Zotero

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 downloading the software from zotero.org and adding the connector. **If you use a laptop licensed by Corvinus University, you might need to ask the IT Helpdesk for help with the installation.** The software works well with various operating systems. The Connector helps you save documents with one click and contains the word plugin. The browser provides the appropriate connector.
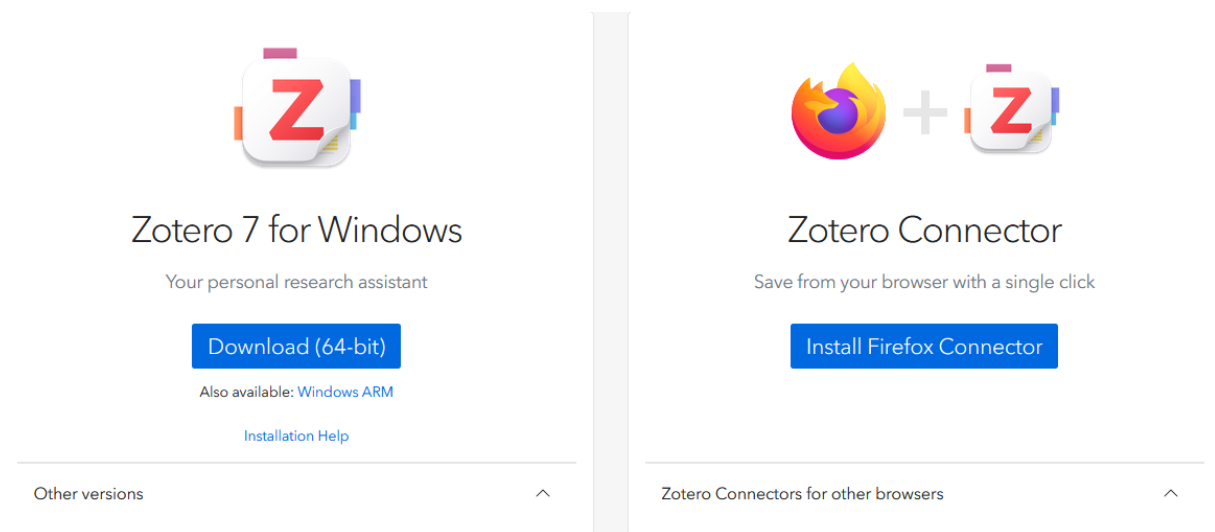

MAC users: The Safari browser may not work with the Zotero Connector. We recommend using Chrome for browsing. Zotero provides and adds the Chrome Connector itself:
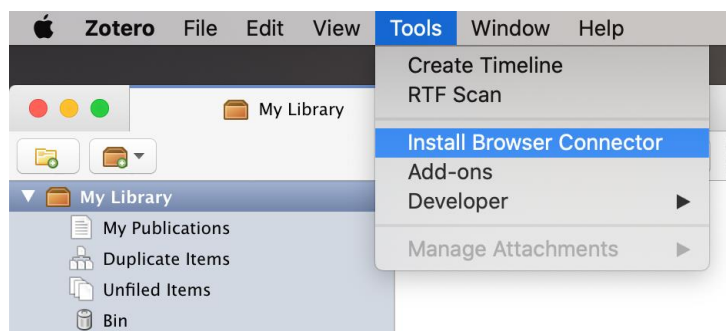
Alternatively, you can try adding the connector to Safari from the Extensions pane in Safari Preferences (it only works on the latest version of MAC OS).

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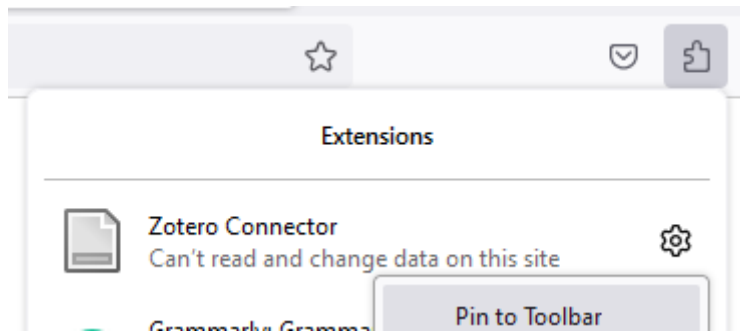
The shape of the connector depends on the content of the page: it can be a sheet of paper, a folder, a microphone, etc.

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/Appearance and Language.

It is essential to know that the built-in translator also translates the additional information related to bibliographic data (Eds., page etc.). Check Hint 1 in chapter Cite-while-you write-plugin to avoid anomalies at Document Preferences.

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 storage, not the metadata. Full-text PDFs, when downloaded, are stored on the user's PC for offline access. When synchronising, you can choose whether to upload PDFs to the cloud. For more information, see the Registration and Synchronisation chapter.

