Manage your
bibliographic references
with

zotero

V.7

WORKSHOP HANDOUT

At the end of this workshop, you will be able to:

- Use different ways to import references into Zotero
- Attach full text documents (PDF) to your references
- Organize your Zotero library
- Create a bibliography with the Zotero plugin for Word
- Synchronize your Zotery library with an online account
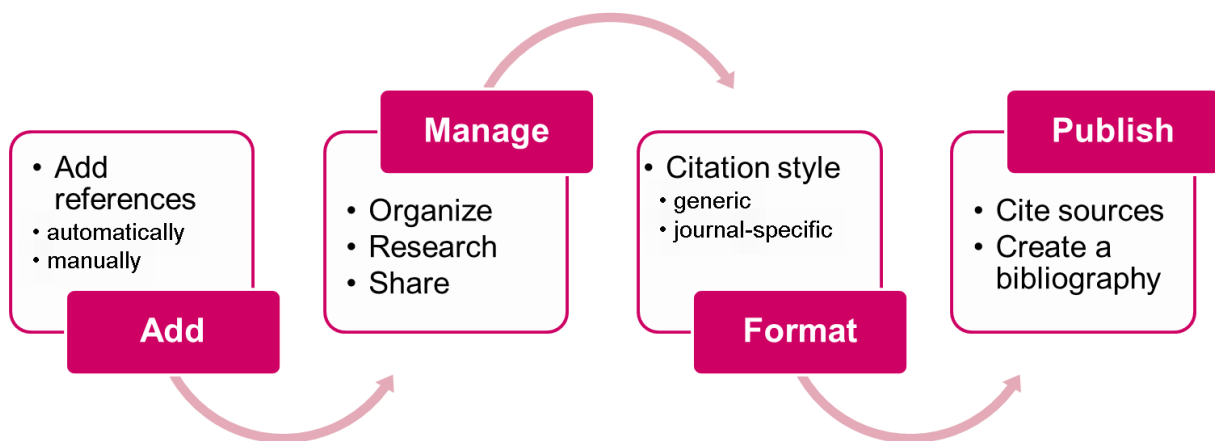
The latest version of this handout is available at:
https://unige.ch/-/zotero-handout

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INTRODUCTION

Zotero is a free software which allows you to manage your bibliographic references in a database and to generate bibliographies in a word processor. You can search, integrate, organize, sort out, format and export references.

If you use this kind of software when you begin a project, you can centralize, share and reuse your documents in different forms.

Add
- Add references
  - automatically
  - manually

Manage
- Organize
- Research
- Share

Format
- Citation style
  - generic
  - journal-specific

Publish
- Cite sources
- Create a bibliography

Zotero consists of:
- a **software** that is compatible with Windows, MacOS and Linux. You must download and install it on your desktop.
- a **plugin** in your **Word or LibreOffice** processor to insert your references citations and your bibliography. This plugin is automatically installed.
- a **plugin** for your **web browser** (called Zotero connector), which works with Firefox, Google Chrome, or Edge. This plugin will help you to collect your document references found on the web. You need to install it after installing the Zotero software, except for Safari where the web browser plugin will be installed automatically.

Learn more about Zotero compatibility:
https://www.zotero.org/support/system_requirements

The software and connector are free, and the source code is open source.

Other reference management softwares exist, such as: EndNote, Mendeley, BibTex, etc. A comparative table allows you to compare their main features (produced by the University Library of the Technical University of Munich):
- Böhner D. Reference Management Software Comparison [Internet]. Technische Universität München, Universitätsbibliothek; 2022. Available at: https://www.zotero.org/support/system_requirements

