

Zotero for beginners

USER GUIDE FOR ZOTERO 7

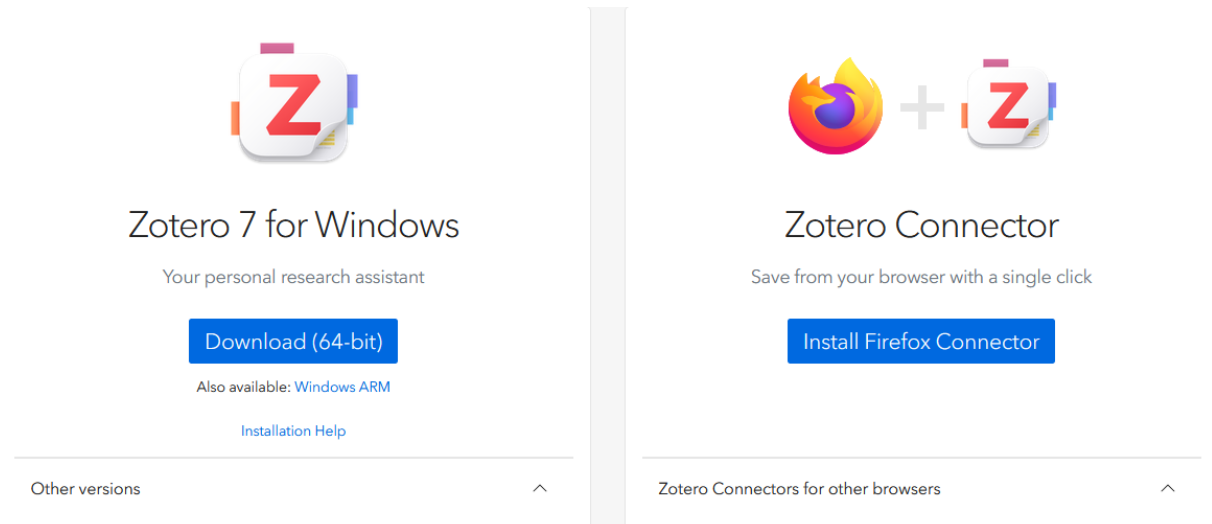
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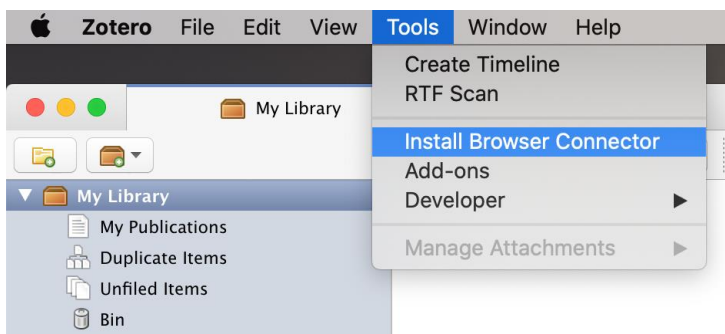
Zotero - Download

Zotero is a free, open-source reference management software. It helps you collect and organise documents, add citations, and create a bibliography.

The first step is to download the software from Zotero.org and add the connector. **If you are using a laptop licensed by Corvinus University, you might need the help of the IT to install the software correctly.** The software works well with various operating systems. The Connector helps you to save documents with one click. The browser provides the appropriate connector.

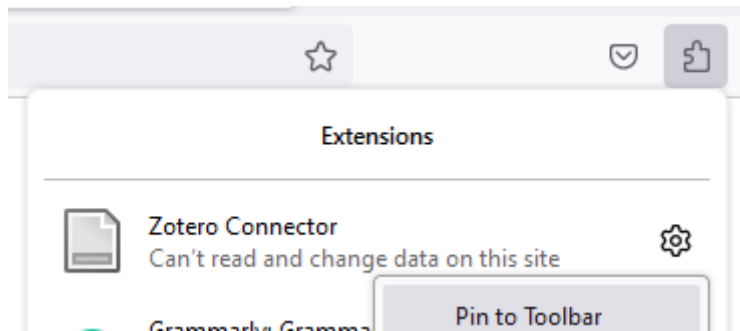


MAC users: The Safari browser may not work together with the Zotero Connector. We recommend using Chrome for browsing. Zotero itself offers the Chrome Connector:



Alternatively, you can try adding the connector to Safari from the Extensions pane in Safari Preferences (only works on the latest version of MAC OS).

