

# Zotero reference manager

## Features:

- Collecting and managing bibliographic data
- Storage in a multi-level folder system
- Full text, bibliographic records, and notes all in one place
- Automated citation and bibliography generation
- Collaboration support

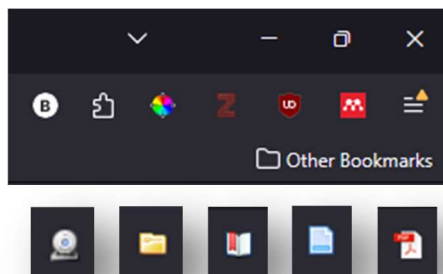
## Installation

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

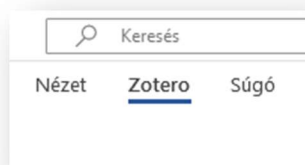
Link to browser: <https://www.zotero.org/download/connectors>



**Application icon on your  
desktop**



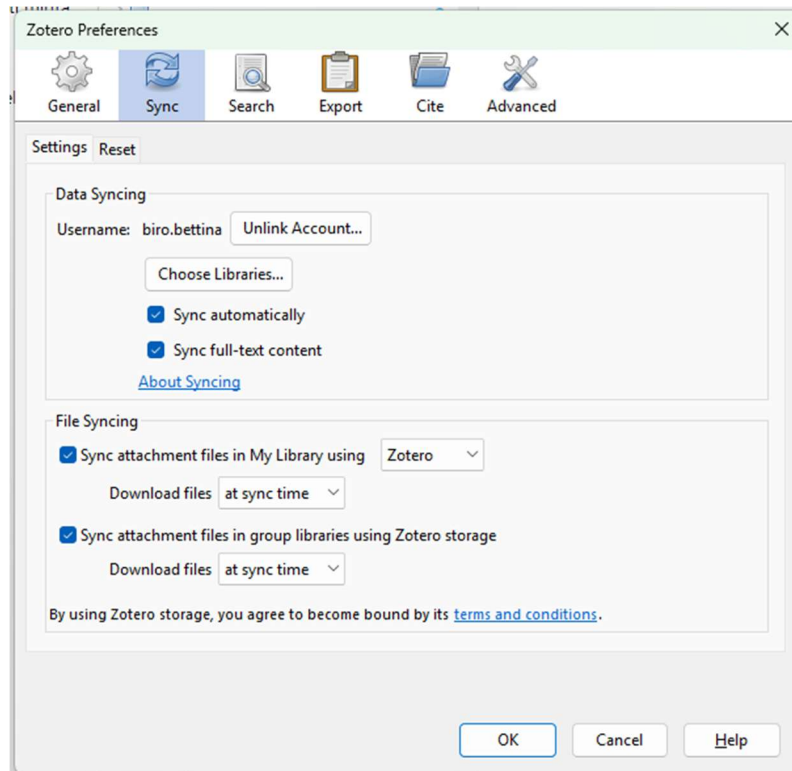
**In the browser the icon  
changes based on the type of  
file detected**



**In the Word editor you get a  
new menu item**

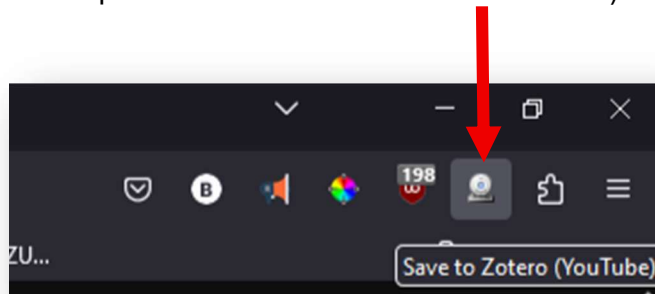
# Usage

## Login (Edit > Preferences > Sync tab)

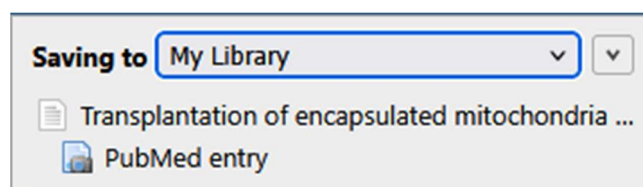


## Saving bibliographic data and files from browser

1. Open the Zotero desktop application, log in to your browser connector, and leave the page open.
2. Find the webpage of the document you want to save. (This could be a YouTube video, a PubMed database article, a blog post or anything else.)
3. Look for the "Save to Zotero" browser extension button in the top right of your browser and save the record. (The image shows an example of this button in a browser toolbar).

