

# zotero

Dr. Daniel T. Rudolf

3 May 2017

# Source

- The information on the following slides are based on the documentation on the official Zotero website:

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

(Last accessed: 15. February 2017)

# Content

- What is Zotero?
  - Installation
- Collecting references in Zotero
- Finding references in Zotero
- Organising your library
- Further functionalities
- Zotero and office programmes
- Collaborative Work

[https://www.zotero.org/support/screencast\\_tutorials](https://www.zotero.org/support/screencast_tutorials)

# What is Zotero?

- Firefox browser extension
  - Runs in its own pane
  - Separately from web pages
- There is also a standalone version
  - An additional extension for one the following browsers can be installed: Firefox, Safari, Chrome

# Wha is Zotero?

- Reference management tool
  - Supports **collecting**, **organising**, **citing** and **sharing** your research references
- 300 MB online storage included for free
  - on your own Zotero account
  - but consider the *privacy* of your data!
- Collaboration with others in individually created groups

# Installation

- Standard: Zotero for Firefox (Extension)
- You are using another browser or do not want anything additional in your browser: Standalone version

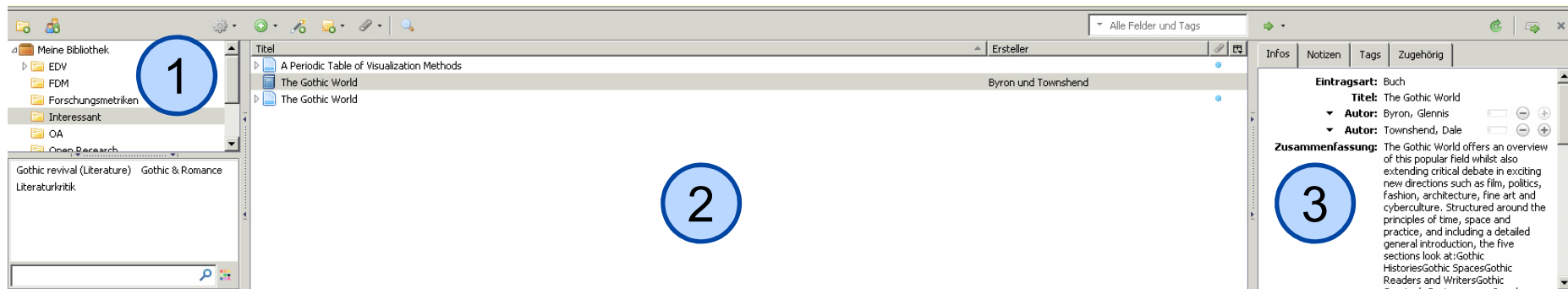
<https://www.zotero.org/download/>

- In case those options are not possible, there is a third: the Bookmarklet

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

- Windows, Mac, Linux, (BSD, UNIX)

# The Zotero Pane



- ① **My Library:** Organisation of your references in individually created folders (collections)
- ② **Title:** The references inside the selected collection
- ③ **Metadata:** Info, Notes, Tags and related items of the selected reference

# References

- Reference types: books, articles, web sites, works of art, laws, ...
  - Each has individual meta data fields
- Indexing and systematisation via your own notes and tags (= subject headings)



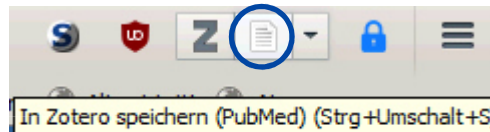
# Collecting References

- Mouse click or <Ctrl + Shift + S>
  - Z. Identifies the type of reference if one its integrated 'translators' recognizes the web site

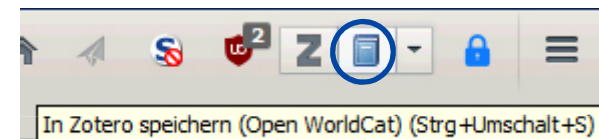
## Web site



## Journal article



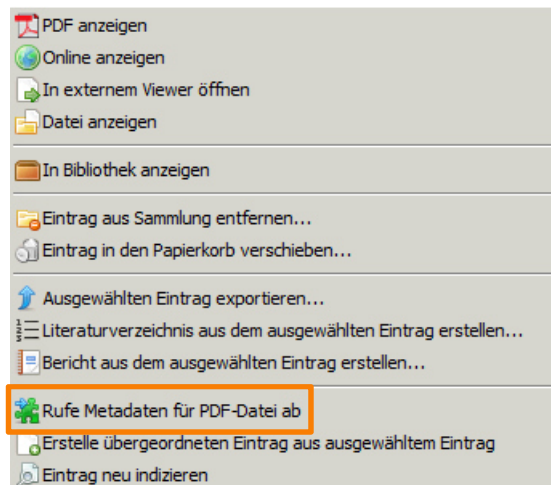
## Book



- Zotero creates automatically a snapshot of web sites (this can be changed under '**Preferences...**' in the actions menu  )

