

Zotero Software for Effective Reference Management

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Abstract

Zotero is a personal research assistant. "Zotero is the only research tool that automatically senses content in your web browser, allowing you to add it to your personal library with a single click" (1). Zotero is free and open source reference management software. This software is used to control bibliographic data and such other related research material (like PDF files). Firefox web browser is the enabler to use Zotero. Zotero is similar to popular citation tools like EndNote Zotero can be used to store PDF files, Websites, Blogs including videos in a easy to use format. The researchers can import and export citations, create bibliographies, and insert citations into their word processor. In this paper a step by step description of the installation, application and uses of Zotero are provided. Further, working in the Zotero software using online database and online digital libraries is systematically presented. The paper indicates how Zotero is a research tool that automatically senses content and allows users to add the same to their personal library.

Keywords: Reference management tools, Zotero, endnote, open source reference tools

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INTRODUCTION

In the model of scientific enquiry, literature survey is an important part. From a very long time researchers are carrying their studies based on the results of the research reported in scholarly journals and other sources of information. The review of literature helps in evaluating the subject background of a general theme of the research. There is huge amount of information available in a given subject both on the web and off the web. In fact the scholars and professionals have been faced with the problem of how to keep their research in order.

Researchers study hundreds of articles during their research. With the increase in electronic collection and freely available material on the net, the reading behaviour of researchers is on the rise. To add to this, the researcher also has access to many data bases.

To keep pace with voluminous information, researchers earlier used to maintain 5 × 7 cards and write the abstracts and file all their citations. As the use of personal computers increased, reference management software (also called citation management software, personal bibliographic management software, reference database software, and many other

names) took birth. Software such as EndNote, RefWorks, Connotea, and CiteULike, custom styles are very much useful to researchers. So also new reference management software has emerged in the recent times called Zotero. It is developed by the Centre for History and New Media at George Mason University. It tries a new approach to the task of citation management.

It is not a stand-alone application. It is an add-on to the Firefox web browser that tries to integrate the best parts of older reference manager software (like EndNote). It has the ability to store author, title, and publication fields and to export that information as formatted references and the best parts of modern software and web applications (like iTunes and del.icio.us), such as the ability to interact, tag, and search in advanced ways.

DEFINITION

Zotero

The name Zotero is derived from an Albanian verb meaning "to master."

Zotero is free and open-source reference management software to control bibliographic data and such other related research materials (like PDF files).

INSTALLATION PROCEDURE

Zotero (pronounced zoh-TAIR-oh) is a free Web 2.0 citation management tool that is an extension for your Firefox web browser. This means that you need to first have Firefox. If you do not, you can download it for free at www.firefox.com. However your citations are stored on your computer so you can access Zotero when your research takes you to places

far removed from Wi-Fi. Similar to the popular citation management tool EndNote, Zotero stores citations from library catalogues, proprietary databases like ATLA and JSTOR, websites, blogs, even videos and stores them in an easy to use format similar to iTunes. You can also import and export citations, create bibliographies, and insert citations into your word processor [1].

Step 1

www.zotero.org:

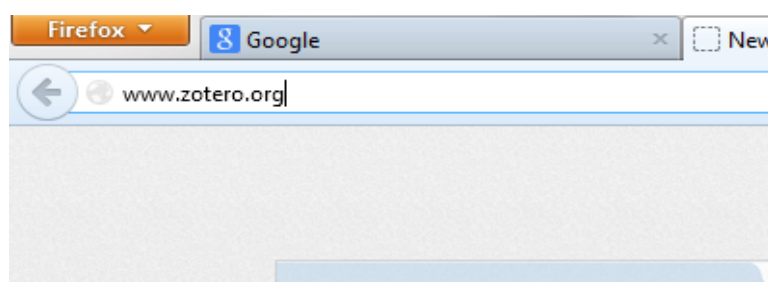


Fig. 1: Searching for Zotero on Google Page.

To go to Zotero, open Google search engine, and type the URL for Zotero as shown in Figure 1.

Step 2

Zotero Home

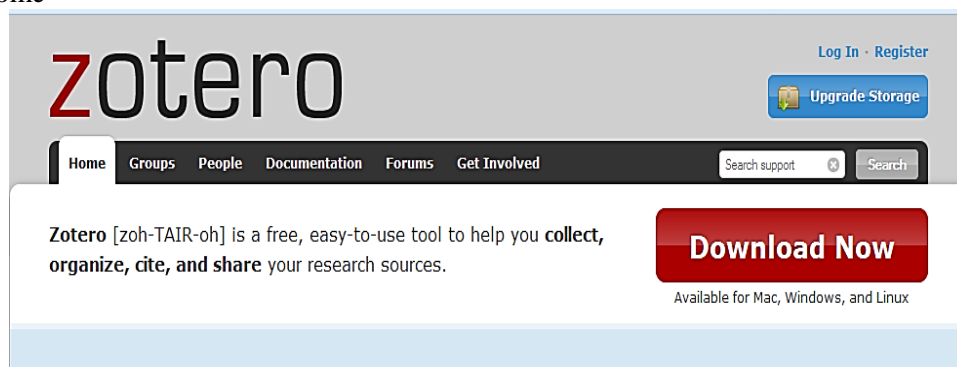


Fig. 2: Opening Zotero Home Page.

