

# THE ZOTERO RESEARCH WORKFLOW FOR GRADUATE STUDENTS & RESEARCHERS

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- [www.ianadamsresearch.com](http://www.ianadamsresearch.com)
- [PDF of today's presentation?](#)
- Youtube link: <https://www.youtube.com/watch?v=4f2htunzhYY>



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## 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

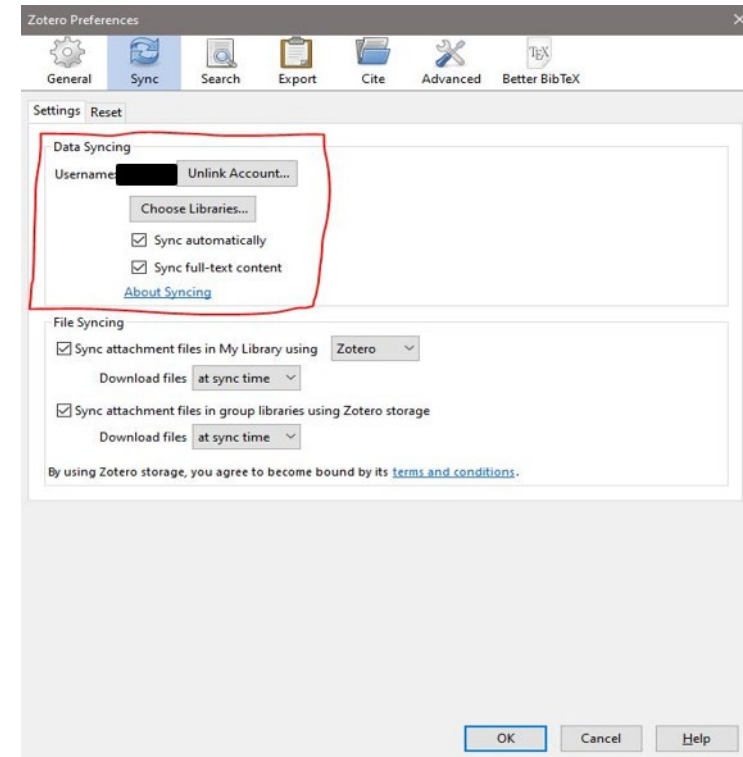
# INSTALLATION SUGGESTIONS

- <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 file, 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).



## Change Plan

Storage Amount	Annual Price (USD)	
300 MB	Free	
2 GB	\$20	Select Plan
6 GB	\$60	Current Plan
Unlimited	\$120	Select Plan

# 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)

The screenshot shows the Zotero application window. On the left, the 'My Library' pane lists various collections. The 'Zotero Demo' collection is highlighted with a red box and a red arrow. Below it, the 'My Publications' collection is also highlighted with a red box and a red arrow. The main pane displays a list of items, including titles, creators, years, and item types. A red circle on the right side of the main pane highlights the text '12433 items in this view'.

Title	Creator	Year	Item ...
A Discourse on the Moral Effects of the Arts and Sciences, Online Library of Liberty	Rousseau	1750	Book
On crimes and punishments	Beccaria	1764	Book
A Defense of the Constitutions of Government of the United States	Adams	1797	Book
Founders Online: From John Adams to John Whitney, 7 June 1826	Adams	1826	Web ...
Journal of Institutional and Theoretical Economics		1844	Web ...
The positive philosophy of Auguste Comte	Comte	1855	Book
Our Mutual Friend	Dickens	1865	Book
Progress and Poverty	George	1879	Book
Science		1880	Web ...
Justice and Police	Maitland	1885	Book
The study of administration	Wilson	1887	Journ...
The Origin and Scope of the American Doctrine of Constitutional Law	Thayer	1893	Journ...
The positive philosophy of Auguste Comte	Comte	1896	Book
"General Intelligence," Objectively Determined and Measured	Spearman	1904	Journ...
American Political Science Review		1906	Web ...
Essential papers on countertransference	Freud	1910	Book ...
The Framing of the Constitution of the United States	Farrand	1913	Book
The Principles of Scientific Management	Taylor	1913	Book
Empire of Cotton: A Global History	Beckert	1914	Book
Scientific Management: Reply from Mr. FW Taylor	Taylor	1914	Journ...
German philosophy and politics	Dewey	1915	Book
Imperial Germany and the Industrial Revolution	Veblen	1915	Book
The Critical Period of American History, 1783-1789	Fiske	1916	Book
The Passing of the Great Race; or, the Racial Basis of European History	Grant	1916	Book
		1917	Journ...
The Background of American Federalism	McLaughlin	1918	Journ...
Intelligence and Its Uses	Thorndike	1920	Maga...
History of the United States of America During the Administrations of Jefferson and Madison	Adams	1921	Book
The Nature of the Judicial Process	Cardozo	1921	Book
The emotions	James and Lange	1922	Book
Public Opinion	Lippmann	1922	Book
The Rising Tide of Color against White World Supremacy	Stoddard	1922	Book
Journal of the American Statistical Association		1922	Web ...
The giving of orders	Follett	1926	Journ...



