

Using Zotero for Reference Management

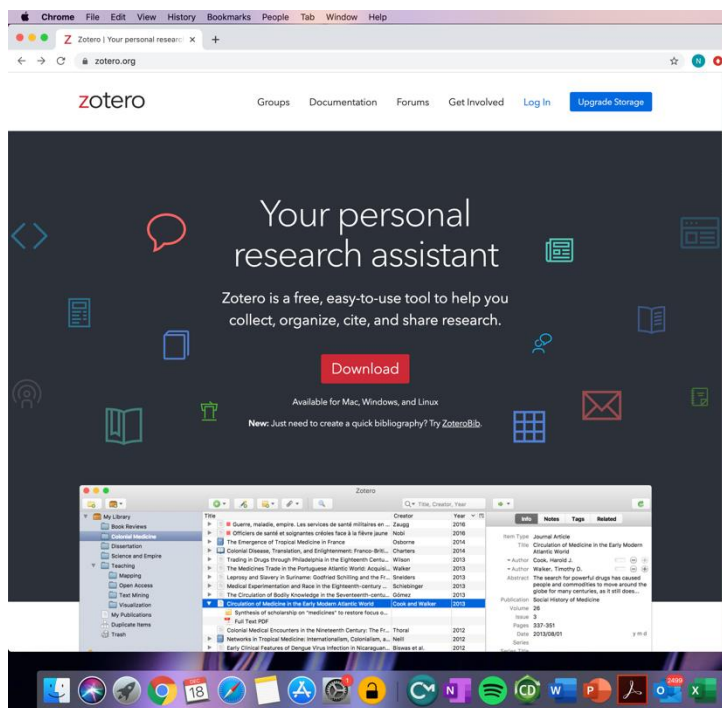
Overview: In modern scientific research, using software makes organizing and providing proper citations to literature sources easy and convenient. Many different types of commercial software packages exist for this purpose. Some of the more common software systems used by academics include papers (optimized for Mac) and endnote (what Dr. Boaz uses to write papers). Free software packages also exist for managing your reference library. In the document that follows we will download and explore the use of Mendeley (Developed by Elsevier-PC compatible*) and Zotero (Open Source-PC, Linux, and Mac compatible) to both organize your references and cite them when writing.

*Mendeley is currently a 32-bit application meaning that macOS's newer than 10.14 (Mojave) are incompatible with this software. If you are running a macOS newer than 10.14 or Linux as your operating system you should use Zotero.

Zotero

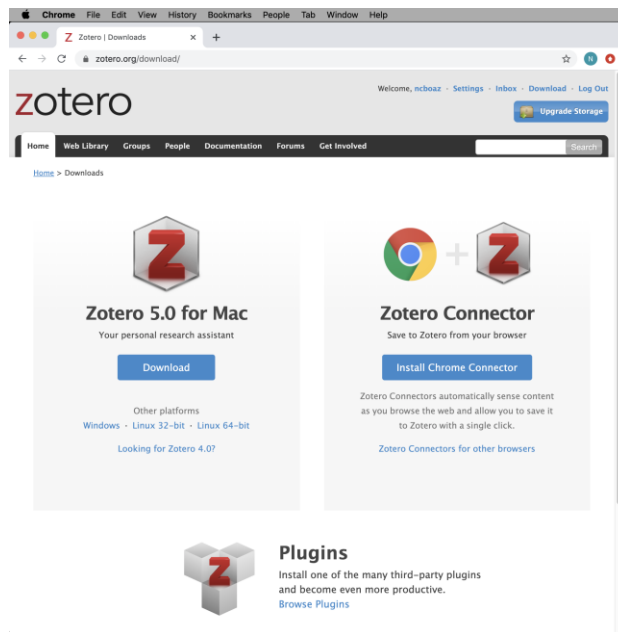
Downloading and Installing Zotero:

1. Go to Zotero.org and click on download (big red button shown in the figure below).

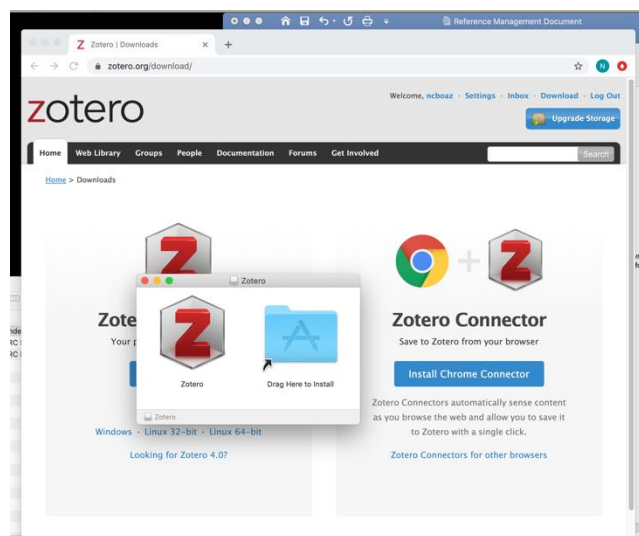


2. Clicking on the red button will bring you to another screen giving you options for downloading the software appropriate for your operating system. Download the software appropriate for your computer.

Using Zotero for Reference Management

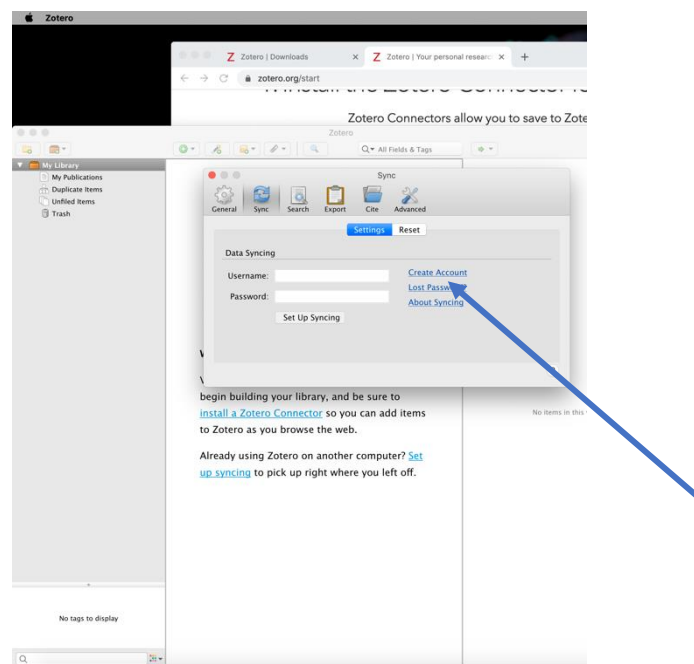
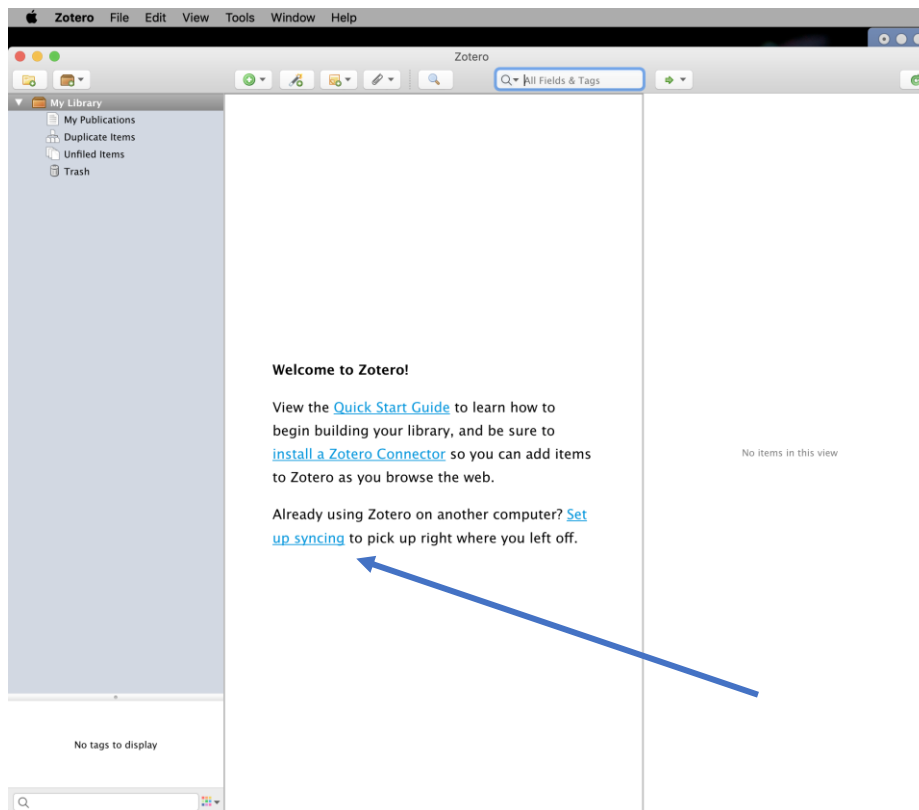


