

## Zotero Smoothie: Blending Citations into Annotated Bibliographies and Literature Review

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Authors	Piotto, Livia
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## Zotero Smoothie:

### *Blending Citations into Annotated Bibliographies and Literature Review*

*Livia Piotto, Reference and Instruction Coordinator, John Cabot University, lpiotto@johncabot.edu*

#### **NUTRITION INFORMATION**

Doing research not only means finding appropriate sources that answer a research question but also engaging with the works written by other scholars, understanding how these works converse with each other, and how our own research interacts with other scholars' work.

The open-source citation manager Zotero is a powerful tool that can help researchers to collect, organize, and use their sources. In many cases, and especially at the undergraduate level, the software is usually used only as a tool to create simple reference lists that the students need to include in their papers to make sure the sources used are appropriately credited. Zotero is seldom used to its full potential, often because there is not enough time to teach all its features, and students do not see how investing time in learning how to use a citation manager can eventually help them saving time, especially when they need to engage in long-term and more advanced projects, such as a final thesis.

Specifically, one of the ways in which Zotero can help students manage their time more productively is the possibility to store notes and descriptive tags related to the collected sources that can be used to create annotated bibliographies and to generate a network of

relationships between sources, which can then be used in preparation of a literature review.

This recipe provides a workshop outline that is divided into two main sections. Part 1 shows students how to create an annotated bibliography using Zotero. Part 2 shows students how Zotero can help them build the backbone of a literature review by putting the sources collected in relation to each other.

#### **LEARNING OUTCOMES/PROJECT OUTCOMES**

Student attendees will benefit from the following outcomes:

- Understand the difference between annotated bibliography and literature review.
- Think critically about sources related to a topic to evaluate their content and to identify varying perspectives within the disciplinary conversation.
- Identify relationships between sources in preparation for the literature review.
- Be able to identify contributions to the scholarly discourse surrounding their research topic.

#### **NUMBER SERVED**

This recipe serves undergraduate students in classes/groups of 10–20.

#### **COOKING TIME**

Prep time. Preparation time may vary depending on how the students have been introduced to Zotero. Unless the students have attended a preliminary session about the basics of the software, the instructor might need to inform the students (via email or LMS) that they have to be ready with the software already installed on their computers.

Activity time. Cooking time is 75 minutes, but the session can also be shortened to 60 minutes if necessary, or it can be offered as two 30-minutes-long sessions.

#### **DIETARY GUIDELINES**

The frame Scholarship as Conversation stresses that the learner must “identify the contribution that particular articles, books, and other scholarly pieces make to disciplinary knowledge”; it also emphasizes the importance of critical evaluation of sources underlying that one of the learner’s dispositions is to “suspend judgment on the value of a particular piece of scholarship until the larger context for the scholarly conversation is better understood.” The above-mentioned knowledge practice and disposition can be addressed in contexts that require the learner to understand how to make sources in con-

nection with each other using annotated bibliographies and literature reviews.

Both annotated bibliographies and literature reviews are ideal tools when it comes to evaluating sources and contextualizing them to understand how they can contribute to a wider scholarly discourse. This recipe is designed to help students place sources in conversation with each other, with the support of Zotero citation manager. Using some of the features of the citation manager, students can work with sources gathered during a research project, adding notes in preparation of an annotated bibliography, and correlate the sources in a visual way that can facilitate the preparation of a literature review.

Typically, this recipe can be served in the context of an English composition course where undergraduate students are conducting research for the first time, but they have to learn the necessary skills to create different types of writing assignments that engage the use of sources in a variety of ways, including annotated bibliographies and literature reviews. In a similar context, students are taught to read and carefully annotate their sources before deciding whether these can be included in an academic research paper or not. The process of annotating sources is closely related to source evaluation since it encourages the students to look at books and articles retrieved during their research closely and critically in order to evaluate their scholarly merit. In this broader context, the recipe is not only applicable within the Scholarship

as Conversation frame, but it can also be tied to Authority Is Constructed and Contextual, and Information Creation as a Process.

