

# Zotero Workshop

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## I. WHAT'S ZOTERO ?

**Zotero** [Zoh-TAIR-oh] is a free, easy-to-use tool to help you **collect, organize, cite, and share** your research sources. It lives right where you do your work—in the **web browser** itself.

Zotero is a US project of the Roy Rosenzweig Center for History and New Media. It is funded by the Andrew W. Mellon Foundation, the Institute of Museum and Library Services, and the Alfred P. Sloan Foundation.

In addition to item metadata, notes, and tags, Zotero can also be used for managing files. Files can be added to your Zotero library as either copies or links. With copies, **a copy of the original file is stored in the Zotero data directory. Zotero allows you to store files up to 100 Mb for free. HEC library and IT service then provide an online secure server for you to store more files.** The library may help you to set your preferences.

## II. INSTALLING ZOTERO

To install Zotero, go to [Zotero.org](https://www.zotero.org) with Firefox and click the red “Download Now” button.

There are two versions of Zotero : **Zotero for Firefox** and **Zotero Standalone**.

We advise you to use **Zotero for Firefox** as it enables you to use an **institutional proxy** to access the **library’s electronic resources**: The first time you are using an institutional proxy to access a particular site, Zotero will detect it and ask if you want to remember it in the future. If you agree, Zotero will automatically use the proxy for matching URLs in the future. You should be routed through the proxy login site if you're not already logged in, then you can access the database as you normally would.

### Option 1 : Zotero for Firefox :



It’s an extension for the Firefox web-browser. It runs in its own window within Firefox, separately from web pages.

1. Click the “[Zotero 4.0. for Firefox](#)” link. Click the “Allow” button in the top right, then “Install”. Don’t restart yet.
2. Click “[Zotero Word processor plugins.](#)” Click “Allow”, “Install”, and restart Firefox when prompted.
3. In the upper right corner of your Firefox window you’ll see a Z button. Click it to view or hide your “library” of saved citations. Zotero continues to run when Firefox is open, whether or not you are viewing your library.

### Option 2 : Zotero Standalone :



This version works with Google Chrome and Safari\*.

1. Download and install “Zotero Standalone” for your operating system (double-click the downloaded file).
2. Click the “Zotero Connector” link for your browser (Chrome or Safari). Click “Continue” and “Install” (Chrome) or “Open” and “Install” (Safari).
3. You’ll see a Zotero icon on your desktop. Open it to run Zotero.



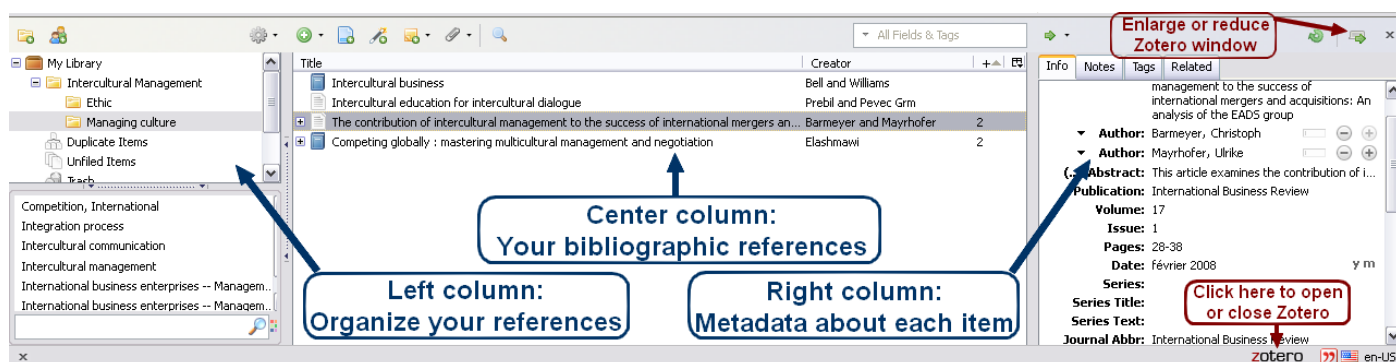
NB : Word processor plugins for Word and LibreOffice/OpenOffice are bundled with standalone Zotero.

\* To use Zotero Standalone with Firefox, install Zotero 4.0 for Firefox. It will automatically switch into connector mode when Zotero Standalone is opened.

Zotero for Firefox and Zotero Standalone work the same. You can install both versions on the same computer.

### III. PRESENTATION

Zotero is divided into three columns : **Items** (bibliographic references) appear in the center column. The **metadata** for that item is in the right column. This includes titles, authors , publishers, dates, and any other data needed to cite the item. The left column includes “My Library”, which contains all items. This column allows you to **organize** your references, by creating collections, sub-collections, etc.



