Lib4RI

Spring 2024

Literature management with Zotero

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Lib4RI

Lib4RI Training series:
Searching & Managing Scientific Information

- Module 1: Searching Scientific Information

- Module 2: Scientific Publishing

- Module 3: Open Access & Copyright

- Module 4a: Literature Management with Endnote

- **Module 4b: Literature Management with Zotero**

- Module 5: Getting started with LaTeX

- Module 6: Work on Your Own Project

- Module 7a: Research Data Management – The Basics

- Module 7b: Make your life easier with Git

- Module 8a: AI Made Easy

- Module 8b: AI in Research & Scientific Writing

Lib4RI
Searching & Managing Scientific Information
Training series

Spring 2024

Modules:
1   Searching Scientific Information
2   Scientific Publishing –
    From Writing to Sharing
3   Open Access & Copyright
4a Literature Management with EndNote
4b Literature Management with Zotero (NEW)
5   Getting Started with LaTeX
6   Work on Your Own Project
7   Research Data Management – The Basics

Course sites:
Eawag: Dübendorf
Empa: Dübendorf
PSI: Villigen
WSL: Birmensdorf

Online registration:
www.lib4ri.ch/trainings

Your feedback is appreciated!

○ Help us improve our training by returning the feedback form enclosed in your documentation!

○ The course slides and supplementary material are available online on our website at www.lib4ri.ch > Learn> Trainings

Outline

9:00 – 9:15   Introduction to literature management

9:15 – 10:45   Hands-On Zotero I

10:45 – 11:00   Break

11:00 – 12:30   Hands-On Zotero II

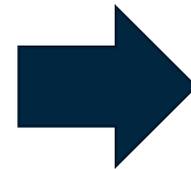# Where are you in your PhD journey?

Just starting · · · · · Preparing your first publication(s) · · · · · Almost completed

Collecting information · · · · · Put your research in context

Adobe Firefly: "an unsorted pile of research papers on a messy table"

Colleting stuff is easy -
finding it again can be difficult...

Lib4RI

Literature management software helps to:

Organize

○ Gather and import information

○ Read, mark and annotate

○ Group and connect resources

Open source

zotero

JabRef

Cite

○ Compile a consistent bibliography

○ Adapt citations to the journal style

Commercial

EndNote™

citavi

Collaborate

○ Share references with your co-authors

MENDELEY
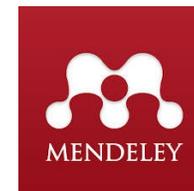
and many more…

Zotero

- Free and open source

- Well-structured interface and powerful integrated reader (V6 and higher)

- Import with one click

- Cite-while-you-write

Browser connector
(install separately)

Main installation

Word processor plugin
(included in main installation)
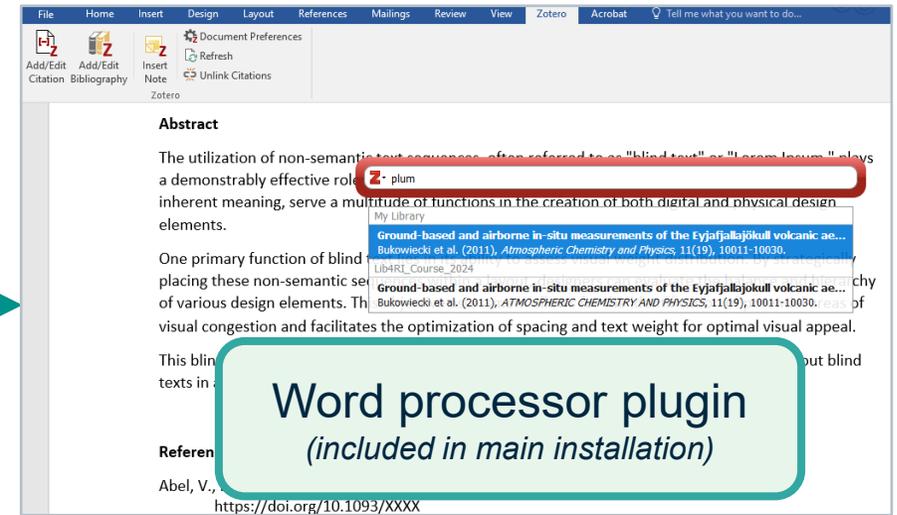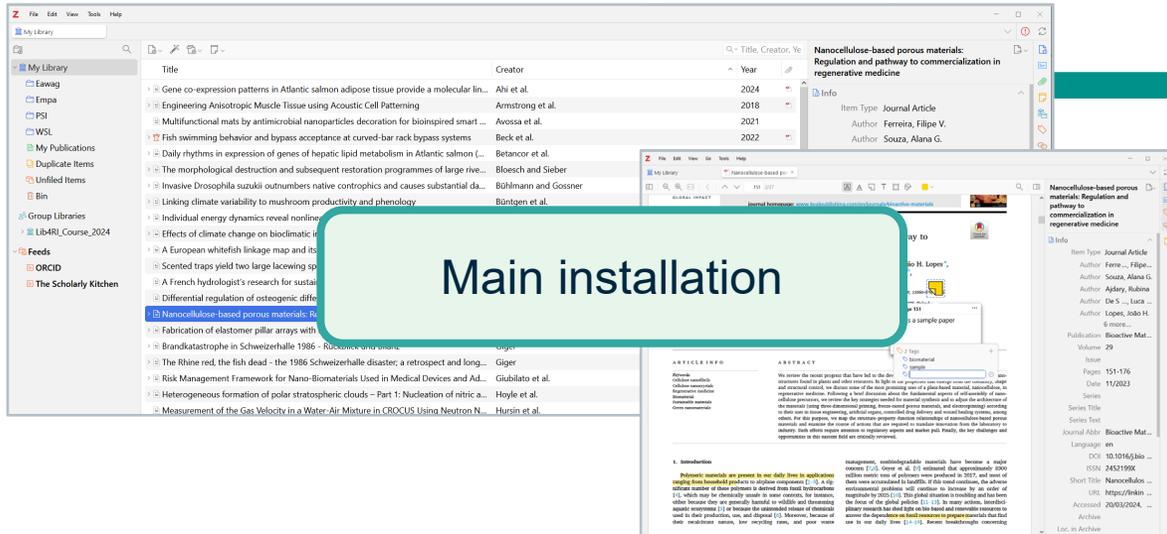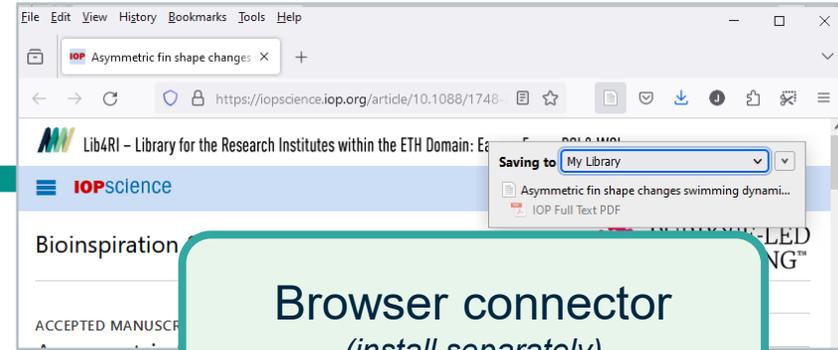
System requirements

Main installation

○ Windows 7 or later, macOS 10.11 or later, Linux

○ *Not tested: iOS, Android (Beta Version)*

> Used for this lecture:
> - Zotero 7
> - Firefox 135
> - MS Office 365

Browser connector

○ Chrome 55 or later, Firefox 60 or later, Safari on macOS Big Sur or later

Word processor / Writing

○ MS Word 2010-2021, Office 365

○ Word for Mac 2016-2021 or Office 365

○ *Not tested: Libre Office 5.2 or later*

Other options

○ Google docs

○ Overleaf (premium account or import *.bib)

○ Quarto, *Jupyterlab (not tested)*

Check your installation

You should see:

○ Desktop shortcut and/or menu entry to start main installation

○ Zotero tab in you text editor
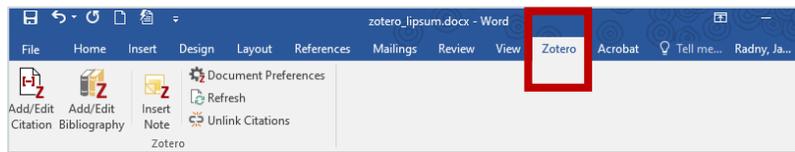
○ Symbol in your browser (varies with item type)

Not visible?
Make sure the add-on is activated!
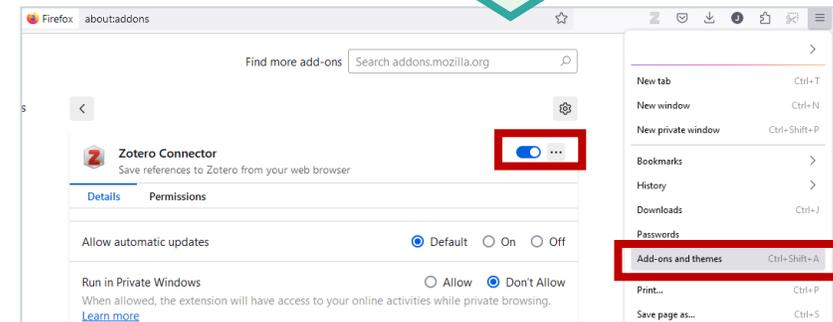
Hands-on literature management

Five step for literature management

○ **Step 1:** Get literature into Zotero

○ **Step 2:** Organize your library

○ **Step 3:** Read, annotate, summarize

○ **Step 4:** Cite-while-you-write

○ **Step 5:** Sync and collaborate

Step 1: Get literature

Finding literature
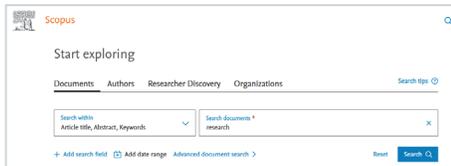
scopus.com
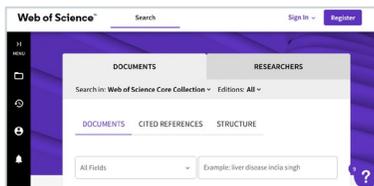
webofscience.com

scholar.google.com

lib4ri.ch

dora.lib4ri.ch

openalex.org

arxiv.org/ (pre-prints)

More info? Check out our resources!

