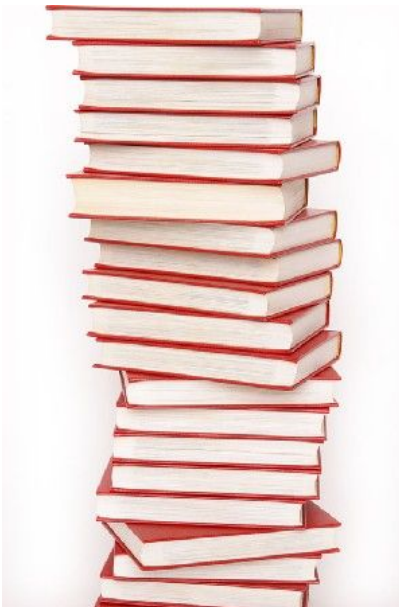


The New York Society Library Presents:



Citations Made Simple  
Using *Zotero* to manage your research

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# Citations Made Simple

## Using *Zotero* to manage your research

### Overview

This workshop will introduce users to the web-based research tool, Zotero. Zotero is an easy-to-use yet powerful research tool that helps you gather, organize, and analyze sources (citations, full texts, web pages, images, and other objects), and lets you share the results of your research in a variety of ways. It is an extension to the popular open-source web browser Firefox. Zotero integrates tightly with online resources; it can sense when users are viewing a book, article, or other object on the web, and—on many major research and library sites—find and automatically save the full reference information for the item in the correct fields. Since it lives in the web browser, it can transmit information to, and receive information from, other web services and applications; since it runs on one's personal computer, it can also communicate with software running there (such as Microsoft Word).

### Workshop Objectives

After this workshop users should have a general familiarity with Zotero and be able to:

- Download Zotero to your Firefox browser
- Access your Zotero library and create folders
- Capture and store citation information in your library from books, journal articles, and websites
- Organize and search your library
- Create bibliographies from your library
- Learn about advanced features of Zotero: syncing and in-text citation in Word

### Why Choose Zotero?

1. You need a free citation tool.
2. It's easy to use: Zotero's user friendly layout, similar to that of iTunes or Outlook, makes it simple to add citations and organize online resources.
3. You do a lot of your research on the free web: Zotero allows you to archive webpages and other sources that may be difficult to capture with proprietary tools like RefWorks and Endnote.
4. Zotero saves you time! Zotero generates bibliographies for you quickly and easily.

### Why Zotero might NOT be right for you

1. You do not use Firefox as your internet browser: Zotero works exclusively with Firefox.

### Who created Zotero?

Zotero, an open-source software, was created at George Mason University's Center for New Media in 2006. Funding for Zotero is made possible through the Institute of Museum and Library Services, the Andrew W. Mellon Foundation, and the Alfred P. Sloan Foundation.

## GETTING STARTED

Zotero tutorial video: <http://www.zotero.org/>

### **Downloading Firefox and Zotero**

Firefox 2.0 or higher is required for Zotero – you can download the latest version of Firefox from <http://www.mozilla.com/en-US/firefox/ie.html?from=getfirefox>

If you have Firefox 2.0 or higher, download the Zotero extension.

1. Go to <http://www.zotero.org> and click on the red *Download* graphic.



2. A dialog box will appear asking you if you would like to install your download. Click on *Install Now*.

### **Set-up a Zotero Account**

If you plan on viewing or using your Zotero library on various computers you may want to set-up a Zotero account. This will help with syncing your citation library between computers and sharing your research with colleagues or friends.

To set-up a Zotero Account go <http://www.zotero.org>

1. Click the link for “Register” in the upper right-hand corner
2. Enter your e-mail address, create a password, and then you will have the option to sync your library with the Zotero server

## NAVIGATING ZOTERO

### **Accessing Zotero**

Zotero exists as part of your web browser so you won’t need any log-in information or need to go to a specific website to access Zotero if you are on your home computer or laptop.