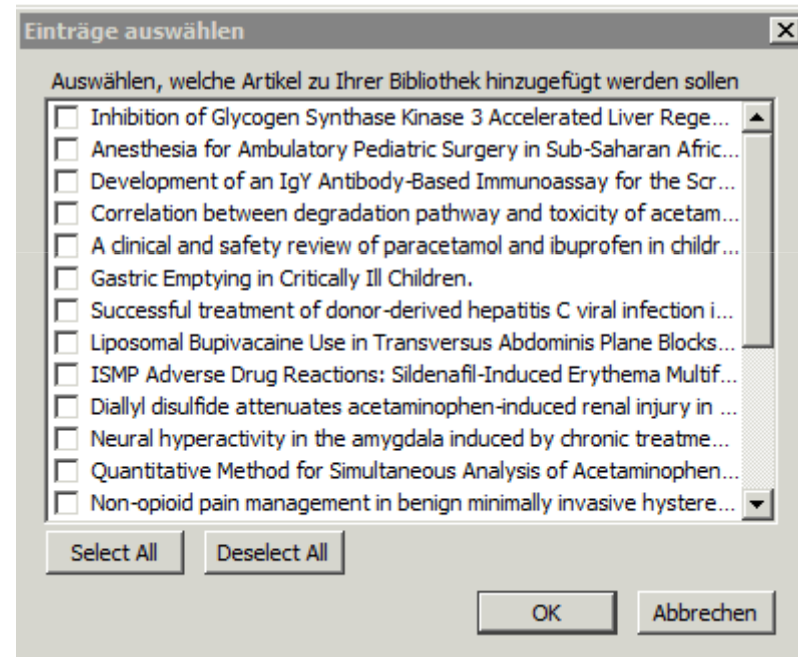
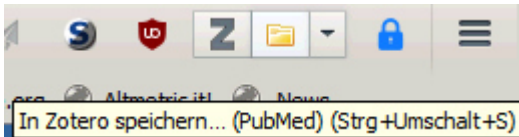
# Collecting References

- Imported PDFs have initially only their file name as title
- Two possibilities to get the metadata
  - manually
  - automatically (not always possible): right-click on title  
→ 'Retrieve Metadata for PDF'



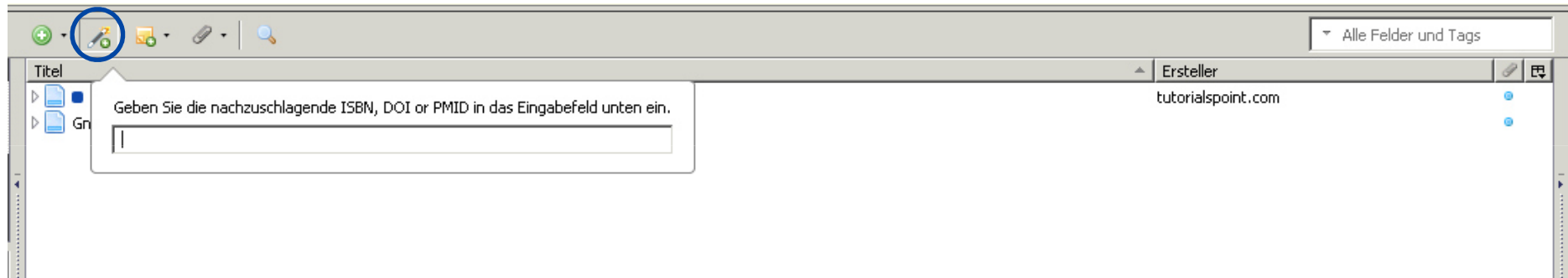
# Collecting References

- From lists (e.g. after a database search)




# Collecting References

- Via identifiers
  - ISBN, DOI (Digital Object Identifier), PMID (PubMed ID)

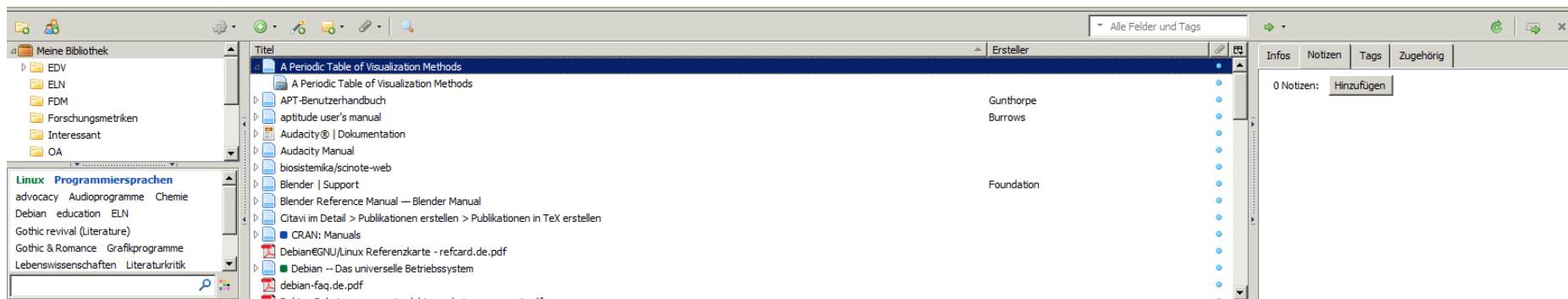


# Importing References


- Data from other reference manager software can be imported via ,**Import...**' in the actions menu 
- Supported formats:
  - Zotero RDF
  - MODS (Metadata Object Description Schema)
  - BibTeX
  - RIS (= **Endnote**)
  - Refer/BibIX
  - Unqualified Dublin Core RDF

