

Zotero for individuals and groups

A guide to basic and advanced features

Created by: Nele Noppe

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5. **Share references:** Collaborate on gathering and processing sources
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7. **Workshop slides:** Useful slides when using this guide in a workshop/training (introduction, workshop plan, discussion prompts)

Zotero basics and setup



Zotero is the right tool to...

1. **Gather references**: Add citation information about, and copies of, scholarly sources
2. **Process references**: Organize, search, and annotate sources
3. **Use references in writing**: Add flexible references and bibliographies in your favorite word processing tools
4. **Share references**: Collaborate on gathering and processing sources

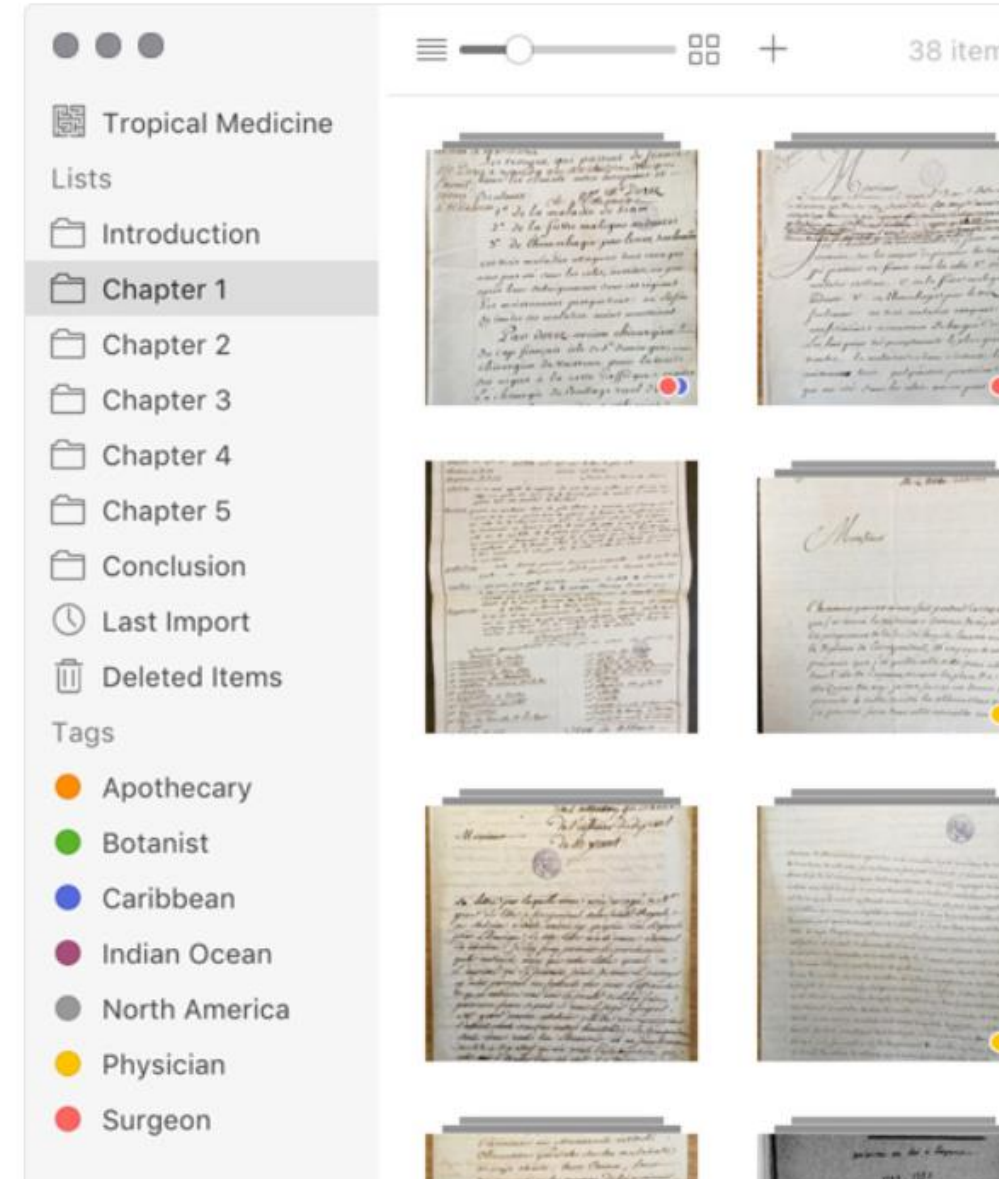


What does Zotero cost?

- Zotero is open source and free to use
- Yearly costs are only for file storage of attachments (PDFs, etc.)
 - 300MB free, 2GB \$20, 6GB \$60, unlimited storage \$120
 - Zotero groups use the storage subscription of the group owner. Group members do not pay for storage used by the group, only for storage used by their own personal Zotero libraries
 - If you choose not to synchronize files to your online Zotero account, you will not use file storage
 - If you accidentally exceed your storage limit, you will get a warning and the new files will not be synced. Zotero will not charge you automatically

Zotero sister projects

- Project of the Roy Rosenzweig Center for History and New Media
- Sister projects of Zotero
 - Tropy <https://tropy.org/>
 - Omeka <https://omeka.org/>
- Why use these tools?
 - Open source and not for profit
 - Easy export
 - By and for researchers
- If you work with legal materials or want to save citations in multiple languages: Juris-M





Information, help, inspiration

- [Zotero Quick Start Guide](#)
- [Zotero documentation](#)
- [Zotero forums](#)
- [Tips and tricks](#)
- For inspiration: [Zotero plugins](#)
- [Zotero news and how-to's](#) on the blog of the Artes Research Team
- Explore Zotero menus and the Preferences pane, experiment!


Thank you!

Basic Zotero setup (1)

You need:

- **The Zotero desktop application**, to work in
- **The Zotero plugin for your browser**, to gather references
- **A Zotero account**, to synchronize your references to the web interface and to participate in Zotero groups
- The Zotero web interface is mainly useful for displaying references openly. The desktop application has much more functionality
- Zotero has numerous plugins that are optional, but greatly expand the functionality of the program

Basic Zotero setup (2)

1. From <https://www.zotero.org/download/>, download and install the Zotero desktop application.
2. From the same page, install a browser plugin (Zotero Connector).
3. In the Zotero desktop application, go to Edit > Preferences > Sync and enter your Zotero account details to sync Zotero data to your online account.
4. To join a Zotero group, log in to the Zotero website in your browser, go to the group URL, and request to join. Depending on the group setup, you will be admitted automatically or after a group admin approves the request.
5. Minimum recommended plugins: Word processor plugin, Zotfile for easier file management
 - Zotfile (download via <http://zotfile.com>, install via Zotero app > Tools > Add-ons >  > Install add-on from file)
 - Plugin for your preferred word processor (install via Zotero app > Edit > Preferences > Citation tab)
6. Done!

Optional: play in our Zotero sandbox

- The [Artes Digital Scholarship Community](#) is a Zotero group full of resources on digital scholarship for [KU Leuven](#) researchers, students, and staff, curated by the [research team of the library of the Faculty of Arts](#).
- To join the group, simply log in with a free Zotero account and click the "Join" button. When you join, you can add your own resources, see the content of attachments, and search this group right from your own Zotero desktop client. If you're not a group member, you can still browse and search the content of the group.
- The group also contains a “Sandbox” folder where you can change anything you like while you try out Zotero.

Gather references

Add (meta)data about, and copies of, scholarly sources



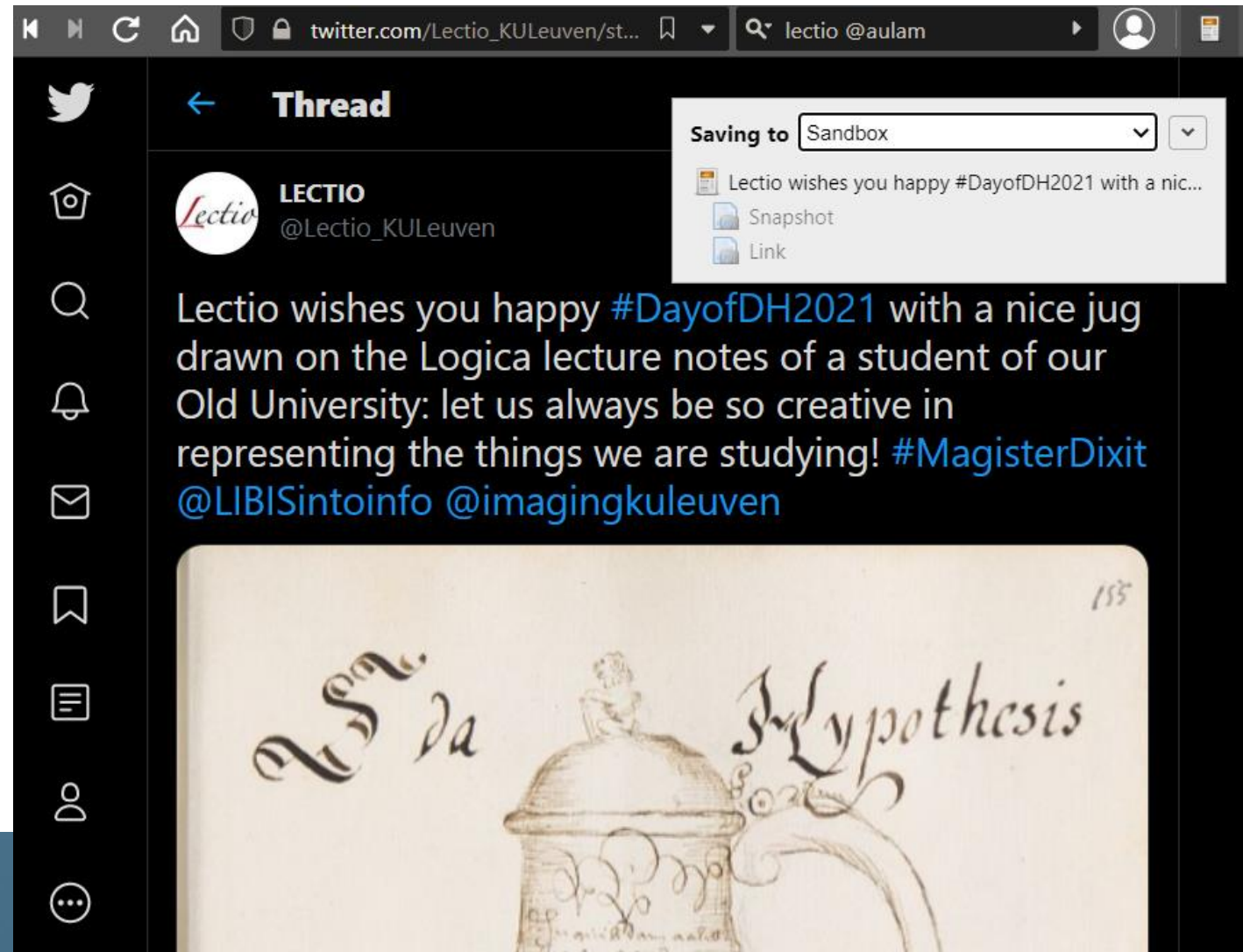
How to get materials into Zotero

1. From online sources, using the browser plugin
2. From files on your computer
3. From your existing bibliographies
4. From Zotero groups that you join
5. From RSS feeds



1. Get references from online sources

1. Using the browser plugin, Zotero can pull citation metadata about sources directly from web pages into the Zotero desktop app
2. Works with academic publications and other types of sources, including standalone PDFs, websites, social media, ...