Basic functions

Zotero's platform
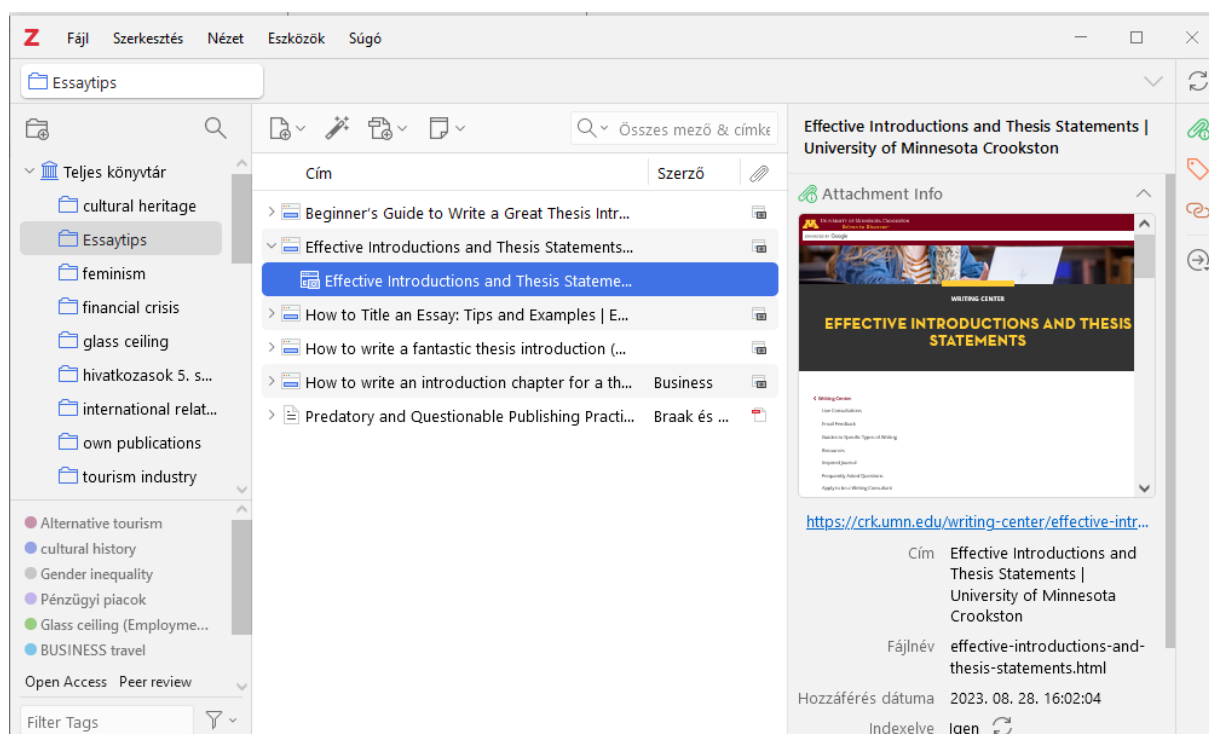
Left column: Basic folders appear under manually created ones:

- My publications: Here you can add your documents, which Zotero will create a bibliography from and make publicly available on the Zotero.org website. For further information check My publications-chapter.
- Duplicate items: Zotero collects multiple downloaded items here. To merge them, click the Merge x items - button in the right pane.
- Unfiled Items: documents not 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, and delete unnecessary ones (right-click on folders).

Middle column: here, you will find the downloaded documents. You can see what is attached (full text, URL, annotations, etc.) by clicking on the small triangle in front of a document.

Right column:

- Info: Zotero's metadata (bibliographic data) to generate citations. All rows can be edited manually.
- Abstract: shows the abstract of a document (if available).
- Attachments: full text, links, annotations, anything that has been attached to the metadata
- Notes: Additional information was added to a document that Zotero stores.
- Libraries and collections: shows the location of the documents.

- Tags (keywords, subject headings): added by the search engine, publisher, author or privately. All are searchable in the lower left pane below the folders.
- Related: links documents that belong together: 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-function - or in Google Scholar.
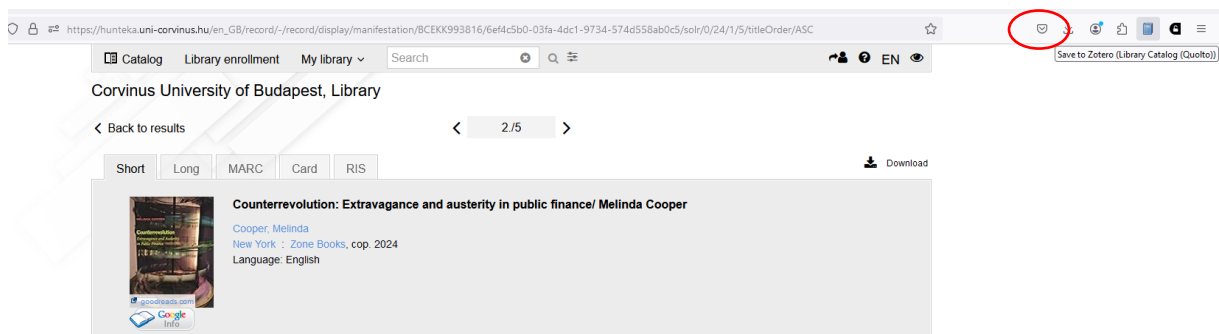
Downloading documents