# GETTING RECORDS IN – GOOGLE SCHOLAR (DEMO)



Staci Zavattaro

☐ Articles ☐ Case law

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

WSU CJ job position posted tod... x Staci Zavattaro - Google Scholar x +

scholar.google.com/scholar?hl=en&as\_sdt=0%2C45&q=Staci+Zavattaro&oq=s

Google Scholar Staci Zavattaro

Articles About 297 results (0.06 sec)

Any time  
Since 2020  
Since 2019  
Since 2016  
Custom range...

Sort by relevance  
Sort by date

☒ include patents  
☒ include citations

☐ Create alert

User profiles for Staci Zavattaro

Staci M. Zavattaro  
University of Central Florida  
Verified email at ucf.edu  
Cited by 1213

[PDF] Social media and public administration: Theoretical dimensions and introduction to the symposium  
TA Bryer, SM Zavattaro - Administrative theory & praxis, 2011 - Taylor & Francis  
In academia and in practice, there are observable anticipatory palpitations as managers, theorists, and other "connected" civic leaders consider the transformative potential of social media and networking tools for enhancing government transparency, public participation ...  
☆ 00 Cited by 342 Related articles All 4 versions

[HTML] A critical examination of social media adoption in government: Introducing omnipresence  
SM Zavattaro, AJ Sementelli - Government Information Quarterly, 2014 - Elsevier  
As government agencies at every level are adopting social media tools, scholarship is emerging that indicates dialogic potentials meant to increase citizen engagement might not be met. With that premise, we take a critical examination of the way social media can ...

[PDF] tandfonline.com


[HTML] sciencedirect.com

# 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

About 297 results (0.06 sec)

## User profiles for **Staci Zavattaro**

 **Staci M. Zavattaro**  
University of Central Florida  
Verified email at ucf.edu  
Cited by 1213

[PDF] Social media and public administration: Theoretical dimensions and introduction to the symposium

[TA Bryer](#), [SM Zavattaro](#) - Administrative Science Quarterly, 2015  
In academia and in practice, there are observations of social media use by public leaders, theorists, and other "connected" civic leaders. This article examines the use of social media and networking tools for enhancing public administration research and practice.

☆ 99 Cited by 342 Related articles

[HTML] A critical examination of social media adoption in government: Introducing omnipresence

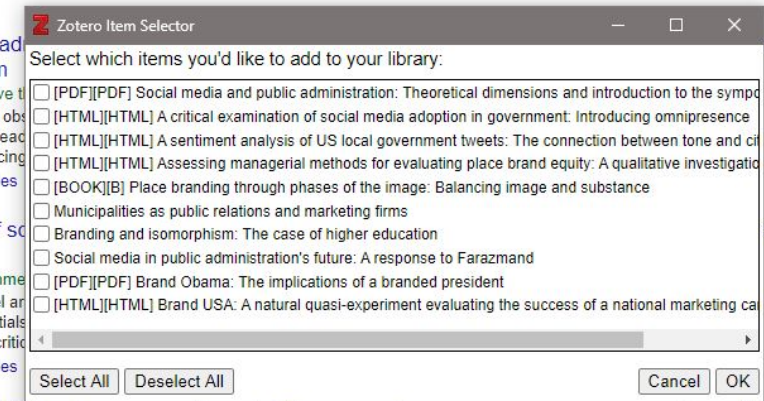
[SM Zavattaro](#), [AJ Sementelli](#) - Government Information Quarterly, 2015  
As government agencies at every level are embracing social media, more research is needed to determine how the platforms can be used to create meaningful citizen-government collaboration. Many entities use the tools in one-way, push manners. The aim of this article is to provide a critical examination of social media adoption in government.

