

Digital Research Tools

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Zotero

Zotero is an open-source reference management application that is commonly used across the disciplines. It has some limitations (particularly for non-Western languages¹), but it is a good place to begin. It was developed by historians for general humanities use and has become popular in almost every academic field. Zotero can be the foundation for keeping track of not just references, but also your reading notes, archival transcriptions, and connections between documents.

At this stage, you are probably thinking about collecting and reading sources. But keep in mind that Zotero can also be a useful tool for helping you to 1) interpret a set of sources and 2) simplify the process of citation/bibliography generation during the writing process.

Finally, if you don't like Zotero and you decide to use a different tool for reference and note management (like Devon Think, EndNote, RefWorks), it is still a good place to start. You can easily export all of your references, notes, and tags to use in another application. Other proprietary software will not make this process so easy.

If you just need to create a quick bibliography, you can do this with Zotero Bib: <https://zbib.org/>.

Favorite Zotero features according to #twitterstorians²:

- Generating bibliographies
- "The real value in using Zotero is building a searchable, sortable, annotated, and organized database of literature. That's what will _really_ pay off 10 years down the line."
- "Love tagging and cross-tagging. I have general thematic or author (I'm in lit studies) tags, and also each chapter of the diss, or "MLA 2019" for upcoming conference paper. Makes it easy to find my archive when going back to revise, things that didn't get cited in 1st version etc"

¹ For non-Western languages, you can still use the Zotero infrastructure (e.g. creating an account on zotero.org to sync your citations), but Juris-M is the better option for software for actually adding citations: <https://libguides.colorado.edu/MLRMS>

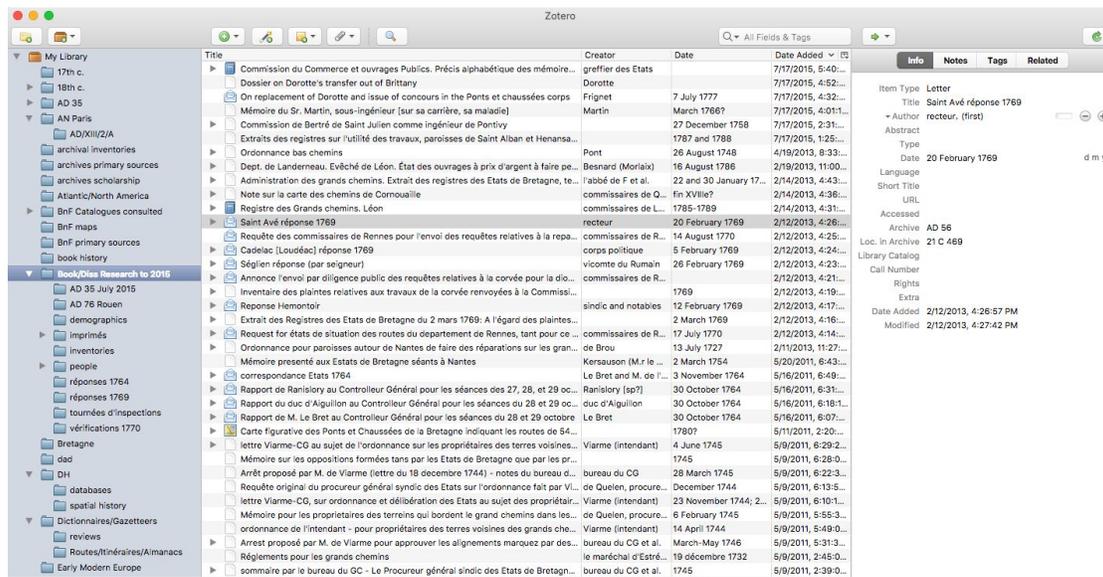
² See <https://twitter.com/khetiwe24/status/1038099434112921601> for the thread by Katie McDonough, who developed the original version of this handout

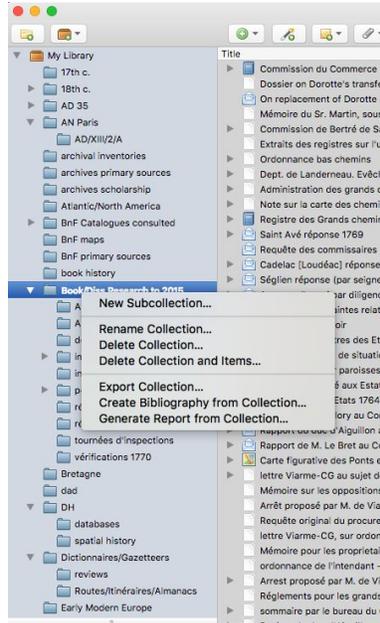
- “I like to tag things as “unread” when they come into my library. Otherwise, I’m apt to lose track of what I’ve read vs. what I’ve merely downloaded/printed/ILled. Helps me organize my process!”