You can download documents from almost any website, including library catalogues, SuperSearch, Google Scholar, databases, etc. Zotero must be open to save. If you want to save to a specific folder, 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.
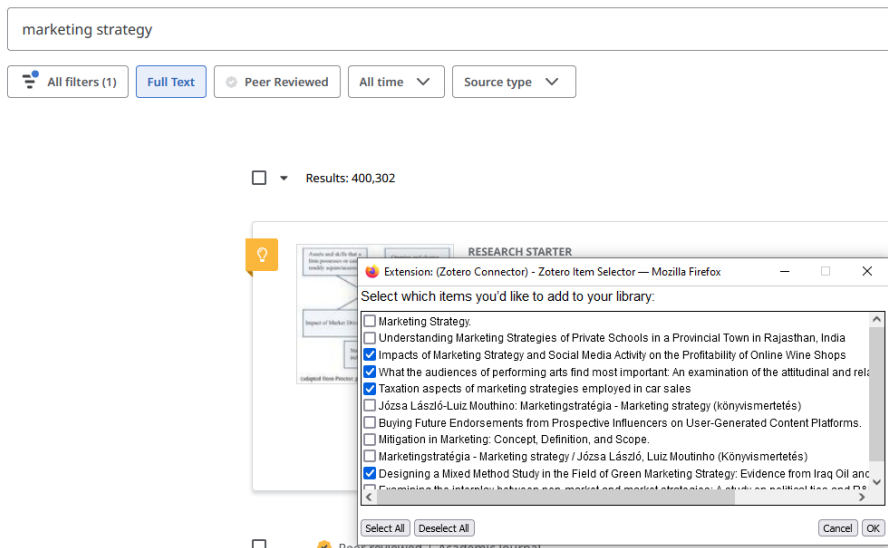

SuperSearch

The 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):
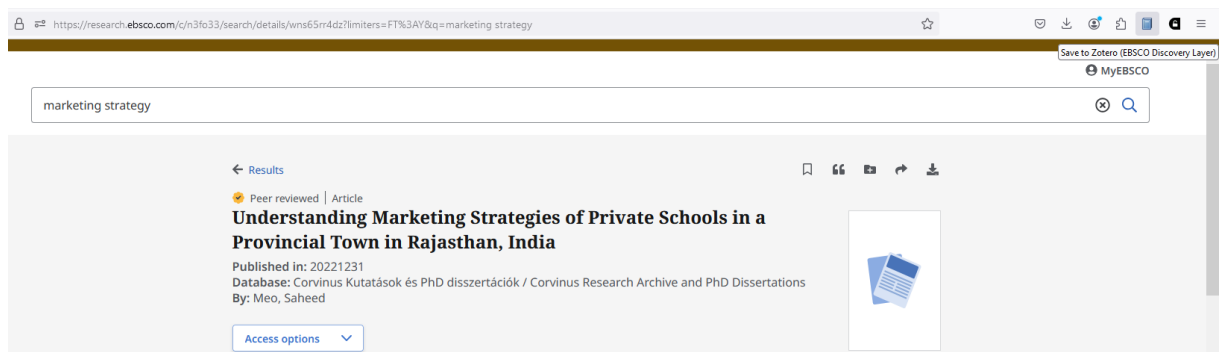
A) Downloading multiple records at the same time:

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

Alternative ways of downloading documents from SuperSearch

A) Download PDF, retrieve metadata

Download the PDF, to your desktop and drag and drop it into the centre column:
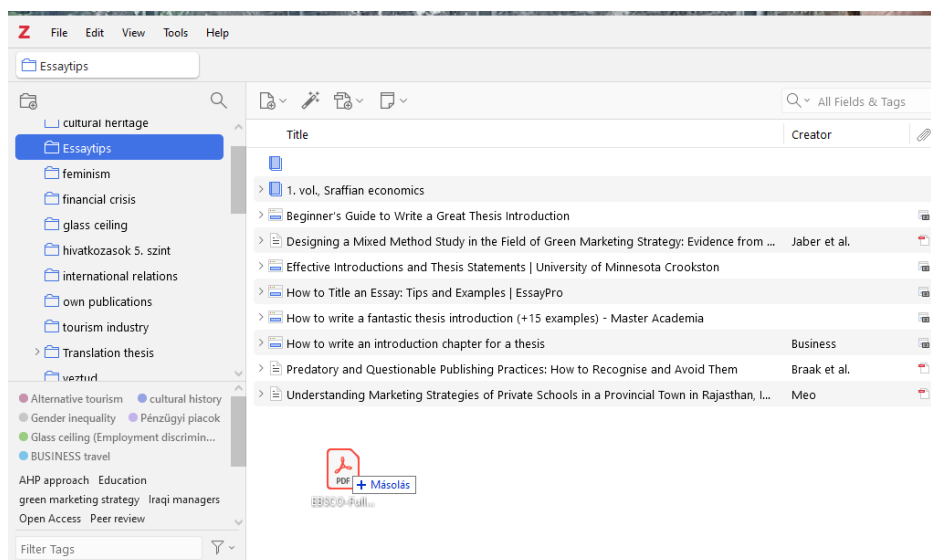
PDFs alone are insufficient for citation; you also need the bibliographic data (metadata). Zotero has a built-in metadata retriever that can, in most cases, extract the necessary data from PDF files. This only works for so-called double-layer PDFs (most PDFs on the web are of this type). If a PDF is created by scanning a book, it will not contain the metadata. In this case, you must manually enter the data by right-clicking and selecting *"Create parent item..."*.
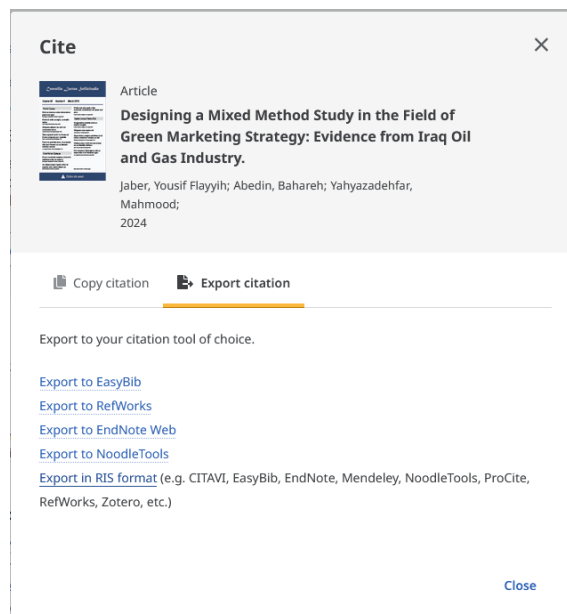
B) Saving individual articles as .ris-file

