THE ZOTERO RESEARCH WORKFLOW
FOR GRADUATE STUDENTS & RESEARCHERS

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- PDF of today's presentation?
- Youtube link: https://www.youtube.com/watch?v=4f2htunzhYY

WHAT WE'LL COVER TODAY

WHY ZOTERO?

INSTALLATION & BASICS

GET RECORDS INTO ZOTERO &

ANNOTATE AS YOU READ

CITE WHILE YOU WRITE

LIMITATIONS TO THIS PRESENTATION

- I am primarily aiming this presentation at graduate students (but I hope any researcher might benefit)
- I am not a Mac user – the exact same resources exist, but there may be slight differences in layout, shortcuts, etc.
- I work predominantly in Microsoft Word, Google Docs, and R Markdown – today we'll just concentrate on the Word implementation (but Zotero works across all these and more).
- Some people use alternate software platforms – Endnote and Mendeley are popular commercial/closed-source versions.
  - Similar functionality found with these, albeit not in an open-source format. They do NOT play well together – get your frequent co-authors on the same page!
- Time – we have to move fast, but I'm happy to follow up!

WHY ZOTERO? IT ALLOWS US TO…

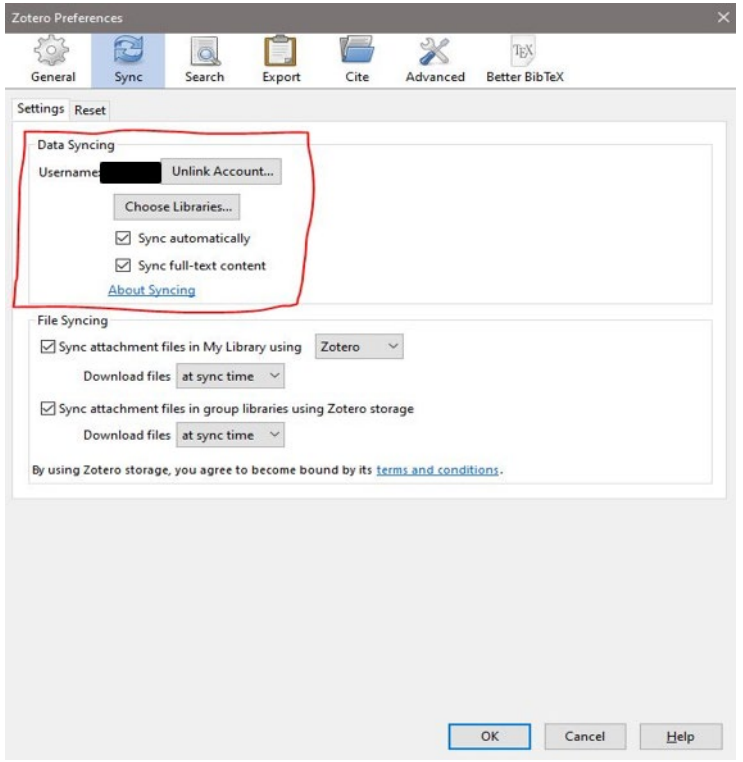
- Store and categorize as we research…
- Annotate as we read…
- Cite while we write…
- Update every citation and reference in a document to a new style (APA ←→ Chicago ←→ ASA) with a button press…
- …all while seamlessly storing our library (free up to a 300 mb limit) in the cloud!
  - Local storage is an option, but outside the scope of today

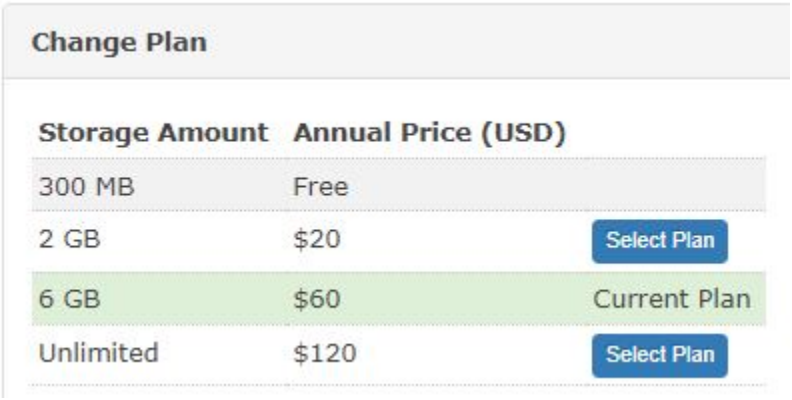
INSTALLATION SUGGESTIONS

- https://www.zotero.org/download/
  - https://www.zotero.org/support/installation
- You will want:
  - Zotero 5.0
  - Browser add-in (I use Chrome)
  - (optional but suggested) **Zotfile** add-in (next slide)
- Please pause recording and install both!