As you search for Zotero on Google search engine using the URL www.zotero.org, the page as shown in Figure 2 will appear, which is the home page of Zotero. On the top right side the home page has “Log In. Register”.

Right below this is ‘Upgrade Storage’. The home page has six elements. They are as follows: They are Home; Groups; People; Documentation; Forms; Get involved. Right next to that is search bar, called “Search Support.”. This is used to search whatever details we require from Zotero. Below these elements is the description about Zotero (zoh-TAIR-oh), which says, “Zotero is free, easy-to-use tools to help you collect, organize, cite,

and share your research sources.” The page also indicates “Download Now” which is available for Mac, Windows and Linux. This page also directs the user to collect; organize; cite; sync; and collaborate. Each task is prefixed with an icon. The icons are shown in Table 1. The table clearly shows the description that appears below each iconic heading like Collection; Organize; Cite; Sync; and Collaborate. The description headings are - ‘Grab your research with a single click’; “It has never been easier to sort your research”; “You’re never more than a click away from a bibliography”; “Your data is always where you need it”; “Work together and share with the world”. Under each of the previous listing is

the following direction provided to the user: They are “A personal research assistant”; “Say goodbye to folders”; “Cite”; “Research everywhere”;and “Works well with others”. The images of these tasks are indicated in Table 1 and row three [2].

Next step to follow is the sub tasks such as “Store anything”; “Tag it “; “Always in style”; “Painless data transfer”; and “Share with the world or not”.The images of all these tasks are shown in Table 1 and row five.



The image shows a screenshot of the Zotero website homepage. Four orange callout boxes are positioned above the website content, with arrows pointing to specific elements on the page:






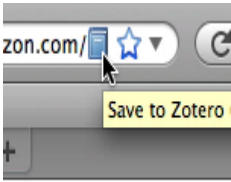
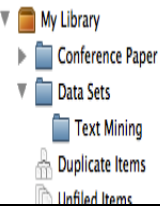
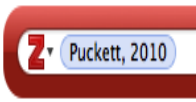
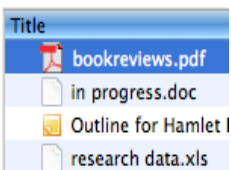
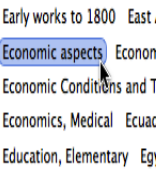
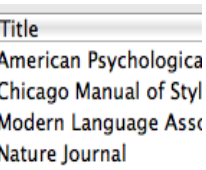
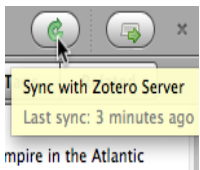
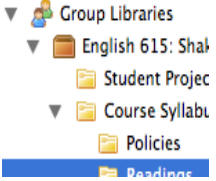
- Download Now:** Points to a red button labeled "Download Now" in the top right section.
- Search Support:** Points to a search bar labeled "Search support" in the navigation menu.
- Upgrade Storage:** Points to a blue button labeled "Upgrade Storage" in the top right corner.
- Log In. Register:** Points to a blue button labeled "Log In + Register" in the top right corner.

The website content includes the Zotero logo, navigation links (Home, Groups, People, Documentation, Forums, Get Involved), a search bar, and several main sections: "Grab your research with a single click.", "A personal research assistant.", "Store anything.", "Follow Zotero on Twitter", "Zotero News", "Get Involved", and a footer with contact information and funding sources.

Further at the bottom of the home page there are three important headings relating to the use of Zotero. They are social networking tools like twitter Follow Zotero on Twitter; face book; Find Zotero on Facebook; and subscribe

to Zotero Blog ; Zotero News; Get Involved. At the bottom most part of the home page is the information about brief history of Zotero and the Logo of the developers of Zotero.

Table 1: Icons of the Various Utility Features in the Home Page of Zotero.