☆ 99 Cited by 133 Related articles

[HTML] A sentiment analysis of US local government tweets: The connection between tone and citizen involvement

[SM Zavattaro](#), [PE French](#), [SD Mohanty](#) - Government Information Quarterly, 2015 - Elsevier  
As social media tools become more popular at all levels of government, more research is needed to determine how the platforms can be used to create meaningful citizen-government collaboration. Many entities use the tools in one-way, push manners. The aim of this article is to provide a critical examination of social media adoption in government.

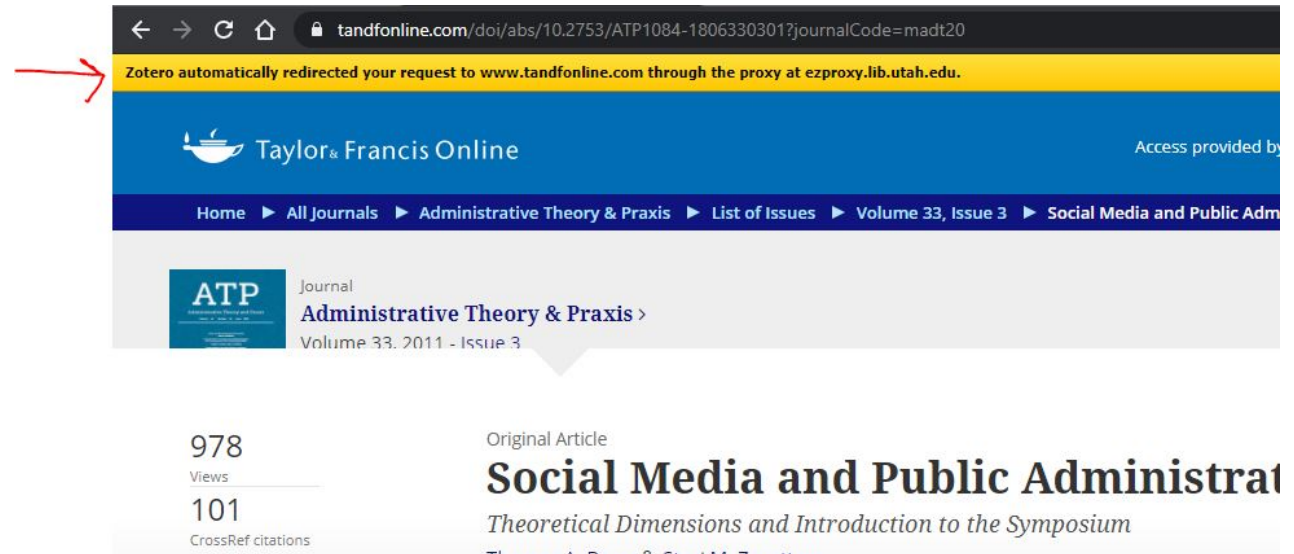
☆ 99 Cited by 95 Related articles All 3 versions