You can open Zotero in three ways from your Firefox web browser:

1. Go to the **Tools** menu and choose Zotero.
2. Click on the Zotero logo in the bottom right corner of your browser.
3. Click on the Zotero icon in your browser’s toolbar.



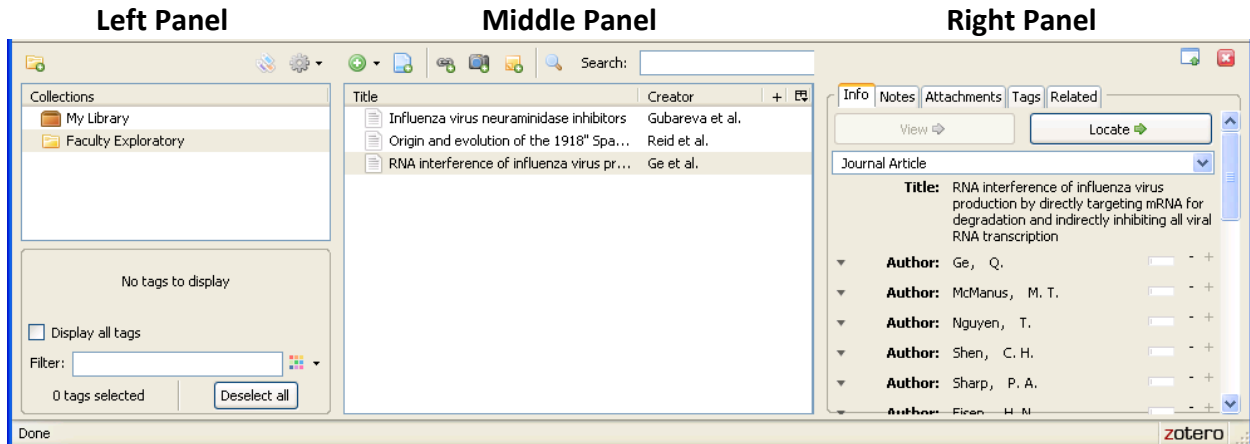
To close the Zotero window, click on the “x” in the top right corner of the Zotero window, or repeat any of the three steps you used to open the Zotero window.

### **The Zotero Panel Layout**

The Zotero window has three panels that represent different levels of specificity for your references.

- The **Left Panel** shows your Zotero libraries and collections, as well as “tags” (keywords).

- The **Middle Panel** displays items contained within the library or collection that you select in the **Left Panel**.
- The **Right Panel** displays information about the item that you select in the **Middle Panel**.

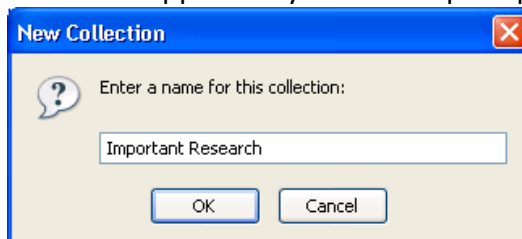


## ORGANIZING YOUR LIBRARY

### Creating a new collection

Within your Zotero library, you can create collections and sub-collections. Collections are folders that help you categorize your citations. Your collections are shown in the **Left Panel**. To add a new collection to your Zotero library:

1. Click on the New Collection icon (  ) in the **Left Panel**.
2. A box will appear on your screen prompting you to name your new collection.



3. Choose a name and click **OK**. Your new collection will appear in the **Left Panel** of the Zotero window.

### Moving Citations within your library and collections

If you would like to copy items from your library into a new collection:

1. Click on the citations you would like to move in the **Middle Panel**.
2. Drag the citation into the new collection in the **Left Panel**. A copy will appear in the new collection. This will not remove the item from its original location in your library.

## Renaming Collections

If you would like to rename a collection:

1. Click on the collection you would like to rename.
2. Right-click (PC) or use *Control* + Click (Mac) on the highlighted item and select **Rename Collection...**
3. A dialog box will appear on your screen prompting for a new name. Type in the new name and click *OK*.