SYNC SET-UP

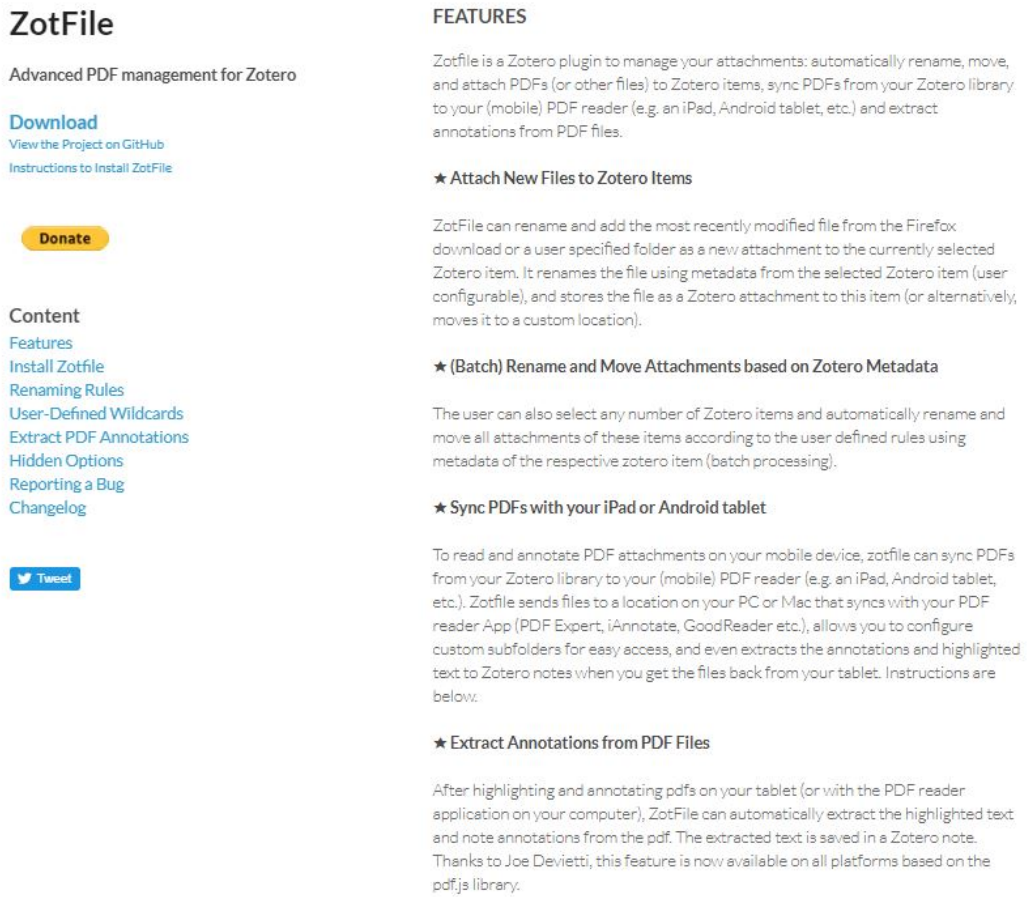
- I highly recommend setting up a **free** sync between your account and the Zotero servers.
- This allows for syncing across devices, recovery of a corrupted filed, etc.
- (Advanced) You can also set up your own sync, such as through Google Cloud. I don't do this, but there are plenty of walkthroughs if you'd like to do this.
- Cost – between free and not-free (one reason people set up their own cloud sync).





ZOTFILE – AN ADD-IN FOR ZOTERO FOR PDF MANAGEMENT

- http://zotfile.com/
- How I use it:
  - Automatically names imported files
  - Extracts annotations and notes, *with page numbers*
  - More on this a bit later



ZotFile

Advanced PDF management for Zotero

Download
View the Project on GitHub
Instructions to Install ZotFile

Donate

Content
Features
Install Zotfile
Renaming Rules
User-Defined Wildcards
Extract PDF Annotations
Hidden Options
Reporting a Bug
Changelog

Tweet

FEATURES

Zotfile is a Zotero plugin to manage your attachments: automatically rename, move, and attach PDFs (or other files) to Zotero items, sync PDFs from your Zotero library to your (mobile) PDF reader (e.g. an iPad, Android tablet, etc.) and extract annotations from PDF files.

★ Attach New Files to Zotero Items

ZotFile can rename and add the most recently modified file from the Firefox download or a user specified folder as a new attachment to the currently selected Zotero item. It renames the file using metadata from the selected Zotero item (user configurable), and stores the file as a Zotero attachment to this item (or alternatively, moves it to a custom location).

★ (Batch) Rename and Move Attachments based on Zotero Metadata

The user can also select any number of Zotero items and automatically rename and move all attachments of these items according to the user defined rules using metadata of the respective zotero item (batch processing).

