

# Using Zotero to Manage Research and Citations

Ronald Wagner, PhD, ATC

California University of Pennsylvania, California, PA

**A**thletic training students, novice researchers, and seasoned scholars understand the importance of organizing references when preparing research papers, dissertations, and other scholarly documents. There are many tools and techniques for organizing research documents and citations. Zotero is a free citation management tool that is used to collect, organize, cite and share research information.<sup>1</sup> In this column, I will provide an overview of how Zotero can help you to manage research information and citations.

## Getting Started With Zotero

Zotero is available as a Firefox plugin or as a standalone application. If you are not accustomed or open to using Firefox as your web browser, the standalone application is the best option. Follow these steps to get started using Zotero:

1. Create a Zotero account. Direct your browser to [www.zotero.org](http://www.zotero.org) and click on Register. By creating an account, you will be able to sync your research information with other computers and an online library that is accessible from any computer connected to the Internet.
2. Download Zotero. Click on the Download button at [www.zotero.org](http://www.zotero.org). There are two Zotero configurations. If you have Firefox installed, select the Zotero for Firefox version. If you do not have Firefox web browser installed, select the Zotero Standalone version.
3. Configure Zotero. Open Zotero and enter your account information.
  - a. For Windows standalone click Tools menu item > Options > Sync
  - b. For Firefox plugin select Actions button > Preferences
  - c. For Mac standalone select Actions button > Preferences

## Saving Documents and Citations

Prior to saving items to your Zotero library, I suggest creating a new collection to keep your citations organized. To create a

collection, click on the Zotero button located in the bottom right hand corner of your browser. Next click on the New Collection button.

Zotero is capable of identifying bibliographic information on web pages. If Zotero recognizes the bibliographic information on a web page, an icon will appear in the address bar. If multiple items appear on a web page (eg, Google Scholar) a folder icon will appear in the address bar. To automatically save the item's bibliographic information, click the book icon or folder icon (Figure 1).

If you have an item's ISBN or Digital Object Identifier (DOI) number, you can select the Add Item by Identifier button. Zotero will attempt to locate the item and automatically add the item to your library (Figure 2).

In the event Zotero does not automatically detect the bibliographic information or you do not have the ISBN or DOI number, you can manually add an item by selecting the New Item button (Figure 2). After adding the new item to your library, you may then drag and drop the web page to your newly created library item. You can also add screen captures and PDF documents to your library using the drag and drop method.

In many cases, Zotero will automatically capture citation information. If the citation information is not captured, you can manually enter the citation information. For more information on adding documents to Zotero, review the Getting Stuff Into Your Library video.<sup>2</sup>

After your items are saved in your library, you can search for citations, identify duplicates and insert citations directly into your research paper using a word processor plugin. For more information on using the word processor plugin, review the Word Processor Plugin tutorial at [https://www.zotero.org/support/word\\_processor\\_integration](https://www.zotero.org/support/word_processor_integration).

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Figure 1. Book icon in Firefox web browser address bar



Figure 2. Add Item by Identifier button



Figure 3. Add New Item button

### Collaboration

Zotero allows you to share your citations and collaborate with others. To create a Zotero group, login to your account and select the Groups > Create a New Group. Your group can be public and open, allowing anyone to view and join; public and closed, allowing anyone to view, but members must apply; or private, allowing only invited members to view.

When an item is added to the group library, all members will be able to view the citations upon syncing. Items can also be added and viewed by logging into your online Zotero account.

### Overall Impression

Zotero is an excellent citation management tool that is intuitive and affordable. Implications for Zotero include annotated bibliographies, dissertation research, class projects, and writing abstracts. The Group feature and web based version of Zotero make it a strong competitor in the citation management space. There are free and paid versions of the software. The pay version can cost up to \$20 per month for 25 GB. With the recent release of Zotero standalone version, you no longer are required to use the Firefox web browser. There are many citation management tool options available; however, they are not as intuitive as Zotero (see Comparison of Reference Management Software for a summary of citation management tools<sup>3</sup>).

### Additional Resources

The following list of resources provide more information on Zotero.

- Zotero Quick Start Guide. [http://www.zotero.org/support/quick\\_start\\_guide](http://www.zotero.org/support/quick_start_guide)
- Zotero Screencast Tutorials. [http://www.zotero.org/support/screencast\\_tutorials](http://www.zotero.org/support/screencast_tutorials).
- Word Processor Plugins. [http://www.zotero.org/support/word\\_processor\\_plugin\\_installation](http://www.zotero.org/support/word_processor_plugin_installation)

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### Conflict Of Interest Statement:

The author does not have a financial relationship with any commercial entity that is the subject of this column.

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### About the Column Editor:

Dr. Wagner is an Associate Professor of Exercise Science and Sport Studies at California University of Pennsylvania and founder and CEO of Relearnit, Inc., an e-learning design and development company. Please address all correspondence to [drronwagner@gmail.com](mailto:drronwagner@gmail.com).