

Spring 2024

Literature management with Zotero

Janina Radny

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



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

Course Evaluation
 Lib4RI Training Series: Searching & Managing Scientific Information
 Module 4b: Literature Management with Zotero
 Organisation: Eawag Empa PSI WSL
 Session date: _____

Please rate the following statements...

	strongly agree	agree	neutral	disagree	strongly disagree
1 Content	5	4	3	2	1
a) Overall, the course fully met my expectations	<input type="checkbox"/>				
b) The knowledge provided is useful for my work	<input type="checkbox"/>				
c) The level of difficulty and the comprehensibility of the presentation was appropriate	<input type="checkbox"/>				
d) There was a good balance between the course length and subject matter	<input type="checkbox"/>				
e) Examples shown during the live session were appropriate	<input type="checkbox"/>				

2 Which topics could be shortened or excluded?

3 Which topics were missing or should have been presented in more detail?

Please rate the following statements...

	strongly agree	agree	neutral	disagree	strongly disagree
4 Presentation and Organisation	5	4	3	2	1
a) The course was well structured and had a clear theme	<input type="checkbox"/>				
b) The group size was appropriate	<input type="checkbox"/>				
c) The documents distributed are useful	<input type="checkbox"/>				
d) The duration of the course and use of time were appropriate	<input type="checkbox"/>				
e) The course announcement and the information given were clear and correct	<input type="checkbox"/>				

5 What did you like most?

6 What could be improved?

Forms of quality?

	Content					Presentation				
	5 very good	4 good	3 sufficient	2 insufficient	1 unsatisfactory	5 very good	4 good	3 sufficient	2 insufficient	1 unsatisfactory
_____	<input type="checkbox"/>									
_____	<input type="checkbox"/>									

future courses:

E-Mail announcement
 Other: _____

f) with no distribution at the course

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

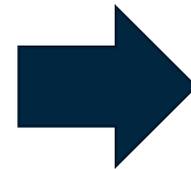
Preparing your first publication(s)

Almost completed



Collecting information

Put your research in context



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

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

Literature management software helps to:

Organize

- Gather and import information
- Read, mark and annotate
- Group and connect resources

Cite

- Compile a consistent bibliography
- Adapt citations to the journal style

Collaborate

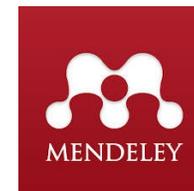
- Share references with your co-authors

Open source



JabRef

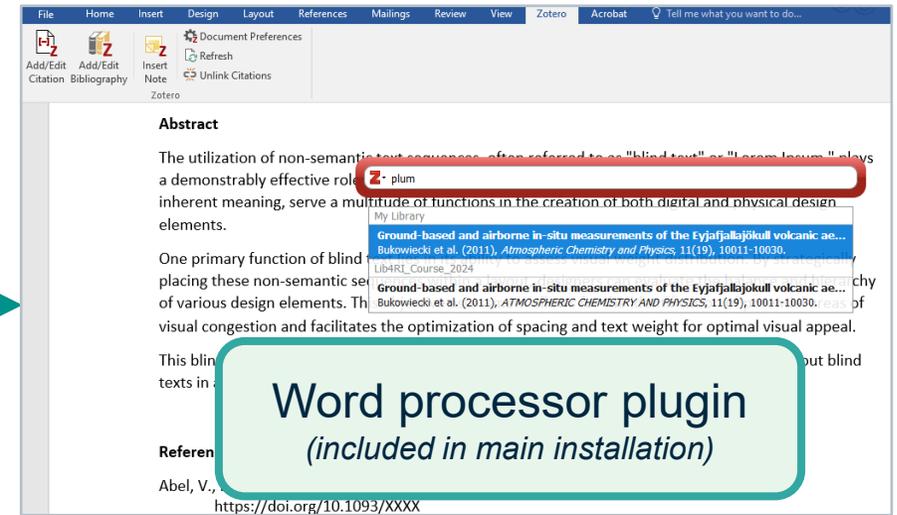
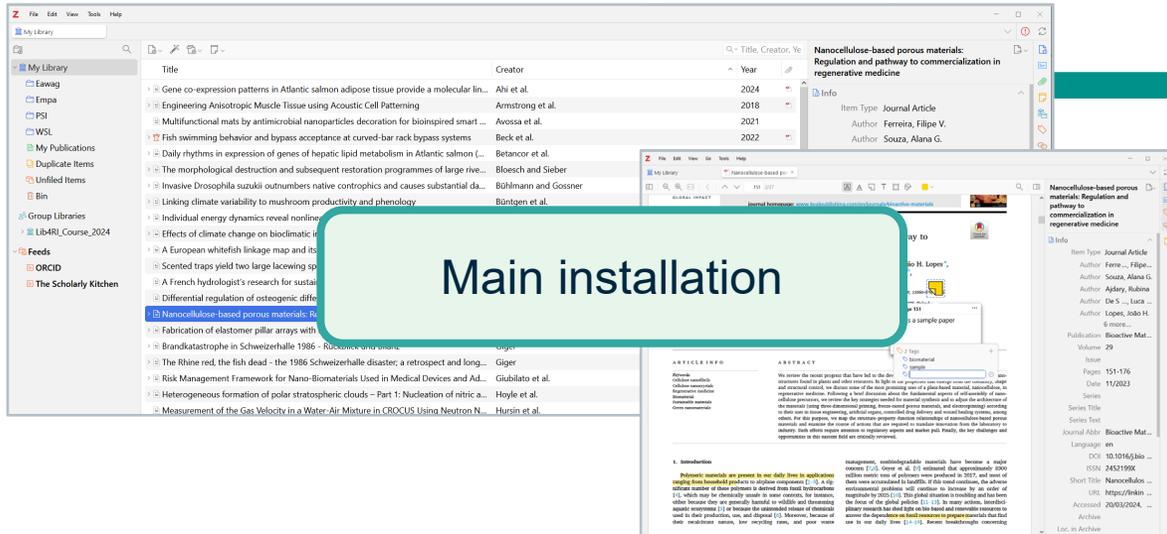
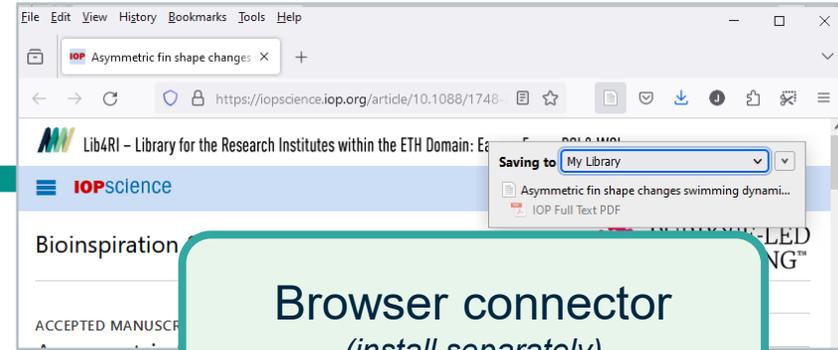
Commercial



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



System requirements

Main installation

- Windows 7 or later, macOS 10.11 or later, Linux
- *Not tested: iOS, Android (Beta Version)*

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)*

Used for this lecture:

- Zotero 7
- Firefox 135
- MS Office 365

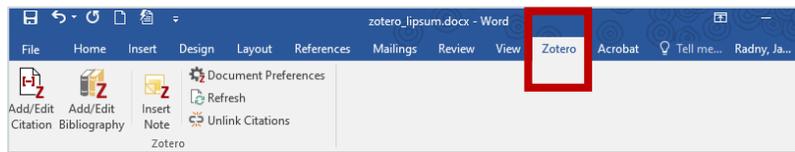
Check your installation

You should see:

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



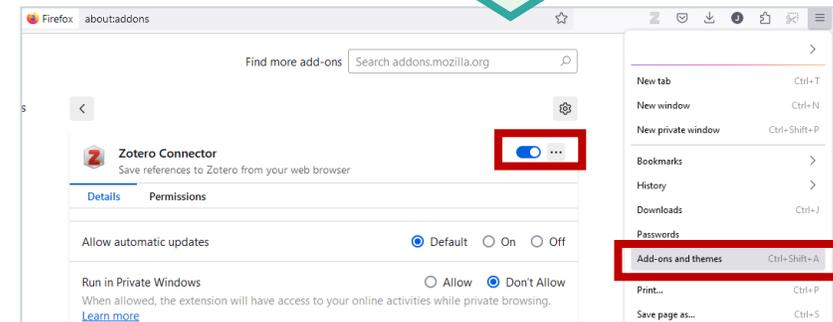
- Zotero tab in you text editor



- Symbol in your browser (varies with item type)



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



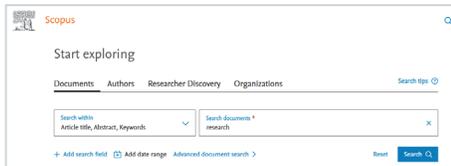
Hands-on literature management

Five step for literature management

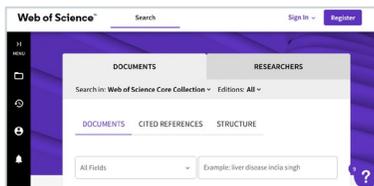
- **Step 1:** Get literature into Zotero
- **Step 2:** Organize your library
- **Step 3:** Read, annotate, summarize
- **Step 4:** Cite-while-you-write
- **Step 5:** Sync and collaborate

Step 1: Get literature

Finding literature



scopus.com



webofscience.com



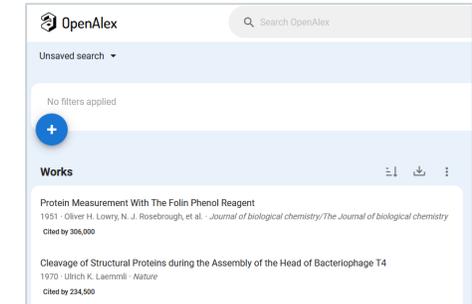
scholar.google.com

lib4ri.ch

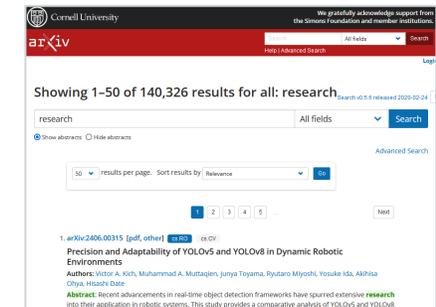
dora.lib4ri.ch

More info? Check out our resources!

- Training: [Searching Scientific Information](#)
- Info sheet: [Topic Search](#)
- Website: [Systematic literature search](#)



openalex.org



arxiv.org/ (pre-prints)

Import via browser connector



Item => Unique entry in your library

Attachments, e.g. PDF, note...

Metadata and additional information

Item Type	Journal Article
Title	Ground-based and airborne in-situ measurements of the Eyjafjallajokull volcanic aerosol plume in Switzerland in spring 2010
Author	Bukowiecki, N.
Author	Zieger, P.
Author	Weingartner, E.
Author	Juranyi, Z.
Author	Gysel, M.

