Contributing to Zotero Shared Libraries: A Guide for Engineering Studies

Consortium for History of Science, Technology & Medicine

Version: 6 December 2023

Authors(s): Ryan Hearty, Juyoung Lee

Note: This guide is intended for use on a traditional desktop or laptop. The guide may not be suitable for tablet or phone users.

Group homepage: https://www.zotero.org/groups/5036327/engineering_studies

Group Library page: https://www.zotero.org/groups/5036327/engineering_studies/library

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Step 1: Creating a free Zotero account

Go to https://www.zotero.org/user/register and fill in all fields. Activate your account via email. Success! You can optionally download the Zotero app to your computer and set up syncing. But let's move on, as those steps are not necessary for accessing and contributing to our shared library.

Success

Email Validation

Success! You registered your Zotero account!

Set up Zotero syncing

You can now set up Zotero syncing to sync your data across multiple computers, access your library online, or collaborate in group libraries. Follow these three steps to get started.

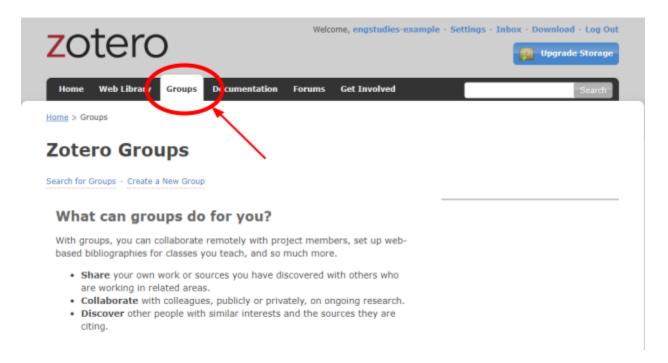
1. Open Zotero

Open the Zotero application from your dock, launcher, or filesystem.

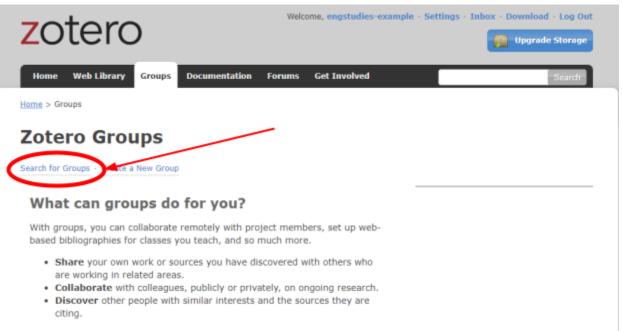


Step 2: Joining the Engineering Studies Group

1. Once logged in, click the "Groups" tab in the navigation bar



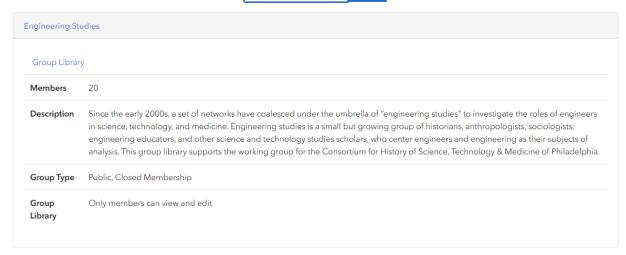
2. Click "Search for Groups"