### IV. SAVING CITATIONS

#### 1. A single click to save bibliographic information

Whenever Zotero recognizes a source on a web page you view, it will display a “save icon” in the address bar of your Firefox browser :



The icon changes, depending on the type of source Zotero detects (article , book , thesis , etc.)

#### a) Example 1 : Google Scholar, Amazon, Worldcat, Sudoc, Library of Congress...

When you’re looking at a record for a book reference in an online library catalog (Sudoc, Worldcat, Library of Congress, etc.), you’ll often find a book icon in the address bar of your browser. When you click on this book icon, Zotero will save all of the bibliographic information about that book to your library, in a newly created “book” item :



- Go to Amazon.com
- Type you keywords
- Click any book
- Click the book icon to save its bibliographic information

This process is the same for a library catalog, an academic database, a newspaper or blog... You may save information about all kinds of documents (books, articles, videos, thesis...)

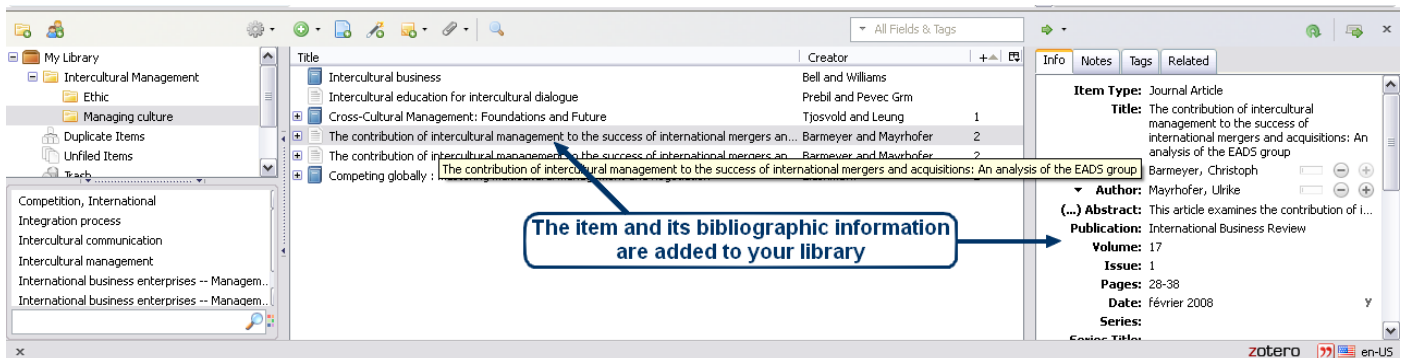
#### b) Example 2 – Databases : Business Source Complete, JSTOR, ScienceDirect...

When you find an article on one of the library databases (i.e. Business Source Complete, JSTOR, ScienceDirect...), and you want to save its bibliographic information, you just need to click the “Article” icon.



Zotero will save all of the bibliographic information about that article into your library.


- Go to Business Source Complete – advanced search
- Type your keywords
- Select any article
- Click the “article” icon to save it into your Zotero. It will save a snapshot of the page. It will also save the PDF of the article, if it is available.



### Tips about attached PDFs:

- You can set your preferences so that Zotero will automatically save article PDFs: simply check “Automatically attach associated PDFs and other files when saving items” in your preferences.
- Article PDFs saved from databases often have cryptic filenames: right-click it and select “rename file from parent metadata”. You will then be able to recognize your attachments easily.
- If you sync your library, these PDFs will take up storage space in your server quota. You can disable attachment syncing in your preferences, in the sync tab.
- Right-clicking any stored attachment in the library allows you to view it or to open the folder on your hard drive that contains the attachment.

## 2. Saving multiple citations at once

When Zotero detects one or more sources on a web page you’re visiting, it shows a folder icon . When you click the folder, it will display a dialog box, asking you to choose which items you wish to save.

### Example : Bernard Garrette publications

- Create a “Bernard Garrette” folder in your Zotero.
- Select “Bernard Garrette” folder.
- Go to the multi-source searcher
- Type Bernard Garrette and select “author”.
- 34 results
- Click the folder icon and select the relevant documents
- Save it to your Zotero in your Garrette folder

## 3. How to edit its bibliographic information

You can **view and edit** its bibliographic information via the Info tab of the right column. Most fields can be clicked and edited. **Changes are saved automatically** as they are made.

Some fields have **special features**.

**Example :**

#### a) Names

Each item can have zero or more creators, of different types, such as authors, editors, etc. Zotero automatically imports those metadata from the catalog or database. You can make some changes, though.