- Training: Searching Scientific Information
- Info sheet: Topic Search
- Website: Systematic literature search
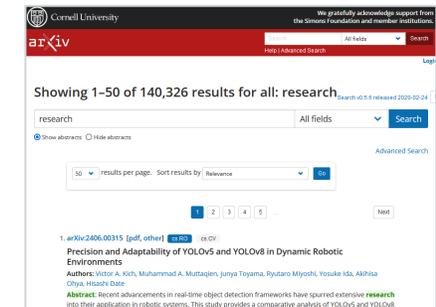
Import via browser connector

Item => Unique entry in your library

Attachments, e.g. PDF, note…

Metadata and additional information

Item types

○ Depending on the item type, different metadata is included, e.g.

   ○ Publication (journal name) for articles

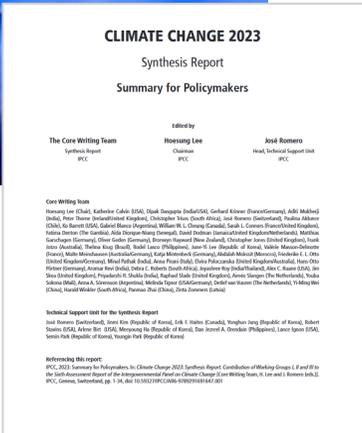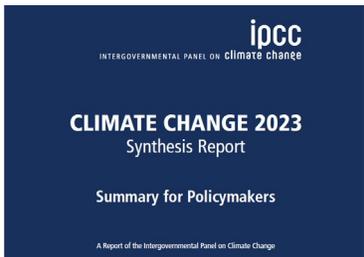   ○ Edition number for books

   ○ Access date for web resources

   ○ ….

Other import options I

○ *File > Import* for collections, e.g. other reference managers (*.bib, *.ris)

○ Import wizard for DOI, arXiv IDs etc

○ Add by hand
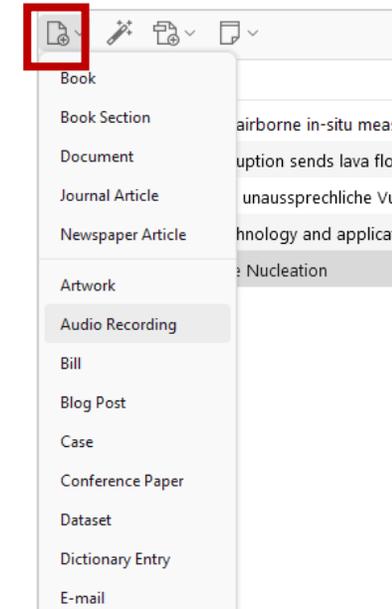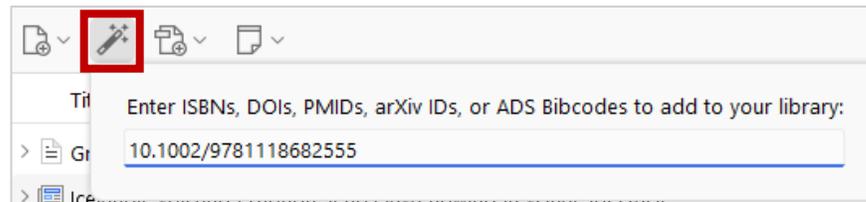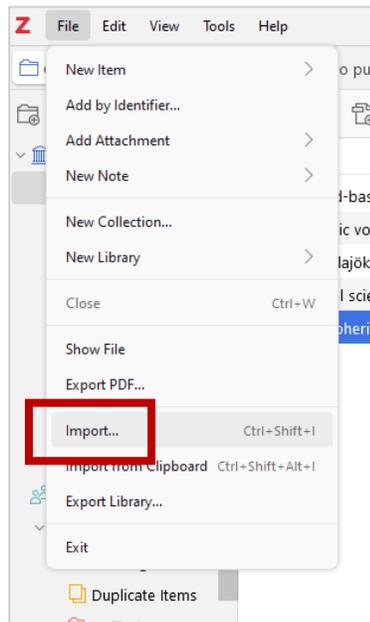
Other import options II

○ Drag & Drop PDFs – metadata is searched and added

○ Missing information can be added manually

Hands-On: Add literature

N. Bukowiecki *et al.*, **Ground-based and airborne in-situ measurements of the Eyjafjallajökull volcanic aerosol plume in Switzerland in spring 2010**, *Atmospheric Chemistry and Physics*, vol. 11, no. 19, pp. 10011–10030, Oct. 2011, doi: 10.5194/acp-11-10011-2011.

Task: Import to your Zotero library from

➢ Web of Science

➢ Scopus

➢ Google Scholar (directly from Google page, not through the link!)

➢ Zotero import wizard using the DOI number

○ **Can you detect any differences?**

Hint: Get all links directly via the Lib4RI search tool

Metadata may differ between sources

- Google Scholar did not retrieve an abstract or DOI, but provides **author full names**

- Web of Science includes **keywords** (more: support.clarivate.com), publication name is all caps

- Scopus provides **citation count** as note

- DOI import (via Crossref) provides **rights information – relevant for re-use and sharing!**
 See lib4ri.ch/copyright-cc-licences for more information

Keep in mind:

- Metadata can be incomplete

- Errors may happen, especially with third party sources

- Encoding or typesetting can be different (special characters, all caps…)

Good news: In general a minor problem and if necessary cleaning metadata is easy

Single import

- Only one item with metadata is available

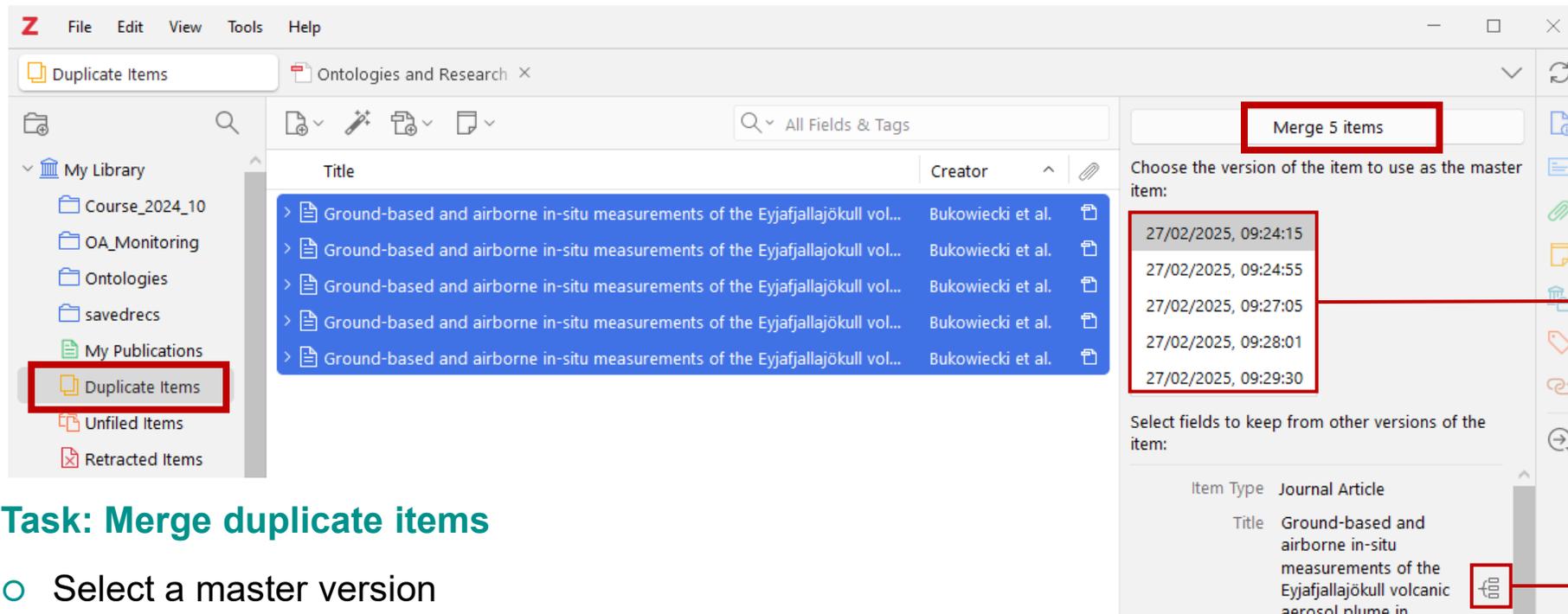- Various item types with different metadata entries
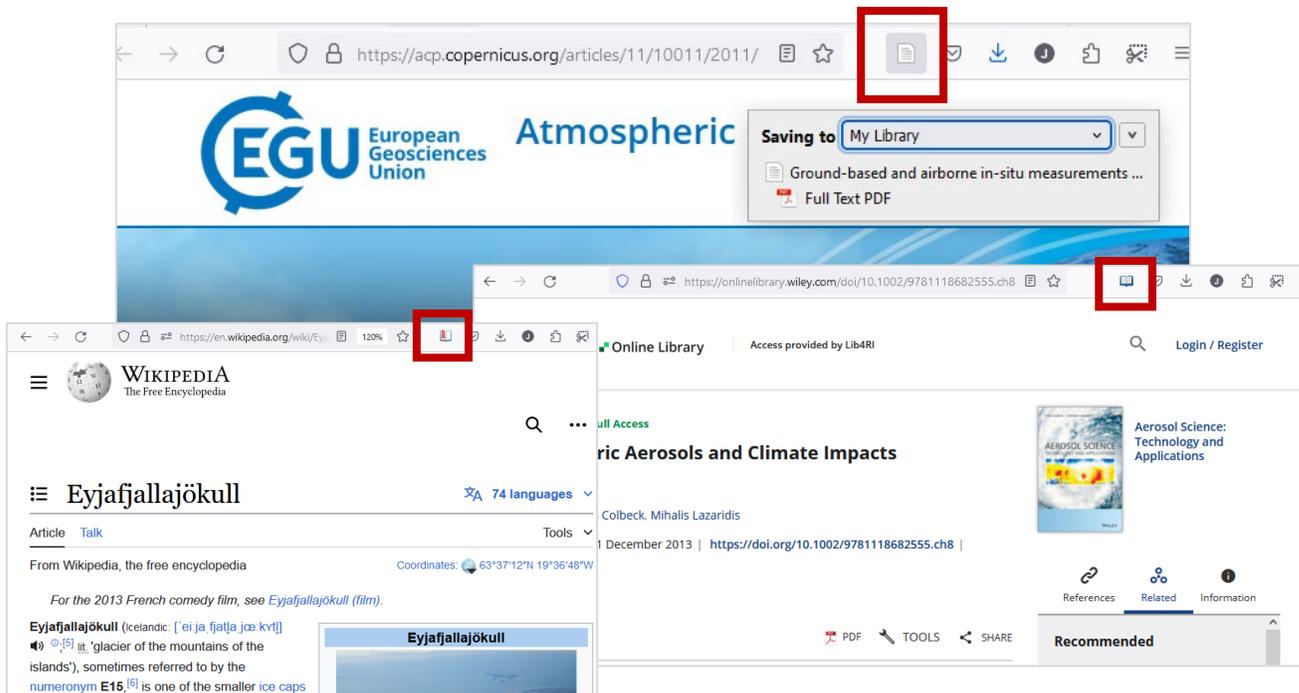
Bulk import