S/N	Collect	Organize	Cite	Sync	Collaborate
1					
2	Grab your research with a single click	It has never been easier to sort your research.	You're never more than a click away from a bibliography.	Your data is always where you need it.	Work together and share with the world.
3	A personal research assistant. 	Say goodbye to folders. 	Cite perfectly.  ¹ "Beta blockers?" <i>Nature</i> 45 ² Jason Puckett, "Superpower 2010": 70-97.	Research everywhere.	Works well with others.
4	Store anything.	Tag it	Always in style	Painless data transfer.	Share with the world. Or not.
5		Early works to 1800 East.  Economic aspects Econon Economic Conditions and T Economics, Medical Ecuac Education, Elementary Egi		 mpire in the Atlantic	

Source: <https://www.zotero.org/>

Step 3
Zotero for Firefox

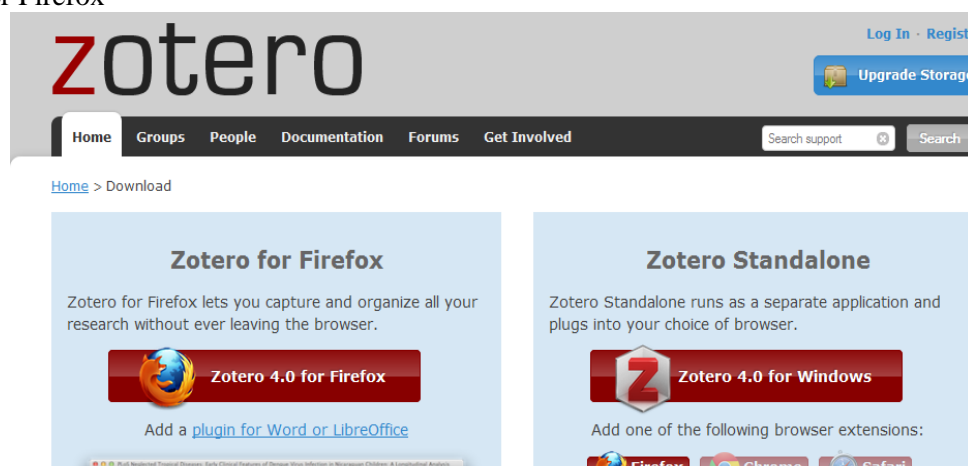


Fig. 3: Zotero Shows Two Windows.

In Figure 3 it may be seen that after clicking download icon of Zotero, two windows will appear both sides in left and right. Left side indicates - download for Firefox browser and right side of the icon shows several options. In this there are three browsers namely Firefox, Chrome and Safari and the user can choose

any one of them [3]. The above screen shot (Figure 4) indicates that downloading of ZOTERO software in Firefox browser and showing a small window to allow for downloading ZOTERO software, in case user clicks on the allow button it automatically starts downloading.

Step 4

The process of requesting to click on “allow button” to download

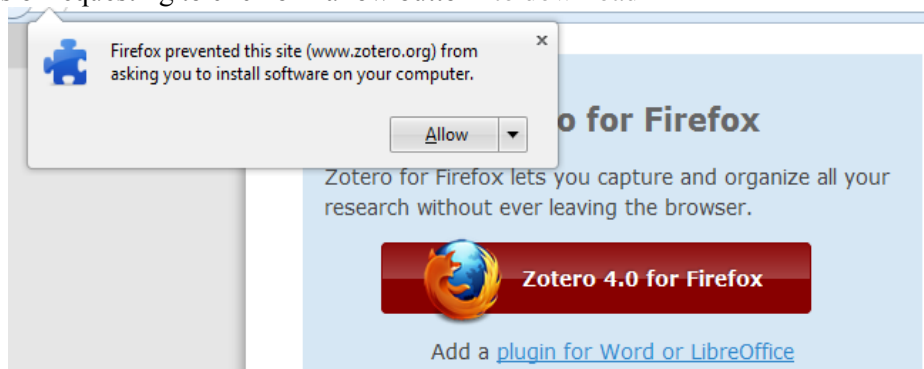


Fig. 4: Process of Requesting to Click on “Allow Button” to Download

Step 5

Downloading Processing

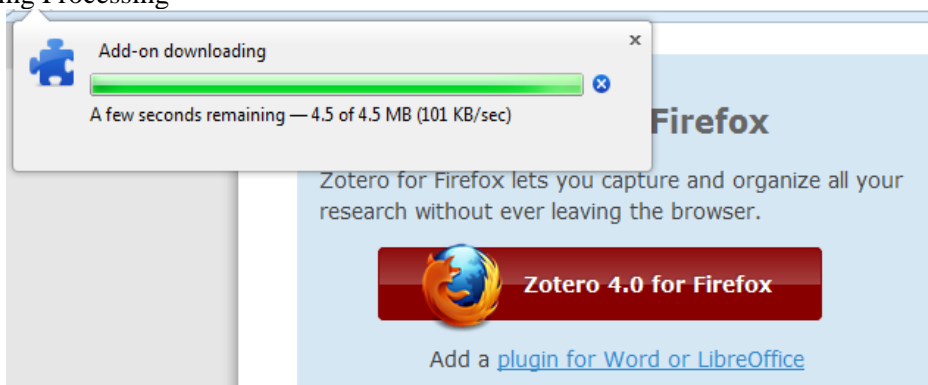


Fig. 5: Downloading Processing.

The above screen shot (Figure 5) shows the process of downloading of Zotero software, which the user can confirm by looking at green colour buffering. In the above screen shot

(Figure 6) of the Zotero software downloading is indicating the process of the final setup of downloading. Here, the installation will be done by clicking on the “Install Now” button.