## ADDING CITATIONS TO YOUR LIBRARY

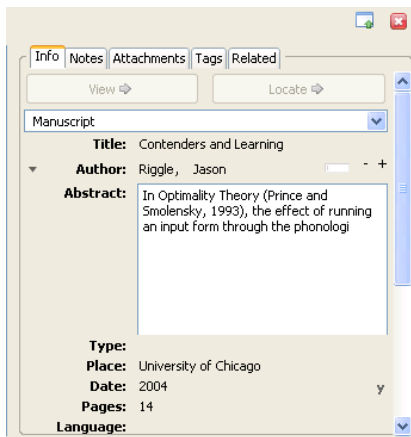
You can add citations to your library in four ways:

- Manually enter citation information
- Automatically cite web pages
- Import citation information for a single item
- Import citation information for multiple items

### Creating Citations Manually


To create a citation manually in your Zotero library:

1. Go to the **Middle Panel** and click on the New Item icon (  ) menu.
2. A pull-down menu will appear. Select the type of source you would like to cite. For more citations types, click on **More** and a full list of options will appear.
3. In the **Right Panel** you will see fields specific to the type of source you selected. Fill them in with the information for your item.





### Creating Citations from Web Pages

To import citations for web pages into your library:

1. In the **Middle Panel**, click on the Create New Item from the Current Page icon (  ). Information about the current webpage will automatically be pulled into your library.
2. Edit the information by clicking on each field in the **Right Panel**.

Zotero automatically saves the items that you import. This information, however, is saved only in your browser on your computer. When you cite a webpage, Zotero only pulls in the information available on the page – so if the author is not listed, you have to enter the name(s) manually.




You can also add a link or take a picture of your current page that will be entered in your library as a citation.

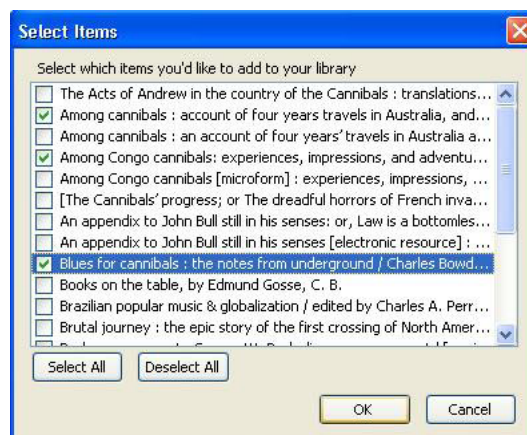
1. Click on the Save Link to Current Page icon (  ) in the **Middle Panel** to cite a link.
2. Click on the Take Snapshot of Current Page icon (  ) in the **Middle Panel** to save a picture.

### Importing Citations from Library Catalogs and Databases

Zotero is compatible with many databases and library catalogs, including New York Public Library, the New York Society Library, EBSCOhost, JSTOR, LexisNexis, OCLC FirstSearch, ProQuest, and PubMed. A full list of systems that Zotero supports can be found at the following URL: <http://www.zotero.org/translators/>

Once you have your search results within a database, you can import multiple citations at the same time or choose just one individual citation.

- If you are on a page with a list of results, a Folder icon (  ) will appear in your address bar. If you are looking at an individual record, a Book icon (  ) or Article icon (  ) will appear instead. Click on the displayed icon.
- If it is an individual record, it will immediately be added to your library.
- If it is a result list, a box will appear with a list of all of the records so you can check the items you would like to import. Click *OK* and your items will appear in your library.



## ENHANCING YOUR CITATIONS

### Editing Citations

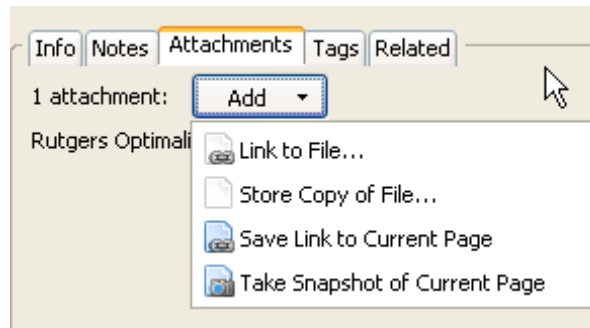
To edit information about items in your library:

1. Click on the citation you would like to change in the **Middle Panel**.
2. In the **Right Panel**, click on the field that you would like to change and type in the new information.

