

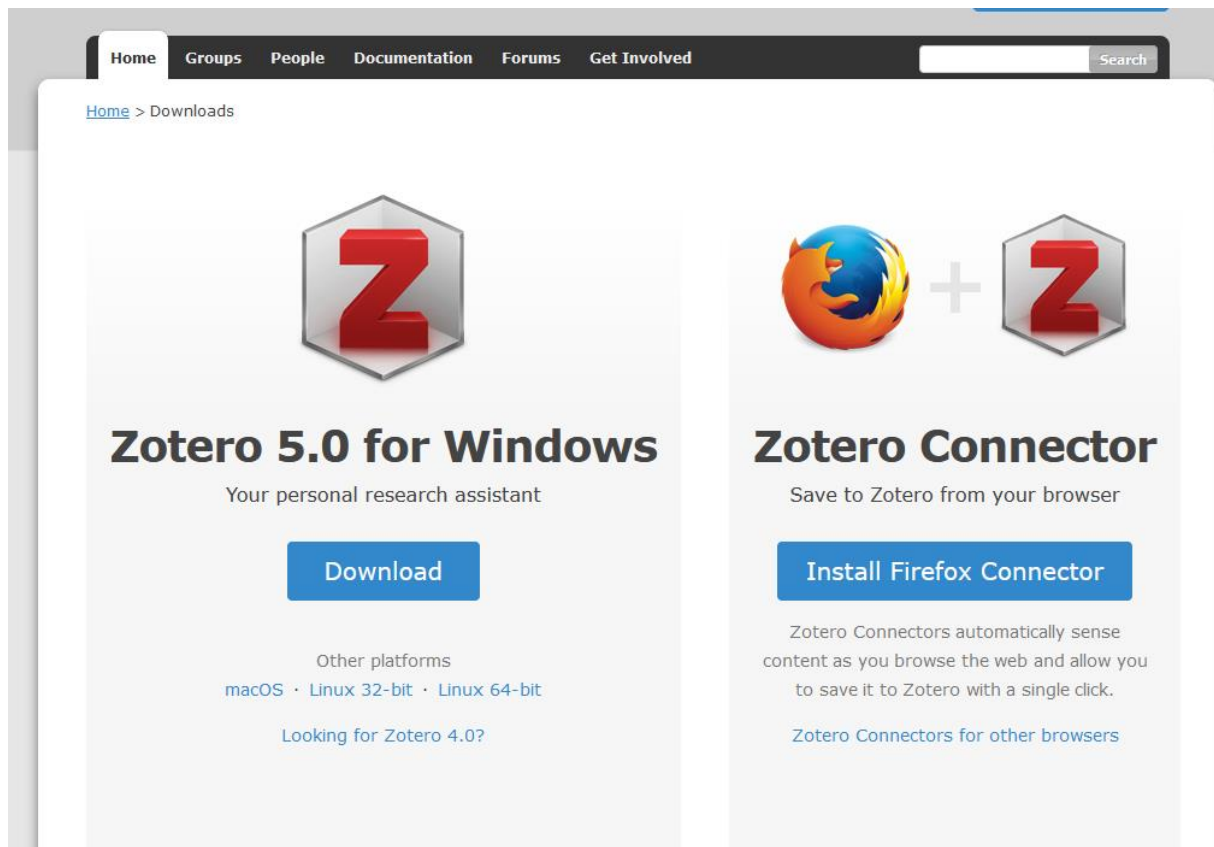
Table of contents

Zotero - User guide –Basic information	2
Zotero’s platform	3
Downloading documents	5
Library Catalog.....	5
SuperSearch.....	5
A) Downloading the pdf, retrieving metadata.....	6
B) Saving individual articles as .ris-file.....	7
C) Saving multiple articles’ bibliographic data, exporting them as .ris file.....	8
Troubleshooting	9
A) If Connector fails	9
B) If all else fails: manual data entry.....	9
Creating a Bibliography	10
Cite-while-you-write plugin.....	11
Registration and Synchronisation	14

Zotero - User guide –Basic information

Zotero is an open-source reference manager software. It helps you to collect, organize documents, to insert quotations and create a bibliography.

