

ECHO Network Research Team: Shared Zotero Library Protocol

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March 12, 2021

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How to Join the Group Library: ECHO Network Zotero Library

- Go to www.zotero.com
 - Register for Zotero on the site (top right-hand corner of screen), and you should be able to sign in
 - You can add references directly to the group library at Zotero.com - great if you are on a computer without Zotero installed - or you can open Zotero on your own computer, add the reference in the program, and then sync to update the group library online.
 - There are three easy ways to add references to Zotero.
1. You can click on the ‘Add items by identifier’ button (a magic wand with a green plus sign) at the top of the central panel in Zotero, then enter the desired reference’s DOI.
 2. You can use the ‘Save to Zotero’ button in Chrome or another browser (not Internet Explorer) after installing the relevant add-in. This can be used to import directly from an article’s page on a journal website, for example, or even to import multiple references at a time in Google Scholar, Web of Science, etc. Note that references imported using a browser add-in are only as good as the original on the internet and will need to be checked for accuracy, completeness, etc.
 3. If the reference you want to import to your Zotero library is a PDF file, you can right click the reference and click “Retrieve metadata for PDF” which will provide proper referencing for the article. If none of these options work, you will have to manually enter the reference in your Zotero library.
 - To get started with Zotero, also refer to the Quick Start Guide at https://www.zotero.org/support/quick_start_guide
 - Send the ECHO Network Research Manager the email address you will be using for your Zotero account – the Research Manager will invite you to the ECHO Network Zotero Library shared library with privileges to be determined based on your role in the ECHO Network (full ability to edit, view, etc.)

Steps to take after you have been given access to the ECHO Network library & **BEFORE (!) importing references into the library:**

Step 1. In your Zotero library (desktop version), create a sub-folder that serves as your “inbox” for new citations/references and they are reviewed, cleaned/corrected, and, if applicable, tagged. This will be in your own personal Zotero library folder for ECHO related references. Also create a folder with

‘tagged’ ECHO references, which are ready to be imported to the ECHO Network “References for Import” Zotero library folder.

Step 2. When saving a reference to Zotero, please ensure you check all the metadata Zotero downloads into your Zotero citation, including:

- Check capitalization/spelling/data errors that need to be corrected manually.
- Item type
- Title
- Author(s). (LAST NAME, FIRST NAMES). Names written in full. Please ensure to put the authors last name in the first box and the first names in the second box. No need for punctuation as the system will add it in. *Click a single box for authors such as the CDC.
- Publication (Journal Name)
- Volume/Issue/Page #
- Date published (YEAR-MM-DD). Include MM-DD if available.
- Abstract (if available)
- DOI (if applicable)
- Language
- URL (if applicable)
- Add article keywords (if not already included) to the extra section on the metadata form. Key words are not always necessary, focus on tags.

Step 3. To share a reference with the ECHO Network library from your **Zotero DESKTOP:**

- You must download the desktop version to share references with the ECHO library. It is not possible to share references to a group library on the online platform. The online platform can be used to upload references and tag them, but that is the extent of the online platform
- Set your Zotero preferences to ensure that file attachments are not copied when transferring files between libraries, to avoid possible legal/copyright repercussions (see below). To do this, open the ‘Edit’ drop-down menu in Zotero, select ‘Preferences’ and click on the ‘General’ icon/tab at the top of the window. In the ‘Groups’ box at the bottom of the window, where you see ‘when copying items between libraries, include:’ make sure to *un*check ‘child snapshots and imported files’. Alternately, just ensure you have deleted the PDF file attachments for journal articles which you want to add to the ECHO Network Zotero Library
- Drag and drop the reference(s) into the **References for Import** folder on the navigation pane on the left-hand side. If you don’t see this folder, please contact the ECHO Network Research Manager at echonetwork@unbc.ca.
- References in the References for Import folder will go through a quality control check before being moved into the ECHO reference library.

Step 4. To share a reference with the ECHO Network library from your **Zotero ONLINE** to **Zotero desktop:**

- You must sync the online and desktop Zotero. In the Zotero desktop, go to preferences tab, click on Sync, login with your Zotero login, and click Sync Automatically.
- References should then appear in both Zotero online and desktop. If required, close and reload the Zotero desktop application.

Best Practices: How to utilize Zotero

Below is a short list of tips and tricks about Zotero.