- To change the creator type, click the creator field label (e.g., “Author:”).
- A creator can be deleted by clicking the minus button at the end of the creator field, and additional creator fields can be added by clicking the plus button at the end of the last creator field.
- Creators can be reordered by clicking a creator field label and selecting “Move Up” or “Move Down”.
- Each name field can be toggled between single and two field mode by clicking the “Switch to single field” / “Switch to two fields” buttons at the end of the creator field. Single field mode should be used for institutions (e.g., when the author is “Company A”), while two field mode (last name, first name) should be used for personal names.

#### b) Journal Abbreviations

Journal articles are often cited with the abbreviated journal title. Zotero stores the journal title and journal title abbreviation in separate fields (“Publication” and “Journal Abbr”, respectively). We recommend that you store title abbreviations in your Zotero library with full stops. Zotero can then reliably strip out the full stops in rendered bibliographies when the chosen citation style calls for it.

#### c) Titles

In English, titles are typically either Title Cased or Sentence cased. We recommend that you store titles in your Zotero library in **sentence case**. Zotero can then reliably convert titles to Title Case in rendered bibliographies when the chosen citation style calls for it.

To help with changing the case of titles, the title fields (e.g., “Title”, “Publication”, “Series Title”, “Short Title” for the “Journal Article” item type) can be right-clicked. This shows the “**Transform Text**” menu, with options to **convert** the title to either “Title Case” or “Sentence case”. Zotero does not recognize proper nouns, and transformed titles should always be checked for capitalization errors.

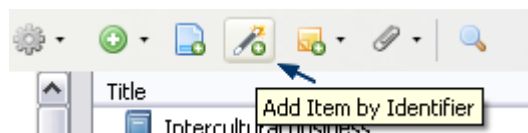
#### d) Links

Clicking the label of the URL (“URL:”) and DOI (“DOI:”) fields will open up the (DOI-resolved) URL in your web browser.

### 4. Add item by identifier (ISBN, DOI, PubMed ID)

You can quickly add items to your library if you already know their ISBN, Digital Object Identifier (DOI), or PubMed ID. To add an item via one of these identifiers, click the “Add Item by Identifier” button, type or paste in the identifier and press Enter.

- Go to the Library catalog.
- Search for a monograph.
- Copy the ISBN
- Click the “Add item by identifier button”



- Paste the ISBN
- Edit fields and add the abstract (copy/paste)

## 5. Save web pages

With Zotero with Firefox, you can create an item from the current web page :

There are two ways to save that web page:

- a) Click the “Create new item from current page” button



- b) Or right-click the web page and select “Create new item from current page” in the “Zotero” menu. (in Zotero Standalone, right-click the page and select “Save Zotero snapshot from Current Page”.

Further options :

- Right-click it to view it : online or off-line (“view snapshot”)
- To view it online, you can also double-click the item, or click the “URL” title.


A snapshot is a copy of the page saved to your computer. It includes the page's text and images, so if the page is removed later, or if you're offline, you'll still be able to view your copy.

- When you view a snapshot, there's a specific toolbar on the left corner of the page. You can annotate the snapshot, or highlight text.

If a part of the web page interests you :

- Select the text
- Right-click it and select “create item and note from selection”

## 6. Manually adding items

To manually add an item to your Zotero library, click the green “New item” button  at the top of the center column, and select the desired item type from the drop-down menu.

An empty item of the selected item type will now appear in the center column. You can then manually enter the item's bibliographic information via the right column.

## 7. Adding PDFs and other files (pictures, etc.)

To include a PDF or any other file (picture...) from your computer to Zotero, simply drag it to Zotero – you can drag to an existing item to attach the file or drag between items to store as an independent item.

For PDFs that you have added as independent items, you can try to automatically download bibliographic data from the internet by right-clicking them and selecting “Retrieve Metadata for PDF”.

If the document is indexed in Google Scholar, its bibliographic information is added automatically. If not, you'll need to add information manually.


## V. ORGANIZING YOUR REFERENCES

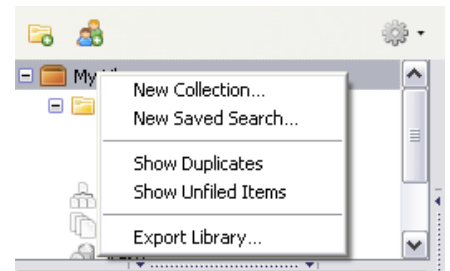
Zotero allows you to organize your items in collections, to add notes, tags, to attach files...