Once downloaded, the software icon will appear on your desktop and the Connector icon will appear in the URL lane. If the icon does not appear in the URL lane, pin it to the toolbar:



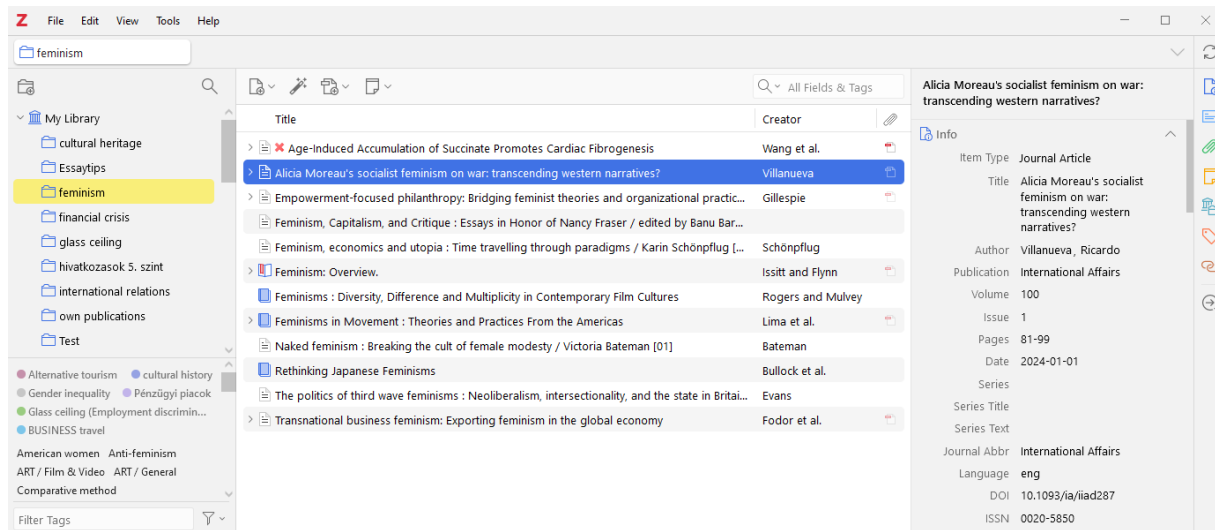
The shape of the connector depends on the content of the page: it can be a sheet of paper, a folder, a microphone, etc.

Zotero's interface language is the same as your browser's. If you want some alternatives, choose from the available languages in Edit/Settings/General.

Storage


Zotero comes with 300MB of free storage. This can be increased for an [additional fee](#). It is important to note that only full-text pdfs use much storage, not the metadata. Full-text pdfs, when downloaded, are stored on your PC for offline access. When synchronising, you can choose whether to upload pdfs to the cloud. For more information, see chapter [Registration and Synchronisation](#).

Zotero's platform



Left column: Basic folders appear under manually created ones:

- My publications: Here you can add your own documents, from which Zotero will create a bibliography and make publicly available on the Zotero.org website.
- Duplicate items: If you accidentally downloaded the same documents more than once, Zotero collects them here. To merge the items, click the Merge button in the right pane.
- Unfiled Items: any documents that have not been placed in separate folders are stored here.
- Bin: Anything you no longer need that has been placed here. Items can be recovered until they are deleted from the Bin.

To create a new folder, click on the first icon: (New Collection):  and give it a name. You can create sub-directories, rename existing ones, delete unnecessary ones (right-click on folders).

Middle column: here you will find the bibliographic data (metadata) of the documents you have downloaded. By clicking on the small triangle in front of a document, you can see what is attached to it (full text, URL, annotations, etc.).