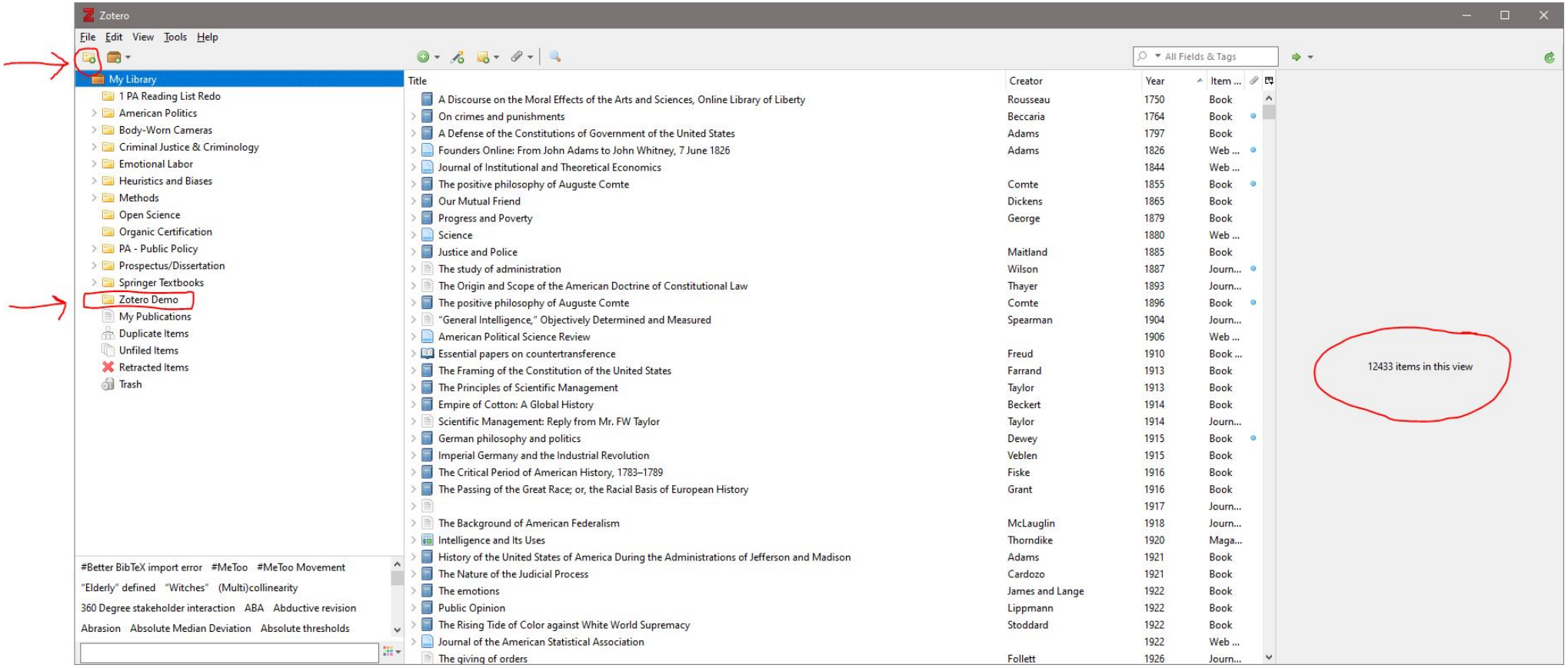
★ Sync PDFs with your iPad or Android tablet

To read and annotate PDF attachments on your mobile device, zotfile can sync PDFs from your Zotero library to your (mobile) PDF reader (e.g. an iPad, Android tablet, etc.). Zotfile sends files to a location on your PC or Mac that syncs with your PDF reader App (PDF Expert, iAnnotate, GoodReader etc.), allows you to configure custom subfolders for easy access, and even extracts the annotations and highlighted text to Zotero notes when you get the files back from your tablet. Instructions are below.

★ Extract Annotations from PDF Files

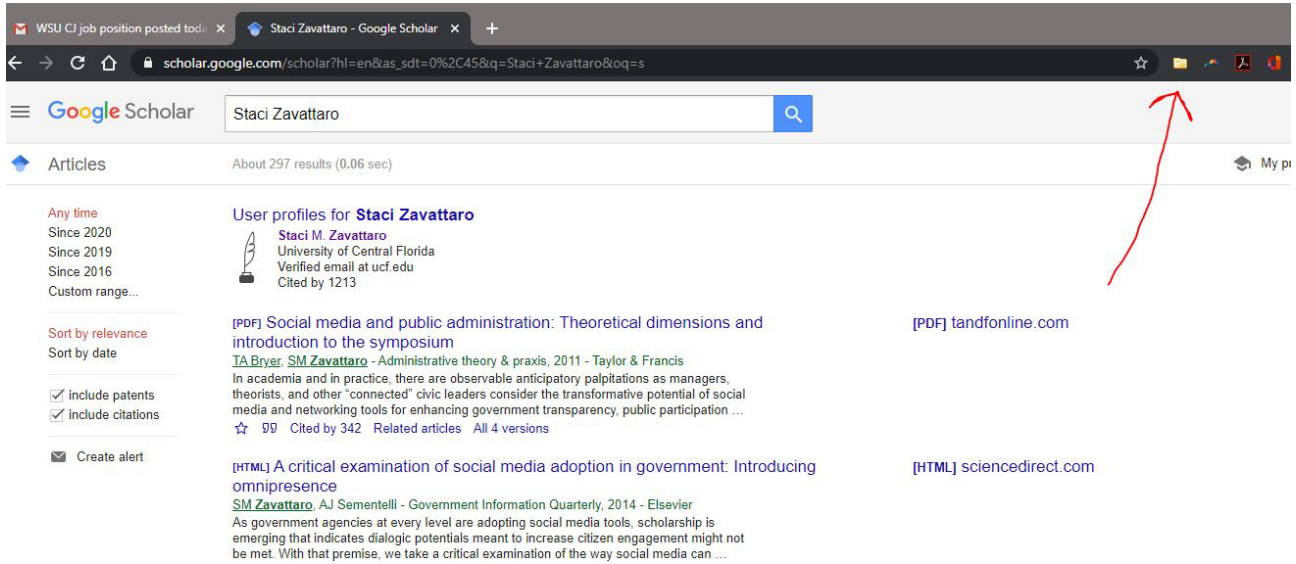
After highlighting and annotating pdfs on your tablet (or with the PDF reader application on your computer), ZotFile can automatically extract the highlighted text and note annotations from the pdf. The extracted text is saved in a Zotero note. Thanks to Joe Devietti, this feature is now available on all platforms based on the pdf.js library.