### 1. Collections / Sub-collections

Collections are more like iTunes playlists than physical folders in a filing cabinet. Items can be assigned to multiple collections. To see all the collections an item is in, select the item and then the Option (OS X), Control (Windows), or Alt key (Linux). This highlights all the collections that contain the item. Items that are not in any collection can be found in the “Unfiled Items” folder.

To create a collection:

- click the “new collection” button , or right-click on “My library” and choose “New collection”.
- Name it
- To add items to a collection, select them in the center column and drag and drop them onto a collection. New items are automatically saved into the selected collection.
- When you right-click on a collection, you may “Add sub-collection”, “rename collection”, “delete collection”, etc.



### 2. Notes

You can store notes in your Zotero library: child notes, which belong to a specific item, and standalone notes that are not directly related to any item in your library, but will appear alongside any other items. To add a note:

- 1) Select an item.
- 2) Click the « Add Note » button and select the type of note you wish to add.
- 3) Type your note (ex: reread 2<sup>nd</sup> paragraph). It will be attached to your item. When you search in your zotero library, zotero will also search within your notes.



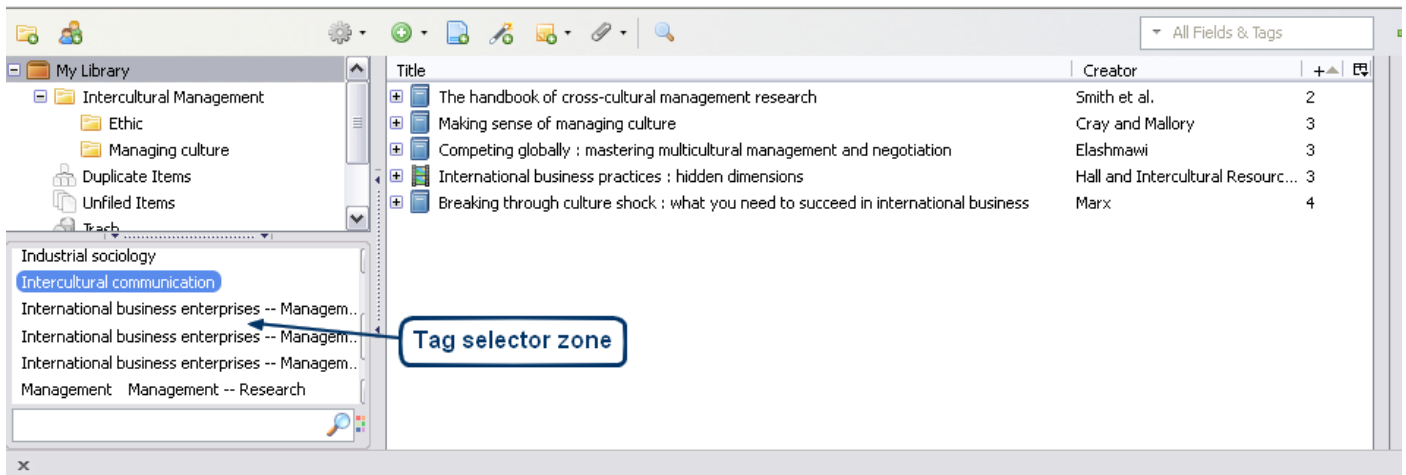
You can also create a note from a web page :

- 1) Click the “Add note” button
- 2) Select the text on your web page.
- 3) Right-click and select “Add Selection to Zotero Note” in Zotero menu.

### 3. Tags

The **Tag selector zone** shows all the tags that have been attached to the items shown in the center column:

- Select one or multiple tags: only those items carrying the selected tags are shown in the center column.
- Clicking a selected tag again will deselect it.



- To assign a tag to multiple items at once, drag a selection of items from the center column onto a tag in the tag selector.
- Click an item in the center column: the list of tags assigned are visible on the right column.
- You can manually add or delete tags:
  - click "tags"
  - click "add"
  - start typing a tag (ex : political aspects") and select the desired tag; click "add" or "enter"
  - Or create a tag : type the new tag; click "add"
  - Click "minus" to remove it.



