UNIVERSITÀ
DEGLI STUDI
DI PADOVA

ZOTERO:

A free software to manage and create bibliographies

BIBLIOTECHE
DI INGEGNERIA

SBA SISTEMA BIBLIOTECARIO
DI ATENEO

What are we talking about today

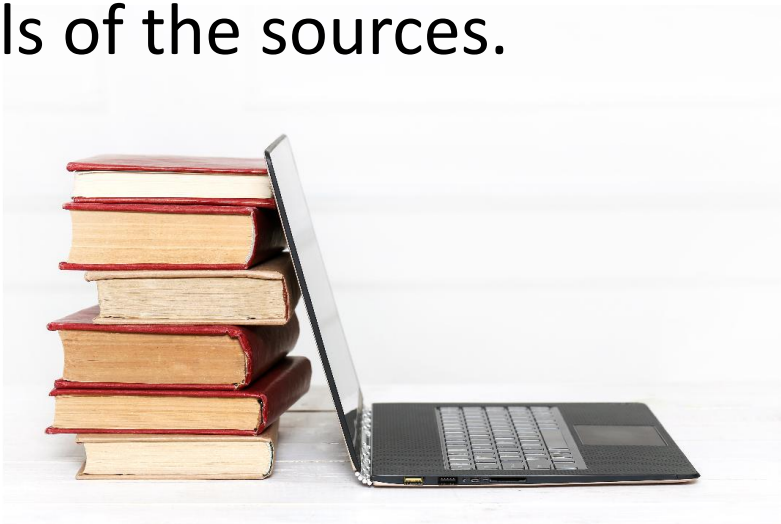
1. What is Zotero?
2. Download and create your own account
3. Collecting references
4. Attachments and notes
5. Getting your library organized
6. Bibliography

What is a bibliography?

- It is an **organized list of documents, books, articles, essays and web pages you use** to prepare a research project (thesis or article for a scientific journal)

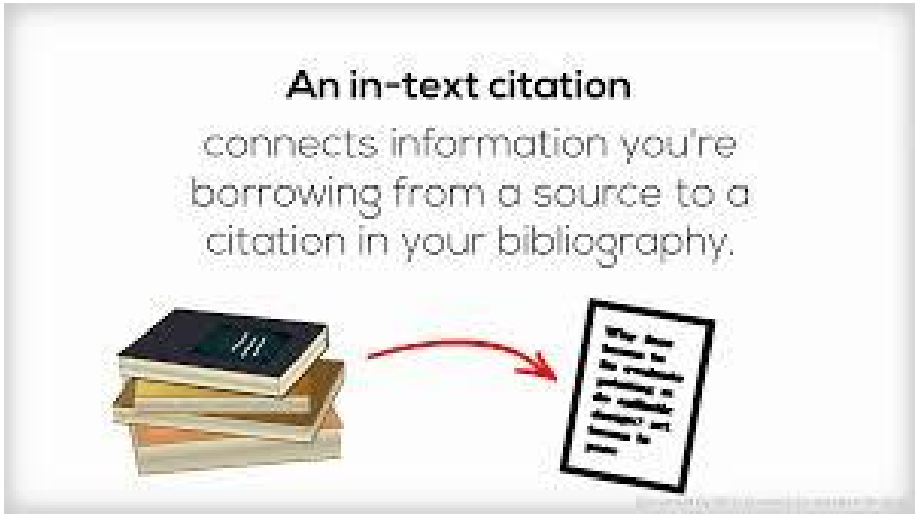
- it gives full publication details of the sources.

- and adds **scientific value** to a thesis, as it reflects the research process undertaken.



What is a citation?