Right column:

- Info: the metadata (bibliographic data) that Zotero uses to generate citations. All rows can be edited manually.
- Abstract: shows the abstract of a document (if available).
- Attachments: fulltext, links, annotations, anything that has been attached to the metadata.
- Notes: additional information added to a document which Zotero stores.
- Tags (keywords, subject headings): added by the search engine, publisher, author or privately. All are searchable in the lower left pane below the folders.
- Libraries and collections: shows the location of the metadata.
- Related: links documents that belong together, e.g. book-book chapter, conference volume-proceedings.
- Locate: several functions in one. Opens the full-text pdf in a new window, and searches the original document in CUB collection (*Library Lookup, see Zotero Advanced*) or in Google Scholar or in CrossRef.

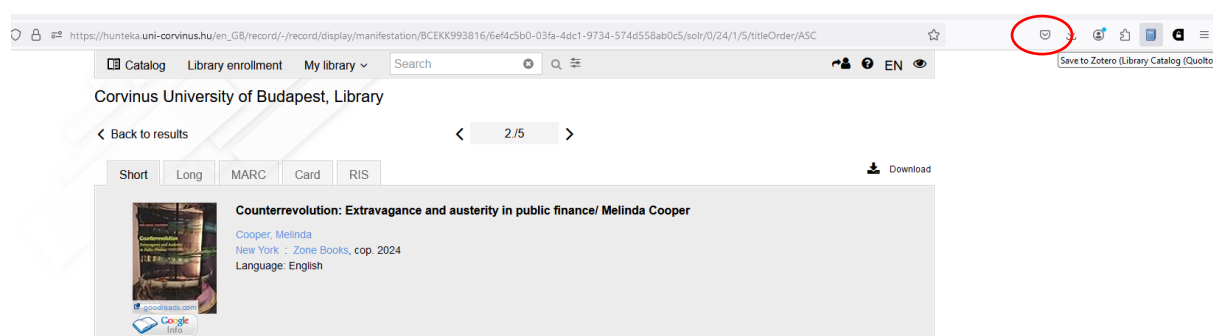
Downloading documents

You can download documents from almost any website, including library catalogues, SuperSearch, GoogleScholar, databases, etc. Zotero must be open to save. If you want to save to a specific location, highlight it.

Examples of saving:

Library Catalog

1. You can use the Connector to download records from the catalogue. Open the record and click on the Connector, which automatically saves the record to Zotero.



SuperSearch

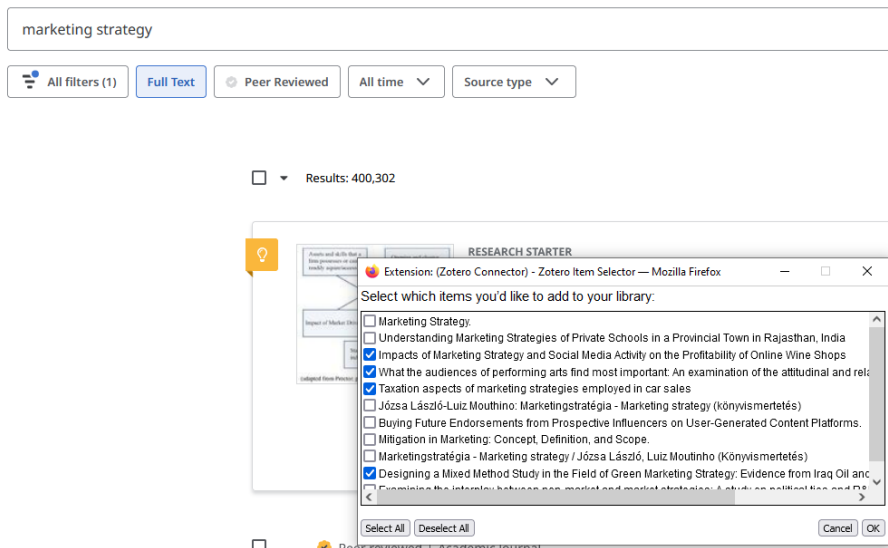
Connector works well from SuperSearch. One or more records can be downloaded at the same time.