INSTALL ZOTERO

To install Zotero, open your browser and go to:
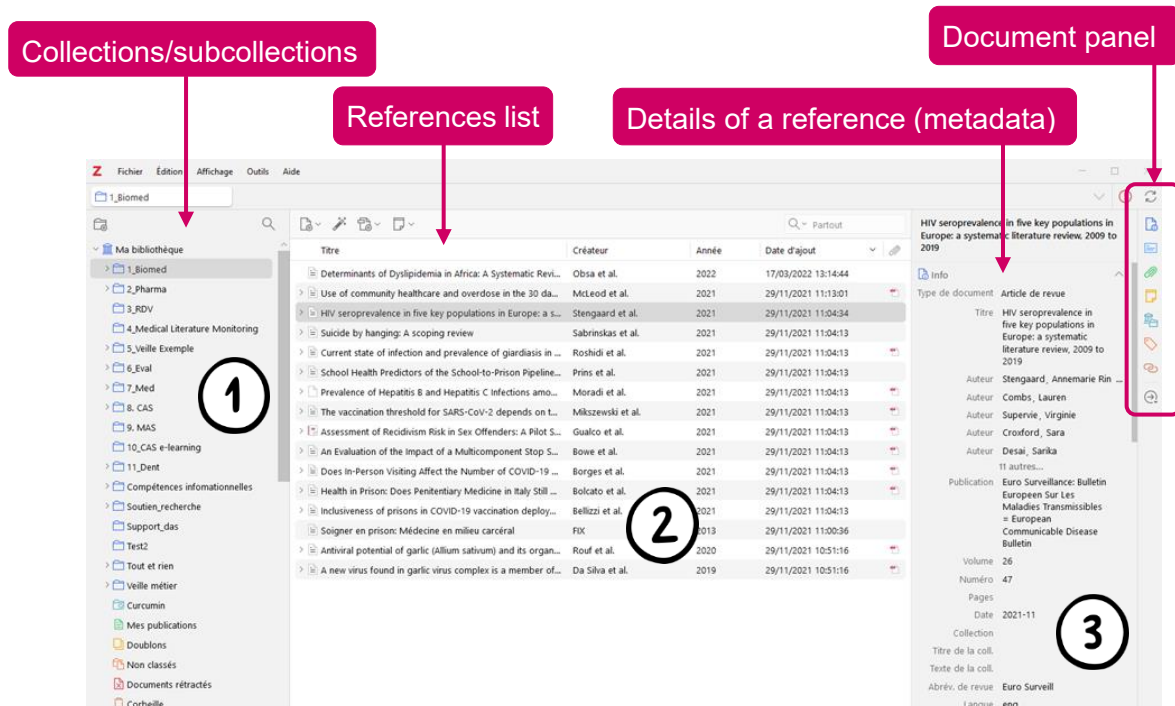
www.zotero.org

- Click on the *Download* button, then choose *Download Zotero 7 for Windows.*
- Then, install the *Zotero connector* on your web browser
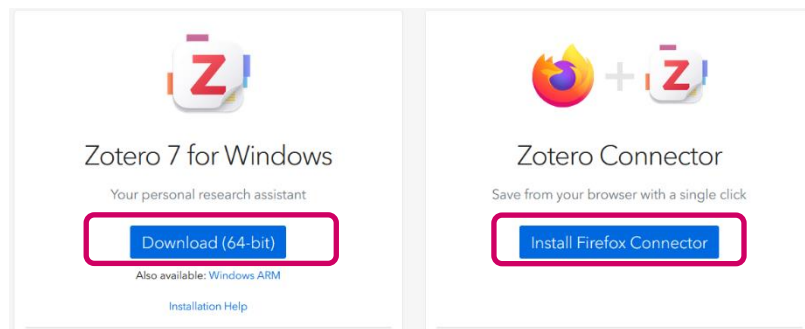
💡 *Note that the plugin for Word or LibreOffice is installed automatically.*

ZOTERO INTERFACE

The Zotero library is displayed in three columns and a document panel:

1. The first column is used to organize the references in your library into folders and subfolders, referred to in Zotero as **collections and sub-collections**.
2. The second column displays the **references** added to your library. You can customize the information displayed, such as the title and document type, by right-clicking to access a menu.
3. The third column shows the **details of the selected reference**.