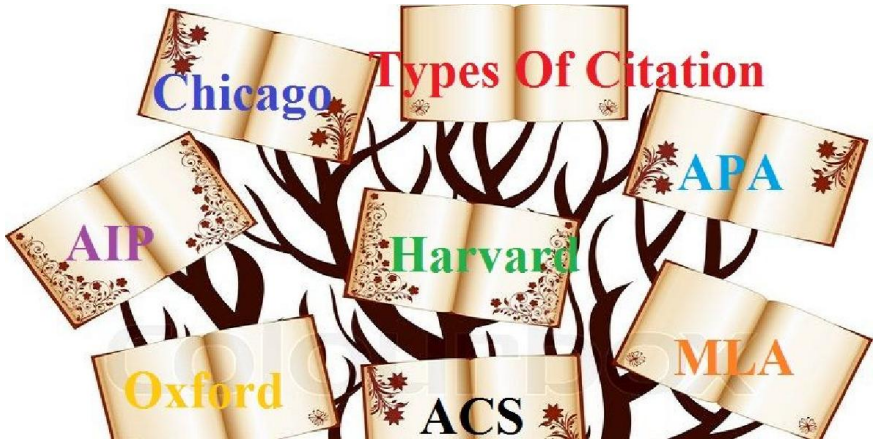
- **In-text citation:** is the brief form of the reference that you include in the body of your work.



Citation style

A citation style is the way to structure bibliographic citations.
When drawing up a bibliography, the author/s has to decide on a citation style, **which may be recommended by the tutor or the publisher**.

Although no single standard applies to all publications, the selected style needs **to be consistent throughout the document.**



Why use reference management software?

These applications can help you:

- **import citations** from catalogues, databases and websites
- **create and organize bibliographies** for theses, books and articles
- **insert and format citations** within the text of documents

Reference management

There are many management bibliography software (free or for a fee), for example:

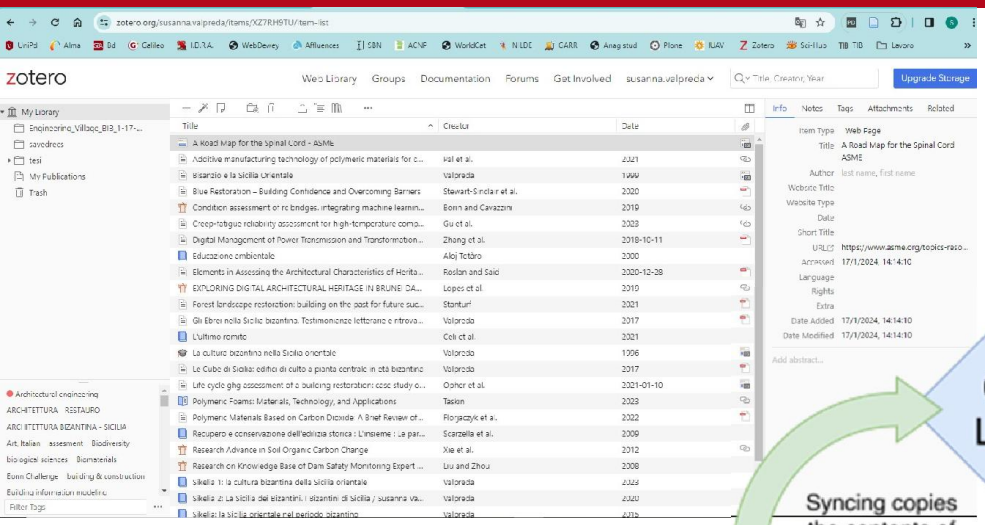
- Zotero (free up to 300 MB)
- Mendeley (free up to 2 GB)
- EndNote

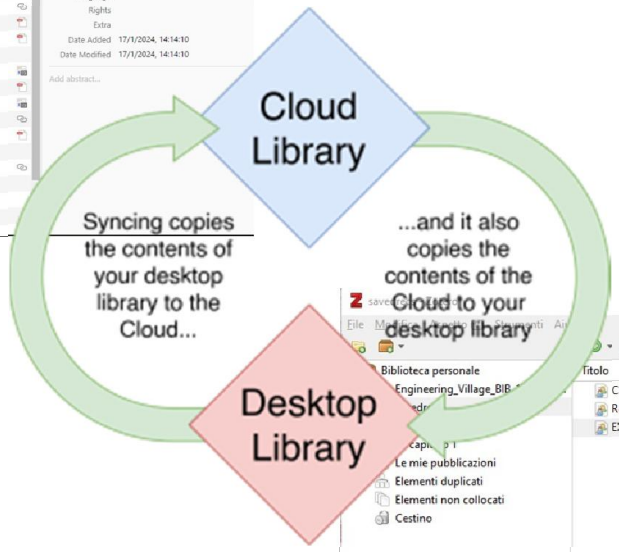
zotero

It is a free bibliography management program that allows you to:

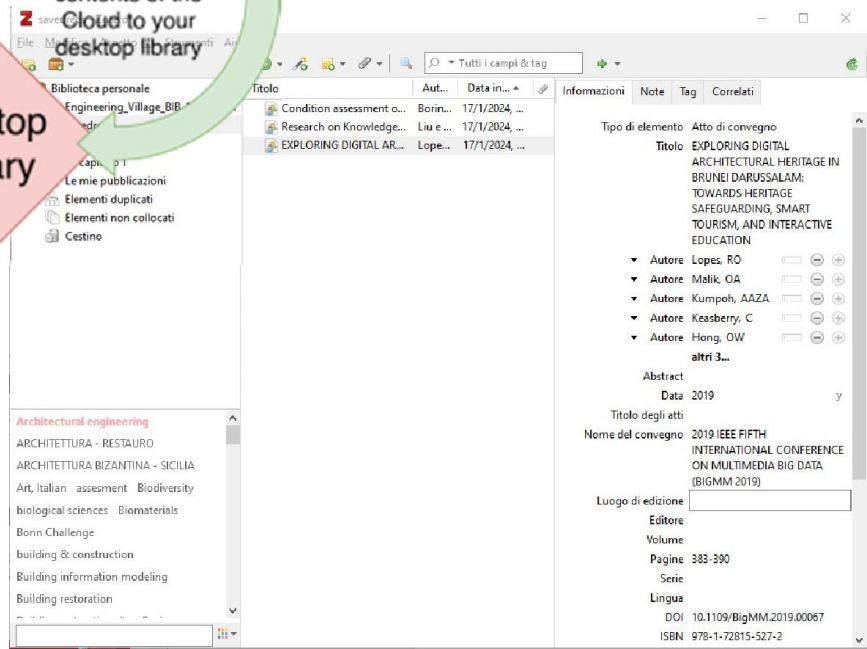
- create and organise your own bibliographic database, possibly attaching pdfs
- import bibliographic citations from catalogues, databases, electronic journals, websites
- insert bibliographic citations in text files according to a predefined style
- automatically create the final bibliography

←Web version





Desktop version →



zotero

Zotero (mainly the web version) can also be used in a 'social' manner to share citations and access groups.
Zotero is also particularly effective as a PDF document management tool, for extracting metadata and as a PDF reader.

Please note: It allows free storage of attachments up to 300 MB, but with a subscription it is possible to increase the storage capacity.

