

Introduction to Zotero for Citation Management Webinar - Q&A Document
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Thank you for your interest in the webinar "Introduction to Zotero for Citation Management."
This webinar was offered as part of the Taubman Health Sciences Library Global Health Webinar Series at University of Michigan.

Please note that I, the instructor of this webinar, have no financial relationship with Zotero or any other software I discuss. All opinions are my own, based on 12 years' experience independently evaluating, using, teaching and troubleshooting various citation software tools to many different user groups as part of my job as an academic librarian. You may have different experiences with these software and disagree with me, and that's fine! I encourage you to explore this tool and any other that interests you or the users you work with.

Below you will find a list of questions asked by participants in the live webinar, with answers written by the webinar instructor.

Questions about saving sources with Zotero:

- Does it save PMID as well?
 - Yes. When you save an article from PubMed with the Zotero web browser connector, the PMID is automatically saved. (If you're saving from another database, it depends on if that database makes the PMID or PMCID available for Zotero to save from their meta-data.) You'll find it in the "Extras" field of your Zotero record for that article.
- Can it save website e.g. WHO website?
 - Yes, you can save World Health Organization websites. [See my example on saving webpages here](#). When you save a webpage with the Zotero connector, check the Zotero entry created to make sure all the important details were saved. (There's a lot of variation between different websites and where important details like the title, authors, and date appear on the page, if that information even exists at all.) Check out my Zotero tutorial's page on [fixing errors in the Zotero record](#) for more information.
- What if you add a pdf and the citation already exists - does it dedupe? or re-add the metadata?
 - If you drag and drop a PDF into the center panel of Zotero ([this process here](#)), it will create a new record for that item, even if you have already saved the citation

information. However, if you select the existing record in the center panel and then drag and drop that PDF directly on top of it, it will attach that PDF to that selected record without duplicating it.

- If a PDF article has automatically been downloaded with a series of number as the file name, can you change the file name so the PDF can be automatically attached to a citation in a Zotero library?
 - No. I would recommend attaching each file one at a time (as described in the answer above), or dragging and dropping all your files into Zotero ([as described here](#)) and then removing duplicates.

Questions about citing sources:

- Is there a way to generate a bibliography and customize links besides DOI, e.g., back to PubMed?
 - As I mentioned live, this is not typically recommended practice for any citation style I know. However, if you want to do it, you have a couple of different options:
 - You can edit your Zotero records directly - you can replace the DOI in the DOI field with your preferred link in each record, and your citations will update. [See my page on editing a bibliography record here](#) (instructions for Google Docs are the same as Microsoft Word).
 - Once you are done creating Zotero citations in either Microsoft Word or Google Docs, you can choose the option 'Unlink Citations,' which will turn your citations into regular text. For each citation, you can remove the DOI and replace it with a PubMed link.
- In case you want to insert the citation in the middle of the a sentence not at the beginning nor end of the sentence. How do you do that
 - Place your mouse cursor and click at the point where you want to add the in-text or numbered citation, then use the Zotero Word or Google plugins to "Add/Edit Citation." Zotero allows you to create citations wherever you want in your document.

Questions about collaboration:

- Do your collaborators have to install Zotero to see all references shared in your Zotero member group?
 - No. You have a couple of choices:
 - Create a public group. With a public group, your collaborators won't even need to create a Zotero account in order to see the references. However, the downside is that other people will be able to search for and view those references you've shared, and you also will not be able to share PDFs due to potential copyright restrictions.

- Create a private group, and ask your collaborators to create Zotero accounts online. They will then be able to log into their online accounts and view the references you're sharing with them (including any PDFs). They do not need the Zotero program just to view references. However, if they wish to have full functionality of Zotero, they will need to download the software.
- Can the notes/annotations be shared with your group?
 - Yes. Make sure that the PDF you're annotating is shared with your group, then go ahead and make your edits; all your collaborators will be able to see those annotations, and will be able to make their own annotations too.

Questions about how Zotero compares to other citation management programs:

- If your library provides access to EndNote, which do you recommend, between EndNote and Zotero, to your users who have never used any citation management programs?
 - This depends on a few factors! Generally, I recommend Zotero to new users who haven't used any citation management tools before. In addition to what I've said about [Why Zotero generally](#), here's a few reasons why I specifically recommend it over EndNote:
 - Most users I've talked to find Zotero more intuitive and easier to use than EndNote.
 - EndNote licenses are expensive, and not every library or institution pays for access. If your user eventually moves on to a different institution, they may find themselves without access to EndNote any longer, in which case they'd have to transfer their content and learn a new tool, or pay for a private license themselves. I always like to recommend good quality free tools whenever I can for this reason, especially if I'm teaching graduate students, post-docs, medical residents/fellows, visiting scholars, or other groups with a potentially short-term relationship to my institution.
 - Relatedly, your user may end up in multi-institutional collaborations with other researchers who don't have access to EndNote. Using a free tool means that collaborators can sign up for free too!
 - I've found it's way more reliable for collaboration than EndNote. I have had too many experiences trying to help users who tied their EndNote libraries to their online account to share with collaborators and ended up with corrupted libraries and loss of data. This can be a problem even if your user has multiple devices that they work on. Zotero syncing, on the other hand, has never given me any problems.
 - Here's a few reasons why I might recommend EndNote to a user instead:
 - If you know the faculty/researchers at your institution are heavily invested in using EndNote, then you may want to encourage others to use EndNote as well, as mentors may expect mentees and new collaborators to use the same programs that they do.