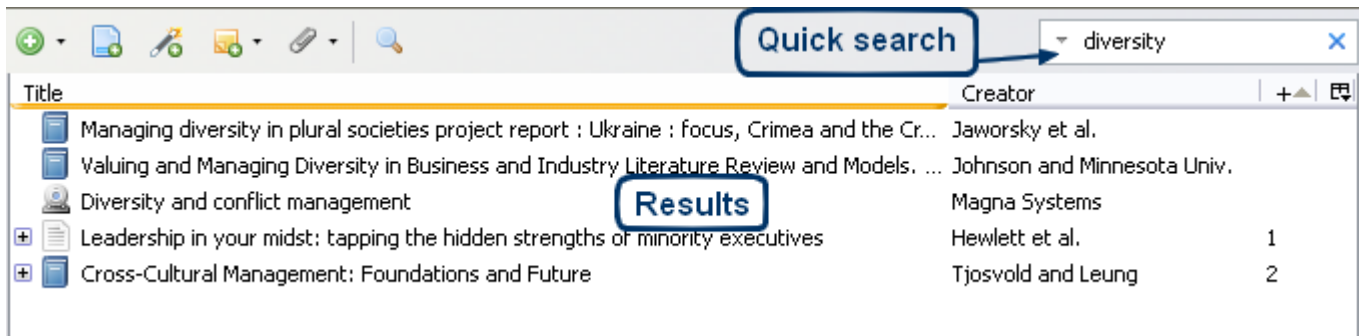
When items are saved to a Zotero library via a web translator, tags are sometimes automatically attached. You can change your preferences to prevent Zotero from adding automatic tags.



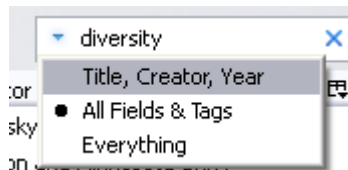
## VI. SEARCHING INTO YOUR LIBRARY

### 1. Quick search

As you type, only those items in the center column that match the search terms will remain.



3 different modes :

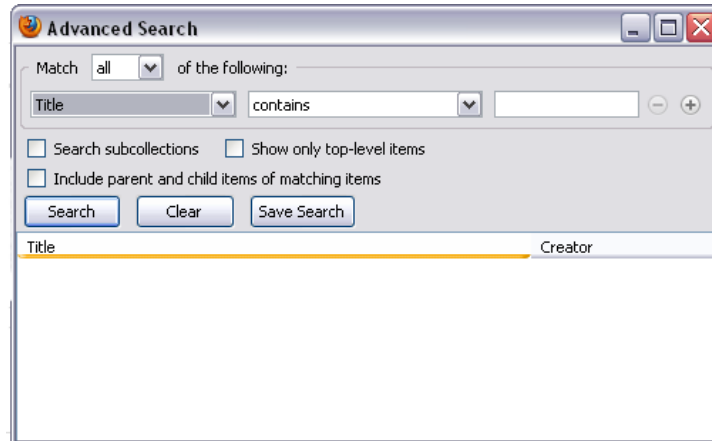


### 2. Advanced search

Click on the magnifying glass icon.



It opens the Advanced Search window in which you can filter items by the content of specific fields or by other properties, like item type or the collection an item belongs to. Multiple filters can be set up by clicking the plus button.



## VII. SYNC YOUR LIBRARY

If you're regularly using more than one computer in your research, Zotero's sync feature can keep your library up to date on all of them. Zotero stores a copy of your library on the Zotero.org server and check it for updates whenever you open your library on a different computer. All your computers must be running the same version of Zotero and be configured to sync to the server.

- 1) First, set up a Zotero.org user account at [zotero.org/user/register](https://zotero.org/user/register).
- 2) Open Zotero preferences (via the gear menu > preferences) and select the Sync tab.
- 3) Enter your user name and password.