[HTML] sciencedirect.com

## 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



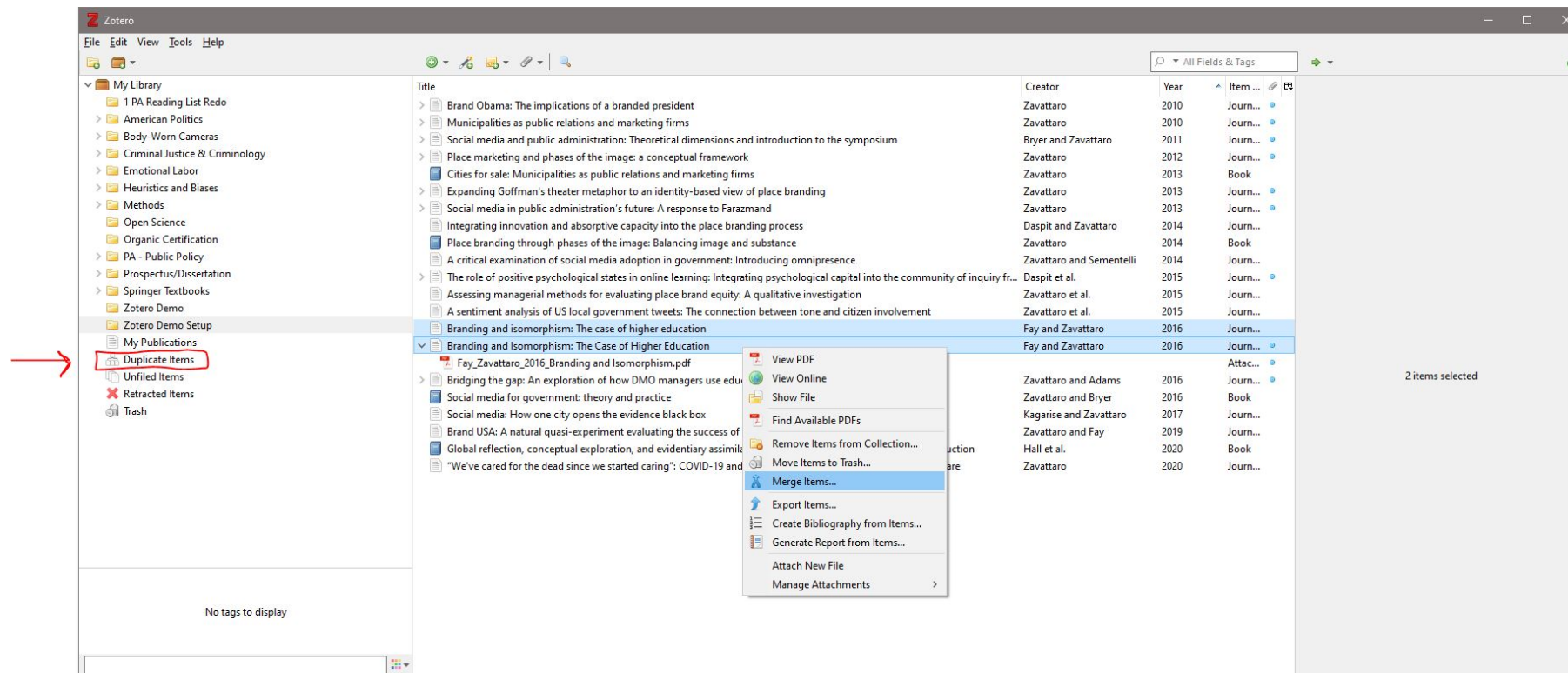
# GETTING RECORDS IN – JOURNAL PAGE (DEMO)

