Getting Started with Zotero!

FREE Reference Management Software

The BASICS

Created by UMass Amherst Biochem and Molecular Biology Students

1

Last Updated 4/23/21

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First of all, Why Zotero?

- **Free** and easy tool to help you collect, organize and share references for your research and writing papers in a personalized database!
- Keeps all your sources organized in folders!
- Connects to web browsers detects content as you search the web, and saves to your Zotero database with one click!
- "Cite while you write" with <u>Google Docs</u>, <u>Microsoft Word</u>, and <u>Libre Office</u>!
- Creates formatted bibliographies automatically!

Downloading Zotero

(~5 mins)

Downloading Zotero



FOR MORE ON DOWNLOADING + INSTALLING VISIT: <u>https://youtu.be/tcreauMno6l</u> (~3 min)

Downloading Specifics

- Download Zotero 5.0 for Windows or Mac
 - IMPORTANT Also download Zotero Connector for your browser of choice
- Register for a free zotero.org account





For Firefox Install connector after program



Here's what it looks like on Mac vs. PC

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ATPSynthase2014-2019-9	Three 5/15/20	 Author 	Friedman, Jonathan 🥅 😑 🛞
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• Use the search bar at the top of the window to search through everything in your library

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Q

Adding to your Library

Where to Find Literature on the Web

Here is a list of databases that are useful when starting your research:

- PubMed https://pubmed.ncbi.nlm.nih.gov/
- UMass Library Database https://www.library.umass.edu/
- Web of Science http://www.webofknowledge.com/



University of Massachusetts Amherst

Adding to your Library from the Web

- In your browser, search for an article (ex. Search in Database from previous slide)
- Click the Zotero icon at the top of your browser to save a citation from that page (It will look different depending on how many articles there are in your list)

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• A pop-up window will appear on the upper right of the screen and will indicate where your citations are being saved in your Zotero library



MORE ON SAVING REFERENCES TO YOUR LIBRARY: <u>https://youtu.be/d9fkwolTfbM</u> (~3 min)

Here's what it will look like when it is directly sent to your Zotero —>



Adding to your Library cont'd...

• If you are in a database, search your topic, and you can select as many of the search results as you want



• IMPORTANT: if you are adding a source with a <u>video</u> or <u>image</u>, you may need to hand cite some of the info, but any added source can be edited in your library

Adding to your Library cont'd...

If you have an existing item that you want to your library:

- **Click & Drag** the PDFs from your computer library directly into your Zotero library
 - Zotero auto-fills the metadata (citation information) it recognizes

Or:

- Click the new item button () and choose the type of item you want to add
- Click Link to File...
- Select the item you want to add



Adding by ISBN, DOI, PMID, arXiv



Easily add a number of ID number from top search bar-

- ISBN International Standard Book Number
- <u>DOI</u> Digital Object Identifier
- <u>PMID</u>- PubMed Identifier (add straight from PubMed database)
- <u>arXiv</u> Archive for scholarly articles

Manually Adding References to Your Library

- Highlight the folder in your Zotero library that you want to add the reference to
- Click the new item button () and choose the type of item you want to add
- Type in each field necessary for your citation
- Edit citations by clicking on a field





Organizing Your Library

- Create and edit collections (folders) to organize
 your work
- To move an item to Trash, right click, and choose "Move Item to Trash" - or highlight and click delete on keyboard

(*Items stay in the "Trash" folder until you empty it*)

• \rightarrow can change when items will be automatically deleted in Preferences : Automatically remove items in the trash deleted more than 30



days ago



Building and Organizing your Zotero Library

Tabs you will see in your Zotero Library:

- **Unfiled items** items you have not put into a sub collection
- **Duplicate items** items that you have downloaded more than once (can see when viewed and differences of duplicates so you can decide which you want to be "item of record")
- Specify what you want in middle columns from the dropdown menu



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Citing and Creating Bibliographies

Add Zotero to Word & Google Docs!

Never hand-enter reference citations again!

