

Reference Management

Hands-on training: Zotero

Prep

- ✓ Open Firefox browser
- ✓ Check if the Word Processor Plugin is installed (https://www.zotero.org/support/word_processor_plugin_installation)
- ✓ Open the following links in your browser (Firefox):
 - <http://bib.telegrafenberg.de/quick-links/web-of-science/>
 - <http://www.sciencedirect.com/>
 - <http://bib.telegrafenberg.de/quick-links/albert/>
 - <http://www.nytimes.com/section/science>
 - <http://www.eia.gov/todayinenergy/detail.cfm?id=25932>

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<http://bib.telegrafenberg.de>

(July 2017)



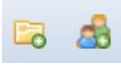
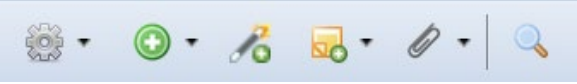
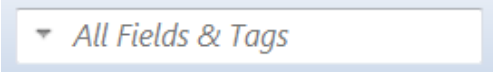

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Zotero Basics // 15 min.

Zotero user interface: 1-3 level – Windows in Zotero

- 1 Level: Collections, Groups and Tags
- 2 Level: Reference overview or content of one collection
- 3 Level: Detailed information on one item

Toolbar

New collection New group	
Actions New item Add item(s) by identifier New note Add attachment Advanced search	
Search field	
Sync with Zotero server Toggle Tab Mode Close	

Columns in reference window

→ Click on the icon in the right corner of your reference window and display the following:

- ✓ Creator
- ✓ Item Type
- ✓ Year
- ✓ Date Added
- ✓ Attachments
- ✓ Notes

Preferences

Click on action (grey wheel) → Preferences

Deactivate Snapshots

→ Open the register General and deactivate the option for snapshots

PDF-Indexing

→ Open the register Search and install PDF Indexing add-in

Styles

→ Open the register Export and select your preferred style in the dropdown menu.

If your style is not available, go to the next register Cite and search within the Style Manager or get more styles online

SFX resolver

→ Go to the register Advanced and put in the following resolver:
http://sfx.kobv.de/sfx_wae/


Tags in Zotero

Group libraries

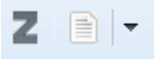
Synchronize via Web-Account

DEMO

1. Create a new collection in Zotero

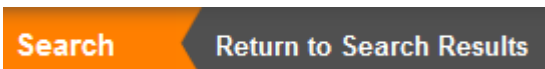
- Open Zotero in your browser and click on the icon for “new collection” 
- Name your collection “Zotero Workshop”
- Select the new folder so you can save your references in this collection


2. Save a journal article from the Web of Science

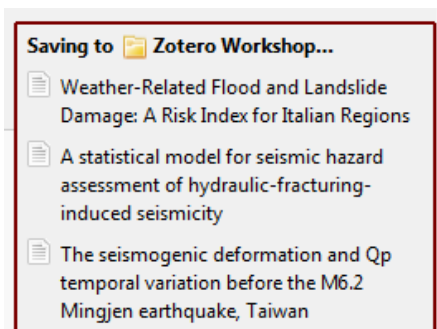
- Go to <http://bib.telegrafenberg.de/quick-links/web-of-science/>
- Search for “Natural hazards + Year=2015”
- Open the first article in your results list
- Click on the paper icon next to your Z icon in your browser 
- Check the imported reference in your new collection (Item type, title, author, date etc.)

3. Save from a reference list

- Go back to the results page in the Web of science



- Click on the folder icon next to your Z icon in your browser 
- Select all references from the list dialog and click OK

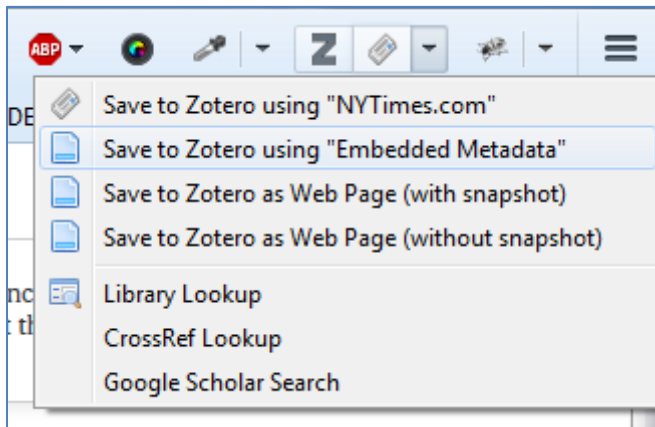


- Check all imported references

→ You can sort by column “Date Added” to see the newest items/recently added items

