

Introduction to Zotero - 2014

**Environmental Design Library** 

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### **Citation Management Made Easy**

- Citation management software eases task of collecting, managing and publishing bibliographies.
- Zotero covers new media (blogs, emails, YouTube, etc.)
- As with all citation managers, you must check the quality of the citations... **GIGO**.



# **Zotero History**

- Open and extensible (General Public License)
- Initially released October, 2006.
- Version 2.0 (server storage and sharing) rolled out in February, 2010
- August, 2011 "Zotero Everywhere" released with "connectors" for Chrome and Safari 2012
- Zotero 3.0 for Firefox AND Standalone released 2012
- Current release is 4.0 (April, 2013)



#### **Zotero Mobile Apps**

Zandy is well on its way to being the first full-featured mobile Zotero application for Android devices. Users can currently edit and view their Zotero libraries, add new items, and work offline. Future releases promise even more functionality.

Scanner for Zotero lets you add books to your Zotero library from anywhere, with no need to have Zotero installed anywhere. Simply scan a book's ISBN barcode with your Android phone, and the software will add the book to your Zotero library directly on our servers.

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BibUp allows iPhone users to add books to their Zotero libraries much like Scanner for Zotero, and it also provides the additional functionality of photographing specific pages to be collected, on which BibUp will even perform OCR.

ZotFile Reader eases the transfer of Zotero-based PDFs to and from mobile readers like Android devices and the iPad. It builds on the success of the original ZotFile extension, which significantly enhances Zotero's built-in PDF management by automating the attachment of PDFs to Zotero items, and the renaming of those files according to userconfigurable rules.





# **UC Berkeley Library Subject Guide**

http://www.lib.berkeley.edu/alacarte/subject-guide/188-Zotero



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### **Quick Start Guide (many video tours)**

http://www.zotero.org/support/quick\_start\_guide

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# Installing Zotero <u>http://www.zotero.org/download/</u>



- **Embedded** in Firefox browser OR **Standalone** for Safari, Chrome or Firefox
- Do NOT install multiple editions (e.g. standalone AND embedded Firefox editions)
- Open standalone before downloading citations. (Firefox embedded is always "open" in browser window.)

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# **Opening Zotero**

- Download latest version at <u>http://www.zotero.org/download/</u>
- Open Firefox browser
- Click Zotero link in lower right corner
- Or open Zotero standalone from icon (make sure to also load "connector" for appropriate browser)



#### **Version 4.0 Interface**

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🗍 Trash 🖵	The Interface: IBM and the Transformation of Corporate Design, 1945	. Gorman	2013		URL:

### What do all those icons mean?



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### **Adding Items - OskiCat**

- Folder icon in URL bar allows downloading of multiple citations
- Book icon automatically downloads single monographic citation
- Article icon does the same for articles



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#### Adding Items – Melvyl (but not Melvyl within OskiCat)



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### Adding Items – Amazon.com



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#### **Adding Items – ProQuest or Google Scholar**

• Some dbases only allow single article capture

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### **Adding Items – New York Times**



#### Adding Items – You Tube (remember GIGO)



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#### Adding Items – Manually: 32 formats



### **Metadata: Notes and Tags**

- Standalone and Child Notes
- Manually add tag
- Some tags added by catalog
- Drag item onto tag
- Search tags



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green roof regulates too much heat from the sun...this can b a potent solution for global warming! cool...

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### **Adding Attachments**

- Attach Snapshot of Current Page allows capturing .html of existing web page.
- Link to Current Page captures url, but not .html.
- Link to URI (url or uniform resource name)
- Attach Stored Copy of file for reading when offline; can delete the original stored copy.
- Link to File saves Zotero server space but requires access to hard drive where file exists.
- In some databases (e.g. Google Scholar) can drag and drop link to .pdf which will attach a stored copy.







### **Attaching Snapshots**

- Search on "green roof"
- Drag and drop Wikipedia article into appropriate Zotero folder
- Url and snapshot automatically added
- Snapshot shows date and timestamp and actual html of the page... it's permanent



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# **Sorting and Searching for Items**



- Sorting within center panel
- Searching basic and advanced
- Searches notes, tags, attached documents, etc.
- Save search for future use

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# **Outputting a Bibliography 1: Drag 'n Drop**

- Actions → Preferences → Export → select default output style
- Drag and drop selected items into any text-based program
- Set new output style when citing

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### **Bibliography 2: Create from collection**

- Highlight desired folder
- Right click and select "Create Bibliography from Collection"
- Select citation style and output format (e.g. "copy to clipboard")
- Paste into any document



# **Outputting a Bibliography 3: Word Plug-in**

• Get word processor plugins from

http://www.zotero.org/support/word\_processor\_plugin\_installation

- Use icons in toolbar to insert citation after selecting citation style
- You can change the style later via the "set document preferences" icon

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# **6750 Citation Styles**

- Click on "gear" action icon
- Select preferences
- Select "Cite" tab; "Styles"
- Click on "Get additional styles"
- "Install" style you like.

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### **Retrieving Metadata from .pdf's**

- Drag and drop .pdf into Zotero folder
- Right click on .pdf icon
- "Retreive metadata for PDF" creates an item and puts .pdf into it. (first time you'll need to add a small add-in)

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### **Synching with Server and Home**

- Synching and sharing requires you register with Zotero for an account
- Actions → Preferences → Sync
   → User name → Password
- Reset tab: use with care



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### **Collaborate with Group Libraries**

- Must log-in to Zotero.org with name and password
- Add members, determine privacy, transfer ownership, determine editing rights, etc.



# Full text can by synched as of 11/13

New: Full-Text Content Syncing         Zotero can now sync the full-text content of files in your Zotero libraries         linked devices, allowing you to easily search for your files wherever you of your files will not be shared publicly.         You can change this setting later from the Sync pane of the Zotero prefet         Use Full-Text Syncing       Not Now	x with zotero.org and other are. The full-text content ferences.		
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fornia High-Speed Rail and Economic Development: Station-Area Market Profiles and Public Policy Responses	Murakami and Cervero	2010	

### **Additional Storage Fees**

- First 300 Mb Free (goes quickly if you store copies of .pdf's)
- 2 GB\$20/yr. (\$1.67/month)
- 6 GB\$60/yr. (\$5.00/month)
- No cost for collaborators (as there is with Mendeley)

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### **Some Extras**

- For **capitalization** problems, right click title and choose from Transform Text menu.
- Deduplication at bottom of collections, or right-click and "Merge Items"



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# **Adding UC-eLinks to Zotero**

- To ease search for full text
- Click on the Action Icon
- Choose Preferences
- Under the OpenURL section of the "Advanced" tab, copy the following into the "Resolver" box: http://ucelinks.cdlib.org:8888/sfx\_local
- Configuration: <u>http://www.zotero.org/support/locate</u>
- Right arrow above item's "Info" tab will now search UC e-links from "library lookup"



#### **Creating a Collection Timeline**

- Actions →
   CreateTimeline
- Another way to view citation data



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### **Transferring Citations into Zotero**

- Export using RIS preferred
- From RefWorks export as either "Bibliographic software" or "BibteX"
- Best to import folder-by-folder and drag each group of imported items into a new folder in Zotero.
- Princeton guide to importing and exporting at:

http://libguides.princeton.edu/content.php?pid=30227&sid=230429

• Check to make sure essential data came over.



### Issues/concerns

- As with any citation manager, you need to review citations for accuracy. It's easy to edit citations in Zotero.
- May be more accurate to download individual citations from icon than a group via the group folder.
- Zotero now has a de-duplication feature.

### **Creating Communities of Practice**



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