Add/edit citation Ctrl+Alt+C

Add/edit bibliography

Document preferences

Refresh

Unlink citations

GOOGLE DOCS



MICROSOFT WORD

How to Cite While You Write - <u>GOOGLE DOCS</u>

- To add a citation from Zotero into your work, click "Zotero" at the top of the Google Doc
- From the dropdown menu choose "Add/Edit Citation"
- Pick citation you want from dropdown menu
- Easily look up articles in your library HERE:

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	Add/Edit Citation	

 Or, open in your library →

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FOR MORE VISIT: https://youtu.be/E5_xjfm57wU (~4min)

Add-ons

Aria

Zotero

Help

Refresh

Add/edit citation ...

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How to Cite While You Write- MICROSOFT WORD

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References

Citation Style:

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American Medical Association 11th edition American Political Science Association American Psychological Association (APA) 7th edition

American Sociological Association (ASA) 6th edition Chicago Manual of Style 17th edition (author-date) Chicago Manual of Style 17th edition (full note) Chicago Manual of Style 17th edition (note) Cite Them Right 10th edition – Harvard

Home

Citation

Bibliography

- Click on the Zotero tab on the top bar •
- Choose from drop down menu- "Add/Edit Citation"
- Choose citation style
- Easily look up articles in your library HERE:





OR open in classic view in your library \rightarrow

* ALSO COMPATIBLE WITH LIBRE OFFICE!!

	2
Ζ	Ζ

Manage Styles

Document2

Tell me

View

Review

Zotero

Creating Bibliographies from your Zotero Library

- Select references or collections to include in your bibliography→ hold control to select multiple references
- Right click selection and choose "Create Bibliography"
- Choose bibliographical style you want
- Click "Copy to Clipboard" and press OK
- Paste wherever you like (ex. Google Docs or Word)

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Citation Style: American Chemical Society American Medical Association 11th edition American Poytchological Association (APA) 7th edition American Sociological Association (APA) 7th edition American Sociological Association (ASA) 6th edition Chicago Manual of Style 17th edition (author-date) Chicago Manual of Style 17th edition (note) Chicago Manual of Style 17th edition - Harvard Manage Styles... *click "manage styles" for more style options

FOR MORE ON CREATING CITATIONS VISIT: https://youtu.be/Wcla7iFXnLs (~7 min)

Creating a Bibliography while Writing

- While typing a paper with in-text citations from your Zotero library, you can easily create a bibliography
- Put cursor at end of paper
- Click "Add/Edit Bibliography"
- Change to APA (7th) citation to order alphabetically
- *Make sure to ensure all information you are looking for is included in the citations- you should **NOT** try to edit this directly, go to your Zotero library and change the entry for that citation or you will get an *ERROR*
- To make sure someone else can open save as PDF or unlink citations

Collaborating with Zotero

Group Libraries

• Share with your colleagues or peers!

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Public, Open Membership Anyone can view your group online and	Public, Closed Membership Anyone can view your group online, but	Private Membership Only members can view your group
Public, Open Membership Anyone can view your group online and join the group instantly.	Public, Closed Membership Anyone can view your group online, but members must apply or be invited.	Private Membership Only members can view your group online and must be invited to join.
Public, Open Membership Anyone can view your group online and join the group instantly. Choose a Public, Open	Public, Closed Membership Anyone can view yeur group online, but members must apply or be invited. Choose Public, Closed	Private Membership Odly members can view your group online and must be invited to join. O Choose Private Membership

- First, make sure syncing is turned on (see next slide)
- In library, go to groups, click "Create a New Group"
- Can make group public, public viewable, or private (best for students)
- Add people through email, even if they don't have Zotero (they can sign up after being invited)
- As owner of group, sharing PDFs will only eat into **your** data max

Group Libraries- Ensuring Syncing is On

- To make sure synching is turned on to collaboratively work in group libraries, go to Zotero Preferences
- Click on Sync and log into browser account



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ser account	Data Syncing Username: Password: Set I	Settings Reset Create Account Lost Password? About Syncing
 Set your preferences *tip: to save space 		Settings Reset Data Syncing Username: Unlink Account Choose Libraries Choose Libraries Sync automatically © Sync full-text content About Syncing File Syncing Sync attachment files in My Library using Zotero Download files at sync time S
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Group Libraries Settings

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(Windows/Linux) or Command key (Mac) to select more than one discipline.

Home > Groups > "Group Name" > Settings

"Group Name" Settings

Group Settings + Members Settings + Library Settings

Group Type

Private

O Public Closed

O Public Open Controls who can see and join your group

Library Reading

Anyone on the internet

Any group member
 Who can see items in this group's library?