You can find Tools/Cite next to the article:

Select Export citation/Export in the .ris file.

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

If you want to download multiple articles simultaneously, save them to your Dashboard. Select the ones you need from there and import them into Zotero as .ris file using the File/Import function in Zotero. The exported file will be placed among folders:
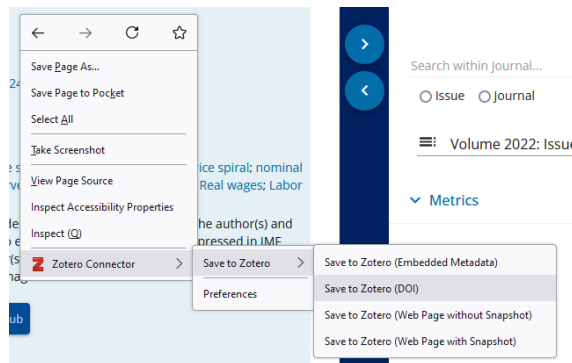
Troubleshooting

A) If the Connector fails:

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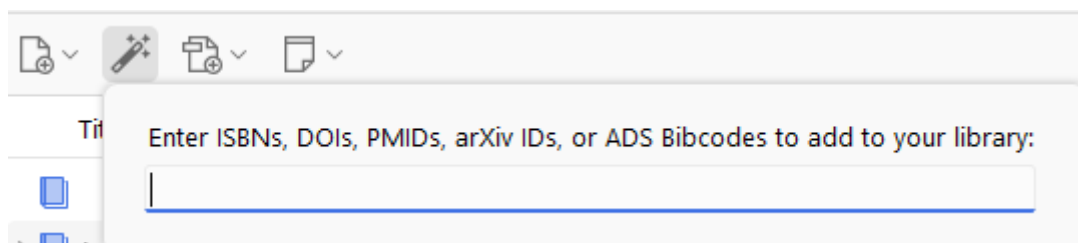

B) If all else fails, manual data entry

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:
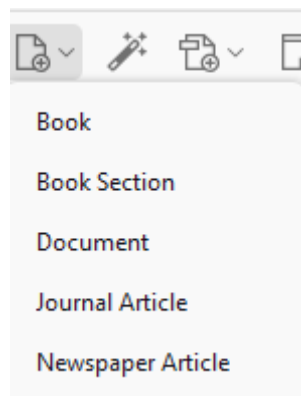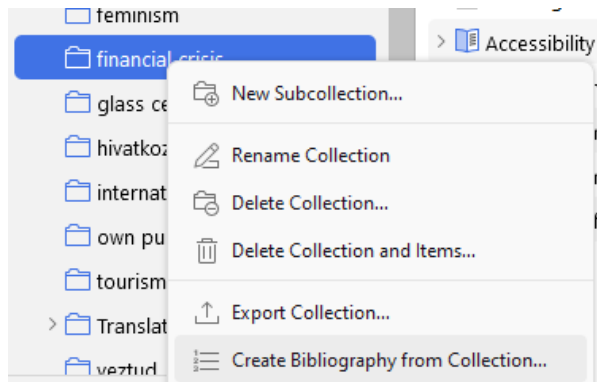

If you click on the next icon (Add item(s) by Identifier), Zotero will search for ISBN, DOI, or any other ID and, in most cases, finds the metadata and loads the required document:

Creating a Bibliography

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

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

In the pop-up window, select the required reference style, tick Copy to clipboard option and OK:
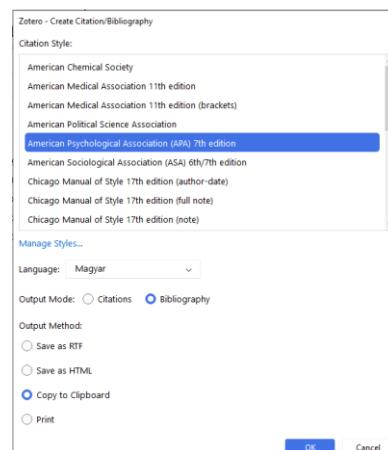
Open a word processor, CTRL+V, to insert the bibliography.