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

Item Type	Title	Author	Year	Item Type	Title	Author	Year	Item Type	Title	Author	Year
Municipalities as public relations and marketing firms	Zavattaro	2010	Journ...	Item Type	Journal Article			Item Type	Journal Article		
Social media and public administration: Theoretical dimensions and introduction to the symposium	Bryer and Zavattaro	2011	Journ...	Title	Branding and Isomorphism: The Case of Higher Education			Title	Branding and Isomorphism: The Case of Higher Education		
Place marketing and phases of the image: a conceptual framework	Zavattaro	2012	Journ...	Author	Fay, Daniel L.			Author	Fay, Daniel L.		
Cities for sale: Municipalities as public relations and marketing firms	Zavattaro	2013	Book	Author	Zavattaro, Staci M.			Author	Zavattaro, Staci M.		
Expanding Goffman's theater metaphor to an identity-based view of place branding	Zavattaro	2013	Journ...	(...) Abstract	Since the New Public Management move...			(...) Abstract	Since the New Public Management move...		
Social media in public administration's future: A response to Farazmand	Zavattaro	2013	Journ...	Publication	Public Administration Review			Publication	Public Administration Review		
Integrating innovation and absorptive capacity into the place branding process	Daspit and Zavattaro	2014	Journ...	Volume	76			Volume	76		
Place branding through phases of the image: Balancing image and substance	Zavattaro	2014	Book	Issue	5			Issue	5		
A critical examination of social media adoption in government: Introducing omnipresence	Zavattaro and Sementelli	2014	Journ...	Pages	805-815			Pages	805-815		
The role of positive psychological states in online learning: Integrating psychological capital into the community of inquiry fr...	Daspit et al.	2015	Journ...	Date	2016			Date	2016		
Assessing managerial methods for evaluating place brand equity: A qualitative investigation	Zavattaro et al.	2015	Journ...	Series				Series			
A sentiment analysis of US local government tweets: The connection between tone and citizen involvement	Zavattaro et al.	2015	Journ...	Series Title				Series Title			
Branding and isomorphism: The case of higher education	Fay and Zavattaro	2016	Journ...	Series Text				Series Text			
Branding and Isomorphism: The Case of Higher Education	Fay and Zavattaro	2016	Journ...	Journal Abbr				Journal Abbr			
Fay_Zavattaro_2016_Branding and Isomorphism.pdf			Attac...	Language	en			Language	en		
Bridging the gap: An exploration of how DMO managers use education to overcome challenges	Zavattaro and Adams	2016	Journ...	DOI	10.1111/puar.12626			DOI	10.1111/puar.12626		
Social media for government: theory and practice	Zavattaro and Bryer	2016	Book	ISSN	1540-6210			ISSN	1540-6210		
Social media: How one city opens the evidence black box	Kagarise and Zavattaro	2017	Journ...	Short Title	Branding and Isomorphism			Short Title	Branding and Isomorphism		
Brand USA: A natural quasi-experiment evaluating the success of a national marketing campaign	Zavattaro and Fay	2019	Journ...	URL	https://onlinelibrary.wiley.com/doi/abs/10...			URL	https://onlinelibrary.wiley.com/doi/abs/10...		
Global reflection, conceptual exploration, and evidentiary assimilation: COVID-19 viewpoint symposium introduction	Hall et al.	2020	Book	Accessed	10/19/2020, 3:41:16 PM			Accessed	10/19/2020, 3:41:16 PM		
"We've cared for the dead since we started caring": COVID-19 and our relationship to public and private deathcare	Zavattaro	2020	Journ...	Archive				Archive			
				Loc. in Archive				Loc. in Archive			
				Library Catalog	Wiley Online Library			Library Catalog	Wiley Online Library		
				Call Number				Call Number			
				Rights	© 2016 by The American Society for Public Administration			Rights	© 2016 by The American Society for Public Administration		