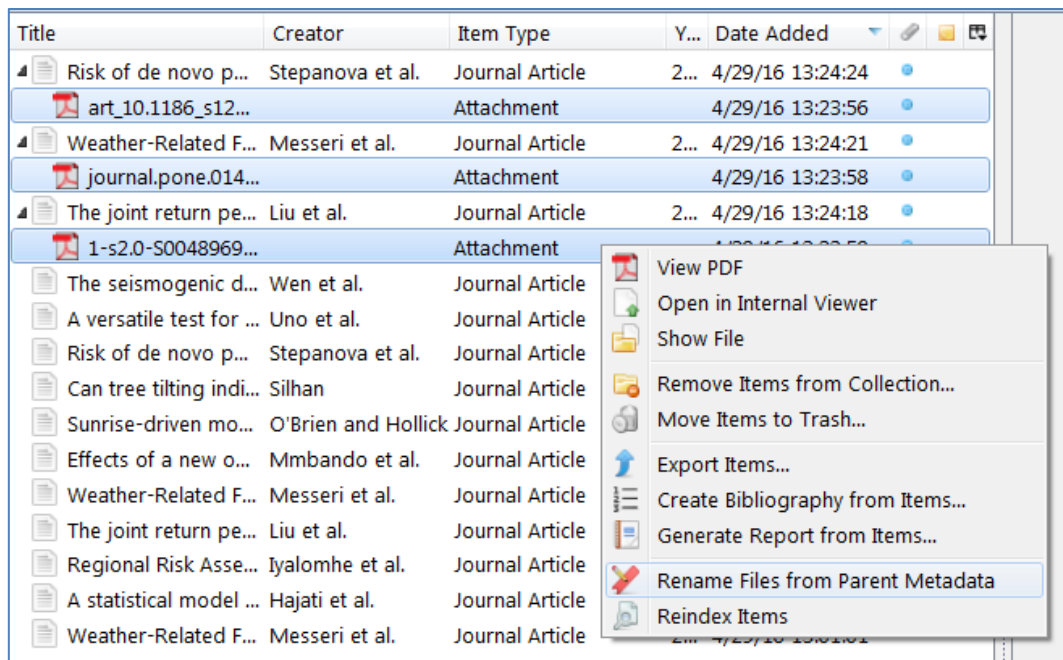
4. Save a news article

- Go to the NYTimes Science section
<http://www.nytimes.com/section/science>
- Open one article
- You can now either import the reference by clicking on the newspaper icon in your toolbar (next to the Zotero icon) or use the dropdown menu and “Save to Zotero using Embedded Metadata”



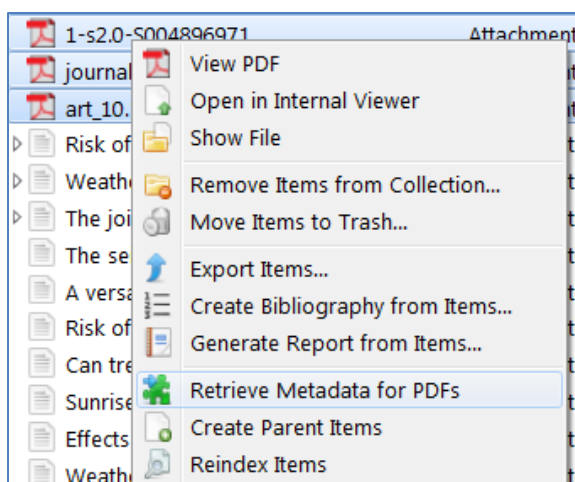
5. Import references & full texts from a full text database like Science Direct

- Go to ScienceDirect" (<http://www.sciencedirect.com>)
- Search for “Natural hazards + Year=2015” (advanced search)
- Click on the folder icon next to your Zotero icon in your browser toolbar 📁
- Select all references from the list dialog and click OK→ Zotero will import full texts (pdf) if possible
- Select one reference with full text and click on the arrow/drop down menu
- Right-click on the pdf and choose the option “Rename file from parent metadata”

