Literature management with Zotero

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Lib4RI Training series: Searching & Managing Scientific Information

- Module 1: Searching Scientific Information
- o 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: Al Made Easy
- Module 8b: AI in Research & Scientific Writing

MV Lib4RI

Searching & Managing Scientific Information

Training series

Spring 2024

Modules:

- 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)
- 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/training:

Library for the Research Institutes within the ETH Domain: Eawag, Empa, PSI & WSL

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

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Course Evaluation Lib4RI Training Series: Searching & Managing Scientific Information Module Ab: Literature Management with Zotero Organisation: □Eawag □Empa □PSI □WSL Session date:	LE	orary for th	te Rosear nin: Eawa	ch Instit o Empa	+ RA abos vithin PSI X WSL
Please rate the following statements	stongy agee	attee	neutral	disagnee	strongly disagree
1 Content	5	4	3	2	1
a) Overall, the course fully met my expectations					
b) The knowledge provided is useful for my work					
c) The level of difficulty and the comprehensibility of the presentation was appropriate	۵				
d) There was a good balance between the course length and subject matter					
e) Examples shown during the live session were appropriate					
			_	_	
z 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	story) agree	agree	neutral	disagree	ongy disagnee
					sta
4 Presentation and Organisation	5	4	3	2	1
 The course was well structured and had a clear theme 					
b) The group size was appropriate					
c) The documents distributed are useful	-	-	-		-
d) The duration of the course and use of time were appropriate	-	-	•	-	•
 The course announcement and the information given were clear and correct 					
5 What did you like most?					
			-	-	
6 What could be improved?					

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?



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

Zotero

Literature management software helps to:

Organize

- Gather and import information
- o 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



Zotero

- Free and open source
- Well-structured interface and powerful integrated reader (V6 and higher)
- Import with one click
- o Cite-while-you-write



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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

- o 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

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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)



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Hands-on literature management

Zotero

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

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Finding literature

-11	Scopus	
	Start exploring	
	Description tables - Describe Discourse - Oversiteday	Search tips
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scopus.com



webofscience.com

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More info? Check out our resources!

- Training: Searching Scientific Information
- Info sheet: Topic Search
- Website: Systematic literature search



openalex.org



arxiv.org/ (pre-prints)

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Import via browser connector



Zotero



Item types

- Depending on the item type, different metadata is included, e.g. 0
 - Publication (journal name) for articles
 - Edition number for books
 - Access date for web resources
 - 0

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Title		Creator	Ø	👌 Info	
> 🖹 Ground-based and airborne in-situ measurements of t	the Eyjafjallajokull vol	Bukowiecki et al.	Ē	ltem Type	Book Section
> 🗐 Icelandic volcano eruption sends lava flowing in visual	spectacle	McDaniel		Title	Atmospheric Particle Nucleation
> 🗓 Eyjafjallajökull – Der unaussprechliche Vulkanfilm				Author	Sipilä, Mikko
Aerosol science: technology and applications		Colbeck		Author	Lehtipalo, Katrianne
> 🖽 Atmospheric Particle Nucleation		Sipilä et al.	Ð	Author	Kulmala, Markku
				Book Title	Aerosol Science





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

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Other import options II

- Drag & Drop PDFs metadata is searched and added
- Missing information can be added manually







Biodiversität und	ökologischer Ausgleich auf Flugplätzen	
hnfo		
Item Type	Journal Article	
Title	Biodiversität und ökologischer Ausgleich auf Flugplätzen	
Author	(last), (first)	
Publication		
Volume		
Issue		
Pages		
Date	2019	
Series		
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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: <u>10.5194/acp-11-10011-2011</u>.

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?



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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: <u>support.clarivate.com</u>), 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 <u>lib4ri.ch/copyright-cc-licences</u> 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

- o Several items with metadata are available
- o Select the desired items

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Step 2: Organize your library

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Hands-On: Tidy-up your library





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: <u>retractionwatch.com</u>)

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Zotero



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



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Example library:

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~ <u>m</u> N	/ly Library	Title	Creator	Ø			
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E	OA_Monitoring	> III Atmospheric Particle Nucleation	Sipilä et al.	•	Item Type Journal Article		
E	Ontologies	> 💷 Icelandic volcano eruption sends lava flowing in visual spectacle	McDaniel		nanocarriers for plant		
E	savedrecs	> 🖳 Eyjafjallajökull – Der unaussprechliche Vulkanfilm			growth promotion: fuelling when needed	# <u>`</u>	
e	My Publications	Mixed phase Ce+3 substituted ZnFe2-xCexO4, structural, optical, I–V, magnetic and dielectric fea	t Ali et al.		Author Ashfag Mohammad	\diamond	
Q	Duplicate Items	Giovanni Camino (1941 - 2024)	Alongi et al.		Author Gupta, Govind	୍ଷ	
tî de	Unfiled Items	Surface functionalization of fibrous material by roll-to-roll low pressure plasma processing	Amberg et al.	_	Author Verma, Nishith		
	Retracted Items	Carbon-based nanocarriers for plant growth promotion: fuelling when needed	Ashfaq et al.		Publication Nanoscale	Ģį	
н с		Direct Observation of Fully Spin-Polarized Tunnel Current Between Quantum Spins Using a Single	Bae et al.		Volume 17		
pliections pa	ane	Lignin-based porous carbon adsorbents for CO ₂ capture	Barker-Rothschild et al.		Issue 2		
•		Leaf level Ash Dieback Disease Detection and Online Severity Estimation with UAVs	Bates et al.	_	Pages 616-634		
		Navigating the Carbon Maze: A Roadmap to Effective Carbon Conductive			Date 2025		
		Al- aided surrogate model for prediction of HVAC optimization strategies	is	_	Series		
		Climate-Responsive Building Envelope Retrofit: Insulation Strategies in a C			Series Text		
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• comr	ment 😑 appendix	Development of a GHG-based control strategy for a fleet of hybrid heat pumps to decarbonize		_	Short Title Carbon-based		
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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 <u>Lib4RI document delivery service</u>!



Finding items – Quick search

- Default: Search all fields and tags 0
- Refine or extend the quick search in the dropdown menu



30

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

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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"



Display All Tags in This Library Delete Automatic Tags in This Library...

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 autotagging: *Edit* > *Settings* > *General* > *Miscellaneous*



Zotero

Step 3: Read, annotate, summarize

Library for the Research Institutes within the ETH Domain: Eawag, Empa, PSI & WSL

Document reader

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Course 2024 1

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my tag note f

Vertical distribution of mic

- Works with most attachment \mathbf{O} types, incl. snapshots
- Document outline and \mathbf{O} search in text
- Cross-references (citations, 0 tables, figures...)
- Mark sections to create \mathbf{O} annotations
- Tags and comments can be 0 added to any annotation

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ingrificant difference trevent the reatment and Het 3 mment on the int reading of the second s	The shoot and root mass of spring onions may be among those not affected by 0.4 % PES under my tag		d and the source of microplastics differ, ozano and Rillig (2022) also tested the plants and stated that the effect might ssanayake et al. (2022) confirmed that on species, soil, and microplastic prop-
ion, may be due to the increase in the gh the tested factors do not have a	Page 4		further emphasized that the impact on influenced by contamination, soil, and
	speak to XYZ about this!		f spring onions may be among those not ogeneous distribution. However, under
	note to myself		MPs, they seem to show a different
	A Page 4		nogeneous treatment, but a trend was
	Even though a significant difference was observed between the homogeneous treatment and Het this is my own comment on the	ce 3	e due to the higher MP concentration in thesized effect pathways of a possible unges in soil structure and bulk density al. (2019a) indicated that fibers might soil structure. Even though the mecha-
	underlined text part		ibers may integrate into soil aggregates
	🛄 Page 4		bers also may act as 'spacers' leading to ing root growth (Rillig et al., 2019c).
	For shoot mass under drought conditions, a significant increas observed in all heterogeneous treatments (Het 1, Het 2, Het 3) con to the hemogeneous treatment under drought conditions (Π Fig. 1A; drought condition). The exacerbased effect, which w visible under no-drought conditionn, may be due to the increase number of factors, even though the tested factors do not h	se was apared ble 1, as not in the save a	e due to change in soil structure, which ation of MPs in the top layers, as MP s higher in heterogeneous treatments s one. However, since a trend was
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A A 7 T 🗇 🔗

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ne mst inree weeks of the experiment is visible in Figure Si(a); nowever, no significant difference or trend was observed at the end of the three weeks or after two months, at the conclusion of the experiment (Table S4).