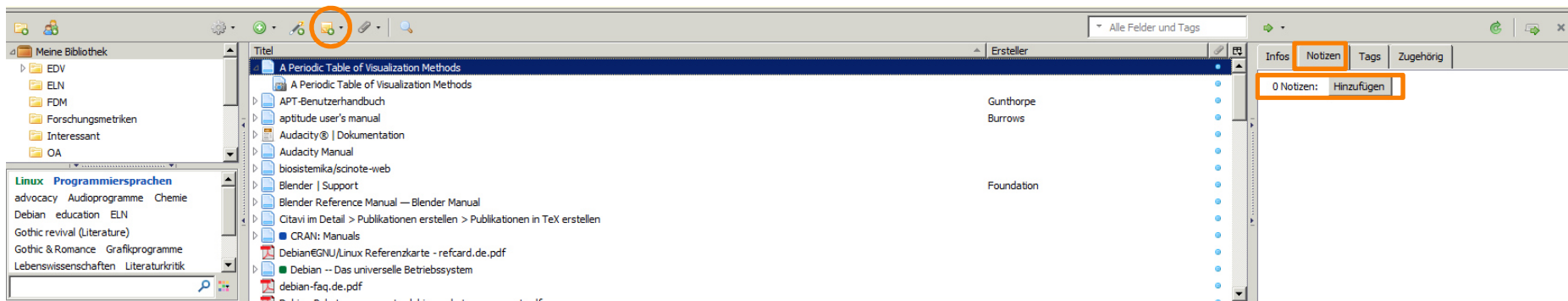
# Notes and Attachments

- Notes, files, and links can be added to items
  - They are listed under the respective item in the central column
  - They can be shown or hidden via the item's arrow symbol



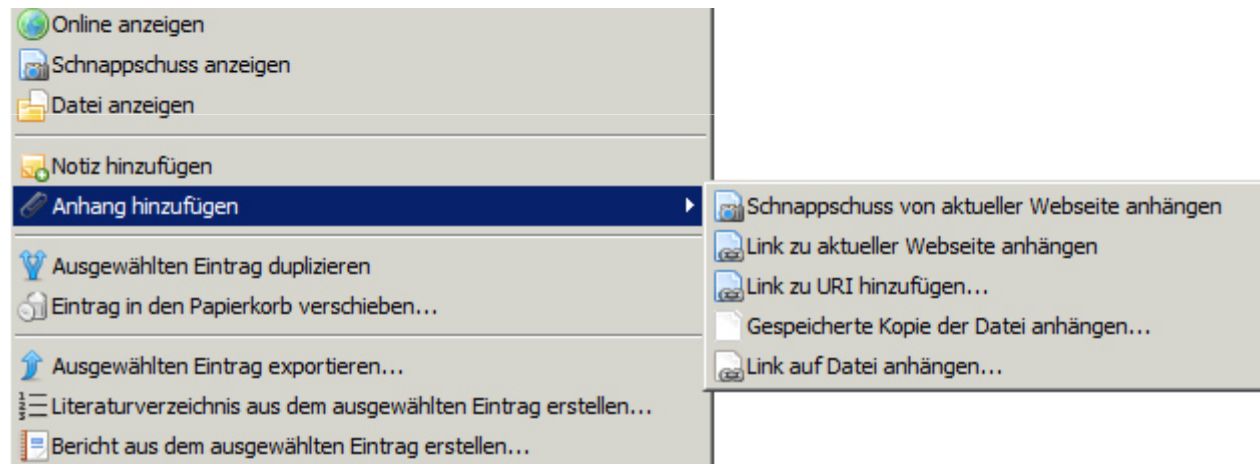
# Notes and Attachments

- How to add notes
  - To items: via the **Notes** tab in the right column
    - Can be edited directly there or in a separate window
  - Stand-alone: Via the icon  in Zotero's main menu



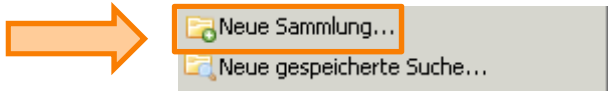
# Notes and Attachments

- How to attach files or links to files to an item
  - Drag & Drop
  - or right-click and **Add Attachment**





# Organising „My Library“

- **My Library** contains all collected items
  - Adding **new collections** (subfolders): via right-click menu 
  - Sorting items by subject to collections
    - Drag & Drop
    - Items in collections are links (aliases) not copies
  - **Subcollections** can be added to an existing **collection**