3. Search for "Engineering Studies."

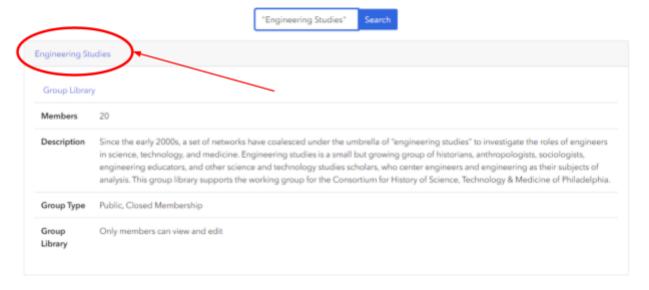
Search Groups

"Engineering Studies" Search

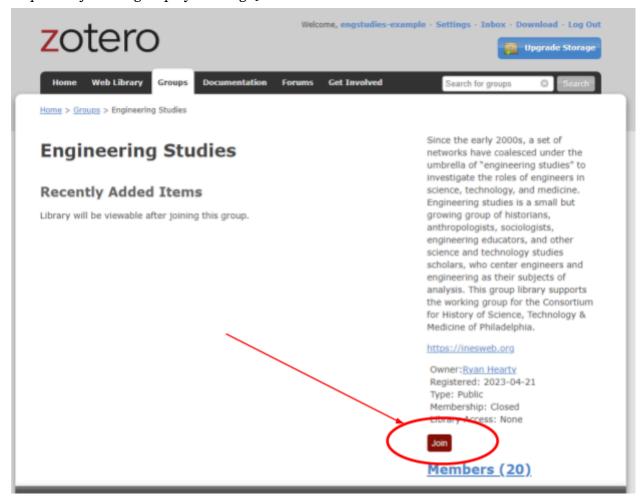


4. Click the title, "Engineering Studies." (If you clicked "Group Library," you will see that you don't have access yet.)

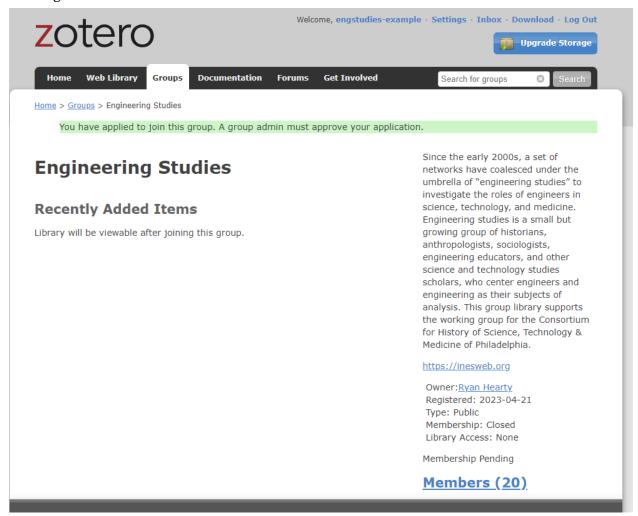
Search Groups



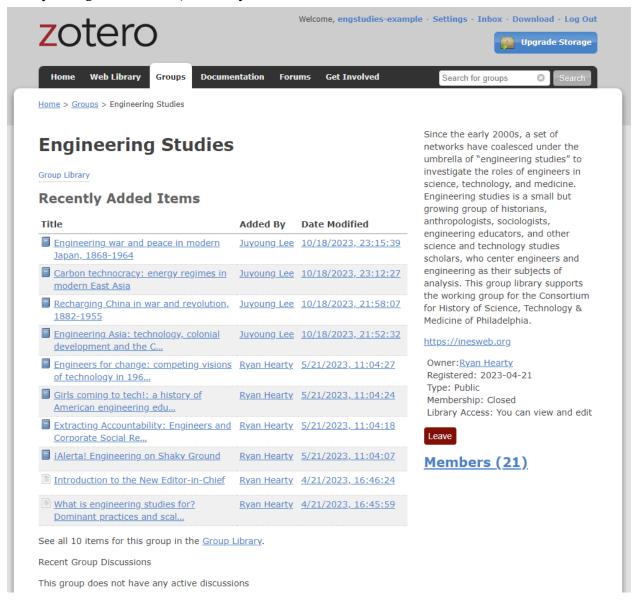
5. Request to join the group by clicking "Join."