3. After clicking download, please follow the prompts to install the software onto your computer. (Screen shown for a Macintosh computer running 10.14.6 (Mojave)).



4. The first time that you open Zotero on your desktop you will be prompted to sign into Zotero so that all of the papers that you saved are available to you regardless of computer that you are logged-in from. If you are not prompted to create an account, click on “set up syncing” which will open a secondary window where you can create an account with Zotero.

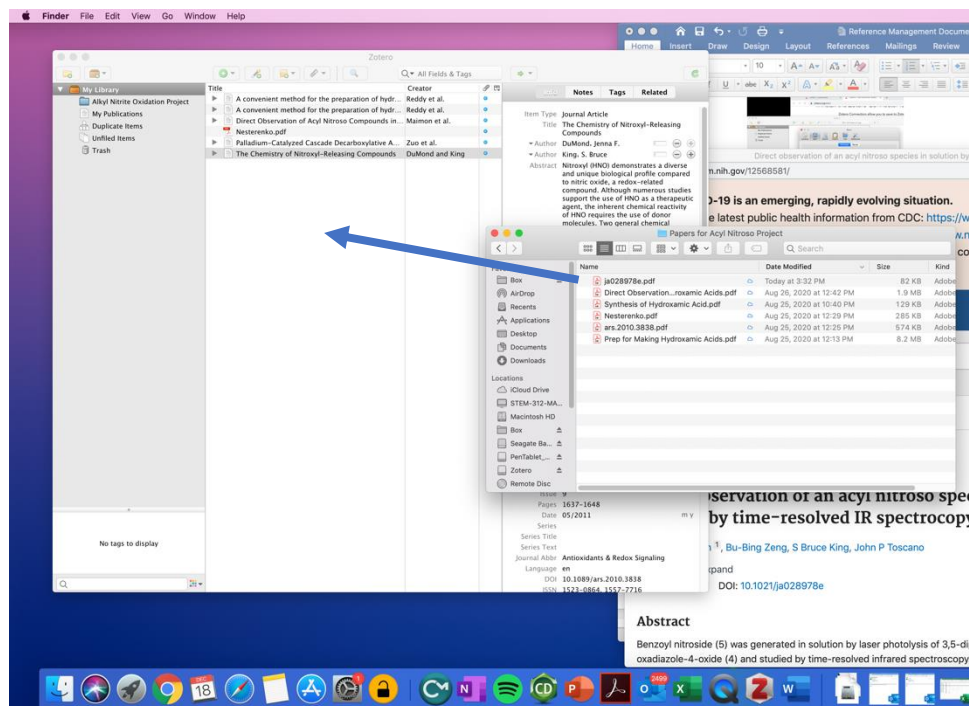
Using Zotero for Reference Management



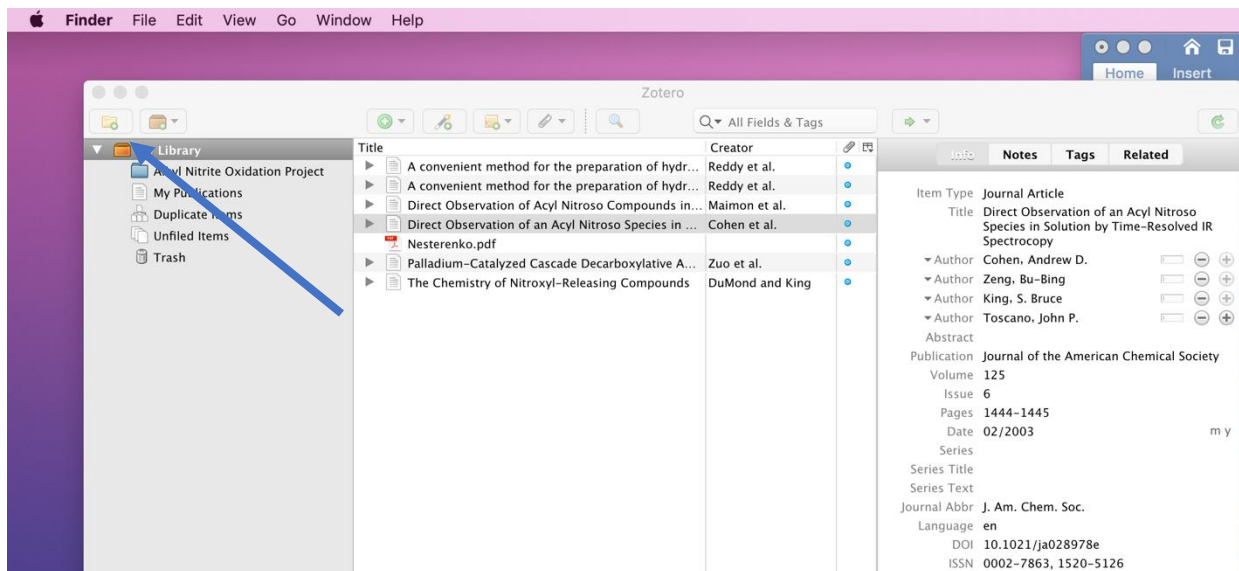
Using Zotero-General

Using Zotero for Reference Management