# Organising „My Library“

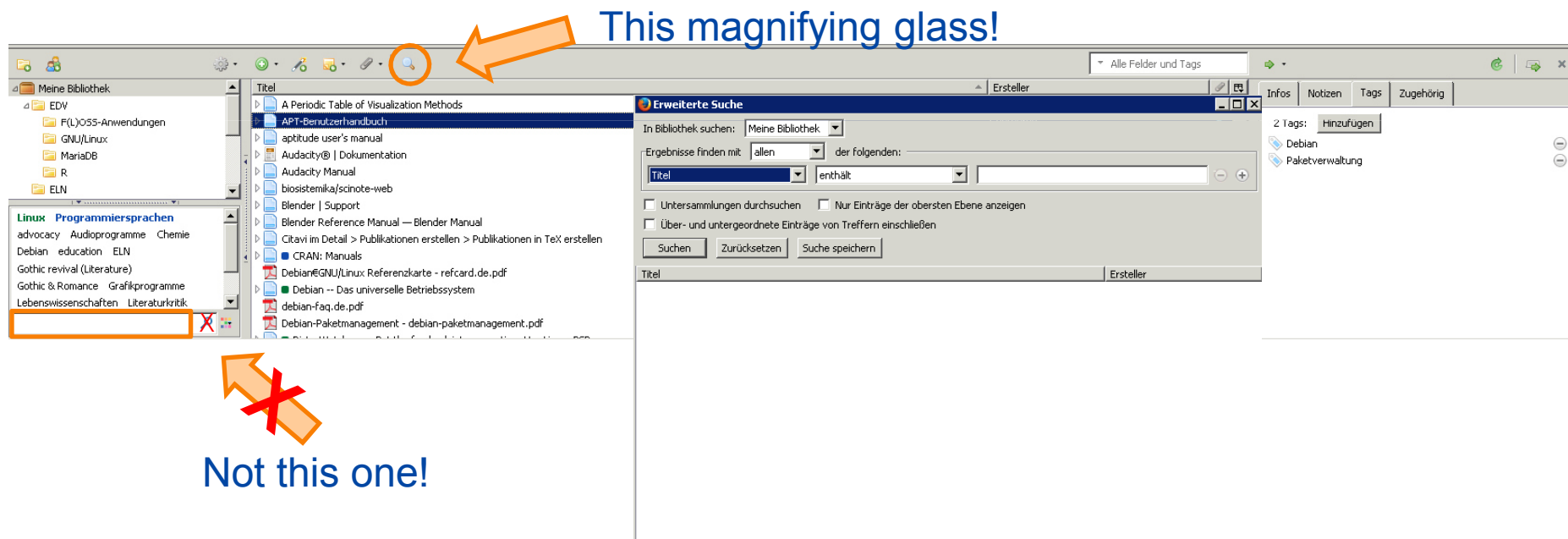
## ■ Tags

- Tags describe the content of items
  - They are manually created and assigned under the tab **Tags** in the right column
  - They can be edited in the left column inside the ‚Tag Cloud‘
    - Add a colour, rename, delete
- Clicking on a tag filters your items so that only items with the corresponding tag will be shown

# Organising „My Library“



## ■ Search

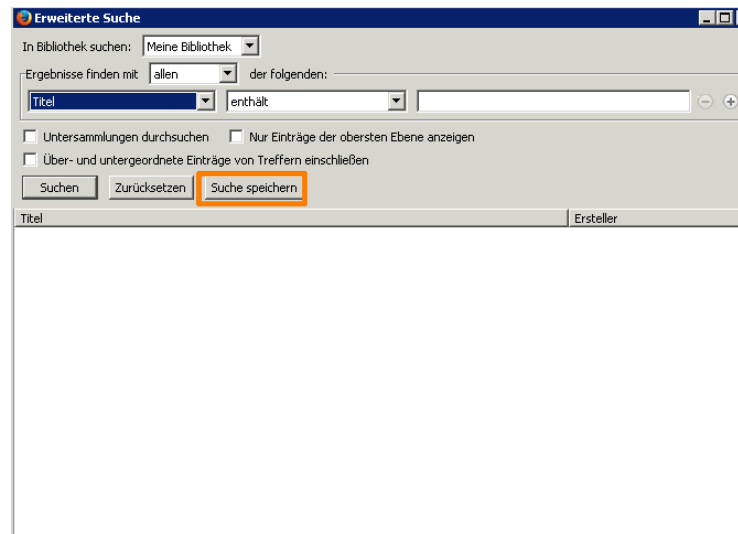
- Simple Searches are entered here
- For Advanced Searches press the magnifying glass 



# Organising „My Library“

## ■ Searching

- Advanced Searches can be saved 
  - in the left column like collections 
  - They actualise themselves dynamically
    - New items that fit the search parameters are automatically added



Erweiterte Suche

In Bibliothek suchen: Meine Bibliothek

Ergebnisse finden mit allen der folgenden:

Titel enthält

Untersammlungen durchsuchen  Nur Einträge der obersten Ebene anzeigen

Über- und untergeordnete Einträge von Treffern einschließen

Suchen Zurücksetzen Suche speichern

Titel Ersteller

# Organising „My Library“

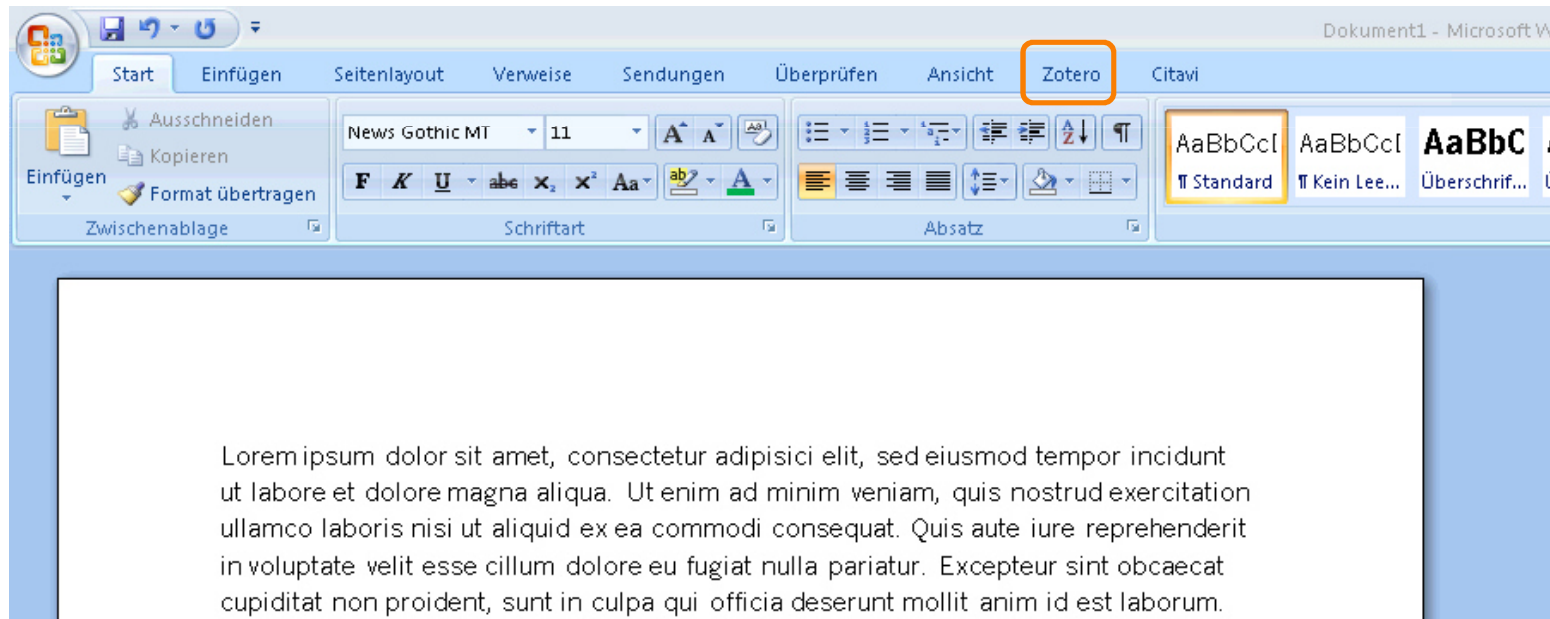
- ‘Relating’ one item to another
  - Related entries can be linked together via the tab **Related** in the right column
  - Afterwards you can jump from there to related items by one click

# Citing References

- Zotero uses the [Citation Style Language \(CSL\)](#) for bibliographically correct citations and reference lists
- There are at the time 8501 citation styles in the [Zotero Style Repository](#) (last checked: 15. February 2017)