CREATING COLLECTIONS AND SUBCOLLECTIONS (DEMO)



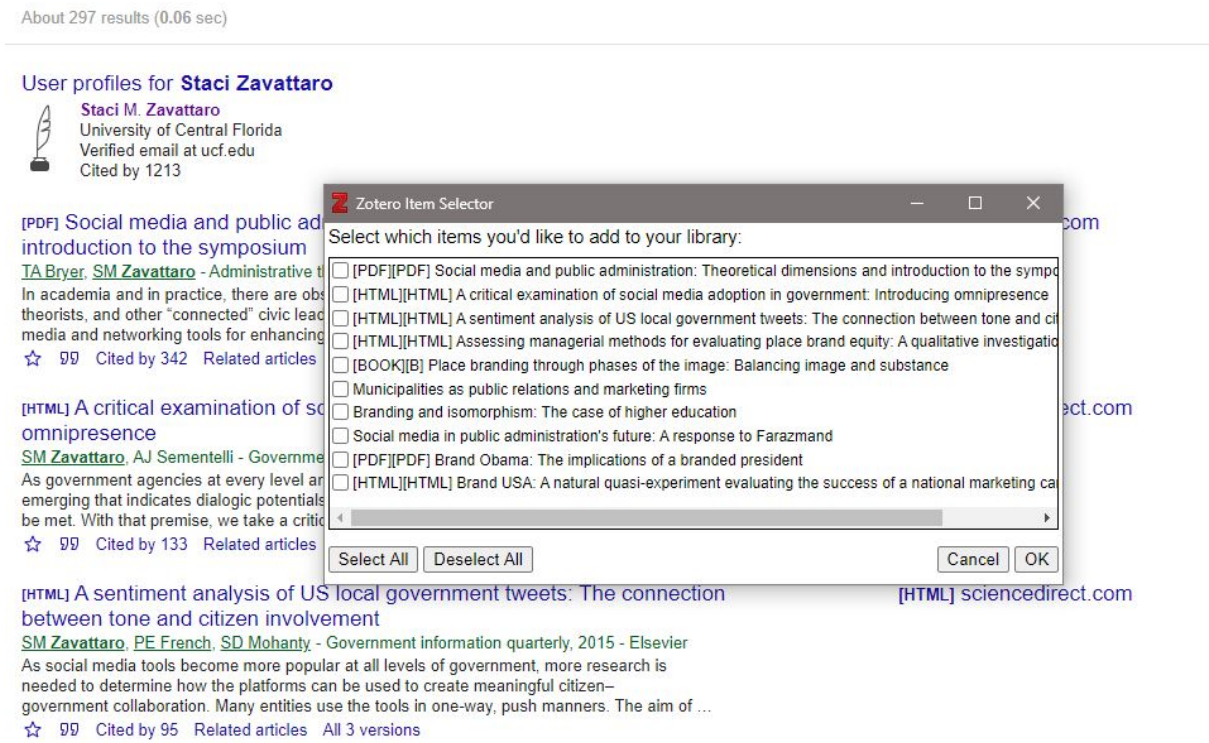
GETTING RECORDS IN – GOOGLE SCHOLAR (DEMO)

- Demo
- https://scholar.google.com/
- We can get all the articles at once (good)
- Often missing metadata and abstracts (bad)



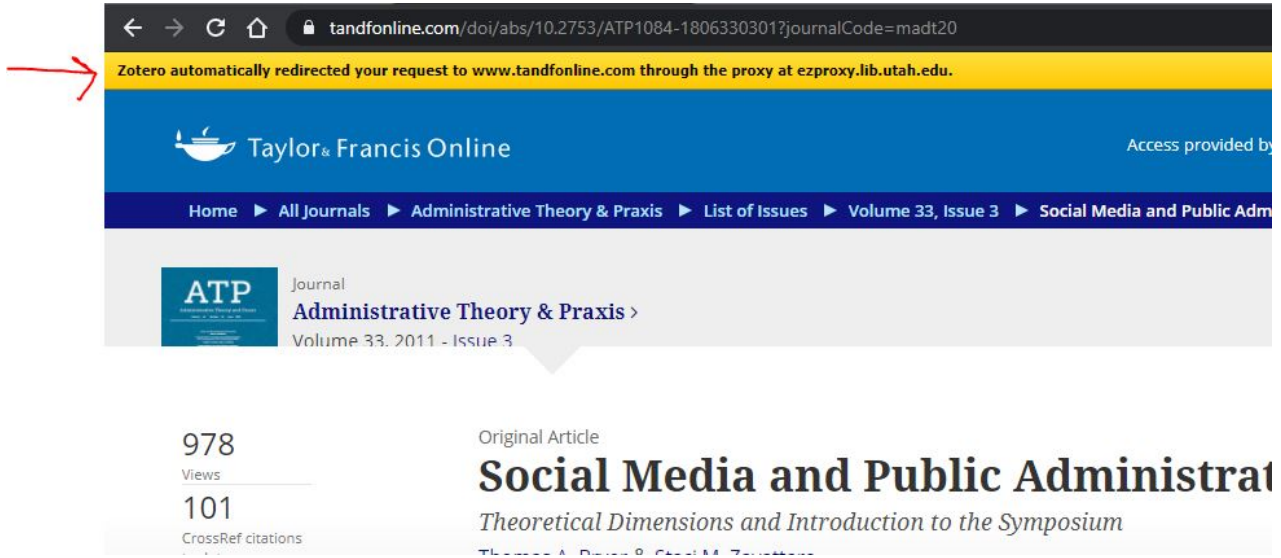
GETTING RECORDS IN – GOOGLE SCHOLAR (DEMO)

- You can select individual records to import
- Or select them all!
- When possible, Zotero will import the full text
  - This depends on what library access your university has
- Downsides to the mass import
  - No automatic abstract
  - No automatic DOI