At the right side, there is the **Document Panel:** Clicking on one of the icons allows quick access to the content of the different sections of the reference displayed.

    Info : Bibliographic data of the reference

    Abstract

    Attachments (Full text in PDF)

    Notes

    Libraries and collections to which the reference has been associated

    Tags

    Related (references)

    Locate (the full text online)

ADD REFERENCES INTO ZOTERO

You have several ways to add references into Zotero:

- **Manual entry**: allows you to create a reference by hand with the *New Item* button. First, you have to choose a document type (book, book chapter, article, webpage, etc.).

> 📌 Manually enter the reference for the following book:
> ⇨ Title: Collective Memory and the Dutch East Indies: Unremembering Decolonization
> ⇨ Author: Doolan, Paul M. M.
> ⇨ Series: Heritage and Memory Studies
> ⇨ Publisher: Amsterdam University Press
> ⇨ Date: 2021

💡 Manually adding a reference to your Zotero library is particularly useful for creating a reference for a **document that is not described or found on the Internet**, such as book chapters or unpublished sources (e.g., presentations, course handouts, your personal reports or academic works, etc.).

Manual entry can also be used to create a reference for a **generative artificial intelligence** tool, or its output. First, refer to the instructions provided by the teaching team regarding whether the use of AI is permitted in the course and any specific recommendations for citing it. Then, check the guidelines for the chosen citation style to determine how to properly reference the use of AI.

For more details and examples of generative artificial intelligence productions, see: https://unige.ch/-/zotero-iag-styles [in French].

- **Add item by identifier**: the magic wand allows to automatically add an item in your personal library from its identifier, e.g. a book's ISBN or an article's DOI.

> 📌 Add the article with the following DOI: 10.1016/j.compedu.2015.03.008

- **Automatic collection from your web browser**: when you are surfing on the web, you will see icons of documents in your browser toolbar; simply click on the icon to add the reference(s) displayed on the web page into your Zotero library. The icon can take different forms depending on the type of references that can be imported:

📁	Multiple references (list to select from)
📄	Journal Article
📘	Book
🖥	Web Page
📋	Report
🎓	These
📕	PDF file
<>	Software

Clicking this icon allows you to add the reference(s) displayed on the webpage to your Zotero library. With some publisher platforms, the full text in PDF format is also imported with the reference[1].

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[1] Automatic import of PDFs files can be disabled in Zotero settings:
- Windows: *Edit > Settings > General > File Handling > Automatically attach associated PDFs and other files when saving items*
- MacOS: *Zotero > Preferences > General > File Handling > Automatically attach associated PDFs and other files when saving items*

Example: Search for Zotero in the Swisscovery catalog:
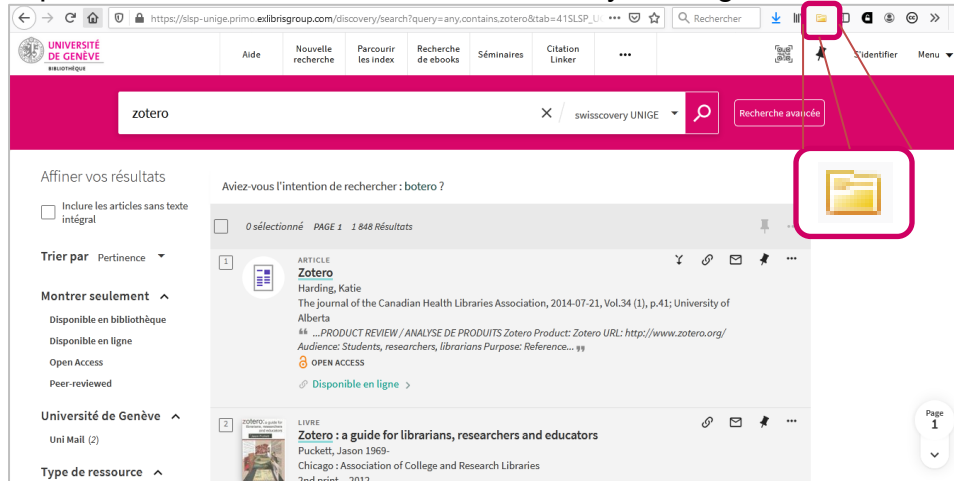
🔖 In the Swisscovery UNIGE catalog (https://unige.swisscovery.slsp.ch) search for the reference of the book **Cellular and Molecular Immunology, 10th ed., 2022** and add the reference to your Zotero using the icon displayed in your browser.