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

Select them (using CTRL), right-click, "Create a bibliography from items", then repeat the steps in point 1: 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 when writing your paper. First, check whether the word processor has the Zotero tab.
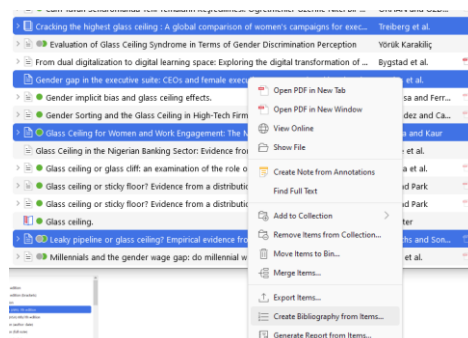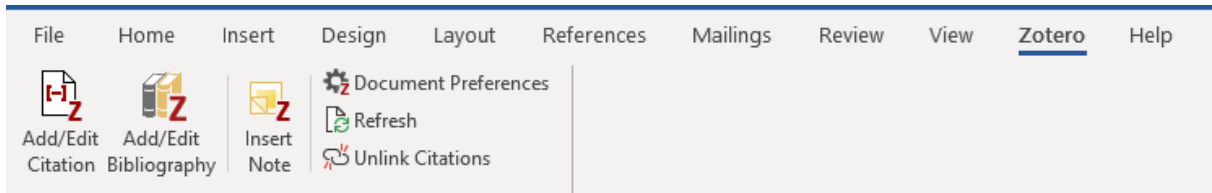

If not, reinstall it:

- Zotero, Edit/Settings/Cite
- scroll down until Word Processors/Reinstall Microsoft Word Add-in. **Close all word-documents before installing.**
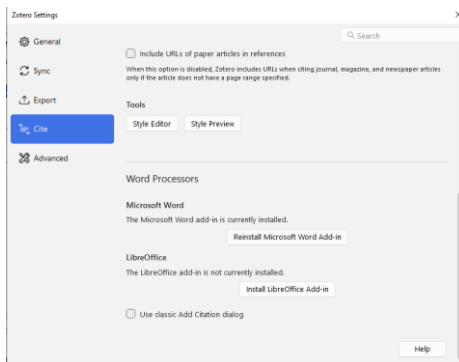
Start writing your paper; if you need a citation, click on the first icon (Add/Edit Citation), select the citation style, and then OK:

a) A red oval bar appears. Here, you can enter the words in the saved documents, all containing the characters you have entered.

Please select the one you want to use, 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 press Enter.

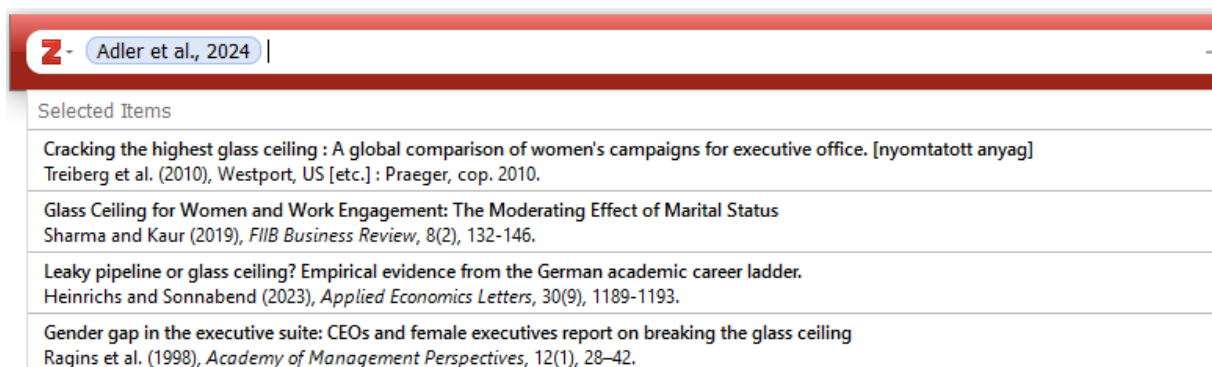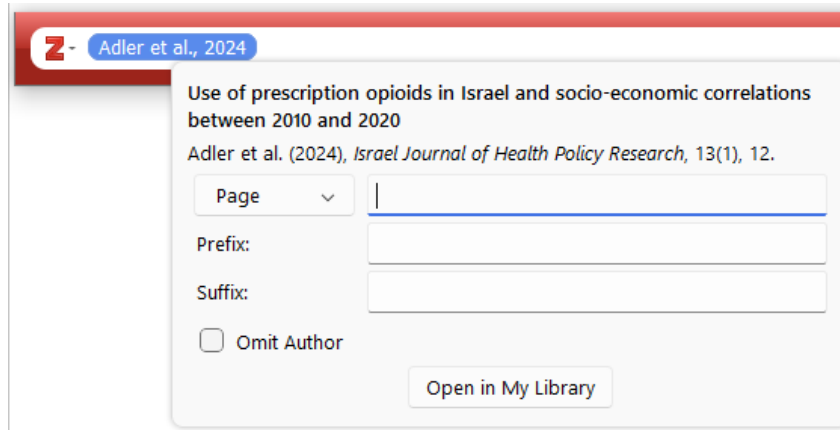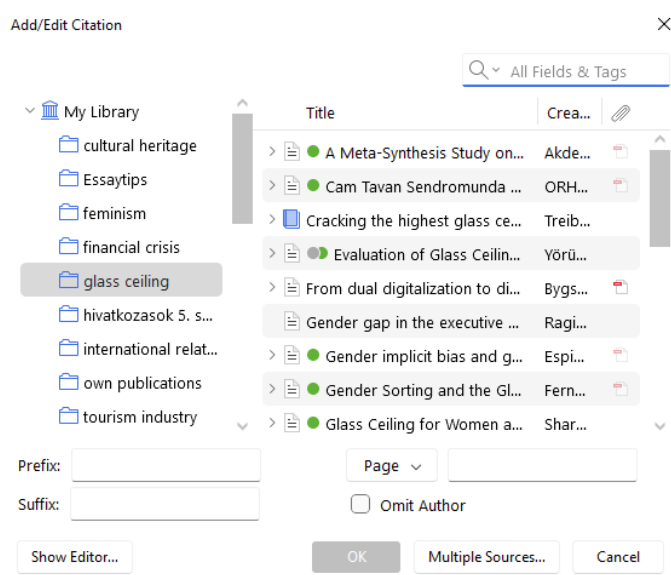To insert a page number, click on the quotation before pressing Enter, and a pop-up window appears:

Once you have all the necessary citations, click 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, click on the little triangle next to the letter Z letter when the red oval bar appears, then click on Classic view. Result:

You can also select the documents you need from here. If you need more citations in 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 proper 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 during or after editing. Simply click on an inserted citation and select *Document Preferences - New style*. Here, you can also change the language of additional information related to bibliographic data (eds., page, etc.)

Hint 1:

A new function has been built into Zotero that automatically translates the additional information to a given language causing mixed bibliography record:

Aron, L., Botella, M., & Lubart, T. (2019). Culinary arts: Talent and their development. In R. F. Subotnik, Olszewski-Kubilius, P., & Worrell, F.C. **(Szerk.***),* *The psychology of high performance: Developing human potential into domain-specific talent* (**o.** 345–359). American Psychological Association. https://doi.org/10.1037/0000120-016

To avoid problems like this, change the language in Word at Zotero/Document Preferences to the preferred one:
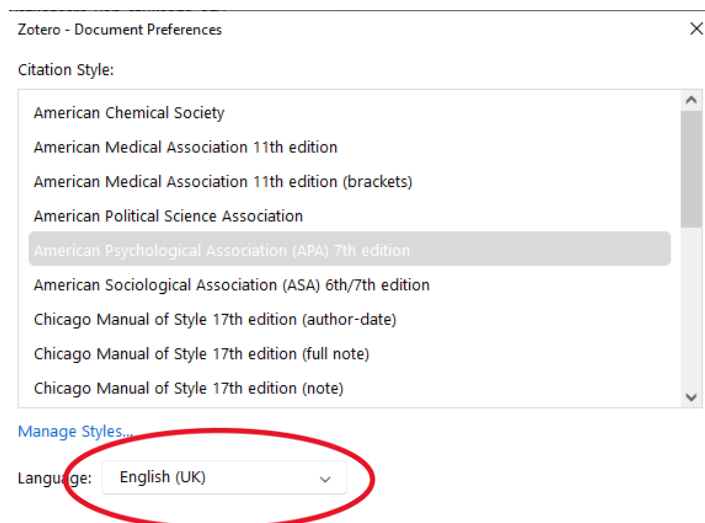
Refresh: If you change data in Zotero (adding more authors, changing the year of publication, etc.) and have already used this document, clicking the Refresh button will show those changes.

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 finished. The best way to do this is to make a copy of the entire document and remove the codes from that copy. You can use the original version if you need to update it and you are 100% sure that you do not want to revise the document again.

So why is it useful?

- If you want to change your bibliography manually, it is better to do so when there is no active connection between Zotero and your word processor.

- Many journal publishers either recommend or require the removal of Zotero codes before submitting a manuscript, as Zotero (and other) fields can interfere with publishing and manuscript management systems.

Hint 2:

In order for Zotero to correctly display the authority data (authors and editors) of an edited book chapter, do the following:

Enter all authors and editors into the Author field (you can add more lines by clicking on +), and change the necessary lines to Editor by clicking on Author:
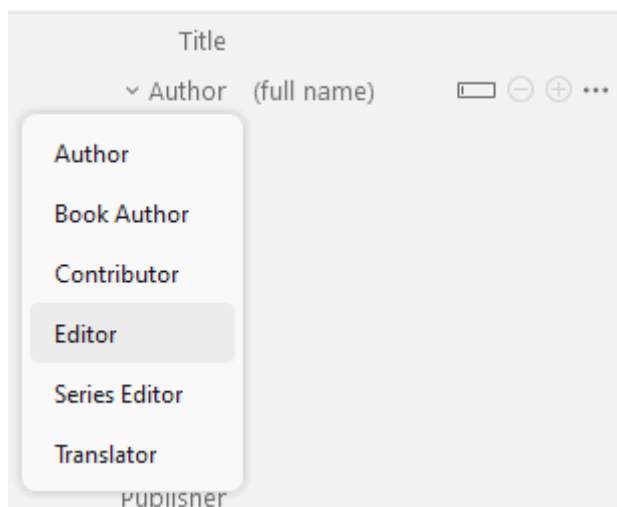
Registration and Synchronisation

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 Forum.

3. Synchronisation: saved documents are also stored in the cloud, so your data won't be lost if you change your computer.

Registration and creation of group libraries must be done on Zotero.org.

Synchronisation: beneficial if you use not only your PC but also a shared 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-tet content: notes and annotations added to the document will also be synchronised

File syncing

This adjusts uploading PDFs:

- Sync attachment files in my Library…: pdf will be uploaded automatically if checked. As you may have read in 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 to download them to your computer later.