Result: Metadata and copy of item (web page snapshot or PDF) appear in Zotero

Screenshot of the Zotero application interface showing a search result for "lectio".

The search bar at the top contains the text "lectio".

The main table displays the search results:

Title	Creator	Item Type	Size
Lectio wishes you happy #DayofDH2021 with ...	LECTIO	Blog Post	20...
Link		Attachment	
Snapshot		Attachment	

The right sidebar shows the details for the selected item, "Lectio wishes you happy #DayofDH2021 with ...":

- Item Type: Blog Post
- Title: Lectio wishes you happy #DayofDH2021 with a nice jug drawn on the Logica lecture notes of a student of our Old University: let us always be so creative in representing the things we are studying! #MagisterDixit @LIBISintoinfo @imagingkuleuven <https://t.co/2bWSJTVUEG>
- Author: LECTIO
- Abstract: @Lectio_KULeuven
- Blog Title: @Lectio_KULeuven
- Website Type: Tweet



In-depth: Saving references from online sources with the browser plugin

1. How to save references
 1. Click the Zotero icon to save a reference
 2. Choose where you want to save the reference
 3. If Zotero detects multiple references on a page, select which you want to save
2. Where does this work?
 1. **Academic publications:** Websites of journals, publishers, libraries, other academic platforms (data repositories like Zenodo, academic search engines like Google Scholar, etc.)
 2. **Other types of sources:** Web pages, YouTube videos, social media posts, etc.
3. What information does Zotero pull into the app?
 1. **Metadata needed for citation** (author, title, abstract, publication year, etc.)
 2. **Copies of the references**, if available (PDFs of academic publications, HTML snapshots of web pages or social media posts)
 1. Zotero integrates with Unpaywall to automatically find and save open access copies of papers across the Internet, not just on the current page
 2. You can add the latest downloaded file to a Zotero item as an attachment (requires Zotfile)



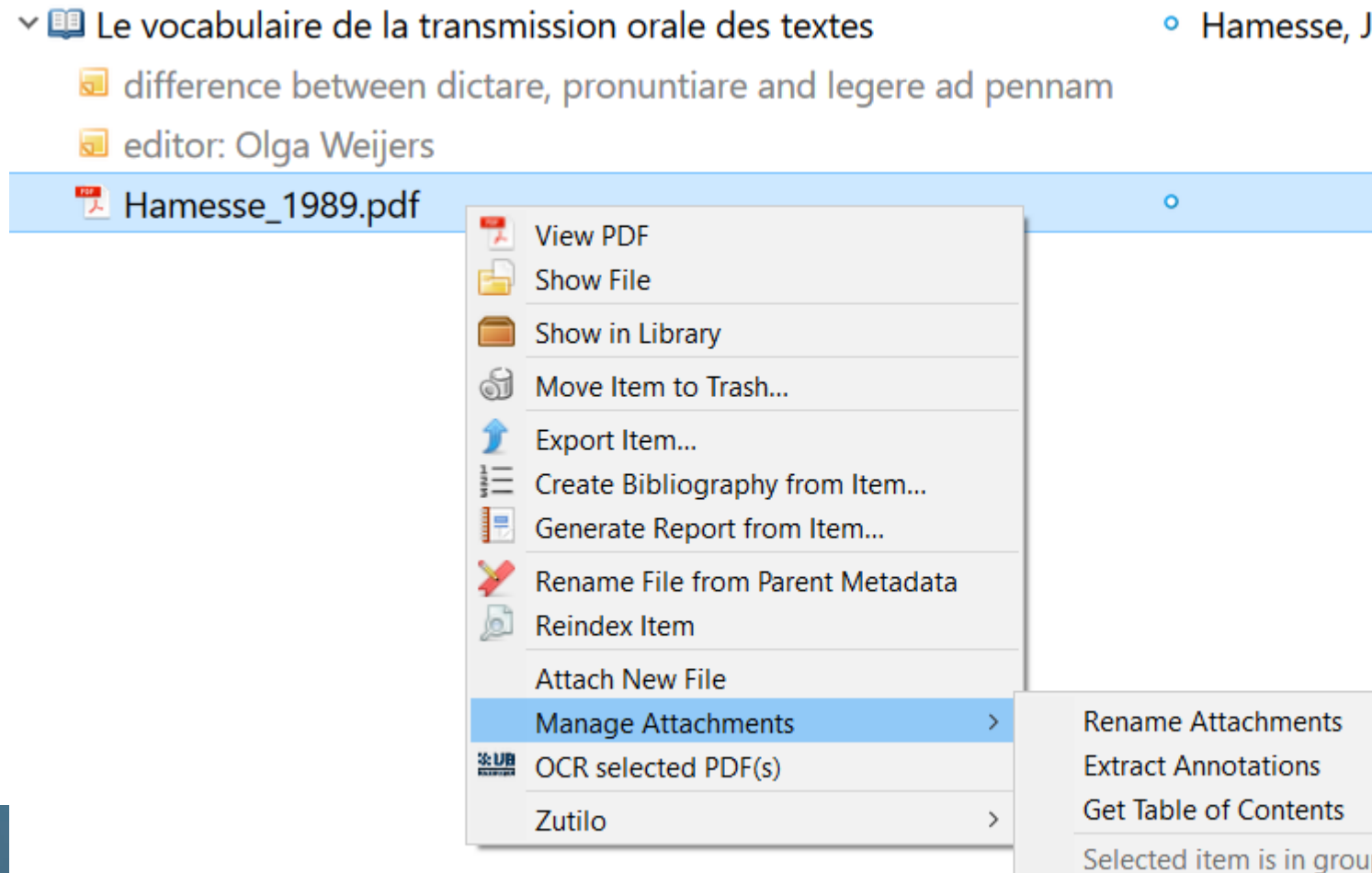
2. Get references from files on your computer

- Any file of any format can be added to Zotero via drag and drop
- Drag single or multiple PDFs into Zotero
- Use Zotero functionality to manipulate PDFs (see next slide)







Some things Zotero can do with PDFs

- (Functionality may require plugins)
- Save, open, and annotate in Zotero
- Rename to consistent, tidy file names from parent metadata
- Index file content and do full-text search
- Apply OCR (optical character recognition) to make PDFs searchable
- Extract existing annotations made in other programs



Installing Zotero plugins

- Zotero has a very wide range of plugins that add extra functionality and connect Zotero with other software and platforms.
- To find and install plugins, follow the (simple) instructions at <https://www.zotero.org/support/plugins>


-  [PDF Translate](#), by windingwind
 - Provides PDF translation for the built-in PDF reader
-  [ZoteroPreview](#), by dcartertod
 - Adds a preview tab with a citation preview for the
-  [Zotero QuickLook](#), by Mikko Rönkkö
 - Zotero plugin adding QuickLook functionality to Zo
-  [Zutilo](#), by Will Shanks
 - Adds additional editing functions and exposes Zote

Library Analysis/Visualization

-  [Cita](#), by  [Diego de la Hera](#) and  [WikiCite](#).
 - Adds citation metadata support, with back and extraction from file attachments, and local citation
-  [Zotero Voyant Export](#), by Cora Johnson-Roberson
 - Visualize your Zotero collections using Voyant.
-  [ZotNet](#), by Christy Byrd.
 - Allows you to create network maps of Zotero items

Website Integration

WordPress

-  [Zotpress](#), by Katie Seaborn.
 - WordPress plugin to show Zotero citations on Word

In-depth: Turning PDFs into Zotero items that have structured metadata

- When the PDF has been OCR'd: right-click > Retrieve metadata for PDF automatically searches for and adds the metadata associated with a PDF
 - Condition 1: the metadata for that PDF is already findable online (this is often not the case for rare sources)
 - Condition 2: the PDF is searchable. To make a PDF searchable, apply Optical Character Recognition (OCR). This can be done in an external OCR program or, via a plugin that requires considerable setup, automatically within Zotero. OCR also makes the full text of a PDF searchable from the search box!
- When the PDF has not been OCR'd:
 - Find the source online and save the metadata to Zotero via the browser plugin. This creates a separate Zotero item. Drag the PDF onto the new Zotero item
 - Alternative: right-click on the PDF in Zotero, select "Create parent item," and add the metadata by hand



In-depth: Finding PDF copies of Zotero items you only have metadata of (1)

- Select (multiple) files > right-click > Find Available PDFs automatically searches for and adds the metadata associated with PDFs (via Unpaywall)

Find Available PDFs

1 PDF added

Item	PDF
✗ An archive of whose ow...	No PDF found
✗ What are preprints?	No PDF found
✓ Sustainable and FAIR Da...	Full Text

