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Technology Left Behind -- Let's Go Zotero

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Technology Left Behind — Let’s Go Zotero

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The development of bibliographic management services has fundamentally changed the way many researchers keep track of their research resources and create bibliographies. Gone are the days of 3x5 note cards with facts and citation information scribbled on them. Instead, software programs and Websites designed to help users keep track of their research resources have replaced the traditional, and more tedious, processes for citing sources. Products such as EndNote, RefWorks, ProCite, and NoodleTools, only a few examples of the citation management products available on the market, have become a fixture on the desktops of researchers at academic institutions of all shapes and sizes. While they differ in their approach to the task, these programs, which range from very simple bibliography generators to more high-level research tools, enable users to save citation information and generate bibliographies electronically.

Introducing Zotero

In October 2006, the Center for History and New Media at George Mason University released the beta version of Zotero, an alternative to commercial bibliographic management products like EndNote and RefWorks. Funded by the United States Institute of Museum and Library Services, the Andrew W. Mellon Foundation, and the Alfred P. Sloan Foundation, Zotero is a free, open source research tool designed to help users collect, manage, and cite their research sources. Since its release, Zotero, whose name is “loosely based on an Albanian word meaning ‘to acquire, to master’” (http://gazette.gmu.edu/articles/9088/), has grown into a robust tool for harnessing and organizing research resources.

Zotero is a plug-in for the Firefox browser. Users must first have Firefox installed on their computer to be able to download, install, and use Zotero. The program cannot be used with Internet Explorer or other browsers. Once Zotero is installed, the Zotero icon appears in the lower right hand corner of the Firefox window. Opening the Zotero plug-in is as easy as clicking on the icon. While it is necessary to have Firefox open to be able access the Zotero window and the citation library, it is not necessary to be online to use the application.

One of the key factors that sets Zotero apart from other bibliographic management tools is this integration into the Firefox browser. (Similar bibliographic management tools are, by design, independent from the browser. EndNote must be installed on a user’s computer, saving the citation information on the computer’s hard drive, while RefWorks is a Web-based solution. Users navigate to the RefWorks Website to access their saved bibliographic citations.) When open, Zotero appears in the lower half of the Firefox window, enabling users to pull item(s) from a Website or from a list of search results directly into their citation library without ever leaving their browser. Zotero is able to remain open while users browse the Web, and items can be added to the citation library with the click of a mouse.

The Zotero Interface

The Zotero window has an easy-to-use iTunes-like interface, divided into three columns. The left column contains the “My Library” folder, which holds the complete library of items that have been saved. The full library can be sub-divided into individual collections. Each collection is represented by a folder, and the folders can be arranged hierarchically. The middle column displays all of the items in whichever collection (folder) is highlighted in the left column. An item could be a book, article, Webpage, or other information source, and a single item can be included in multiple collections and folders. The right column is divided into five tabs: Info, Notes, Attachments, Tags, and Related. Each tab contains information about the item that is highlighted in the middle column.

The Info tab contains all of the citation information about an item, as well as the URL for the item, if it is available. On the Notes tab users have the ability to make notes about the selected item. These notes are searchable, and multiple notes can be added to a single item.

The Attachments tab enables users to attach files to an item. For example, if a user has downloaded an article from a Website, Zotero can be used to archive Web content by capturing screenshots of Webpages. Users can highlight text and add annotated notes to the screenshot of the Webpage. This functionality means that Zotero can serve not only as a citation library, but also as a document library. By attaching images of articles and Webpages to the citation information in the Zotero library, users can use Zotero to keep track of and archive their actual research resources, not just the accompanying citation information.

The Tags tab enables users to categorize their items by inserting tags or subject headings. Tags can be browsed, searched, and edited globally. In some cases, when importing records from library catalogs or databases, Zotero will automatically pull the subject headings in with the citation information and pre-populate the Tags tab. The Related tab is used to relate one item in the Zotero library to another. For example, if a user has imported records for items on the same topic or by the same author, the items can be related to each other.

Importing and Exporting

Zotero is unique in its ability to pull citation information from Websites and import it directly into the Zotero citation library. Translators are created for various Websites that allow Zotero to “sense” or extract citation information and metadata elements on Websites. (A list of Zotero-compatible Websites can be found at: http://www.zotero.org/index.php/translators/). When Zotero detects items such as books or articles on a Webpage, an icon will appear on the far right side of the Firefox location bar, where the Web address or URL is displayed. To save the citation information about the item displayed on the Webpage in Zotero, it is as simple as clicking on the icon in the location bar. If more than one item is displayed on a Webpage, such as in search results from a library catalog or on a Website like Amazon, a list of items will be continued on page 84

Endnotes

2.  The SAN — http://www.niso.org/standards/detail.cfm?std_id=528
4.  BISAC — http://www.bisg.org/bisac

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review and approval by the Business Information Topic Committee. Along with this core working group, a larger monitoring group will be formed that will allow interested individuals and organizations to be kept abreast of the working group’s activities and to have the opportunity to provide input and feedback to the working group. If you or your organization is interested in participating in the monitoring group, please contact the NISO office.