### Adding Attachments

You can attach files to individual citations in your library. This is useful when you have saved electronic versions (PDFs) of the articles that you are citing and would like to associate them with the corresponding citations. To add an attachment:

1. Select the citations to which you would like to attach your file in the **Middle Panel**.
2. Click on the *Attachments* tab in the **Right Panel** or the paper clip icon in the **Center Panel**.
3. Click on the *Add* button. A set of options will appear.
4. You can either attach a file by choosing **Link to File** or by choosing **Store Copy of File**. By linking to a file, you are creating a file path to the document stored on your computer. If you choose to store a copy of the file, the entire document will be saved within Firefox.



### Using Tags

Individual items can be tagged to facilitate searching and organizing. Items can have more than one tag. To add your own tag to a citation:

1. Select the citation you would like to tag in the **Middle Panel**.
2. Click on the *Tags* tab in the **Right Panel**, and then click on the *Add* button.
3. Name your tag in the field that appears. Your tag will then be attached to the selected reference and will appear as part of your tag list in the **Left Panel**. If you click on the tag in the tag list, all citations with this tag will appear in the **Middle Panel**.

### Create a note

To add a note to a citation:

1. Select the citation you would like to add a note to in the **Middle Panel**.
2. Click on the *Notes* tab in the **Right Panel**, then click on the *Add* button.

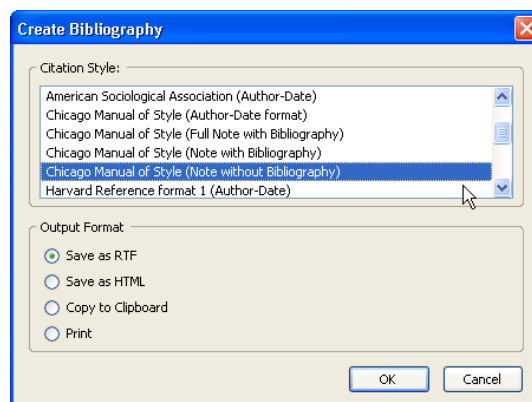
3. A dialog box will appear into which you can type your note. You can also add tags and related items to the citation you selected in this box by clicking on **Related** or **Tags** in the bottom of the frame.

To store a note independent of a citation in your library, click on the New Standalone Note icon (📝) in the **Middle Panel**. A box will appear in the **Right Panel** for you to enter your note. When you are finished, the note will be saved with your references and will be accessible from the **Middle Panel**. The default name is the first few lines of text in the note.

## CREATING A BIBLIOGRAPHY

To generate a bibliography:

1. Select the items you would like to include in your bibliography in the **Middle Panel**.
2. Once the items are highlighted, right-click on the selected items.
3. Choose **Create Bibliography from Selected Items**. A new dialog box will appear.
4. Choose the citation style you would like to use for your bibliography from the pull-down list.
5. Choose the format you would like to save your document in, (Rich Text Format (RTF) or HTML for a webpage). You can also choose to print the document.
6. Click **OK**.



To generate a bibliography for a collection in your Zotero library, right click on the collection in the **Left Panel** and select **Create Bibliography From Collection....** Follow steps 4-6 above.

You may also drag and drop a citation for a single item from your Zotero library into a document:

1. Click and hold on the item you wish to cite.
2. Drag your mouse to the document in your taskbar (Windows) or dock (Mac) to pull up the document.
3. Drag the item to the place in the document where you want the citation to appear and release the mouse button.

The citation style will appear in the Default Output Format specified in your Zotero preferences. To change the style, go to **Actions > Preferences > Export** and select a style from the pull-down.