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
 -

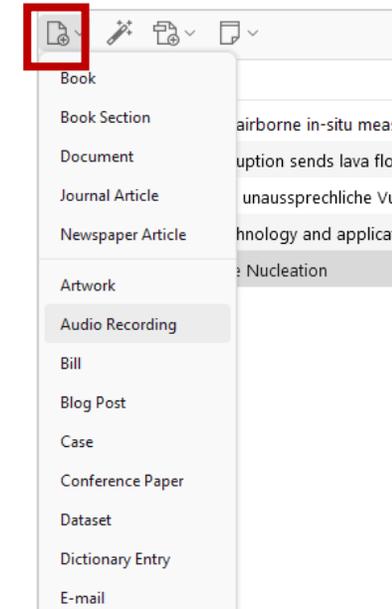
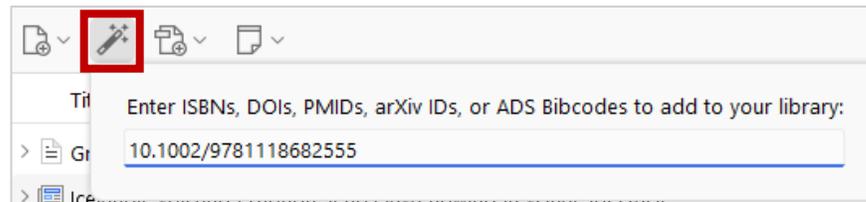
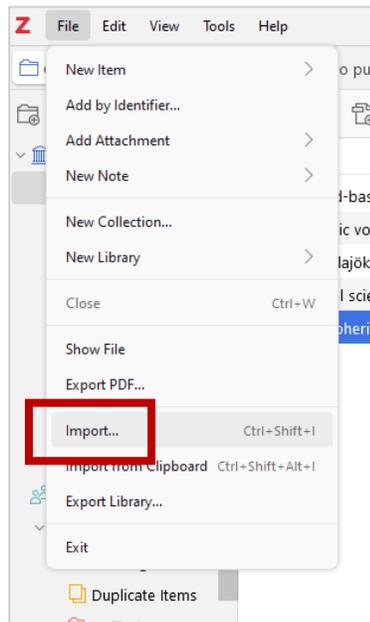
Title	Creator	
> Ground-based and airborne in-situ measurements of the Eyjafjallajökull vol...	Bukowiecki et al.	
> Icelandic volcano eruption sends lava flowing in visual spectacle	McDaniel	
> Eyjafjallajökull – Der unaussprechliche Vulkanfilm		
> Aerosol science: technology and applications	Colbeck	
> Atmospheric Particle Nucleation	Sipilä et al.	

Atmospheric Particle Nucleation	
Item Type	Book Section
Title	Atmospheric Particle Nucleation
Author	Sipilä, Mikko
Author	Lehtipalo, Katrianne
Author	Kulmala, Markku
Book Title	Aerosol Science

Item Type	Book Section
Title	Artwork
	Audio Recording
	Bill
Editor	Blog Post
	Book
Editor	Book Section
Author	Case
	Conference Paper
Abstract	Dataset
Book Title	Dictionary Entry
	Document
Series	E-mail
	Encyclopedia Article
Series Number	Film
Volume	Forum Post
	Hearing
# of Volumes	Instant Message
	Interview
Edition	Journal Article
Place	Letter
Publisher	Magazine Article
	Manuscript
Date	Map
Pages	Newspaper Article
Language	Patent
	Podcast
ISBN	Preprint
	Presentation
	Radio Broadcast
	Report
Short Title	Software
URL	Standard
Accessed	Statute
Archive	Thesis
	TV Broadcast
Loc. in Archive	Video Recording
	Web Page

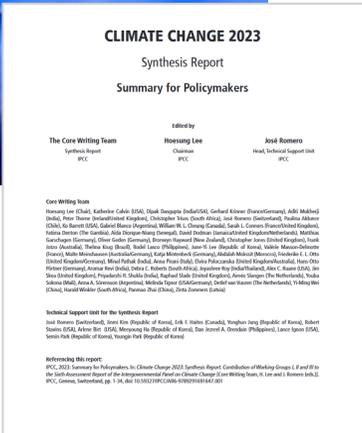
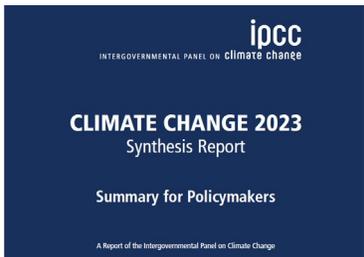
Other import options I

- *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



IPCC, 2023: Climate Change 2023: Synthesis Report. Contribution of Working Groups I, II and III to the Sixth Assessment Report of the Intergovernmental Panel on Climate Change [Core Writing Team, H. Lee and J. Romero (eds.)]. IPCC, Geneva, Switzerland.

Info

Item Type Report

Title IPCC, 2023: Climate Change 2023: Synthesis Report. Contribution of Working Groups I, II and III to the Sixth Assessment Report of the Intergovernmental Panel on Climate Change [Core Writing Team, H. Lee and J. Romero (eds.)]. IPCC, Geneva, Switzerland.

Contributor Lee, Hoesung

Author Calvin, Katherine

Author Dasgupta, Dipak

Author Krinner, Gerhard

Author Mukherji, Aditi

119 more...

Report Number

Report Type

Series Title

Place

Institution Intergovernmental Panel on Climate Change (IPCC)

Date 2023-07-25

Pages

Language en

Short Title IPCC, 2023

URL <https://www.ipcc.ch/report/ar6/syr/>

Accessed 31/03/2025, 14:32:06

Archive

Loc. in Archive

Library Catalogue DOI.org (Crossref)

Call Number

Rights

Extra Edition: First
DOI: 10.59327/IPCC/AR6-9789291691647



Biodiversität und ökologischer Ausgleich auf Flugplätzen

Info

Item Type Journal Article

Title Biodiversität und ökologischer Ausgleich auf Flugplätzen

Author (last), (first)

Publication

Volume

Issue

Pages

Date 2019

Series

Series Title

Series Text

Journal Abbr

Language de

DOI

ISSN

Short Title

URL

Accessed

Archive

Loc. in Archive

Library Catalogue Zotero

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](https://doi.org/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

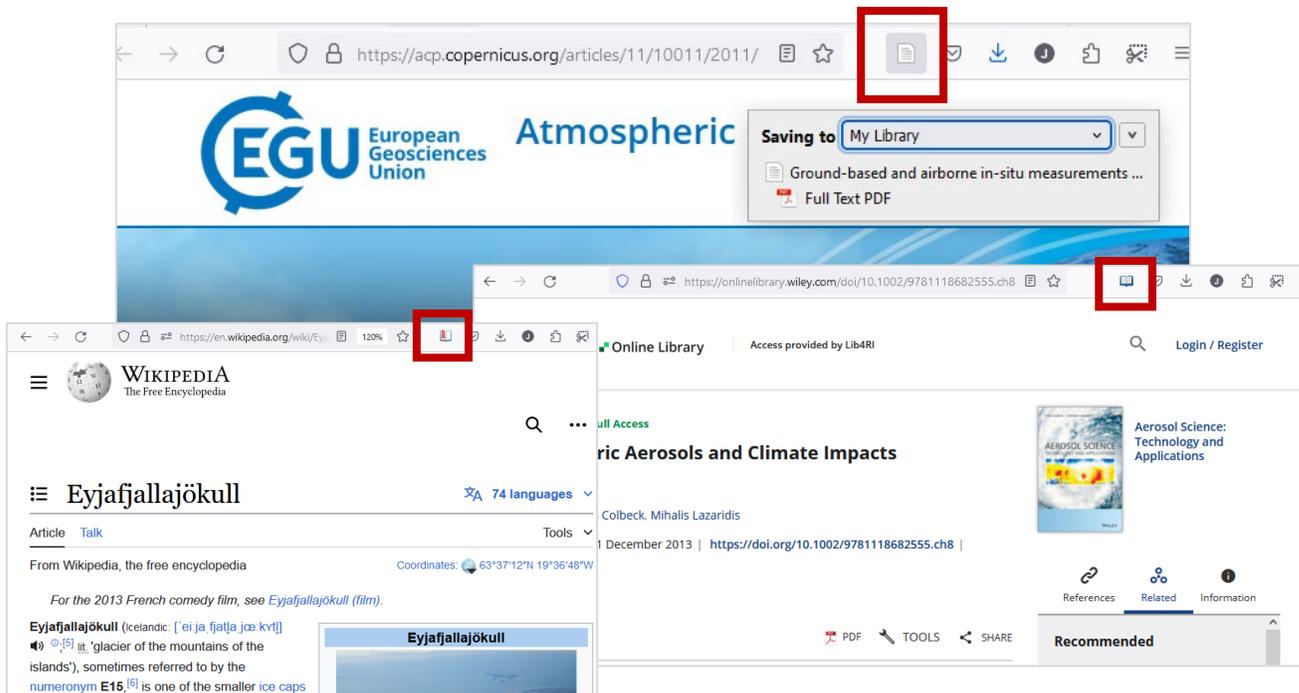
Keep in mind:

- 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

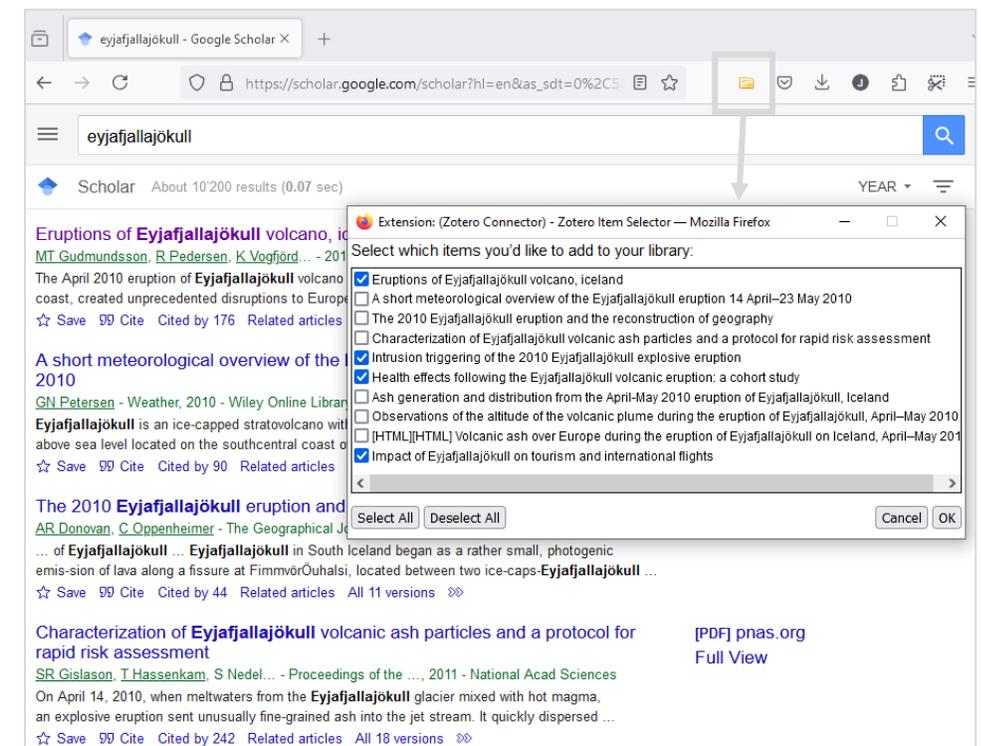
Single import

- Only one item with metadata is available
- Various item types with different metadata entries