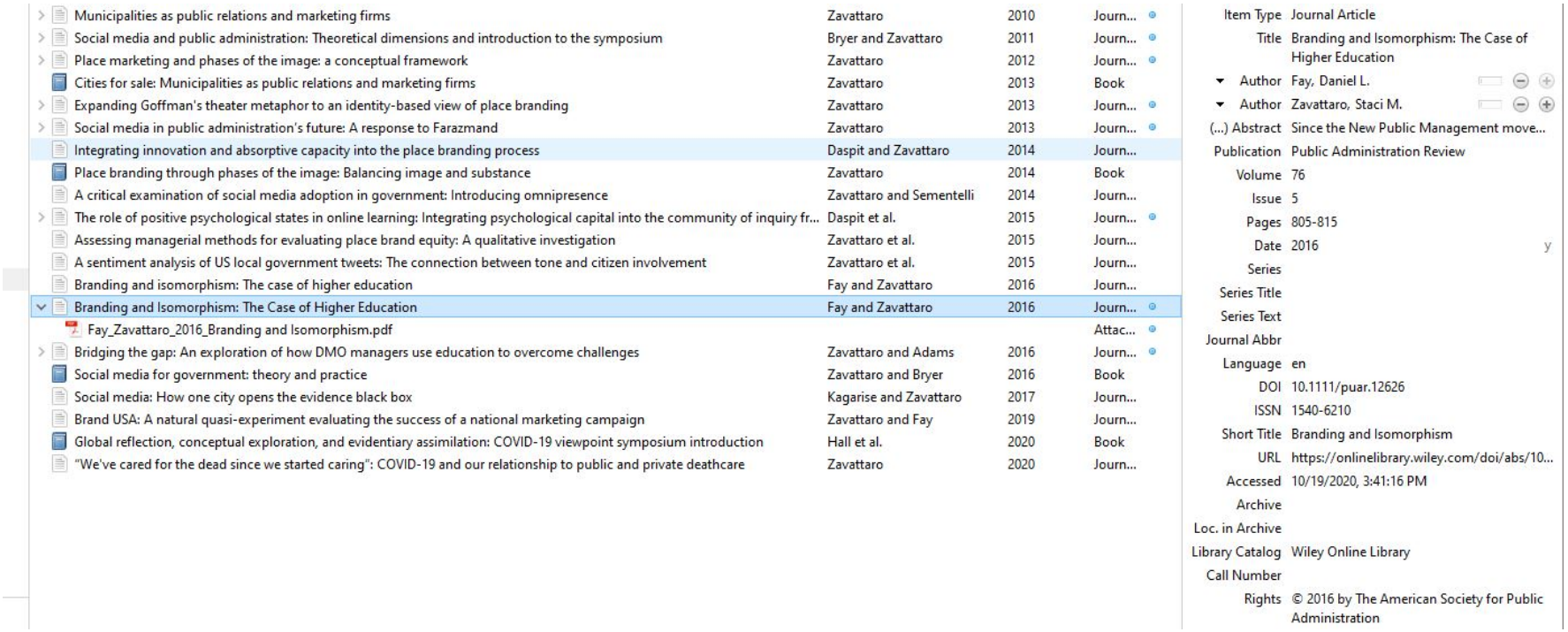
GETTING RECORDS IN – JOURNAL PAGE (DEMO)

- If you are logged into your University account, Zotero will proxy your request
- Use the same Zotero import button as before



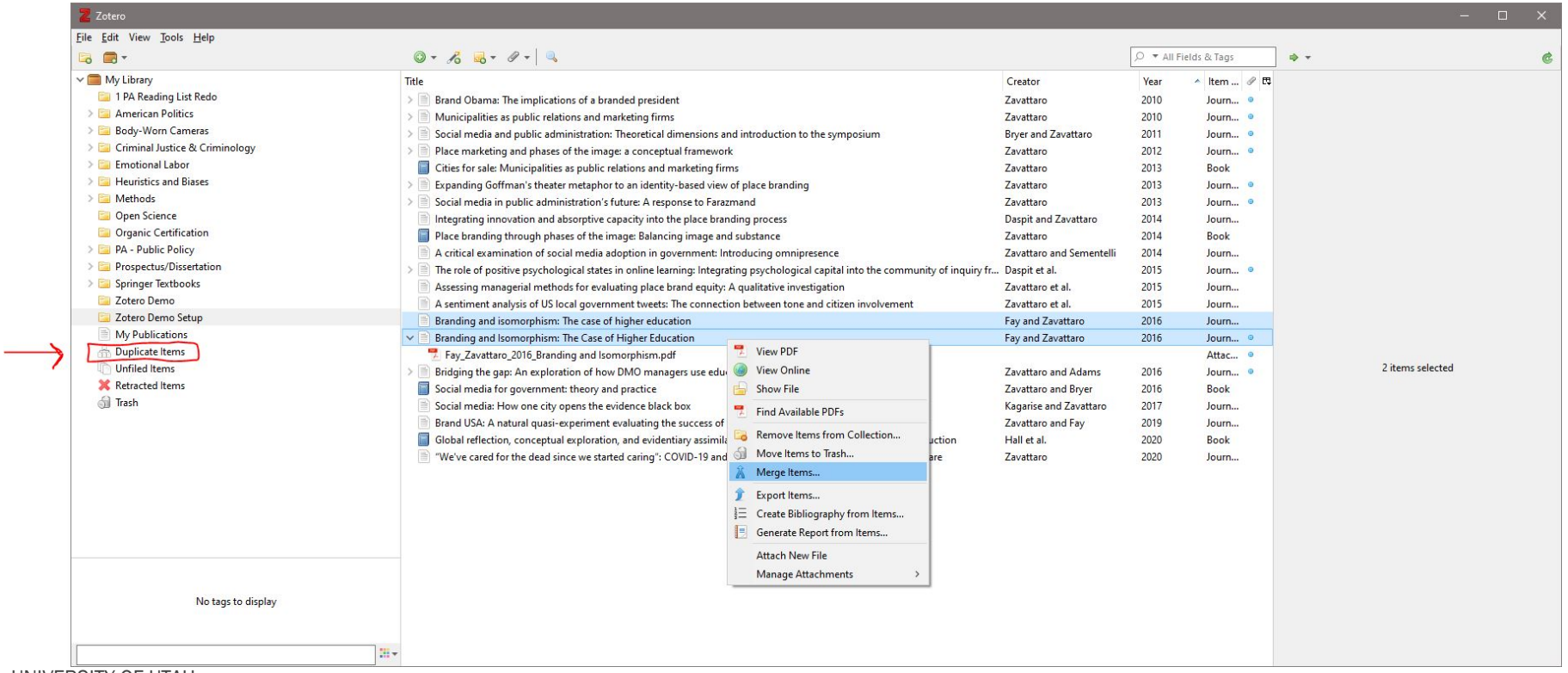
GETTING RECORDS IN – JOURNAL PAGE (DEMO)

