

## **Transcript from Zotero Session, March 12, 2019, Wartburg Theological Seminary**

This is Ericka Raber at the Wartburg Theological Seminary, Reu Memorial Library. Today I'm going to give an overview of the Zotero Workshop that I gave on Tuesday, March 12, 2019. This video will be about half an hour.

I'm going to go through the following things. I'll give you an overview of Zotero. We'll look at downloading Zotero and setting up Zotero to sync with the online version of Zotero. We'll talk about how to get stuff into your Zotero library, including articles and books and other things. We'll also look at using Zotero with Microsoft Word; specifically, how to create a bibliography, how you can create an easy annotated bibliography, and how you can use Zotero to insert your citations into Word. And, if we have time toward the end, we'll talk about how you to manage your Zotero library.

I'll also highlight some additional resources and contact information on the library's homepage. There is a link at the bottom of the library's homepage, that takes you to a page called Tutorials, Citation Management & More. I'll show you that in a little bit. If you have questions, you can contact the library by phone or email.

I'm going to start at Zotero's homepage, Zotero.org. A lot of what you would need to get started is on the Zotero.org website. Let me tell you a little bit about Zotero. Zotero is a free online tool that can help you gather, organize, and cite information. It can also allow you to share research, share citation work together on papers or projects. Zotero.org has a lot of helpful information. Just on this first page, there is an overview of the Zotero interface. It is an application that you download and install onto your computer, but it also works with an online version. And I'll show you later how you can sync this library that you'll develop with the online version. That will allow you to access your library remotely through the web. You'll also be able to access your library on multiple computers.

This is what the library looks like. I'll show you a live version of my library in a just a little bit. When I scroll down a little more, you can see there is a quick video that shows you how simple it is to get items into your Zotero library. Basically, you're just going to click on the icon in the upper right next to your URL bar.

It shows you different ways that you'll be able to organize your materials. This will be your list of items in your library, and then you'll have just what you would expect in any file management system, you'll have file folders, and categories for your various projects. These categories could be classes, your thesis, or potential research in the future.

And this icon shows you that you can use Zotero to work with Microsoft Word to reference your Zotero library and insert citations in the style that you choose. At the seminary, here, we use Turabian. Turabian should already be downloaded. I'll show you how to select Turabian in Zotero, so that Zotero knows that you want to use Turabian, and will create your bibliography using that style. Zotero works with over 9000 citation styles. It might be a surprise to people that there are that many styles. There are the ones you might expect—APA and Turabian—but, there are also styles for specific publications. So, if you ever write for a publication that has a specific style guide, chances are Zotero knows that styles and can help you write in that style.

As I mentioned, you can sync your library so that you can access it from other computers, other devices, and online. We won't be talking today about how to use Zotero to collaborate, but you can find out more information here on [Zotero.org](https://www.zotero.org).

Zotero is open source. It is freely available. There is a way to upgrade your storage at a cost, of course. I believe for most of your research as a student you should be able to get away with using the freely available version.

This is where you would go to download Zotero. When you download Zotero, you will also be downloading a plug-in that will work with Microsoft Word that will allow you to cite within Word. Also on the Zotero site, this Documentation link is very helpful. It includes a lot of additional tips, and short descriptions and how-to instructions. Before we leave [Zotero.org](https://www.zotero.org), I want to point out that this is where you would go to create an account. I would strongly encourage everyone to have a Zotero online account. Mine is here: [eraberwart](https://www.zotero.org/eraberwart). An online account will allow you to have access to your library remotely. So, if something happens to your computer, and if you don't have Zotero on any other computer, you can log into [Zotero.org](https://www.zotero.org), and view all the items in your library by clicking on My Library.

This is what my Zotero library looks like in this online version. I'm going to switch now to show you what the Zotero application looks like. In the bottom of the screen you'll see the Zotero icon. This is the Zotero application on my computer.

Before I give you the orientation to the library, I want to point out how you would set up Zotero to sync with your online account. You would go to Edit > Preferences, and then click on Sync. You'll get an option to enter in your account username and password. I would recommend selecting the options in the File Syncing box. If you ever have challenges with Zotero interacting with any other applications, such as Word or the frequency of updates, this is where you would find that information. Again, under Edit > Preferences.

Let's look at my Zotero library, and then we'll talk about how to get things into your library. My library is a collection of articles and books. This center area shows all of the items in the collection that is highlighted on the left. My Library is selected, so these are all of the items in my library. I also can select a subsection of my library. I have a folder called Empathy, and if I click on that, I'll see all the items that are in my Empathy folder. If I click on an individual item, on the right-hand side, we'll see information about that item. (8:45 min)

This is all the metadata about this item including what it is. It's important that Zotero recognizes that this is a journal article; that will help Zotero format it correctly in the various styles. This is the title, the author, etc. Should I need to alter or change any of the information in my library, maybe I brought the record in from a database, and something isn't right, maybe these words are in all caps, I can change that in this text box. And when I click anywhere else, Zotero will remember the changes.

