Zotero: Bibliography Nightmares No More!

Jennifer Lin

2021-08-26

The Premise

You have likely written papers for classes in previous High School or College courses where you are asked to open up a word document, set the page to 12-point Times New Roman font, double-spaced with 1 inch margins on all sides, and write something to turn in to your instructor. If this was a research paper, you likely have had to keep track of numerous sources and cite them by hand. You likely wrote out the author and year in parentheses and typed out the citation yourself, following the guidance of Purdue Owl[1] based on the style your instructor requested (MLA, APA, Chicago…). In lieu of doing this by hand, you likely have tried EasyBib[2] or just copied off the Google Scholar cite tool.

[1] https://owl.purdue.edu/

[2] https://www.easybib.com/

However, while this process works, it is, in my honest opinion, working hard without working smart. There are some problems to this method that may not be as time or energy efficient. This is especially the case if, moving forward, you are interested in conducting research. You will likely find an article that you read for a class and use for a paper. You may type up the citation in APA for the class. Later, you might find yourself returning to cite the same paper, this time in Chicago or some field-specific citation style.

In short, doing references by hand presents several issues:

1. It is simply a pain.
2. It involves keeping track of all your sources (somewhere) – including where you got them, who wrote them. You can easily lose this or just forget that you read a paper on a topic to begin with and need to spend more time rereading
3. You need to redo the reference list for every style guide change because MLA, APA, Chicago are all different. It can become difficult to memorize the style guides, especially as their differences are sometimes small.

Introducing Citation Managers

Given the problems discussed in the previous section, the best way, in my opinion, to work smart and not hard is by using a citation manager. **Citation Managers** are tools that can help you *search*, *read*, *organize* and *cite* a range of sources. Citation managers are beneficial for several reasons:

1. You can store citation information for articles as soon as you find them
2. You can organize these sources in meaningful ways – using folders, tags, or keywords
3. You can write and store notes, and even generate annotated bibliographies so all your sources and notes are in the same document
4. You can automatically insert in-text citations and reference items as you write, using the correct citation style and quickly switch between styles if you find that you made a mistake.

Installing Zotero

Let's install Zotero at `https://www.zotero.org/download/`. Be sure to get both the Desktop Application and Chrome Plugin.

As soon as you install and start Zotero, you should also get a Zotero Plugin for Word, LibraOffice and Google Docs (in Chrome). If not, you can visit `https://www.zotero.org/support/word_processor_plugin_usage` to get the plugins[3].

[3] Additional plugins can be found `https://www.zotero.org/support/plugins`

Using Zotero

For this walkthrough, I consider the following research question:

> **Do political behaviors for rural residents differ from urban residents?**

You will often want to break down research questions to find sources.

- What is political behavior?
- How does research distinguish between urban and rural?
- What does the research say about urban-rural political behavior differences?

In general, here are some good places to look for citations:

1. Google Scholar: `https://scholar.google.com/`
2. NU Library: `https://www.library.northwestern.edu/`
3. Reference list of papers that you read that are relevant to your research topic
4. "Cited by" feature on Google Scholar

In this case, we will search for "rural urban political behavior" in Google Scholar and will take the first result[4].

When you visit the landing page of the article, you can see an option to "Cite this Article". This is shown in Figure 1.

[4] At the time these notes were written, Gimpel et al's "The Urban–Rural Gulf in American Political Behavior" was the first result.

Figure 1: The Landing Page of "The Urban–Rural Gulf in American Political Behavior"
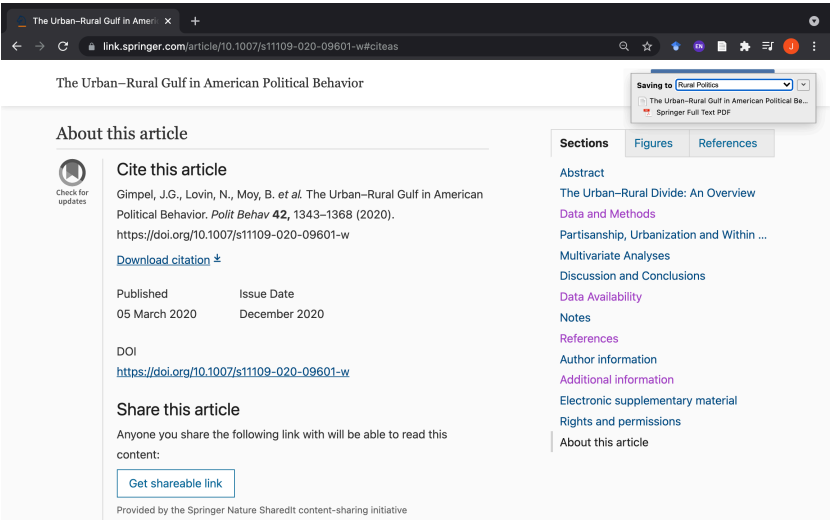