https://www.zotero.org/

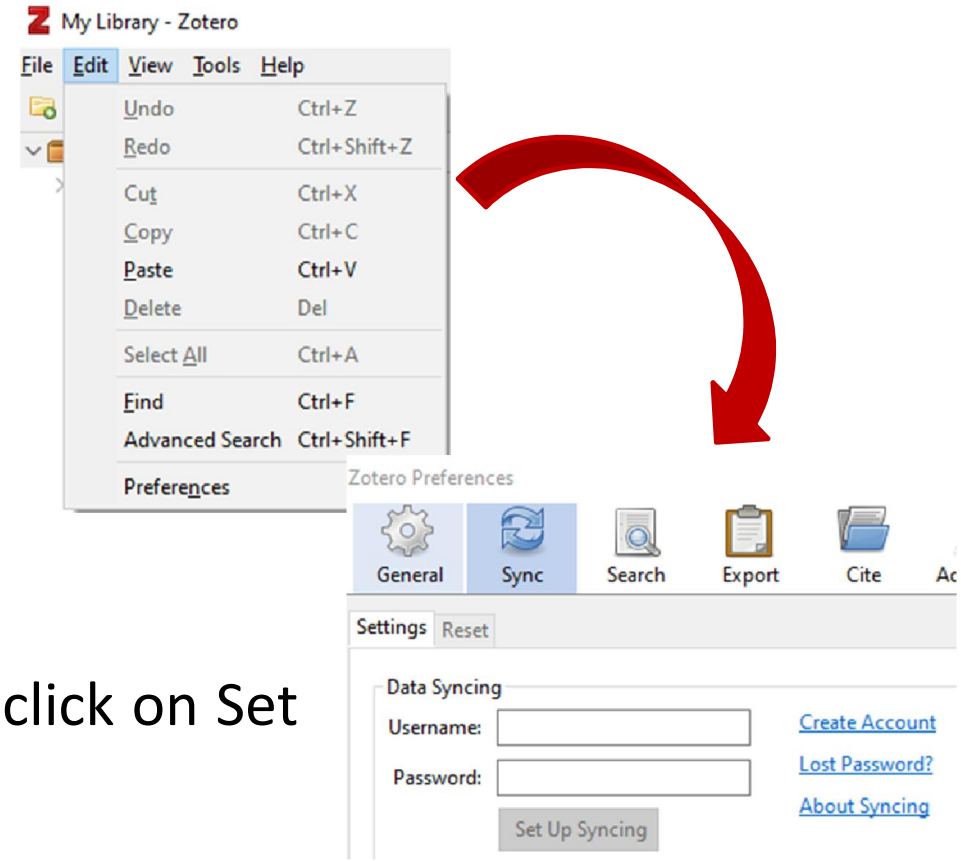
First of all…

1. Create an **account**
2. Install Zotero desktop (for Windows, Mac o Linux)
3. Install **Zotero connector:** it's a browser extension that helps import citation during web navigation
4. Install **Citation Plug-In** (for Microsoft Word, Libre Office ecc.): it allows to insert formatted citations in text file and to create bibliography

Zotero Desktop

The first time you access the desktop version of Zotero, you need to enter your account credentials:

1. Edit > Preferences > Sync



2. Settings > Data syncing
3. Insert your credentials > click on Set up syncing

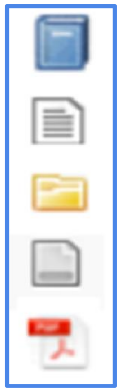
Bibliographic database

- It’s created by importing citations from the web or from files saved on the PC.
- Records appear in 'Web Library' (web version) or 'Personal Library' (desktop version)
- It’s possible to organize the database in folders: records remain in 'Personal Library' in any case.
- To align the archive (records and folders) on Zotero Web and Zotero Desktop click on the **Synchronise button**

Zotero Connector

The Zotero Connector's save button is the most convenient and reliable way to add items with high-quality bibliographic metadata to your Zotero library. As you browse the web, the Zotero Connector will automatically find bibliographic information on webpages you visit and allow you to add it to Zotero with a single click.

An icon will appear in the web address bar.
The icon changes according to the type of document.



Please note: if you have activated Proxy Docile in your browser you need to disable (not uninstall) it when using Zotero connector. You can still use the Proxy with the Auth-proxy service.

https://bibliotecadigitale.cab.unipd.it/en/search-tools/proxy/guide-to-the-auth-proxy-configuration

Indirect import

In order to import bibliographic references in some cases, it's necessary to follow the "export functions" from the database and create a file in RIS or BIBTEX format. Two different procedures are possible to complete the export:

1. Save the RIS or BIB file on your computer and then import it into Zotero > from Zotero Desktop > menu FILE > IMPORT
2. Download the RIS or BIB file without saving it on the PC but select "open with" and choose the Zotero application

Remember to always check the references you've captured!

Import PDF file

Drag and drop the PDF file of the article in Zotero and it will automatically extract all metadata (if any).

ATTENTION!

It only works with native PDF files, not scans!!

Storage PDF

Zotero free storage for attachments is up to 300 MB.

You can check how full your storage is from:
Zotero online > your profile at the top right > settings > storage.
Here you can also find subscription plans to increase space.