For each of these items, I can select notes to add. I can put tags on these items; I can create my own tags, and maybe tag this for a certain paper or scholar, whatever might help me to access that item in the future. I can connect items to each other. Maybe this item here is related to another item in my Empathy folder or somewhere else.

You'll have to decide how you want to use Zotero, if you decide to use it. I encourage you to use something to manage your materials and your research. One of the reasons it's important to have a

system for tracking your research, is that it can really save you a lot of time. It can save you energy, especially during times when you might be stressed or find it challenging to keep track of what you read. Zotero can be an extension to your brain in a way. It can help you to keep track of all those things that you've read or want to read. You could create a folder for future reading.

You can put an item in multiple folders. You simply drag it into another folder. It is best, however, to have only one instance of each item in your library (My Library). So, you shouldn't have duplicate items, and it looks like I might have some duplicates here. For each item, you can put them in multiple folders.

Let's say: "I don't remember... all I can remember about that article is that it had something about brigades in it." You can search your library—everything that you put into your library—and hopefully find, what you were thinking about. Zotero can help jog your memory.

Another cool thing is that Zotero can help you track the full text of items. For each of the items that has a blue dot here, under the paper clip icon, the full text is already in your Zotero library. You can double-click on these PDFs to see the full text.

So, how might Zotero work for you? Maybe it could be a tool to keep track of the things you have read or want to read. You could also expand that a bit, and use Zotero to write your paper in Word, and I'll show you that in a minute.

First, let's look at how you get items into Zotero. So, we're going to go to the library's home page, and we'll search the catalog.

Here I am at the library's home page. I'm going to search the catalog, and look for a couple of things to add into my library. I'm not saying this is a great search, but it might retrieve some helpful results. Because I've already added some of these items here, I'm going to go to page 3 to see what is available there.

Let's say that I like some of these things, and I'd like to add them to my Zotero library. One trick is that you have to have Zotero running in the background, you have to (it's best to) have the folder selected for where you want the items to go. You could put them into My Library and sort them out later, but if you have the folder you want already selected, the items will already be where you want them to be.

We'll go back into the catalog. Zotero installs a plug-in for the browser, so when you download Zotero as an application, you can also download a plug-in for the browser you use. You can't use Microsoft Edge (Zotero doesn't work with Edge), but it does work with Chrome and Firefox. I'm using Chrome here. When you use your browser and Zotero is open, you can click on the icon (either a folder or an article or item icon). If you click on the icon when it is a folder, you'll see the items that are displaying on the page. Zotero is grabbing the metadata for these items, and it allows you to select the ones that you want.

Oh, look, The Librarian as an Image of Pastoral Care. I didn't know that would be there. Let me pick a couple others. And then I click OK, and it should say that items are going into the Empathy folder. So, I can go back into Zotero to check on that.

In Zotero, I can sort my items by title, creator, and date added. I can select date added, so that the items I just added appear at the top of my list. Whenever you add something to your library, I encourage you to look at the information that was added, to see that everything looks correct. It might be best to add

books from the catalog (rather than articles). When you use an article database, you might be in a better position to grab the full text of the item. It looks like Zotero did grab the full text of the first item, so you can double-click on that and the full text should open. So that's an easy way to get items into your library from the library's catalog.

I'm going to show you now how to get items into your library from a database such as an EBSCOhost database. So, we'll click on the Research Tools link, and this takes you to a selection of resources including databases that are helpful for seminary students. ATLA is a great place to look for articles about religion and religious studies. When you go into ATLA, you can do a variety of searches. This time I'm going to switch topics and make sure that my Forgiveness folder (in Zotero) is selected.

Let's try this search: forgiveness and (preaching OR homiletics). There are better ways to search. Sometimes it works well to select subject headings, but you have to know whether the database you are using applies those subject headings. Sometimes you can filter by date and make that more manageable, so that you have fewer results to work with. It's nice to see how to narrow your results.

On preaching the need for forgiveness... this is kind of what I was thinking about when I selected this topic. Again, you can see that there is a folder icon that you can click on, and then select the items you want to add to your Zotero library. You can also look at each individual item, and then add them with this article icon. It looks like it did grab the full text. That's how you go about adding items from an EBSCOhost database. Most databases work the same way. You just have to make sure that Zotero is grabbing the metadata for the items.

Remember that when you add items into your library, you'll want to make sure that the information about each item is correct because this is the information that Zotero will use to create the bibliographies. If anything isn't quite right here, it may show up in your bibliography.

So, now that we know how to get items into our Zotero library, let's look at how Zotero works with Word. (20:02)

When you download the Zotero application, it may ask you to make sure that you have closed Microsoft Word, because it will want to install a plug-in that works with Word.