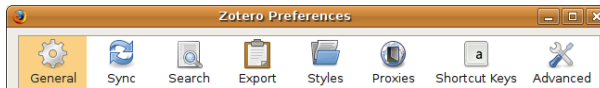


## ADVANCED FEATURES

### Syncing your Zotero Library

Data syncing transfers library items, notes, links, tags, etc.—everything except attachment files—between the Zotero Firefox extension and the Zotero servers, allowing you to work with your data from any computer with the Zotero extension and to view your library on [zotero.org](http://zotero.org).

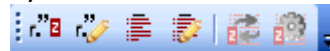
The first step to syncing your Zotero 2.0 library is to create a [zotero.org](http://zotero.org) account. If you already have a Zotero Forums account, you're all set. Otherwise, [create an account](#). Once you've done so, open Zotero's Sync and enter your login information in the Zotero Sync Server section.




By default, Zotero will sync your data with the server whenever any changes are made. Manual syncing can be enabled by unchecking the “Sync automatically” check box in this section. The first time your Zotero library syncs, Firefox may appear to hang, especially if you have a large library.

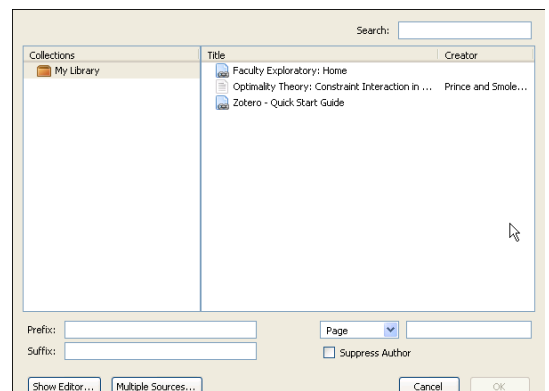
### In-text citations with Word

Zotero's plugin for Microsoft Word makes it easy to cite items from your Zotero library in Word documents. The plugin is available for both Mac OS X and Windows, and has been tested with various versions of Word. Further compatibility information and installation instructions are available online at [http://www.zotero.org/documentation/microsoft\\_word\\_integration](http://www.zotero.org/documentation/microsoft_word_integration). Once you have installed the plugin, new icons will appear in your Microsoft Word toolbar.



To add a new citation to your Word document:

1. Click the *Zotero Insert Citation* (  ) button.
2. If this is the first time you've added a citation to your current document, a Document Preferences dialog box will open. Choose the format you would like to use and click *OK*.
3. An Add Citation window will appear. Select the item you would like to cite in your document.
  - a. You can select multiple citations by clicking *Multiple Source* and adding sources to a list.
  - b. Add page numbers as well as prefixes and suffixes in the appropriate boxes at the bottom of the window.
4. To preview your citation, click on the *Show Editor...* button. The *Edit Citation* box will appear at the bottom of the Add Citation window.



5. Click *OK*. A properly formatting citation will now be in your document.

## **ADDITIONAL RESOURCES**

### **Zotero Support Pages**

One of the nice features of Zotero is the thorough supporting documentation, tutorials, and step-by-step instructions that are on their webpage: <http://www.zotero.org/support/>

### **More Online help**

<http://libguides.mit.edu/zotero>

[http://ets.tlt.psu.edu/wp-content/uploads/zotero\\_hot\\_team.pdf](http://ets.tlt.psu.edu/wp-content/uploads/zotero_hot_team.pdf)

### **Similar Online Citation Tools**

<http://www.bibme.org/>

<http://www.citeulike.org/>

### **Zotero Is NOT perfect**

Although Zotero tends to be accurate with citation styles, there are times when you will need to double-check your bibliography. Always do a visual scan of your bibliography and footnotes to ensure that they are properly formatted. When in doubt...

- MLA Style: <http://owl.english.purdue.edu/owl/resource/747/01/>
- Chicago Style: [http://www.chicagomanualofstyle.org/tools\\_citationguide.html](http://www.chicagomanualofstyle.org/tools_citationguide.html)
- APA Style: <http://owl.english.purdue.edu/owl/resource/560/01/>

**Thanks! Questions?**