As a first step download the software from zotero.org and add the Connector. The software works well with different operating systems (Windows, Linux, MacOS). The Connector helps you to save documents with one click. If you use Chrome or Safari, the browser will recognise it and offers you the appropriate Connector.

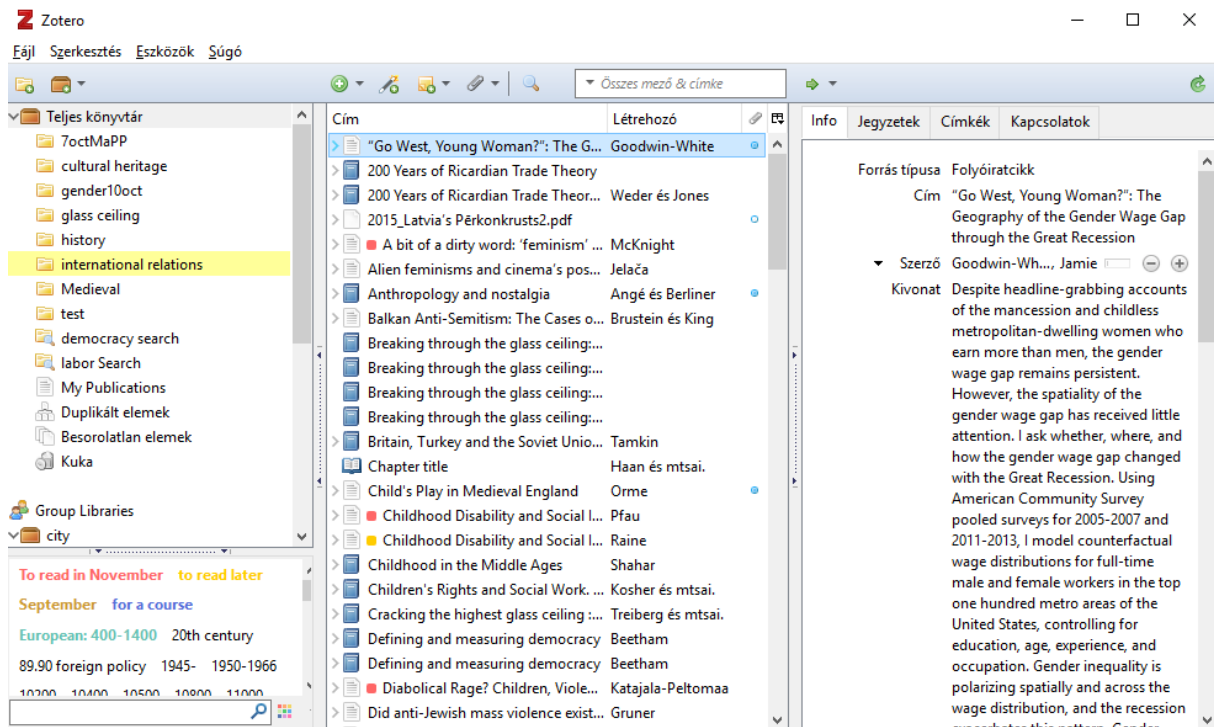


After downloading, the software's icon will appear on your desktop, while Connector icon will be shown in the URL lane. Connector's format depends on the content of the page: it can be a sheet of paper, a folder, a microphone, etc.

The Zotero interface language is the same as the browser's language. To change it: Edit/Preferences/Advanced/Language


300 MB of storage space is free, can be upgraded by paying extra.

Zotero's platform



Left column: folders Base folders are grey:

- My publications: here you can upload your own documents.
- Duplicate items: if you have accidentally downloaded documents more than once, Zotero will collect them here. To merge the items click on merge button in the right-hand window.
- Unfiled items: all documents that have not been separated into folders will be stored here.
- Trash: anything you no longer need and have been placed here. Items can be restored as long as they are not deleted from Trash.