Step 6

The final set up of the software installation

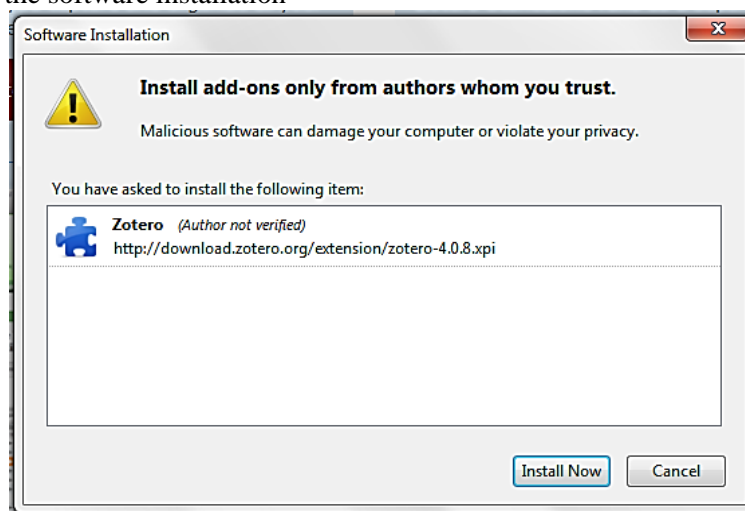


Fig. 6: Final Setup of the Software Installation.

Figure 7 shows the process of final setup to install Zotero software. If the user clicks on the “Restart Now” button then it automatically gets installed on the computer. It may be observed in step 8 (Figure 7) that after completing installation process of Zotero

software, the user has to visit again the home page of Zotero website to install Plug-in for word of LiberOffice. It enables to work with Microsoft word therefore user has to click on the underlined Plug-in for word of LiberOffice.

Step 7

The process of final setup to install Zotero software.

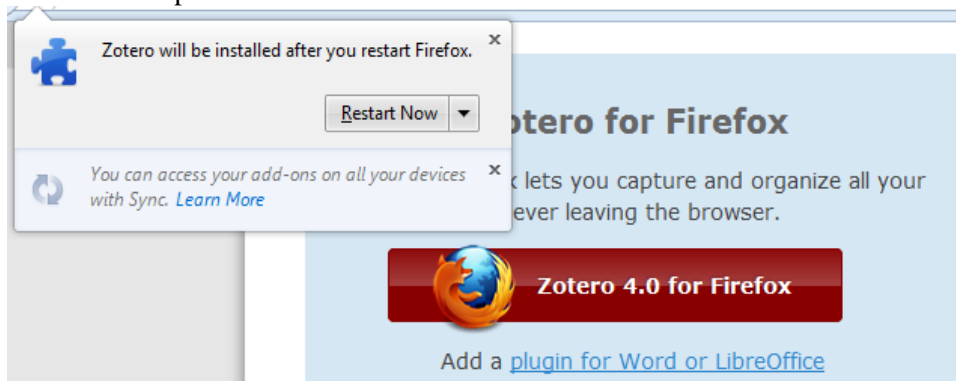


Fig. 7: Final Setup to Install Zotero Software.

Step 8

Plug-in for word of LiberOffice.



Fig. 8: Plug-in for Word of LiberOffice.

Step 9

Word Processor Plug-in Installation



Microsoft Word

Windows

The latest version of the Word for Windows plugin for Zotero 3.0+ is **3.1.12** (compatible with Word 2003-2013 excluding Word 2010 Starter Edition, and Firefox 17-20).

- Install [Word for Windows Plugin 3.1.12](#) (Firefox extension)

Mac

The latest version of the Mac Word plugin for Zotero 3.0+ is **3.5.7** (compatible with Word 2004-2011 and Firefox 4 or later).

- Install [Word for Mac Plugin 3.5.7](#) (Firefox extension)

Word 2008 users: Zotero functionality is located under the Word script menu. See [here](#) for more details.

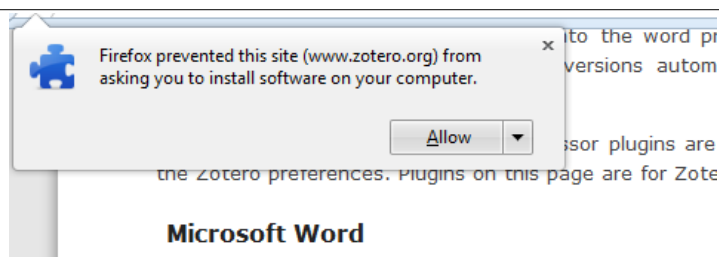


Fig. 9: Word Processor Plug-in Installation.

The above screen shot of step 9 (Figure 9) is showing the overall process to enable to work with Word. The user tends to seek certain aspects which are shown in the above Zotero home page. So user has to click on underlined

“Windows Plug-in 3.1.12.” After clicking this, automatically a small widow will appear; then user has to click on the “Allow” button for installation.