Once you're ready to write, and you're typing along... and there's this really great person that said this.. And you want to grab something from your library. If you click on the Zotero button/menu, on that (top) ribbon, you can add a citation. Zotero will ask you first, which style you want to use. And this is where, if you don't see the style you need, you can click on Manage Styles... and grab a different style. You'll have to select how you want to display your citations. These are the recommended setting. Here it is going to automatically update the citations, so that any time the information in your library changes, it will automatically update those in the paper that you are writing (you may need to click on Refresh). So, I'm going to say, OK, I'm going to use Turabian. When you click on Add Citation, Zotero should insert a footnote and give you a pop-up bar that allows you to type in something about the person/work you'd like to reference.

I'm going to select McKee, and Zotero inserts the footnote at the bottom of the page. And then, if I do another one... another great person said this.. I again go to the Zotero tab, and select Add Citation. Zotero inserted a 2. I'm still working from my empathy folder, and I'm going to select this one. And I

could put in a page number here. This should work. (I couldn't get the page number insert to work for this example.)

When you're all done with your paper, you can insert a page break and type in Bibliography, and you can have Zotero create your bibliography for you. You click on Zotero > Add Bibliography. You may notice some imperfections here. It may not be perfect. What you can do, is work with Zotero to degree that it helps you. When Zotero stops helping you (or is no longer helpful), you can tell Zotero that you want to unlink the paper from your Zotero library. And then it will allow you to save the document as a Word file that is not connected to your Zotero library, and you can make any changes you want. Until you unlink your document, Zotero will remember what you've referenced in your paper, so if you delete a citation, Zotero will remove items that you haven't used, and it will add new items. It will also make corrections based on the records in your library.

I said earlier that I would show you how to do a quick-and-dirty bibliography, as well. Let's create a new blank document. We'll create a Bibliography. And we'll go into Zotero, and we'll grab things from the Gandhi folder. You can select all of these items, and right-click and Create a Bibliography from the Items. It will ask you what kind of output you want. We're just going to copy and paste, so we can click OK, and go back into Word. (25:27)

We'll just use Ctrl + V to paste our bibliography. It looks like I will need to correct the margins here, but the style is there, and it looks pretty good. There might be some changes that I would want to make. If you have notes, you can insert them, and that can become your annotated bibliography.

Zotero should be able to save you a lot of typing. It should be able to help you recall the works you've read for classes and assignments. It may help you to keep track of research for future projects. There are a lot of things Zotero can help you with.

The last section of this session will be looking again at the Zotero library, and ways to effectively manage your library. You could build your library to the point where you have a lot of stuff. And, if you do research in separate sittings, it's likely that you will end up with some duplicates in your library.

It is a good idea to have only one instance of each item in your library. Zotero has a tool to help you identify duplicates. Let me click on Duplicate Items here. You can merge the items that have been identified as duplicates. Or you can select one of them to keep, and one of them to delete. You can select the one that you think is better, or more complete. I like this one here because the title words are capitalized. What else does it have? Just the date...maybe that's good. This one has the journal title, so I'm going to select that one. So, I've merged those records, and I guess there are no duplicates. I do, though, like to do a spot-check by selecting My Library and sorting by Title and maybe Author/Creator, to see if there are any other possible duplicates. I thought I saw some earlier in Empathy. I would wonder if this one is a duplicate. One of them says it's a book, and one of them says it's an article. It's possible they are both right, but I should investigate that because that could be a challenge for Zotero and for me to know which item I want to reference.

It can be helpful to look through your library. I mentioned using Notes and Tags—that can be a helpful way to remember and retrieve your items. There are also some tags that are preassigned that are grabbed with the items. Sometimes they are helpful. Sometimes they might be too general. There was only one item with the tag Pastoral Theology that was tagged when the item was downloaded. We

talked about how to get items into Zotero from databases, and that is the best way to get items into Zotero.

But, it's possible that you might not have a record for an item. For example, maybe you had an interview with somebody or there was a podcast you listened to. You can create a record manually just by selecting this + icon. And then you can add the title and all the information about the item, and Zotero will create an item (record) for you.

The items with the blue dot have the full text. If you have a scan of a book chapter, you can add an attachment and link to a file you have. You may have notes that you would like to attach. You can attach multiple files. You may have publications of your own that you'd like to include. There's a new publications tab on the left side that allows you to do that. You can add works that you've created here, and then you can revisit those as you write future articles. Remember that work I wrote years ago...? I want to cite that one piece... and use that again. This can help you remember what that was.

Just to wrap up, I want to emphasize that Zotero only works with the information that is available to it. So, whenever you bring items into Zotero, you'll want to check the record because that's what Zotero will use to build your bibliography. You don't have to use all the bells and whistles of Zotero, but if you do, it can be a powerful tool. If you need additional help, Zotero's documentation is very helpful, so I would start there.

On the Citations page I mentioned, the Tutorials, Citation Management & More page, linked from the bottom of the library's home page, there are some other tips and tutorials on Zotero that could be helpful. I especially like this series of tutorials from Idaho State because they are brief, and you can just pick the topic that you want or need.

So, that's all I have. I'll leave you with this information for any questions you might have. Thank you. Good luck using Zotero.