To create a new directory, click on the first icon: (new collection):  and name it. You can create subdirectories, rename existing ones, delete unnecessary ones (right click on folders).

Middle column: here you can find the documents you have downloaded. If you click on the small triangle in front of the document, you can see what attachments are included (fulltext, URL, annotation, etc.)

Right column:

- Info: the metadata (bibliographic data) that Zotero uses to generate citations. All rows can be revised manually.
- Notes: can be added to the document, Zotero saves them.
- Tags (keywords, subject headings): added by the search engine, the publisher, the author or privately. All of them are searchable in the left bottom section below the folders.

- Related: linking documents that belong together: book-book chapter, conference proceedings.
- Scite: (if you have downloaded the plugin): lists how an article has been cited (supported, discussed, mentioned). More information: Zotero Advanced - Scite plugin.

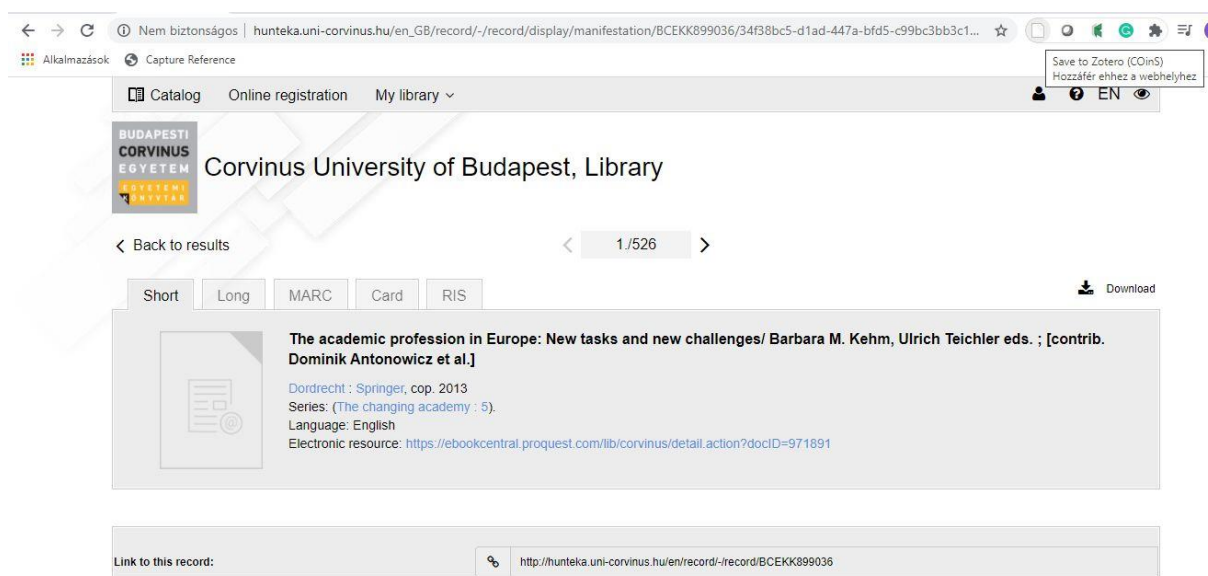
Downloading documents

You can download documents from almost any website, e.g. library catalogue, SuperSearch, GoogleScholar, databases, etc. Zotero must be open to save. If you want to save the data to a specific directory, you have to highlight it.

Examples of saving:

Library Catalog

1. You can use the Connector to download records from the catalogue. Open the record and click on the connector, it will automatically save the record to Zotero.