⇨ In Zotero, check the metadata of this reference

⇨ Which information should be corrected?

💡 *Book citation format: Author(s). Title of the book: Subtitle. Edition number ed. City: Publisher; Year.*

- **Importing reference files**: after performing a search in a database (PubMed, Web of Science, MLA International Bibliography, PsycINFO, Business Source Premier, etc.) and exporting the results in a file readable by Zotero (e.g. RIS, nbib), Zotero allows you to import this file into your library by going to *File → Import...* You can use this feature if you need to download a large quantity of references from a database.

- **Adding a reference from a PDF**:
  To retrieve metadata (authors, title, journal title, etc.) for an article previously saved as a PDF on your computer and import the reference into your Zotero library:
  1. Create the reference by selecting 🗏⌄ *Add Attachment → Add File… →* Choose the PDF file of the article.
  2. The PDF is imported, and Zotero automatically retrieves the metadata. (If this does not happen, right-click the PDF → *Retrieve Metadata*).

  However, this method works only for documents described on the web with metadata. If the PDF file does not contain metadata:
  - Create a new reference by right clicking the PDF file → *Create Parent Item* and manually entering the bibliographic details.

For all imports, remember **to always check that the data is correct and complete it if necessary**. For a bibliography created with Word and Zotero to be complete and accurate, the data describing the references (the metadata) must also be complete and accurate.

> 📌 From Zotero, add a PDF file that is currently on your computer.
> What happens?
> Is Zotero able to automatically collect the metadata from the PDF?

JOIN THE FULL TEXT OF PUBLICATIONS

To **find the full text** of a publication[2], Zotero offers several options:

1. **The reference has a DOI or URL**:

   - **To display the full text:** Right-click on the reference in Zotero and select *View Online.* Alternatively, in the side panel, click ⊙*Locate →View Online.* *Find Full Text*. If the full text is available online, you can download it.

   - **To find the full text:** You can find a PDF (either in Open Access or available through our subscriptions) corresponding to the selected reference by right-clicking on the reference in Zotero and selecting *Find Full Text*. This will import the PDF directly if it is found.
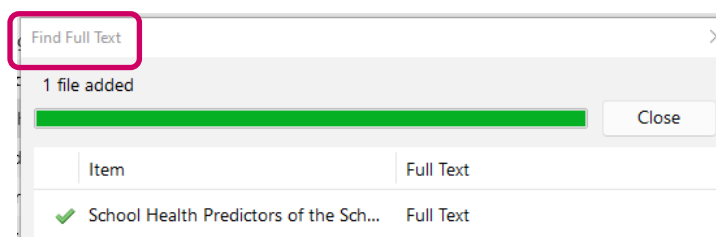
2. **The reference does not have a DOI or URL**:

   - Select the reference in Zotero and in the side panel, click ⊙*Locate →* *Library Lookup*. This option launches a search in the library catalog configured in Zotero. (To configure the catalog, go to *Edit → Settings[3] → General → Locate*. To use swisscovery UNIGE, select *Europe → Switzerland → University of Geneva* from the resolver drop-down menu.)

To **attach the full text** that has been localized and downloaded there are two options:

   - Right-click on the reference then select 🗒 *Add attachment → File*.
     - 💡 This option can also be used to attach to a reference other files already saved on your computer.

   - Drag and drop the file of the PDF to the corresponding reference into Zotero.