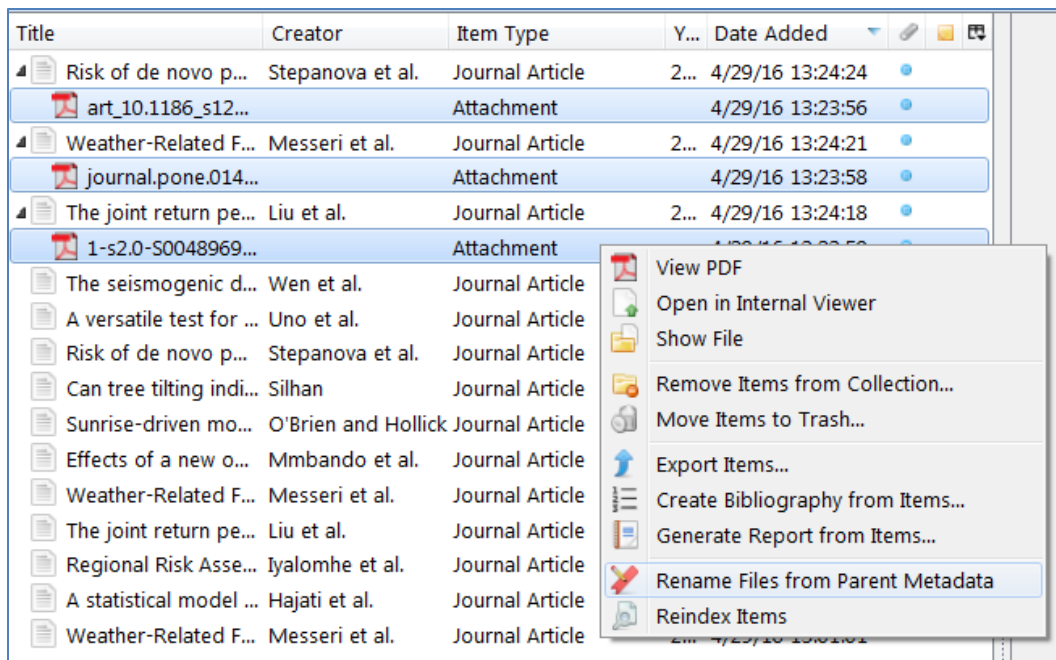


6. Import references from PDFs

- Open a folder with pdfs on your computer and drag&drop your pdfs into your collection (or use the green + icon in the toolbar → store copy of file)
- Highlight all references
- Right-click → Retrieve metadata for pdfs



- Check the imported metadata
- Select the attached pdfs and run the function "Rename file from parent"



7. Save references/books from the library catalogue/discovery system

- Go to our library search engine “Albert” (<http://waesearch.kobv.de>)
- Search for “Natural hazards” and refine/choose the books collection on the left side
- Click on the folder icon in your browser
- Save some books in your collection
- Check the imported reference via column “date added”

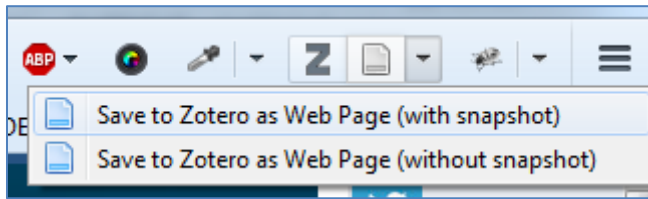


8. Save a website with snapshot

→ If there are no embedded metadata on a website/database, you can also save the information as a website with a snapshot. This way you can easily access the information on the website without online access or in case the website is not available anymore.

