

Instruction Guide: Managing Research Information With Zotero

Created by Michael Witt (mwitt@purdue.edu), Assistant Professor of Library Science, Purdue University Libraries – revised: September 16, 2010



This instruction module can be delivered by the instructor presenting the activities (45-60 minutes total time) or with students interactively performing the activities in pairs or small teams in a computer lab (90-120 minutes). Approximate timings below are for an interactive session, which is the preferable method. Discussion questions are in italics.

I. Introduction (5 min.)

Think of the last big paper you wrote. How many articles did you cite? How did you manage all of those references and articles?

By taking an hour or two to learn how to use citation management software now, you will improve the efficiency of your research and save hundreds of hours with the papers you'll write in the future.

II. How does Zotero work? (10 min.)

Rather than giving a wordy explanation about how citation managers work, let's run through a quick demonstration. Consider this to be a preview. Don't worry about taking notes right now, because we'll slow down and go through everything again, step by step, later in the session.

The instructor quickly demonstrates how to capture a citation from an article on the web, insert it into a Word document, and add a bibliography to a document.

III. Adding citations (20 min.)

Ask for examples of websites that students use in their research (write down 5-10 on a whiteboard). Show how to access the Libraries' list of databases and use it in the discussion. Also include Wikipedia and Google Scholar.

Activity #1: Add citations from searches of each source from the whiteboard based on the students' individual interests. Use three methods for adding citations: Save to Zotero, Create New Item From Page, and New Item. For each item, attach a snapshot of the web page, use

the Locate button to find its full-text, and then attach the full-text file. The result should be 5-10 items in My Library in Zotero.

IV. Organizing and Enhancing Citations (15 min.)

Activity #2: Create folders and subfolders and organize items into them. Review and edit citations (look for errors). Enhance citations by adding notes, tags, and at least one relationship. Experiment with searching and browsing the items.

Ask students about what approach they took to organize their research information and how they implemented it in Zotero.

V. Inserting Citations Into a Document (20 min.)

Activity #3: Create a Word document. Copy and paste or create “Lorem Ipsum” text. Insert all citations into the text. Create a bibliography. Move three citations. Refresh bibliography. Change style and refresh again. Remove Zotero codes and save document.

VI. Storing and Sharing Citations Online (20 min.)

Activity #4: Create an account at Zotero.org. Create a private group and synchronize it with a collection. Create a “public, closed membership” group and invite a classmate to join it. Add at least one citation another classmate’s group. Delete groups.

VII. Downloading and Installing Zotero (5 min.)

Explain the two software components: the Zotero browser plug-in and the word processor plug-in.

Show video, “Meet Zotero: Setup”, <http://www.zotero.org/support/installation>.

VIII. Conclusion

Show libguide on Zotero and briefly explain alternatives (EndNote, Mendeley, etc).

Handout: matrix that compares EndNote, EndNoteWeb, Mendeley, and Zotero.

Solicit questions and evaluations.