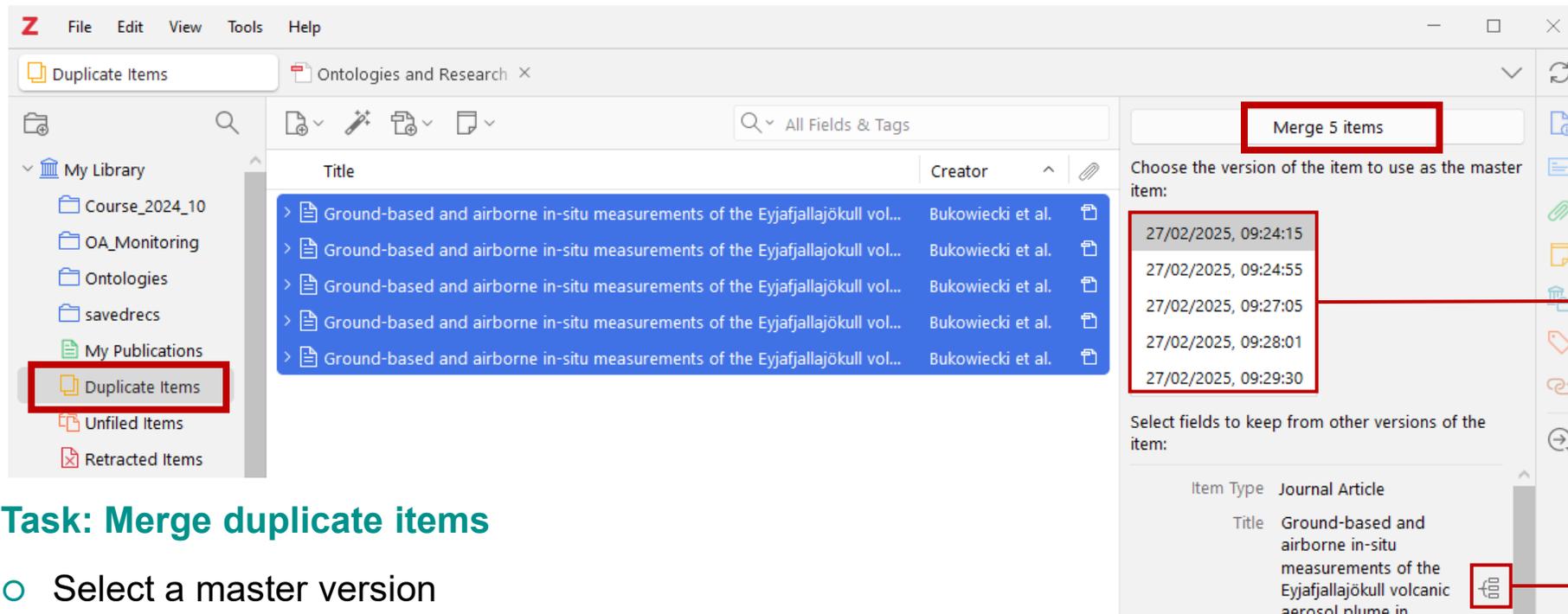
Bulk import

- 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:

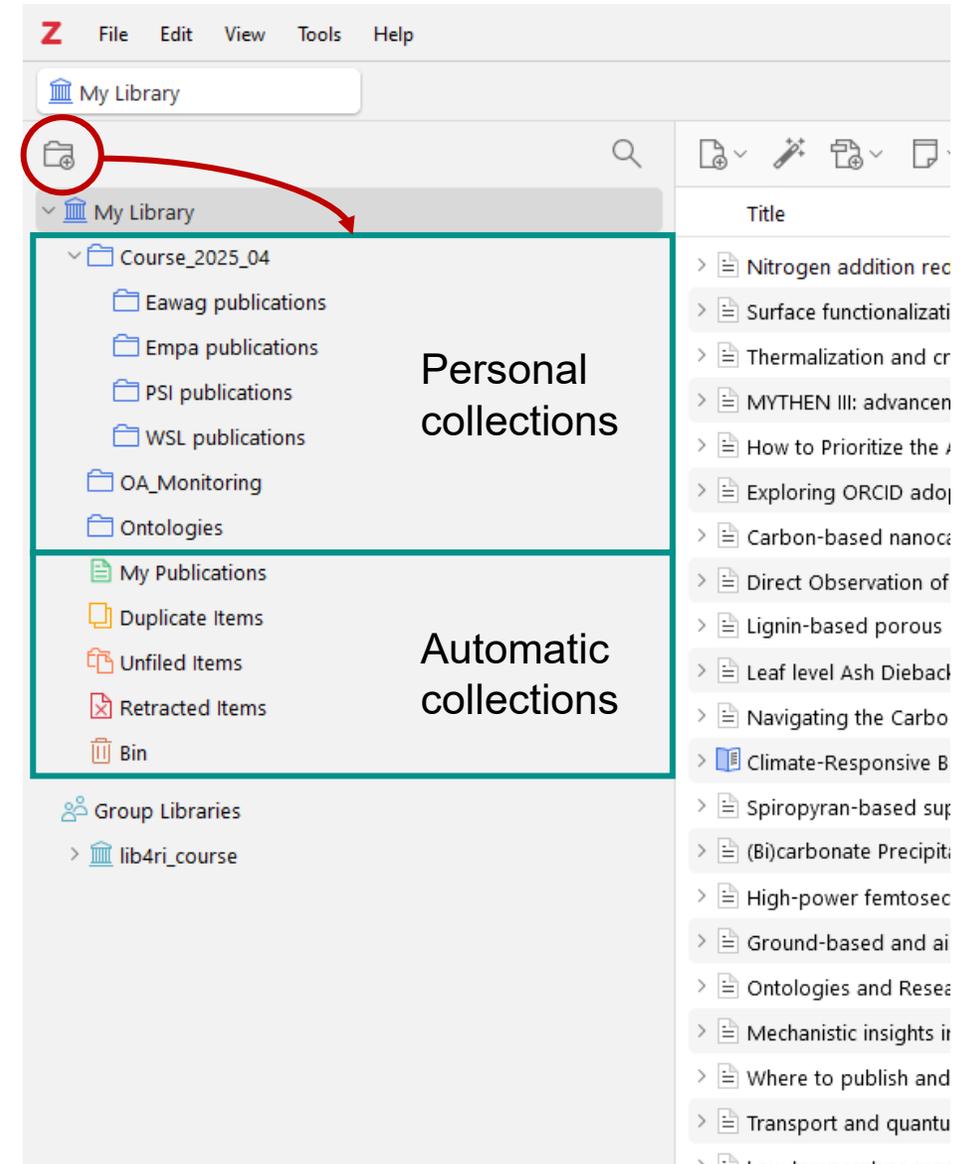
- Sometimes items are not recognized as duplicates (e.g. typos)
- Select items to be merged and right-click to enforce merging
- All items of the same type can be merged, e.g. journal article with journal article, but not book section

Attachments remain after merging:

- Keywords and tags
- Notes
- In-text annotations are merged across PDFs

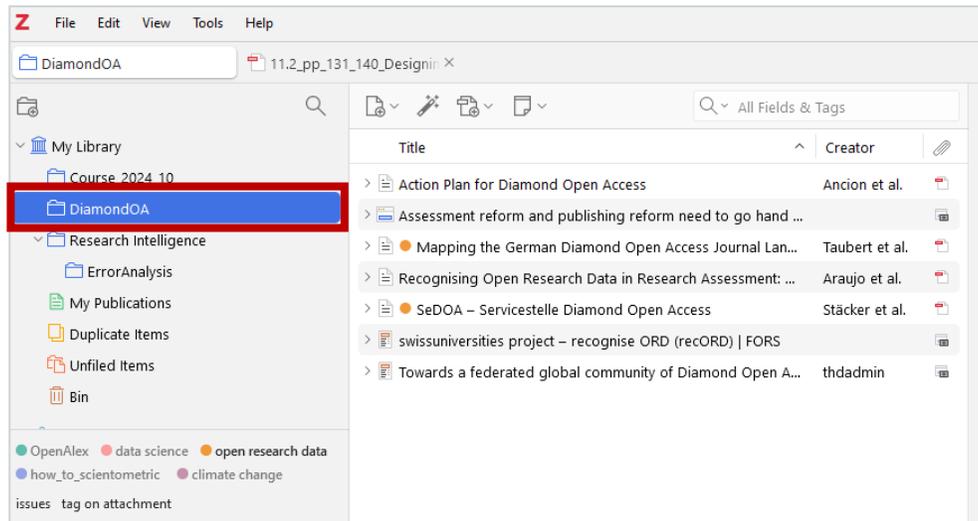
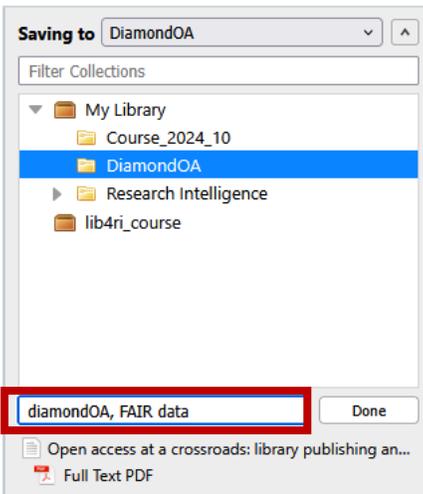
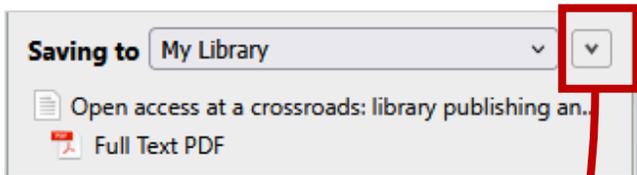
Organizing your library

- 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)



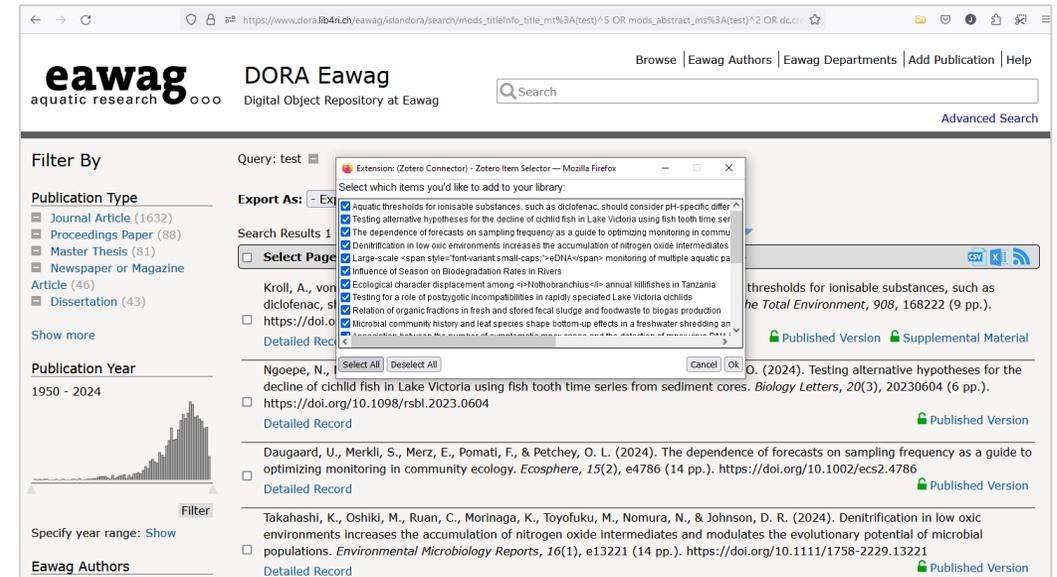
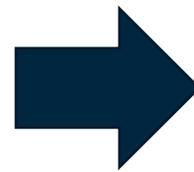
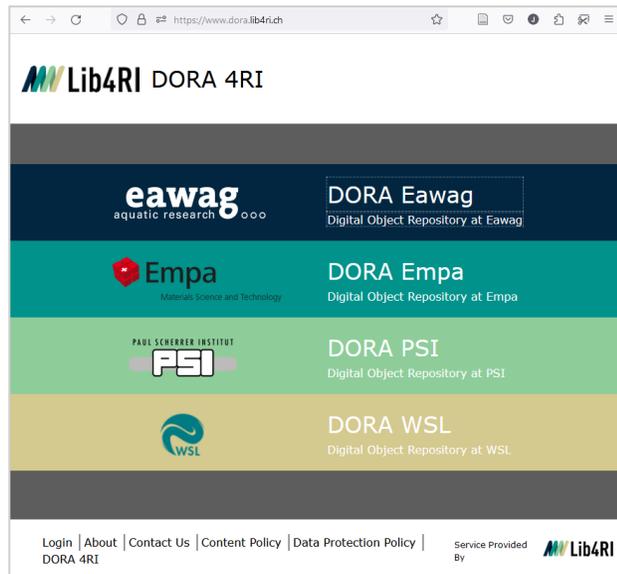
Importing to collections

- 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:

The screenshot displays the Zotero desktop application. On the left is the 'Collections pane' showing a tree view of folders like 'Course_2024_10'. The main area is the 'Library content' pane, which lists items with columns for 'Title' and 'Creator'. One item, 'Carbon-based nanocarriers for plant growth promotion: fuelling when needed' by Ashfaq et al., is selected and highlighted in blue. A red box highlights the 'Fulltext is missing!' status for this item. On the right is the 'Item panes' section, which shows detailed metadata for the selected item, including 'Item Type: Journal Article', 'Author: Ashfaq, Mohammad', 'Publication: Nanoscale', and 'Date: 2025'. At the bottom left, a 'Tag selector' pane shows various tags like 'comment', 'appendix', and 'raw data'.

