Creating Zotero Workflows

June 15 2022

Schedule Overview

7:05 EST: Zotero Storage

7:10 EST: Creating workflows

7:25 EST: Create your own!

7:45 EST: Small group reflection

8:00 EST: Creating a retrospective project

8:10 EST: Next week's prep

Zotero Storage Options

Zotero Storage

Zotero Storage provides online storage space for your Zotero files, allowing you to synchronize PDFs, images, web snapshots, and other files among all your devices, share your Zotero attachments in group libraries, and access files via your online library on zotero.org.

Individual Pricing

Storage Limit	Cost (USD)
300 MB	Free
2 GB	$20/year (equal to $1.67 per month)
6 GB	$60/year (equal to $5 per month)
Unlimited	$120/year (equal to $10 per month)

Purchase Storage

In addition to individual storage subscriptions, we also offer storage plans for labs and institutions.

Group Libraries

Zotero groups can also use Zotero Storage at no additional charge. Group file storage always draws from the storage account of the group owner.

Creating a Zotero Workflows

Components of a Zotero Workflow:

- Organization–how do you want to organize your information?
- Note-taking–how do you want to take notes?
- Tagging–what sorts of tags do you want to use?
- Storage–where do you plan on storing your documents?
- Maintenance plan–how will you keep your info up-to-date and backed up?

Create Your Own!

Start a draft of your Zotero workflow. Here are some facets you might consider:

- Organization
- Note-taking
- Tagging
- Storage
- Maintenance plan

We will spend 20 minutes working on this

Small Groups

In small groups, share out your plans. You might want to discuss:

- What do you feel good about?
- What features are you looking for that Zotero doesn't have?
- Do you think this workflow would actually work?

Launching a Retrospective Project

1. Identify issue(s)
2. Create workflow(s) to address the issue(s)
3. Prioritize how you will execute the workflow
4. Set a deadline for when to complete the project

For Example

1. Many of my records are missing bibliographic information
2. Workflow:
    a. Utilize "Title" "Creator" and "Year" tabs to identify records which are missing those features
    b. Export library to Excel doc and use the Filter feature to identify records missing other characteristics (mainly journal title, volume/issue number, date, pages). Update these manually in Zotero

¾. I will spend 2 days doing this