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[2] Electronic resources are accessible outside university buildings:
- for **UNIGE members**, using the VPN (https://catalogue-si.unige.ch/vpn) or by logging in to the publisher's website using OpenAthens (https://www.unige.ch/biblio/en/infos/equipment/internet/#openathens).
- for **HUG employees**: by logging in to the publisher's website using OpenAthens (https://www.unige.ch/biblio/en/infos/equipment/internet/#openathens).

[3] MacOS: *Zotero → Preferences*

MANAGE YOUR REFERENCES

Zotero offers many ways to search, arrange and sort out your references:

Collections: by default, all references are stored in *My Library*.
To create a collection or a subcollection, use the *New collection* icon (top left). To classify references into a collection, use the drag and drop method. A reference can simultaneously be classified in several collections.
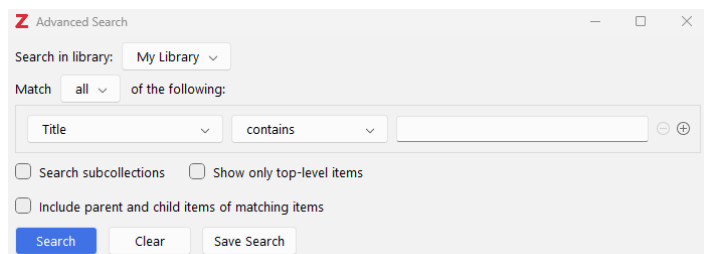References not assigned to a specific collection are under *Unfiled Items*.

Tags: by adding tags, you can improve the retrieval of relevant references within your library. To add tags to your reference, use the *Tags* panel in the right column. Depending on your Zotero preferences, tags can be automatically imported from databases (e.g. MeSH terms used to describe references in PubMed, or subjects from Swisscovery).

Simple and advanced research: in Zotero, you can use
- the *Quick Search* field [Q∨ All Fields & Tags] to search for text in any field of reference
- the *Advanced Search* to perform a more precise research within your references. It is available by clicking on the magnifying glass icon [Q∨] :

Saved research: a saved research is a collection that will be automatically updated if new references added in your library match the search criteria of the initial research.
To create a saved research collection, open the *Advanced Search* → enter your search criteria → click the *Save Search* button → give a name to your saved research collection.

Detect duplicates: Zotero shows you if you have some duplicated references in the *Duplicate Items* folder. Before merging the items, carefully check each field of each reference, to know which reference is most complete and will be the *master item*. The icon allows you to spot the differences in the references' fields. Simply select the field for which the entry is correct or most complete, then merge the items.

> 🔖 Create a collection and add the previously collected references to it.

CREATE A BIBLIOGRAPHY IN YOUR WORD DOCUMENT

When installing Zotero, a plugin is automatically added to Word (or LibreOffice), allowing to insert citations in a text and easily create bibliographies.

Modify the citation style

Insert a citation

Insert the bibliography

Insert a note as a citation
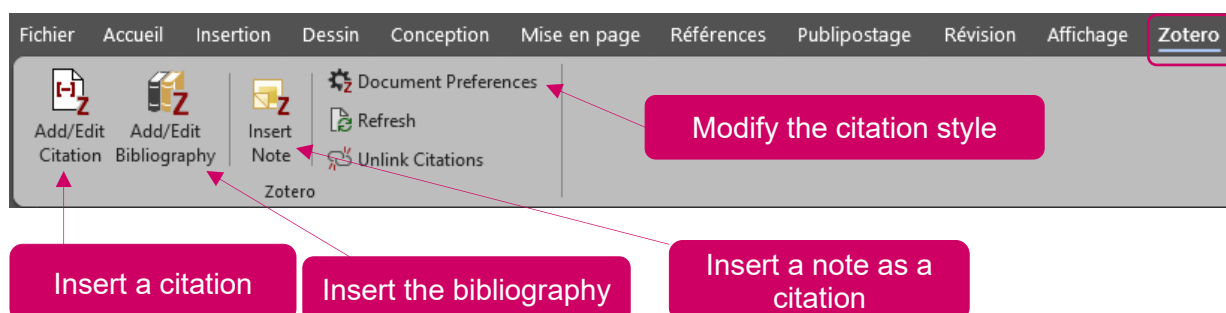
Before inserting the first citation in a document, Zotero prompts the user to select a citation style from those installed in the software. This choice can later be modified in *Document Preferences*.