1. To load a journal article into the Zotero Software package first download the reference (usually as a pdf) onto your computer. After you have downloaded this reference you can load this paper into Zotero by simply dragging the reference into the center window. This will extract all of the bibliographic information from the PDF and have it ready for when you need to cite the paper.

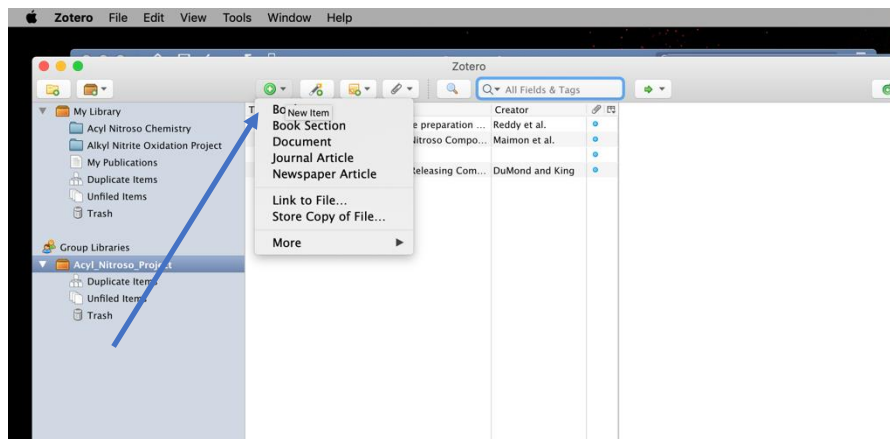


2. Clicking on any reference will bring up the original paper so that you can read it.
3. It is often useful to organize your collection of references by project. To do this click on the button with the manilla envelope with a green plus at the top left of the window (shown with a blue arrow). This will bring up a window where you can name a new collection.