Figure 2: The Citation Page of "The Urban–Rural Gulf in American Political Behavior"

When you click on it, it will take you to the citation generated by the publisher, as shown in Figure 2.

As we discussed earlier in this section, the default is not optimal because it does not conform to your class or paper requirements. Therefore, if you installed the Chrome plugin, you can simply click on it and it will export to Zotero, to a folder that you specify. This is shown in the upper right hand corner of Figure 2[5].

[5] Be sure that you **have Zotero open** or this will not work

Now let's look at the Zotero Desktop. Figure 3 shows the setup. Looking at Figure 3, we can see that, on the left hand side, there is a layout of all your files[6]. In the center, there are all of your articles. Notice that if you click on the down arrow on the left hand side of each citation, you can see the attachments. Here, we have a full text PDF from the publisher![7] On the right hand panel, we see that there are the article specifics that Zotero extracted from the publisher website. These details include title, author(s), abstract, journal, pages, dates, and (basically) everything you need to make a good citation.

[6] Create a new file using the "New Collection" button on the upper left hand corner.

[7] You may need to be logged into the Northwestern VPN to ensure that Zotero can access the full text PDF.
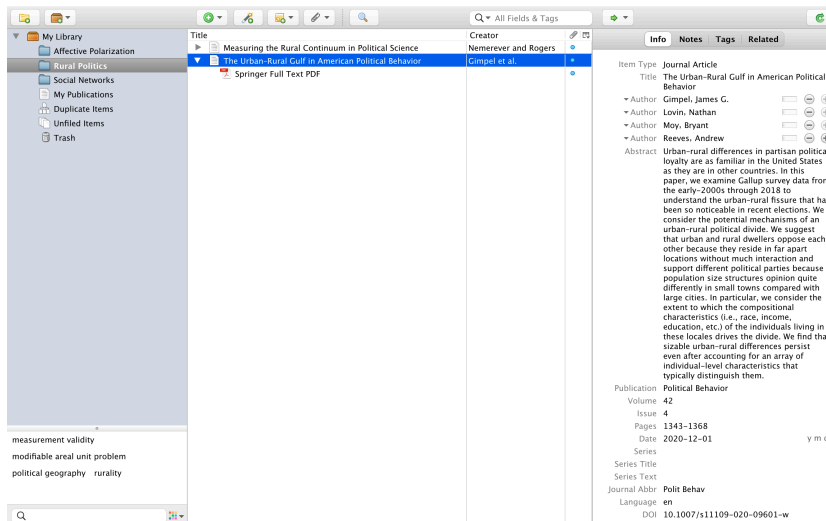

Figure 3: Zotero Desktop Layout

Now, we will generate a bibliography entry. First, we will right click on the article we want to export. This step is shown in Figure 4.

Next, we will pick from the list of citation styles the one we want[8]. For this exercise, we will use Chicago Author-Date. After this, pick the requirements that you need. Under Output Mode, "Citations" generate in-text citations while "Bibliography" generates a bibliography entry. You can export this as a Rich Text file (RTF), HTML entry, Copy to Clipboard (to paste elsewhere) or Print it. For now, we will just copy it to clipboard and paste it in a Word Document. The settings that I am selecting for this demo is shown in Figure 5.