- If they need to save *many* PDFs, the EndNote license may be nice. The free version of Zotero is limited on how many PDFs you store in your online account, shareable with collaborators or syncable across multiple devices. (There is no limit to how many references you can save with a free Zotero account, just the attached PDFs.)
 - EndNote does have some nice customizable features, such as being able to easily edit your own citation styles (without any programming knowledge), edit your export formats, and customize/semi-automate your deduplication process. If those things are of interest to your users, then EndNote may be right for them. As a librarian, I love these features and use them frequently! However, I've found that that's often not necessary for the average user's needs.
 - Some institutions' IT departments block websites, and it can be challenging to get them unblocked. If Zotero is blocked at your institution, you may have no choice but to direct them to EndNote instead.
- Zotero is cool, but I'm struggling to see why it is preferable to Mendeley. They seem so similar! Is there a reason for my users to switch?
 - If your users are happy with Mendeley, you may decide that any benefits to Zotero are not worth all the time and effort that your users would need to make the switch. That's fine! Zotero is my favorite citation management program that I use the most myself and recommend to the most number of users, but I also personally use EndNote for some tasks and help users who prefer EndNote themselves. That said, here are some reasons I prefer Zotero over Mendeley. Please note that I stopped using and teaching Mendeley a couple years ago so my information may not be 100% up to date. When possible I linked to Mendeley's documentation online to confirm.
 - Depending on your users' needs, Zotero may be better for collaboration, in a few ways:
 - Mendeley users with free accounts are limited to 5 private groups, and those groups can have a maximum of 25 members. ([See source here.](#)) Zotero's group creation and membership is unlimited.
 - Mendeley discontinued public groups in 2021 ([source](#)). Public groups are still possible to create in Zotero.
 - I do not believe that Mendeley currently has a plugin for Google Docs, while Zotero does. This is a useful tool for collaborative writing/citing.
 - At this time, I do not believe that Mendeley integrates with Retraction Watch in order to inform you of retracted items in your library.
 - Mendeley was bought over a decade ago by the for-profit academic publishing company Elsevier, and is proprietary software. Zotero has existed for as long as Mendeley has, but has remained open-source and produced by a non-profit organization. Relatedly, check out the

differences between [Mendeley's statement about what they do with your data](#), as compared to [Zotero's](#).

- While Mendeley has some tips on [their support center](#), for the most part, when there are Mendeley problems, your users have to directly reach out to Mendeley for support. Personally, I significantly prefer [Zotero's open forum](#) process of getting help, because I can search the forums for known issues as I'm troubleshooting when users reach out to me for help, and I can usually solve them myself (even with my limited IT knowledge - I'm a librarian, not an IT professional!). However, perhaps you're not resourced to do as much troubleshooting at your institution as I do, so in that case Mendeley's approach might be a benefit for you.
- As I mentioned in my talk, my job involves evaluating different citation management tools for different workflows. That means I like to use as many programs as I can! And a few years ago, having the Mendeley Word plugin installed alongside other citation management plugins kept crashing the app and sometimes my whole computer. Once I removed Mendeley, everything started working again smoothly. There was nothing Mendeley did that Zotero didn't that would make me keep using it, so it just became more trouble than it was worth for me.

Miscellaneous Questions:

- Can we expect a notification of retractions?
 - Yes! Zotero partners with Retraction Watch to let you know when an article saved to your Zotero library has been retracted. [See more information here](#).
- I would like to show this recording to a group of my librarians. Would you allow me to do this? It would be for internal purposes only.
 - Yes! I am so happy to hear that you think this recording would be valuable for your colleagues. Anyone can share this recording, the slides, this Q&A document, and the online tutorial with your colleagues and friends. However, please do not re-post anything you receive from this webinar publicly on the internet. (For example, please don't upload the video recording to YouTube or any other video platform.) The recording will be posted on our website here: <https://guides.lib.umich.edu/globalhealth/webinars> for anyone to view; please link to that instead of re-posting.

Thank you, attendees, for the great questions!