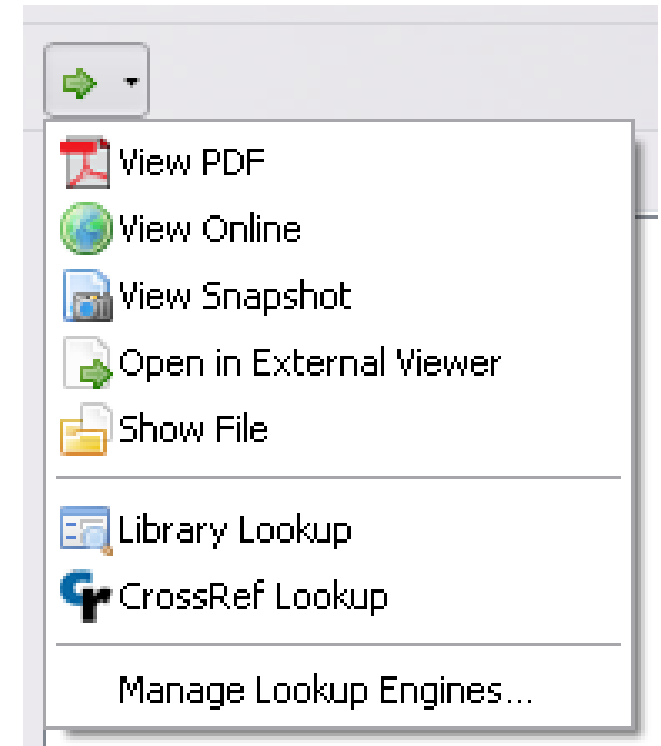
Background items:

- An archive of whose own? White feminism ... Lothia
- Open Access Models, Pirate Libraries and A... Dulon
- What are preprints? :Dialo
- Acader
- Sustain
- One m
- Which
- Fan fic
- Fandor
- Fan Is
- The Open Science Training Handbook Bezjak
- Open Concepts and Principles
- Transforming academic and fan cultures TWC E
- Standardization Survival Kit PARTH
- PARTIAL Pathfinders to Data M Tith



In-depth: Finding PDF copies of Zotero items (2)

- Use the Locate menu (the green arrow at the top right when an item is selected) to find an item in Google Scholar, various libraries, etc.
[Instructions for adding lookup engines](#)



In-depth: OCR of PDFs in Zotero

To enable OCR of PDFs, integrate Zotero with free Tesseract OCR according to the instructions at <https://github.com/UB-Mannheim/zotero-ocr>

- Install Tesseract OCR <https://github.com/UB-Mannheim/tesseract/wiki>
- Install Poppler <https://blog.alivate.com.au/poppler-windows/>
- Check "Overwrite the initial PDF with the output" in the Zotero OCR settings
- Now when you select Zotero items and right-click "OCR selected PDFs", OCR takes place and the original PDF is replaced with OCRRed version
- Now Zotero can at least index the PDF and make it full-text searchable. It may also be able to retrieve metadata, if metadata for the file is available online



3. Get references from your existing bibliographies into Zotero

- Add items by hand
- Add items by identifier (ISBN, DOI, and [others](#))
- Zotero can import bibliographies in structured data formats (BibTeX, RIS, XML export from other bibliography managers, [and more](#))
- If you have a plain text bibliography, for example, in Word, convert that text into structured data so that Zotero can import it



In-depth: Converting a plain text bibliography for import into Zotero

Instructions for converting an existing bibliography to a format Zotero can import:

- Paste the bibliography into <https://anystyle.io/>
- Check the resulting structured data for errors, correct if necessary
- Export the structured data to BibTeX format
- Import the BibTeX file into Zotero (File > Import)
- If desired, have Zotero automatically search for available PDF copies of sources (select Zotero items > right-click > Find available PDFs)



Using Anystyle.io, step 1

1. Parse

Verkerk, P., Ouvrard, Y., Fantoli, M., Longree, D. (2020). L. A.S.L.A. and Collatinus: A convergence in lexic. *STUDI E SAGGI LINGUISTICI*, 58 (1), 95-120. (URL)

Fantoli, M., Vandersmissen, M. (2019). Partitionnements multiples de corpus : une lecture polyangulaire ? L'exemple des bases latines du LASLA. *Corpus*, 19. doi: 10.4000/corpus.4505

Fantoli, M. (2015). Anna, Giocasta, l'Arpia: tre chiavi di lettura de La Tumba de Antigona. *La Critica sociologica*, 196 (4), 69-80. doi: 10.1400/236138

Parse 3 references



Using Anystyle.io, step 2

2. Edit

Author	Verkerk, P., Ouvrard, Y., Fantoli, M., Longree, D.
Date	(2020).
Title	L. A.S.L.A. and Collatinus: A convergence in lexica.
Journal	STUDI E SAGGI LINGUISTICI,
Volume / Issue	58 (1),
Pages	95-120.
Note	(URL)
Author	Fantoli, M., Vandersmissen, M.
Date	(2019).
Title	Partitionnements multiples de corpus : une lecture polyangulaire ? L'exemple des bases latines du LASLA.
Journal	Corpus,
Volume / Issue	19

Assign label



Using Anystyle.io, step 3

3. Save

☐ Use my changes to train the parser!

CSL-JSON

BibTeX






XML

4. Get references from Zotero groups











- When you join a Zotero group, the group library appears in the Zotero desktop application in the left sidebar, under your personal library
- Work directly in the Zotero group (your changes will appear for all group members) or drag references from the Zotero group to your personal Zotero library (your changes will appear only to you)
- Easily exchange items between personal and group libraries

5. Get references from RSS feeds

- Journals, blogs, news sites, other websites, ..., frequently offer RSS feeds of content updates. RSS = "a web feed that allows users and applications to access updates to websites in a standardized, computer-readable format. These feeds can, for example, allow a user to keep track of many different websites" ([Wikipedia](#))
- Zotero libraries, collections, and tags also have RSS feeds
- [Add RSS feeds to Zotero](#) to get updates from sites and add them to a library

>  Digital Humanities
>  Doing Digital Humanities - A DARIAH ...
>  Fan studies bibliography
>  Fan studies bibliography (testing)
>  LIBER Digital Humanities working group

 Feeds
 **Lectio**
 **OpenMethods**

	Cultural Ontologies: the ArCo Knowledge Graph.	Testori	3/11/20...
	OpenMethods Spotlights #2 : Interview with Luise Borek and Canan ...	Tóth-Czifra	2/10/20...
	Programmable Corpora: Introducing DraCor, an Infrastructure for th...	Testori	2/8/202...
	Worthäufigkeiten als Quelle für die Geschichtswissenschaft? – Einbli...	Source	1/7/202...
	Fragmentarium: a Model for Digital Fragmentology	Source	12/17/2...
	Offen, vielfältig und kreativ. Ein Bericht zum Barcamp Data Literacy ...	Source	11/26/2...
	An end-to-end approach for extracting and segmenting high-varian...	Source	11/9/20...
	Networks in the wild: data analysis and visualization with the Vistori...	Testori	10/30/2...
	OpenMethods Spotlights #1: Interview with Hilde De Weerdts about ...	Horváth	10/13/2...
	MARKUS – Comprehensive tool with the needs of non-Latin script u...	Source	10/11/2...

Process references

Organize, search, and annotate sources



Use Zotero to manage your research workflow

- Built-in organization, annotation, and writing features
- Many plugins to fit your workflow

<https://www.zotero.org/blog/zotero-6/>

Zotero 6: Your research workflow, transformed

Posted March 17th, 2022 by Dan Stillman

We're thrilled to announce the release of Zotero 6, the next major version of Zotero and the biggest upgrade in Zotero's history. Zotero 6 introduces an array of new features to transform how you do research, including a completely new way of working with PDFs and notes.

PDF Reader and New Note Editor





Organization options inside Zotero

- Tags, folders (“collections”), subfolders (see next slides for details)
- Scan Zotero for duplicates and merge them
- Scan Zotero for unfiled items (items that have not been sorted into any folders)

- ✓ Artes digital scholarship community
 - > 1. How to use this group (work in progress)
 - > 2. Digital Humanities (DH)
 - ✓ 3. Research Data Management (RDM)
 - > Data management plan writing
 - > RDM by discipline
 - > RDM by material type
 - > RDM inspiration
 - > Topics, tools, training by DMP section
 - ✓ 4. Scholarly Communication
 - Open Access (OA)
 - ✓ Open Science (OS)
 - Open science training
 - > 5. Sandbox (experiment here)
- Duplicate Items
- Unfiled Items
- Trash



In-depth: Tags and folders/collections

- Folders/collections
 - New items are automatically saved into the collection selected at the time
 - One item can be placed in multiple folders by dragging it from one folder to another
 - These copies reflect the same item: changes to one copy are reflected everywhere
 - To **move** a file from one folder to another, first drag it and then delete the original
 - **To see all the collections an item is in, select the item and then hold down the Option (Mac), Control (Windows), or Alt (Linux) key**
- Searching/sorting: Click a folder and then a tag in the tag selector to show only items that match both



In-depth: Tags and folders/collections

- Add tags from the pane to the left, as many as desired
- Assign tags to items and notes separately
- Assign colors to main tags to visualize tag assignments in item lists
- Searching/sorting: Click a folder and then a tag in the tag selector to show only items that match both
- Tip: In Edit > Preferences > General, disable “Automatically tag items with keywords and subject heading” to keep Zotero from automatically pulling in unwanted tags when you save an item via the browser

The screenshot displays the Zotero application interface. On the left, a folder tree is visible with the following structure:

- ▼ PhD Research
 - ▶ A1. Intro – State of the Art
 - Advertising/Marketing/Branding
 - ▶ B1. Chapter: Methodological
 - ▶ B2. Chapters: Case Studies
 - C1. General Notes
 - C2.1 Topic: Anthology Culture
 - C2.3 Topic: Editorship as Authorship

Below the folder tree, a list of tags is shown, each with a colored square icon:

- TO READ (red)
- READ ALREADY (green)
- PURCHASE (orange)
- LOOKS INTERESTING (purple)
- Cornerstone (pink)