Step 10

Zotero Word for Windows integration.

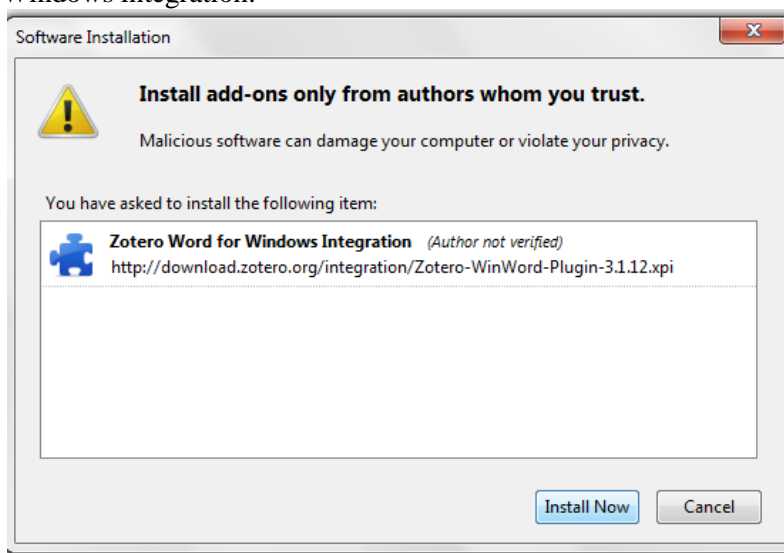


Fig. 10: Windows Integration.

The above screen shot of step 10 (Figure 10) of the Zotero Word for Windows Integration is indicating the process of the final setup of

downloading. Here, the installation will be done by clicking on the “Install Now” button.

Step 11

In step 11(Figure 11) the process of restart of Zotero word for Windows integration is seen

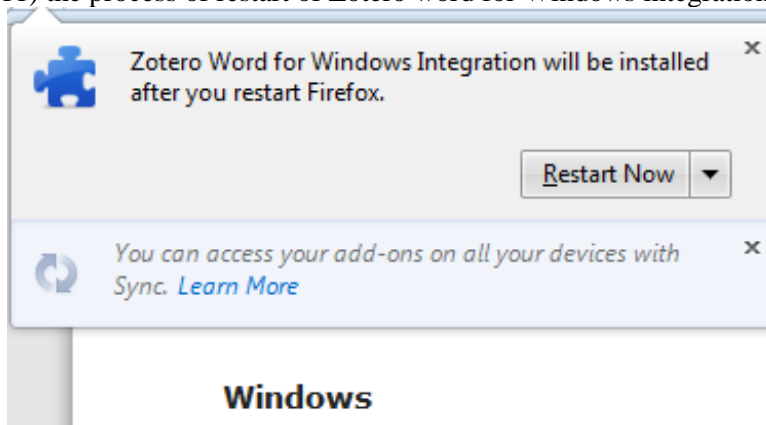


Fig. 11: Installation of Zotero Word for Windows Integration.

The above picture (Figure 11) indicates that the process of final set up to install Zotero word for Windows integration. User can install

by clicking on the “Restart Now” button; then it automatically gets installed on the computer.

Step 12

Screen shot of step 12 (Figure 12) of Zotero Software shows how it looks in the system after installation is over.



Fig. 12: Screen of Zotero Software as in System after Installation.

The above screen shot (Figure 12) is indicating display screen of the Zotero software as in the system after installation from the Zotero website. For more information user has to click on underlined “Quick Start Guide.” Then it shows enough information about the

software. When the user is working with Firefox browser to open Google Scholar in the address box, a small icon will appear if the user has installed Zotero software on his PC [4, 5]. Thus there are 12 steps in the installation of Zotero.

WORKING WITH ZOTERO SOFTWARE USING ONLINE DATABASES AND ONLINE DIGITAL LIBRARIES

Following para indicate how to work on Zotero with the help of an example. The screen shot of step 2.1. (Figure 13) is showing how to work with Zotero software on JSTORE

digital library to get bibliographic details of the selected items. If you are on a page of search results with many items, you will see a folder icon. Click this to get a list of all the items on the page and click off the ones you want to save.

Step 2.1

Working with Zotero Software on JSTORE Digital Library.