- Once you have completed the steps above, Zotero should be automatically embedded in your Word processor as a plugin. You should see a Zotero tab on the home page menu bar (Home, Insert, Draw, Design, ..., Zotero, etc).
- Always edit the metadata of each citation in the Zotero library folder. For example, if you have imported your reference list to your Word document and edit one of the citations because you noticed an error, despite saving your Word document, Zotero will refresh the reference list with the information directly from the Zotero library folder.
- If you right click on any of the citations in a Zotero folder, you can remove or delete them. “Move item to Trash” = Deletes the citation completely VS. “Remove from collection” will remove the citation from that specific folder but will remain in your master library.
- You can drag and drop PDFs from your desktop or downloads folder directly into Zotero. Zotero will then attempt to find the citation metadata for you.
- Desktop Zotero must be open and running on your computer so that you may use the browser extension to save your articles/reports/etc.
- The Zotero Connector for Google Chrome or Firefox is necessary to simplify your use of Zotero.
- It is possible to migrate existing reference libraries over to Zotero. Exporting references from EndNote, Mendeley or others into Zotero is very easy. It is more challenging, but still possible, to export references, PDFs, subfolders, and annotations. Start by exporting the bibliographic data from your other software program. Then, in Zotero, choose the “Import...” option from the File menu. Browse to your exported file, select it, and click the “Open” button. This should import the exported items into your Zotero library in a date-stamped collection.

For more help see: https://www.zotero.org/support/kb/mendeley_import,
https://www.zotero.org/support/kb/endnote_import, or search on Zotero.org for additional help.

List of Zotero Tags/How to Tag Your References

How to tag your references prior to importing them into the ECHO Network Zotero library:

Step 1. All references associated with a project in ECHO should have a project tag, thematic tag and a methodology tag. At least three tags need to be assigned to all references (including any other relevant tags).

- a. Add a tag for the ECHO project – label it according to the ECHO project on which you are working that the reference corresponds with; a list of project names will be agreed upon and updated regularly.
- b. * indicate a required tag.
- c. When adding tags include the identification number and letter, and the name of the tag.

Step 2. Process for untagged references.

- d. For any reference(s) which require new tags or a tag other than the existing tags, or if you are unsure of the tag description, please contact the ECHO Network Research Manager (echonetwork@unbc).
- e. Considering the additional of an “other” tag. To be approved.

High level categories	Low level categories	Tags (include the #, letter and the written name)	Description for clarification (only provided for some tags)
Sector/Type of extractive activity	Mining	1.a Mining	
	Oil & Gas	1.b Oil & Gas	
Affected Population	Workers	2.a Workers	
	Surrounding Communities	2.b Surrounding Communities	
	Indigenous Groups	2.c Indigenous Groups	
	Other racial or ethnic group	2.d Other racial or ethnic group	
	Migrants	2.e Migrants	
	Sex Workers	2.f Sex Workers	
	Children	2.g.i Children	
Youth	2.g.ii Youth		

	Males	2.h Males	
	Females	2.i Females	
	Seniors (60+)	2.j Seniors (60+)	
	General Public	2.k General Public	
Objective of Study* (Required tag)	Characterize health impacts	3.a Characterize health impacts	
	Characterize responses - Occupational health & safety intervention	3.b.i Occupational health & safety intervention	
	Characterize responses - Health promotion/education	3.b.ii Health promotion/education	
	Characterize responses - Diagnostic test or screening program	3.b.iii Diagnostic test or screening program	
	Characterize responses - Legal action	3.b.iv Legal action	
	Characterize responses - Regulation or policy	3.b.v Regulation or policy	
	Characterize responses - Social movement	3.b.vi Social movement	
	Characterize responses - Scientific dispute or advocacy	3.b.vii Scientific dispute or advocacy	
Type of Health Impacts	Mental or psychosocial, including trauma and stress	4.a Mental or psychosocial	
	Respiratory	4.b Respiratory	
	Cancer	4.c Cancer	
	Musculoskeletal	4.d Musculoskeletal	
	Infectious disease, STI	4.e Infectious disease, STI	
	Infectious disease, other	4.f Infectious disease, other	