- Sync attachment files in Group Library: All members will use your storage space if you create a group library. You should 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 turn off 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
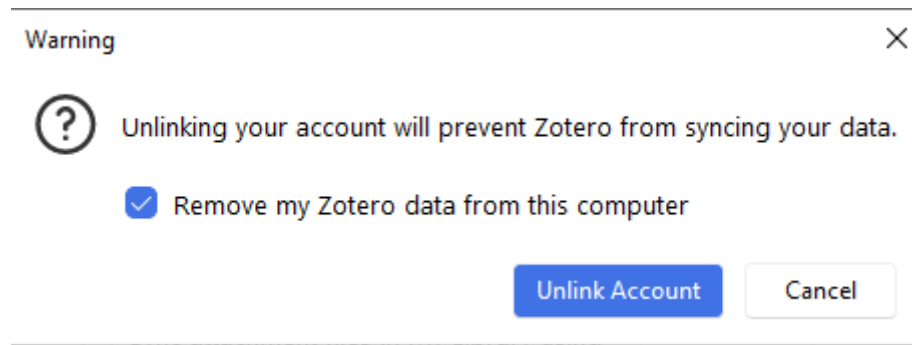
More information:

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

Additional functions

Colour coding

Colour coding is a categorisation method that makes it easy to scan your library for documents with a specific tag quickly. Coloured tags are shown at the top of the tag selector and are always visible (even if not assigned to any visible items).
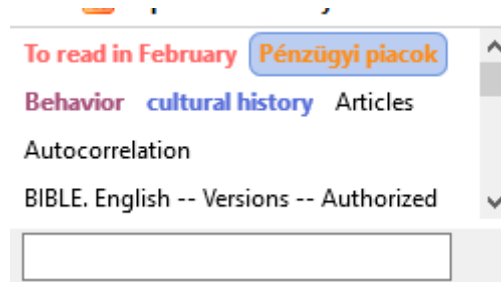
If you categorise a document with a coloured tag, a small coloured square will appear in front of the title.

How to do it:

- Go to Tag selector (left bottom part)
- Right-click on a tag, assign a colour and then set the colour to 9 colours. Each coloured tag is also assigned a number corresponding to its position at the top of the tag selector. Zotero can handle a maximum of 9 coloured tags.

To quickly add/remove a tag to/from a document, click on the document and press the tags' assigned number (position). If the document does not have it, it will be added; if there is, it will be removed.

Colours and positions can be changed with a right click, such as Assign colour.

Pdf editing

Although a unique PDF editor has been made for Zotero (ZotMoov), it is unnecessary to download it since Zotero has a built-in editor.

To create and extract an annotation do the following:

Open a PDF in Zotero, highlight the necessary information, and make notes. It will be saved in the same place as the original file. Go back to Zotero, right-click on the pdf (centre part), choose Add Note from Annotations:
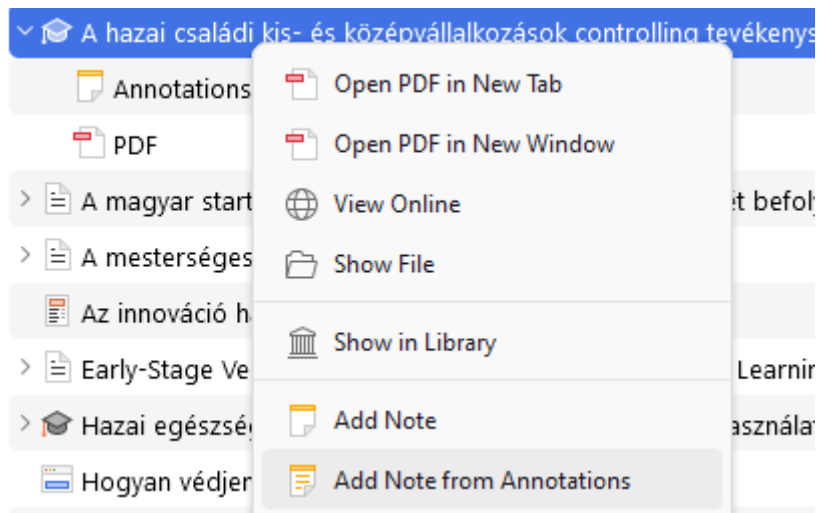
Uploading your publications - My publications

You can upload your publications to Zotero's platform, and Zotero will automatically create a Bibliography from them. To upload your publications, download them into a randomly selected folder and then drag them to My Publications. At this point, Zotero will ask whether the publications belong to you and whether you want to upload the full text. If you missed attaching PDFs, delete the item and upload it again. Your bibliography will be openly available.
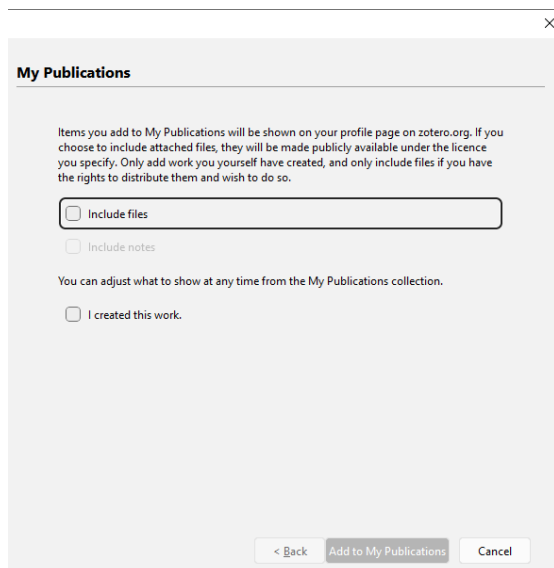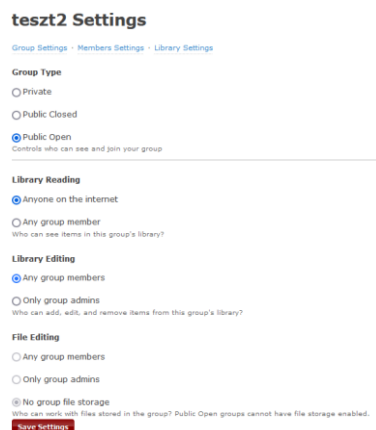
Creating Group Libraries