- Several items with metadata are available

- Select the desired items
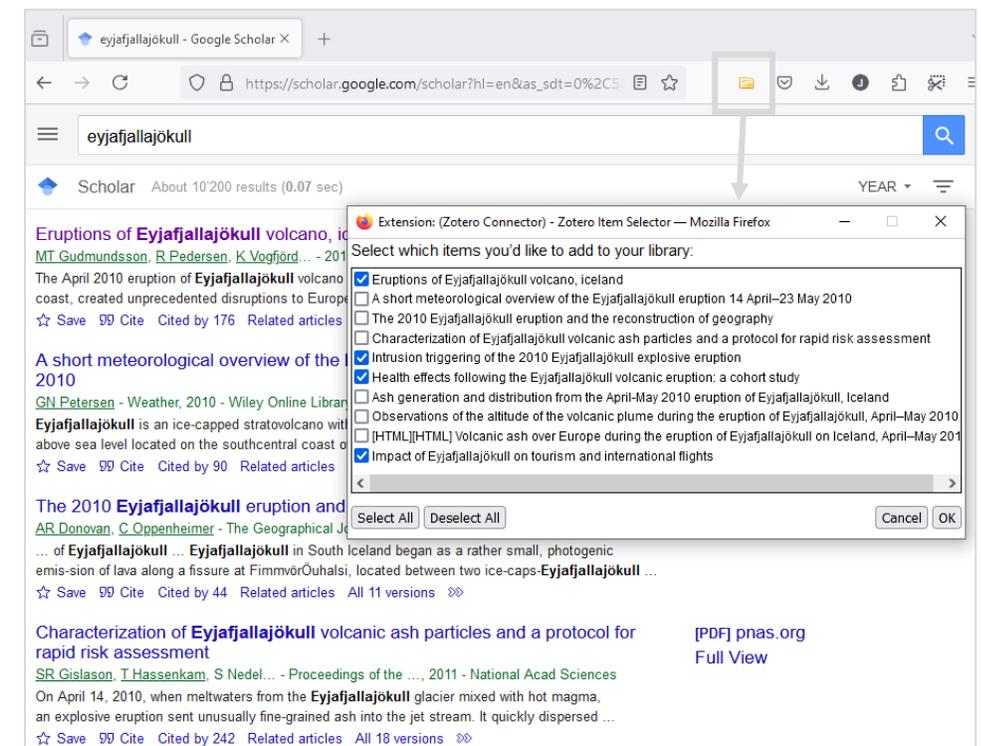
Step 2: Organize your library

Hands-On: Tidy-up your library

Master item defines all fields

Versions can be specified

Task: Merge duplicate items

○ Select a master version

○ Specify field versions to include:

➢ Author full names

➢ Title with umlaut

➢ Journal title is **not** all caps

➢ Journal abbreviation

➢ Rights information

➢ DOI

Notes on merging

Current bug(?):

○ V 7.011 allows only shows *Info* to merge -> abstract can get lost

Matching:

○ Sometimes items are not recognized as duplicates (e.g. typos)

○ Select items to be merged and right-click to enforce merging

○ All items of the same type can be merged, e.g. journal article with journal article, but not book section

Attachments remain after merging:

○ Keywords and tags

○ Notes

○ In-text annotations are merged across PDFs

Organizing your library

- Main and default: My Library
  - Cannot be deleted or renamed
  - Contains all items
- Organize items in personal collections
  - Drag & drop items to **copy** into any collection
  - Hold Shift (Win/Linux) or Cmd (Mac) to **move** items from one collection to another
- Automatic collections are created by Zotero
  - Add your own publications, if wanted
  - Unfiled items are not part of any collection
  - Retracted items spill a warning when you attempt to cite them (Information source: retractionwatch.com)
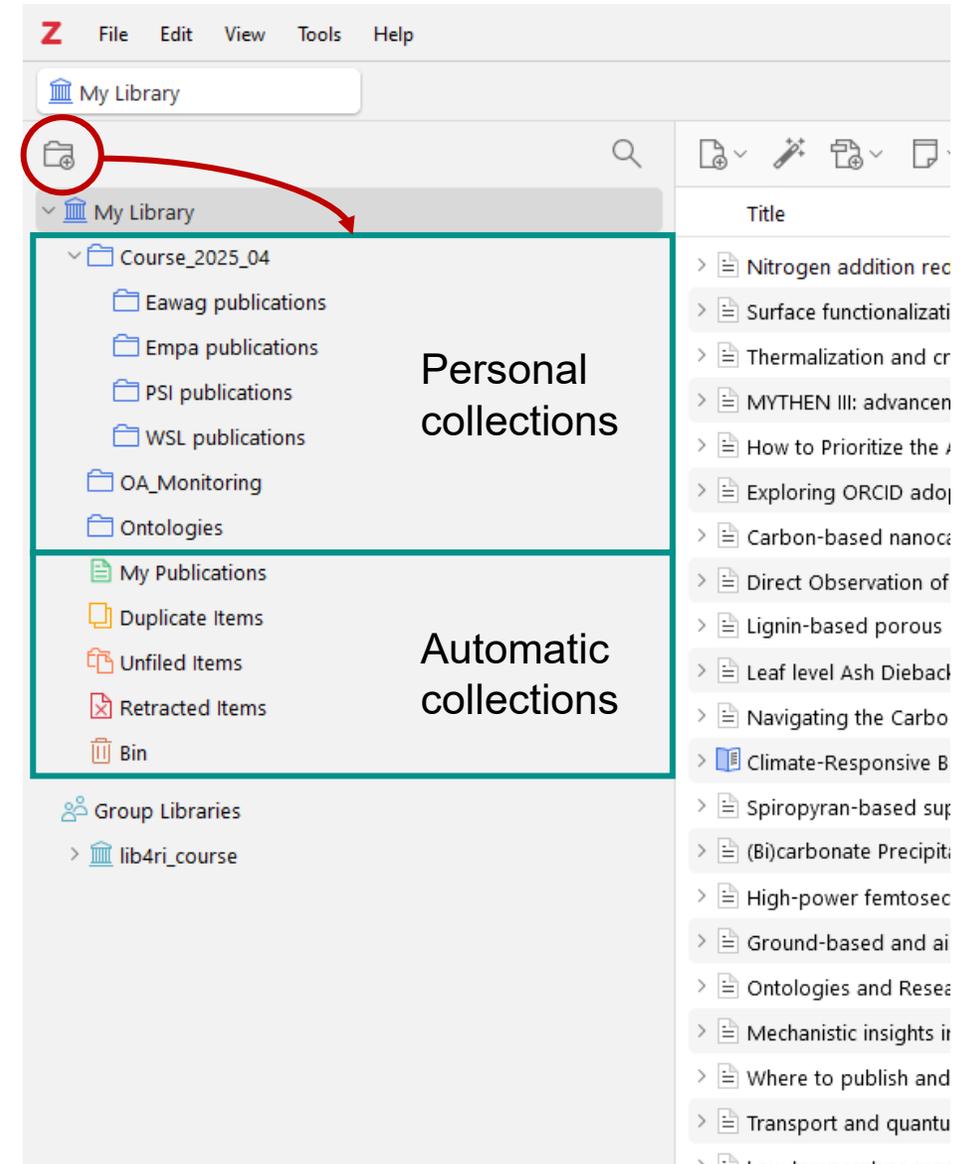
Importing to collections