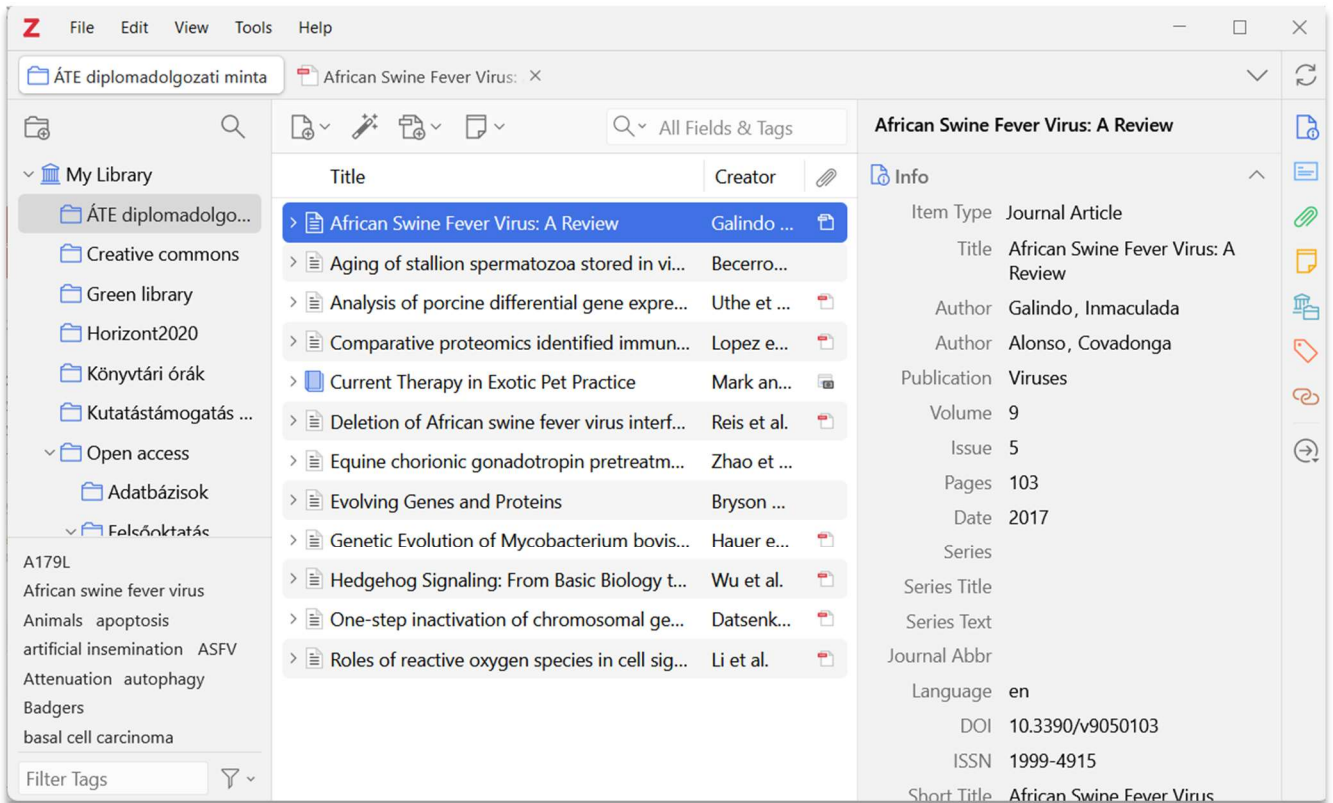


4. During the saving process, you can also specify which pre-created collection you want to save the item to.



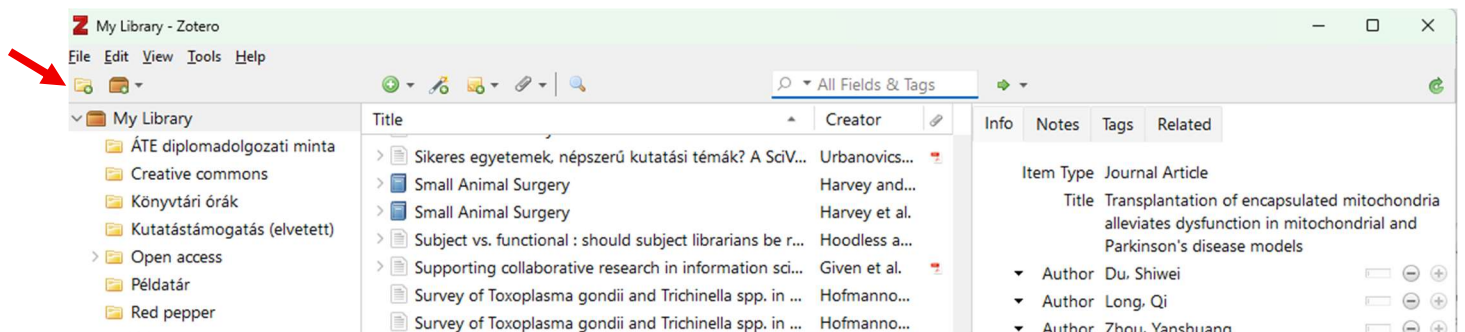
## Editing data fields

The data of the selected publication is displayed in the right bar. The data is displayed in separate editable data fields. When saving, you should check the data for correctness (compare it with the data displayed in the publ. record) and correct it manually.

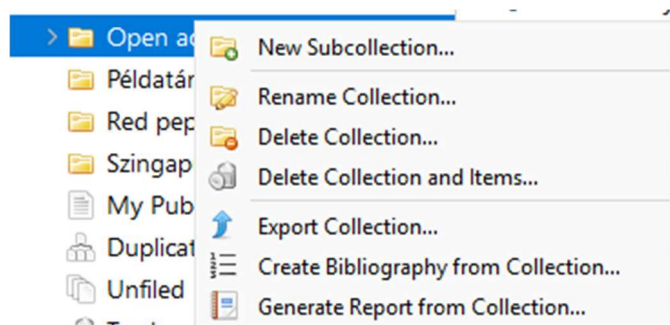


## Organizing into folders (i.e. creating a collection)

We can create a new library and collection using the icons below.



A subcollection can be created by right-clicking on an existing collection.