### INGREDIENTS & EQUIPMENT

- Instructor computer with projector
- Internet access for all students
- All students will need to use their personal laptops where they need to have Zotero already downloaded and ready to be used.
- Presentation with overview of annotated bibliography and literature review
- Whiteboard and markers

### PREPARATION

- This session requires a minimum level of familiarity with Zotero, and especially it requires the students to have the software already installed on their personal laptops. For practicing only, the personal devices can be substituted by computers in the instruction room, but not having the students using their laptops undermines the idea of having them leaving the session with a concrete take-away—namely, the tool readily available for their own research purposes.
- Ideally, students need to have attended a previous preparatory instruction session (in class or during a dedicated workshop) to introduce them to Zotero citation manager, its main features, and its potential for research. If this recipe refers to a session embedded in a course, the students will then have the possibility to work with the sources that they have

started collecting for their final research project. If, instead, the session is offered as a standalone workshop, the instructor will have a list of three to five sources ready with which the students can work.

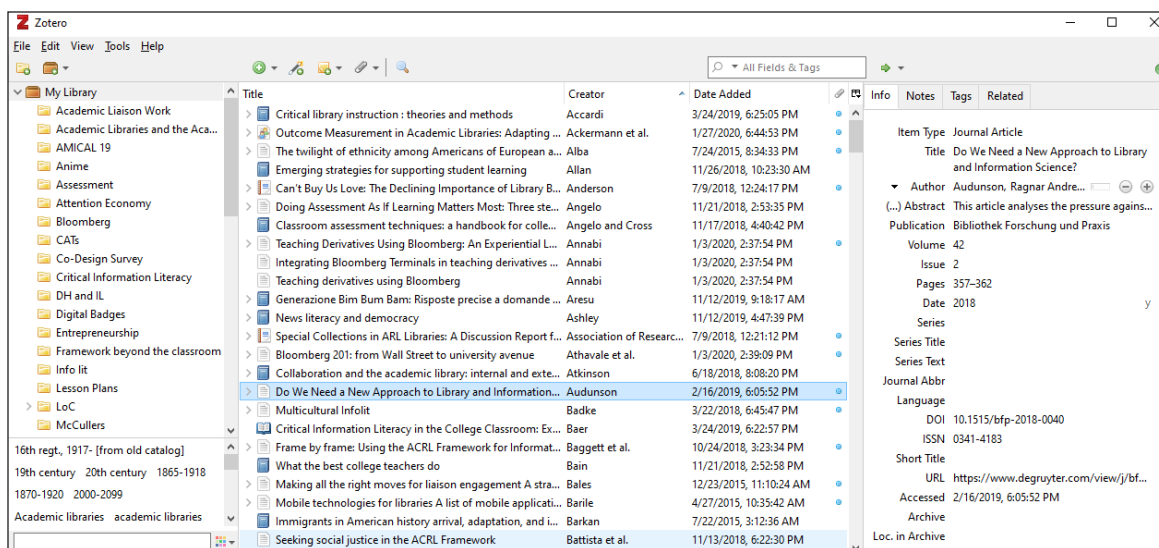
- Before the session, the instructor prepares a presentation that briefly outlines characteristics and differences of annotated bibliographies and literature reviews.

### COOKING METHOD

**Introduction.** Start with a brief review of what Zotero is and what a researcher can do with a citation manager. This can be done by showing an example of a Zotero library (figure 1) and highlighting the main sections and their functionalities. (10 minutes)

**Part 1: Annotated bibliographies.** During the first segment of the session, introduce the concept of annotated bibliography, why it can be useful working on an annotated bibliography during the research process, and how Zotero can be used to create one. (25 minutes)

1. Project on the screen a 2- or 3-slide presentation highlighting the main features of an annotated bibliography, with a focus on evaluative annotated bibliographies that require a critical approach to the sources rather than a descriptive one.
2. Explain how the process of source evaluation can be incorporated in Zotero by using tags that can become labels that the researchers add to their sources while they are engaging with them.



**Figure 1. Sample Zotero library**

3. Ask students to annotate one source present in their Zotero library using features like tags and notes to describe the source.
4. While the students create their network of tags and write notes describing or analyzing their source, explain how they can assign multiple notes to each item in a Zotero library that can be used to outline the different sections of the annotations for the bibliography.
5. Describe how Zotero does not automatically include the notes created while exporting a bibliography, and how, therefore, the students need to manually copy and paste the annotations created as Zotero notes in the bibliography list exported from the software.
6. If the session/workshop is tied to the instruction of either APA or Chicago style

(currently only for these two styles), help the students to add additional styles to Zotero (figure 2) in order to include American Psychological Association 7th edition (annotated bibliography) and Chicago Manual of Style 17th edition (note, annotated bibliography). Explain that, by doing this, the students will be able to use the Extra field in the sources' descriptive record to include the final annotation, which will then automatically be included when exporting the bibliography (figure 3).