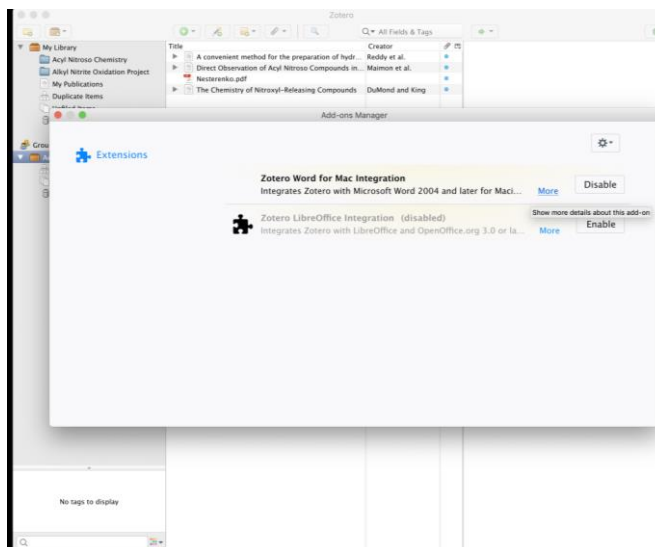
Using Zotero for Reference Management

4. To add a reference to a specific collection, click and hold on a specific reference and drag to the desired collection folder and release your mouse. This reference will now be available in this specific collection folder in addition to the complete My Library folder.
5. Sometimes you will need to add a reference manually for physical items such as books or periodicals (you know the paper things that your professors had to haul to school in the snow 15 miles each way when they were your age). To do this click on the green plus button in the center-left of the Zotero window (shown below). This will open a box allowing you to create a manual entry.



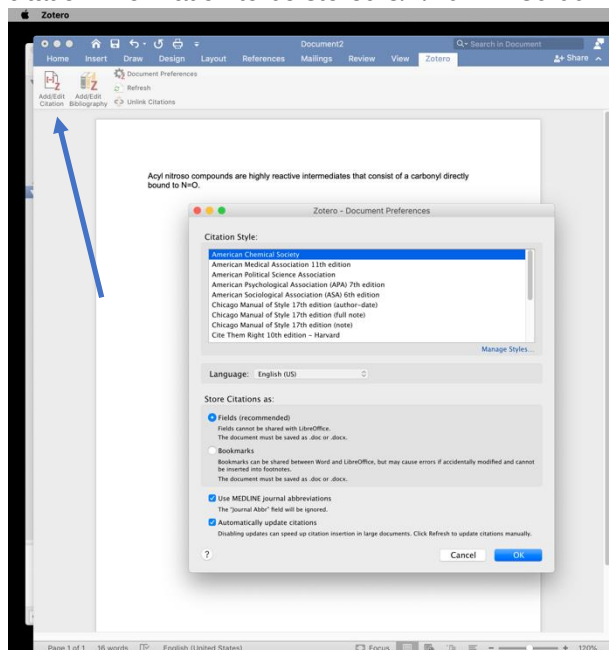
Citing References While Writing with Zotero

1. When you initially install Zotero a plugin for Microsoft Word is typically also installed. To check on this installation please click Tools→Add-ons. This will bring up a window (shown below) indicating the add-ons installed. If an add-on to Microsoft Word is disabled, enable it by clicking on the enable button.

