

Zotero Workshop Outline

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1. Introduction
 1. Who am I, what are we talking about
 2. Citation and Resource management tools - anyone already using them?
 3. What is Zotero and why would you want to use it
 1. loose translation of the Albanian for “to master”
 2. App, browser connectors
 3. Word/LibreOffice plugins
2. Installing Zotero
 1. Go to <https://www.zotero.org/download/>
 2. Install the Zotero app (e.g. “Zotero 5.0 for Mac”)
 3. Make sure you have the browser extension(s) that you need
 1. Problems with Safari extension - doesn’t work as well as Chrome or Firefox extensions - use those instead, if you can
 2. Currently no extension for IE/Edge or mobile browsers, but there is a bookmarklet that will work for these, without all the features
 4. Create a free account
 1. Sign in to this account once you open Zotero
 2. We’ll do more with this later
3. Getting stuff into Zotero
 1. Dump some PDFs in - have folder on desktop
 1. Show “retrieve metadata” (works automatically now)
 2. Talk about how this works (file needs to be OCR’d PDF, needs to be something that would be on Google Scholar)
 2. Show “create parent item”
 1. You can now manually enter information
 2. Show different item types - changes the fields available and what they are named
 3. Show that you don’t need to fill in **all** fields (i.e. only need ones that are necessary for citation)
 4. Show how to add multiple authors, change between au-

thor/editor/translator, and change between **last**, **first** and corporate author

3. Have open to show browser extension:
 1. Google Scholar
 2. JSTOR (**important** to show that you need to agree to JSTOR TOS **first** before you can download PDFs automatically)
 3. Amazon (good for finding book metadata)
 4. NY Times (or other relevant newspaper site)
 5. YouTube/Vimeo (to show video translator)
 6. MIDCAT
 7. A relevant library database (something with and something without full-text PDFs can be helpful to point out the difference to students)
4. Important points to make
 1. Metadata - it is only as good as the database, so check it
 2. Set up an example with something wrong (e.g. author name or title in all caps)
5. Organizing your stuff in Zotero
 1. Notes - for your annotated bibliography?
 1. You can have as many notes as you want for an item
 2. They are searchable
 3. Can also use the “extras” field in bibliographic metadata for short notes/categorizations
 2. Tags & relations
 1. Can use tags however you want
 2. Some may be automatically downloaded from databases/MIDCAT
 3. Organize it into folders
 1. Folders are not moving items
 2. They can be in multiple folders
 3. Can have subfolders
 6. Creating from scratch
 1. Use the green plus sign
 2. Can make records for anything you want (e.g. rocks, specimens, whatever)
4. Getting stuff out of Zotero
 1. Have MS Word open, with a blank document
 1. Show different icons, where to find them in – address the fact that different versions of Word will be slightly different
 2. Citation styles - make sure to show how to switch while writing (using “Document Preferences”)
 3. Write some stuff, show a few “add citations,” show how to “add a bibliography,” then add citations to show they keep getting added to bibliography (effective to show how it keeps alphabetical order)
 4. **EXTREMELY IMPORTANT**
 1. Explain that you cannot simply click on a citation and then

- edit it *within* Word
- 2. You need to click on a citation, or bibliography entry, or footnote (or anything *created by Zotero*), and then click the icon in the menu bar to edit citation, etc.
- 3. If you click on a citation and edit it within Word, you will be breaking the link between the citation and the bibliography entry, and the link to the Zotero library
- 4. If you do this, the only solution is to unlink citations, copy/paste the entire thing into a new document, and then go back and add each citation again
- 2. Drag & drop
- 3. Create bibliography from item - useful for putting citations into emails or into Google Docs
 - 1. Inline citations
 - 2. Bibliography
- 5. Zotero Extras
 - 1. Syncing your library (300 mb limit)
 - 1. Okay if you have few PDFs, or if you only have black-and-white text PDFs, easy to reach limit with high res color images or big documents (e.g. government reports) though
 - 2. There are ways around the limit
 - 1. Can keep PDFs separate from the citation information/notes
 - 2. Can use a separate cloud storage space with WebDAV capability (e.g. Box)
 - 3. Also, the storage is really very affordable for the amount they give you!
 - 2. Groups
 - 1. Group libraries can be Private, Public/invite-only, or Public/open
 - 2. Only private libraries can share PDFs
 - 3. Group libraries are separate from your personal libraries (i.e. you can have a personal library that “syncs” with a group library)
 - 4. Useful for group projects, sharing bibliography on posters/presentations, creating community of practices libraries
 - 3. How to back up
 - 1. Export RDF file (not a true, full backup)
 - 2. True Backup
 - 1. Locate your Zotero data directory (see below)
 - 2. Making sure Zotero is closed, copy the entire “zotero” directory (including all the subdirectories)
 - 3. Put this copy in a safe storage spot that is not your laptop
 - 4. Good choices include your Google Drive, OneDrive, or an external hard drive
 - 5. For even more redundancy, put a copy in two (or even three) of the above locations (at least one “off site,” e.g. cloud storage) - make sure to update them all every time you make a new backup

6. **Your back up is only as good as your back up schedule.** If you do not have a program to automate your back ups (e.g. Time Machine on Macs), make sure you regularly do your back ups to ensure you always have up-to-date data.
Put a repeating event on your calendar to remind yourself!
4. Can export/import with other citation management programs using RIS (i.e. from Endnote)
5. Using the “search within Middlebury”
 1. [go/zoterosearch/](https://go.zoterosearch/)
6. Wrap up
 1. Zotero LibGuide
 2. Zotero Documentation/Forums (on the Zotero website)
 3. [go/ryan/](https://go.ryan/)
 4. All librarians at the Research Desk can help with Zotero questions!