- Fixed – got the DOI and the abstract right from the journal page, and the full PDF!
- But now we have duplicate records!



DUPLICATE RECORDS BEGONE (DEMO)

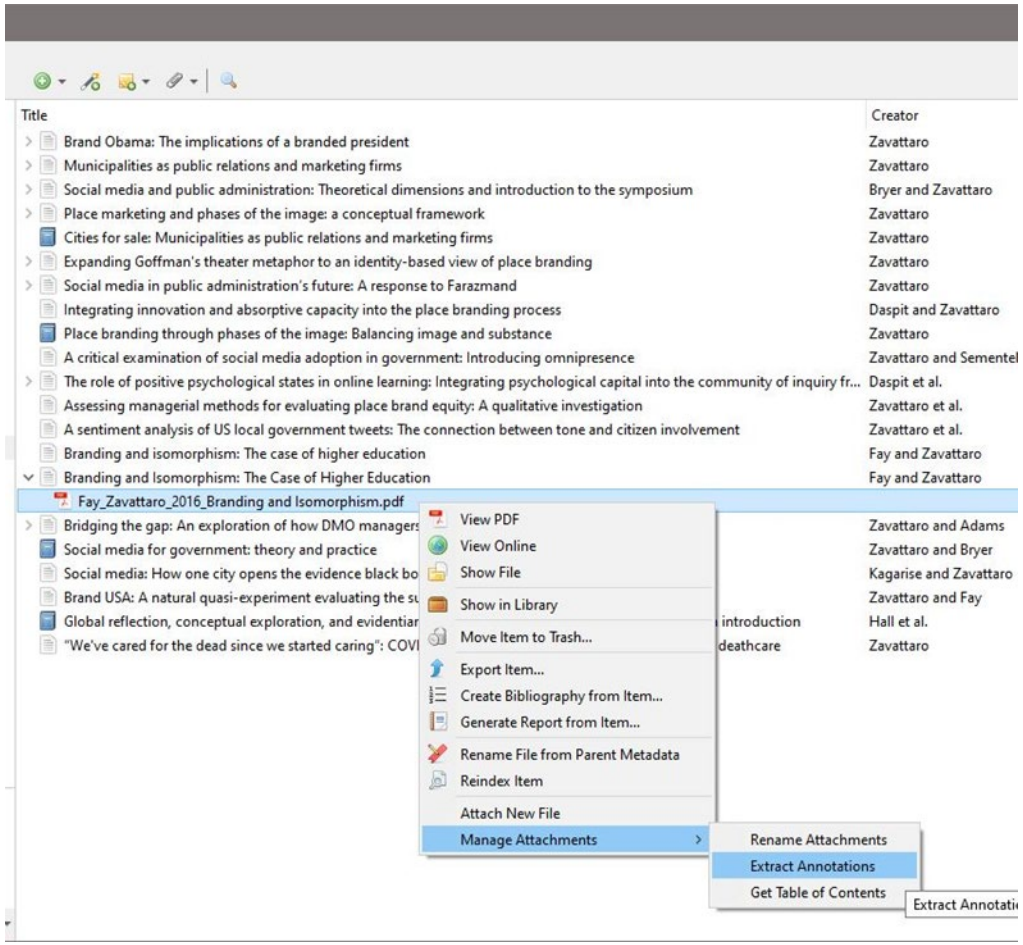
- Either directly from the library (shift/cntrl click to select multiples)
- Or from the “Duplicate Items” section of your library!