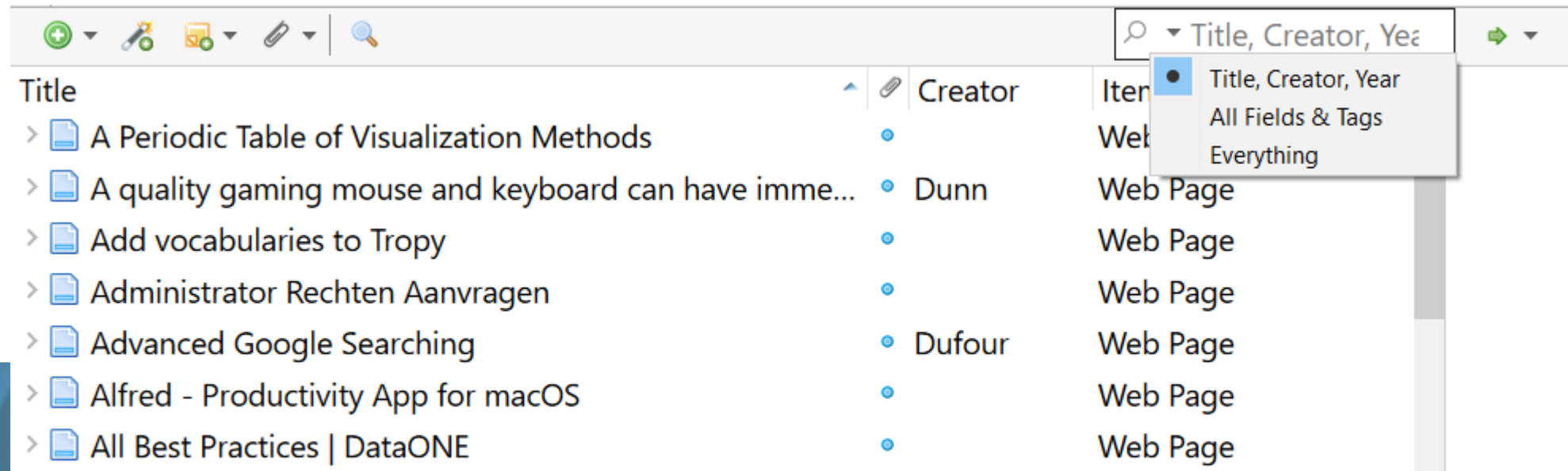
Below the tags, a list of items is displayed, each with a colored square icon and a title:

- ▶ Intro (red)
- Media H (red)
- Disciplin (blue)
- ▶ A diction (blue)
- Assembl (blue)
- ▶ Introduc (blue)
- My moth (blue)
- ▶ Assembl (blue)
- Forms o (blue)
- ▶ Moderni (blue)
- Deleuzia (blue)
- ▶ The spec (blue)
- ▶ The cult (blue)
- ▶ "Strange (blue)
- ▶ Affordan (blue)
- ▶ Forms: v (blue)
- ▶ Multime (blue)
- ▶ Moder (red)
- Theoreti (blue)
- Toward (blue)



Quick search

- Quick search box at the top of the item list:
 - Search in Title, Creator, and Year
 - Search in all metadata and tags (including abstracts and notes)
 - Search in everything, including full text of attachments (works for PDFs that are searchable and plain text files, check that PDF indexing is [enabled in Preferences](#))





Full-text search inside Zotero

- Works on (searchable) PDFs, web page snapshots, plain text files including markdown, notes

The screenshot displays the Zotero application interface. At the top, a search bar contains the text 'lectio'. Below the search bar, a table lists search results. The first result is a 'Blog Post' titled 'Lectio wishes you happy #DayofDH2021 with ...' by 'LECTIO'. The second result is a 'Snapshot' attachment, which is currently selected. To the right of the table, a detailed view of the selected 'Snapshot' item is shown. This view includes the item's filename, access and modification dates, indexing status, and related information. At the bottom of the interface, a rich text editor toolbar is visible, featuring various formatting options like bold, italic, underline, and link.

Title	Creator	Item Type	20...
▼ Lectio wishes you happy #DayofDH2021 with ...	• LECTIO	Blog Post	20...
Link		Attachment	
Snapshot	•	Attachment	

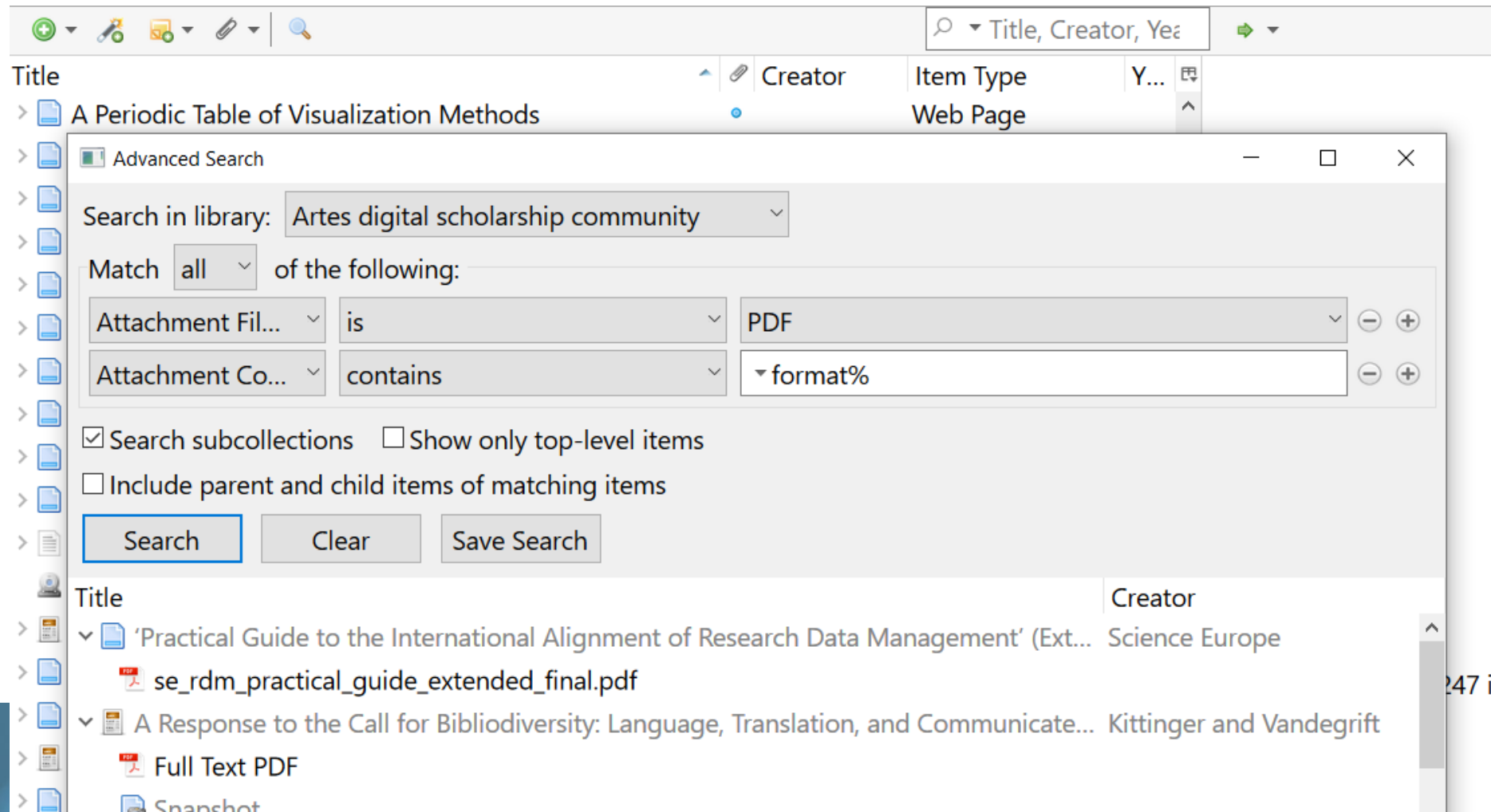
Snapshot
https://twitter.com/Lectio_KULeuven/status...
Filename: 1387774929706307590.html
Accessed: 5/4/2021, 10:06:14 AM
Modified: 5/4/2021, 10:06:14 AM
Indexed: Yes
Related: [click here]
Tags: [click here]

Toolbar: B I U S x₂ x² A A Ix " " " " " "

Advanced search pane: combine search filters to construct complex queries

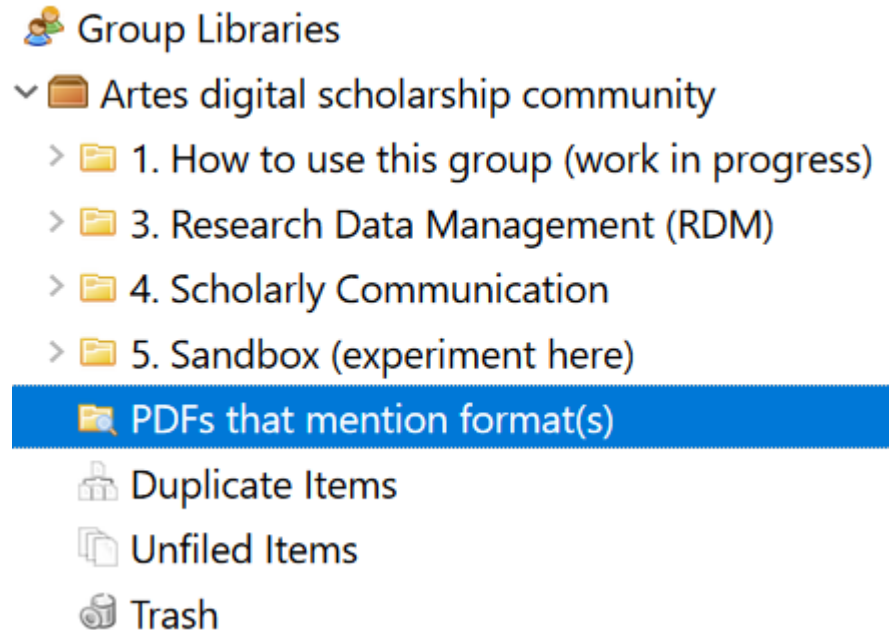
Example: search inside the [Artes Digital Scholarship Community Zotero group](#) for all items with a PDF attachment that contains the word “format(s)”

(% is a wildcard character)