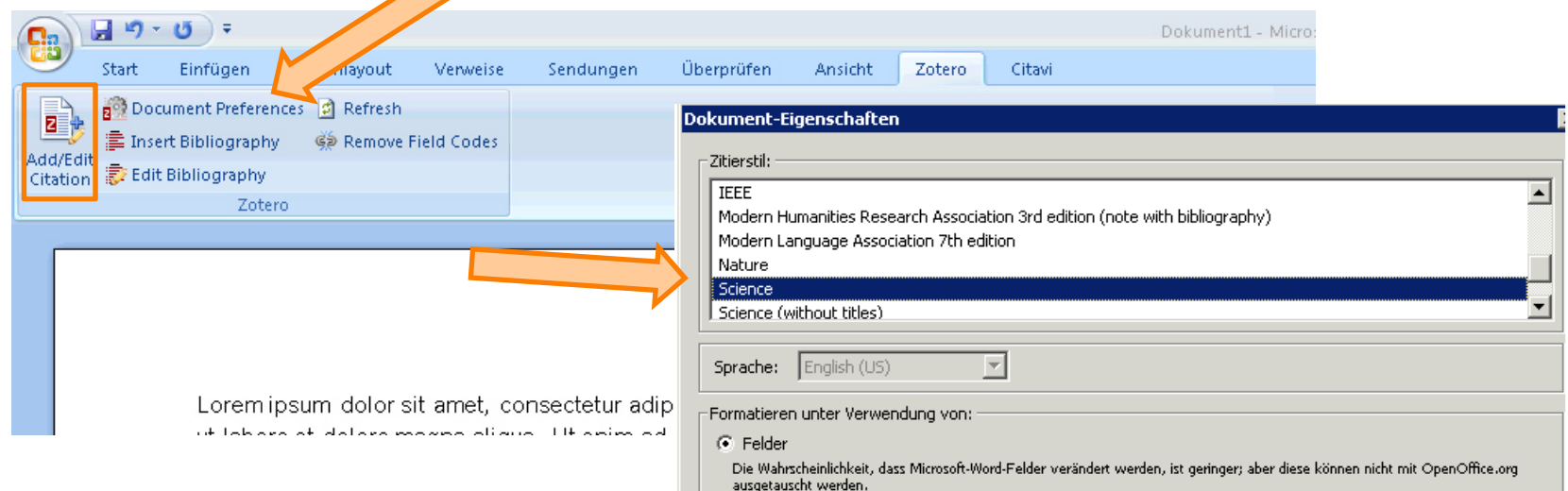
# Citing References

- Integration in common Office software
  - MS Word, LibreOffice
  - Via a Firefox-Extension (Plugin)



# Citing References

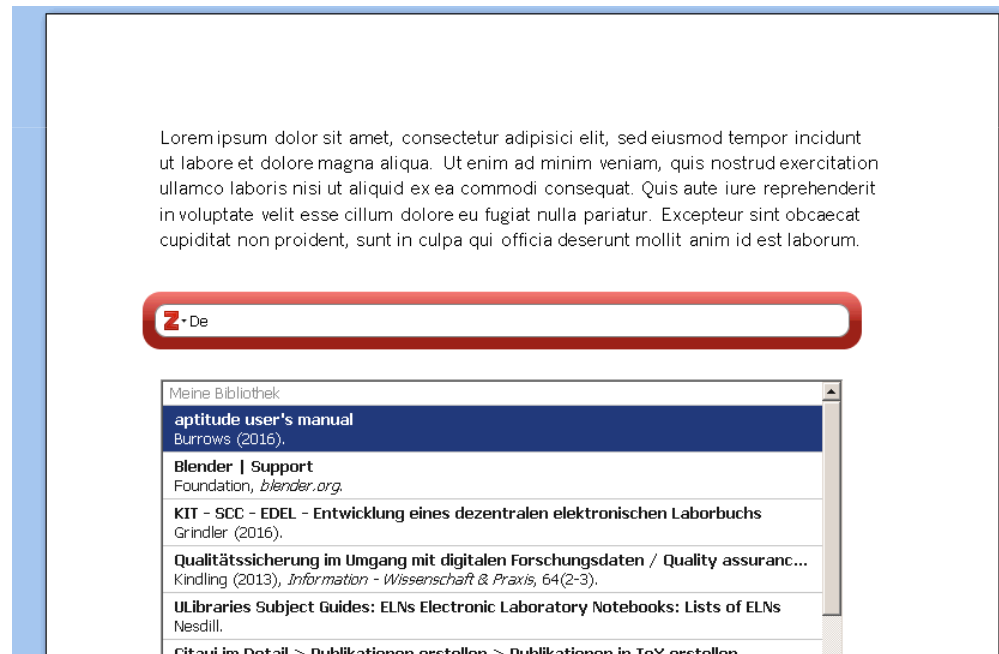
- Set the cursor on the appropriate text position
- In the Zotero Tab: **Add/Edit Citation**
  - The first time you have to choose your desired **Citation Style**
  - You can still change it later in **Document Preferences**





# Citing References

- Afterwards you'll get a movable search field by clicking **Add/Edit Citation**
- Enter title, author, keyword, or similar herein and choose the reference from the list



# Citing References

Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed eiusmod tempor incididunt ut labore et dolore magna aliqua. {Citation} Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquid ex ea commodo consequat. Quis aute iure reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint obcaecat cupiditat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.



