

## Tutorial/Workshop Session 1: Nicolas Chachereau(@nchachereau): Zotero and Citation Management Softwares [notes by @twinkling\_sheep here]

- introductions of everyone here (very nice group of diverse people!)
- demonstration of the manual pitfalls of referencing by hand as opposed to the ease of Zotero in footnotes
- discussion of some of the other reference options

### A List of Possible Citation Sources

- - Endnote is well-known (license is offered in many universities (i.e. standard in Lausanne) but as soon as you leave university you have to pay for upgrades): <http://endnote.com>
- - Mendeley (free): <http://www.mendeley.com>
- - Litlink: <http://www.litlink.ch/home/>
- - Citavi (free if you have less than 100 references - not very useful for a dissertation): <http://citavi.com>

### Why Zotero?

- easier than endnote?
- free and centralized
- reference to Mendeley's comparis: <http://www.mendeley.com/compare-mendeley/>
- problematic with Ipads
- way of collecting, organizing, citing, synchronizing, and collaborating
- also free for downloading
- accessible both online and on laptop (can sync) although pdfs won't be available
  - -- additional storage space can be bought, but you can also hyperlink to jstor articles etc.
- two versions of Zotero: one is a stand-alone; the other is a firefox extension. Recommended that you use Firefox extension version, esp as you can link it to the way you search and because it was originally designed for Firefox (nevertheless i have downloaded it to Safari). But it is equally possible to do it through Safari.
- personal downloading tutorial ensues :)

Once downloading is complete, we go to [tiny.cc/CHDH-Zotero](http://tiny.cc/CHDH-Zotero) and the "real" tutorial begins!

- open Zotero application, which should install the extension directly onto your browser (so you click the icon to save the reference) --> must also install the browser extension

### Some tips:

- sometimes when you click, the entry might appear in lowercase (or similar): you can right-click, transform text, and then change the title case or sentence case so that things will get capitalized automatically
- manual additions possible: click green "+" and add entries automatically
- Zotero isn't the ideal method for citing archives/manuscript
- when you save off browser, it'll automatically download the pdf as well
- make changes to entries as you go along (make sure your import looks like and represents what you've imported)
- *Troubleshooting*: the option to save the snapshot from Zotero is not available automatically on Safari (only on Firefox). To do so, right-click anywhere on the screen and press "Save Zotero Snapshot from Current Page"

### Adding a citation to Word (as footnote):

1) - click Zotero insert citation button (r." z) (not ideal for MLA style [discovered from experimentation])

2) - choose style

*Note: Zotero.org/styles - can download styles from Zotero from here*

3) - click on book of choice that shows up in library of references

4) click on bubble that appears after selecting book and add page information

- can add footnote as well in MLA-style

--> select footnote from insert menu, then put in additional information to "prefix" or suffix option (no word limit)

- possible to export Endnote library with formatting etc.

\* wiki on Zotero page that gives all information about this (in English)

- export to RIS and then import to zotero (double check when internet goes back up)

### Suggestions from Experts

- go to Zotero website and create an online account: then create login and password to synch data

- Back up Zotero library all the time!!

- go to "Preferences" in Zotero, advanced tab, and create a dissertation file (or whatever the title of your research project) so that it doesn't get lost in the random mozilla or safari file.

- use "tags" to organize bibliography (tags will appear in hyperlinked words at bottom of Zotero)

Note: import from library catalogue: will create tags as a default (you can get

rid of it by going to general preferences and dis/enable that feature.

### **To create a bibliography without making it a citation**

- 1) select references
- 2) right click on selections and select “Create bibliography from item”
- 3) choose style (MLA, ALA, Chicago, etc)
- 4) choose output mode (i.e. copy to clipboard if you’ re making it into bibliography on word document, and copy/paste into word doc)

- can cite from Zotero in an email:

option 1 - drag and drop

option 2 - same as above for creating bibliography

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thank YOU for contributing! (keep it up)

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