**Transition.** During this transitioning segment, engage the students in a short discussion about the differences between an annotated bibliography and a literature review, how the two are related to each other during the exploration of the sources

in a given discipline, and how using them both can facilitate the analysis and review of the scholarship upon which the research is based, especially for long-term projects (e.g., final theses). In the discussion, try to solicit common characteristics and differences between an annotated bibliography, as it was introduced in the previous segment, and a literature review from the students. While the students provide their ideas and concepts, jot them down on the whiteboard for later review, and leave the students free to elaborate a definition of a literature review. (10 minutes)

- Part 2: Literature reviews.** The third segment of the session is dedicated to the literature review as a way to approach published literature on a given topic by putting the sources in conversation with each other and with the students' own research. (25 minutes)
1. Start this segment by summarizing the definition of a literature review put together by the students in the transitioning segment. Compare the commonly agreed definition with an official definition of literature review that is projected in an introductory 2- or 3-slide presentation.
  2. Ask the students to go back to the Zotero tags and notes they have previously worked on to highlight themes and connections between recurring themes in the sources collected in the library.
  3. Illustrate the importance of Zotero as a tool that can easily and quickly help a researcher to label the literature available in the researched topic.

Zotero Preferences

General Sync Search Export Cite Advanced

Styles Word Processors

Style Manager

Title Updated

Get additional styles...

Citation Options

Include URLs of paper articles in references

When this option is disabled, Zotero includes URLs when citing journal, magazine, and newspaper articles only if the article does not have a page range specified.

Tools

Style Editor Style Preview

OK Cancel Help

Zotero

File Edit View Tools Help

All Fields & Tags

Title	Creator	Date Added
News literacy and democracy	Ashley	11/12/2019, 4:47:39 PM
Literacy, Technology and the Economics of Attention	Bigum et al.	11/12/2019, 4:40:56 PM
Alternative Facts, Fake News, Conflicting Perceptions, & ...	Crowley	11/12/2019, 4:44:44 PM
Library 2.0, information and digital literacies in the light o...	Koltay	11/12/2019, 4:41:00 PM
The Two Markets	Lanham	11/12/2019, 4:40:32 PM
Guicini Cribb, University Librarian, Singapore Managem...	Lo et al.	11/12/2019, 4:44:17 PM
Theme 5: Tech can't win the battle. The public must fund...	Lo et al.	11/12/2019, 4:41:07 PM
New digital threats to media pluralism in the information...	Parcu	11/12/2019, 4:46:16 PM
Librarians and the Attention Economy		11/12/2019, 4:40:22 PM
Attention, Please   Inside Higher Ed		11/12/2019, 4:40:10 PM

Info Notes Tags Related

Call Number

Extra This article addresses contemporary and emerging issues involving perceptions of "truth," particularly truth in social networking and other web environments. It is a work primarily tackling issues concerning perceptions of truth in the United States of America with a lesser emphasis on their impact on other developed nations. Heuristics (trial and error lessons) derived from the author's tacit knowledge gained in the political arena communicating factual information to legislators and their staff under the American constitutional right to petition for "redress of grievances" are provided. Research dealing with the well-documented predisposition of people, both well and poorly-educated, to seek out information supporting their existing views is considered. Also reviewed are the implications of the increased availability of disinformation and misinformation from hostile, mercenary, illegal, alt-right, alt-left and other contentious online sources. The

**Figure 2. Zotero preferences window where new citation styles can be added**

- Demonstrate how to use Zotero collections (folders) to create source groupings and to organize the sources by themes and subtopics, and ask students to practice with their folders in their Zotero library.
- Emphasize how an essential goal of a literature review is to draw connections between sources and how the Zotero "Related" feature can become a practical tool to visually draw these connections between the collected sources in order to link them in a broader scholarly discourse. Sources linked with the "Related" features become visually connected and can,

**Figure 3. Extra field used for the annotation**

therefore, be easily grouped for highlighting scholarship influences and relationships (figure 4).