Collections pane

Fulltext is missing!

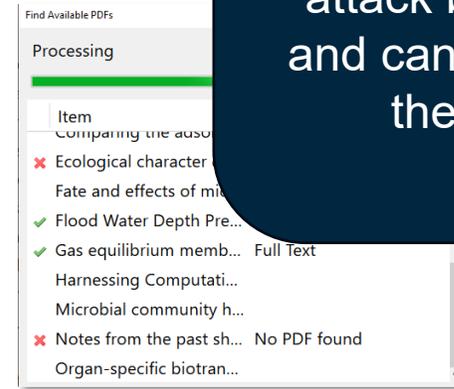
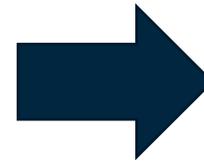
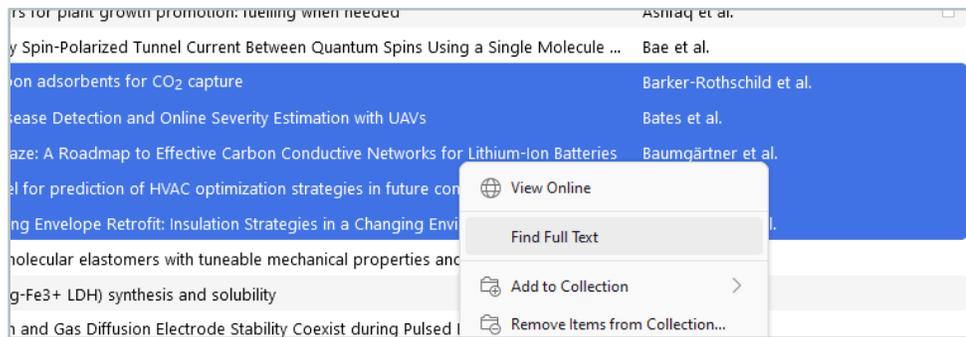
Tag selector

Library content

Item panes

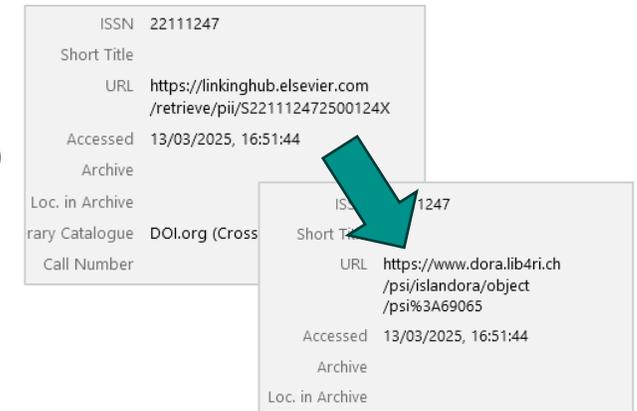
Retrieve missing full text

- **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

The screenshot shows the Zotero application window with a search bar containing 'co2'. A dropdown menu is open over the search bar, showing the following options:

- Title, Creator, Year
- All Fields & Tags
- Everything
- Advanced Search

The main window displays a list of search results for 'co2'. The results are as follows:

Title	Creator	Actions
A comparative analysis of ecosystem service values from various rice farming systems: A field ex...	Ye	
ANALYSIS OF LANDSCAPE PATTERN CHANGE AND ECOSYSTEM SERVICE VALUE OF URBAN GREE...	Wa	
Assessment of Ecosystem Service Values of Urban Parks in Improving Air Quality: A Case Study of...	Xie	
(Bi)carbonate Precipitation and Gas Diffusion Electrode Stability Coexist during Pulsed Electroche...	Bernasconi et al.	Full Text PDF
CO ₂ Flux and C Balance due to the Replacement of Bare Soil with Agro-Ecological Service Crops i...	Radicetti et al.	
Ecosystem service value analysis of CO ₂ management based on land use change of Zoige alpine ...	Quan et al.	
Empirical Assessment on Ecosystem Service Functions of Urban Green Spaces in Tai Lake Basin	Peng and Yang	
Identification of Priority Implementation Areas and Configuration Types for Green Infrastructure B...	Wang et al.	
Integrate carbon dynamics models for assessing the impact of land use intervention on carbon s...	Liu et al.	
Lignin-based porous carbon adsorbents for CO ₂ capture	Barker-Rothschild et al.	Full Text PDF
Mechanistic insights into the formation of hydroxides with unconventional coordination environm...	Chen et al.	Full Text PDF
Navigating the Carbon Maze: A Roadmap to Effective Carbon Conductive Networks for Lithium-Io...	Baumgärtner et al.	Full Text PDF

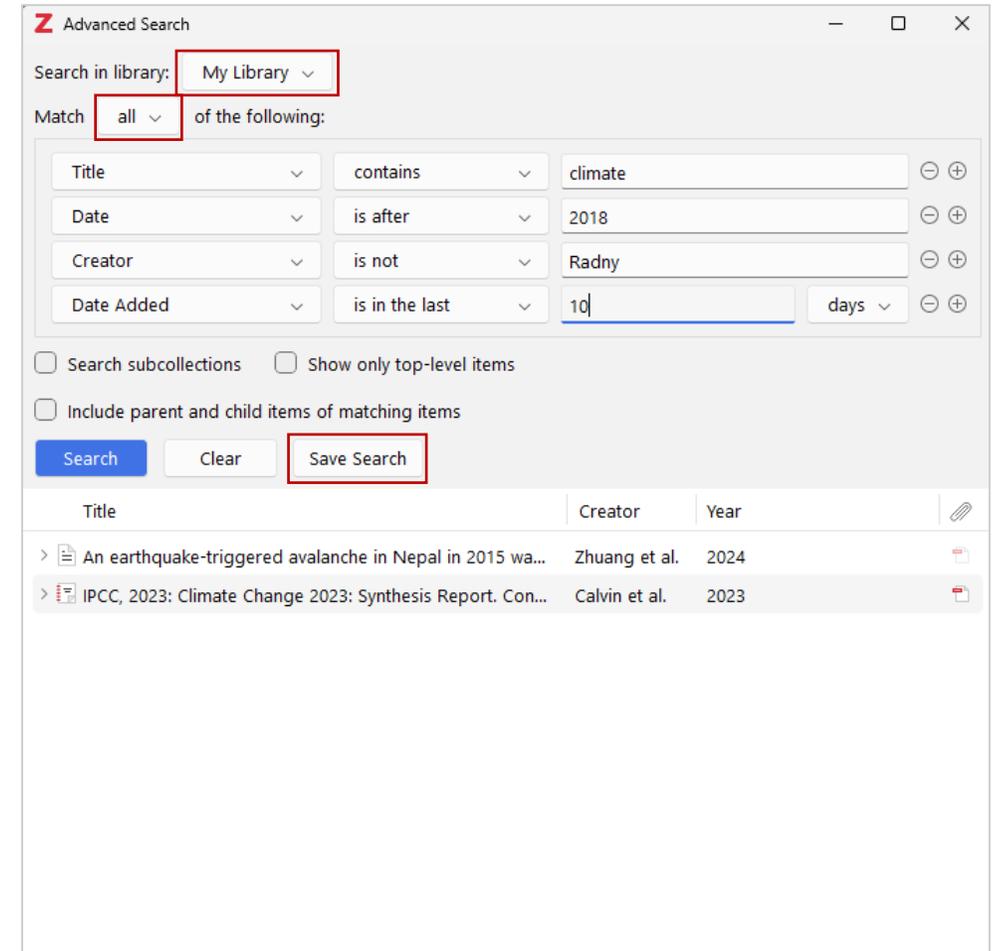
29 items in this view

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



Z Advanced Search

Search in library: My Library ▾

Match all ▾ of the following:

Title	contains	climate	⊖ ⊕
Date	is after	2018	⊖ ⊕
Creator	is not	Radny	⊖ ⊕
Date Added	is in the last	10	days ▾ ⊖ ⊕

Search subcollections Show only top-level items
 Include parent and child items of matching items

Search Clear Save Search

Title	Creator	Year	
>  An earthquake-triggered avalanche in Nepal in 2015 wa...	Zhuang et al.	2024	
>  IPCC, 2023: Climate Change 2023: Synthesis Report. Con...	Calvin et al.	2023	