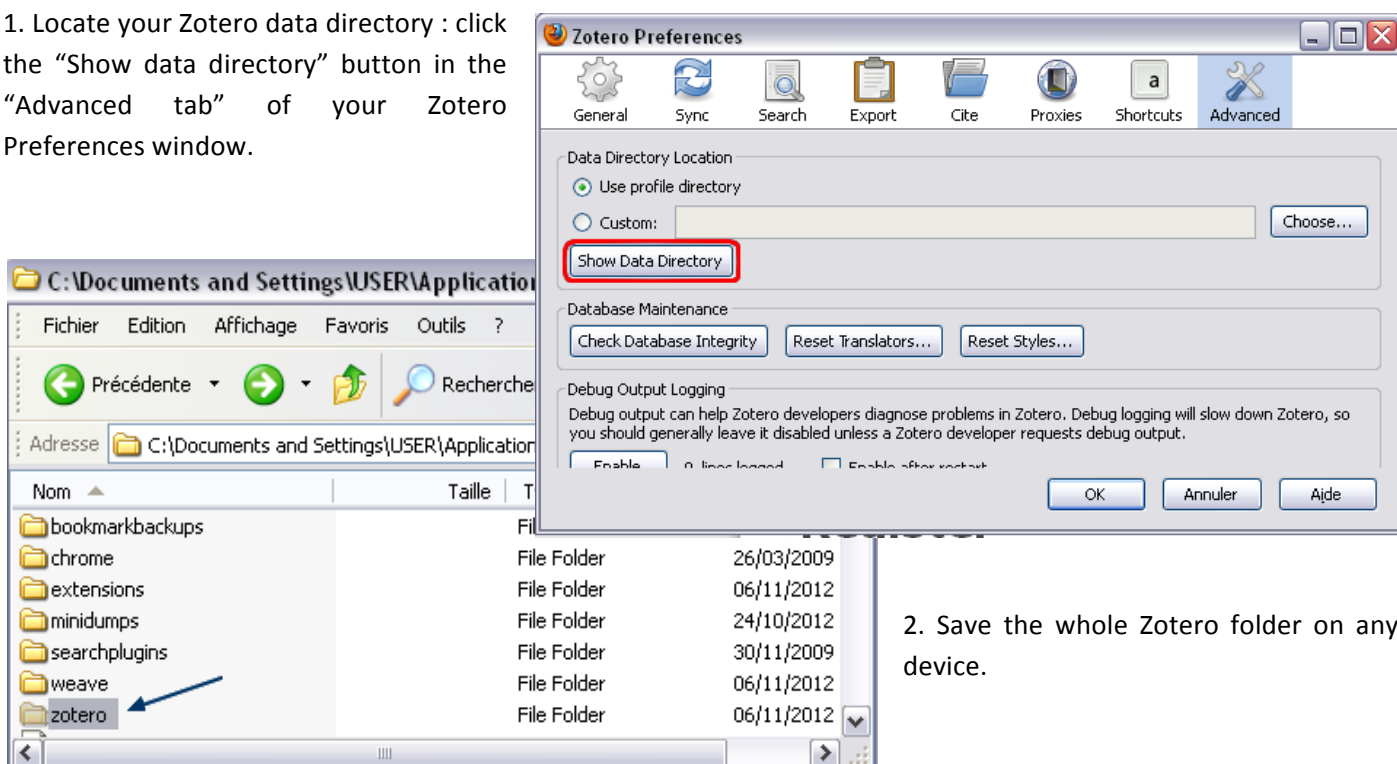
- 4) Check the "sync automatically" box. Zotero will upload your library to the server.
- 5) Show the "sync" icon on the right column

## VIII. BACKING UP

It is strongly recommended that you regularly back up your Zotero library. Syncing is not a good substitute for backing up: the Zotero server only stores the most recent version of your library, and it takes just a single (automatic) sync to change the server copy.

Warning : Before you copy, delete or move any of these files, be sure that Firefox and/or Zotero Standalone are closed. Failure to do so before moving these files can damage your data.

1. Locate your Zotero data directory : click the "Show data directory" button in the "Advanced tab" of your Zotero Preferences window.



2. Save the whole Zotero folder on any device.

Warning : Zotero allows you to export your Zotero library as a Zotero RDF file. However, exporting and importing your library via RDF won't result in an exact copy of your library, and it isn't recommended as a backup strategy.

For step-by-step, illustrated backup instructions, see [this guide](#) provided by the Northwestern University library.

Further details on [Zotero documentation](#)

## IX. ZOTERO GROUPS

Zotero's Groups feature allows you to share references with other Zotero users. It's a good way to work on collaborative research projects.

1) First, set up Zotero sync and synchronize your library.

2) To create a shared library, click the Create Groups button  near the top left of your Zotero window. You will be directed to Zotero website, on “Groups” page.

3) Log in to the Zotero website to create or join a group.

- To join an existing Zotero library, search for it at [zotero.org/groups](http://zotero.org/groups) or be invited by the group’s owner.
- To create a group, choose your group’s name and type. Groups may be public (searchable, and anyone can join) or private (users can only join if invited).

You now have two sections in your Zotero collections pane: My Library and Group Libraries.

Personal and group libraries are entirely separate, and changes made to items in one library do not affect the other. You can drag items back and forth libraries to copy items.

## X. CREATING BIBLIOGRAPHIES

### 1. Quick copy

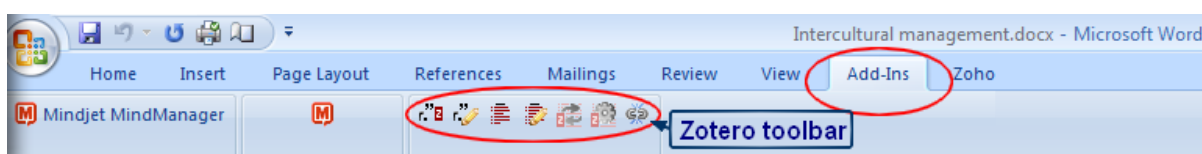
- Select an item
- Drag and drop it into your word document

### 2. Right-Click to Create Bibliography

- Select several item
- right-click it and select “Create bibliography from selected item”
- choose the style
- copy to clipboard
- paste into your document

### 3. From your Word document

When you installed a Zotero Word processor plugin, it added a Zotero toolbar to your word processor. You can find it under “Add-Ins”.