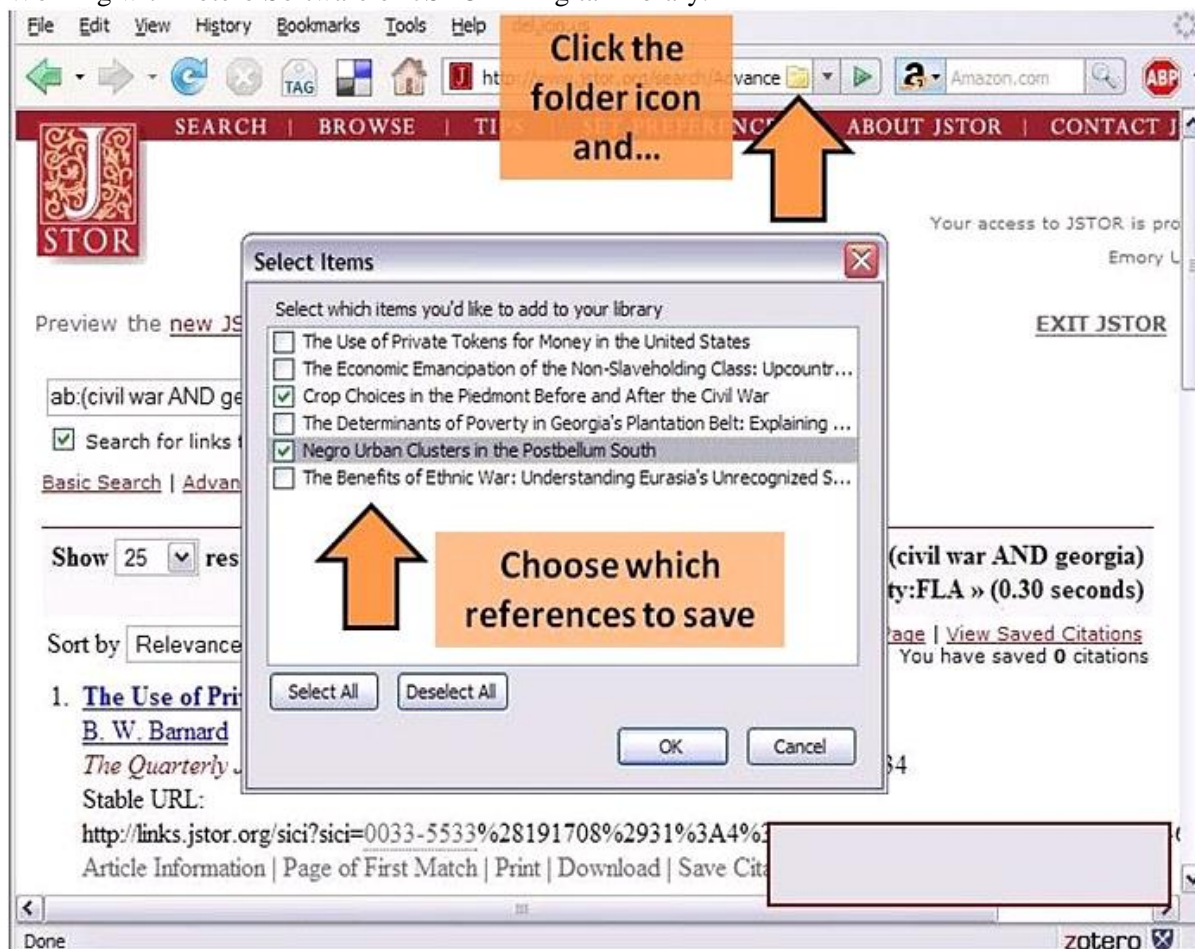


Fig. 13: Working with Zotero Software on JSTORE Digital Library.

Step 2.2

Collecting the Reference: Other Websites.

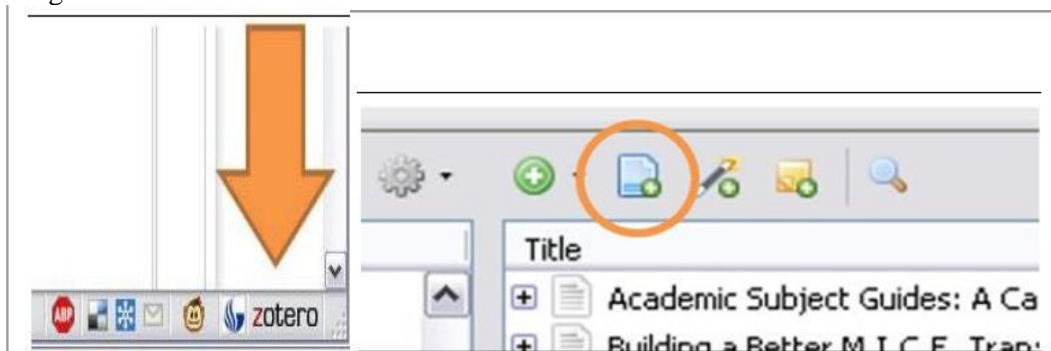


Fig. 14: Collecting the Reference: Other Websites.

A look at the step 2.2 (Figure 14)shows that Zotero cannot automatically capture citation info from some web pages, but you can still add them to your Zotero library. Click the Zotero button at the bottom of your browser to access Zotero’s controls. Click the page button (to the right of the green plus sign) to save a link to the page. This will save a new “web

page” item to your library. You can add information about the author, etc., if you wish. This will also attach a snapshot of the page to the citation. Taking a snapshot saves a copy of the page to your computer. It includes the page’s text and images, so if the page is removed later, or if you are offline, you will still be able to view your copy.