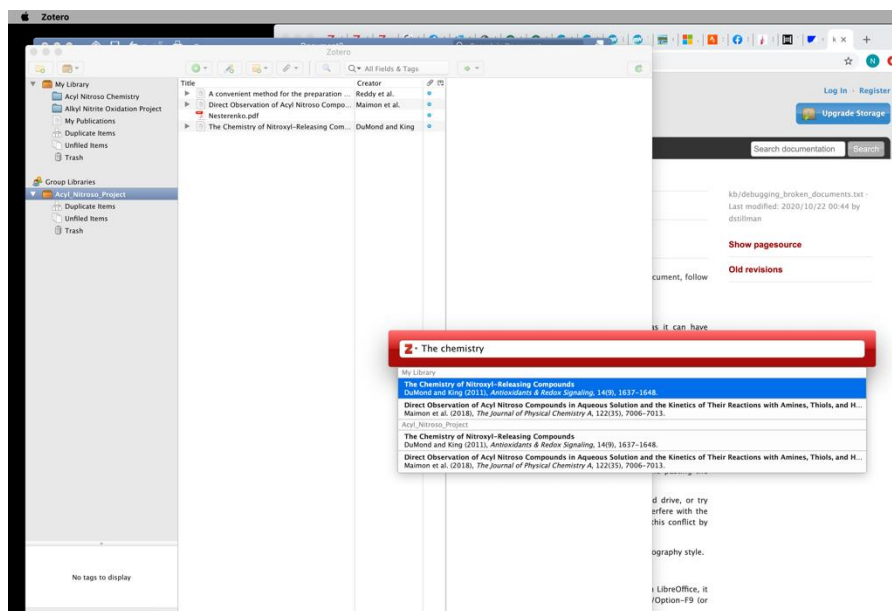


Using Zotero for Reference Management

2. In Microsoft Word under the main set of tabs at the top of the screen there should be a tab that says Zotero. Click on this tab to access your citation options.
3. When you come across a sentence (or group of sentences) that need to have a citation inserted click on the Add/Edit Citation button on the top left of the screen. This will bring up a selection box that will allow you specify your preferred style of citation and how you want your citation information to be stored.5/7/2021 1:39:00 PM

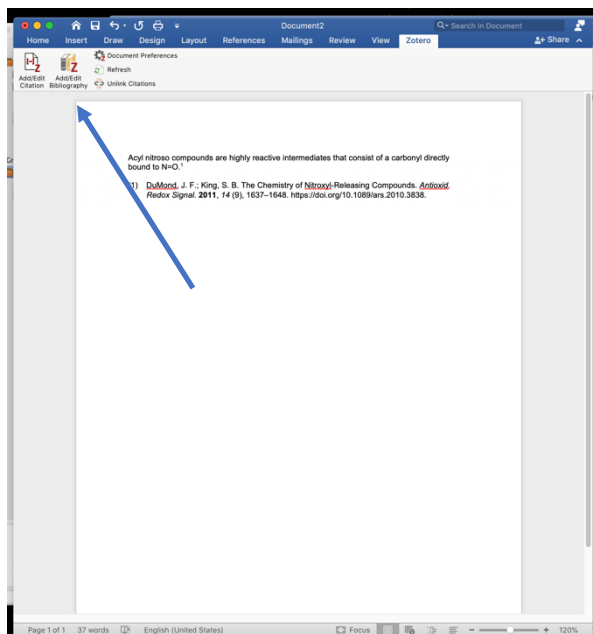


4. After specifying your style of citation hit ok to bring up a screen that will allow for you to search for your citation within your Zotero library. To search for a citation, type a title or author into the search bar. Select the title(s) you want to cite. To insert the citation hit enter (return). This will return you to your word document with the citation(s) inserted.



Using Zotero for Reference Management

- When you have finished citing your paper, or when you want to format your bibliography place your cursor at the end of the document (or where you want to place your bibliography) and hit the Add/Edit Bibliography button at the top left of the window (still under the Zotero tab). This will add your bibliography in the style that you originally selected for your in-text citation.

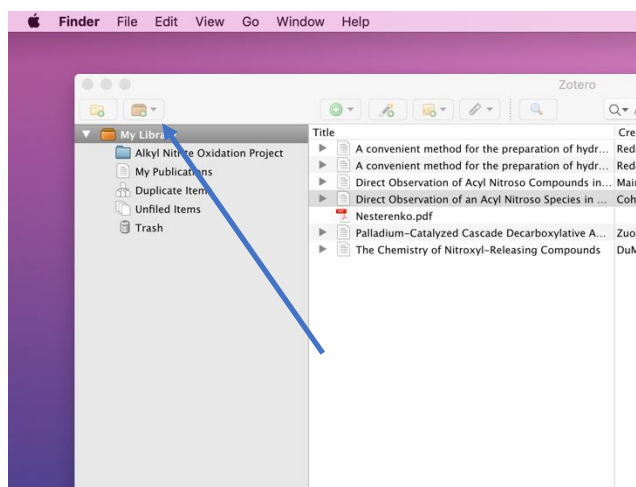


- If at any point you would like to change the citation style of your document, press the document preferences button which will load a window allowing you to change the citation style and format of your paper.