Carbon and nitrogen are essential for plants to perform routine and fundamental cellular activities. Therefore, maintaining an appropriate balance or ratio of these nutrients is crucial from a metabolic perspective (Zheng, 2009). The C:N ratio of the shoot of control treatment was found higher than in the homogeneous treatment, when there was no-drought conditions simulated, while no difference was found between homogeneous treatment and Het 1 and Het 2, supporting the fact that the distribution of MPs in soil may have a different impact on plant responses. Even though a significant difference was observed between the homogeneous treatment and Het 3, this is because the homogeneous treatment has much lower C:N ratio. The C:N ratio of Het 3 is nearly the same as the control. This may be due to the fact that the plant may have adjusted or recovered after it reached the lower layers of soil, which has no MPs, while in the homogeneous treatment, this shift was not possible even though the MP concentration is lower in the top layer.

4.2. Responses under drought; effect of level of MP heterogeneity under drought conditions

For shoot mass under drought conditions, a significant increase was observed in all heterogeneous treatments (Het 1, Het 2, Het 3) compared to the homogeneous treatment under drought conditions (Table 1, Fig. 1A; drought conditions). The exacerbated effect; which was not visible under no-drought conditions, may be due to the increase in the number of factors, even though the tested factors do not have a

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Mark-down notes from annotations

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Evidence of spin and charge density waves in Chromium electronic bands

"first-principles description of the SDW and CDW, combined with a band unfolding procedure, reaching a remarkable agreement with experiments. Additional features of the SDW order are obscured by superimposed effects related to the <u>photoemission</u> process, which, unexpectedly, are not predicted by the free-electron model for the final states." (Bisti et al., 2025, p. 1)

Ground-based and airborne in-situ measurements of the <u>Eyjafjallajökull</u> volcanic aerosol plume in Switzerland in spring 2010





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A Page 110

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Trends in Swiss Passenger Vehicles Based on Machine Learning Segmentation

"Extensive research has explored the potential of alternative powertrains and energy carriers, analyzing their environmental benefits (e.g., [10–13]) and developing pathways for fleet decarbonization and electrification (e.g., [14–16]). However, a significant gap remains in understanding the temporal evolution of vehicle fleet characteristics, particularly in light of the rising vehicle size and weight [17–19], advances in engine capacity and fuel efficiency [20.21], and the increasing share of alternative powertrain vehicles [22.23]." (Elser et al., 2025, p. 2)

Vertical distribution of microplastics in soil affects plant response to microplastics.

"The shoot and root mass of spring onions may be among those not affected by 0.4 % <u>PES</u> under homogeneous distribution." (Tunali and Rillig, 2025, p. 4)

(Tunali and Rillig, 2025, p. 4) speak to XYZ about this!

"Even though a significant difference was observed between the homogeneous treatment and Het 3" (Tunali and Rillig, 2025, p. 4) this is my own comment on the underlined text part



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Step 4: Cite-while-you-write

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Hands-on: Cite-while-you-write

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*Get blindtext e.g. from <u>blindtextgenerator.org</u> or generative LLMs

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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.
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References
1. Abel, V. & Bebel, W. Title of a Lorem Ipsum example reference. <i>J Blind Text Appr</i> 1, (2035).
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 Nature

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 - Click the reference in the format window
 - O 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).



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!



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Citation Style:	
American Psychological Association (APA) 7th edition	
American Sociological Association (ASA) 6th/7th edition	
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)	
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Modern Humanities Research Association, 4th edition (note with bibliography)	
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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!



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





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 <u>according packages</u> (training available at Lib4RI)

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🖻 Chapter1	Hygro-Dynamic and Conductive Actuator That Restructures	Chen et al.
🖻 Chapter2	> 🖹 💶 The dependence of forecasts on sampling frequency as a	Daugaard et al.
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another tag APRIL ASH	> 🖻 💶 Testing for a role of postzygotic incompatibilities in rapidl	Feller et al.

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Step 5: Sync and collaborate

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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 <</p>
 - 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 <u>zotero.org/support/sync</u>

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		Cliff-edge for	rests: Xerothermic hotsp	Fragnière et al.	2024	P			
		Climate char	ige impacts on snow aval	Eckert et al.	2024-04-25	Q			
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Sync attachment files in group libraries using Zotero storage

Download files at sync time

Reset

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



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	Comparing the adsorption of micropollutant	Heusser et al.	2024	÷		



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"

<u>File Edit View History Bookmarks</u>	Help			
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Hands-on: Group libraries

- Registration required at <u>Zotero.org</u>
- 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!

Zotero

Questions left?