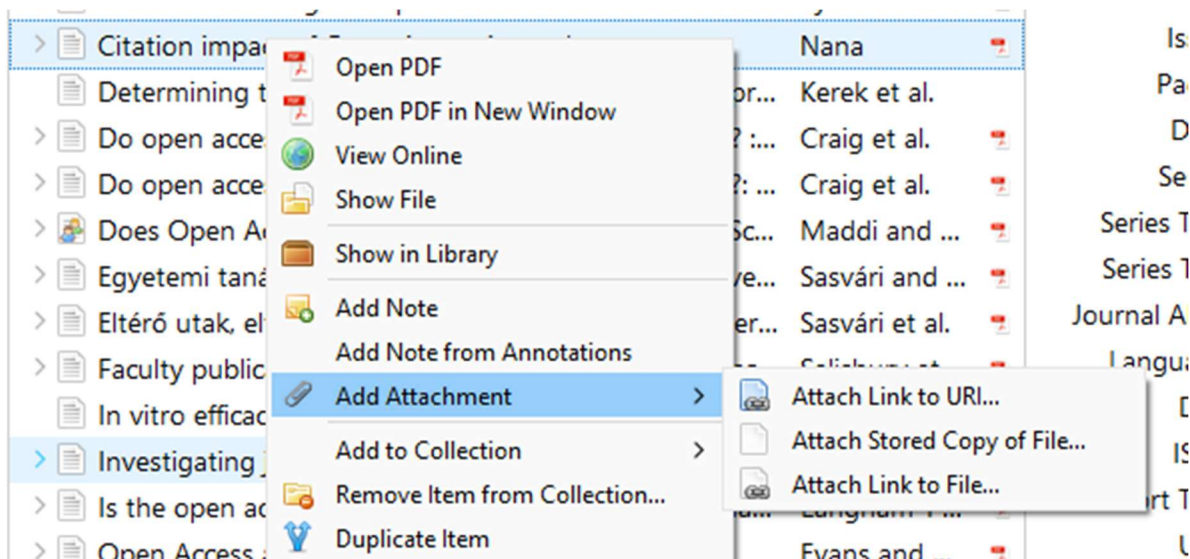


The collections found here work similarly to folders and files on a computer. Records can simply be dragged from one to another, and they can also be stored in multiple folders at the same time.

**Tip:** When writing a paper, it is worth using subcollections as well—you can group together works related to a specific topic or chapter that are waiting to be used.

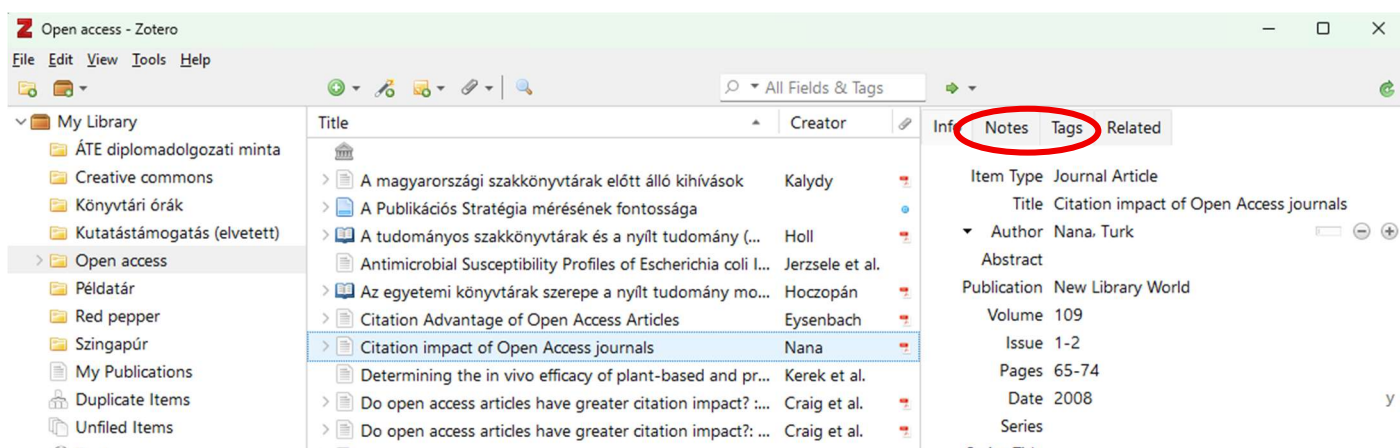
### Attached webpage, link, full text

Where possible, Zotero automatically attaches the full text by default. Where it does not, this can also be done manually afterward:

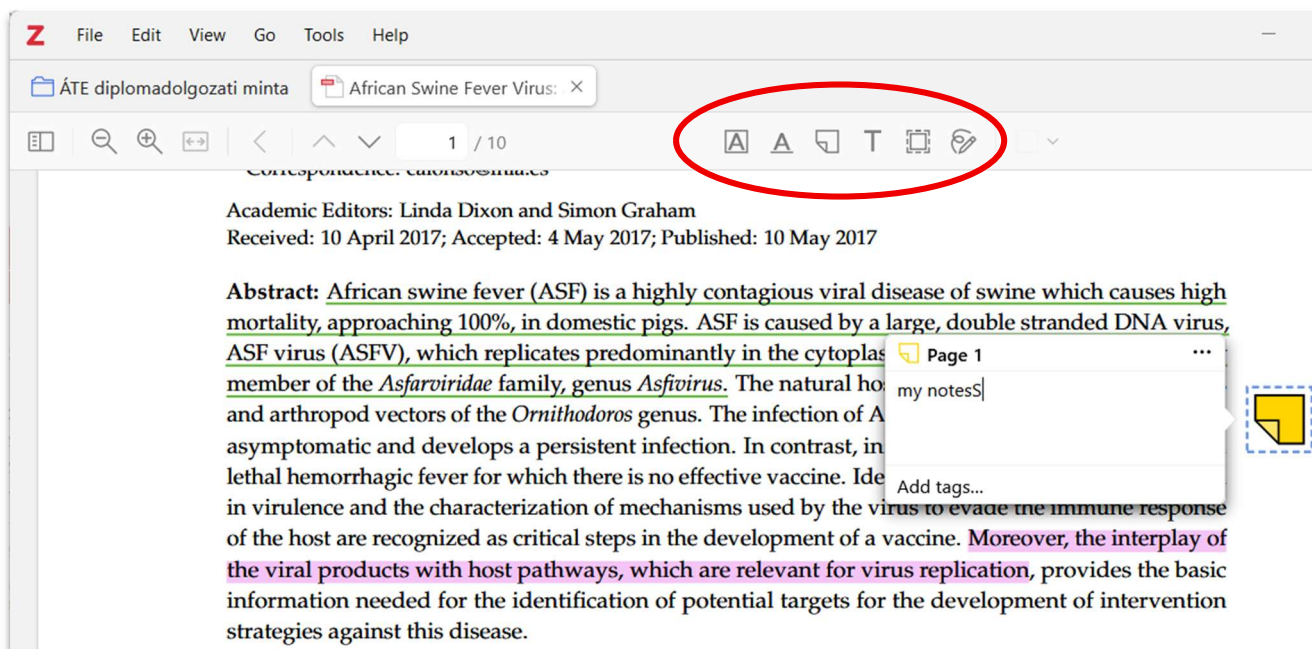


### Notes and tagging

In the notes attached to records, you can record your own thoughts, while tags support easier retrieval later.