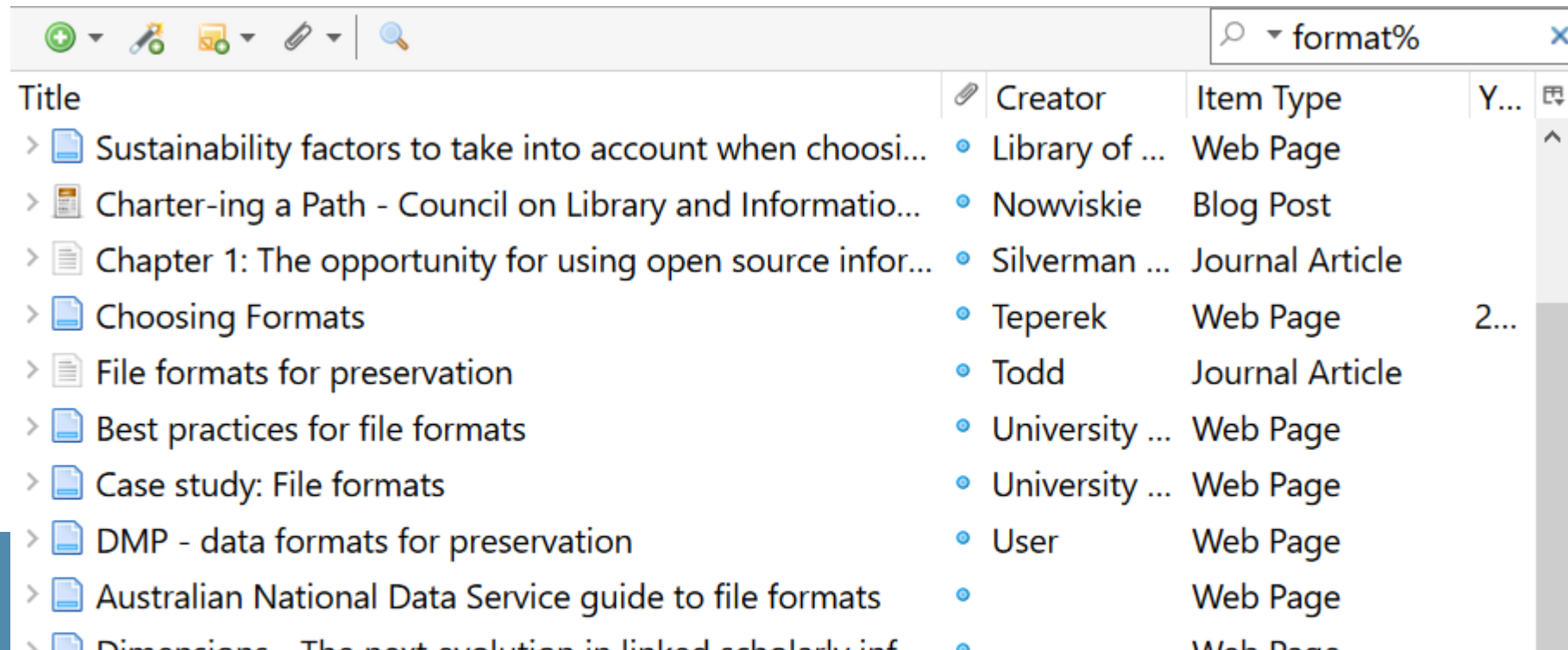
Saved searches

- Any advanced search can be saved to avoid having to reconstruct it over and over
- Saved searches appear as automatically updated folders at the bottom of a Zotero library
- Saved searches can be reused as folders in new quick or advanced searches
- Right-click on a saved search to edit its parameters



Add columns, multiple sort options

Example: sort by items that have an attachment



Title	Creator	Item Type	Y...
> Sustainability factors to take into account when choosi...	Library of ...	Web Page	
> Charter-ing a Path - Council on Library and Informatio...	Nowviskie	Blog Post	
> Chapter 1: The opportunity for using open source infor...	Silverman ...	Journal Article	
> Choosing Formats	Teperek	Web Page	2...
> File formats for preservation	Todd	Journal Article	
> Best practices for file formats	University ...	Web Page	
> Case study: File formats	University ...	Web Page	
> DMP - data formats for preservation	User	Web Page	
> Australian National Data Service guide to file formats		Web Page	
> Dimensions - The next evolution in linked scholarly inf...		Web Page	



Notes in Zotero

- Add rich-text notes to references
- Add standalone notes not connected to particular references
- Zotero notes can have their own tags and are searchable

The screenshot displays the Zotero application interface. At the top, there is a search bar with the text "Title, Creator, Year" and a green arrow icon. Below the search bar is a table of references. The table has columns for "Title", "Creator", "Item Type", and "Year". The first reference is "Archiving complex anthropological data ten years after..." by Caplan, with a "Web Page" item type. It has three sub-items: "In the process of preparing the data for archiving, Pa...", "It was therefore not just a question of changing their ...", and "Snapshot". The second reference is "Negotiating complex anonymisation requirements" by Elliott, with a "Web Page" item type. It has two sub-items: "They felt that despite the ethical concerns that some ..." and "They found the biggest challenge to archiving was th...". The third reference is "Balancing teens' privacy with desire to share data" by Henderson, with a "Web Page" item type. The fourth reference is "Inspiring Minds: Open Data in Practice: success stories ..." by Myers, with a "Blog Post" item type. The "They found the biggest challenge to archiving was th..." note is selected, and its rich-text editor is open on the right. The editor shows two paragraphs of text. The first paragraph is "They found the biggest challenge to archiving was the anonymisation process." The second paragraph is "The research team had always planned to anonymise the interviews they collected, but had not considered how time-consuming it would be to do this."

Title	Creator	Item Type	Year
Archiving complex anthropological data ten years after...	Caplan	Web Page	
In the process of preparing the data for archiving, Pa...		Note	
It was therefore not just a question of changing their ...		Note	
Snapshot		Attachment	
Negotiating complex anonymisation requirements	Elliott	Web Page	
They felt that despite the ethical concerns that some ...		Note	
They found the biggest challenge to archiving was th...		Note	
Snapshot		Attachment	
Balancing teens' privacy with desire to share data	Henderson	Web Page	
Inspiring Minds: Open Data in Practice: success stories ...	Myers	Blog Post	2...

Rich-text editor content:

They found the biggest challenge to archiving was the anonymisation process.

The research team had always planned to anonymise the interviews they collected, but had not considered how time-consuming it would be to do this.



In the new Zotero 6, you can also...

- *“Open PDFs in a new built-in reader within the main Zotero window, in a new tabbed interface*
- *Clean up metadata for items while viewing your PDFs*
- *Mark up PDFs with highlights, notes, and image annotations*
- *Add annotations to Zotero notes with automatic citations, in a powerful new note editor*
- *Cite other items directly in notes using Zotero’s familiar citation dialog*
- *Insert notes into your Word, LibreOffice, and Google Docs documents with active Zotero citations for automatically generating bibliographies*
- *Export notes to external Markdown editors with links back to Zotero items and PDFs”*

PDF annotation in Zotero



AAA test The Rise of Note-Taking ... 2 of 15

Search Annotations

Page 303

Intellectual History Review
ISSN 1749-6977 print/ISSN 1749-6985 online
©2010 International Society for Intellectual History
<http://www.informaworld.com/journals> DOI: 10.1080/17496977.2010.492611

Is the formatting of this correct?

Page 303

Here's a note just for me

Page 303

Taylor and Francis RIHR_A_492611.sgm
10.1080/17496977.2010.492611 Intellectual History Review 1749-6977 (print)/1749-69...

Page 303

Note-taking has probably existed in some form in most literate contexts, but since notes were hardly ever transmitted by repeated co...

Needs more sources

history, notetaking, writing

sponsored scientific expeditions) promoted the ideal of stockpiling notes from one's reading and experience, even if one did not have an immediate use to which to put them, in order to make them available for future use by oneself or by others. As a result we have large collections of notes by early modern scholars and travellers which have survived archived on paper, whether or not they were ever consulted again or used in the composition of published works.

Note-taking has probably existed in some form in most literate contexts, but since notes were hardly ever transmitted by repeated copying, they have not survived when written on temporary or fragile surfaces such as wax tablets or papyrus. On the other hand, when broadly conceived as a close relative of record-keeping, note-taking could include some of the earliest known forms of writing, starting with the stones marked with notches in Mesopotamia to record grain storage and trade (c.3500 BCE) and the clay tablets generated by the administration of the Assyrian empire in the third millennium BCE.¹ Record-keeping by administrations (states and churches) as well as merchants (and, in later periods, lawyers) shifted in the following millennia to new media: first, papyrus from Egypt which was exported throughout the ancient Mediterranean; then parchment, better suited than papyrus (which frays when cut into sheets) to the pages of the codex form which became standard between the second and fourth centuries; and finally paper, introduced from Islam to Southern Europe in the thirteenth century and north of the Alps in the fourteenth century. The interconnection between different kinds of record-keeping and note-taking in different

Warm thanks to Richard Yeo for his energy and leadership in organizing the conference in July 2008 and in initiating this special issue. I am grateful for his friendship, insightful comments and exacting editing throughout our collaboration.

¹ D. Schmandt-Besserat, *How Writing Came About* (Austin: University of Texas Press, 1996); E. Posner, *Archives in the Ancient World* (Cambridge, MA: Harvard University Press, 1972).

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Item Type Journal Article
Title The Rise of Note-Taking in Early Modern Europe
Author Blair, Ann
Abstract The history of note-taking has only begun to be written. On the one hand, the basic functions of selecting, summarizing, storing and sorting information garnered from reading, listening, observing and thinking can be identified in most literate contexts in some form or other. On the other hand, Renaissance humanists emphasized with unprecedented success the virtues of stockpiling notes on large scales and for the long term, thanks to the availability of paper and a new abundance of books, but also to their ability to transmit their own keen motivation to avoid any future loss of learning. We continue to share many early modern ideals for insuring the collection and retrievability of information and have built on early modern practices that facilitate the accumulation and the organization of information, including collaborative work and the use of rearrangeable slips.

Publication Intellectual History Review
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Series Title
Series Text

Inserting PDF annotations into notes (1)

- Annotations inside PDFs can be inserted into notes
- Annotations in notes become full-fledged references:
 - Jump from a note back to the annotation in the context of the pdf
 - Create automatic bibliographies including references from annotations

➡ Write output directly in Zotero notes before moving to Word

Inserting PDF annotations into notes (2)

- In practice:

My Library

Diversification and cu... x

2 of 8

Search Annotations

Page 868

(a)

Page 868

A crow making a basic cut and rip with the bill on the left edge of a section of pandanus leaf with an...

Page 868

Social transmission is the only known transmission mechanism associated with both

Open-source development process

Page 868

Their long (generally 2–3 m), narrow, leathery leaves have strong parallel fibres, which run

Full changelog

Page 869

Figure 2. The 21 sites on New Caledonia's Grande Terre and Maré where we collected tool counterparts from pandanus leaves. Sites are grouped by tool design. Sites where a tool design was associated with more than one site are indicated by a number.