- Default: My Library

- Manually assign items to collections with the dropdown menu

- Select a specific collection to automatically assign items
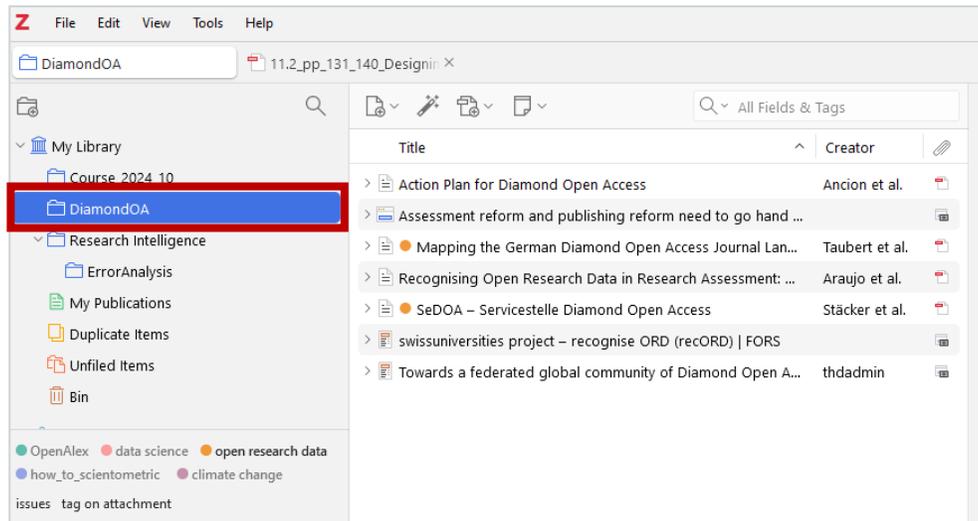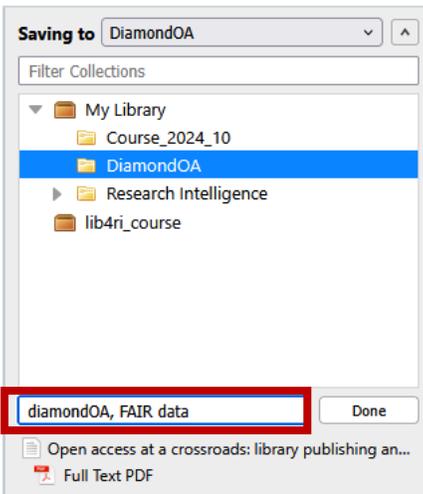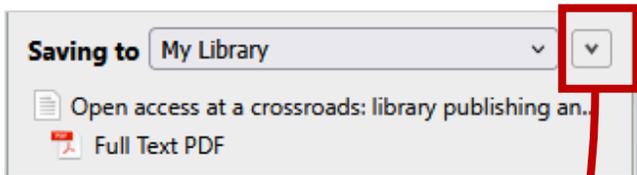
Hands-on: Bulk import from DORA

○ Create a collection "Zotero course"

○ Go to dora.lib4ri.ch and search for a topic of your choice

○ Import ten references after 2023 into the "Zotero course" collection

Example library:

Collections pane

Item panes

Tag selector

Fulltext is missing!

Library content

Retrieve missing full text

○ **Solution I:** Right-click for context menu -> Find available PDFs
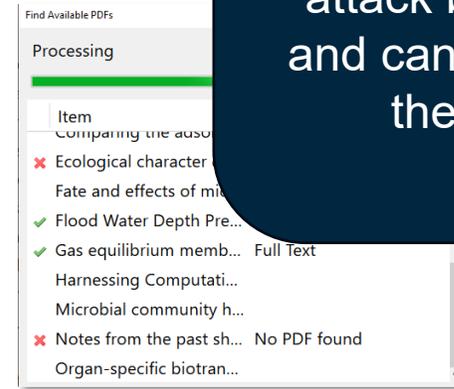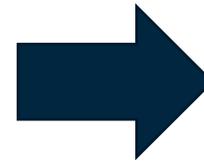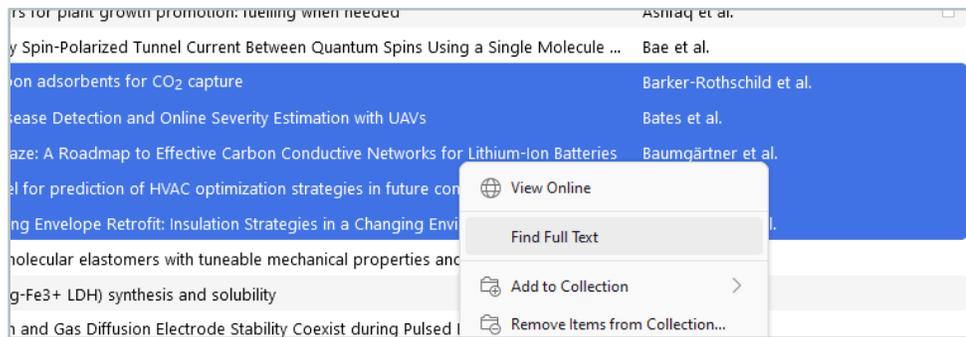
NEVER DO THIS FOR TOO MANY PAPERS AT ONCE! This may be considered as attack by the hosting server and can shut down access for the entire institution!

○ **Solution II:** Retrieve PDF from source and attach via drag & drop

○ **Solution III:** Change the URL in metadata to open repository (e.g. DORA)

○ **Tip:** No chance to retrieve the PDF?
Get in touch with the Lib4RI document delivery service!
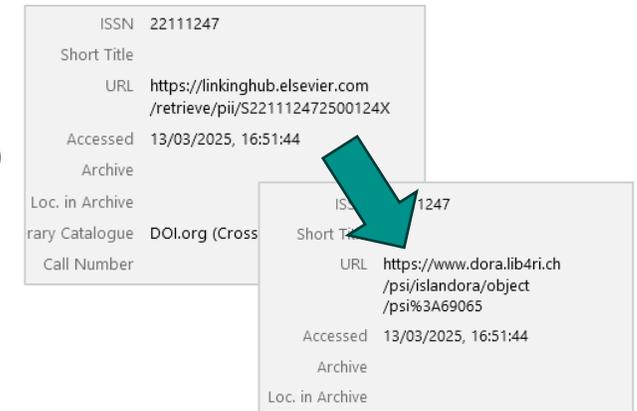
Finding items – Quick search

○ Default: Search all fields and tags

○ Refine or extend the quick search in the dropdown menu

Finding items – Advanced search

- ○ Can be refined, e.g. for papers lately added (date added in the last xx days)

- ○ Match all of the definitions or any (analogous to OR and AND)

- ○ Results of the advanced search can be saved and will appear like a regular collection

Hands-on:

- ○ Create a collection from advanced search based on three conditions of your choice
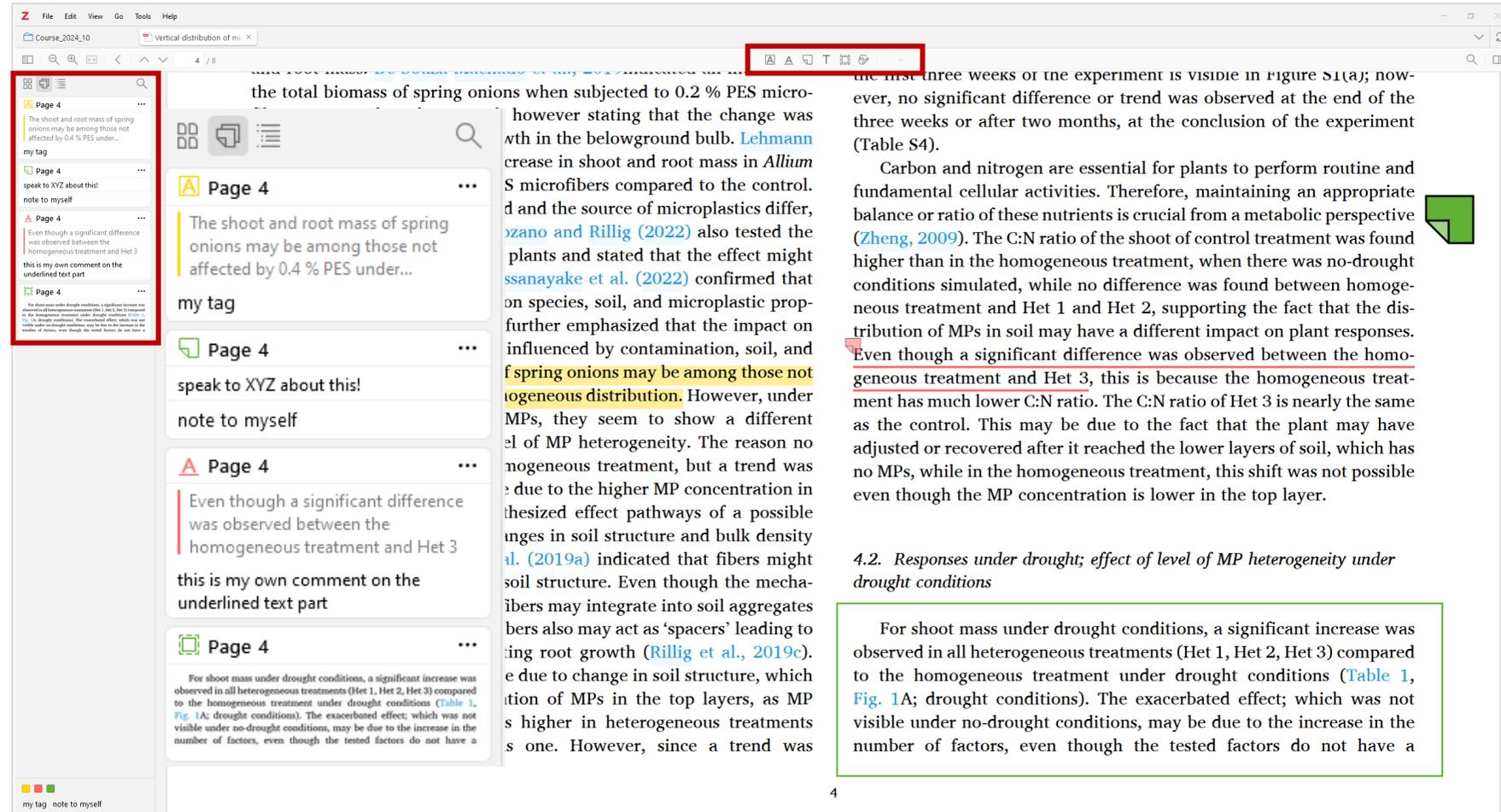
Finding items – Tags

○ Create individual tags that fit your personal workflow or categorization

○ Up to nine important tags can be assigned with a colour

○ Library can be filtered for tags

○ Tags are case sensitive!