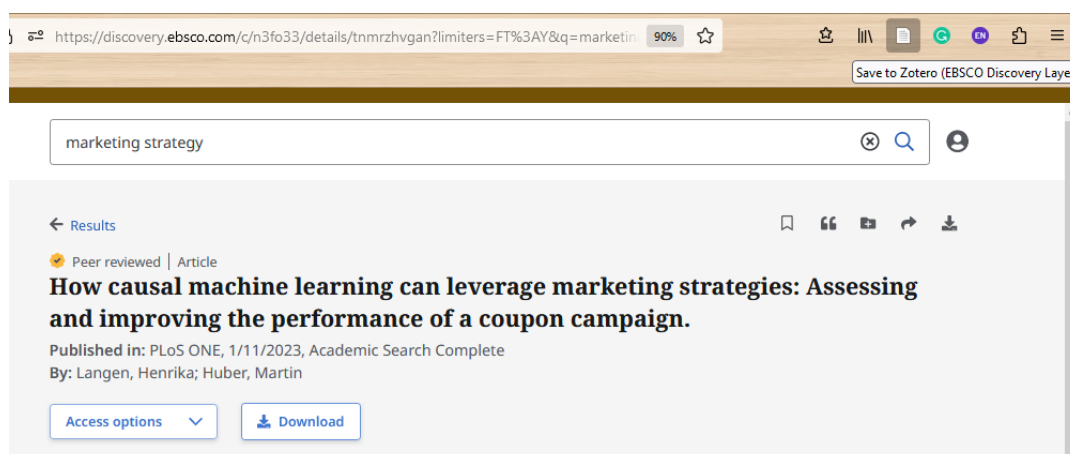


The screenshot shows a web browser window displaying the Corvinus University of Budapest Library website. The page title is "Corvinus University of Budapest, Library". Below the header, there are navigation options: "Catalog", "Online registration", and "My library". A search bar contains "1/526". The main content area shows a record for "The academic profession in Europe: New tasks and new challenges/ Barbara M. Kehm, Ulrich Teichler eds. ; [contrib. Dominik Antonowicz et al.]". The record details include: "Dordrecht : Springer, cop. 2013", "Series: (The changing academy : 5).", "Language: English", and "Electronic resource: https://ebookcentral.proquest.com/lib/corvinus/detail.action?docID=971891". There are buttons for "Short", "Long", "MARC", "Card", "RIS", and "Download". At the bottom, there is a "Link to this record:" field with the URL: http://hunteka.uni-corvinus.hu/en/record/-/record/BCEKK899036.

SuperSearch

Connector works fine from SuperSearch. One or several more records can be downloaded at the same time.

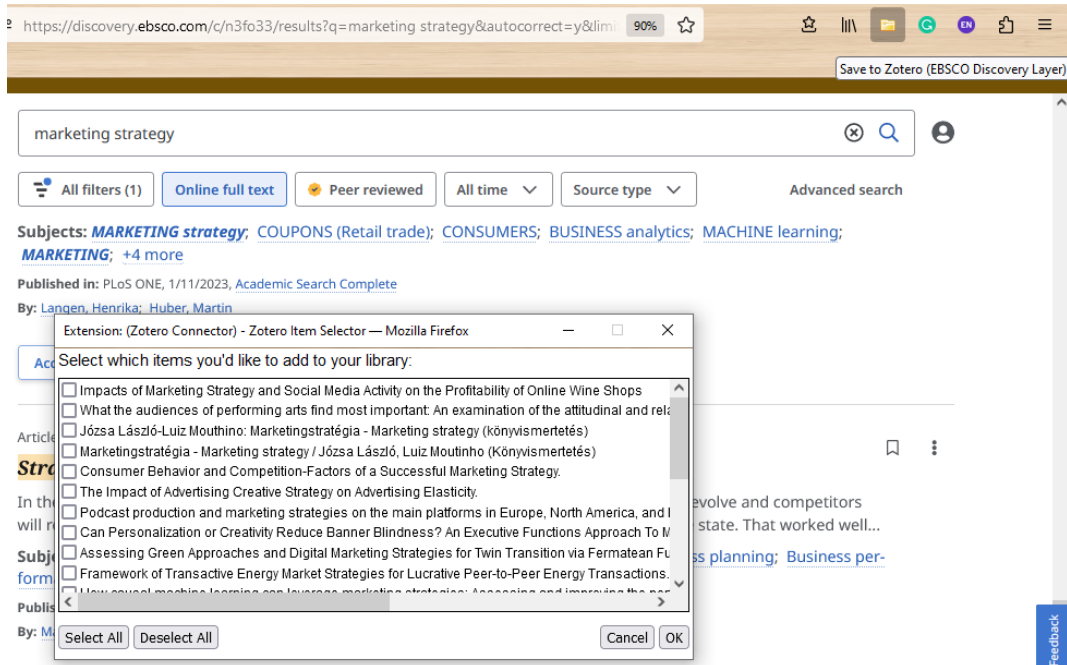
- A) Downloading one record: click on the document title, open it, then click on Connector (looks like as a sheet of paper):