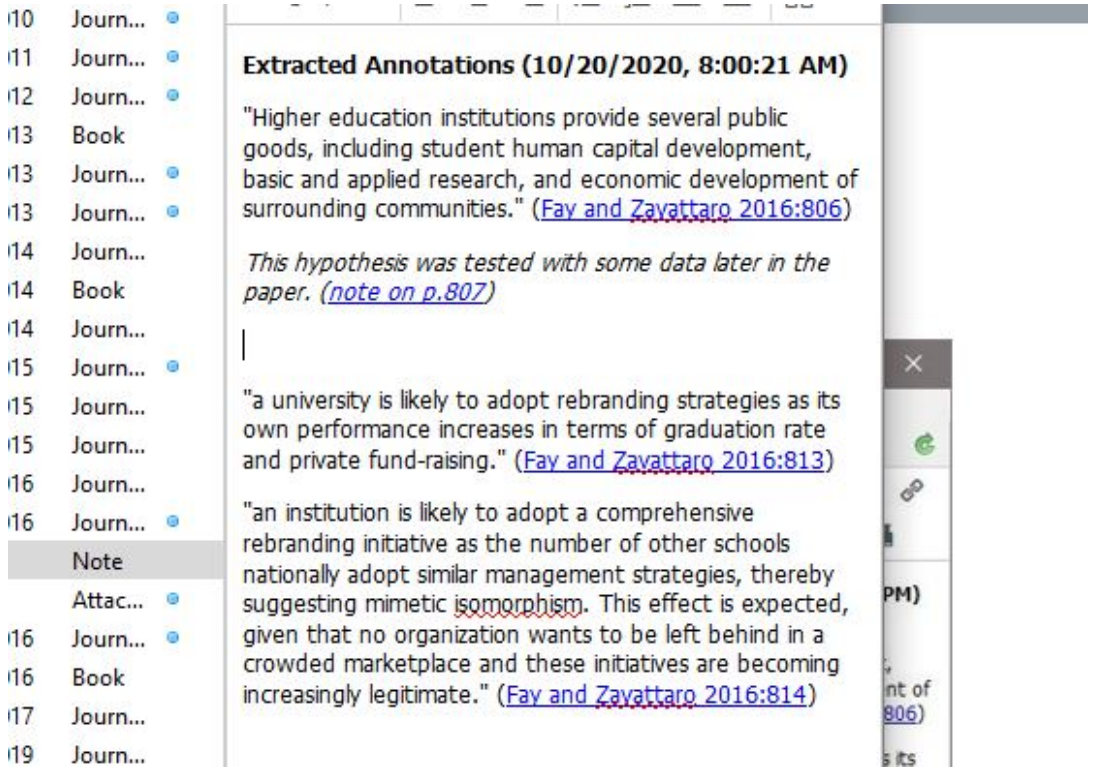


ANNOTATING A PDF - DEMO

- Demo
- Find record in Zotero
- Double-click PDF
- Annotate as needed!
- Save and close
- Extract from right-click (on stored PDF)