Step 2.3
Attaching Files.

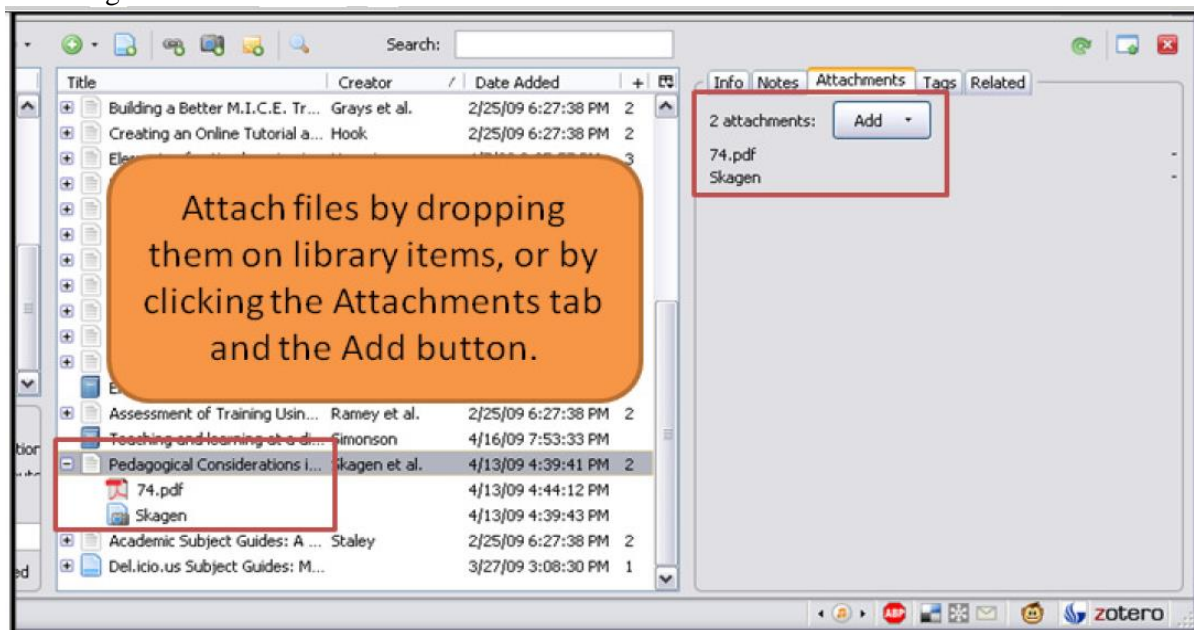


Fig. 15: Attaching Files.

The above screen shot of step 2.3 (Figure 15) is showing how it is easy to attach files (like PDFs) to items in your Zotero library. Just drag the file into your Zotero pane. Dropping a file onto a collection, or in between library items, will copy it into your library as a standalone item. Dropping it onto an existing

item will attach it to that item. This is the easiest way to attach a copy of an article to its entry in your library. Each item also has an attachments tab in the right column. You can attach files by clicking the attachments tab and then the add button.

Step 2.4
The Process of Organizing the Library.

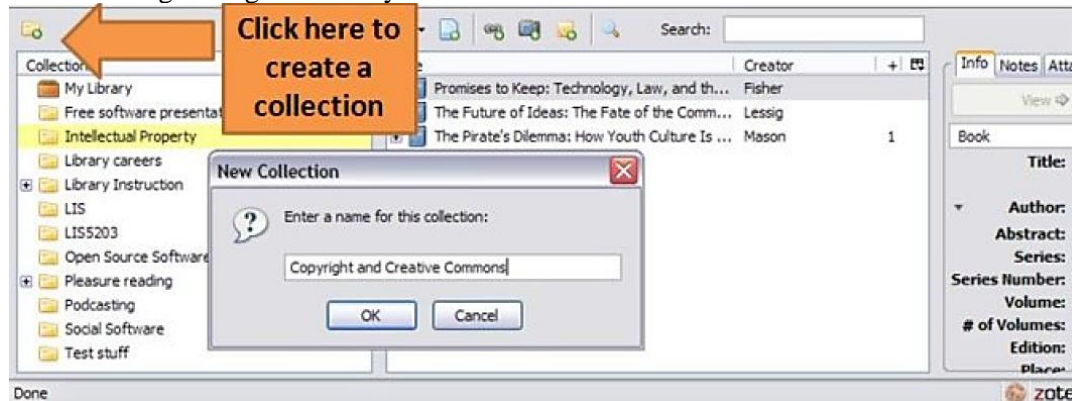


Fig. 16: Process of Organizing the Library.