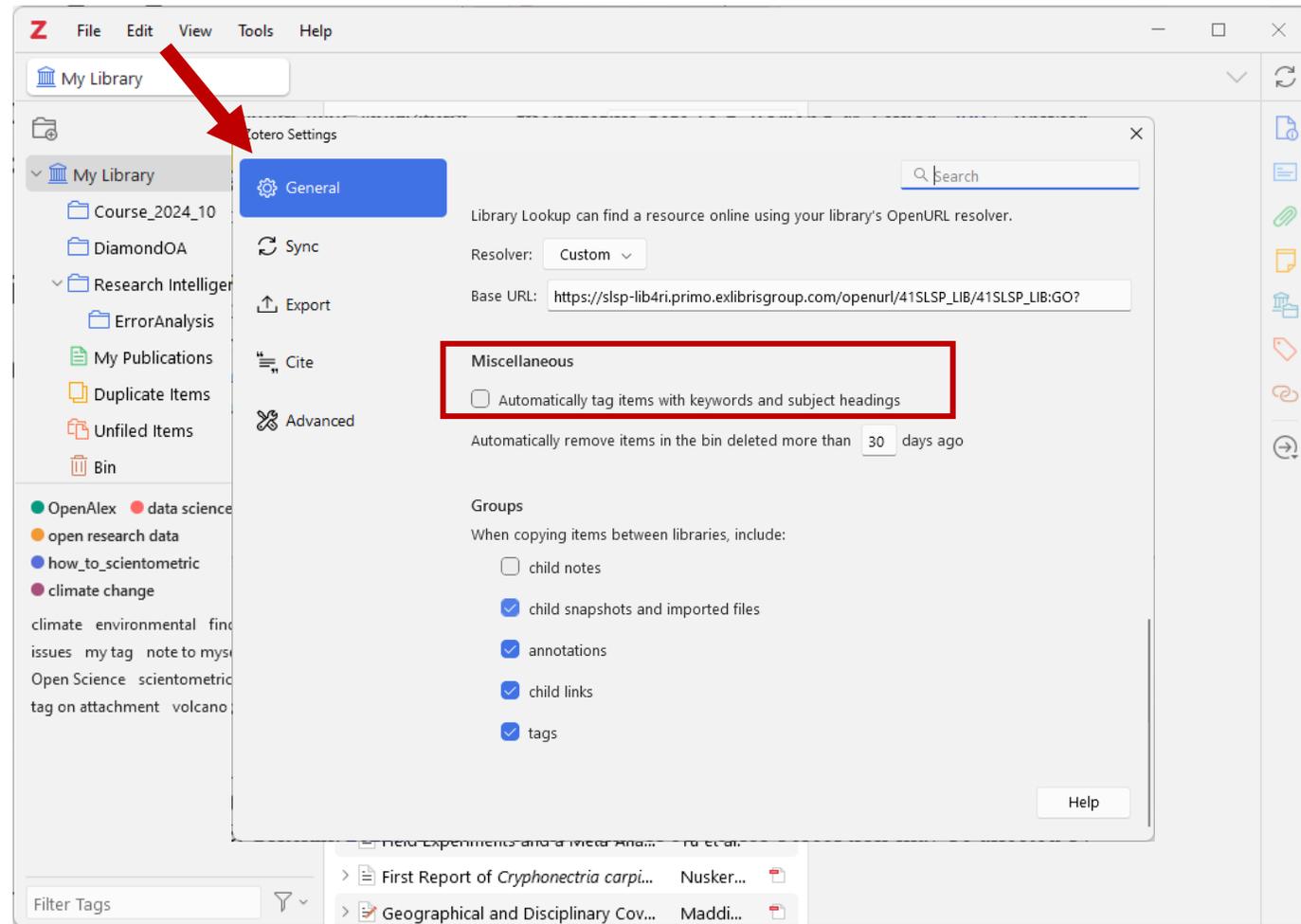
Finding items – Tags

- 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”

The screenshot shows the Zotero application window with the 'My Library' view. The left sidebar displays a tree view of the library structure, including folders like 'Course_2024_10', 'DiamondOA', and 'Research Intelligence'. Below the tree, a list of tags is shown, such as 'OpenAlex', 'data science', 'open research data', etc. A red arrow points to the search bar at the top. A red circle highlights the 'Filter Tags' button, and a red box highlights the 'Show Automatic' checkbox in the dropdown menu, which is currently checked. The main pane shows a list of items with columns for 'Title' and 'Creator'. The status bar at the bottom right indicates '63 items in this view'.

Finding items – Tags

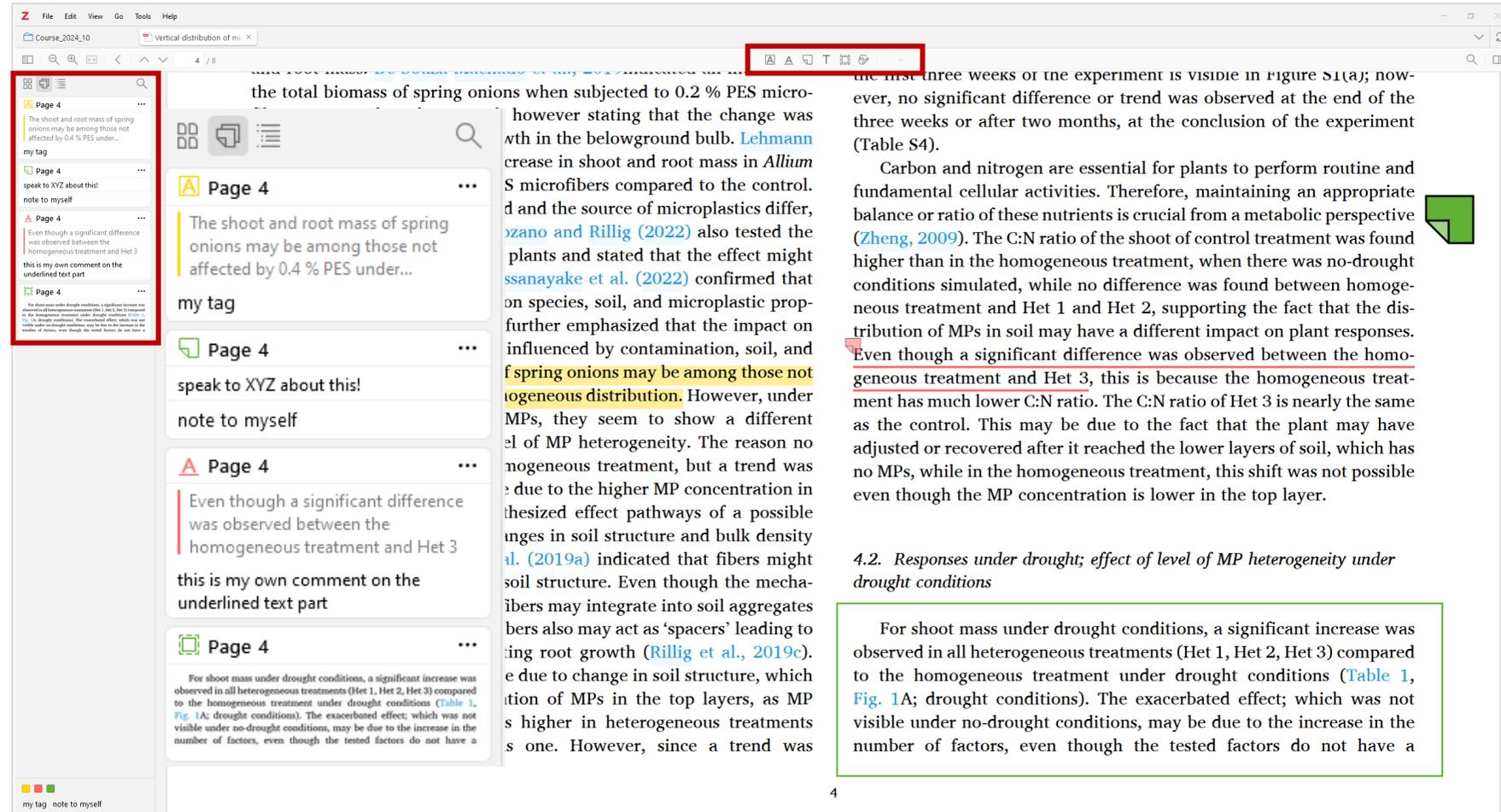
- Create individual tags that fit your personal workflow or categorization
- Up to nine important tags can be assigned with a colour
- Library can be filtered for tags
- Tags are case sensitive!
- **Solution I:** Uncheck “show automatic”
- **Solution II:** Permanently disable auto-tagging: *Edit > Settings > General > Miscellaneous*



Step 3: Read, annotate, summarize

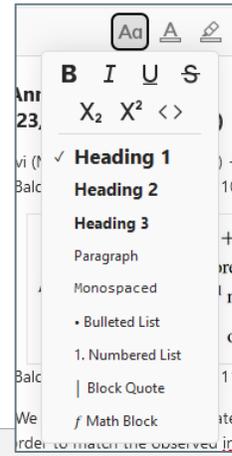
Document reader

- 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

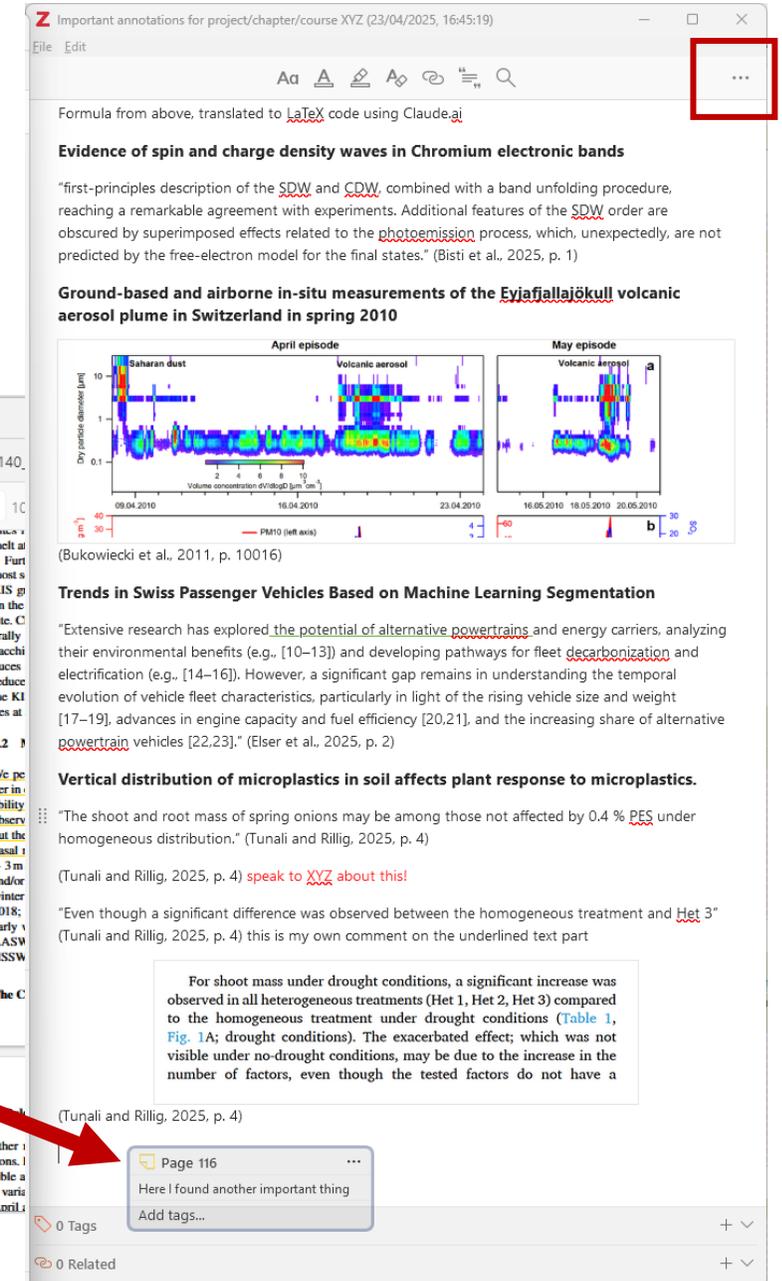
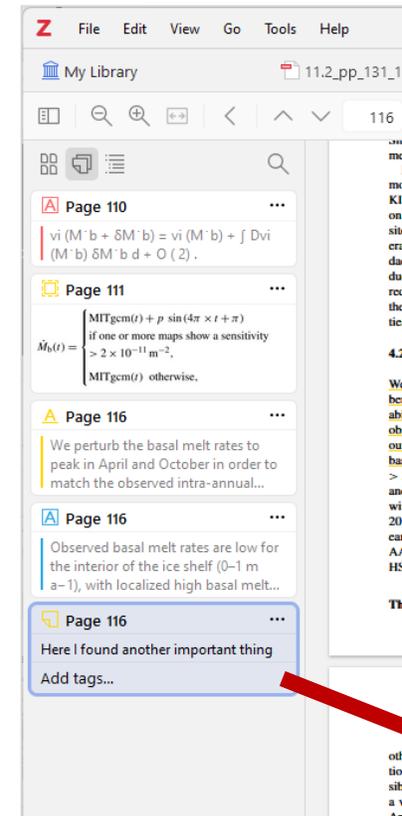
- All annotations can be collected into one item note



The screenshot shows the Zotero browser extension interface. The main window displays a document page with two columns of text. The left column contains a section titled "4.2 Magnitude of variability" with a paragraph about perturbing basal melt rates. The right column contains a paragraph about sea polynya downwelling. A sidebar on the left lists pages 110, 111, 116, and 116, with the last one containing a personal comment. A right sidebar shows a list of annotations, with one annotation selected and its content displayed in a larger view. The annotation content includes a mathematical equation for $\dot{M}_b(t)$ and a reference to Baldacchino et al., 2025, p. 111. A red box highlights a document icon in the right sidebar.