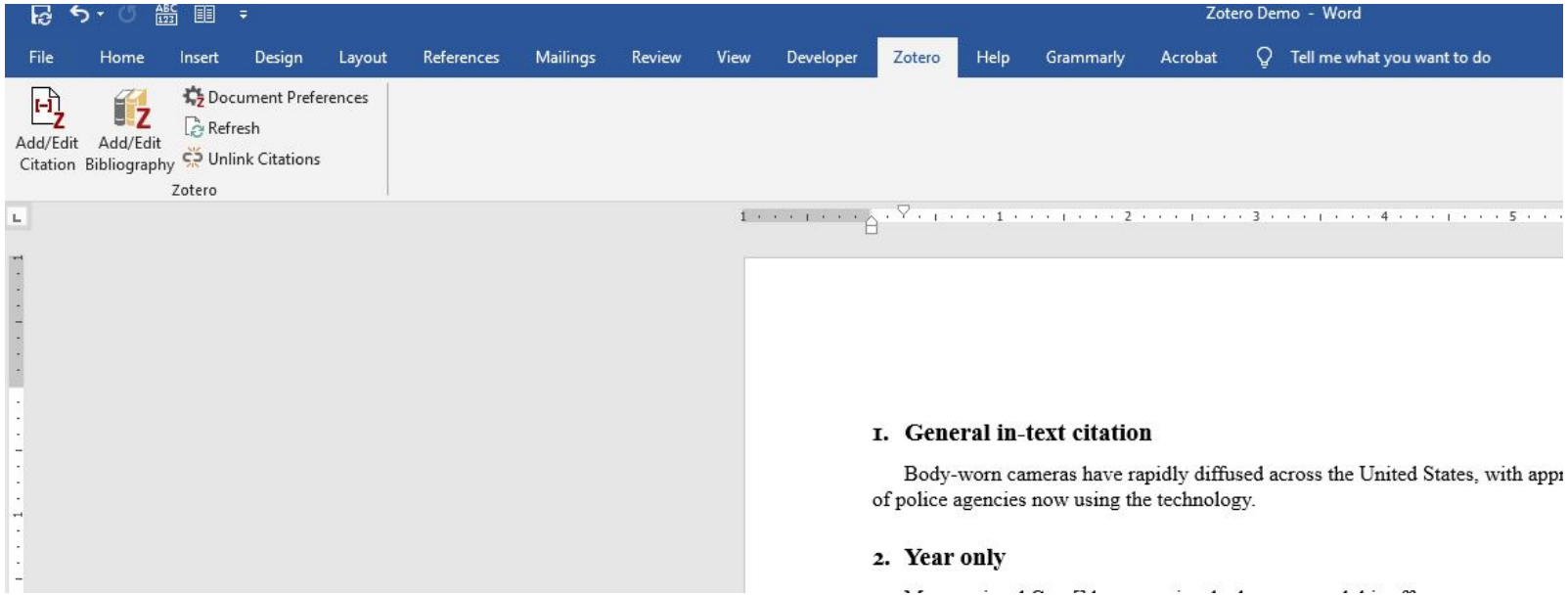
EXTRACTED ANNOTATIONS - DEMO





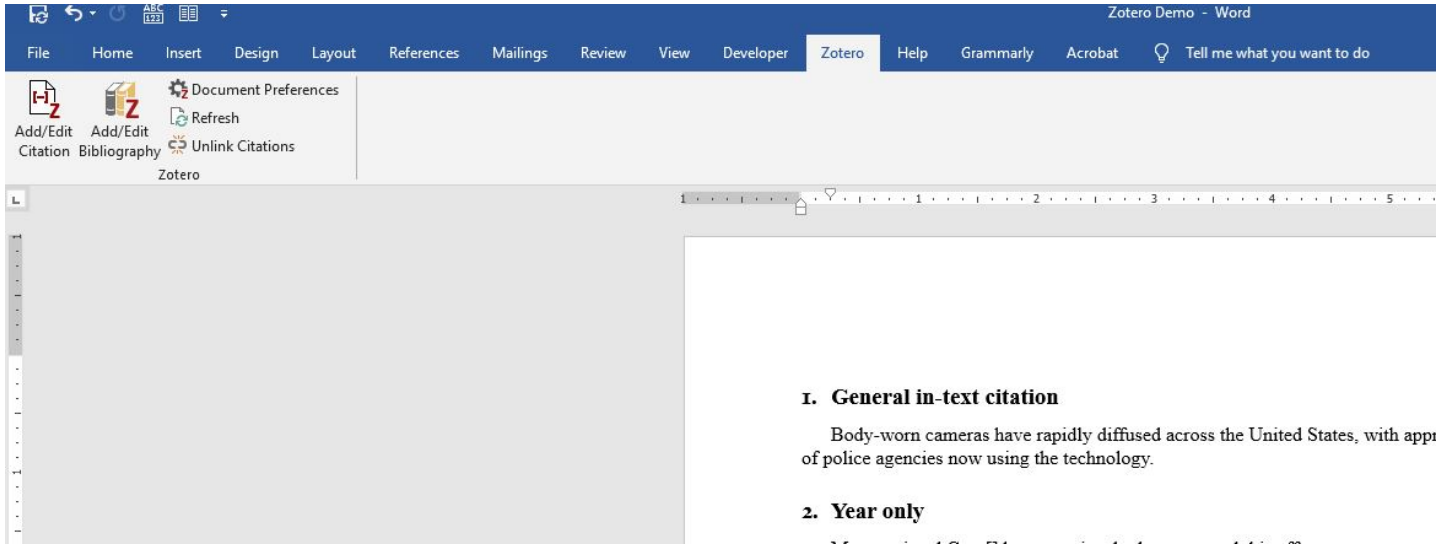
CITE AS YOU WRITE (DEMO)

- This is where it all pays off!



CITE AS YOU WRITE (DEMO)

- This is where it all pays off!
- General in-text cite
- Year only
- Direct quote
- Easy reference list (and changing)



WORKING WITH CO-AUTHORS?

- Best practice – get everyone on the same platform!
- BUT – we have successfully worked papers with a combination of Zotero-Mendeley-None. Just make sure there is one author in charge of citations.

WHAT WE COVERED!

WHY ZOTERO?

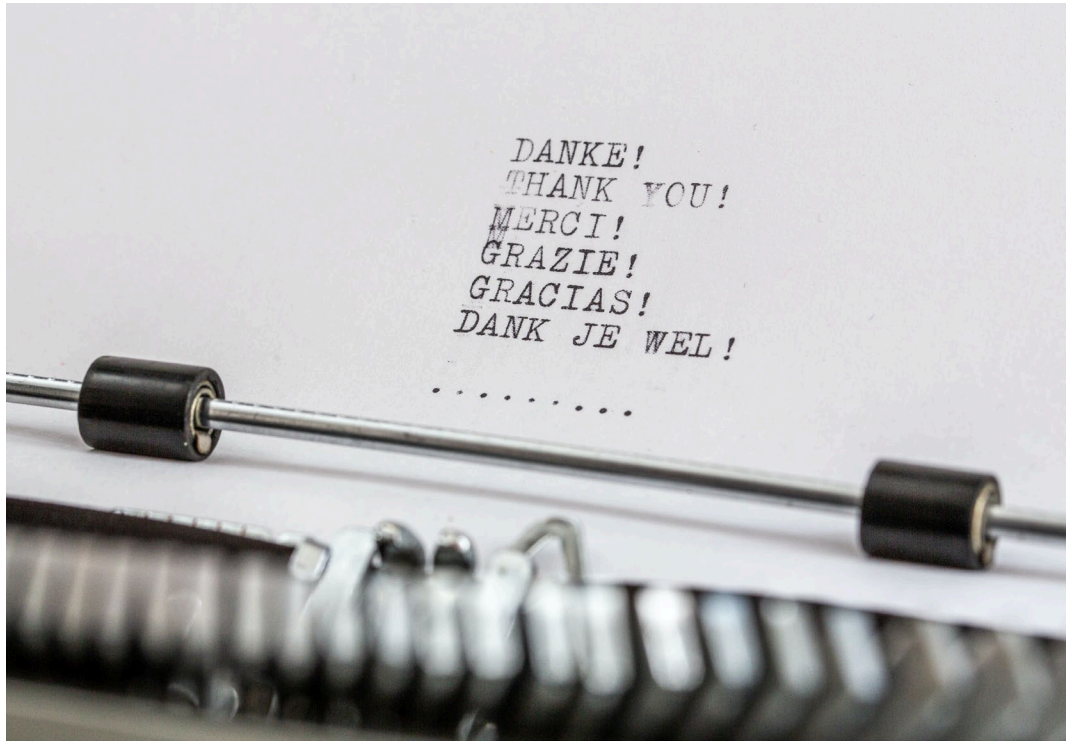
EASY COLLECTION OF RESEARCH MATERIALS

GET RECORDS INTO ZOTERO &

ANNOTATE AS YOU READ

CITE WHILE YOU WRITE WITHOUT INTERUPPTION

THANK YOU!



- Questions or Follow-ups?
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