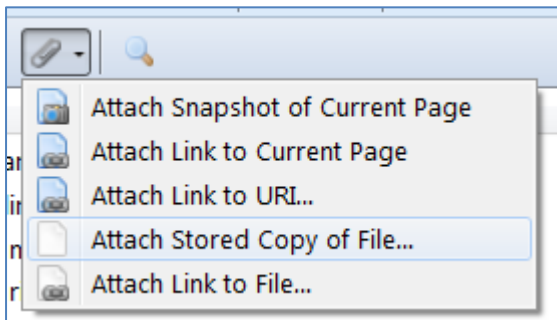
- Go to <http://www.eia.gov/todayinenergy/detail.cfm?id=25932>
- In your browser click on the dropdown menu next to the Z and choose “Save to Zotero as Web Page (with snapshot)”
- Go to Zotero, find the website entry and open the snapshot

- You can add some more information in the reference metadata → contributor for example



9. Attachments

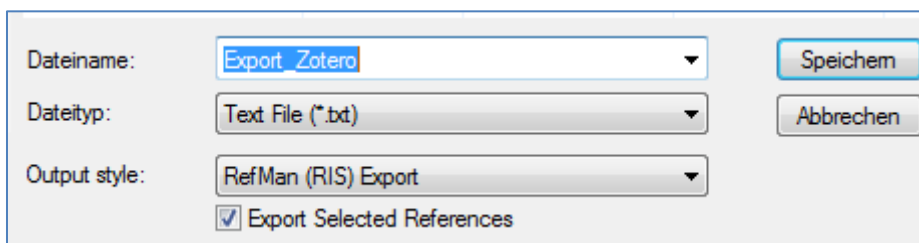
- Download a pdf to your computer or use one from the workshop set
- Got back to Zotero and highlight a reference
- Add the pdf by selecting "attach saved copy of file" from the attachment icon or simply drag and drop it onto the reference
- Right-click on the pdf and choose the option "Rename file from parent metadata"



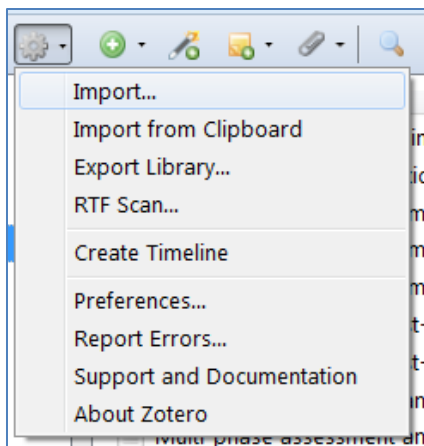
→Zotero will save a copy of the pdf in the data storage

10. Import data from another reference manager (EndNote)

- Go back to EndNote and highlight some references
- Go to File→Export
- Choose txt as type and RefMan (RIS) Export as Output style
- Save file



- Go back to Zotero and click on Actions (grey wheel)→Import
- Open the Export from EndNote
- Zotero will automatically create a new collection for the import
- Check the imported references – Zotero might import further information as notes



11. Organise your library

- Create a new folder/collection in Zotero
- Move your references into one or both of these folders

12. Check duplicates

- Import search results from No. 2 again
- Go to “My library”
- Select the collection “Duplicate items”
- Go through your duplicates and merge the items

Title	Creator	Item Type	Y...	Date Added			
▶ Risk of de novo p...	Stepanova et al.	Journal Article	2...	4/29/16 13:24:24	•		
▶ Weather-Related F...	Messeri et al.	Journal Article	2...	4/29/16 13:24:21	•		
▶ The joint return pe...	Liu et al.	Journal Article	2...	4/29/16 13:24:18	•		
▶ Risk of de novo p...	Stepanova et al.	Journal Article	2...	4/29/16 13:05:22			
▶ Weather-Related F...	Messeri et al.	Journal Article	2...	4/29/16 13:05:22			
▶ The joint return pe...	Liu et al.	Journal Article	2...	4/29/16 13:05:22			
▶ Weather-Related F...	Messeri et al.	Journal Article	2...	4/29/16 13:01:01			

Merge 3 items

Choose the version of the item to use as the master item:

- 29.4.2016 13:01:01
- 29.4.2016 13:05:22
- 29.4.2016 13:24:21

Select fields to keep from other versions of the item:

Type: Journal Article

Title: Weather-Related Flood and Landslide Damage: A Risk Index for Italian Regions