6. Wait until you are granted access. You should see this screen, with "Membership Pending."



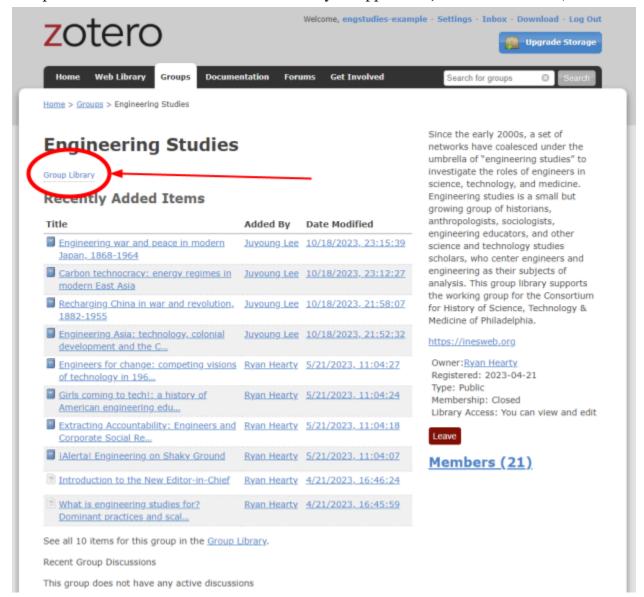
7. Once you're granted access, refresh your browser. You should see this screen:



Success! You're not a member of the group and can access the group library.

Step 3: Accessing the group library and its content

1. From the <u>group webpage</u>, click "Group Library" to view the library from your browser. (If you have downloaded and synced Zotero to your computer, you will also see a new Group Libraries folder toward the bottom left of your application, in the default view.)



- 2. This will bring you to the main Group Library window, seen below. It has four main sections:
 - a. The source list, in the middle. This view changes if you select the entire group library, select a single collection, select a tag or set of tags, or perform a source search. (The search bar is usually in the upper right corner of your screen, if using a traditional desktop or laptop device.)
 - b. The Item Pane, to the right. This lists the source details, as well as notes.
 - c. The Collection Pane, to the left.
 - d. The Tag Selector, in the bottom left corner.



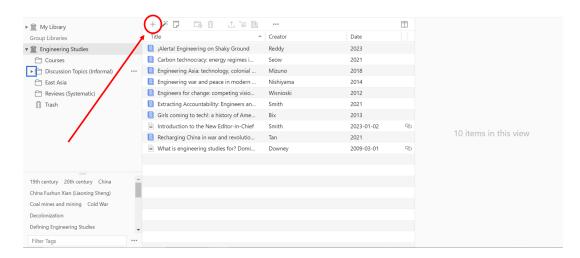
Step 4: Contributing content to the group library

Example a: Adding a source

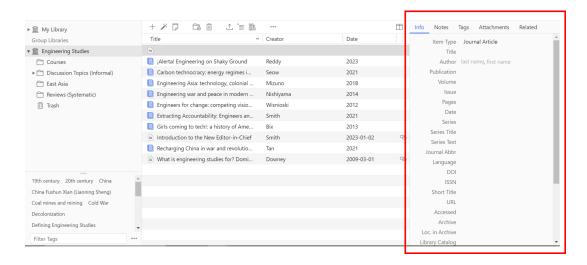
Once you enter the "Group Library," there are two ways to add a source.

1. Manually inserting information

Step 1. You can input the source information manually by clicking the "plus" sign, or "the new item". It will give you the option of choosing what types of source you want to add. Initially you will have the option of Book, Book Section, Case, Hearing, Journal Article, and More. Once you clear "More" you will have more options to choose from.

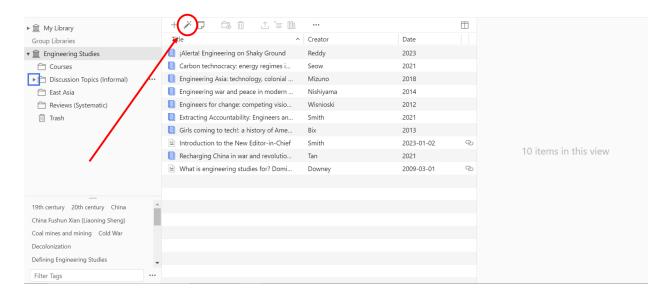


Step 2. A box where you can input necessary information will pop up on the right, depending on which type of source you have chosen. You can directly write information in each responding line.