The screenshot shows a web browser window displaying the EBSCO Discovery Layer search results for "marketing strategy". The search bar contains "marketing strategy". The results show a record for "How causal machine learning can leverage marketing strategies: Assessing and improving the performance of a coupon campaign." The record details include: "Peer reviewed | Article", "Published in: PLoS ONE, 1/11/2023, Academic Search Complete", and "By: Langen, Henrika; Huber, Martin". There are buttons for "Access options" and "Download".

A) Saving more records at the same time:

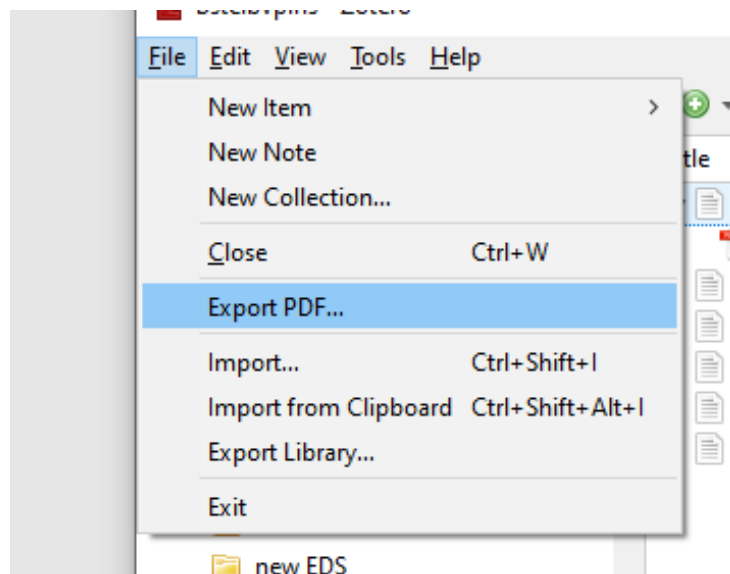
After making a search click on Connector (the icon changes to a folder), from pop-up window choose the documents you want to download.



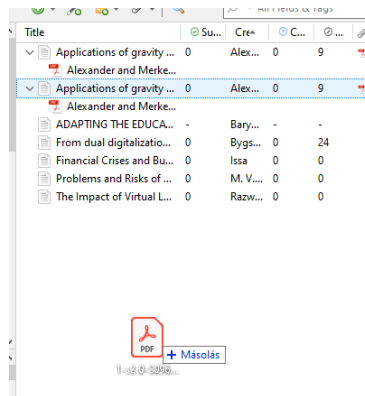
Alternative ways to download documents from SuperSearch

