Zotero and Citation Management](#)
2. Mushtaq Bilal’s list of 15 Zotero tutorials ([Twitter Post](#))
3. [Getting Started on Zotero: A Step-by-Step Tutorial](#) blog post