Figure 1. Principal manufacture technique for each pandanus tool design (also see § 2). (a) A crow making a basic cut and rip with the bill on the left edge of a section of pandanus leaf with an action that could be similar to that used in leaf ripping. The ripped strip is held between the bird's mandibles. The bill tip is level with the rip and only the left side of the bill, in this case, makes the short cut in from the leaf edge. The leaf section is ca. 5 cm wide and the leaf-edge barbs face away from the trunk towards the tip of the leaf at right. A wide tool is drawn alongside its counterpart shape on the right edge. Circles below the counterpart indicate when a cut with the bill is made. Numbers inside the circles give the temporal sequence of cuts (see b–d); question marks indicate that the sequence of cuts cannot be inferred. An arrow attached to a circle indicates an associated rip and its direction. (b–d) The same symbols and leaf section as in (a) describe the techniques used to manufacture a narrow tool, a one-step tool, and a three-step tool, respectively. An arrow is missing from the second cut to make a narrow tool (b) because birds make a rip towards the trunk then appear to nip the hanging strip off the leaf before the end of the rip. To form a step on stepped tools (c,d), a crow holds the leaf edge between the mandibles and positions its bill tip close to and above the termination of the previous rip (Hunt 2000a). It then makes a step by cutting the leaf across the fibres with only one side of the tip of the bill before ripping the leaf longitudinally. The body of the tool is held further back in the mandibles and is rarely damaged due to the cutting of steps.

(a)

(b)

(c)

(d)

Figure 1. Principal manufacture technique for each pandanus tool design (also see § 2). (a) A crow making a basic cut and rip with the bill on the left edge of a section of pandanus leaf with an action that could be similar to that used in leaf ripping. The ripped strip is held between the bird's mandibles. The bill tip is level with the rip and only the left side of the bill, in this case, makes the short cut in from the leaf edge. The leaf section is ca. 5 cm wide and the leaf-edge barbs face away from the trunk towards the tip of the leaf at right. A wide tool is drawn alongside its counterpart shape on the right edge. Circles below the counterpart indicate when a cut with the bill is made. Numbers inside the circles give the temporal sequence of cuts (see b–d); question marks indicate that the sequence of cuts cannot be inferred. An arrow attached to a circle indicates an associated rip and its direction. (b–d) The same symbols and leaf section as in (a) describe the techniques used to manufacture a narrow tool, a one-step tool, and a three-step tool, respectively. An arrow is missing from the second cut to make a narrow tool (b) because birds make a rip towards the trunk then appear to nip the hanging strip off the leaf before the end of the rip. To form a step on stepped tools (c,d), a crow holds the leaf edge between the mandibles and positions its bill tip close to and above the termination of the previous rip (Hunt 2000a). It then makes a step by cutting the leaf across the fibres with only one side of the tip of the bill before ripping the leaf longitudinally. The body of the tool is held further back in the mandibles and is rarely damaged due to the cutting of steps.

(Hunt and Gray, 2003, p. 868)

“A crow making a basic cut and rip with the bill on the left edge of a section of pandanus leaf with an action that could be similar to that used in leaf ripping. The ripped strip is held between the bird's mandibles. The bill tip is level with the rip

Show Item Edit Citation Hide Citation

“Social transmission is the only known transmission mechanism associated with both diversification and cumulative change in tool design.” (Hunt and Gray, 2003, p. 868) Open-source development process

“Their long (generally 2–3 m), narrow, leathery leaves have strong parallel fibres, which run longitudinally along their length

Related: Imitation, culture and cognition

Tags: Crow Tools

Using other PDF annotation options together with Zotero

- Change settings so that Zotero opens PDFs in the default PDF reader program
- The Zotfile plugin can extract existing annotations inside PDFs to Zotero notes



Work across devices

- Zotero syncs libraries across devices, for example, between Zotero desktop apps on different computers
- Work in the browser
- Work offline in the desktop app
- iOS app currently being tested



Important note about syncing

- You can move Zotero data, including the database and the attachments, to a different default directory via Preferences.
- **Do not move the Zotero database on a cloud storage service** like OneDrive to sync it between devices. Putting any kind of database on a cloud storage service can lead to data loss. Always use the Zotero sync functionality to sync between devices.

New: Free iOS app



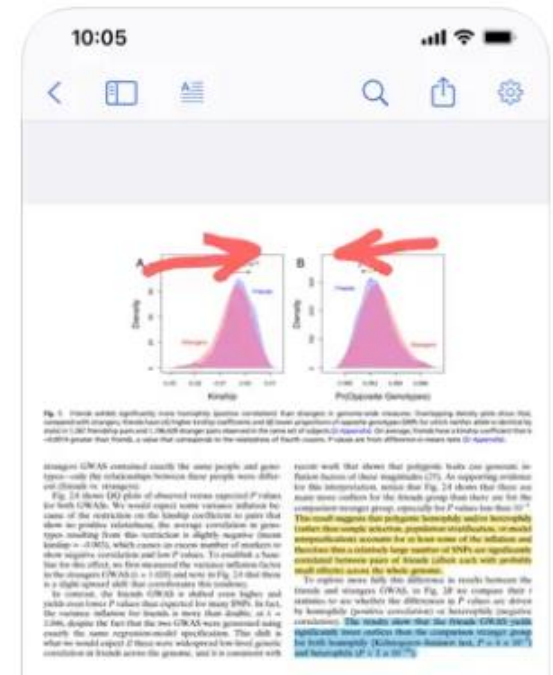
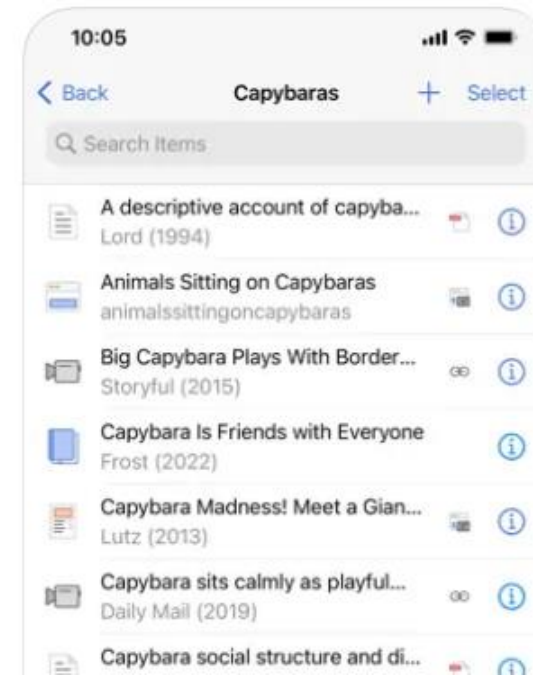
Zotero 4+

Your research assistant
[Zotero](#)

★★★★★ 5.0 • 152 Ratings

Free

Screenshots [iPhone](#) [iPad](#)



Use references in writing

Add flexible references and bibliographies in your favorite word processing tools



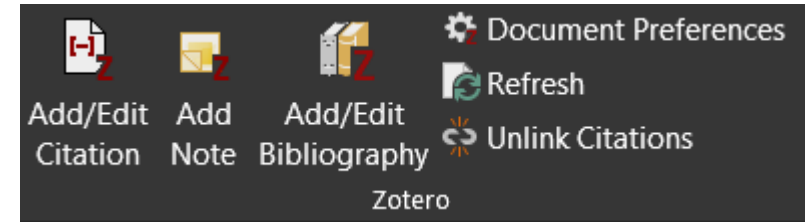
What programs can Zotero interact with?

- Plugins for common word processors: Word, Google Docs, LibreOffice, ...
- Third-party plugins/integration with other writing programs: RStudio, Jupyter Notebook, LaTeX, Atom Editor, markdown, ...
- Workarounds for use in other programs: Usually developed by individuals, search [PROGRAM NAME] AND Zotero
 - Example: How to use Zotero with Scrivener



Example: The Zotero menu in Word


1. Add/Edit Citation: Search for a reference from Zotero and insert it into a text (there are keyboard shortcuts too)
2. Add note: Search for and insert the text of a note
3. Add/Edit Bibliography: Insert an automatically generated bibliography at the end of a text
4. Document preferences: Switch between citation styles, for example, to submit to different journals
5. Refresh: If changes don't appear right away
6. Unlink references: Remove the connections between the references and Zotero. Once you do this, you may only be able to edit references by hand.





Zotero in Word, step 1

Test: inserting references in text via Zotero {Citation}

 zotero

Artes digital scholarship community

Zotero | Your personal research assistant
<https://www.zotero.org/>.

Zotero quick start guide
https://www.zotero.org/support/quick_start_guide.

Learn how to use Zotero in 30 minutes
https://www.youtube.com/watch?v=BQL_7C-YqBk.