- A) Download one record: click on the document title, open it, then click on Connector (looks like a sheet of paper):



- A) Downloading multiple records at the same time:

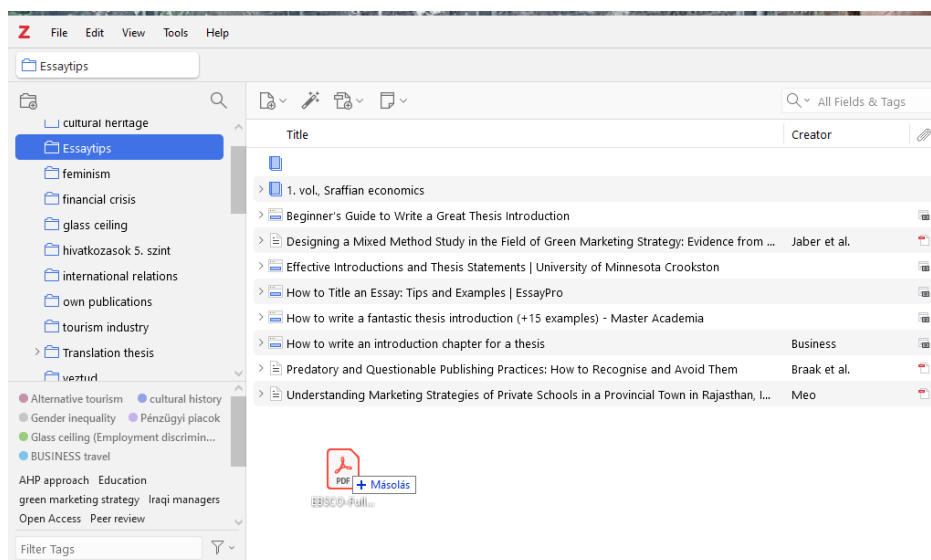
After a search in SuperSearch, click on the Connector icon, as there are several documents on the page, the icon forms a folder. From the pop-up window, select the documents you wish to download:



Alternative ways of downloading documents from SuperSearch

1. Download pdf, retrieve metadata

Download the PDF to your desktop and drag and drop it into the centre column:



PDFs alone are not sufficient for citation purposes; you also need the bibliographic data (metadata). Zotero has a built-in metadata retriever that can, in most cases, extract the necessary data from PDF files. This only works for pdfs that are so-called double-layered pdfs (most pdfs on the web are of this type). If a PDF is created by scanning from a book, it will not contain the metadata. In this case, you have to enter the data manually: right-click and select "Create parent item...".

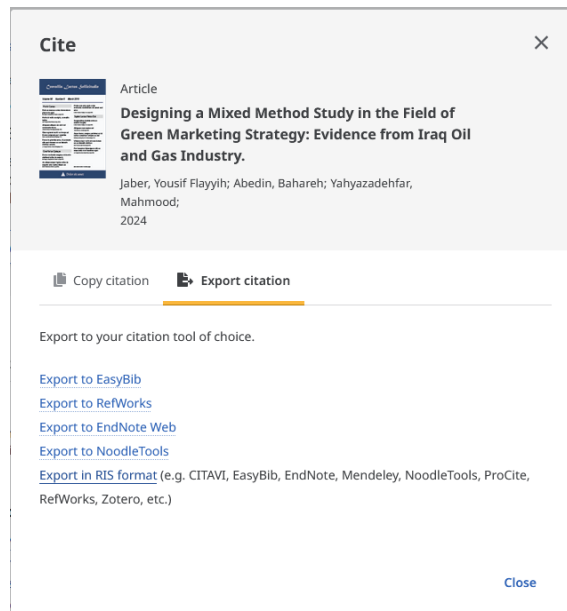
Saving individual articles as .ris-file

You can find Tools/Cite next to the article:



The screenshot shows an article titled "Examining the interplay between non-market and market strategy study on political ties and R&D investment." The article is peer reviewed and from an Academic Journal. A dropdown menu is open next to the article, showing options: Cite, Add to project, Share, and Download. Below the article title, there is a summary, subjects (Research & development; Marketing strategy; Investment management), published in (Corporate Management Review, 6/30/2024), database (Business Source Complete), and authors (Cheng-Yu Lee; Hsueh-Liang Wu; Menghang Dong). There are buttons for "Access now (PDF)" and "View details".