To create group libraries, log in to Zotero.org (online). After logging in, click on Groups/Create a New Group.
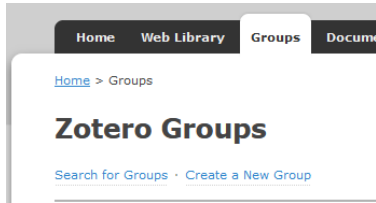
Define what type of groups you want to create (open, closed, etc.)

You will be the group's administrator; you can provide rights for the members.

In case of a closed group, invite the members one by one.

- After you have created the group, click on the Members setting and enter the e-mail addresses of the invited users into the empty box.
- Click on Invite members. Invited members will get a notification, they approve it, and the group will also appear on their Zotero platform.
- It is essential to know that uploaded PDFs will use the Admin's storage. For details on [storage](#) and [synchronisation](#), check the appropriate chapters.

Open URL – link resolver

OpenURL is a link resolver; it helps you check whether a specific document's full text (if not found on the internet) is available in the CUB Library's collection.

The resolver to our collection is http://resolver.ebscohost.com/openurl

Put it in Zotero: Edit/Setting/General/Locate– OK
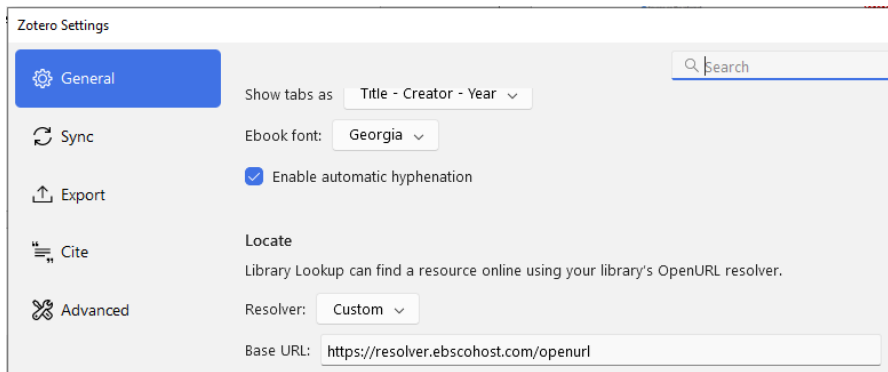
Usage: select a document, then Library lookup (small grey arrow at the bottom of icons in the right):
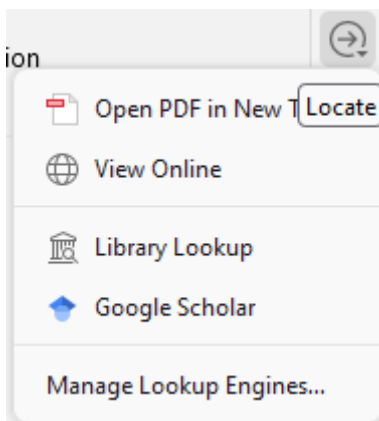
If you find the full text and want to add it to the title, right-click on an item and add as an attachment.

Retraction Watch

Automatically integrated plugin for tracking retracted articles in cooperation with the Retraction Watch initiative. If you happen to download retracted articles, they will get a 'red x', and if you want to insert them into your paper, it sends you a warning message:
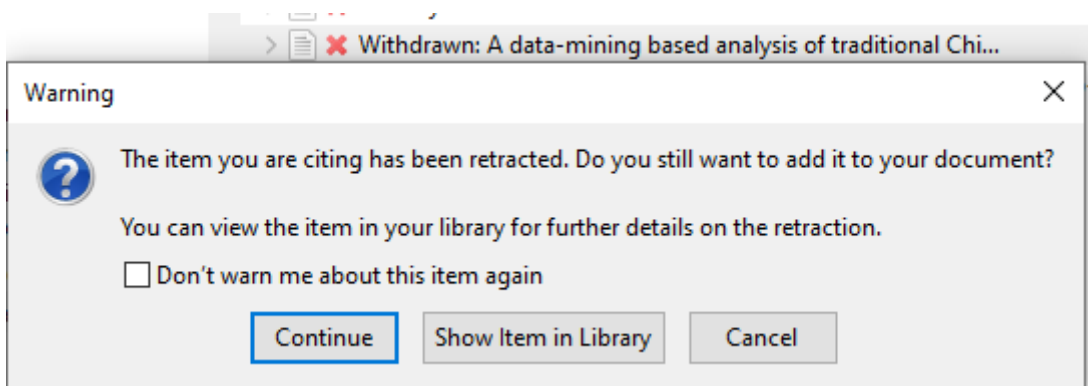
When the first retracted article is added, a separate directory called *Retracted Items is created* and further retracted articles will be added to this directory over time.