#### a) To insert a citation :


1. Place your cursor in your Word file exactly where you want the citation to appear.

2. Click “Zotero insert citation” icon .

NB : When you click this button for the first time in a new document, the « Document Preferences » window opens first. It lets you set the document-specific preferences.


3. Start typing part of a title, the last names of one or more authors, and/or a year in the dialog box. Matching items will instantly appear below the dialog box:

4. Select the reference you want to cite and click OK. Zotero will add the citation at your cursor.


5. If you want to customize a citation, i.e. you want to cite a certain part of your item, or you want to add a prefix, etc., click the “Edit citation” button .


6. Add “see also” in the prefix.

### b) Inserting and editing your bibliography

At the end of your paper, click the third button  (“Insert Bibliography”). Your bibliography will appear, and new citations will be added automatically.

By default, the bibliography is filled with all the items you have cited in the document.

Clicking the “Zotero Edit Bibliography” button (  ) to add additional items to the bibliography that you haven't cited, or remove cited items from the bibliography. You can revert these edits using the “Revert All” button.

Change bibliographic styles with the last button  on the toolbar (“Set Doc Prefs”).

You can change here “display citations by footnotes or endnotes”.

## XI. CITATION STYLES

### 1. Install additional styles: Zotero Style Repository

Zotero ships with several popular citation styles for creating citations and bibliographies, and over 2750 additional styles can be found in the [Zotero Style Repository](#).

If you can't find the style you're looking for in the Zotero Style Repository, feel free to [request a style](#). You can also try to create the style yourself.

**a) With Zotero for Firefox**, installing a style from the [Zotero Style Repository](#) is as easy as clicking on the style title:

- 1) Open Zotero preferences (via the gear menu) and select the “Cite” tab.
- 2) Click the “Styles” button
- 3) Click the link “Get Additional Styles...”
- 4) Choose the desired style title. It will be automatically added to your Zotero.

**b) With Zotero Standalone**, you first have to download the style to your computer.

1. Right-click the style title and select “Save Link as...” to download the style.
2. Double-click the downloaded file while Zotero Standalone is running to install it, or use one of the alternative installation methods described [here](#).

NB: The repository allows you to search by style name, and filter by style type and academic field of study.

### 2. Import styles from EndNote

Zotero can import a few EndNote styles, which are available to download even if you don't own EndNote.

1. Search the list at [endnote.com/support/enstyles.asp](http://endnote.com/support/enstyles.asp) and save the.ENS (EndNote Style) file.
2. Open Zotero's preferences. Click the Cite tab, then the Styles tab.

3. Click the plus (+) button below the list of installed styles.
4. Set the file type to “EndNote Styles” and browse to where you saved the.ENSfile.

### 3. Check the Zotero forums / make a request

Another option is to check the Zotero forums to see if someone else has already requested the style you need. If not, post a request.

### 4. Create or edit a style

**Before creating a style, please come to the library, we can find a solution for you.**

Zotero uses Citation Style Language (CSL) styles.

#### a) Choose a style

If you want to improve an existing CSL style, make sure that you start from the most recent version (the repository shows the date and time each style was last updated).

If you want to create a new style, find the style that most closely matches what you need using the previews in the style repository (check “Show only unique styles” to avoid seeing duplicates).

#### b) Edit the Style

- a) Download the style you want to edit to your computer
- b) Open it in a (plain) text editor like Notepad on Windows, TextEdit on Mac OS X (select “Make Plain Text” under “Format”), or gedit in Linux. See [Zotero step-by-step](#) guide for more options.
- c) Paste the style code into the Zotero Reference Test pane, so you instantly see the effect of code changes on the style output. If you make your edits directly in the test pane, save your edits often via your text editor, as changes in the test pane get easily lost.

See the [documentation page](#) of the CSL project website for information on making CSL changes (in particular, make sure to take a look at the [CSL specification](#). Click [here](#) to see a few common and simple style edits to get you started.

- d) Before installing your edited style, change the title and ID of your style if you don't want your modified style to overwrite the original style.

The style title and ID are stored within the <title/> and <id/> elements near the top of the style.