# DUPLICATE RECORDS BEGONE (DEMO)

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

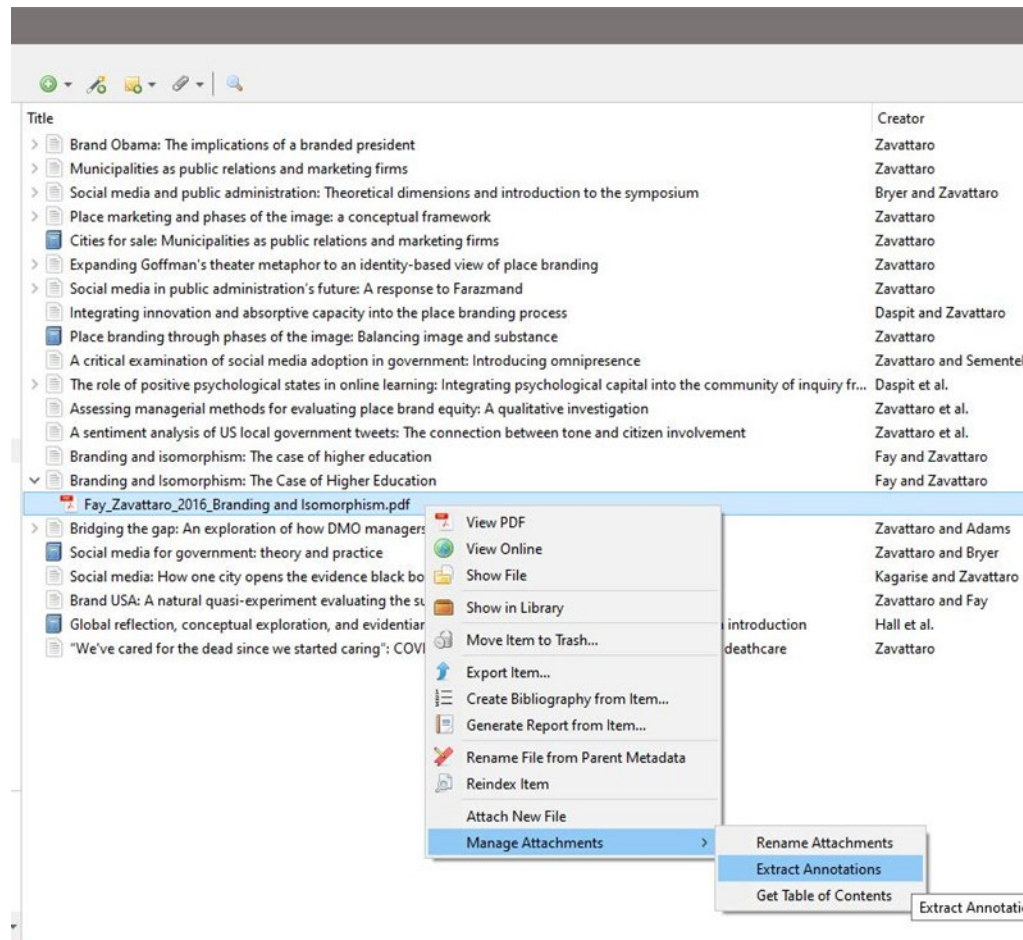


# ANNOTATING A PDF - DEMO

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



# EXTRACTED ANNOTATIONS - DEMO



10	Journ...	
11	Journ...	
12	Journ...	
13	Book	
13	Journ...	
13	Journ...	
14	Journ...	
14	Book	
14	Journ...	
15	Journ...	
15	Journ...	
15	Journ...	
16	Journ...	
16	Journ...	
	Note	
	Attac...	
16	Journ...	
16	Book	
17	Journ...	
19	Journ...	

## Extracted Annotations (10/20/2020, 8:00:21 AM)

"Higher education institutions provide several public goods, including student human capital development, basic and applied research, and economic development of surrounding communities." ([Fay and Zavattaro 2016:806](#))

*This hypothesis was tested with some data later in the paper. ([note on p.807](#))*

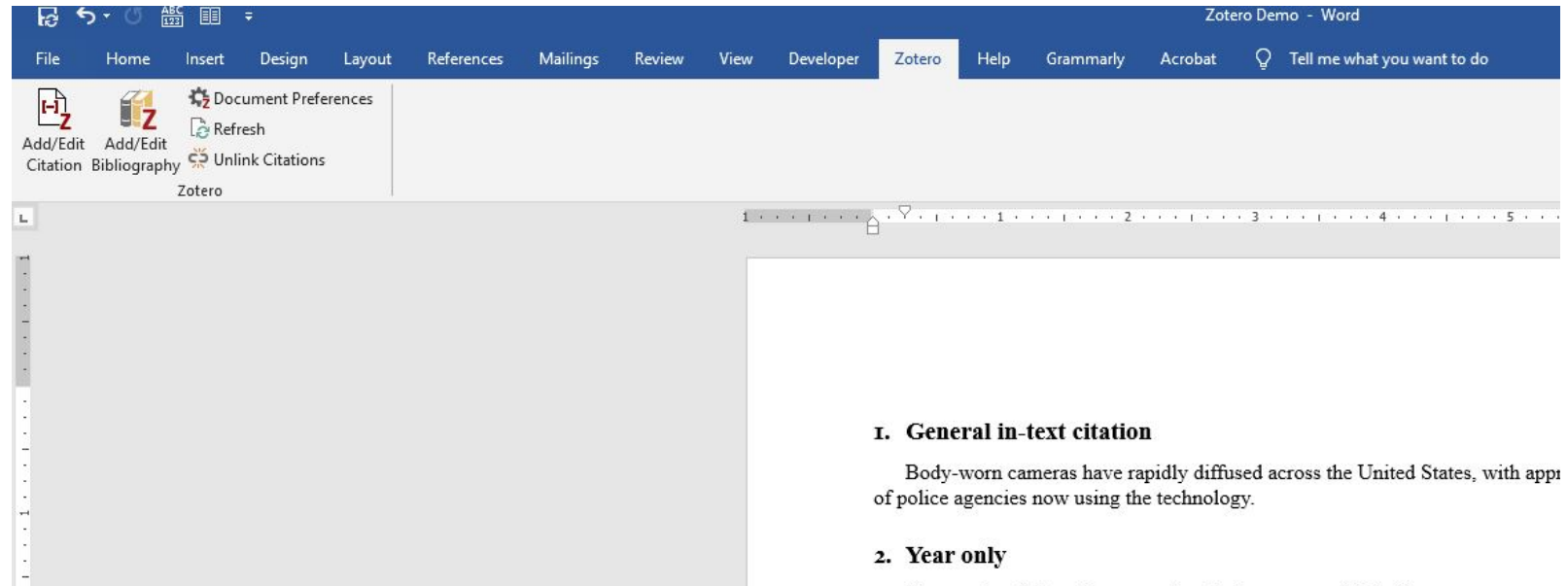
"a university is likely to adopt rebranding strategies as its own performance increases in terms of graduation rate and private fund-raising." ([Fay and Zavattaro 2016:813](#))

