**Zotero Online Script w/ Activity**

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| Script | Display / *Activity* |
| * Welcome & Introductions * If you haven’t already please mute your microphone and turn of your camera. At any point you can use the chat box for questions or unmute yourself to reply. I will also stop after every section to ask for questions. **Close Microsoft Word.** | zotero.org  *Jam board with introductions and participant’s concentrations*  https://tinyurl.com/ypmyry98 |
| * Zotero is a citation management software similar to bibme.org, Mendeley and others, but with no ads and much more powerful. * Created at Mason, open source, free with .edu email * Learning outcomes:   + By the End of this training you will have a Zotero account and have it downloaded on your personal computer and browser   + Be able to add Journals, Books, and PDFs into Zotero using any of the 4 ways outlined   + Can export citations and create a bibliography in Microsoft Word. | zotero.org |
| * **Make sure Word is closed when you download the app** because Word plug in might not download properly. * Ask what type of computer patron is using (Mac/PC) * Ask if Z is already downloaded and/or if they have an account. * Download the software, plus the browser extension. Explain what each does * Does not work on safari (for now) * We will discuss how the browser extension works later | Zotero Download page  Correct version and browser extension  Walk through install wizard |
| **Check download progress of patrons** | |
| * Creating a Zotero Account * Use your gmu.edu email address to setup your account gives you unlimited space * https://www.zotero.org/storage 300mg free for non-Mason * Creating an account allows you to Sync your Zotero library across multiple devices. * Open email and verify creation of account | Account login page  Register for a free account  Online Library (after sign-in) |
| **Check on progress of account creation** | |
| * Log in to desktop application * Set up syncing | Show sync button on desktop application   * Mac: Wheel > Preferences > Sync > Settings * Windows: Edit > Preferences > Sync > Settings |
| **Check on progress of Login and Sync** | |
| * Explanation of layout and organization of Zotero * Collections / My Library / subfolders * Explain Trash   Move item to trash  Remove item from collection   * Tags field * Blue dots are attachments Arrow is nesting * Content sorting and heading additions * Right side tabs - Tags, Notes, Related | Zotero Desktop app |
| **Pause for questions**  **Dumb smart technology** | |
| Four ways to add Content  1. Green circle with a Plus in it allows you to hand enter the information   * That being said you usually do not have to enter all this information. Usually it is just things like Author, publisher, publisher location, volume, DOI and ISSN depending on the source. * This is by no way an exhaustive list and remember that it all depends on the Citation style you end up using. * c. Once the entry is created you can select, right click, and then Add Attachment. | Zotero Desktop app  Green + icon |
| 2. Directly to the right of that there is a magic wand looking thing. If you click on that it prompts you to add a specific source identifier   * There is ISBN, which is an identifier for single publications, like novels, an ISSN which is similar but for serial publications, like journals. * DOI is also for journals but exclusively ones that were created in a digital environment. * There are other journal specific ones * Once you enter any of this it should appear in your library * Once the entry is created you can select, right click, and then Add Attachment. | Zotero Desktop app  Magic Wand icon  Ex book: 3319661922  Ex article: 9781847200808 |
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| 3. Another way to add content to the library is to simply drag the document file into the Zotero browser   * Zotero will then scan the document and create a entry based on that. * Only works for articles with obvious metadata on it. * That being said it doesn’t always work so you still might need to check the information that ends up in the info section just to be sure. * If it worked it will then save a PDF of that document with the citation in the application | Zotero Desktop App  Drag and drop items from desktop |
| 4. The final way to add something is related to the browser plug-in we installed earlier.   * Once it is added you should see a greyed out document icon in whatever browser you are using. * Once you are in a location in which Zotero can read the page, like the search result in the library database after you select an option, then the browser extension will become active and allow you to add things. * c. If it is available the full document will also be added to the library, sometimes it is, sometimes it isn’t.   Show in catalog, show in database, and explain proxy banner  (Communication with Alma: often zotero does not sense the article directly on the primo search page. You may have to navigate to the source journal in order for the plug-in to sense the article. Sometimes this is a problem and sometimes it is not) | Open Browser  library.gmu.edu  - show greyed out browser icon and how it changes  Library Catalog -  ○Add a Book  \*use examples from disciplines mentioned by patron in jamboard  In Database  ○ on results page show folder icon, saving mass citations  ○ Add a Journal Article |

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| Getting the Citation out of Zotero – 2 ways  1. From App   * Right click on the citation entry. * Then scroll down to “Create Bibliography from item” * Pick the style * You can get it in RTF, HTML, and copy to clipboard, or Print it. * RTF: Text Editor * HTML web viewable document * Copy and paste | Zotero Desktop App  *New jamboard page – have student create a citation from their own list and paste to jamboard* |
| 2. Setting up citations and a Bibliography in Word OR Google Docs   * If the plugin does not appear we can discuss the brute force way to link the plug in – (detailed below) * Show Document Preferences and citation style (and how to find more) * Type out two random example sentences (or open typed out document) and insert a random citation at the end of each one * Red citation bar * Right click on citation to show editing capabilities > suppressing author * Click on red Z in bar to get pop out classic view | Open word  Show Zotero Tab  Explain about plug in if tab does not appear  *Ask them to do this on their own Word document and copy into jamboard* |
| Setting up citations and an Annotated Bibliography in Word  (insert page break, title and center bibliography title)   * Import the bibliography underneath * Insert warning​: Do not try to edit the citation or reference in Word, edit any inconsistencies in the original Zotero record or else the source will remain incorrect and if you ever re-sync your bib in Word your changes disappear * Unlink Citations if you plan on opening the file with a different application (Pages, Google Docs, Etc.) | Show the Zotero tab in Word and follow along  Show unlink action  *Jamboard - Ask for examples* |

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| Unlinking and closing out  **Make sure to sign off of your account if using a shared or public computer,​ ​or else everyone can edit your library**  Unlinking/slash linking the account can be really difficult for people to understand. Refer them to an advanced tutorial if they have additional questions about this function. | Gear button > sync > unlink account |
| * Any Questions? * Resources for additional help   Tutorials https://library.gmu.edu/tutorials/zotero  Chris’ workshop | * Our emails * library.gmu.edu > tutorials * Workshop * www.zotero.org/support/ |

Brute force the word plug in:

● Apple: Zotero > Preferences > Cite > Word Processor > (Re)install Microsoft Word Add-in

● Windows: Tools > Add-ons

● From Word: File > Option s> Add-Ins: Zotero.dotm (https://www.zotero.org/support/word\_processor\_plugin\_manual\_installation)