Introduction to ZOTERO 4.0: managing documentation in the digital era

Atelier Multimédia

Villa Schifanoia, 18 February 2015
Seminar Room 2, Badia Fiesolana

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Introduction to Zotero 4.0

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Chapter 1

What is Zotero 4.0?
[zoh-TAIR-oh]
Introduction to ZOTERO 4.0

S.Noiret: Zotero 3.0
23/02/2015

Roy Rozensweig Center for History and the New media, George Mason University, Virginia, USA
Zotero 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 won the best Computer Instructional Software Award already in 2007 and 2008!
What is Zotero 4.0?

- **Zotero 4.0** is a standalone software coupled with the browsers Safari, Google Chrome & Firefox
- Zotero 4.0 lives coupled with Mozilla-Firefox (now v.24.0.1)
- Zotero is available for Mac OS, Windows, and Linux
- Zotero is available in many languages
- Zotero is Open Source and serves a worldwide user’s community
- Zotero is freely available with an Educational Community License
- See *How to install Zotero 4.0* in the Zotero EUI Blog

23/02/2015
Introduction to ZOTERO 4.0
You interact between your computer, portable devices and the web through the browser.

You capture full web pages with texts, images and PDFs: the web offers digital literature (e-books, e-journals, etc.).

You collect bibliographical records from OPACs and databases.

You create your own knowledge based Research Library, a personal digital laboratory and database with:
- (born) digital primary sources and meta-sources
- multi-media contents

Zotero is a research tool which capture and manage all these contents.
Collect, Manage, Cite & Collaborate

• **Using Zotero:** you capture and store PDFs, images, links, whole web pages, videos, bibliographical citations, etc.
• You add notes and comments to documents
• You add tags/keywords
• You search within your personal library collection
• You save PDF documents, tag them and search within when converted to text-PDF
• You capture bibliographical citations using a variety of import/export styles (more than 1,100)
• You cite-when-you-write within Word, LibreOffice, NeoOffice & (OpenOffice.org)
• You integrate Zotero contents in Blogs and Wiki’s
• You access Zotero from all your computers
• You share documents with others (Zotero Commons)
• You’ll benefit of other APP’s integrated to Zotero
Zotero at the EUI:
- Blog blogs.eui.eu/zotero/ by EUI Zotero Tutor, Alfredo Mazzamauro
- Zotero EUI Library Info Page

Follow Zotero on Twitter
- Find Zotero on Facebook
- Zotero blog
- Zotero Francophone

- Zotero Documentation
- Zotero Screencast tutorials & Zotero Tour
- Many Zotero Tutorials in YouTube
- Zotero’s Forum
- Zotero’s FAQ
- Getting Involved with Zotero
Chapter 2

Installing Zotero
How to install Zotero 4.0 Standalone (Zotero EUI Blog)

• 1) First of all, download the installation file of Zotero standalone for your operating system [here](#).
• 2) Then, double click on the installation file and follow the wizard installation procedure.
• 3) Once you have installed Zotero standalone, go to Zotero>Preferences>Sync.
• 4) Insert an account name and password you created before here.
• 5) Close the Preferences window and go back to Zotero.
• 6) After some seconds, your Zotero standalone should be synced with your library and you should be able to start to work with it.
Important Zotero 4.0
Standalone Features

- **Zotero Standalone**
  - Run Zotero as a separate program -without using Firefox- and available for Mac OS X, Windows, and Linux

- **Zotero Connectors**
  - Plugins available for Chrome, Opera and Safari and Standalone-compatible mode for Mozilla-Firefox
  - Save items directly to Standalone or to your zotero.org library

- **Duplicate detection and merging**
- **Word processor integration improvements**
  - A streamlined Add Citation dialog for quicker citing
  - Ability to edit citations directly in the word processor document
  - Sharing of word processor documents with users of Zotero and other compatible software without using Zotero groups

- **New features with Zotero 4.0**
- See the 4.0 changelog for a complete list of changes (v.4.0.26 - February 11, 2015)
Zotero working area: the 3 Pins

Click on the image to follow the Video Tutorial: Getting Stuff Into Zotero
Organizing your Zotero Library

- Getting Started (global tour)
- Finding items in our Zotero library
- Managing the library: collections and tags
- Manually Creating items in the database
- Adding files and linking to files outside the database
- Creating Notes and Generating Reports
- Retrieving PDF meta-data's
- Organizing contents in the Zotero Library like using a Timeline, etc.. (Described during the Advanced Course)
Chapter 3

Getting Stuff Into Zotero
Short video introduction to Zotero
Getting Stuff Into Zotero

1. Location Bar Icons.
2. Create New Item from Current Page button
3. Adding PDFs and Retrieving Metadata’s
4. Looking ad Items by Unique Identifier, ISBN, DOI, etc.
5. ManuallyAdding Items
6. Importing Records from Other Reference Tools like EndNote, Citavi, Refworks, Mendeley, etc., using compatible import formats like BibTeX, RIS, Refer/BibIX, Unqualified Dublin Core RDF, etc..
Capturing the web with Zotero