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!

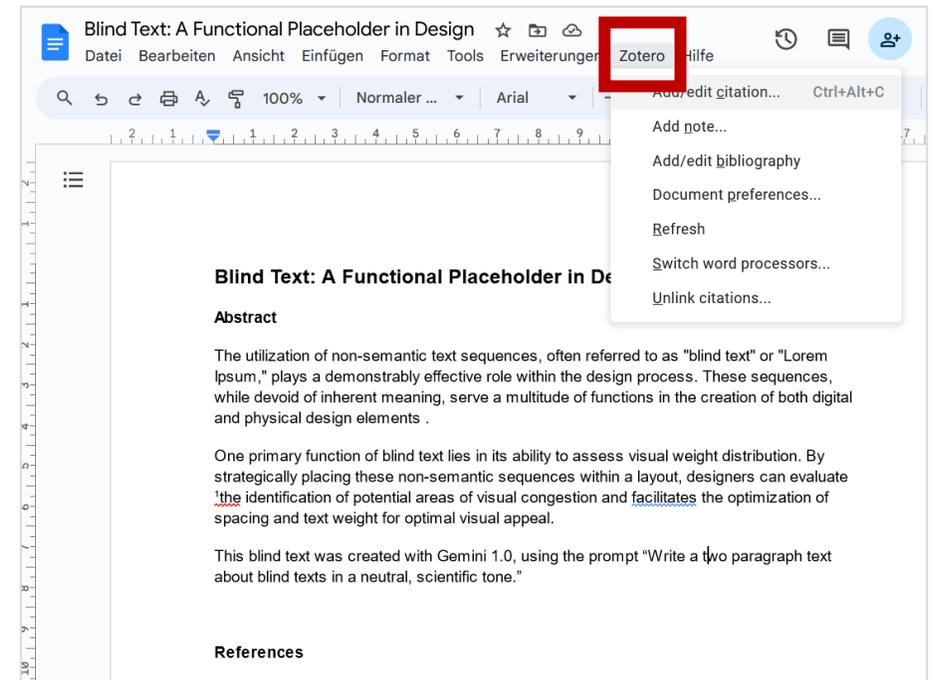
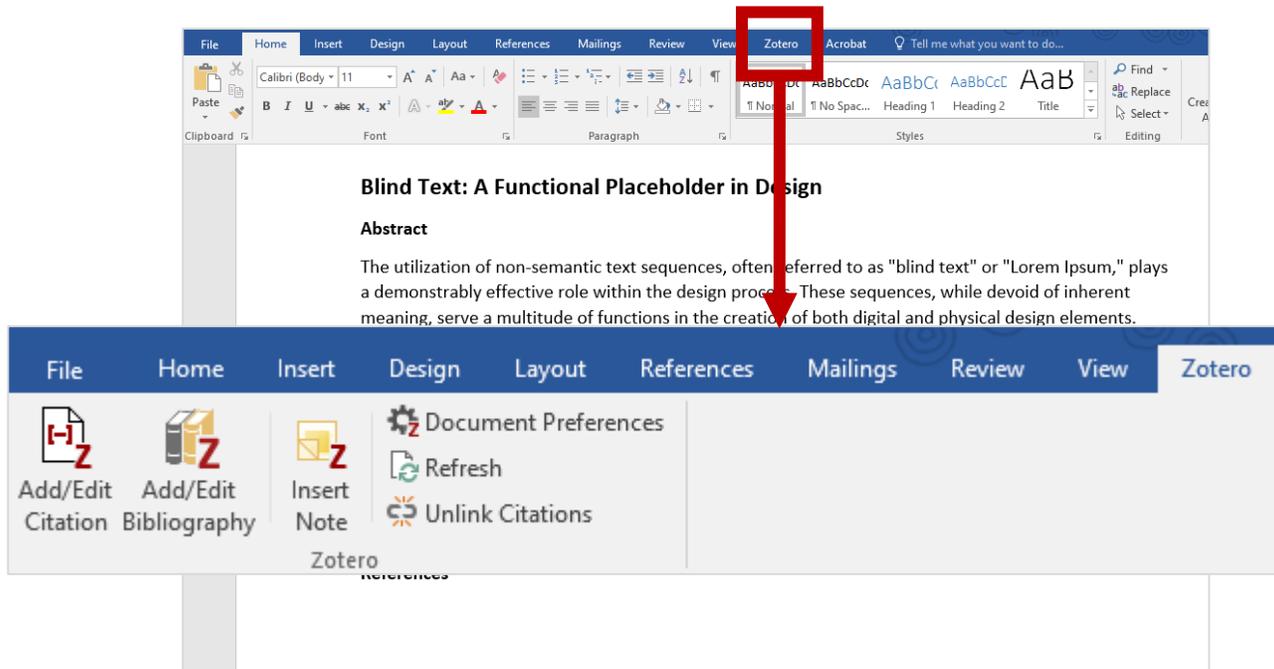
The image illustrates the process of creating a note from annotations in Zotero. It shows three main windows:

- PDF Viewer:** A PDF titled "Data Science in the Library: Tools and Strategies for Supporting Data-Driven Research and Instruction" is open. An annotation on page 136 is highlighted with a red box. The annotation text is: "In much the same way that defining program scope determines the initial framework for the service, a sustainability plan offers an ongoing framework that provides structure as the data program expands to meet changing needs;". A tag "scientometrics" is added to the annotation.
- Collection List:** The "Research Intelligence" collection is selected in the left sidebar. A tag filter "scientometrics" is applied, showing the annotated PDF. A red box highlights the tag filter.
- Context Menu:** A right-click context menu is open over the collection. The option "Create Note from Annotations" is highlighted with a red box.
- Note Window:** A new window titled "Annotations (24/04/2025, 10:03:59)" is open, displaying the content of the selected annotation. The text is: "Data Science in the Library: Tools and Strategies for Supporting Data-Driven Research and Instruction". Below the title, the annotation text is displayed, followed by the citation: "In much the same way that defining program scope determines the initial framework for the service, a sustainability plan offers an ongoing framework that provides structure as the data program expands to meet changing needs." ("Data Science in the Library: Tools and Strategies for Supporting Data-Driven Research and Instruction", 2021, p. 136).

Step 4: Cite-while-you-write

Hands-on: Cite-while-you-write

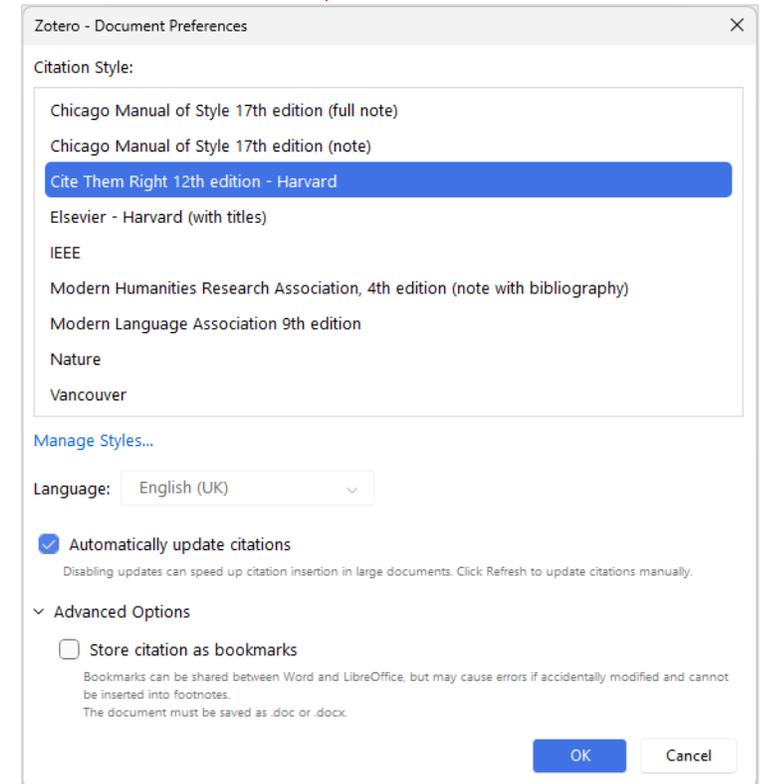
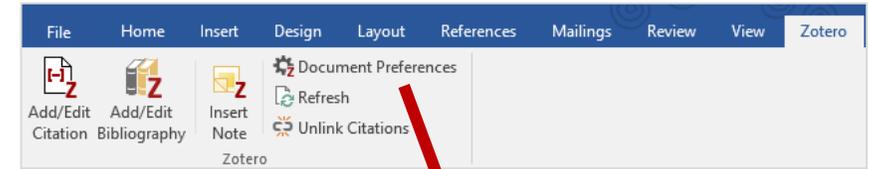
Task: Create a document with a few sentences of text*



*Get blindtext e.g. from [blindtextgenerator.org](https://www.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 ton" ¹.

References

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

Nature

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 ton" (Abel and Bebel, 2035).

References

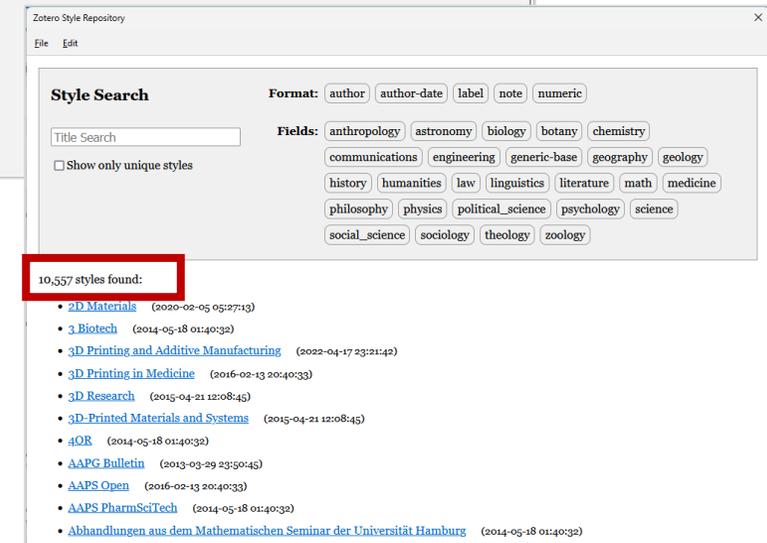
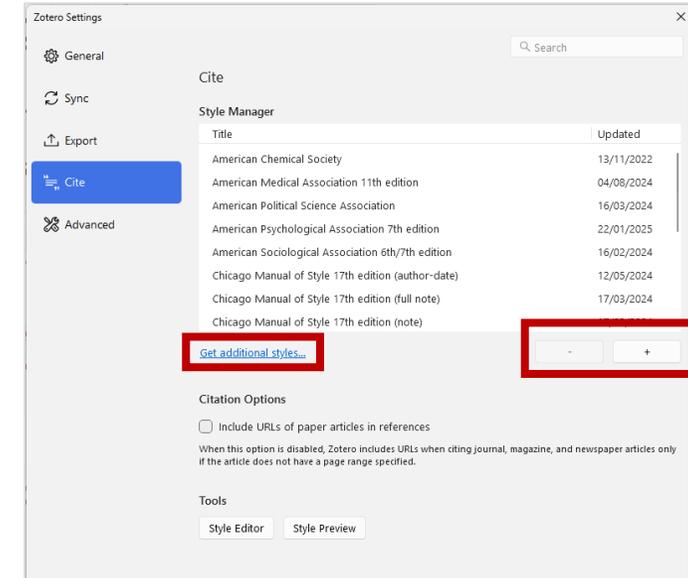
Abel, V., Bebel, W., 2035. Title of a Lorem Ipsum example reference. *J Blind Text Appr* **1**.
<https://doi.org/10.1093/XXXX>

VS.