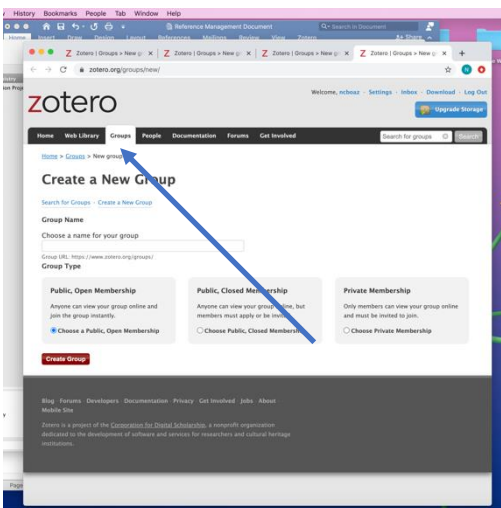
Sharing Research with Other People-Groups

- Many times, you may want to share a selection of research with a colleague with whom you are working on a research project. To do this you will need to select the button immediately to the right of the add collection button (This button is a box with a green plus sign, indicated with a blue arrow in the figure below). After clicking this button select add group. This will open a new window where you can create a group with which to share research. From here you can name your group and select how widely you would like to share the material.

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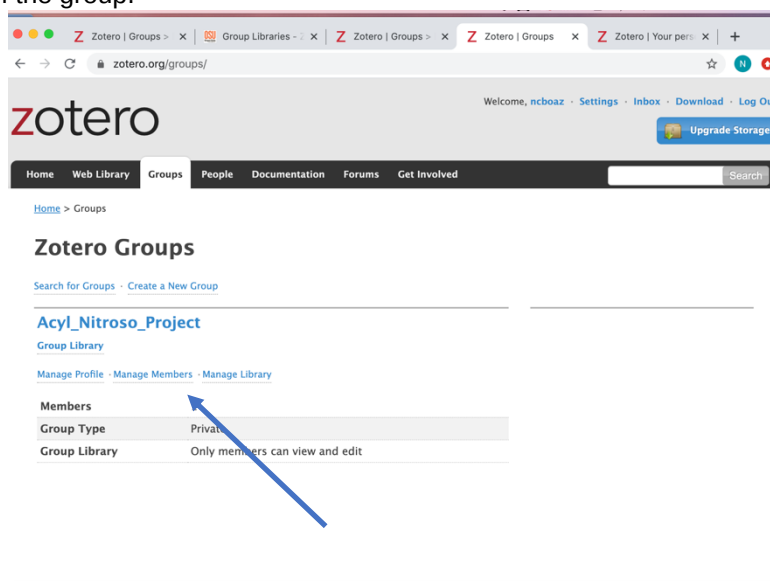


2. For example, I (Dr. Boaz) created a group for a project on the use of a compound known as acyl nitroso species. A new group libraries folder will now show up on your main Zotero window after you sync your desktop Zotero to Zotero web (green curly arrow at the top right). Dragging references into this group will allow everyone to access these references and use them in your project.



Using Zotero for Reference Management

- Managing your group needs to be done from the Zotero website. After logging in to Zotero.com you can click groups which will bring up the groups that you are a part of. This window is shown below. Clicking on manage members will allow you to add or subtract people from the group.



- When you invite a person to the group an email will be sent inviting them to join the group (and Zotero if they are not already a member)
- Shared (group) libraries will then be available from the desktop app underneath the local (personal) libraries (shown with a blue arrow in the figure below).