○ **Solution I:** Uncheck "show automatic"

Finding items – Tags

- Create individual tags that fit your personal workflow or categorization

- Up to nine important tags can be assigned with a colour

- Library can be filtered for tags

- Tags are case sensitive!

- **Solution I:** Uncheck "show automatic"

- **Solution II:** Permanently disable auto-tagging: *Edit > Settings > General > Miscellaneous*
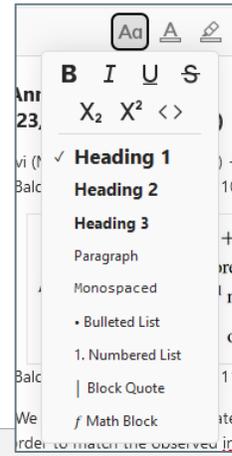
Lib4RI
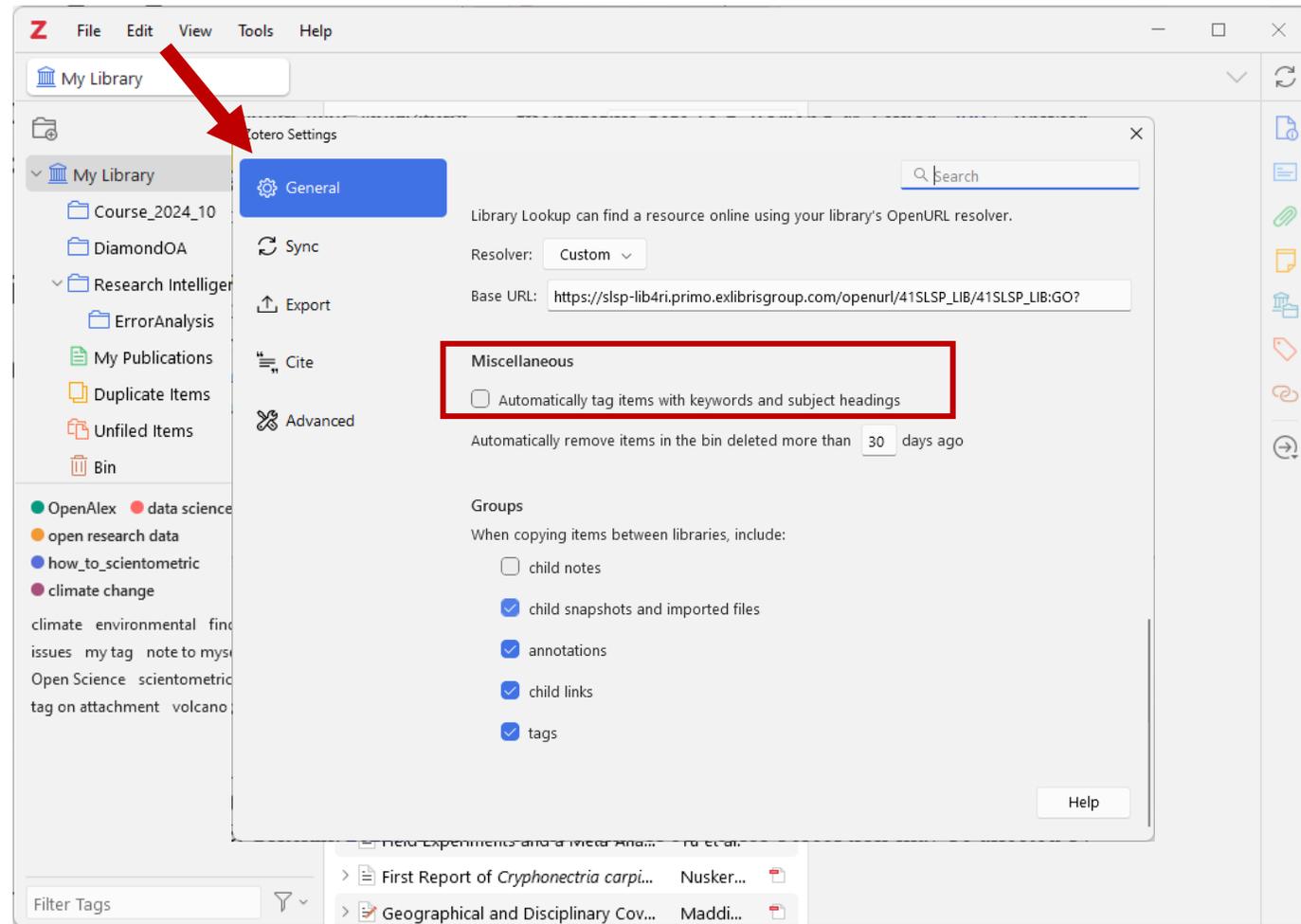
Step 3: Read, annotate, summarize

Document reader

- Works with most attachment types, incl. snapshots

- Document outline and search in text

- Cross-references (citations, tables, figures…)

- Mark sections to create annotations

- Tags and comments can be added to any annotation

Mark-down notes from annotations

○ All annotations can be collected into one item note

Mark-down notes from annotations

- ○ All annotations can be collected into one item note

- ○ Works across documents, i.e. selected items, collections or entire library

- ○ All notes have a reference and link to the exact position of the annotation

- ○ Use it in a separate window by clicking "…" to work in other documents in parallel

- ○ Drag and drop new annotations

- ○ Saves great amount of time (and nerves) to find important passages again
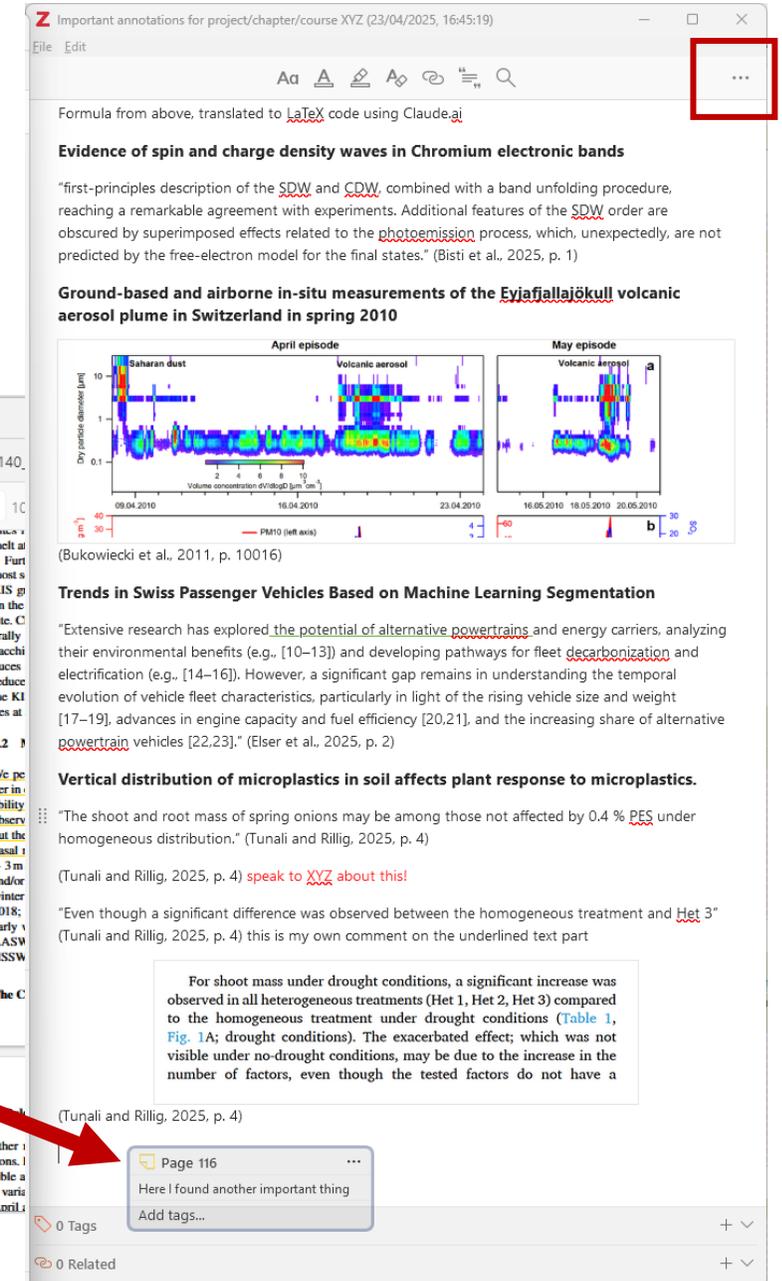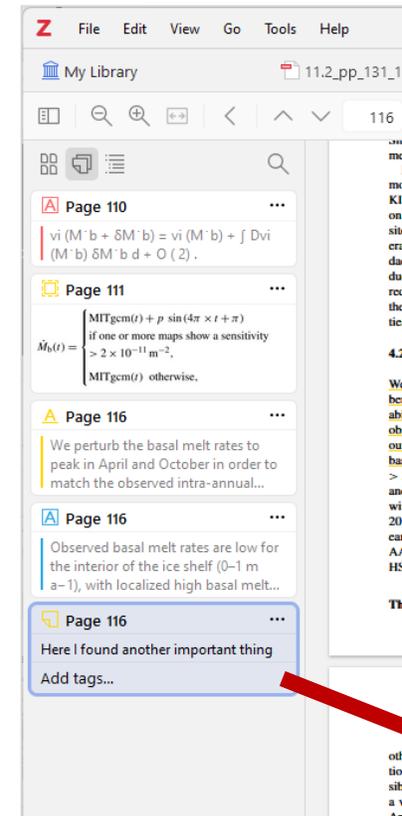
Hands-on: Create a summary on a topic of your choice

