Unit 4, Module 13, Video 1: Using the Zotero Plug-in with Microsoft Word™

Unlike most of the rest of Galvan’s book, I am not going to ask you to read a chapter, or at least not read it carefully. That’s because the vast majority of what Galvan has to say in Chapter 13 refers to procedures that are largely irrelevant if you rely on Word and Zotero’s powerful features to do all of that for you. However, just to give you a sense of what you’re missing, go ahead and scan chapter 13. Also, so you can try out the things I’m demonstrating, make sure you’ve installed the Zotero plug-in for Microsoft Word.

In these two videos, I’m going to demonstrate some of the features of the Word plug-in for Zotero and I’m going to show you how to set things up. This is a powerful tool. It takes a bit of getting used to, and at first, it may seem to slow things down. That will change as you gain facility and rely more on habit. But the real pay-off of this way of doing things comes down the road, as you are getting close to being able to submit your work. In those final days and hours of your writing process, instead of trying to manually confirm that your in-line citations are accurately formatted, and that your reference list is complete, you can instead focus on the more substantial aspects of the writing process.

For that to happen, however, you will need to be disciplined about how you insert citations in your text. I think this will make more sense if I do a bit of a demonstration of the old—and error-prone—way of doing this. Then I’ll describe the relevant features of Zotero, Word, and the plug-in that makes them play nicely. These include some ways to set things up to make the whole process simpler by making the Zotero plug-in’s features a bit easier to see.

This is a manuscript that does not contain the special codes that are inserted when you use the Zotero plug-in, though note that it is heavily annotated as it’s intended to be a teaching tool. Other than that, though, it’s what you would get if you just typed it up (or, parenthetically, if you did use Zotero but then, as a final step, removed the special codes). What’s the problem with this? Well, there are several. First, you’ll have to make sure that the in-line citation – that’s this thing here – is consistent with APA format. That’s pretty straightforward when you’re citing a journal article with one author: last name, comma, and publication year. All that in parenthesis. Two authors, no big deal: last names, in the same order as on the original publication, an ampersand – the “and” sign – in between them, then a comma, then the publication year. Sheesh, what’s the big deal?

There isn’t one. But it’s seldom that simple. And a quick perusal of the guidance at the Purdue OWL or in the APA Style Guide will show you how complicated it gets. Take, for example, the various situations where you have more than two authors. As per the sober explanation at the OWL, you list 3 to 5 authors’ last names, but just the first time in your document.
Subsequent citations, you use that funny Latin phrase, et al., which is an abbreviation of “et alli,” or “and others.” That’s why there’s a period after “al,” but not “et.” It gets better. When there are 6 or more authors, you always use the et al. thing. Even the first time. Are we having fun yet? And this doesn’t even get at the issue of your list of references. As you cite sources, you will need to add them to your reference list. But if you edit out or replace a source, then you need to keep your references current with what’s in your document. Then there are all the rules about how they are supposed to be formatted.

Of course it’s possible to do this manually and people have been doing so for decades. I just think there are better uses of your brain. Enter Zotero and the Word plug in.

Zotero and your library of source documents

Before I focus on the specifics of Zotero and Word, I am going to show you a setting in Word that will prove to be really helpful: showing fields. Now in Word-ese, fields are dynamic text elements. For example, there are several ways to use fields that apply page numbers to a manuscript. I want you to learn how to make the fields visible, because they are an important aspect of how Word and Zotero interact.

Making fields visible

To do this on a Mac pull down the Word menu (at the far left, next to the Apple). Select Preferences, then View. Set Field Shading: to Always. Click OK.

On Windows, select Options, then the tab, View, then set Field Shading: to Always. Click OK.

The benefit of setting things up like this is that you will have a better sense of what Zotero is up to, Word-wise. This is particularly important when you are using some of its advanced features to generate some of the more exotic in-line citations. Also, it will help you stay disciplined and consistent in using the plug-in properly. And by the way, make sure you’ve done that—installed the plug-in.

Inserting in-line citations

At this point of the process, you’ve already been using Zotero to help you manage information about the sources you’ve been reading, analyzing, annotating, and synthesizing. Zotero is like many other tools in that it relies on what’s known as metadata. This is simply data about data. When you add a source to Zotero—and I’m doing that here by clicking the little icon in the address bar and bringing in this really interesting paper I read about yesterday—then several things happen. First, as signaled in the little pop-up window, Zotero automatically pulled in a pdf-format version of the actual paper, and attached it to the Zotero-library item. But second, look over here on the right at what it put in the various fields in the “Info” section. Each author’s name goes on its own line. And the first author’s name has a little
accent mark over the last character (I think that means it would be pronounced “kah-ray”).

Alright, let’s assume that you want to cite this in your paper. I’m going to go to a document that’s just got some text—don’t anguish about the fact that it’s not really referring to this source. I’m going to now go to the Zotero plug-in’s menu, which is under the funny-looking Apple Script menu, here. Select Zotero, then Add Citation. Then I switch to what they call “Classic View,” because I’m old. Note also that the first time you do this, you’ll need to set the style: APA, of course.

Now I find my document, which is easy because they’re sorted by the date I added them to the library. Then click OK.

And it’s in. Notice that it shows all 5 authors. And also notice that it’s clearly a field—dynamic text—because of how I had it set up to show field shading, always.

Let’s assume, however, that I’m making a slightly different point from the same paper, in the same paragraph. One way to do that would be to copy it, then paste it. But that’s a bad idea. Why? Because it won’t take advantage of Zotero’s more powerful feature. So I get rid of it. Retrace my steps from before—script, Zotero, Classic View, select, OK.

See? Zotero left the first one the way it was, and the way that APA style says it should stay. But for the second one—and subsequent ones—it would abbreviate it with the “et al.” thing.

**Things to (still) think about**

Zotero can only do so much, and while it’s smart to lean on it, you will also want to make sure that you are still paying attention to things like where your sentence’s terminal punctuation marks end up, basically, after the closing paren that brackets your in-line citation.

So play around with this to get the hang of it. In the next video, I’m going to demonstrate how you can insert citations in other formats to properly document things like quotations, and to provide pleasing variety to your text.