Example:

```
<title>Harvard Reference format 1 (Author-Date)</title>  
<id>http://www.zotero.org/styles/harvard1</id>
```

Can be changed to:

```
<title>Harvard Reference format 1 (Author-Date)</title>  
<id>http://www.zotero.org/styles/harvard1</id>
```

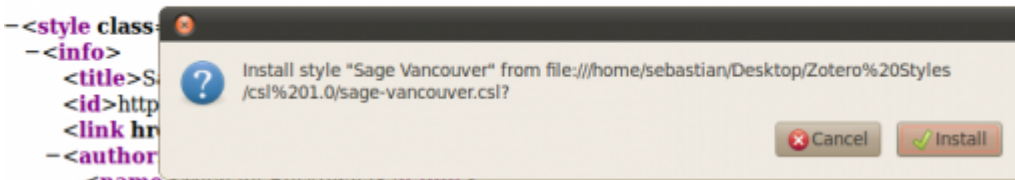
- e) Before installing a modified style, always make sure it is valid XML and CSL by [validating against the CSL schema](#).

### c) Install your edited style

#### Zotero for Firefox

- Save the style with a ".csl" file extension (you can generally do this by simply typing ".csl" after the name of your file)
- Drag-and-drop the CSL style file onto an open Firefox browser window
- Click the "Install" button (you can ignore the grey bar at the top of the window ("This XML style does not appear...")).

This XML file does not appear to have any style information associated with it. The document tree is shown below.



#### Zotero Standalone

- Save the style with a ".csl" file extension (you can generally do this by simply typing ".csl" after the name of your file).
- Go to the "[Cite](#)" tab in the Zotero [preferences](#).
- Click on the + sign below the list of installed styles.
- In the file selection dialogue that opens, navigate to the .csl file you just created and open it. This will install your new style.

## XII. HOW DO I IMPORT RECORDS FROM ENDNOTE® ?

Many people coming to Zotero already have extensive collections stored in other reference management software. The following information describes how to make the move from EndNote® to Zotero, but the same basic steps apply to many other reference management systems.

### 1. Exporting your EndNote® Library

Follow these steps to export your library :

1. In your Style drop down list, select "RefMan RIS". If you don't see it listed, choose "Select Another Style", then find "RefMan RIS" in the list.
2. Highlight all the items in your library.
3. Select File, Export.
4. Choose a name and location for your exported file. Make sure the type of file is "Text Only".
5. Click Save.

### 2. Importing your RIS file into Zotero

Follow these steps to import your RIS file into your Zotero library.

1. Open Zotero.

2. In the “Actions” menu, under the “gear” icon, choose “Import”.
3. Find your RIS file on your computer.
4. Click Open.
5. View the information that Zotero imported.
  - a. Check that all your information appears, and make any modifications you need to make, such as re-inserting paragraphs into long notes.
  - b. Refer to your list of unique fields and check that those transferred appropriately.
  - c. If you find systematic problems, you may need to make modifications to your RIS file, or to the EndNote® library, and try the export/import process again. For further details, see [this guide](#) provided by George Mason University Library, or see [Zotero documentation](#).

### XIII. ENDNOTE / ZOTERO COMPARISON

	ZOTERO	ENDNOTE
<b>COST</b>	★★★ Free (until 100 Mb pdf)	- \$100 (educational license)
<b>LICENCE</b>	★★★ Open Source	★ Under license
<b>ACCESS</b>	Local + web interface	Local / web (EndNote Web)
<b>COLLECTING SOURCES ONLINE</b>	★★★ Simple (single click, saving web pages...)	★★(★) The bookmarklet isn't as efficient
<b>ORGANIZING</b>	★★★ Easy	★★★ unlimited number of libraries
<b>CITATION STYLES</b>	★★ 2827 styles + possibility to create styles	★★★ 5316 styles
<b>SYNCING</b>	★★★ Simple (a few clicks, then it's automatic); efficient; practical (sync your library on different computers you use); intuitive; accessible offline.	★ EndNote web doesn't sync easily nor well with your desktop library; slow; unintuitive interface
<b>SHARING OPTIONS</b>	★★★ Different types of groups (private/public; read only/edit...)	★ No possibility to share a group publicly: manually add users
<b>STRENGTHS</b>	<ul style="list-style-type: none"> <li>• Simple download of records</li> <li>• Good for managing a variety of formats, including webpages</li> <li>• Offers more functionalities in a free, open-source product</li> <li>• Downloads records from with several databases that don't work with EndNote, such as Factiva.</li> <li>• Sharing</li> <li>• Syncing</li> </ul>	<ul style="list-style-type: none"> <li>• Excellent for organizing citations for papers and theses</li> <li>• More options for customization and formatting</li> <li>• Can handle a large amount of references</li> </ul>

## SOURCES

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### 2. In french

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