Zotero best practices

General

- Opt for the desktop Zotero app so that you are not dependent on internet access
- Install the Zotero Connector (for Chrome, Firefox, or Safari) to automatically identify content on the web that can be imported into Zotero (<https://www.zotero.org/download/>)
- If you write in Word or LibreOffice, Zotero has plugins that will allow you to automatically create bibliographies (https://www.zotero.org/support/word_processor_integration). It is also possible to export citations to Google Docs – see <https://zotero-manual.github.io/citations/>. 99% of the time you still need to edit these generated footnotes or bibliographies because of errors in the imported metadata.
- Consider what you establish as collections vs. subcollections vs. entirely new libraries. One approach is to create separate collections for primary sources and secondary sources.
- When you have an item to enter that doesn’t conform to the available item types, use the “document” type.
- Use the “Notes” option to include separate notes for 1) reading notes and 2) transcriptions of documents/important quotes.





Primary Sources

- If you are working with non-digital primary sources, you can still use Zotero to keep track of your materials by manually entering source metadata (e.g. the pieces of information you would normally write in the works cited or your footnote) to the item fields. This is a great way to keep track of your sources, where they are located in the archive, attach notes or even pictures, and tag related sources.

Secondary Sources

- These sources tend to have library or database records that you can automatically save to Zotero through the Connector.
- Not all sites and databases provide metadata in the right format for Zotero to recognize. When you add something to your Zotero library, check in Zotero to make sure that all the information you'll eventually need for a citation is coming through, and if not, add it manually.
- Books: It is worth thinking about whether or not you want to document the particular manifestation of a book (e.g. the one at Green Library) or not. For example, you may want to keep track of how different editions of a work discuss a particular topic. Having separate Zotero items for each edition would be useful. On the other hand, this may not be relevant for many works you use. In this case, it is a best practice to use the WorldCat (<http://www.worldcat.org/>) as the source for your Zotero Item (rather than, say the Stanford Library Record). WorldCat metadata translates especially well to Zotero. You will get a feel for this as you see how the fields auto-complete when you import items. It will save you time later in your thesis if you create clean bibliographical data during the import stage.

- Articles: You have less to worry about here, but be sure to not just save the PDF of an article but the full reference details. Google Scholar is not bad at this, but most of the databases you will use (JSTOR, ProjectMUSE, etc.) will export decent metadata.

Advanced

- Use the Voyant Zotero Export to visualize your collections (<https://github.com/corajr/zotero-voyant-export>).
- If you use the “Tags” option to connect related sources, develop a vocabulary early and stick to it.
- Use the “Generate Reports” function (control+click) to create a doc that contains your source details and notes in an easily readable format.
- For quick citations check out the new pared-down ZoteroBib (<https://www.zotero.org/blog/introducing-zoterobib/>)

Zotero help

<https://www.zotero.org/support/>

<https://zotero-manual.github.io/>

Tropy

[Tropy](#) is a free open-source research photo management software.

- Documentation is available at <https://docs.tropy.org/>
- A [webinar](#) is also available on YouTube.
- Pro: Tropy allows you to add research notes to images and to call out specific areas of the image.
 - For example, this could be useful if you are working with images of archival documents and need to add transcriptions. However, notes are not easily transportable to other document formats.
- Con: Tropy projects are not easily transported between computers.
- Con: Not all image metadata imports automatically.
- Con: Due to a bug, if you use a second monitor, always move your Tropy window back to the primary screen before closing.

Lightroom

[Adobe Lightroom](#) is a professional-standard image editor that has substantial file management and metadata features. Students can purchase a year subscription for the entire Adobe Creative Cloud (including Photoshop, Illustrator, InDesign, etc) for a [reduced price](#) (\$85/year).

- Pro: Imports image metadata including keywords.

- Pro: Metadata edits are written to the file itself.
- Pro: Libraries can be exported and are transportable.
- Pro: Geotagging is supported.
- Pro: Has extensive photo editing capabilities.
 - Edits are non-destructive (they don't alter the original image)
 - Multiple "virtual copies" can be made that don't take up space on your computer.
- Pro: Integrates with Adobe Web Publishing services (Portfolio, Spark)
- Con: Lightroom is not designed for appending research notes.
- Lightroom and Adobe Creative Cloud tutorials are available through [LinkedIn Learning](#) (formerly Lynda.com, free for Stanford students).