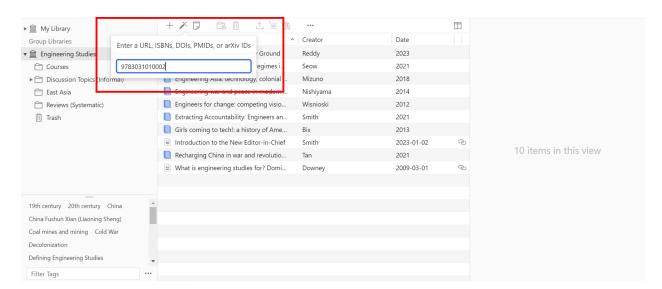


2. Automatically inserting information

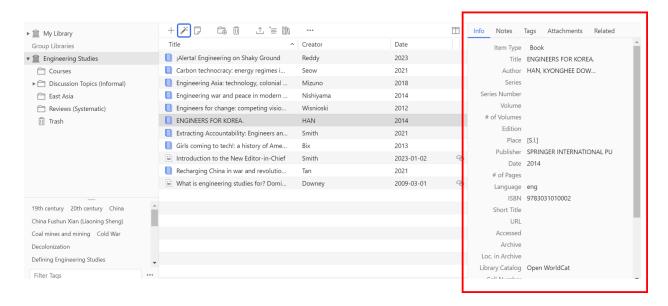
Step 1. You can input the source information manually by clicking the "magic wand" sign, or "Add by Identifier". You will be asked to "Enter a URL, ISBNs, DOIs, PMIDs, or arXiv IDs.



Step 2. When you enter the information and press enter, Zotero will automatically add the source.

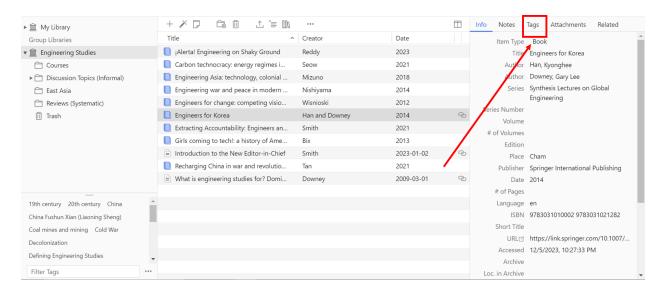


Step 3. When Zotero added the information on source, please check if the information entered is correct. If there are any mistakes, you can directly make edits to the box on the right.

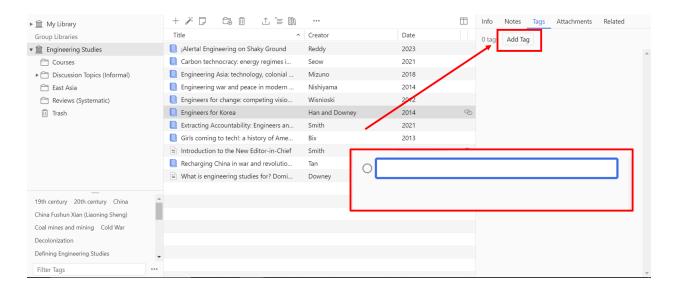


GROUP DECISION: How will we set rules for adding and naming tags?

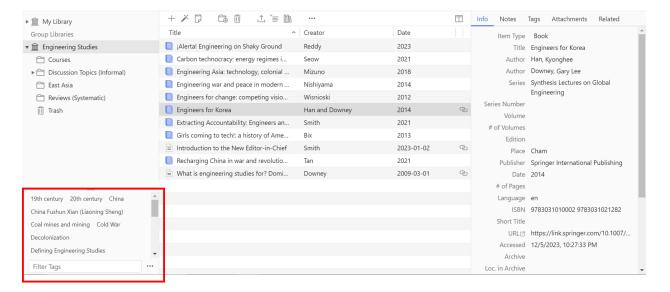
Step 1. Click on the title of the source that you want to add a tag and then click "Tags."