	Genetic damage	4.g Genetic damage	
	Acute injury	4.h Acute injury	e.g. due to accidents
	Chronic injury	4.i Chronic injury strain	e.g. back pain or eye strain
	Disability	4.j Disability	
	Death	4.k Death	
	Well-being/quality of life	4.l Well-being/quality of life	
	Birth defects and pregnancy issues	4.m Birth defects and pregnancy issues	
	Other	4.n Other	
	Chronic disease	4.o Chronic disease	
	Poisoning (toxicity)	4.p Poisoning (toxicity)	
Geographic Area	Asia	5.a Asia	
	Europe	5.b Europe	
	South America	5.c South America	
	North America	5.d North America	
	Australia	5.e Australia	
	Africa	5.f Africa	
	Antarctica	5.g Antarctica	
	Oceania	5.h Oceania	
General Methodological approach* (Required tag)	Quantitative	7.a Quantitative	
	Qualitative	7.b Qualitative	
	Mixed Methods	7.c Mixed Methods	

	Historical	7.d Historical	
	Decolonizing	7.e Decolonizing	
	Indigenous	7.f Indigenous	
	iKT (Integrated knowledge translation)	7.g iKT	
	Developmental evaluation	7.h Developmental evaluation	
	Reciprocity	7.i Reciprocity	
	Arts-based	7.j Arts-based	
	Other	7.k Other	
Type of Impact pathways examined	Exposure to toxic substances	8.a Exposure to toxic substances	e.g. chemical or radiological
	Behavioral or social	8.b Behavioral or social	e.g. HIV risk, experience of trauma
	Ecosystem change	8.c Ecosystem change	
	Social determinants	8.d Social determinants	e.g. income, education, food insecurity, etc.
	Workplace accident or hazardous condition	8.e Workplace accident or hazardous condition	
	Occupation name	8.f [occupation name]	Tag must include the name of the occupation
	Disaster	8.g Disaster	e.g. flooding, fires, hurricane, etc.
Country	No country listed	10.a No country listed	
	Country name	10.b [country name]	For this tag use the country name. e.g 10b. Canada

	Multi-country	10.c Multi-country	If there is more than one country tag 10c. Multi-country and 10b. For each additional country. Example: Canada and the USA 10.b Canada 10b. USA 10.c. Multicountry
	Region name	10.d [region name]	Only use if 'region' is not one of our existing continent or region tags
World Bank Economy Classification	Low Income Country (LIC)	11.a LIC	* Please find spreadsheet with world bank economy classification in the Tagging Protocol Folder
	Low-middle Income Country (LMIC)	11.b LMIC	* Please find spreadsheet with world bank economy classification in the Tagging Protocol Folder
	Upper-middle Income Country (UMIC)	11.c UMIC	* Please find spreadsheet with world bank economy classification in the Tagging Protocol Folder
	High Income Country (HIC)	11.d HIC	* Please find spreadsheet with world bank economy classification in the Tagging Protocol Folder
Project tags* (Required tag)	Entrance interviews	20.a Entrance interviews	References related to entrance interviews conducted by Vanessa Sloan Morgan
	Entrance surveys	20.b Entrance surveys	References related to ECHO Network wide survey (meta-level activity)
	Arts-based and narrative tools	20.c Arts-based and narrative tools	
	Knowledge synthesis	20.d Knowledge synthesis	
	CANUE	20.e CANUE	CANUE project related refs.
Regional cases	NH	21.a NH	

	FNHA	21.b FNHA	
	BRWA	21.c BRWA	
	NBEN	21.d NBEN	
Tools	Indicator frameworks	22.a Indicator frameworks	
	Geospatial tools	22.b Geospatial tools	e.g., watershed mapping tool
	Arts-based and narrative tools	22.c Arts-based and narrative tools	e.g., Photovoice tool
	Assessment tools	22.d Assessment tools	e.g., health impact assessment
Working groups/teams	Research design	23.a Research design	
	Learning and Impact	23.b Learning and Impact	
	Equity	23.c Equity	
	Watersheds	23.d Watersheds	
	Capacity	23.e Capacity	
	GECHO	23.f GECHO	Data group
	Youth	23.g Youth	
Core concepts	Intersectoral action	24.a Intersectoral action	
	Mental health and wellbeing	24.b Mental health and wellbeing	
	Cumulative impacts	24.c Cumulative impacts	
	Resource development	24.d Resource development	
	Data management	24.e Data management	
	Monitoring and evaluation	24.f Monitoring and evaluation	

	Resource extraction	24.g Resource extraction	
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