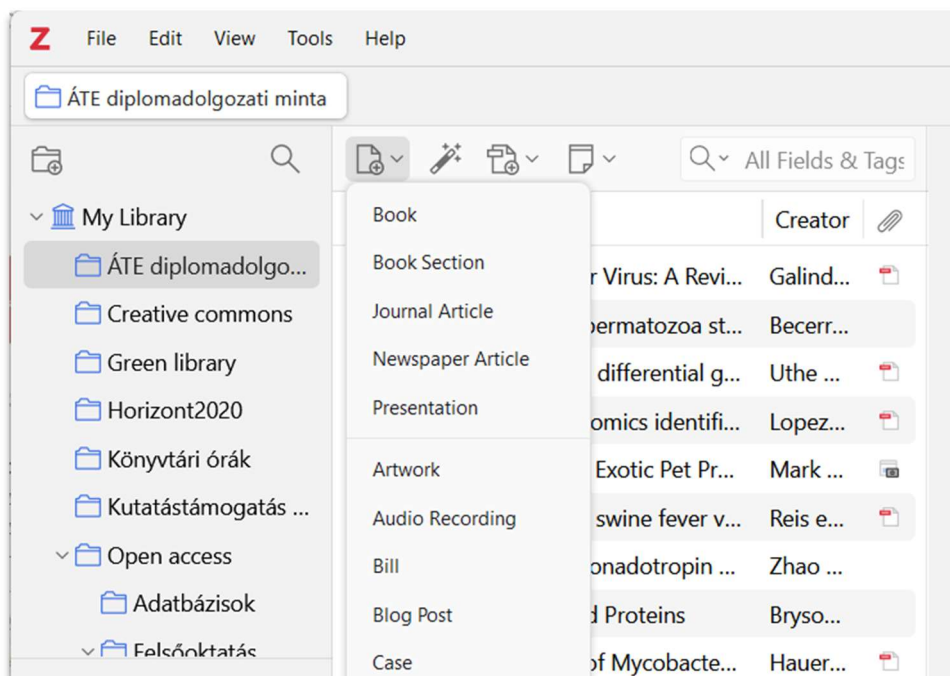


## Highlight text, make notes in the pdf file



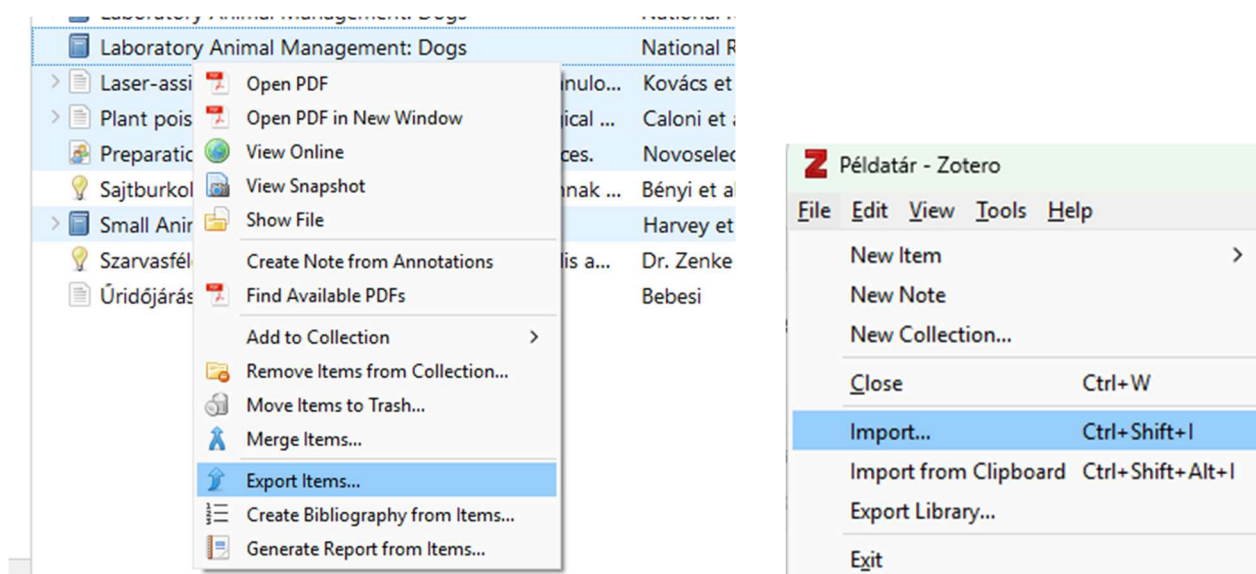
## Upload manually

You can manually upload the data of the literature used in the printed version or that cannot be downloaded from a website. Clicking the + sign displays the most commonly used document types. Clicking on one of them opens a blank record for you to fill out.



## Export, import

One way to share a collection or import many items.

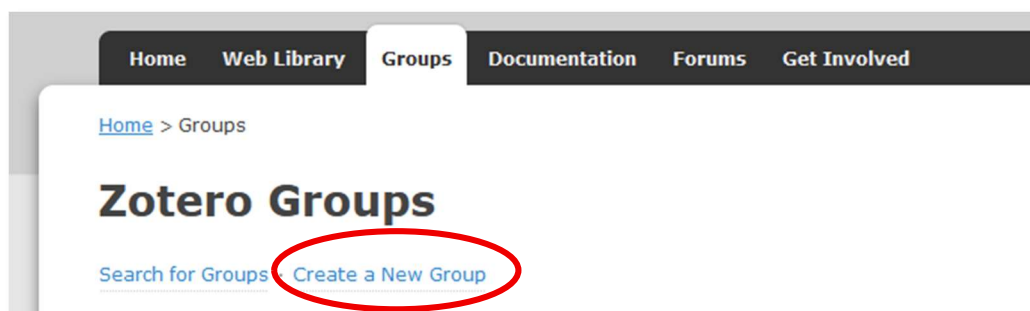
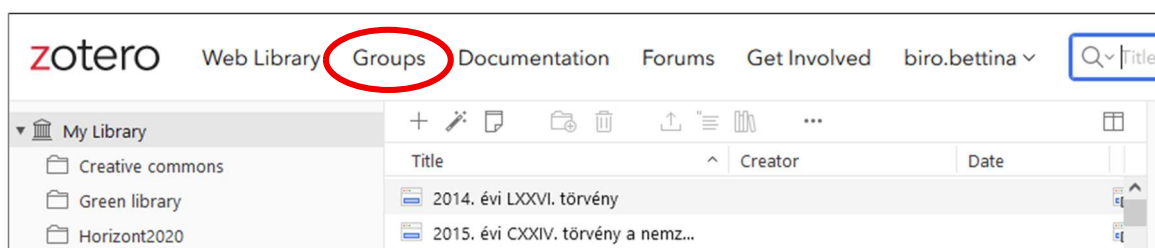


## Collaboration

On Zotero's web interface, the "Groups" collaboration editing platform is also available. Different levels of visibility and access can be set. Using these, we can create, for example:

- a student bibliography, or
- a co-author collaboration group.

### Creating a group



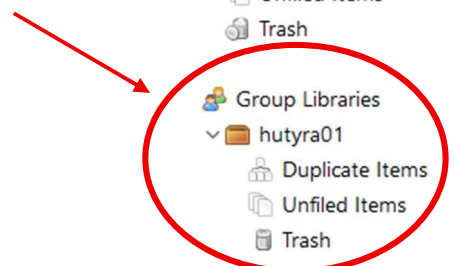
## Inviting people to the group

The screenshot shows the 'Members Settings' page for the group 'hutyra01'. The navigation bar includes 'Home', 'Web Library', 'Groups', 'Documentation', 'Forums', and 'Get Involved'. The breadcrumb trail is 'Home > Groups > hutyra01 > Settings'. The main heading is 'hutyra01: Members Settings'. Below it are links for 'Group Settings', 'Members Settings' (circled in red), and 'Library Settings'. Under 'Current Members', there is a table with columns 'Username', 'Full Name', 'Member Since', and 'Role'. One member is listed: 'biro.bettina' with full name 'biro.bettina' and member since '2022-11-05 15:13:10', with the role 'Owner'. Below the table is a red 'Update Roles' button. The 'Member Invitations' section shows 'No pending invitations.' and a blue link 'Send More Invitations' (circled in red).