- In your course collection, add some annotations to two or more PDFs

- Select all items in the collection, and right-click to "**Create note from annotations**"

- Open the annotation file in a **separate window**

- Create a new annotation in any PDF and **add it via drag & drop**

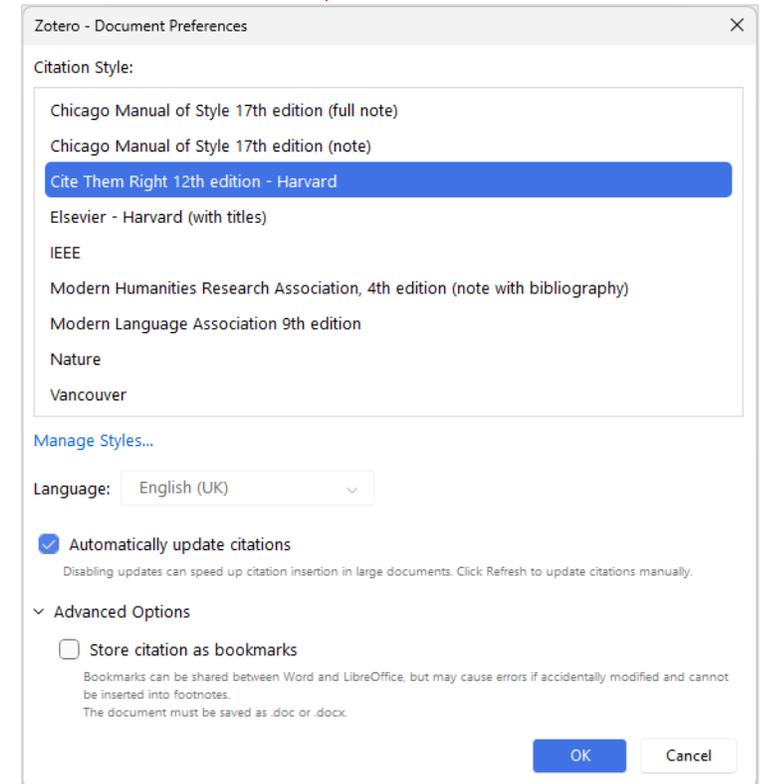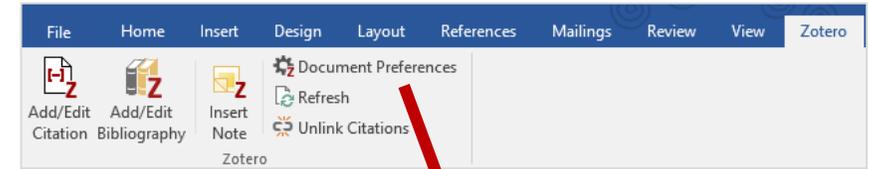- Time left? Play a bit with formatting!

Step 4: Cite-while-you-write

Hands-on: Cite-while-you-write

Task: Create a document with a few sentences of text*
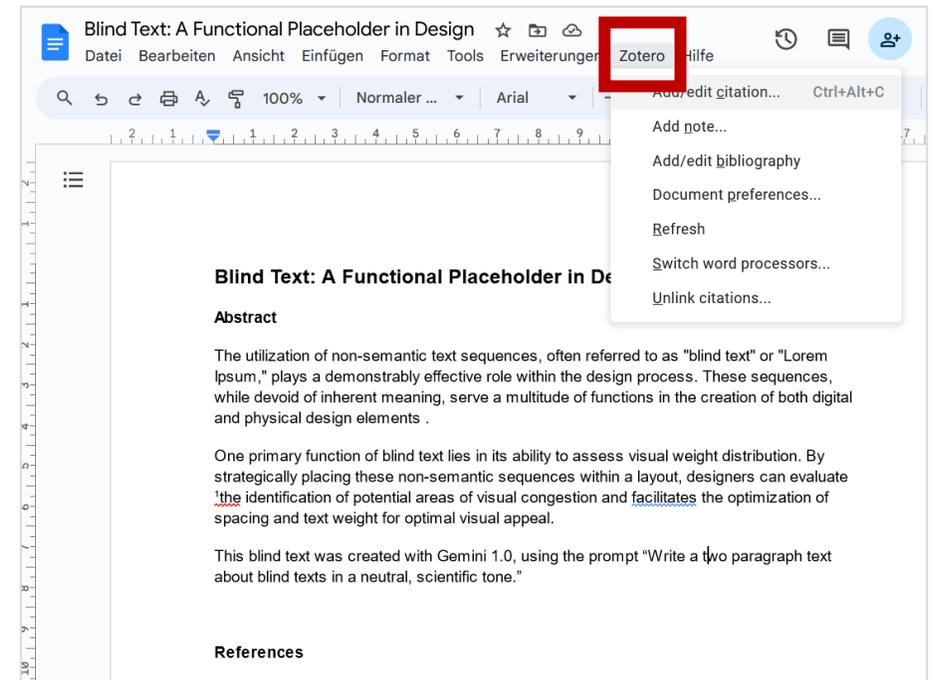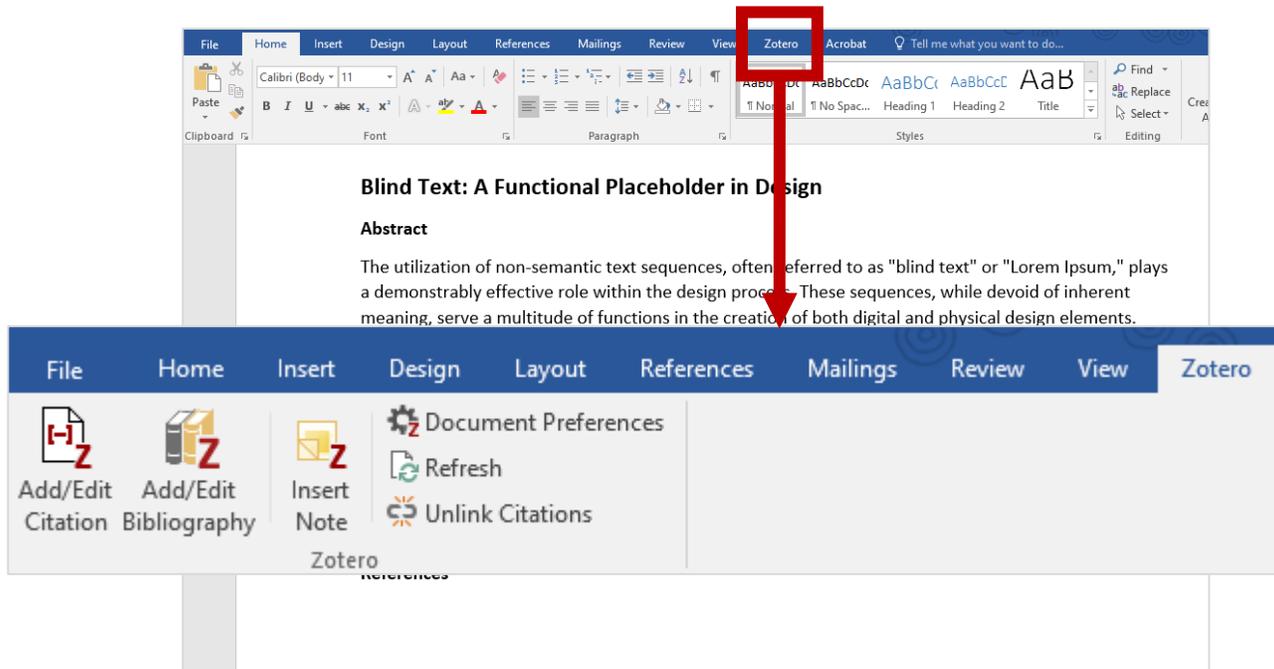
*Get blindtext e.g. from blindtextgenerator.org or generative LLMs

Document preferences

- Citation style is defined in the document preferences

- Styles can be changed according to your needs at any time

of various design elements. This objective assessment allows for the identification of potential areas of visual congestion and facilitates the optimization of spacing and text weight for optimal visual appeal.

This blind text was created with Gemini 1.0, using the prompt "Write a two paragraph text about blind texts in a neutral, scientific tone." [1].

References

1. Abel, V. & Bebel, W. Title of a Lorem Ipsum example reference. *J Blind Text Appr* **1**, (2035).

Nature

vs.

of various design elements. This objective assessment allows for the identification of potential areas of visual congestion and facilitates the optimization of spacing and text weight for optimal visual appeal.