Once I hit "OK", the bibliography entry is copied onto my clip-

[8] Don't see yours? Click on the "Manage Styles" to add more styles or visit the Zotero Style Repository at https://www.zotero.org/styles to search and add styles.
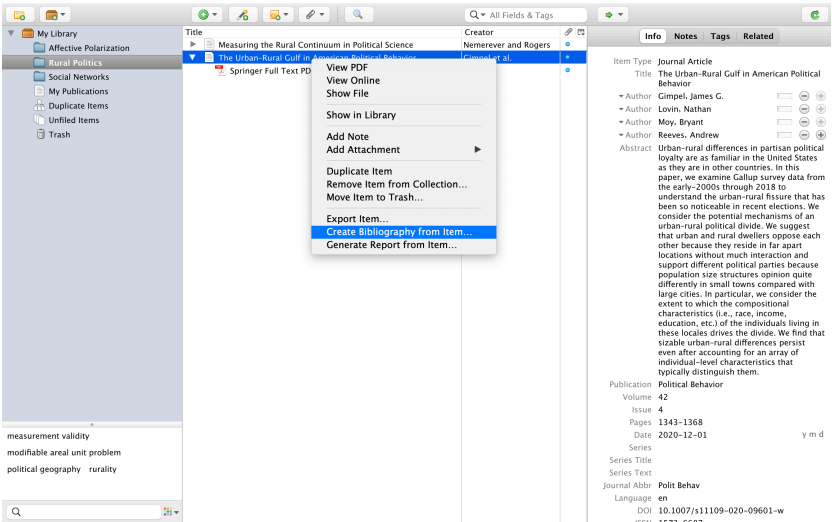
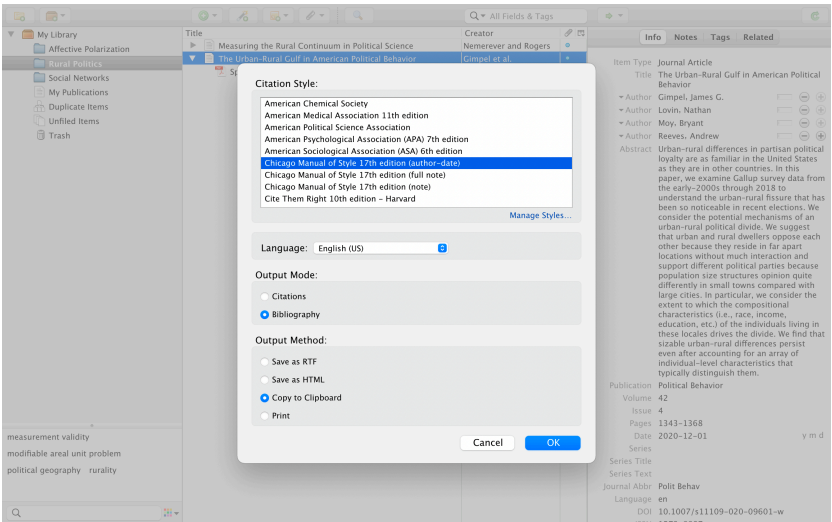Figure 4: Generate Bibliography Step 1: Right Click on Source

Figure 5: Generate Bibliography Step 2: Set Preferences for Entry

board. I can now paste it in a word document. This outcome is shown in Figure 6. Notice how the indentations for an entry, along with proper italics per style guide requirements are all present.

Figure 6: Generate Bibliography Outcome: Paste to Document

REFERENCES

Gimpel, James G., Nathan Lovin, Bryant Moy, and Andrew Reeves. 2020. "The Urban–Rural Gulf in American Political Behavior." *Political Behavior* 42 (4): 1343–68. https://doi.org/10.1007/s11109-020-09601-w.

How I Use Zotero

- Find, sort and keep literature for my various research interests into separate folders
- Helps me organize my projects such that I can keep all the articles I cite for one paper in one folder
- Saves me a lot of time and helps me generate citations quickly based on paper requirements

Exercise

1. Create a new folder in Zotero
2. Find 4-5 articles or books that suit a research area of interest and add them to the folder in Zotero
3. Open a Word document or Google Docs and type some words. Incorporate at least 3 of the citations that you found in Step 2. You can use the copy-paste method we explored or see Question 4
4. CHALLENGE: Use the Zotero Plugin to create your bibliography and insert in-text citations with the Chicago author-date format. Now, supposed you messed up and your instructor had asked for American Sociological Association (ASA) or American Psychological Association (APA) citation style. Change your document citation style.
5. EXTRA CHALLENGE: When you have the citations in Chicago author-date, do part 2 of Question 4 with only **three** clicks.