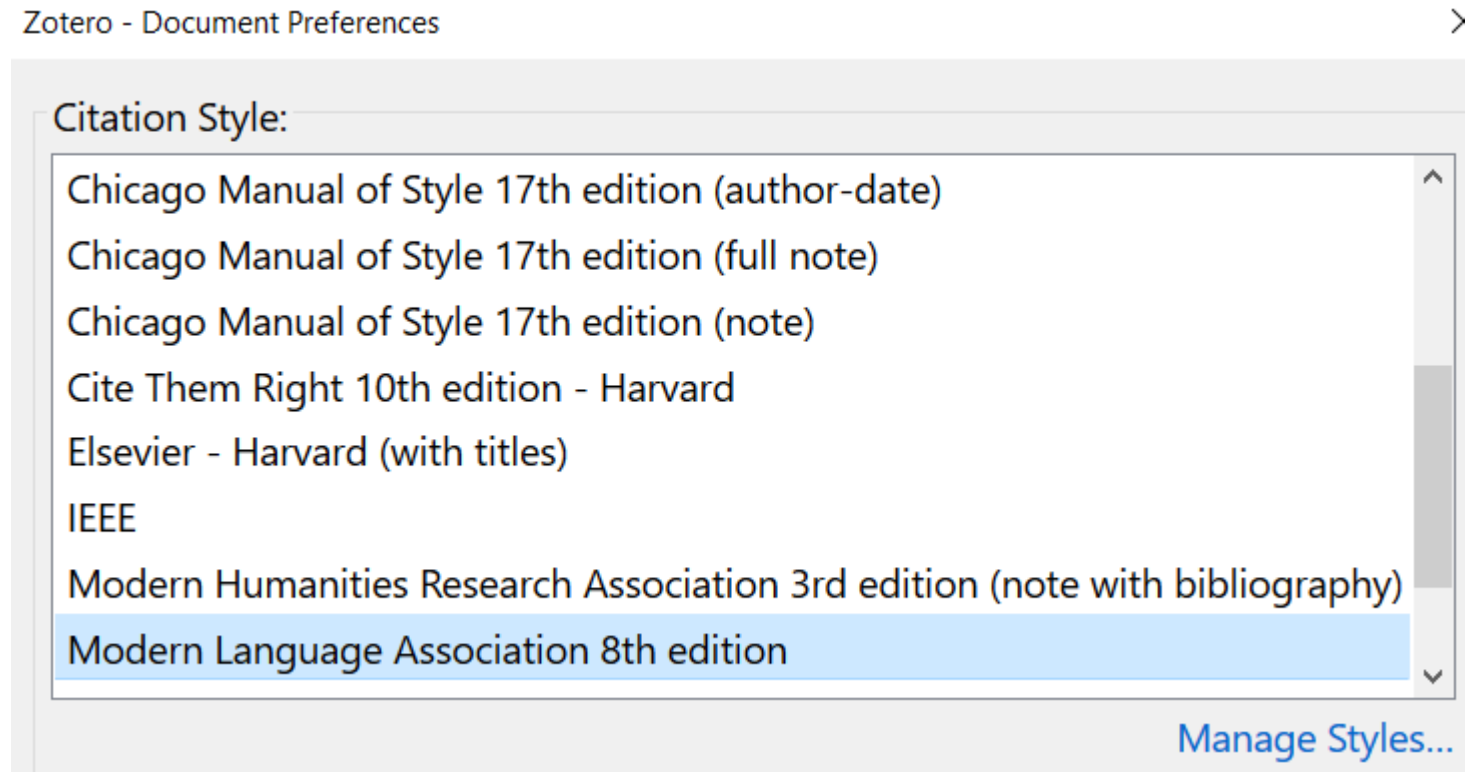
kb:collections containing an item [Zotero Documentation]
https://www.zotero.org/support/kb/collections_containing_an_item.

Zotero | Your personal research assistant
<https://www.zotero.org/>.

Zotero - Japanese Studies Digital Toolkit



Zotero in Word, step 2





Zotero in Word, step 3



Test: inserting references in text via Zotero (*Zotero Quick Start Guide*; Teperek)

Test: adding an automatically generated bibliography from the references above

Teperek, Marta. *Choosing Formats*. 6 Mar. 2015. *www.data.cam.ac.uk*,

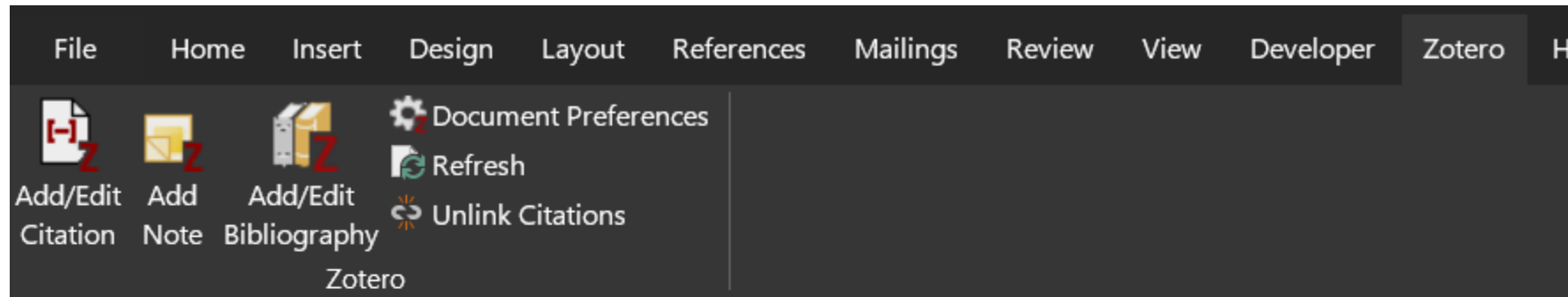
<https://www.data.cam.ac.uk/data-management-guide/creating-your-data/choosing-formats>.

Zotero Quick Start Guide. https://www.zotero.org/support/quick_start_guide. Accessed 3 June 2020.



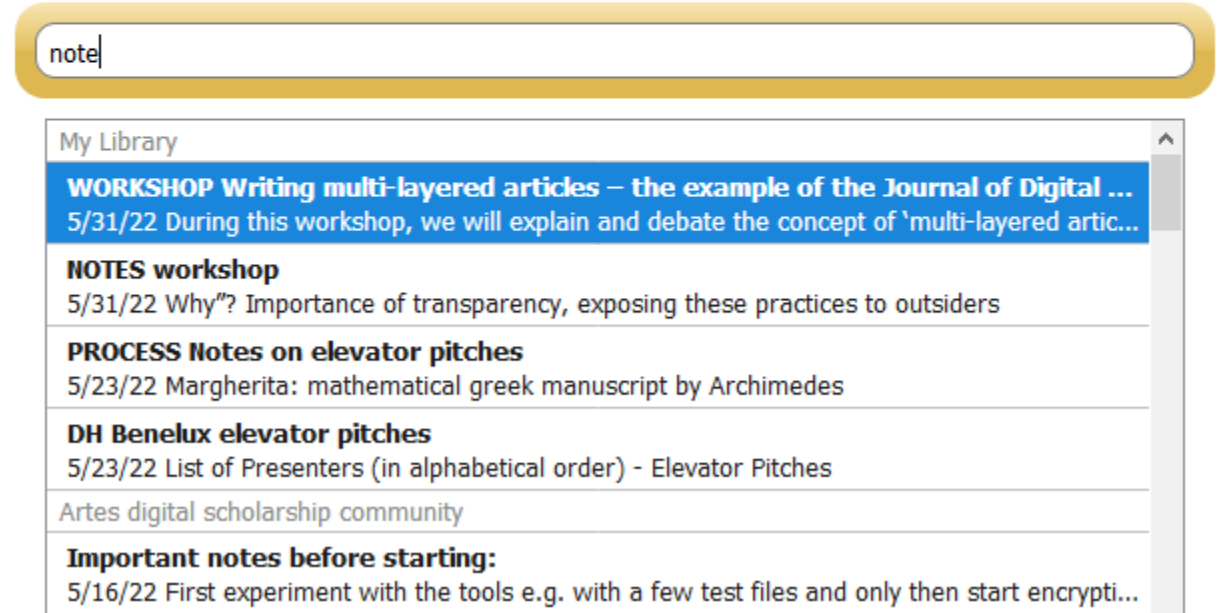
Insert note text from Zotero into Word

- Insert note text directly into publication text in Word or other text editors
- Also handy for notes that are quotations!



Lorem ipsum etc

Lorem ipsum etc etc





Other export options

- Zotero can also export references as plain-text bibliographies in a range of citation styles
- Data from Zotero can be exported in a range of formats (CSV, XML, Dublin Core, TEI, Wikipedia citation templates, ...)
- Other export/integration/display options: Timelines, visualizations, displaying Zotero libraries on a website (WordPress, Omeka, ...)
 - See the Plugins page for inspiration

Share references

Collaborate on gathering and processing sources

Neat things to do with Zotero groups

- Discover relevant sources via references added by colleagues
- Give all members full-text search of everyone's references
- Distribute and simplify work of gathering and managing references
 - Minimize time spent hunting down sources, create automatic naming rules for PDF attachments, detect duplicates, ...
- Link a project's reference library up with external tools (via plugins or via data export) to enable additional research/analysis
 - Visualization, text analysis, ... Anything that can import structured data
- Make an extra publication out of the bibliography
 - Export it and add it to a data repository (easily findable, citable via DOI)
 - Import it into a project website (WordPress, Omeka, ...)

How do groups work?

- Group libraries appear under personal libraries in the Zotero app and in the web interface
- Group libraries have the same functionalities as personal libraries (search, etc.)
- Changes to group libraries are synced to all members
 - New or deleted references
 - Changes or additions to metadata
 - Changes to files (new file, PDF was OCR'd by group member, ...)
- Groups can be open (=visible in group search on Zotero) with open membership, open but with restricted membership, or closed (=not visible in group search on Zotero) and with restricted membership

Copyright: Which files can groups share?

- Files whose copyright license allows redistribution (Creative Commons, some other licenses associated with open access publications): Can be shared in any group that allows file sharing
- Files whose copyright license does not allow redistribution (“traditional” copyright): Can only be shared in closed groups whose members are KU Leuven staff only
- Questions? auteursrecht@kuleuven.be



In-depth: Solving possible issues with Zotero groups

- **Sync conflicts:** Zotero will present conflicting items side by side to have them merged or one chosen over the other
- **Accidents that have been synced to everyone (unwanted deletions, modifications, ...):** If the problem is small, fix it by hand, then sync again. If the problem is difficult to fix by hand, check the [many options for restoring backups](#) of the Zotero library in question
- **Duplicate entries:** Can be checked and merged in the left sidebar
- **Organizational chaos:** Make clear agreements about group members' responsibilities

Optional strategies to keep things organized

- Make it easy for people to organize things the way they should:
 - Agree on **simple** rules for organizing that everyone can remember and follow
 - Make the folder structure simple and intuitive
 - Put a note in a prominent place, describing organization principles, tags, ...
 - Make an Inbox folder for uncategorized items
 - Make a Sandbox folder for experimentation
- Appoint one person as the group “librarian” and make them responsible for occasionally cleaning and organizing newly added sources (e.g. by checking for unfiled items, checking metadata of newly added items, ...). This could be a rotating position too
- Schedule a Zotero library cleanup moment every x months (together with regular project meetings/data management checkup moments?)