"an institution is likely to adopt a comprehensive rebranding initiative as the number of other schools nationally adopt similar management strategies, thereby suggesting mimetic isomorphism. This effect is expected, given that no organization wants to be left behind in a crowded marketplace and these initiatives are becoming increasingly legitimate." ([Fay and Zavattaro 2016:814](#))



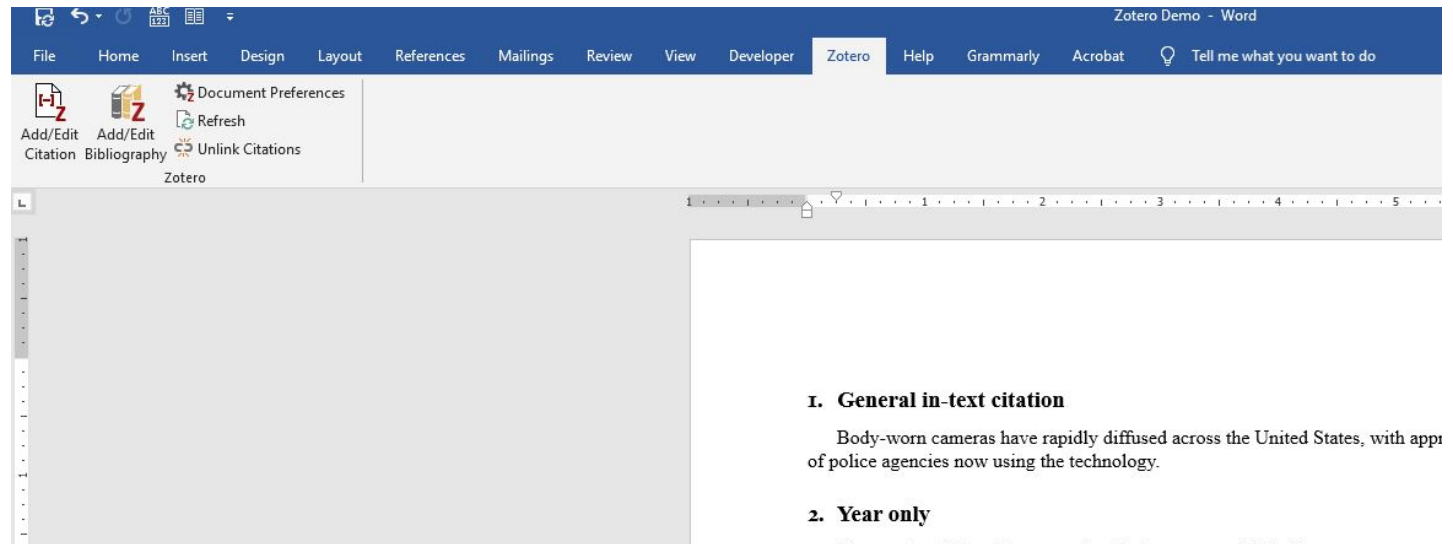
# CITE AS YOU WRITE (DEMO)

- 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?
- Email me: [ian.adams@utah.edu](mailto:ian.adams@utah.edu)
- Website: [ianadamsresearch.com](http://ianadamsresearch.com)
- [PDF of today's presentation?](#)
- Youtube link: <https://www.youtube.com/watch?v=4f2htunzhYY>