**Wrap up.** As a closing reflection, emphasize how Zotero can be used as a true citation manager and not merely a citation generator, given that it allows the researcher to do more than simple reference lists. The many features Zotero offers are designed to set the ground in preparation for more elaborate research work, such as a literature review. (5 minutes)

**ALLERGY WARNINGS**

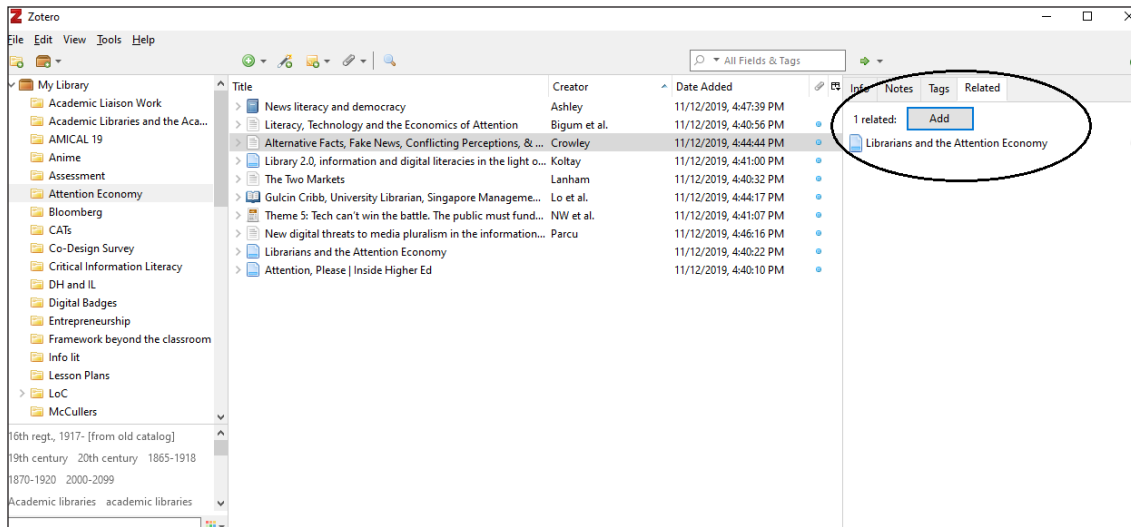
The ideal setting for this session will have the students working on their laptops where they have previously installed Zotero. Alternatively, they can work in a classroom equipped with computers where the software must be

already installed, but one of the main take-aways of the session is precisely that students can start working independently on their own devices even during the session itself, and they can save their work without having to redo it after the session is over.

On the other side, using laptops, and not wired computers, requires a good and stable Wi-Fi connection, and the entire session could be jeopardized and slowed down by poor connectivity. Consequently, poor internet connection problems might cause disengagement from the students' side.

It is also highly recommended to ask the students to have the software already installed on their computers in order to save time during the session. Having participants that





**Figure 4.** One source related to the selected source in the Zotero library

still need to download the software might impact the timing of the session and its activities and, once again, might disengage participants that instead have Zotero already downloaded. For this reason, if the session is offered as a standalone workshop, participants should be required to download the Zotero software prior to the beginning and in preparation for the session itself. The instructor should consider informing the participants about the session requirements in the workshop description or via email.

Moreover, the session functions better if the participants have already had an introductory session/workshop on the basic features of Zotero. Alternatively, the introductory seg-

ment can be a little longer to bring all participants up to speed.

### CHEF'S NOTES

The session has been developed to be offered within the context of an English composition course, but it works better as a standalone workshop especially aimed at students that are already familiar with Zotero or who are interested in learning about how to use the tool in preparation for their final thesis or capstone project. When the session is offered as part of a broader course, students might feel “forced” to learn a software they are not interested in using, and they might be less engaged or even disinterested.

It is important, if not essential, to make sure that the students have Zotero already downloaded on their computer prior to the beginning of the session/workshop. This can be done via a message sent to the students with a set of instructions, but it is preferable to offer a dedicated session on Zotero basics (what it is, how it is used, how it works for retrieving citations and quickly creating bibliographies) during which the students can download it and troubleshoot possible technical problems with the instructor’s support. If the session is taught within a course, the librarian needs to coordinate with the course instructor to dedicate two class periods to Zotero instruction. If, instead, the session is offered as a standalone workshop, it could be part of a series of workshops dedicated to Zotero, and students would be asked to attend the Zotero basics workshop before attending the session on annotated bibliographies and literature reviews.

One aspect to keep in mind is that the session is not aimed to create a literature review. While Zotero has the capability to automatically generate annotated bibliographies (in APA and Chicago style) or to create the space for saving the annotations, the citation manager serves as a tool that helps the researcher storing the preparatory work needed to write a literature review.

### ADDITIONAL RESOURCES

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