This blind text was created with Gemini 1.0, using the prompt "Write a two paragraph text about blind texts in a neutral, scientific tone." (Abel and Bebel, 2035).
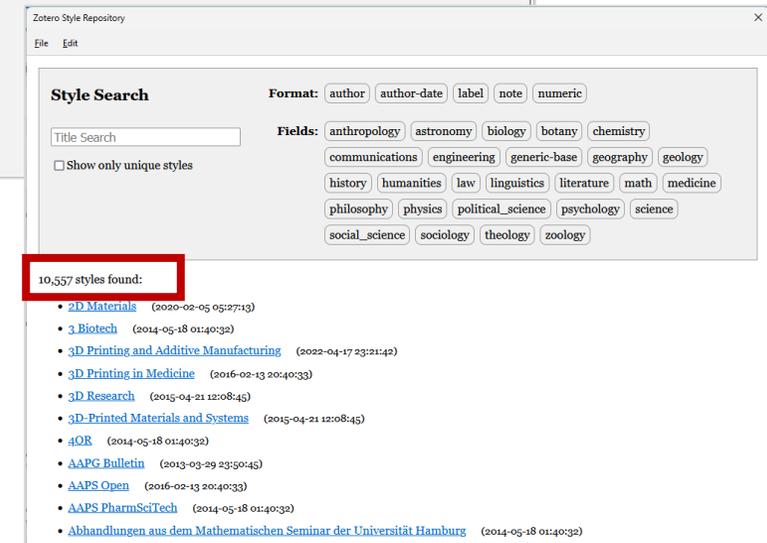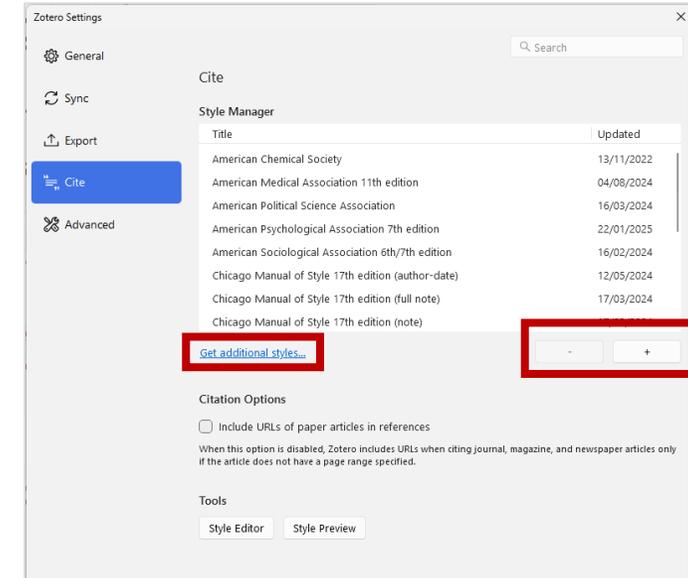
References

Abel, V., Bebel, W., 2035. Title of a Lorem Ipsum example reference. J Blind Text Appr 1.
https://doi.org/10.1093/XXXX

Elsevier - Harvard

Zotero - Document Preferences

Citation Style:

Chicago Manual of Style 17th edition (full note)

Chicago Manual of Style 17th edition (note)

Cite Them Right 12th edition - Harvard

Elsevier - Harvard (with titles)

IEEE

Modern Humanities Research Association, 4th edition (note with bibliography)

Modern Language Association 9th edition

Nature

Vancouver

Manage Styles...

Language: English (UK)

☑ Automatically update citations

Disabling updates can speed up citation insertion in large documents. Click Refresh to update citations manually.

∨ Advanced Options

☐ Store citation as bookmarks

Bookmarks can be shared between Word and LibreOffice, but may cause errors if accidentally modified and cannot be inserted into footnotes.
The document must be saved as .doc or .docx.

OK   Cancel

Manage citation styles

○ Customise your style list: *Edit > Settings > Cite*

○ More styles are available in the repository

Manage citation styles

○ Customise your style list: *Edit > Settings > Cite*

○ More styles are available in the repository

○ **Always cross-check if the style you choose fits the journal's current demands!**

○ Styles might be outdated, especially for very small journals

○ You can adapt a style if necessary in the style editor (XML knowledge required)

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Unlinking citations

○ Unlink citations to submit a flat file without field code

○ **Caution!** Unlinking cannot be reversed* and there is no auto-update anymore!

○ Zotero recommends to unlink citations only in a copy of your work file:
final_draft_reviewed_lastchanges_V7b.docx -> *publicationtitle_ready_for_submission.docx*
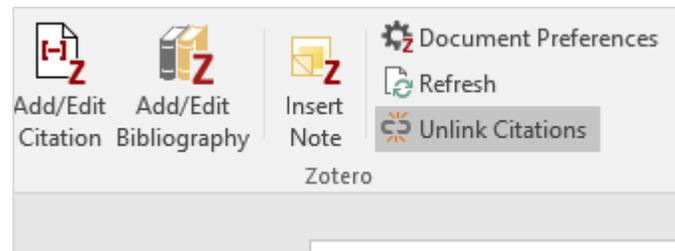
*Clicked by accident and ignored the warning? Unless the document was closed and re-opened, Crtl+Z (Win/Linux) or Cmd+Z (Mac) will help.

Hands-on: Adding references

Task: Add and edit references

○ Add some random citations in your document

○ Add the bibliography at the end of your document

○ Edit some citations by placing your cursor into the citation and click Add/Edit Citation:

  ○ Add another reference into a citation

  ○ Change a citation from parenthetical to narrative:
  (Author, Year) -> Author (Year)

    ○ Click the reference in the format window

    ○ Check «omit author» and write their name by hand

  ○ Add the prefix "but see"

○ Unlink all citations in the end

Beyond Word: PowerPoint

○ Zotero does not work in PowerPoint (yet)

○ **Workaround:** Create a bibliography from selected items

  ○ Either select the entries directly or copy them to a sub-collection (e.g. talk@conference_year)

○ Paste from clipboard into your presentation

○ In-text citation is not possible -> reference list is not automatically updated!
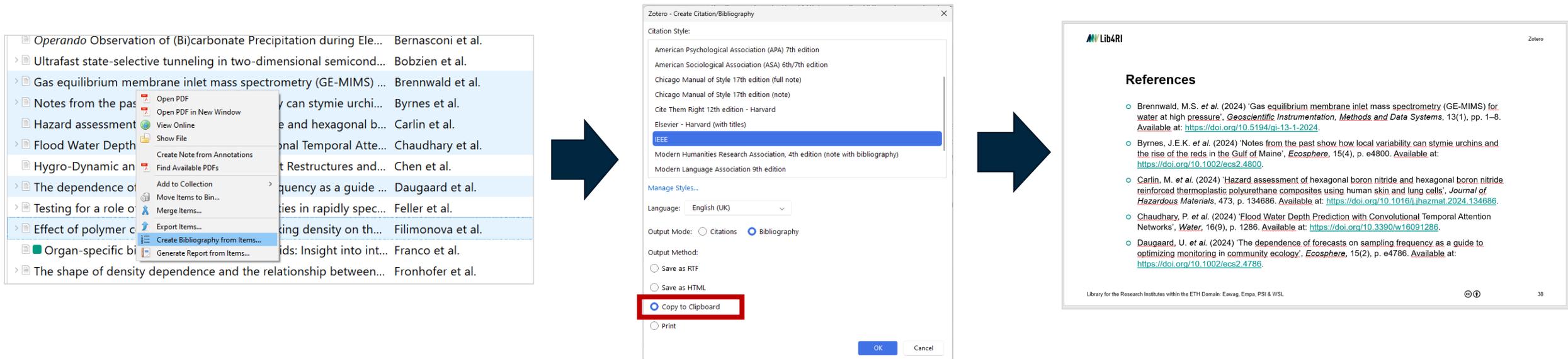
Beyond Word: LaTeX

○ Export your library, collection or selected references as *.bib and add it to your TeX workspace

○ Make sure the file name has no whitespaces!

Text snippet based on Overleaf's "Example Project"

Beyond Word: Quarto

Beyond a paper: When multiple bibliographies are needed

○ Zotero cannot handle two bibliographies in one Word document

○ **Solution I:** Write each chapter into a separate file

   ○ Unlink citations before joining the individual files or join PDF versions only

○ **"Solution" II:** Add citations like normal, but paste the bibliography from the clipboard

   ○ Keep in mind the bibliography will not be auto-updated then!