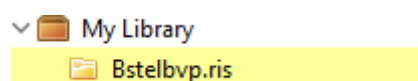
Select Export citation/Export in .ris file



The screenshot shows a "Cite" dialog box with a close button (X) in the top right corner. It displays the article title "Designing a Mixed Method Study in the Field of Green Marketing Strategy: Evidence from Iraq Oil and Gas Industry" by Jaber, Yousif Flayyih; Abedin, Bahareh; Yahyazadehfah, Mahmood; 2024. Below the article information, there are two tabs: "Copy citation" and "Export citation". The "Export citation" tab is selected. Underneath, it says "Export to your citation tool of choice." and lists several options: "Export to EasyBib", "Export to RefWorks", "Export to EndNote Web", "Export to NoodleTools", and "Export in RIS format (e.g. CITAVI, EasyBib, EndNote, Mendeley, NoodleTools, ProCite, RefWorks, Zotero, etc.)". A "Close" button is located at the bottom right of the dialog box.

This method sends metadata directly to Zotero. Pdfs can be attached to them with Right Click/Add Attachment/Attach saved copy of file.

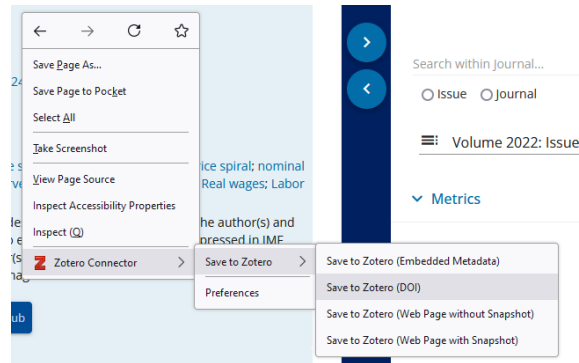
If you want to download multiple articles at once, first save them to your Dashboard. From there, select the ones you need and import them into Zotero as a .ris file using the File/Import function in Zotero. The exported file will be placed under folders, such as:



Troubleshooting

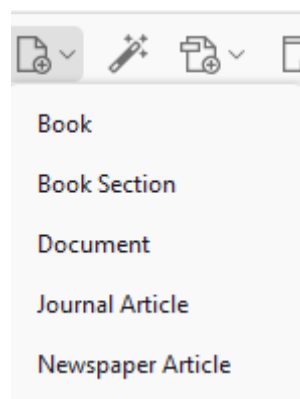
A) If Connector fails:

1. right-click on the page, Zotero, select the form you need:

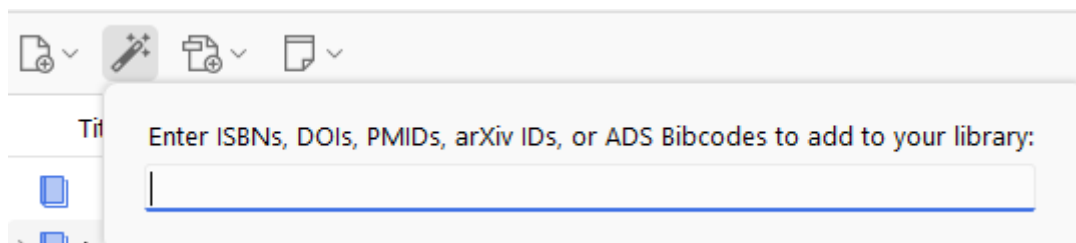


B) If all else fails: manual data entry

In Zotero, click on the first icon with a plus on it, select the document type you need and fill in the data in the right-hand column:



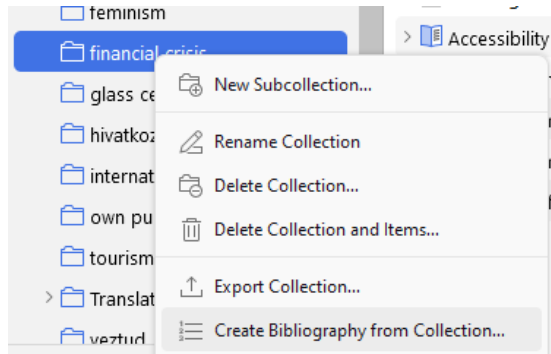
If you click on the next icon (Add item(s) by Identifier), Zotero will search for ISBN, DOI, or any other ID and in most cases finds the metadata and loads the required document:



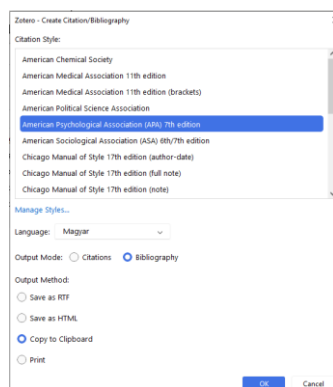
Creating a Bibliography

1. If you were making a bibliography of a collection:

Right click on the collection's name, 'Create bibliography from collection':



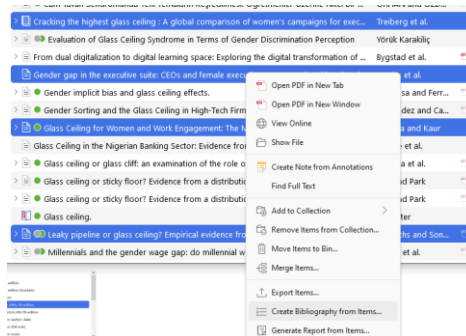
In the pop-up window, select the required reference style, tick Copy to clipboard option and OK:



Open a word processor, CTRL+V to insert the bibliography.

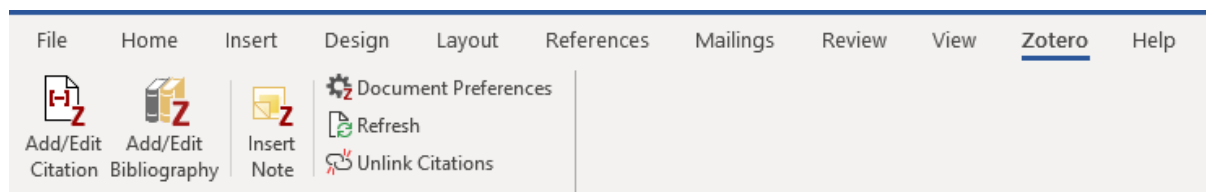
If some of the items in the collection were to be made into a bibliography:

Select them (using CTRL), right-click, "Create bibliography from items", then the previous steps: style selection, copy to clipboard, CTRL+V.



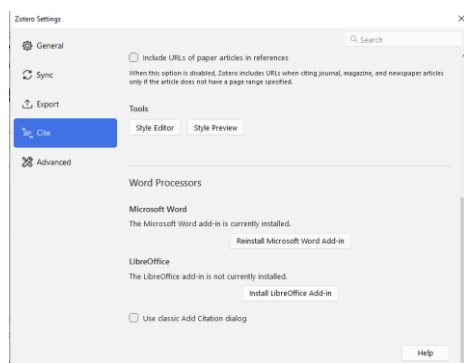
Cite-while-you-write plugin (Inserting citations while writing the text)

With this plugin you can insert citations while writing your paper. First, check whether the word processor has the Zotero tab.



If not, reinstall it: Zotero, Edit/Settings/Cite, scroll down until Word Processors/Reinstall Microsoft Word Add-in:

Important: all word files must be closed before installing the add-on.



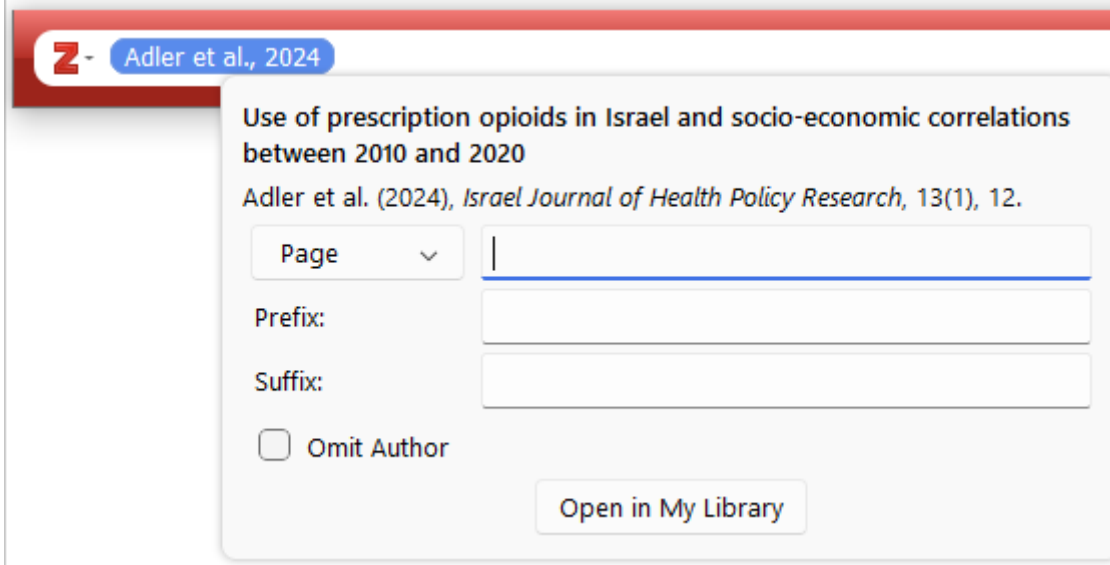
Start writing your text, if you need a citation, click on the first icon (Add/Edit Citation), select the citation style, then OK:

- a) A red oval bar appears. Here you can enter the words that appear in the documents you have saved, all of which contain the characters you have entered.



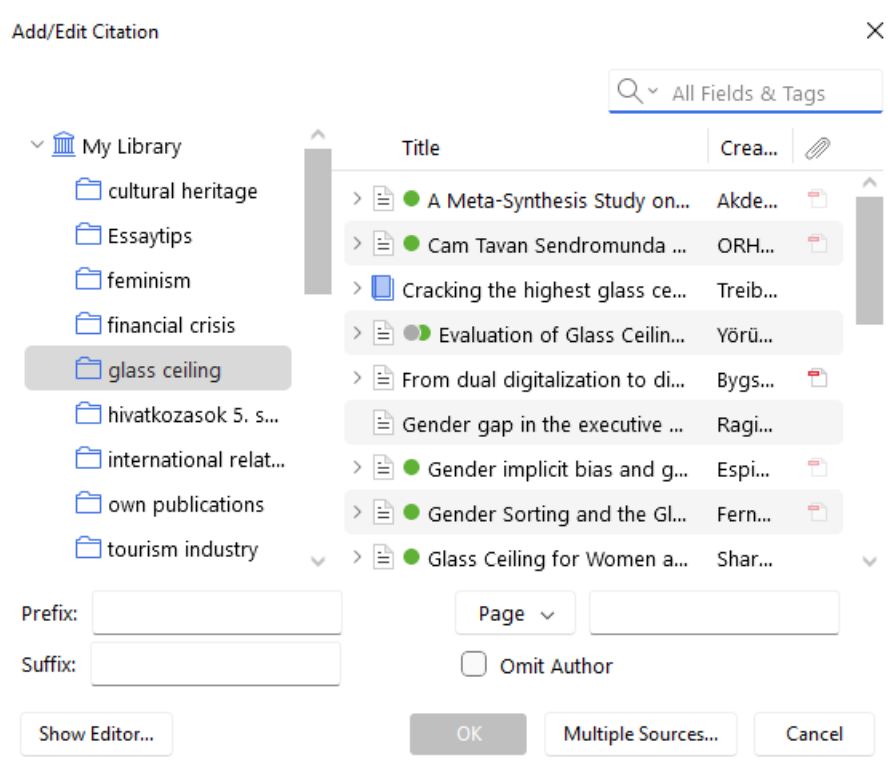
Select the one you want to use, click Enter and it's inserted. If you want more than one quote to go in the same place, do not press Enter after selecting the first one, but type another word, find the quote you want and you want and press Enter.

To insert a page number, click on the quotation before pressing Enter, a pop-up window appears.



Once you have all the necessary citations, click on the 2nd icon - Add/Edit bibliography - to insert the bibliography. All references used in the text will be included.

- b) If you do not remember the documents you've saved, when the red oval bar appears click on the little triangle next to the letter Z letter, then click on Classic view. Result:



You can also select the documents you need from here. If you need more citations on the same place, you can set them by clicking on More sources.

When you create a narrative citation, the author is embedded in the text, so the in-text citation needs to include only the year of publication, e.g. *Walters (2003) wrote that...* To get a correct citation, check the *Omit author* option. When you do this, Zotero will treat it as a correct citation and include it in the citation list.