Author: Messeri, Alessandro

Author: Morabito, Marco

Author: Messeri, Gianni

Author: Brandani, Giada

Author: Petralli, Martina

Author: Natali, Francesca

Author: Grifoni, Daniele

Author: Crisci, Alfonso

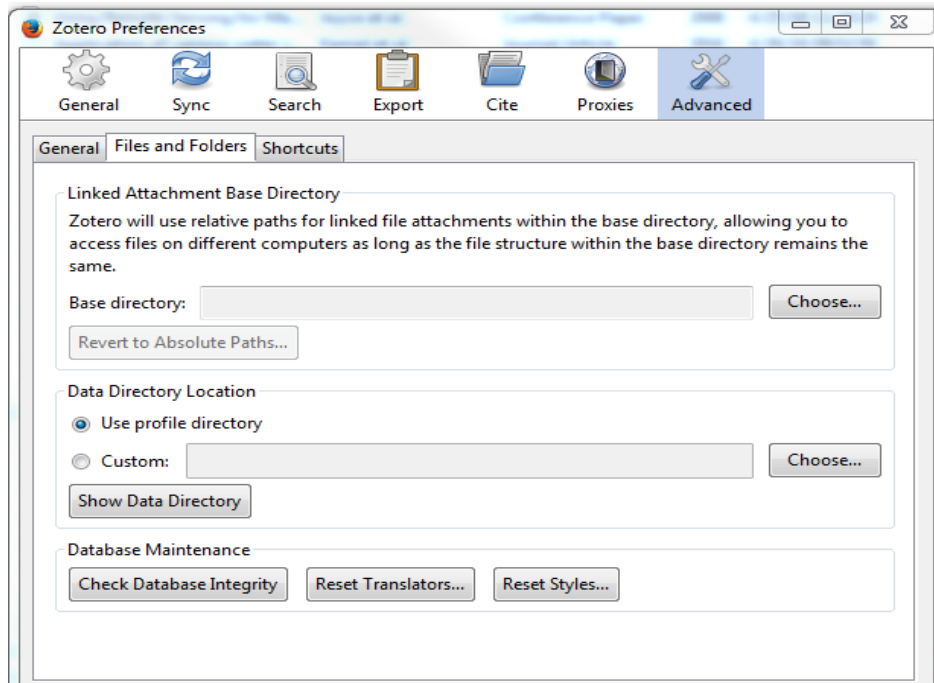
Author: Gensini, Gianfranco

Author: Orlandini, Simone

Title	Creator	Item Type	Y...	Date Added			
▶ Risk of de novo p...	Stepanova et al.	Journal Article	2...	4/29/16 13:24:24	•		
▶ Weather-Related F...	Messeri et al.	Journal Article	2...	4/29/16 13:24:21	•		
▶ The joint return pe...	Liu et al.	Journal Article	2...	4/29/16 13:24:18	•		
▶ Risk of de novo p...	Stepanova et al.	Journal Article	2...	4/29/16 13:05:22			
▶ Weather-Related F...	Messeri et al.	Journal Article	2...	4/29/16 13:05:22			
▶ The joint return pe...	Liu et al.	Journal Article	2...	4/29/16 13:05:22			
▶ Weather-Related F...	Messeri et al.	Journal Article	2...	4/29/16 13:01:01			

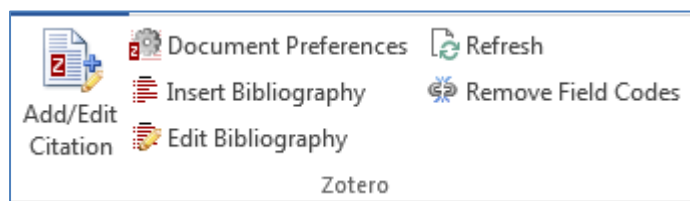
13. Backup your library

- Open Zotero Preferences
- Advanced→ Files and Folders→ Show data directory
- Copy the complete zotero folder
- Paste to your storage medium



14. Use the Word / Writer Add-in

- Open a sample text file in Word & check the Zotero toolbar/register
- Use the Zotero toolbar to generate in-text citations
- Click on Add/Edit Citations



- Select a reference style
- Find a references by typing into the search field
- You can also switch to "Classic Mode" to browse your references in Zotero



15. Add a new page for your reference list in word and use Zotero to generate a bibliography

- Create a new page in your manuscript and type a new headline like: Bibliography
- Open the Zotero register
- Click on "Insert bibliography"