Elsevier - Harvard

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)

The image shows two screenshots from the Zotero application. The top screenshot is the 'Zotero Settings' window, specifically the 'Cite' tab. It displays a 'Style Manager' table with columns for 'Title' and 'Updated'. A red box highlights the 'Updated' column, showing dates for various citation styles. Below the table, there are 'Citation Options' and 'Tools' buttons, with a red box around 'Style Editor' and 'Style Preview' and a red arrow pointing to the bottom screenshot.

The bottom screenshot is the 'Zotero Style Editor' window. It shows the XML code for a citation style. The 'Citation Style' is set to 'Cite Them Right 12th edition - Harvard' and the 'Language' is 'English (UK)'. The XML code includes fields for title, author, category, and updated date. Below the code, there are sections for 'Individual Citations', 'Single Citation (with position "first")', and 'Bibliography'.

Title	Updated
American Chemical Society	13/11/2022
American Medical Association 11th edition	04/08/2024
American Political Science Association	16/03/2024
American Psychological Association 7th edition	22/01/2025
American Sociological Association 6th/7th edition	16/02/2024
Chicago Manual of Style 17th edition (author-date)	12/05/2024
Chicago Manual of Style 17th edition (full note)	17/03/2024
Chicago Manual of Style 17th edition (note)	17/03/2024

```

1 <?xml version="1.0" encoding="utf-8"?>
2 <style xmlns="http://purl.org/net/xbiblio/csl" class="in-text" version="1.0" demote-non-dropping-particle="some" xml:lang="en" id="Cite Them Right 12th edition - Harvard" />
3 <info>
4 <title>Cite Them Right 12th edition - Harvard</title>
5 <id>http://www.zotero.org/styles/harvard-cite-them-right</id>
6 <link href="http://www.zotero.org/styles/harvard-cite-them-right" rel="self"/>
7 <link href="http://www.zotero.org/styles/harvard-cite-them-right-11th-edition" rel="template"/>
8 <link href="http://www.citethemrightonline.com/" rel="documentation"/>
9 <author>
10 <name>Patrick O'Brien</name>
11 </author>
12 <category citation-format="author-date"/>
13 <category field="generic-base"/>
14 <summary>Harvard according to Cite Them Right, 11th edition.</summary>
15 <updated>2022-06-29T02:44:10+00:00</updated>
16 <rights license="http://creativecommons.org/licenses/by-sa/3.0/">This work is licensed under a Creative Commons Attribution-ShareAlike 3.0 licence.</rights>
    
```

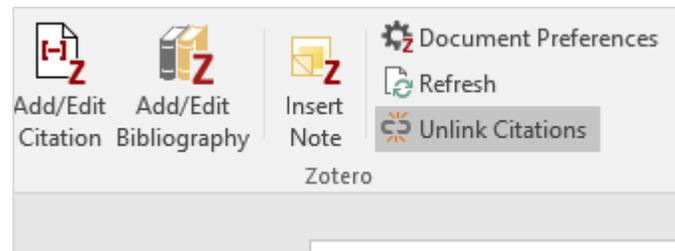
Individual Citations
(Bozinovic and Pörtner, 2015)

Single Citation (with position "first")
(Bozinovic and Pörtner, 2015)

Bibliography
Bozinovic, F. and Pörtner, H. (2015) 'Physiological ecology meets climate change', *Ecology and Evolution*, 5(5), pp. 1025-1030. Available at: <https://doi.org/10.1002/ece3.1403>.

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, Ctrl+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

Blind Text: A Functional Placeholder in Design

Abstract

The utilization of non-semantic text sequences, often referred to as "blind text" or "Lorem Ipsum," plays a demonstrably effective role within the design process (Abel and Bebel, 2035). These sequences, while devoid of inherent meaning, serve a multitude of functions in the creation of both digital and physical design elements (Balmelli et al., 2024; Gonçalves et al., 2024).

According to Carlin (2024), primary function of blind text lies in its ability to assess visual weight distribution (but see Kroll et al., 2024). Strategically placing these non-semantic sequences within a layout, designers can evaluate the balance a assessment allows for the identification of p optimization of spacing and text weight for c

This blind text was created with Gemini 1.0, texts in a neutral, scientific tone".

References

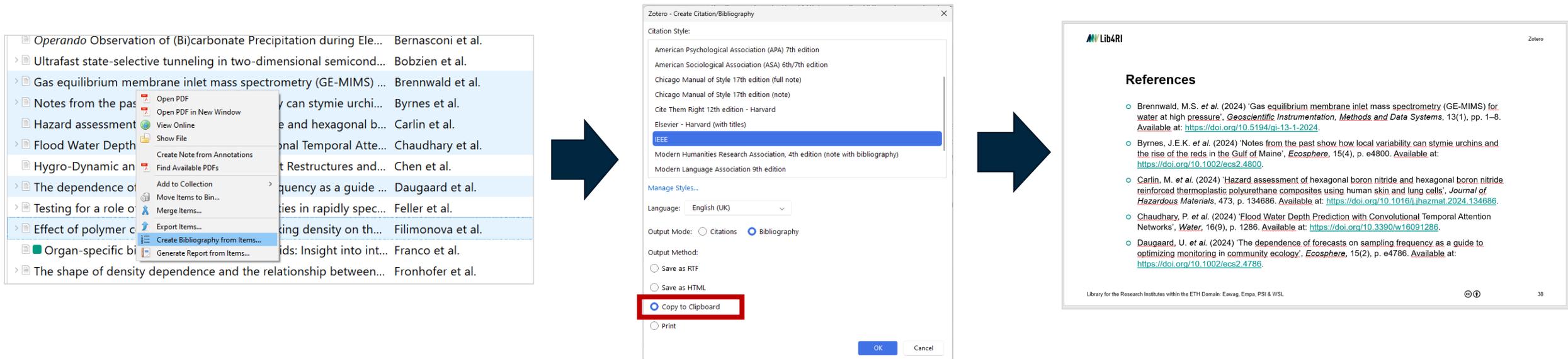
Abel, V., Bebel, W., 2035. Title of a Lorem Ip https://doi.org/10.1093/XXXX

Balmelli, M., Rogers, D., Hilfiker, T., Wright, Y., Soltic, P., 2024. Method for pressure trace based thermodynamic analysis of pre-chamber combustion. Energy Conversion and Management 312, 118561. https://doi.org/10.1016/j.enconman.2024.118561

Carlin, M., Kaur, J., Ciobanu, D.Z., Song, Z., Olsson, M., Totu, T., Gupta, G., Peng, G., González, V.J., Janica, I., Pozo, V.F., Chortarea, S., Buljan, M., Buerki-Thurnherr, T., Rio Castillo, A.E.D., Thorat,

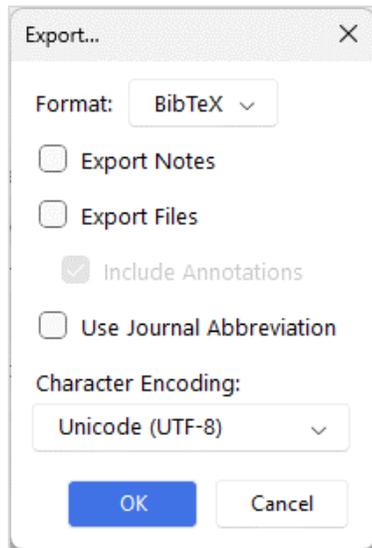
Beyond Word: PowerPoint

- 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!



```

@article{brennwald_gas_2024,
  title = {Gas equilibrium membrane inlet mass spectrometry ((GE)-(MIMS)) for wat
  volume = {13},
  copyright = {https://creativecommons.org/licenses/by/4.0/},
  issn = {2193-0864},
  url = {https://qi.copernicus.org/articles/13/1/2024/},
  doi = {10.5194/qi-13-1-2024},
  abstract = {Abstract. Gas species are widely used as natural or artificial trac
  language = {en},
  number = {1},
  urldate = {2024-05-27},
  journal = {Geoscientific Instrumentation, Methods and Data Systems},
  author = {Brennwald, Matthias S. and Rinaldi, Antonio P. and Gisiger, Jocelyn a
  month = jan,
  year = {2024},
  pages = {1--8},
  file = {Full Text:C:\Users\radnyjan\Zotero\storage\HG5R5H5W\Brennwald et
}

@article{byrnes_notes_2024,
  title = {Notes from the past show how local variability can stymie urchins and
  volume = {15},
  issn = {2150-8925, 2150-8925},
  url = {https://esajournals.onlinelibrary.wiley.com/doi/10.1002/ecs2.4800},
  doi = {10.1002/ecs2.4800},
  abstract = {Abstract
  The impacts of global change—from shifts in climate to overfishing to 1
  language = {en},
  number = {4},
  urldate = {2024-05-27},
  journal = {Ecosphere},
  author = {Byrnes, Jarrett E. K. and Brown, Andrea and Sheridan, Kate and Peller
  month = apr,
  year = {2024},
  pages = {e4800},
  file = {Full Text:C:\Users\radnyjan\Zotero\storage\VA9H5SGBI\Byrnes et al
}
    
```



How to add citations and a bibliography in \LaTeX documents

You can simply use a .bib file containing your BibTeX entries, created with Zotero. To use it in Overleaf, upload the .bib file to your project.

Use `\citep{}` for parenthetical citations: (Abel and Bebel, 2035), or `\citet{}` for narrative in-text citations: Abel and Bebel (2035). To use these, the package `natbib` is required.

Remember to specify a bibliography style, as well as the filename of the .bib.

References

Abel, V. and Bebel, W. (2035). Title of a Lorem Ipsum example reference. *Journal of Blind text appreciation*, 1.

Text snippet based on [Overleaf's](#) "Example Project"

Beyond Word: Quarto

title: "Zotero"
format: html
editor: visual
bibliography: references.bib

Quarto

Quarto enables you to weave together content and executable code into a finished document. To learn more about Quarto see <https://quarto.org>.

You can run your code (R and Python), make graphs and tables, and create a manuscript, presentation or even website content in only one application.

Using Zotero in Quarto documents

RStudio can automatically detect your Zotero installation [Abel2035]. Using *Insert > Citation* in the visual mode, you can easily cite from your library. The bibliography is automatically created at the end of your document. @abe12035 is a mock-up citation.

Hickup: You need to insert a citation to create the *references.bib* and RStudio might say first it does not find it. Delete the citation and insert it again, then it should work.

RStudio can automatically detect your Zotero installation (Abel and Bebel 2035). Using *Insert > Citation* in the visual mode, you can easily cite from your library. The bibliography is automatically created at the end of your document. Abel and Bebel (2035) is a mock-up citation.