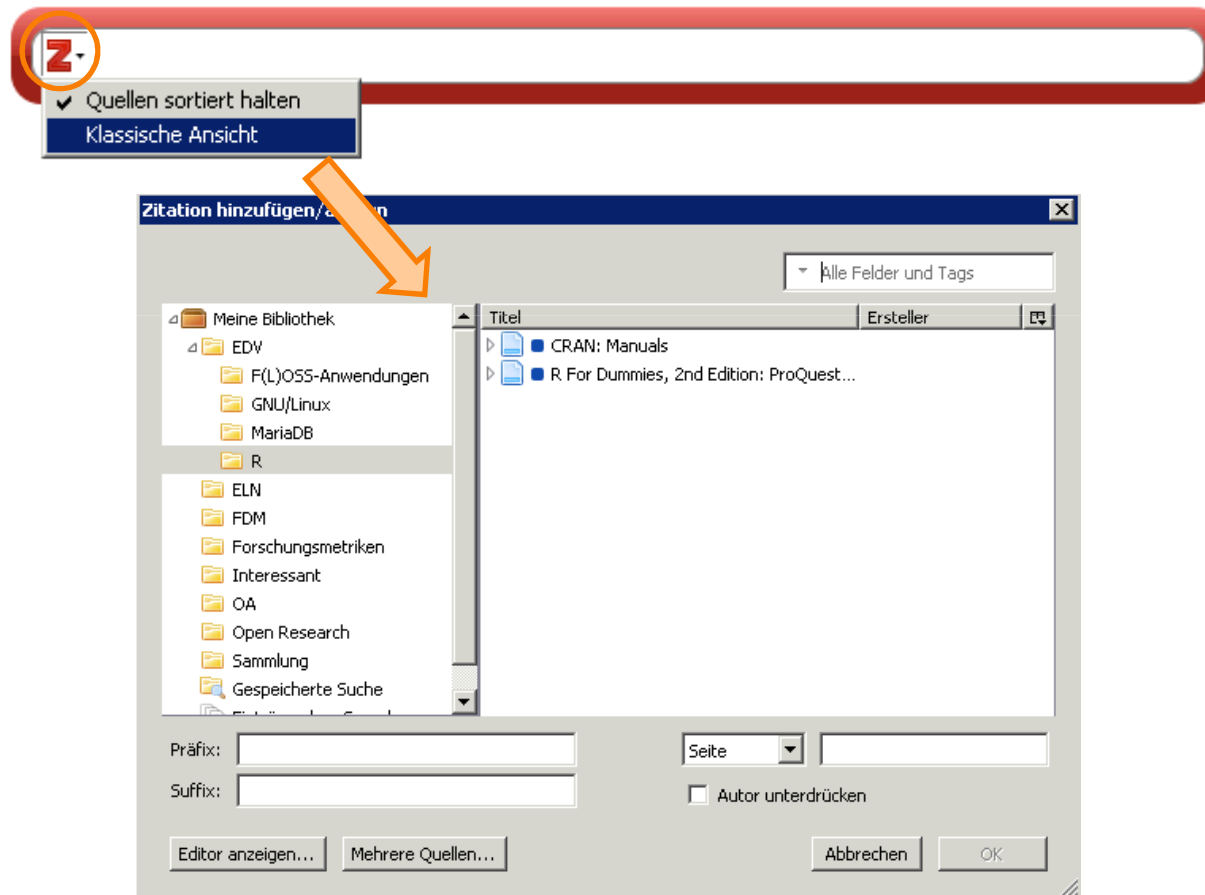
**Z** "Debian -- Das universelle Betriebssystem"

- You can also choose several references consecutively
- Press Enter and the references are inserted at the specified spot

Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed eiusmod tempor incididunt ut labore et dolore magna aliqua. (1) Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquid ex ea commodo consequat. Quis aute iure reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint obcaecat cupiditat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

# Citing References

- Search field alternative: ‚Classic View‘



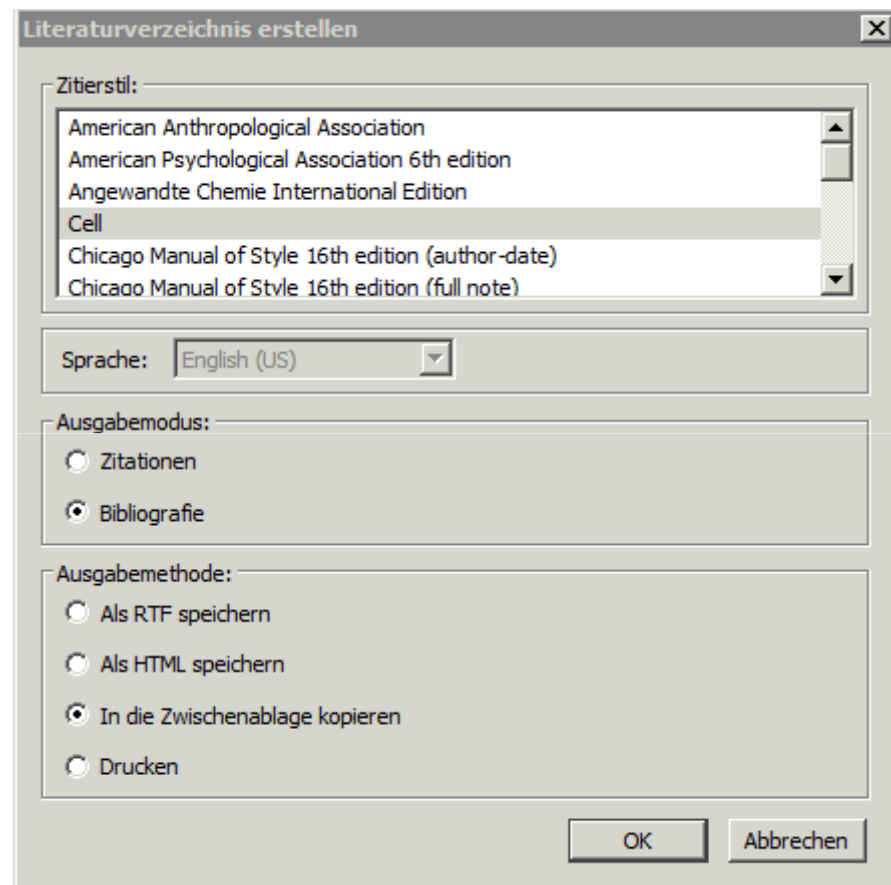
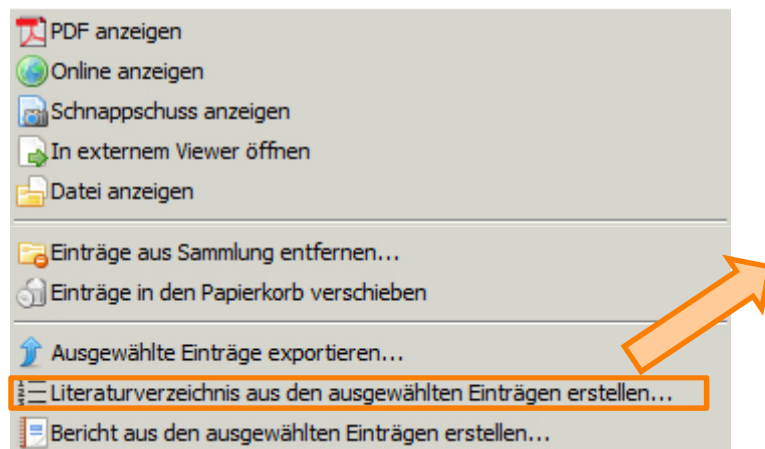
# Citing References