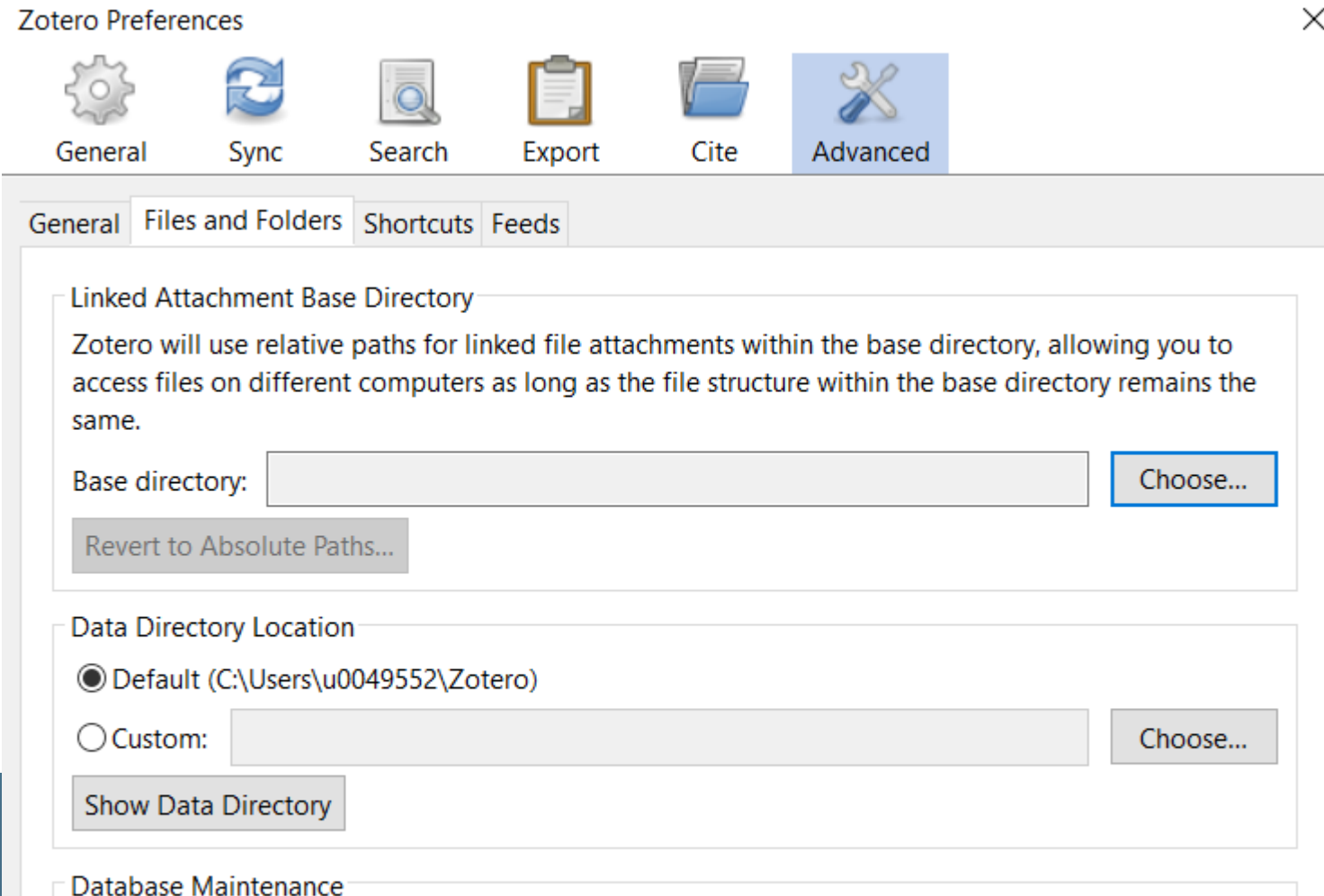


In-depth: Finding/backing up Zotero data

- Check the Zotero Preferences to find the folder where Zotero data is located
- Zotero stores two kinds of data:
 - Metadata, notes, tags, library structure, etc.: zotero.sqlite file
 - Backup files: zotero.sqlite.bak
 - File attachments: “storage” subdirectory
- Best way to create backups: Use backup utility to back up entire hard drive, including Zotero data
- Is data missing? Before you take any actions, disable auto-sync in the Sync pane of the Zotero preferences and check the many options for restoring backups

In-depth: Storing attachments in a separate directory outside the Zotero database

- Go to Preferences to change attachment storage from inside the Zotero base to a separate directory (“linked attachment base directory”), for example, to a cloud storage service like OneDrive.
- This only works for attachments to personal Zotero libraries, attachments to group libraries (the risk of individual members making problematic changes to a separate attachments folder would be too high)



Juris-M

A Zotero offshoot with extra features for law research and multilingual bibliographies

Juris-M



The Jurism Project
for the laws and languages of the world

INSTALL ▾

DOCUMENTATION ▾

PROJECTS ▾

- “Fork” of Zotero
- Specialized features for law research and working with multilingual bibliographies

Jurism Documentation

Jurism is based on Zotero, and most features work (or should work) exactly as in the “parent” project. The Zotero user base is very large, and the Zotero forums are an excellent source of information for troubleshooting. Note, however, that Jurism and Zotero are separate projects, and that Zotero team are not responsible for fielding Jurism support requests. When posting to the forums, please flag your post with **[Jurism]** in the subject line. Alternatively, post queries to the Jurism mailing lists.

The Jurism manual covers only extended functionality not found in Zotero, and is currently a mix of user-facing tutorials and developer-facing documentation. New users will want to review the section on the Abbreviation Filter.



Zotero Doc
View the gene



Zotero Foru
Browse the Zo



Jurism Man
Visit the Jurism

<https://juris-m.github.io/>



Zotero vs Juris-M for law research

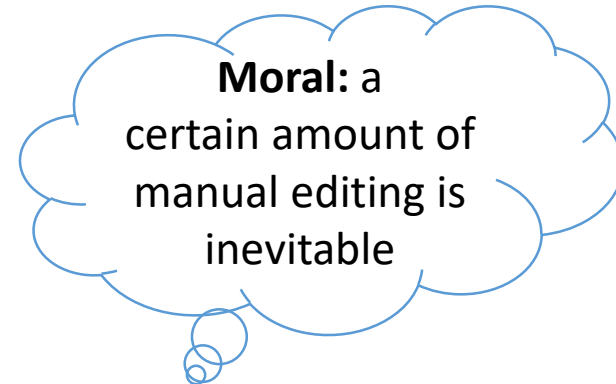
Benefits of Juris-M

- ✓ Deep-down it is just Zotero (version 5)
- ✓ Support for additional Item-types:
Bill, Case, Legal Commentary, Patent, Regulation, Standard, Statute, and Treaty.
- ✓ Comes with included lists of Jurisdictions and Courts.
- ✓ Better support for abbreviations.

Benefits of Zotero

- ✓ More features with Version 6
- ✓ Support for Legal Sources and citation-styles (V&A, OSCOLA) is there as well
- ✓ Knows about ECLI-numbers (Juris-M doesn't!)

Some worries for users of legal databases



- National databases do not work as expected with Zotero/Juris-M
 - ✓ Zotero-connector saves everything as a webpage.
 - ✓ JURA and Stradalex require substantial manual edits
 - ✓ Jurisquare has a dedicated “Citation manager” button that works, except for the pdf.
- International databases work somewhat better
 - ✓ Hein-online works well with the connector
 - ✓ Westlaw simply doesn't
- Some publishers aren't very helpful either
 - ✓ Connector does not work with Kluwer Law Online, but you can export references as RIS-files



Using Juris-M to manage multilingual items in bibliographies (1)

- Juris-M started out as “Multilingual Zotero” and still has interesting extra features for those working with multiple languages
- Example: An item with a title in Japanese characters, that title transliterated to Roman characters, and a third title that is the translation of the original Japanese
➡ Extra fields to add variant titles

Item Type	Journal Article
Title	捕鯨をめぐる対立の構造
Romaji	Hogei o meguru tairitsu no kōzō
English	Structure of Controversy: The Whaling Issue
▼ Author	森下, 丈二
Romaji	Morishita, Jōji
Abstract	シンポジウム「グローバル社会の正義と文化多様性ー捕鯨問題を事例として」(2017年9月27日開催、於一橋大学インテリジェントホール) 基調講演
Publication	結研通信
Volu	
Iss	
Pag	
D	

Add Variant

- English
- French
- German
- Kana

y m



Using Juris-M to manage multilingual items in bibliographies (2)

Especially relevant when citing items in:

- Articles in different languages
- Journals requiring variant forms in citations, e.g. the transliterated and translated form of a title

A History of Whaling

History of whaling. History of whaling. History of whaling. History of whaling. History of whaling. History of whaling. History of whaling. History of whaling. History of whaling.

References

Akamine Jun. 2017. Kujira wo ikiru [Living Whales: An Individual History of Whales and Contemporary History of Whale Eating]. Tōkyō: Yoshikawa Kō Bunkan.

Blok, Anders. 2008. "Contesting Global Norms: Politics of Identity in Japanese pro-Whaling Countermobilization." *Global Environmental Politics* 8 (2): 39–66.

Workshop slides

Useful slides when using this guide in a workshop/training

Workshop outline

1. Get everyone set up with the Zotero essentials
2. Quick overview of what Zotero can do, also for research teams
3. Closer look at Zotero features of interest to this team:
 - Discuss individual/team workflows for handling references: What are we already doing, what do we want to change or try? What workflow do we want to use?
 - Determine Zotero features of interest for team (if no obvious consensus emerges: vote to rank Zotero features from most to least interesting)
 - Cover as many interesting features as possible in the rest of the workshop

Group discussion prompts

- How do I/we currently manage sources (metadata and file copies)? What are the main issues with that workflow?
- What's my/our ideal workflow? (Think big)
- Any Zotero functionality that might help?
- How do we like our existing Zotero group? Is it clear and easy to use? Do we think it can be improved?
- What new possibilities emerge when we share references as a team?
- Can we publish the Zotero group library in some form to benefit other researchers/increase the impact of our work?
- ...

What Zotero functionality do we want to look at in-depth?

1. Closer look at the Zotero interface
2. Closer look at [plugins](#) that add functionality to Zotero
3. [Saving references from online sources with the browser plugin](#)
4. [If you have a Zotero item with metadata: how to find/add a PDF?](#)
5. [If you have a PDF: how to turn this into a Zotero item with metadata?](#)
6. [OCR of PDFs in Zotero](#)
7. [Converting a plain text bibliography for import into Zotero](#)
8. [Search options in Zotero](#)
9. [Using the Word plugin](#)
10. [Tags and folders/collections](#)
11. [Zotero notes and PDF annotations](#)
12. Other suggestion/we want to do something else with the rest of our time