A) Downloading the pdf, retrieving metadata

1. download pdf to desktop, export to Zotero: File/Export PDF or



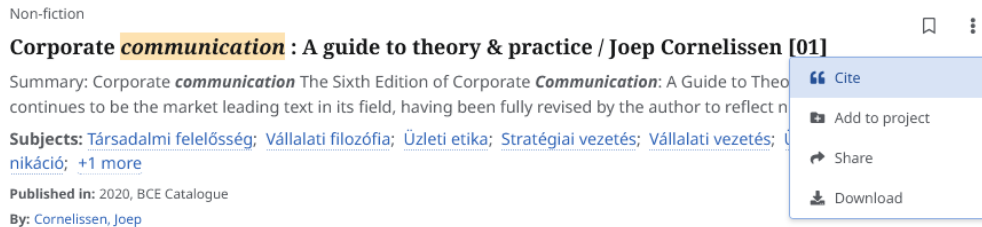
2. drag and drop pdf into Zotero from desktop



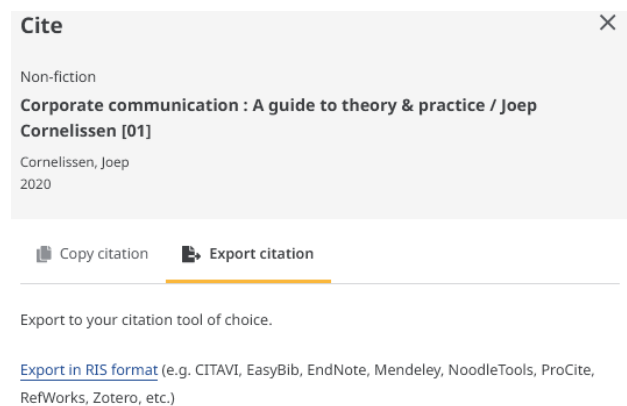
PDFs are in themselves not sufficient to insert citations, you need to have bibliographic data (metadata). Zotero has a built-in metadata finder, in most cases it can extract the necessary data from pdf files. This only works for pdfs that are so-called double-layered pdfs (most of the pdfs on the web are that type). If pdf is created by scanning from a book, it does not contain the metadata. In this case you have to enter the data manually: right click, "Create parent item.."

B) Saving individual articles as .ris-file

Next to the article: Tools/Cite



Exporting them as .ris file



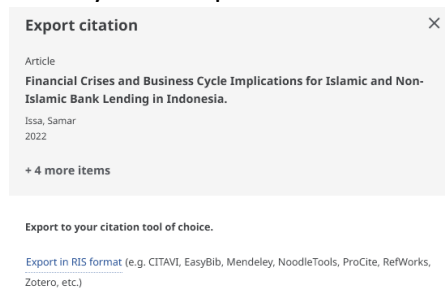
Using this method, metadata go directly into Zotero. Pdfs can be linked to them with right click/Find available pdf.

C) Saving multiple articles' bibliographic data, exporting them as .ris file

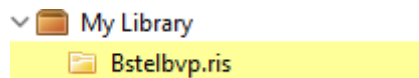
1. Save the article(s) into your Dashboard



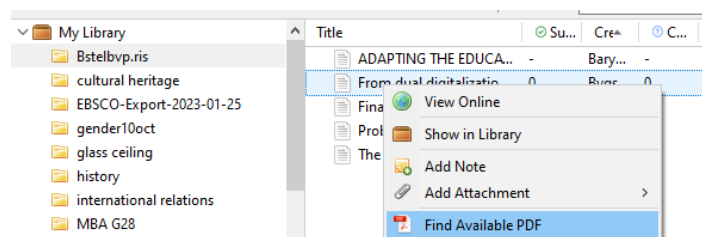
2. Export selected articles into your computer



3. Import .ris file into Zotero using File/Import. The exported file will be placed among folders, e.g.:



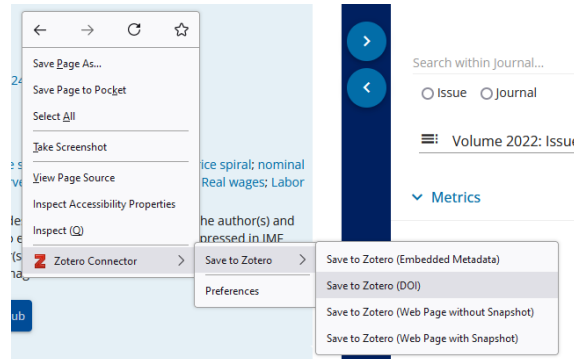
4. To access the pdf right click on the article's title, choose Find available pdf