Hickup: You need to insert a citation to create the *references.bib* and RStudio might say first it does not find it. Delete the citation and insert it again, then it should work.

References

Abel, Xavier, and Yves Bebel. 2035. "Using Blind Texts." *Journal of Blind Text Appreciation* 1 (1).

Search for citation

- @sesana2021 Sesana, E, Gagnon, A, Ciantelli, et al. 2021
Climate change impacts on cultural heritage: A literature review
- @simard Simard, M, Basson, I, Hare, M, Lariviere, V
The open access coverage of OpenAlex, Scopus and Web of Science
- @staecker2025 Staecker, T, Apel, J, Arning, U et al. 2025
SeDOA – Servicestelle Diamond Open Access
- @stenseth2003 Stenseth, N, Ottersen, G, Hurrell, et al. 2003
Review article. Studying climate effects on ecology through the use of climate indices: t...
- @swissuni2024 2024
swissuniversities project – recognise ORD (recORD) | FORs
- @tabarelli2005 Tabarelli, M, Pinto, L, Silva, et al. 2005
Challenges and Opportunities for Biodiversity Conservation in the Brazilian Atlantic For...
- @technica
Technical Writing
- @teixeiradasilva2023 Teixeira da Silva, J, Huang, C 2023

Add to: references.bib

Insert Cancel

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)

My Library	Title	Creator
<ul style="list-style-type: none"> MyThesis <ul style="list-style-type: none"> Chapter1 Chapter2 	<ul style="list-style-type: none"> Flood Water Depth Prediction with Convolutional Temporal ... 	Chaudhary et al.
	<ul style="list-style-type: none"> Hygro-Dynamic and Conductive Actuator That Restructures ... 	Chen et al.
	<ul style="list-style-type: none"> The dependence of forecasts on sampling frequency as a ... 	Daugaard et al.
<ul style="list-style-type: none"> chapter1 chapter2 AIR another tag APRIL ASH 	<ul style="list-style-type: none"> On Evaluating Social Learning Outcomes of Serious Games t... 	Den Haan and Van der Voort
	<ul style="list-style-type: none"> Testing for a role of postzygotic incompatibilities in rapidl... 	Feller et al.

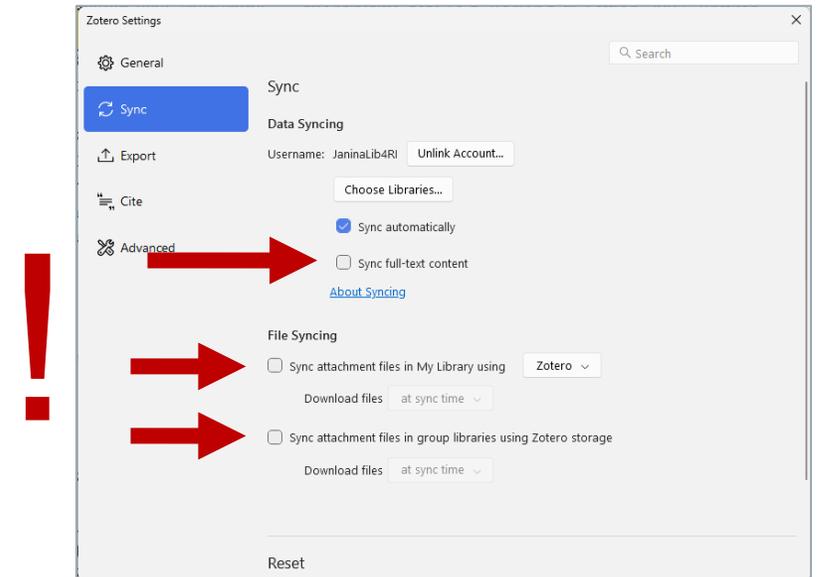
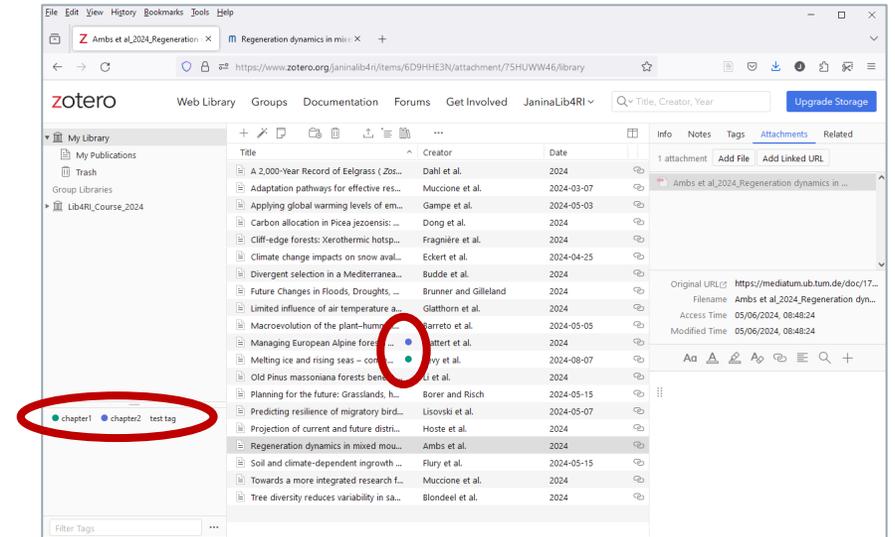
Step 5: Sync and collaborate

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:

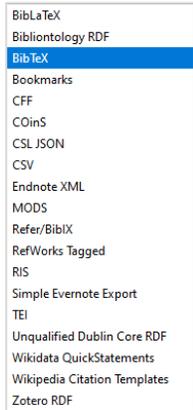
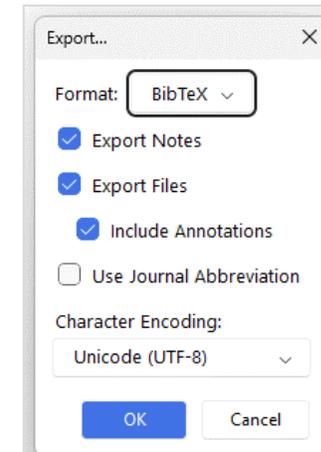
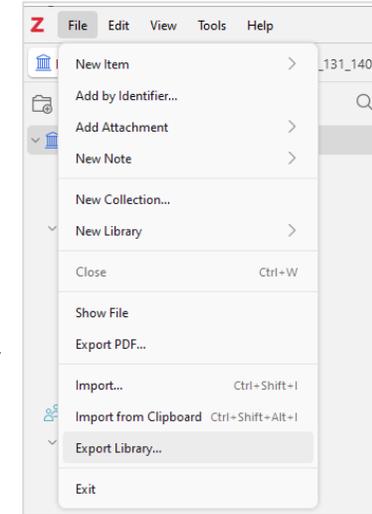
- Upgrade your Zotero storage (20-120\$/yr)
- Choose your own cloud over Zotero server to sync your personal library
 - Not recommended by Zotero, risk of corrupted databases
 - Read more at zotero.org/support/sync



Working with colleagues

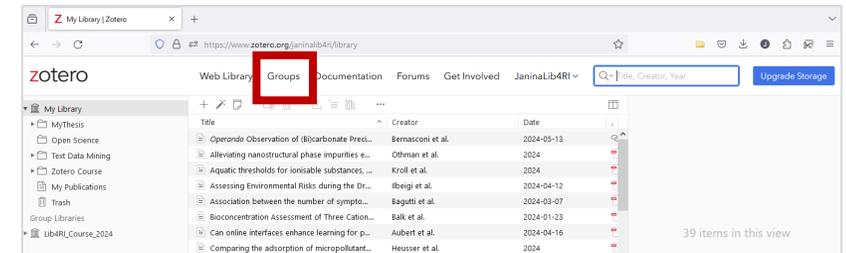
Sharing a library

- 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



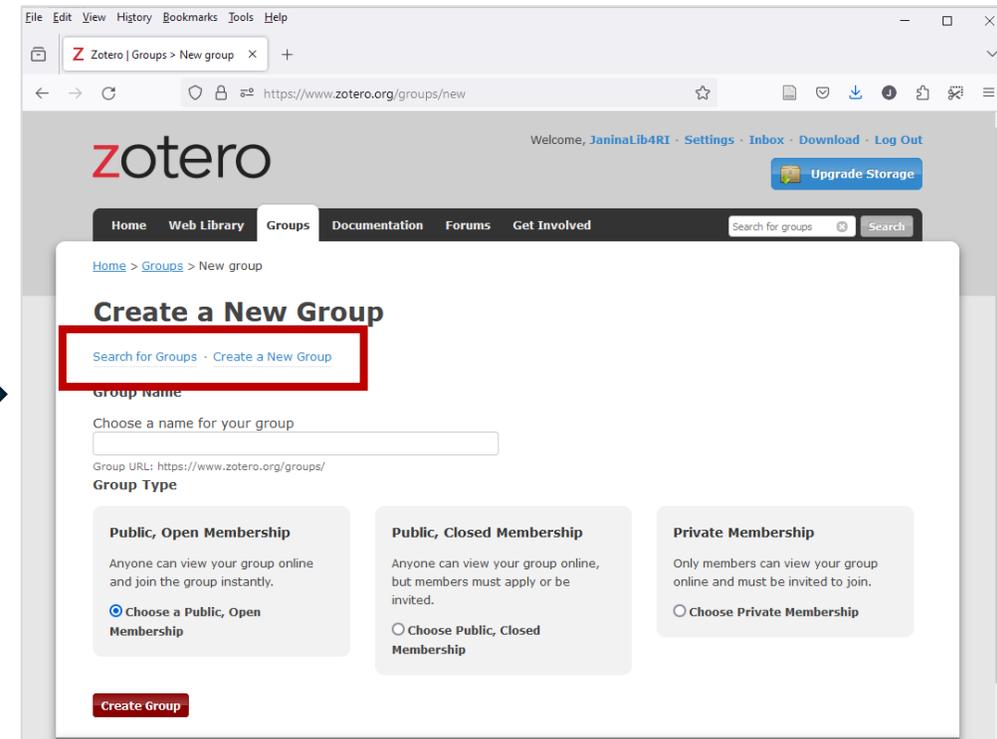
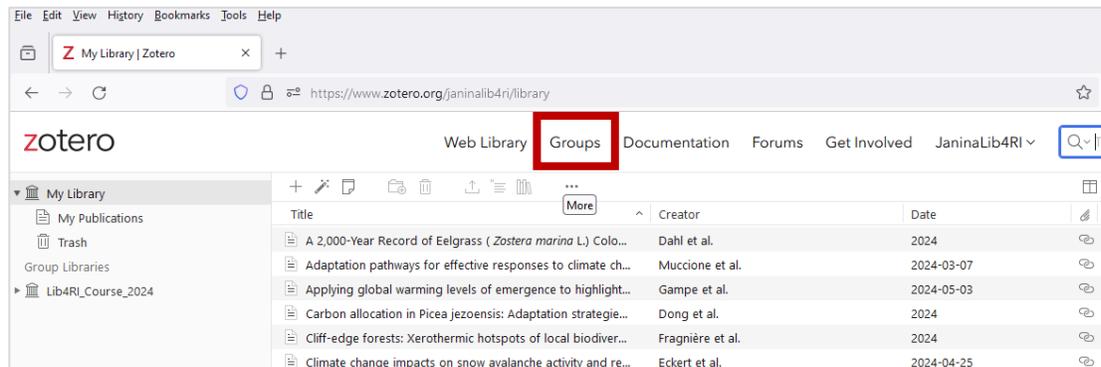
Working together in one file

- 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](https://www.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?