## Editing and accessing collections within the group

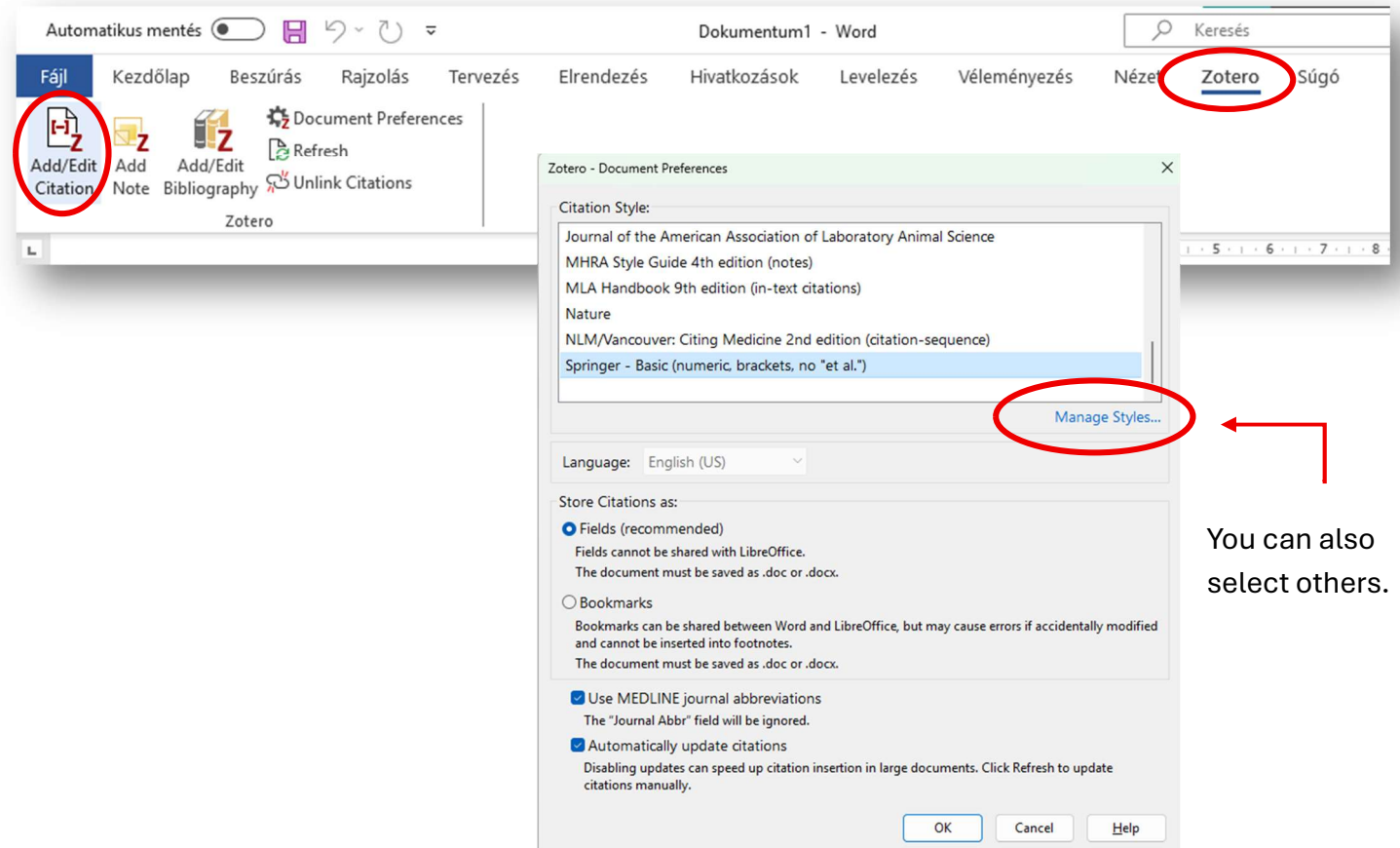
The screenshot shows the 'Group Library' page for the group 'hutyra01' in the browser. The navigation bar is the same as in the previous screenshot. The breadcrumb trail is 'Home > Groups'. The main heading is 'Zotero Groups'. Below it are links for 'Search for Groups' and 'Create a New Group'. The group name 'hutyra01' is displayed in blue, with 'Group Library' (circled in red) below it. Links for 'Manage Profile', 'Manage Members', and 'Manage Library' are also present. A table shows group details: 'Members' (1), 'Group Type' (Public, Closed Membership), and 'Group Library' (Anyone can view, only members can edit). To the right, the Zotero desktop application interface is shown. The 'Open access' collection is selected in the 'My Library' pane. In the 'Group Libraries' pane, the 'hutyra01' group library is expanded, showing sub-collections: 'Duplicate Items', 'Unfiled Items', and 'Trash' (circled in red).

After creating the group in the browser, the corresponding collection will also appear in the desktop application.