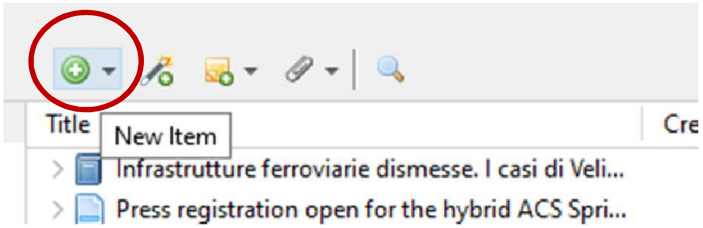
Tips for saving storage

Click on the paperclip icon on the top and choose:

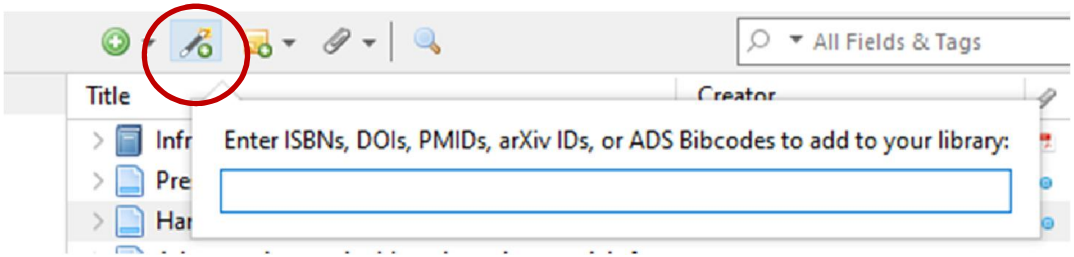
1. *Attach link to URI* (to add a link to a web page where the pdf is located)
2. *Attach link to file* (only works if you always use the same PC because in this case you will attach a link to a file on your hard disk)

Add entry manually

To insert the citation manually, select "New item“ on the top, you can choose the correct typology (book, magazine article, etc.) and fill in each field.



If you know the identifier (DOI, ArXivID or PMID) of one item, you can enter it clicking on the “magic wand”: the citation will be filled in automatically.



Check and correct imported records

You can correct the record during import by selecting a reference and clicking on the individual fields: they will become active and editable.

What to check:

- the "Type" of record chosen (book, article, website)
- correctness in filling in the individual fields

Getting your library organized

Collections and subcolletions

- hierarchical organization of files
- a reference can exist in multiple collections

Tags

- automatically added from the web
- manually added
- tag selector to manage your tags

Only on Zotero Desktop

Duplicates items: to control and merge duplicate entry

Advanced research: you can always search within your own references by author and title. Only in the desktop version is it possible to do an advanced search which allows more options.

Groups

With groups, you can collaborate remotely with project members, set up web-based bibliographies for classes you teach, and so much more.

Group Libraries are wholly separate from your personal My Library.

CREATING GROUPS > zotero.org > Groups > Create a new group

Groups

If you have enabled data syncing and are a member of a group, the group library will appear in Zotero's left pane.

Items can be dragged into a group from **My Library** or another group and viewed or edited by other group members, if their permissions allow it.

Groups

Public, Open Membership

- The group **page is public**, and anyone can **join instantly**
- The library can be shown or hidden to non-members
- Open public groups do not allow file sharing

Public, Closed Membership

- **Anyone can view the group page**
- It's necessary an **invitation to join** the group
- The library can be shown or hidden to non-members
- If administrators enable file sharing, group members can access and share files in addition to references