Other icons:

Insert Note: Insert a new note at the current cursor position

Document preferences: You can change the citation style at any time during or after the editing process. Simply click on an inserted citation and select Document preferences - New style.

Refresh: If you change data in Zotero (adding more authors, changing the year of publication etc.) and you have already used that document, clicking the Refresh button will show those changes.

Unlink citations: Zotero uses codes to insert citations. Clicking this button will disconnect Zotero from the document. **Warning: this process is irreversible!** Only use it when you are completely finished. The best way to do this is to make a copy of the entire document and remove the codes from the copy. If you still need to make some updates, you can use the original version.

So why is it useful?

- If you want to make manual changes to your bibliography, it is better to do so when there is no active connection between Zotero and your word processor.
- It's either recommended or required by many journal publishers to remove Zotero codes before submitting a manuscript, as Zotero (and other) fields can interfere with publishing and manuscript management systems.

Registration and Synchronisation

The benefits of registering are

1. You can create group libraries for collaborative work.
2. If you need technical help, developers and other users can help you in the forums.
3. Synchronisation: saved documents are also stored in the cloud, so if you change your computer, your data won't be lost. You can register in Zotero.org and group libraries can be set also here.

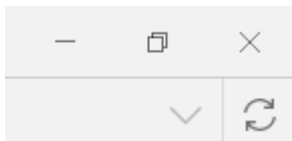
Synchronisation: very useful if you use not only your PC but also a common computer (e.g. PCs in reading halls).

Enter the data you have used at registration here: Edit/Settings/Sync.

Synchronisation is divided into two parts: Data Syncing and File Syncing

Data Syncing:

- If checked, Zotero will upload your newly downloaded data to the cloud almost immediately. If unchecked, you can still sync manually by clicking the little double arrow (top right corner):



- Sync full-text content: notes, annotations added to the document will also be synchronized

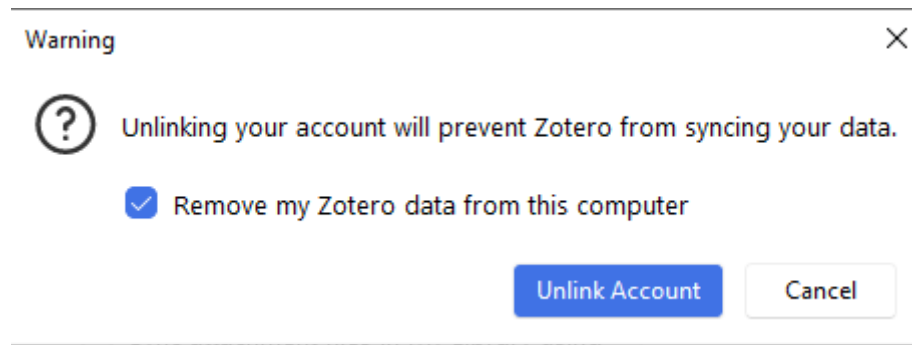
File syncing

This adjusts uploading pdfs:

- Sync attachment files in my Library...: if checked, pdfs will be uploaded automatically. As you may have read at the section [Storage](#), pdfs use the available storage space. If you want to save space, do not send pdfs to the cloud, as they will also be stored on your computer. However, if you have been using a different computer and have collected new pdfs, you can temporarily upload them to the cloud so that you can download them to your own computer later.
- Sync attachment files in Group Library: if you create a group library, all members will use your storage space. It is recommended that you upload pdfs during the collaborative work to give all members access to the full text, and then delete them when the project is finished. This can be done in Zotero.org, after logging in, under Settings/Storage, using the *Purge Storage in my Library* button. **Be careful: this will delete all uploaded pdfs, including your personal pdfs if you have uploaded them.** Before deleting, uncheck the File Sync option in Zotero to disable syncing.

Important: If you are using a machine that is shared with others (for example, a PC in the library reading room), after synchronising, disconnect your account and delete your documents from that machine:

- Settings - Sync - Unlink account
- Tick the box in front of "Remove my Zotero data from this computer."
- Unlink account



More information:

https://www.zotero.org/support/quick_start_guide