The above screen shot of step2.4.(Figure 16) is guiding how to name the selected items which are in Zotero software after citing from the websites or online databases, when you click the Zotero button at the bottom of your browser to open your library. At the top left is a Folder button with a green plus sign. Click this to create a new “collection.” Create collections to organize your references.

Collections are like file folders on your computer, but a reference can be in more than one collection at a time. In other words, a book on the Civil War could be filed in your “Civil War” collection, your “Georgia History” collection and your “19th Century America” collection without having to make three copies of the reference.

Step 2.5

The process of converting bibliographical details into reference style of the selected item from Zotero software.

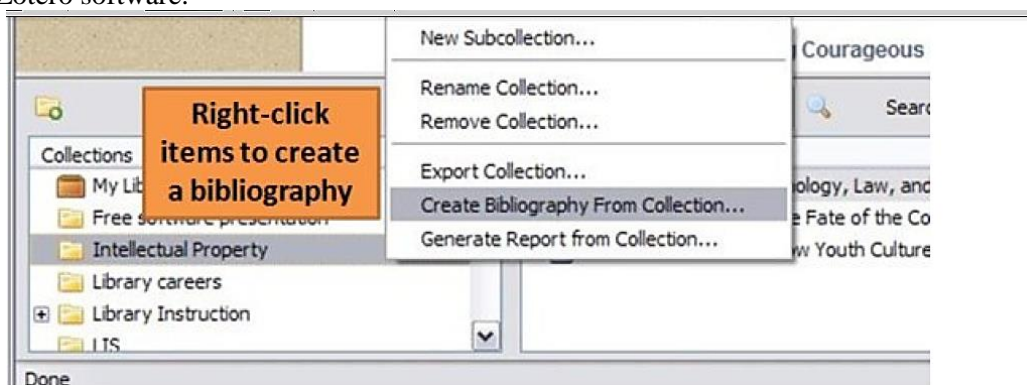


Fig. 17: Process Converting Bibliographical Details into Reference Style.

The above screen shot of step 2.5. (Figure 17) is indicating the process of converting bibliographical details into reference style. The user has to select the references or collections which he wants to include. Hold the control key and click to select multiple items. Right-click one of the selected items and choose

“Create Bibliography”. Choose the bibliographic style which you want, select Copy to Clipboard, click OK and paste into your word processor. This method works with any word processor (or anywhere you can paste text).

Step 2.6

Creating bibliography while working with Microsoft Word.

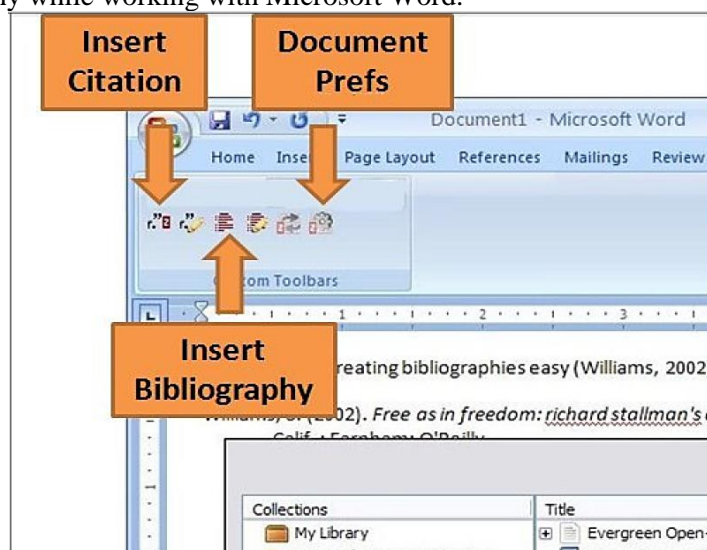


Fig. 18: Creating Bibliography while Working with Microsoft Word.

The above screen shot of step 2.6 (Figure 18) is showing how to make use of the Zotero software to get different kinds of details of bibliographies while working with Word which is stored in Zotero software. Zotero offers word processing plugging for Word and Open Office. The plug-in adds a Zotero toolbar to your word processor that allows you to add citations to your document while you write. To add a citation, click the first button (Insert Citation) on the toolbar. Search for the reference you want to cite and press Enter. Zotero will add the citation at your cursor. At the end of your paper, click the third button (Insert Bibliography). Your bibliography will appear, and new citations will be added automatically. Change bibliographic styles with the last button on the toolbar if necessary (Set Doc Prefs).

CONCLUSION

Zotero is a research reference tool that automatically senses content, allowing you to add it to your personal library with a single click. Whether you are searching for a preprint on arXiv.org, a journal article from JSTOR, a news story from the New York Times, or a book from your university library catalogue, Zotero has you covered with support for thousands of sites. Store anything. Zotero collects all your research in a single, searchable interface. You can add PDFs, images, audio and video files, snapshots of

WebPages, and anything else. Zotero automatically indexes the full-text content of your library, enabling you to find exactly what you are looking for with just a few key strokes.

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