Library Editing

Any group members

Only group admins Who can add, edit, and remove items from this group's library?

File Editing

Any group members

Only group admins

 \bigcirc No group file storage Who can work with files stored in the group? Public Open groups cannot have file storage enabled.

Save Settings



- It is best to collaborate on documents with Zotero citations using Google Docs
- Moving documents with Zotero citation links between word processors is possible but challenging!
 - You risk losing links between citations and bibliography if done incorrectly
- Guide to moving documents between word processors:
 - <u>zotero.org/support/kb/moving documents between word processors</u>

Additional Zotero Features

Table of Contents

- Data Storage (27)
- <u>Tags</u> (28)
- Zoterobib (Bibliography Generator) (31)
- Off Campus Tip (32)

Data Storage on Free Account

- Zotero gives a maximum of 300MB of file storage for free to all users
- If you want to exceed this, more storage *can* be bought
- However, to minimize storage use (helpful for students), you can choose to either save the entire pdf (uses up more storage) or instead save just the source (less storage space) → to do so, go to Preferences and in General, unclick : ♥Automatically attach associated PDFs and other files when saving items

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)	

- Sync to email if you want access on other devices
 Password:
 Set Up Syncing
 - *FOR STUDENTS: Remember to link your
 Zotero to an email you will have access to after graduation if you start with school email !!!

How to Add Tags

• Tags help further organize and sort your papers

CREATING A TAG:

- Click on a the item in your library you want to create a tag for
- On the right hand side, a column called "Tags" will appear
- In the Tags tab click "Add" to add a tag, and then type what you would like to call the tag into the box below
 - Tags can be include topics, methods, status, ratings, etc.



	Info	Notes	Tags	Related	
0 tags:	Add				
6					e

Using Tags

- There are no limits to the number of tags an item can have
- Once a tag is made, they are easily searchable using the search bar at the top of your library
- You can also filter your library or a collection to show a set of one or more tags using the tag selector on the bottom left of Zotero
 - Clicking a tag will show all of the items with this tag in the selected collection



0 taos selected

Deselect All

J Show Automatic

✓ Display All Tags in This Library

Delete Automatic Tags in This Library.

alternative oxidase alternative pathway

amino-acid-composition Animals

Amino Acid Sequence

annotation Antigens, CD

Zotero



The protoscome: friend and foe of mitor

Q - All Fields & Tags

10 -

Note Taking

- Note-taking
 - Types of notes:
 - Standalone (its own item)
 - Child Note (added to another item)
 - Searchable and easily editable
 - Text saves as you type
 - Can also be tagged or related to other items



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CQ		Info	Notes	Tags	Related	
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Zoterobib → <u>https://zbib.org</u>

- Free and easy way to build a bibliography instantly without an account or software installation
- Bibliography is stored in browser's local storage
- Over 9,000 citation styles
- Can create a link to the bibliography version to open on another browser or share



OFF CAMPUS TIP

• Set the UMass Libraries as your favorite library: click "Edit or Zotero," "Preferences," then in "Advanced," enter

"https://sfxhosted.exlibrisgroup.com/umass" as resolver, version 1.0



This will allow you to find full text versions of items in your library by clicking the green Locate button!



Questions/Comments?

Fill out our **Google Form** to provide feedback: <u>forms.gle/Fpsea6ftiknFXSeIA</u>

Zotero Help & FAQs:

zotero.org/support/start

Using Zotero

- Getting Stuff Into Your Library
 - Adding Items
 - Adding Files
 - Feeds
 - Retrieve PDF Metadata
 - Importing from Other Reference Managers
- Organizing Your Library and Taking Notes
 - Collections and Tags
 - Searching
 - Sorting
 - Notes
 - Related Items
 - Duplicate Detection
- Generating Bibliographies, Citations, and Reports
 - Creating Bibliographies within Zotero
 - Word Processor Integration
 - <u>Citation Styles</u>
 - <u>Reports</u>
- Syncing, Collaboration, and Backup
- Data and File Syncing

What is your re	ole? (Check all that apply) *	
Undergradu	uate Student	
Graduate S	tudent	
Professor		
Researcher	·	
Other:		
What Universit	ty do you attend? *	

Zotero Feedback