Zotero training at Princeton University Library (February, 2017)
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Zotero is software that easily allows you to collect bibliographic information (title, author, date, publisher) of books, journal articles, webpages, photos, etc.

Will save citation and pdf (when available, if you've chosen this option in "Settings"). Takes snapshot of page, too, if you've chosen this option.

Jason Puckett from Georgia State University literally wrote the book on Zotero. His libguide and handout can be found http://research.library.gsu.edu/zotero. http://research.library.gsu.edu/id.php?content_id=25446111

Info on 300 MB free storage can be found at https://www.zotero.org/support/storage


Two parts to using Zotero—gathering citations and Write and Cite, which is implemented via add-in to Word. The Zotero add-in looks different for Mac vs. PC and depends on your version of Word (see last page of this handout). I suggest users create a bibliography AND PROOFREAD it before beginning the Write and Cite phase.

OVERVIEW OF TODAY'S TALK
1. Download and Install
2. Set preferences
3. Create a folder within Zotero
4. Capture citations; complete metadata, if needed
5. Create bibliography in prep for Write and Cite
6. Write and Cite
I. Download and Install Zotero

1. Close Word so that the following procedure can download the Word Write and Cite add-in.
2. Register for an account in Zotero.
   https://www.zotero.org/user/register/ https://www.zotero.org/user/register/ Confirm the account in your e-mail.
3. Select the Zotero download for the browser you are using from https://www.zotero.org/download/
4. Download the Zotero Connector which allows you to grab metadata from a website (scroll down to this box on Zotero.org).

II. A few Preferences need to be specified. They are located under the gear.

- Sync tab. Enter the name and password you just got when you registered. This will back up your citations and pdfs on their server.
- Search tab. Click the box in the middle of the page to enable Pdf indexing—indexing. If pdf isn’t OCR (Optical character recognition), Zotero doesn’t index it.
- Advanced tab. Change resolver to http://getit.princeton.edu/resolve
III. Create a folder in Zotero to gather your sources.

Collection (like sharing a common tag). Everything is in "My Library." Articles can be in multiple collections. Deleting from a collection doesn’t delete from everywhere. Deleting from My Library does.

IV. "Capture Icon" tells you that Zotero is communicating with current page. Click on the Zotero button (to the right of the browser address bar) to download sources. This connector button changes depending on whether you have multiple sources, books, or webpages.

Remember Citation info is from Metadata GIGO

Drag and drop from Desktop or Finder (MAC) into "My Library"

File formats—text is fine, RIS is best, RTF is more complex than RIS and usually not necessary. Avoid "export to Refworks," because format is problematic.

IV CONTINUED—Compete metadata

THE JOY OF PDFS—(right mouse for "Retrieves Metadata for PDF")
V. Generate bibliography to proofread
   Select items and generate right mouse button

VI. **Use the Write and Cite toolbar** in Word to insert citations and a bibliography. See the attached file for other possible versions of this toolbar. If you don’t see the toolbar, check under Tools>Templates and Add-Ins to make sure Zotero.dot is listed.

In some versions you have to look for the Zotero tool as a script.

On a Mac with Word 2015. The first (insert citation) and third (insert bibliography) are the only ones I ever use.

[Title]
For Windows machines you can easily create keyboard shortcuts. See https://www.zotero.org/support/word_processor_plugin_shortcuts. For Mac, it isn’t as straightforward.

Write and cite using Word plug-in/add-in

Inserting citations seems different for Mac and PC. Safari seems more problematic. Displays a “z” to the left of the address bar that indicates whether Zotero is online or offline. Sometimes “translates.”

Where is the Zotero toolbar in Word for Mac 2008 and 2010?

https://www.zotero.org/support/kb/no_toolbar_in_word_2008_plugin

VI. Two versions of citation tool (specify in “preferences”).

The red-bordered one above allows you to start typing a keyword. Or use the dropdown triangle to switch to “classic view.”