As a reminder, citing sources in a document involves 3 steps:
1. Insert an exact quote within quotation marks in your text, or write a paraphrase
2. Insert an in-text citation immediately after the quoted or paraphrased text
3. Add the bibliography at the end of the document

The formatting of citations and bibliographies follows a **specific bibliographic style**, most often associated with a scientific field or discipline[4]. There are thousands of bibliographic styles, generally based on one of the following three generic models: **author-date, numerical, or footnotes**. The use of a bibliographic style allows for the standardization of the presentation of references: information useful for locating the document (such as the author, title, etc.) can be easily identified.

Using Zotero greatly facilitates the citation of sources. There are **two ways to insert a citation**:

1. Place the mouse's cursor after the direct quotation or paraphrase, then click on *Add/Edit Citation* → search and select the desired reference → click Enter. If needed, before integrating it, click on the citation again to enter the number of the cited page in the appropriate field.

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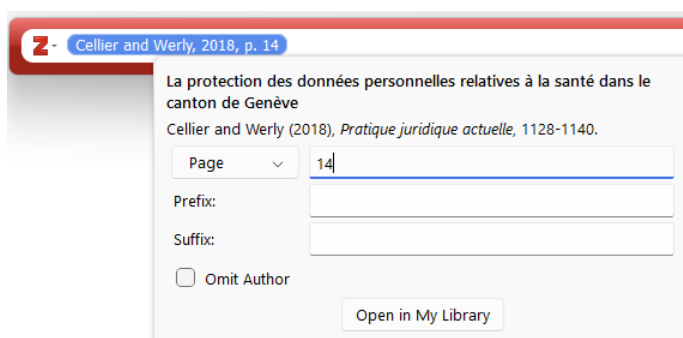
[4] Ask your teachers which style to use for assignments. If no specific style is required, choose a style that is appropriate for your discipline.

Insert Note (icon)

2   After highlighting or underlining a citation in a PDF and turning it into a note, to import it, click on *Add Note* and choose the desired existing reference.
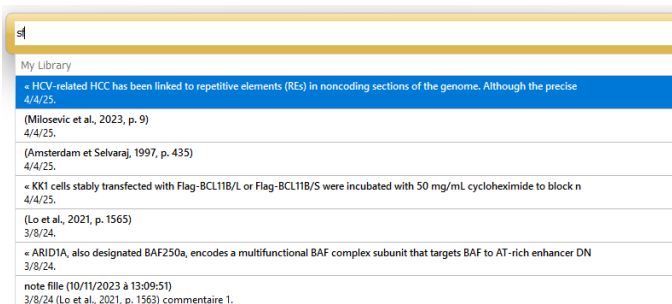
The citation will be automatically inserted in quotation marks into the text, followed by the reference callout, according to the previously selected citation style

For further information, see https://unige.ch/-/zoteropdfannoter [in French].

There are also **two ways to create bibliographies** with Zotero:

Add/Edit Bibliography (icon)

1. In Word, use the *Add/Edit Bibliography* button: the list of cited references automatically appears in the bibliography.

    References list vs. bibliography:
    By default, the *Add/Edit Bibliography* function generates a "references list" containing only the sources cited in the document. Zotero also allows adding additional references to create a "bibliography" that includes not only the cited references, but also other relevant materials that are not explicitly cited in the work. To do this, click on *Add/Edit Bibliography* → select the reference(s) to be added → click on the green arrow ⇒ → *OK*.