   ○ Make sure to include all citation you used, e.g. through marking with tags or subcollections

○ **Solution III:** Use LaTeX with according packages (training available at Lib4RI)

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Step 5: Sync and collaborate

The web library

○ Free account required to use the web library

○ Online mirror of your local library

○ **Caution!** File **sync on the Zotero server** is restricted to max. 300 MB with a free account

   ○ **Disable** full-text sync and file sync in *Settings > Sync*

   ○ Tags and item notes are synced

Alternatives:

○ Upgrade your Zotero storage (20-120$/yr)

○ Choose your own cloud over Zotero server to sync your personal library

   ○ Not recommended by Zotero, risk of corrupted databases

   ○ Read more at zotero.org/support/sync
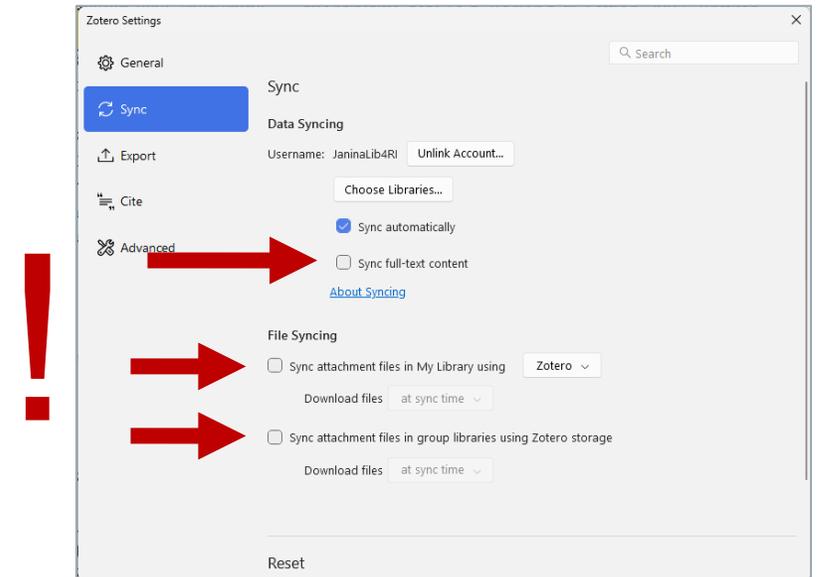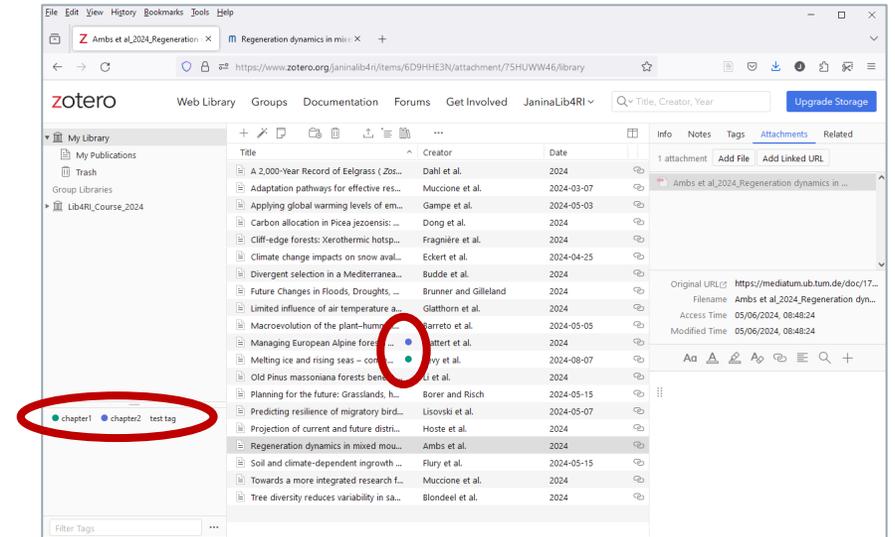
Working with colleagues

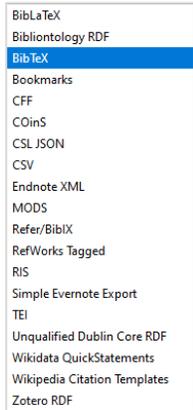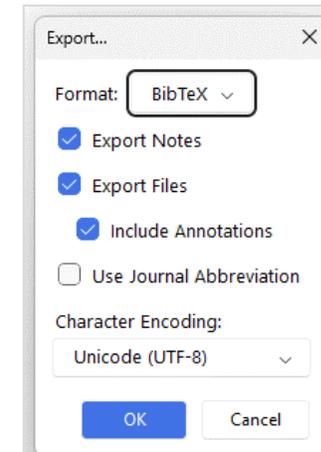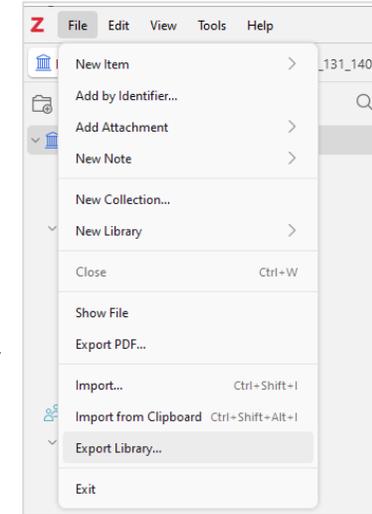## Sharing a library

○ Local libraries can be shared as file via *File > Export library*

  ○ Best test results *.bib and *.ris

○ Create group libraries to work together in one library

Working together in one file

○ Using the same local library is not required

○ To add or edit references, Zotero must be used

○ Using different literature managers can cause problems!

  ➢ Check with your co-authors, which software to use

  ➢ Work-around: Insert plain text citations as comment
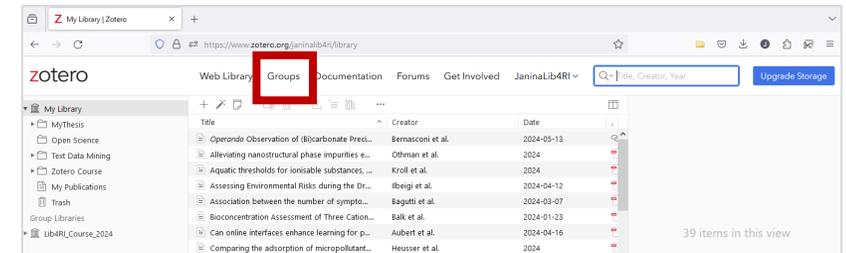
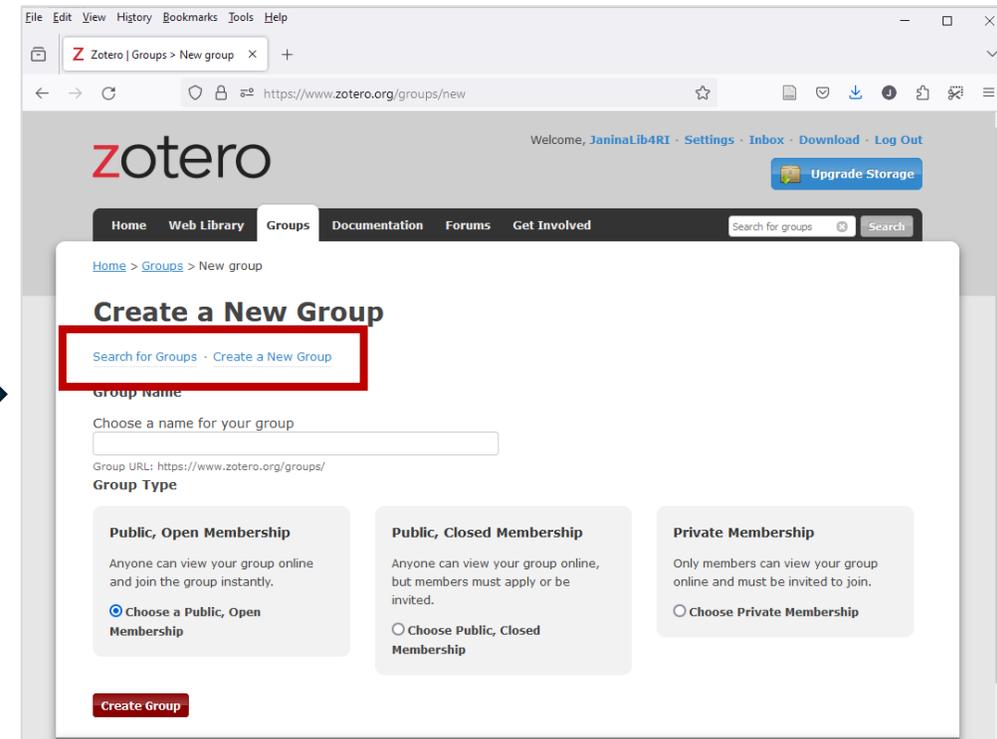# Group libraries

○ Web library is only for your personal use

○ Group libraries can be shared with others

○ Public groups are visible for everybody

○ Note: Group names cannot contain the word "Zotero"
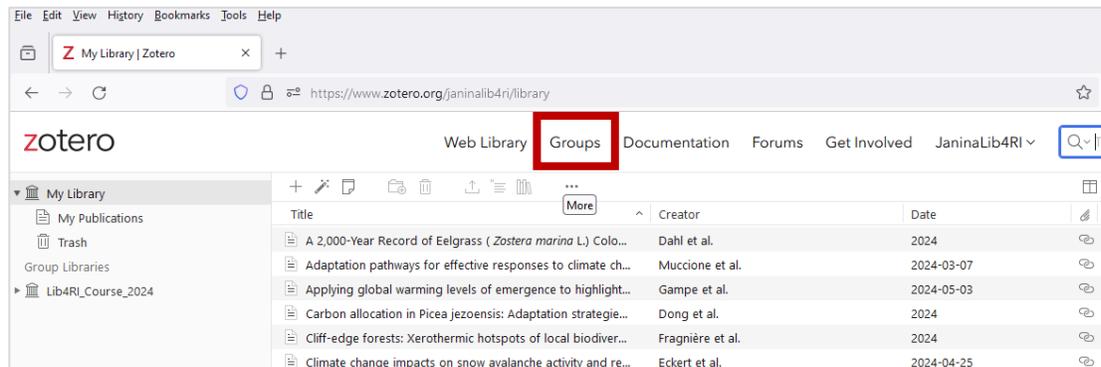
Hands-on: Group libraries

○ Registration required at Zotero.org

○ If you do not want to register, skip this hands-on

○ Find and join the group *lib4ri_course*

○ Drop one item into the group

○ Import the items from the group library into your local collection *Zotero course*

○ Retrieve PDFs for the new items

○ **Bonus:** Check if there are public groups on your topic of interest!

Questions left?