Step 2. Click on the "Add Tag," which will create a blue box that you can enter a tag for the source. The tags can include the source's thematic, periodic, regional, or any other keywords related to the source.

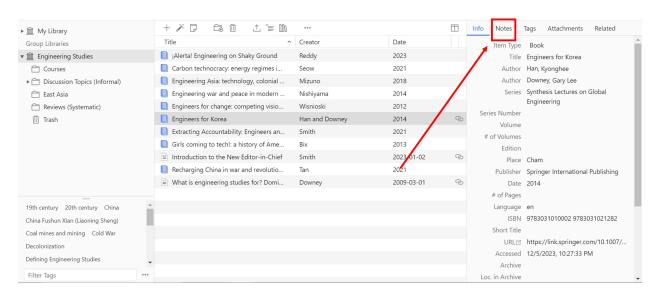


Step 3. You can easily filter sources of your interest by searching with the tags.

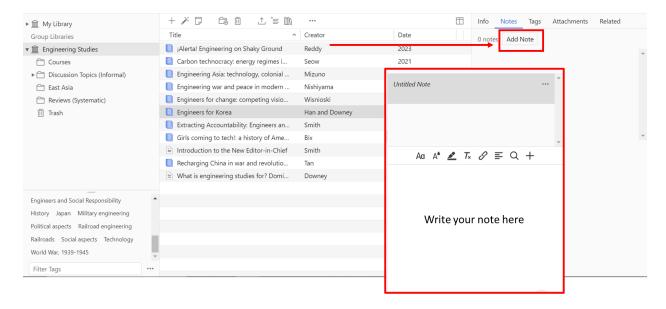


Example c: Attaching a note to a source

Step 1. Click on the title of the source that you want to add a note and then click "Notes."



Step 2. Click on the "Add Note," which will create a box where you can write a note about the source. You are very welcome to share your short thoughts on the sources and/or how other group members can utilize this source.



Example d: Organizing sources into collections and subcollections

A collection is a folder within the main Group Library, Engineering Studies. Each collection can have subcollections, or subfolders. Our group will need to decide what kind of hierarchical structure we want to maintain.

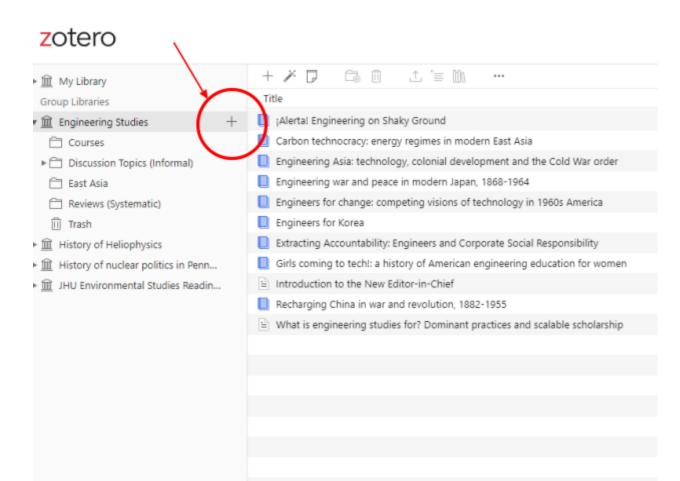
GROUP DECISION: What collection structure do we want?

Organizing sources into collections

Step 1. Create a new collection by clicking the + icon that appears when you hover your mouse pointer (if using Zotero on a traditional laptop or desktop) over the Group Library name, "Engineering Studies," in the Collections Pane near the left of your screen.

Step 2. Type the name of your new collection and hit Enter. You can later decide to rename or delete the collection.

Step 3. Once the collection exists, drag and drop any source from your Group Library over to it.



Organizing sources into subcollections

In addition to renaming and deleting collections, you also see the option to create a subcollection when you click the three dots that appear next to the collection in the Collections Pane. You can also move collections if you decide to change the collection structure later.

zotero