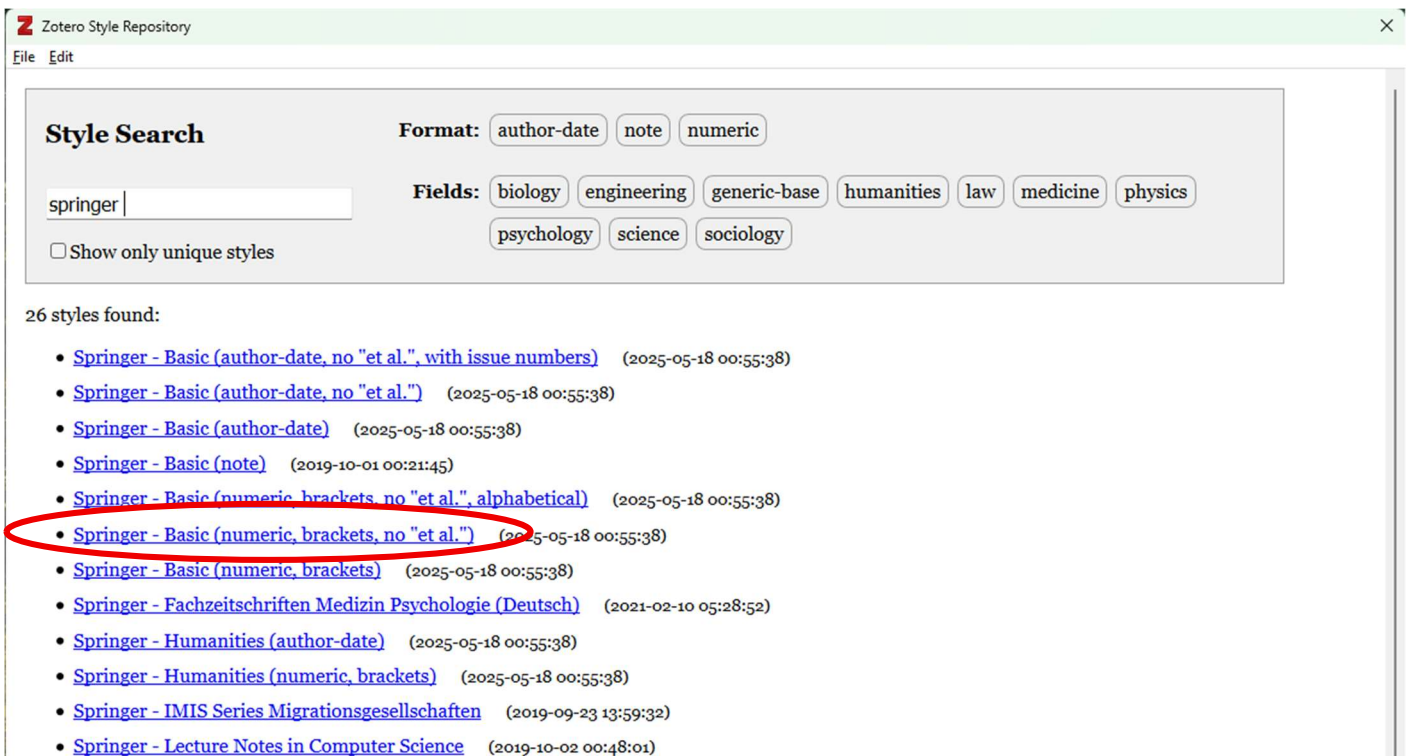
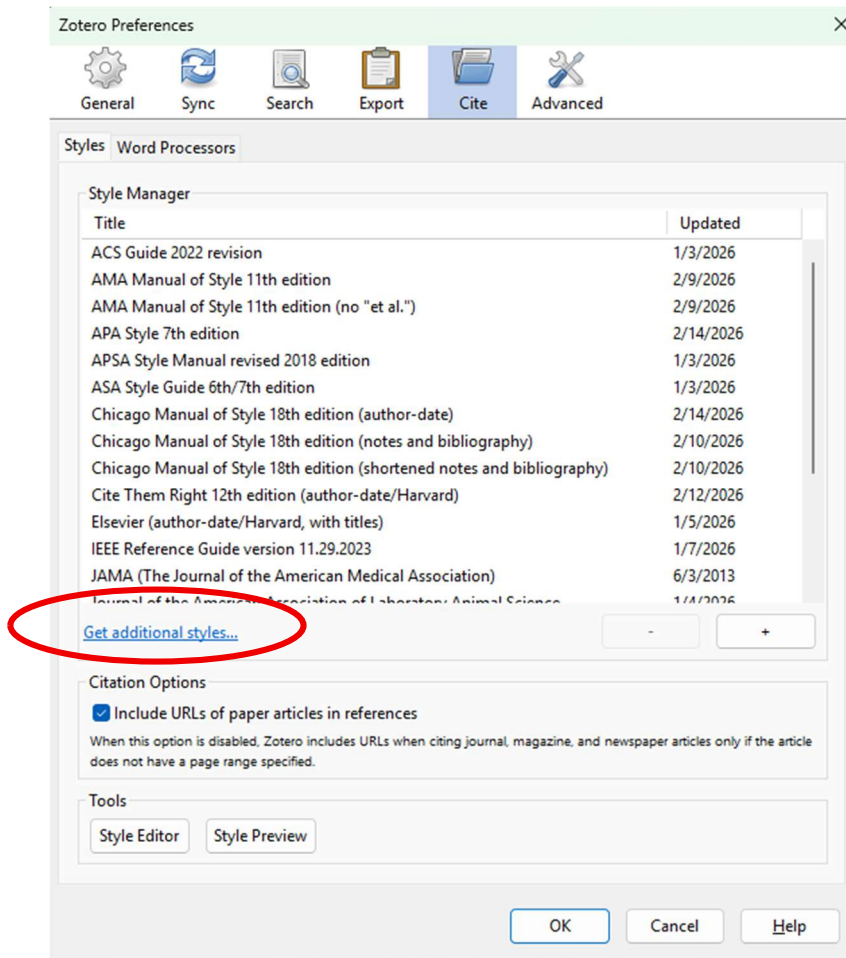
# Using it in the Word text editor