- How to insert a reference list automatically
  - Put the cursor where you want the reference list to be (use a new paragraph!)
  - Click **Insert Bibliography**
    - Subsequent changes of the citation style in the **Document Preferences** are automatically adopted
    - You can edit citations manually in **Edit Bibliography**, but be aware that **manually edited citations are no longer actualised automatically!**

# Citing References

- You can insert citations and reference lists in any text fields or programmes
  - Drag & Drop
  - Or select the item and right-click (see next slide)
    - Context menu: **Create Bibliography from item...**
    - Choose **citation style**, **Output Mode**, and **Output method**
      - **Copy to Clipboard**: Insert via Paste/ Insert/ <Ctrl>+<P>
      - **Save as RTF or HTML**
      - **Print**


# Citing References



# Collaborative Working

- Synchronising
- Zotero servers
- Groups

# Collaborative Working

- Create **groups** on the Zotero web page
  - Can be directly accessed through the Zotero menu bar via the **New Groups** symbol to the right of the **New Collections** symbol 
- Functionalities of **Groups**
  - Collaboration in teams
  - Web based reference lists
    - Teaching (lectures, seminars)
    - Presenting own work
    - ...



# Collaborative Working

- Group types
  - Private Membership
  - Public, Closed Membership
  - Public, Open Membership

Quelle: <https://www.zotero.org/support/de/groups>

# Collaborative Working

- Private Membership
  - Only group members share their work, publically not visible
  - Group page only visible for members or on invitation
  - Groups do not show on public profiles and cannot be retrieved through group search or search engines
  - Admins can define if group members are allowed to not only share references but also files

# Collaborative Working

- Public, Closed Membership
  - Members are assigned by the administrator, references can be viewed by everyone
  - Group is visible to the public, participation only with an admin's approval or invitation
  - Admins can create libraries for the group and decide if these libraries or collections included in them are visible to the public or to members only
  - Admins can define if group members are allowed to not only share references but also files


# Collaborative Working

- Public, Open Membership
  - For an open and comprehensive exchange
  - Group page is public and anyone may participate
  - Admins can create libraries for the group and decide if these libraries or the collections included in them are visible to the public or to members only
  - Not possible to share files


# Collaborative Working

- Library settings
  - **Library Reading** – Who is allowed to see the library?
    - Anyone on the internet *or* only group members?
  - **Library Editing** – Who is allowed to edit (amend, change, delete) items?
    - Any group members *or* only admins?
  - **File Editing** – Who is allowed to edit (amend, change, delete) attachments?
    - Any group members *or* only admins *or* is saving files not allowed at all?

# Securing your Data - Backups

-  Preferences... > Advanced > Files and Folders: Show Data Directory opens Zotero's directory on your computer
- The file `zotero.sqlite` is the most important
- It contains the majority of data (metadata, notes, tags, etc.)
- The folder `storage` contains all imported files (PDFs, snap shots, audio files, etc.)

# More Stuff

- Timeline (  Create Timeline)
- Synchronisation with a Zotero online account (300 MB free of charge)
- Extract metadata from PDFs
- Creating several libraries: Firefox profiles!  
<<<https://support.mozilla.org/en-US/kb/profile-manager-create-and-remove-firefox-profiles>>>