Creating bibliography - 1

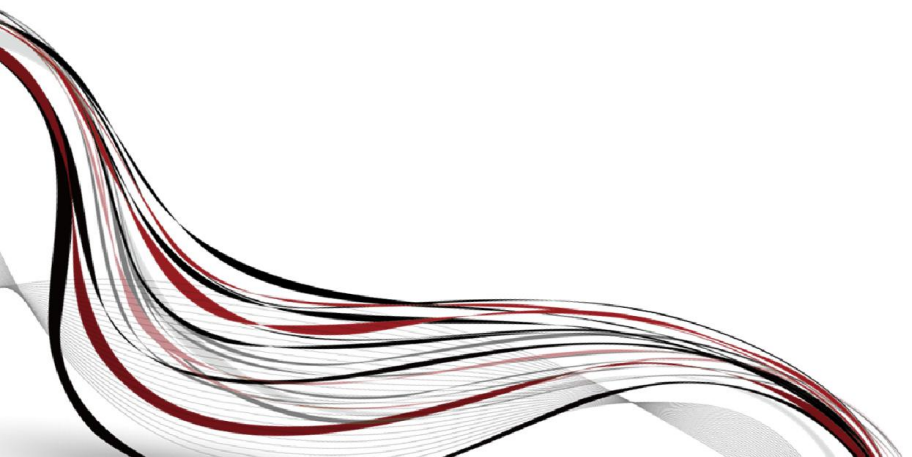
Bibliography (list of references starting with Zotero)

- choose one or more references and right-click to select “Create Bibliography from Selected Item(s)…” or starting from a folder click on “Create Bibliography from Collection”
- Select a citation style
- Select as output mode: **Bibliography**
- Select as otuput method: **Copy to clipboard**
- Finally paste over the text where you want to insert the bibliography

Attention!
In this case, the bibliography will not be updated if you insert additional references.

Choosing citation style

1) You can choose or change the citation style clicking on **Document preferences** on the toolbar.
2) If necessary, click on **Manage styles** at the bottom of the drop-down menu to open the **Styles window**.
3) You can view all available citation styles by clicking on **Get additional styles**



Citation Plug-In

- Allows you to automatically insert citations and notes within a document.
- The plug-in is downloaded automatically with Zotero Desktop.
- If it does not work correctly from the desktop version: **Edit** > **Preferences** > **Cite** > **Word processors** > **Install Microsoft Word Add-in**.
- It's compatible with Microsoft Word, Libre office, Google Docs, LateX
- To use it, log in to Zotero Desktop.

Insert citations

- Position the cursor where you want to insert your citation and press the **Add/Edit Citation** button on the toolbar.
- Select the citation style (you can always change it later)
- A red pop up appears where you can search for the bibliographic reference to be entered.

Clicking on **Classic View** instead, a list of all references in the personal library appears and, by choosing **Multiple Sources,** you can enter two or more citations at the same time.

Insert notes

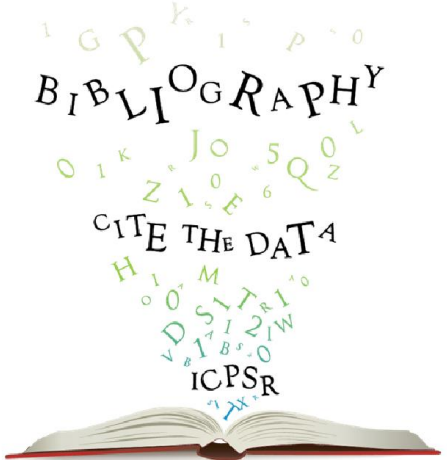
Position yourself at a point in the text and click on **Add Note**. A yellow box appears through which you can search for the note to be inserted into the text.

The note may have been entered manually in the reference in Zotero or generated as an annotation within the PDF document (e.g. an entire sentence to be quoted, a section, a comment)

Creating bibliography - 2

Citations and bibliography in a paper (insert bibliography in Word from citations)

- After inserting all citations in the text, place the cursor where you want the bibliography to appear and press the **Add/Edit Bibliography** button on the plugin toolbar.
- The list of the texts previously cited will appear in the chosen citation style.
- If you insert a new citations after this operation, the bibliography will up to date automatically



Final tips

- Since Zotero is a free software, if you have a lot of archived documents, it's recommended to back up your folders periodically
- If you are using computers shared by others, it's recommended, when you finish working in Zotero Desktop, to exit the program completely by selecting > **Edit** > **Preferences** > **Sync** > **Unlik account** > check "remove my zotero data from this computer"
- Zotero is constantly evolving, so it's useful to update your desktop version periodically > **Edit** > **Preferences** > **Advanced** > "Automatically check for updated translators and styles" > **Update now**

Zotero guides

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

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Thank you for your attention!

We are at your disposal

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