2. Directly from Zotero, select a collection or the desired reference(s) → right-click → *Create Bibliography from Items*.
    This method breaks the link between the bibliography and Zotero but is useful for organizing the bibliography into sections (e.g., by topic, document type, etc.) or for creating a standalone bibliography independent of a document.

12 citation styles are installed by default (*Edit → Settings → Cite*)[5].
To install additional styles: click on *Get additional styles* or visit the Zotero Style Repository (over 10,000 styles available): http://www.zotero.org/styles.

> 🔖 Open a Word document. Write a few words, then insert a citation for one of the references from your Zotero library.
> 🔖 Generate the bibliography using the *Add/Edit Bibliography* button in the plugin.
> 🔖 Change the citation style. What happens?

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[5] MacOS: *Zotero → Preferences*

SYNCHRONIZE YOUR ZOTERO LIBRARY ON SEVERAL COMPUTERS

If you install Zotero on a desktop at the University and would like to access it from your personal computer/laptop, you must create an account on the Zotero server. Afterwards, you will be able to access online to your whole library and synchronize it with several Zotero installations.

To create an account, go to www.zotero.org and click on *Register* (top right). Then, to synchronize your application with this account, go to the menu *Edit → Settings[6]*. Under the tab *Sync*, fill in the fields with the data of your Zotero account:
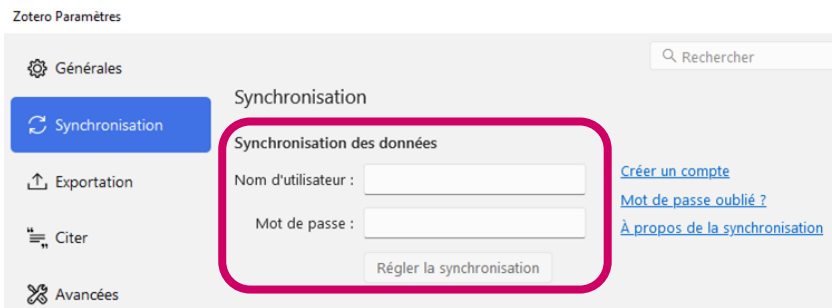
Be careful: *your account allows you to store only 300 MB of attached documents (full text, figures, etc.) for free on Zotero servers.*

COLLABORATIVE TOOL: GROUP

Through your Zotero account, you can share collections of references with your colleagues. To do it, click on *File → New Library → New group…* You are automatically redirected to Zotero website where you must fill in all requested information on the new group (name, access rights, members, etc.).

Launch the synchronization of your Zotero application with the icon $\circlearrowright$ (top right, in the panel) and your group will appear below your personal collections, under the *Group libraries* category.

To invite your colleagues to join your group, go on Zotero website, connect yourself and go to the *Groups* tab. Select the link *Manage members* of the correct group.

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[6] MacOS: *Zotero → Preferences*

CITE WHILE AVOIDING PLAGIARISM

InfoTrack, the UNIGE Library's information literacy training platform, offers short videos on citation practices and rules for avoiding plagiarism: http://infotrack.unige.ch/en

DOCUMENTATION

From Zotero:

- Quick start guide: https://www.zotero.org/support/quick_start_guide
- Support: https://www.zotero.org/support/
- Getting Help: https://www.zotero.org/support/getting_help

From the Library **[in French]**:

- *Organiser sa Bibliothèque Zotero* : https://unige.ch/-/zoteroorganiser
- *Annoter ses fichiers PDF dans Zotero* : https://unige.ch/-/zoteropdfannote
- *Référencer des IA génératives avec Zotero et les styles MLA, APA, Chicago, IEEE, Vancouver/NLM et CSE* : https://unige.ch/-/zotero-iag-styles
- *Travailler en mode collaboratif avec Zotero* : https://unige.ch/-/zoterocollaborer
- *Sauvegarder ses PDF Zotero avec Switch Drive* : https://unige.ch/-/zoteroswitchdrive

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