The initial interest in this project has been significant and speaks to the complexity of the problems our community face managing the relationships among and between institutions that purchase content. While many important issues remain to be addressed, we have confidence that the developing working group will satisfactorily resolve them. In the end, we hope there will be some added clarity surrounding much of the key identification data needed to provide information to institutions.
Getting Started

The easiest way to get started with Zotero is to view the Zotero screenscapes available on the Zotero Website. (http://www.zotero.org/documentation/screencast_tutorials). The screenscapes walk through the tool’s functionalities, demonstrating such features as finding and searching for items, managing a collection of items, tagging items, and archiving and annotating Webpages. In addition to the screenscapes, the Zotero Website includes extensive documentation on the development of Zotero. The Forums area of the Zotero site is particularly active, allowing Zotero users to connect with each other and exchange ideas, tips, and customization solutions.

Despite the limitations mentioned above, Zotero is a powerful research tool, and well worth looking investigating as an alternative to commercial bibliographic management tools. It provides seamless integration with the Firefox Web browser, and offers users robust tools for organizing and accessing their research resources.

Sources


I recently came across an interesting press release put out by the Stanford University Libraries and Academic Information Resources (SULAIR). The university had created a virtual library within Second Life. For those not in the know, Second Life is a virtual reality platform in which more than eight million people meet, socialize, debate, and interact. A number of higher education institutions have established a presence within Second Life, with activities ranging from virtual lectures to reference services on demand to social commons. I recently interviewed two of the founding forces behind Stanford’s foray into this brave new cyberworld — Rachel Gollub, Manager of Development and Research within the Digital Library Systems and Services Group, and Deni Wicklund, SULAIR Technical Support Manager.

Why did Stanford decide to launch a Second Life presence?

We explored Second Life from a number of perspectives, including research and experimentation, platforms for teaching and learning, and community resources and library access. We also visited a number of educational and library sites in Second Life to get the feel for what others were doing. We were impressed by the diverse uses and the success of locations like Info Island and the Harvard Law School lectures, and felt we could add value to our library offerings and raise our profile by opening a site in Second Life. It also gives us an opportunity to showcase some of our more obscure collections and resources; we are currently displaying some of our digitized collections.

I Hear the Train A Comin’ — Stanford in Second Life

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I exported below.

Book citation in MLA Style:

Article citation in MLA Style:

Book citation in APA Style:

Article citation in APA Style:

Interestingly, some of the errors Kessler noted have been corrected, while others have not. For example, when Kessler conducted her review, the book title in the MLA style was in italics when it should have been underlined. As can be seen in the example above, that error has been corrected. However, Kessler also noted that the editor of the book was not listed in the citation when it should have been. That error is still present in the citation I exported.

Like Kessler, I retrieved the article citation from JSTOR. When Kessler exported the article citation from her library, the citations included a URL and a retrieved date. When I exported the article citation from my Zotero library, no online access information is included. It is impossible to tell that I accessed this article electronically at all. While it appears that some work is being done on the citation formatting, neither the APA or MLA styles are being reproduced accurately at this time.

I

displayed. Users need only check the items they want to save.

If a translator is not available for a particular Website or for whatever reason Zotero’s automatic sensing function cannot be used, it is possible to add items to the Zotero library manually. Users pick one of 34 different source types (i.e., book, journal article, presentation, film, etc.) and then fill in the rest of metadata for the item. In addition, citation libraries that have been saved in other bibliographic management products can be imported into Zotero.

Data can be exported from Zotero in a number of ways. When first downloaded Zotero comes with the ability to generate bibliographies in ten different citation formats, including Chicago, MLA, and APA, and additional citation formats can be downloaded from the Zotero style repository (http://www.zotero.org/documentation/citation_formats).

Similar to EndNote and RefWorks, Zotero will integrate with word processing software. Plug-ins are available for Microsoft Word and Open Office. The plug-in enables users to access their Zotero libraries through their word processing software. Once the plug-in is installed users can insert and edit both citations and bibliographies using a set of icons that appear in the word processing software’s toolbar. Users of word processing programs other than Microsoft Word and Open Office can export citations to a clipboard and paste their bibliographies into their documents. (http://www.zotero.org/documentation/word_processor_integration)

Limitations

One of Zotero’s significant limitations is portability. Because the tool is integrated with Firefox, users cannot access their Zotero files without the browser. There is a way around this, though. The Frequently Asked Questions in the Documentation section of the Zotero Website recommends installing a portable version of the Firefox browser on an external storage device, such as a USB drive or a portable hard drive. The FAQ also provides instructions on how to back up the data in the Zotero library to an external device. An external device could also be used to sync-up Zotero libraries on different computers. It is worth mentioning that the ability to access a Zotero library from anywhere on the Web is a planned feature for future development, as is the ability to back-up and sync-up the citation library remotely.

While Zotero is a powerful tool for storing and organizing items, there are some issues to be resolved in the formatting of citations for bibliographies. In an October 2007 review of Zotero in The Charleston Advisor, Jane Kessler details errors made in the formatting of citations for a book and an article in both the MLA and APA styles. For the purposes of this review, I put the same two items that Kessler used into my own Zotero library, and exported them in MLA and APA to see if the errors in citation formatting that Kessler pointed out were still present. See the citations

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<http://www.against-the-grain.com>