

## Teaching Zotero

1. Brief description of Zotero (it's free! it'll make your research life easier!)
2. **“Wow” moment** -- create a bibliography on the fly from Zotero references (do a search to get references)

3. **Installing Zotero:** have everyone install Zotero. (Note: since the computers in Smith Libraries' classrooms already have Zotero installed in Firefox, this step can be skipped. In sessions for students, though, it's important to have students do this, so they can begin using Zotero, and learn how easy it is to install it--either within Firefox, or as a standalone version for Chrome or Safari. **\*It's ideal for students to bring their own laptops, if possible.\***)

3A. *Consider having students create Zotero accounts, since they can practice syncing their references after saving them. If not, though, students will be prompted to create one when syncing their library (see #9 below).*

4. **Saving citations:** have everyone go to a database or the 5C catalog and do their favorite search. (Note: this first directive can be altered depending on the audience--e.g., social work students can go to Social Work Abstracts, undergraduates can go to Discover or another discipline-specific database.) Point out the Zotero icon in the browser bar. Explain that Zotero scans web pages as they load, and indicates citations by adding a save button appropriate to whatever items it detects. Have everyone save a citation. Point out the pop-up notification as you save a database citation. Quickly show everyone a website (e.g., nytimes.com), and how the icon changes depending on what you're looking at.

5. **Editing citations/entering them “by hand”:** have everyone edit the citation they just saved, by looking in the far right pane of Zotero and selecting fields of their citation to edit. Point out the “New Item” feature, which allows you to add citations manually--handy for when Zotero can't detect what you're looking at.

6. **Attaching PDFs:** if students are in a database, have them limit their search to full text. Demonstrate how Zotero automatically downloads the PDF of the citation within their Zotero library. For PDFs that require students to click through SFX to get to them--or for PDFs students have already saved on their computers--have students save the PDF to the desktop, then drag and drop it into Zotero. To rename PDFs within Zotero, select them by right-clicking on them, then choose “Rename File from Parent Metadata.”

7. **Organizing collections in a library:** point out how citations appear in the top-level folder “My Library.” To organize citations, show them the “new collection” icon in the far left pane, and how to drag citations from their top-level library to a sub-folder. Point out that citations now appear in both places. **\*Caveat:** whatever is deleted from “My Library” is deleted in all other collections, so use extreme caution (or certainty) when deleting items from ‘My Library.’ Citations within specific collections can be deleted, and will still remain in ‘My Library.’

8. **Creating bibliographies:** show how to create bibliographies using the copy & paste method. (Right-click on the reference, choose the citation style, choose ‘Copy to clipboard,’ and paste it

into a word-processing program.) Have everyone create a bibliography from the two citations they've saved. (Note: Zotero has plug-ins for MS Word, Word for Mac, and Open Office. When working with a student one-on-one, mentioning the plug-in at this point is often better than doing so in a class of students, given the myriad versions of word processing programs, browsers, and versions of Zotero.)

9. **Portability:** there are two main options for moving your library: (1) syncing your library with your Zotero account; and (2) exporting your library to a USB drive.

To sync your library, set up a free Zotero.org user account. Then:

- Open Zotero preferences (via the gear menu) and select the Sync tab.
- Enter your Zotero user name and password.
- Check the "sync automatically" box.
- Check both boxes under File Syncing and choose Zotero storage for My Library. This will sync your PDF attachments as well as citations.
- Click the green circular arrow button at the top right corner of the Zotero window.
- Zotero will upload your library to the server.

The other way to export a library -- especially handy if students are switching computers -- is to save their library to a USB drive. On the student's "home" computer, click the Zotero gear menu, choose Export Library, and save the file to a USB drive as an .rdf file. On the library's computer, click the gear menu, choose Import, and find the Zotero file to import it. When finished, make sure to export any changes to the USB drive or the cloud, and import the new file onto the "home" computer.

**Using Google Hangout** (instructions courtesy of Brendan O'Connell)

- **Test audio** on your computer, and test it when students join. If they experience feedback, ask them to mute their computer's microphone, or wear headphones.
- **Share your desktop with students** when they join the Hangout session, as opposed to sharing your screen. Sharing the desktop allows students to see Zotero in action--e.g., toggling between a database and Zotero, or a web page and Zotero Standalone.
- **Enlarge the screen after sharing your desktop.** Some web text is awfully tiny, so zooming in using the CNTRL + command will help students see what you're doing.
- **Have students ask questions via the chat feature in Hangout.** This may be ideal for engaging a large group of students, when it's not feasible to verbally chat with every student.