## Add an in-text citation

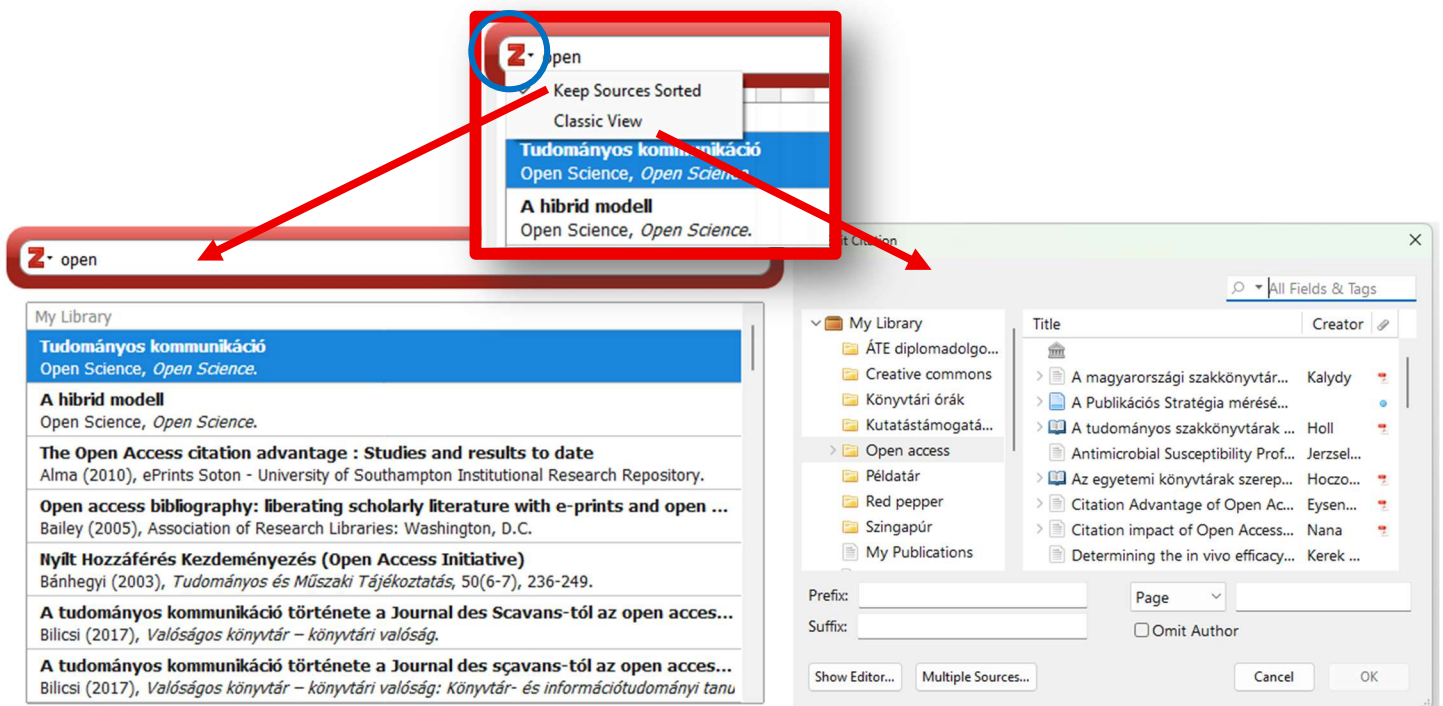


- After installing the style, if we click the “Add/Edit Citation” button again, we can select the installed citation style.
- By clicking the same button again, we can insert the in-text citation at the position of the blinking cursor in the document.
- We can choose between two dialog box options for adding citations. After selecting the publication, the citation is automatically inserted in the appropriate format.

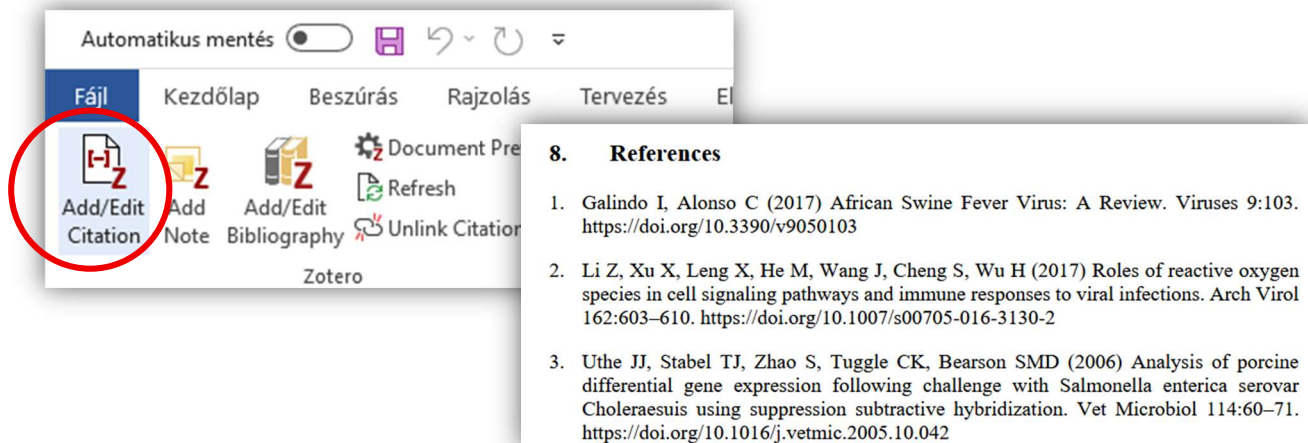
## Add an in-text citation



If you click on the Add/Edit Citation button again after installation, you will be able to select the installed citation style. By clicking on the same button again, we can create the in-text citation where our blinking cursor is in the text. You can choose between two display formats:



## Bibliography – One click away



## Sometimes Zotero makes minor errors. What can we do?

Using the *Unlink Citations* function, we can remove the live connection between Zotero and Word. The citations are converted into plain text, allowing us to make manual changes to the bibliography without Zotero overwriting them.

**Warning! This action is irreversible!** After unlinking, the document loses its connection to the Zotero database. Be sure to create a copy of the document beforehand in case you need to return to editing later.

## Video - Using reference managers in the Web of Science database

<https://www.youtube.com/watch?v=IkwsI8LXKTO>