- The web is not stable by definition: Zotero captures today what you will need to view tomorrow.
- Zotero is creating new kind of primary sources directly from web sites viewed in your browser.
- Web sources need to be contextualized with Zotero tags, notes, meta-data’s and folders.
- Using the web as a «primary source database» obliges to find web sites not anymore available online and previous versions of websites. Zotero keeps as many versions you need inside your folders.
- Zotero offers a correct way to cite and re-use captured web contents
The Institutions of the European Union recognise that their Internet presentations possess a wealth of information under constant change and at risk of disappearance. To preserve this web heritage of immense archival value, the Historical Archives of the European Union, in close cooperation with the EU Inter-institutional Web Preservation Working Group, has launched a web-archiving pilot on EU institutions’ websites, which is carried out in collaboration with the Internet Memory Foundation. Each link below points to the collection of available copies of website contents captured quarterly since the end of 2013 to present.

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- Copies of website contents captured quarterly since the end of 2013 to present are available.
EUI website historical versions: from archive.org to Zotero
Organizing Knowledge: Storing Files into Zotero

Use the “Store Copy of File” Function
Saving PDFs into Zotero
Adding PDFs to Zotero

- Zotero can attempt to identify PDFs you have saved to your computer.
- Just drag them into the middle pane
- Right click with your mouse on them and select “Retrieve Metadata for PDF”.
- If Zotero finds a PDF in Google Scholar, it creates a new library item, downloads the citation information and attaches the original PDF to the new item.
- How to interact with PDFs using Zotfile (Zotero plugin to automatically rename, move, and attach PDFs or other files to Zotero items) and how to convert PDF to text PDF will be shown during the Advanced Zotero Course
For a PDF Full text indexing your PDF should NOT be only images

Zotero index the whole PDF text

Zotero grab PDF meta-data’s

The software pdftotext is a plugin which converts all your PDF to Text PDF for Zotero

Xpdf project (OS cross-platform PDF viewer)
Organizing Knowledge: Creating Reports

PI: Carlo Ruta, la chiusura del blog allarma la rete

Type Page Web
URL http://punto-informatico.it/servizi/ps.asp?id=2330045
Accédé le Saturday, June 28, 2008 3:59:56 PM
Date d'ajout Saturday, June 28, 2008 3:59:55 PM
Modifié le Saturday, June 28, 2008 3:59:55 PM

Pièces jointes
- PI: Carlo Ruta, la chiusura del blog allarma la rete
Organizing Knowledge: Creating Timelines

Example of a timeline feature in ZOTERO 4.0, showing how to filter and highlight entries by year or date.
Chapter 4: Bibliographical records & Bibliographies
• Zotero can generate complete bibliographies in MLA, APA, Chicago styles, etc., *(today 6,678 journal styles available by discipline)*

• Zotero allows you to create *your own citation style*: see [Zotero EUI Blog](http://eui.zotero.org) for an Italian Citation Style

• You are able to insert and *generate bibliographies citing when you write* with Word, LibreOffice, Open Office and NeoOffice.

• You may create a bibliography from each item you have saved in your Zotero library using right mouse button.

• You may transfer citations from Zotero to EndNote and from EndNote to Zotero
Downloading citations from many databases

- EUI OPACs: Biblio & Encore
- ABI/INFORM Global
- America, History & Life
- Historical Abstract
- Factiva
- Google Scholar
- IEEE Xplore
- JSTOR
- ScienceDirect
- ABC-CLIO
- Amazon
- ARTFL Encyclopédie
- British Library Integrated Catalogue
- Copac Acad. & National Library Cat.
- EBSCOhost
- ERIC: Education. Res. Inf. Center
- Google Scholar
- Google Books
- HeinOnline
- LexisNexis
- Nation. Bur. of Economic Res. (WP)
- New York Review of Books
- OCLC WorldCat/FirstSearch
- Project Muse
- ProQuest
- Revues.org
- Scirus
- ScienceDirect
- SpringerLink
- Système univ. de docum. (SUDOC)
- The Economist
- Hypothèse.org
- Wikipedia
- Blogger
Importing Citations to Zotero

- Updated list of compatible sites
- EUI Library catalogue Biblio.eui.eu
- Google Scholar
- Google Books
- Historical Abstract & America History & Life
- OCLC – Worldcat/FirstSearch
Citing & creating bibliographies: Zotero with Word and Open Office

- Installing the [Zotero-for-Word plug-in](#)
- Using the microsoft word plugin, you will be able to insert, modify, complete citations and create bibliographies. (See [Tutorial and follow the Advanced Course](#))
- [Using Rich Text Format (RTF)](#) documents you may cite directly into your document
- You can use Drag & Drop inside documents
Type as much or as little of the title as you want, omitting initial articles such as the, a, le, l', il, les, etc. For example:

- logic of collective action
- logic of collective
- logic of c
Using EUI Library WebBridge with Zotero

- You must configure the OpenURL preferences in Zotero first to use CrossRef functions (meta-data exchanges) between databases. In simple words: *connect bibliographical items to full-text contents at your academic library.*
- Zotero's *Locate Button* ("Library Lookup") will link directly to EUI SFX URL resolver.
- It means accessing full contents through the EUI library if available.
- You must copy/paste the EUI resolver version 0.1 in Zotero advanced/preferences/OpenURL
America History & Life and Historical Abstract

Search: America: History and Life with Full Text
Choose Databases
Zotero
AND
Zotero
AND
Search
Clean
Add/Row

Basic Search | Advanced Search | Classical Search | Search History
Results may also be available for: aetna, zotero, cetara
You may want to try your search again after following one or more of these tips:
• Check the spelling of your search terms. Correct any misspellings and re-run the search.
• To broaden your search, use the Boolean operator OR. For example, type: Slavonic OR cats.
See hints for suggestions.

Digital Tools: Zotero and Omeka.
Subjects: GEORGE Mason University; WEBSITES -- Reviews; INTERNET research
Database: America: History and Life with Full Text
Add to folder
PDF Full Text (144KB)

DIY Image Management with Zotero.
Subjects: DIGITAL images; HISTORY -- Sources; ARCHIVAL research; HISTORY & technology; HISTORY -- Methodology; ARCHIVAL materials -- Digitization
Database: America: History and Life with Full Text
Add to folder
PDF Full Text (74KB)

Zotero: Social and Semantic Computing for Historical Scholarship.
Subjects: WEBSITES -- Evaluations; ONLINE data processing -- Computer network resources; BIBLIOGRAPHY -- Documentation; COMPUTER programs; HISTORY -- Research; TECHNOLOGY
Database: America: History and Life with Full Text
Add to folder
PDF Full Text (99KB)
ProQuest IBSS: International Bibliography of the Social Sciences

International Bibliography of the Social Sciences (IBSS)
This database includes over two million bibliographic references to journal articles and to books, reviews and selected chapters dating back to 1951. It is unique in its broad coverage of international material and incorporates over 100 languages and countries. Over 2,600 journals are regularly indexed and some 7,000 books are included each year.

You have access to:
- International Bibliography of the Social Sciences (IBSS)
- ProQuest Deep Indexing: Comprehensive Social Science
- More information
- View title list

Subject coverage
- Anthropology
- Archaeology
- Cultural studies
- Demography
- Economics
- Education
- Ethnology and ethnography
- Political science
- Religious studies
- Sociology
• Zotero tutorial for Google Products
• Zotero and Google Docs/Drive
Google Books
• Zotero users can automatically grab references mentioned in Wikipedia using the encyclopedia’s native citation format.

• Zotero includes Wikipedia Citation Templates as a new export format to add references into Wikipedia.

• Wikipedia citation templates for books and articles embed COinS tags in each bibliographic entry (see, for example, the Wikipedia article for “Amphibian”)

• Users may export Zotero references into Wikipedia, they can also import Wikipedia references into Zotero.
Plugins for Zotero (Advanced Zotero Course)

- A list of Zotero plugins’ is available
- A European open source plugin: BibUp at the University of Fribourg (CH) creates bibliographic references by scanning books barcodes and extracts of text. The references, including the OCRed text. It can be viewed on a web page and collected using the Zotero plugin for Firefox
- Zutilo for Zotero Mozilla-Firefox, etc.
- Plugins will be shown during the Atelier Multimédia Advanced Zotero Course.
Chapter 5:

Zotero Syncing & EUI-RRCHNM agreement
Zotero Syncing at the EUI

- Zotero 2.0 and later versions, supports **online syncing**, allowing you to access your Zotero library everywhere.
- Zotero syncing has two parts: data syncing and file syncing.
- The **EUI has agreed (2013)** with the CHNM to load all EUI user’s Zotero libraries safely in Virginia up to 1 Gb of space.
Zotero File Storage is a cloud-based syncing and storage solution for PDFs, images, web snapshots, and any other files attached to your Zotero libraries.

Zotero File Storage synchronizes the files in your personal Zotero library to all your computers, allows you to share the files in your group libraries, and makes files available through the zotero.org website.

Each Zotero user is given 300 MB of free storage, with larger storage plans available for purchase.

Starting 2013, EUI members are allowed to store 1 Gb of data’s at the RRCHNM in Virginia using their @eui.eu email.
Creating an EUI account with Zotero

- Registering a user account allows you to sync your library, participate in groups, or post to the support forums and be allowed the extra space that the EUI provided for you in GMU.
- See [EUI Zotero Blog](https://www.zotero.org) to know how to create an account with Zotero.
Zotero People and Zotero Community

- **Discover** researchers working on similar projects.
- **Browse** through other researchers’ CVs and shared libraries.
- **Create** your own Zotero profile to help other researchers discover you and your work.
- **Sign up** here