Troubleshooting

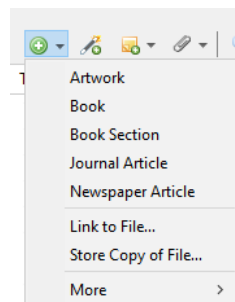
A) If Connector fails

1. right-click on the page, Zotero, select the form you need:

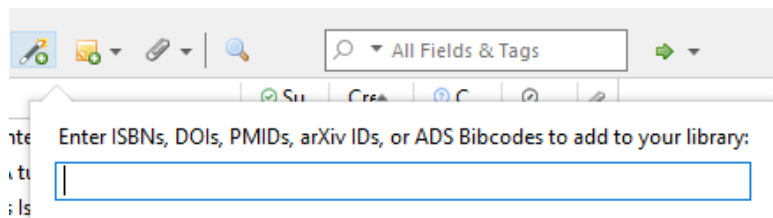


B) If all else fails: manual data entry

In Zotero, click on the little green plus icon, select the document type you need and fill in the data in the right-hand column:



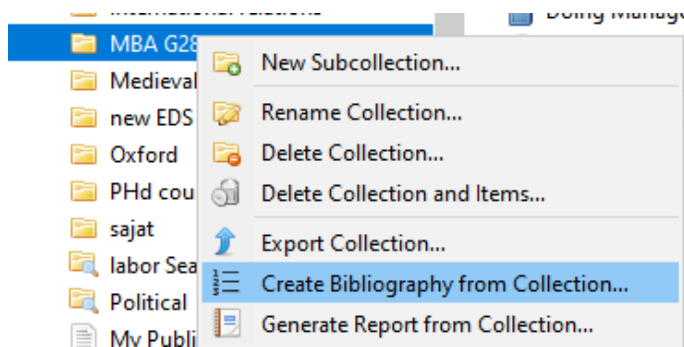
If you click on the next icon (Add item(s) by Identifier), Zotero will search for ISBN, DOI, or any other ID and in most cases finds the metadata and loads the required document (useful for print books):



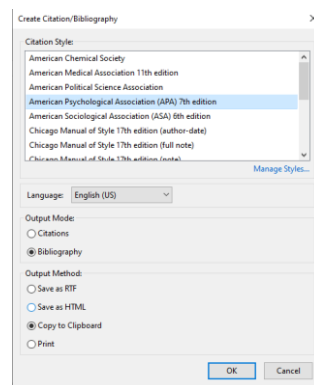
Creating a Bibliography

1. If you were making a bibliography of a collection:

Right click on the collection's name, 'Create bibliography from collection':



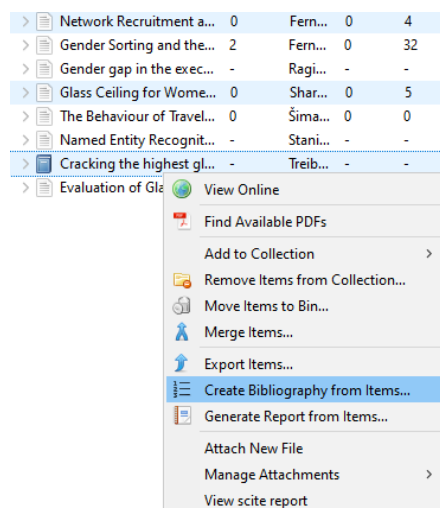
In the pop-up window, select the required reference style, tick Copy to clipboard option and OK:



Open a word processor, CTRL+V to insert the bibliography.

If some of the items in the collection were to be made into a bibliography:

Select them (using CTRL), right-click, "Create bibliography from items", then the previous steps: style selection, copy to clipboard, CTRL+V.

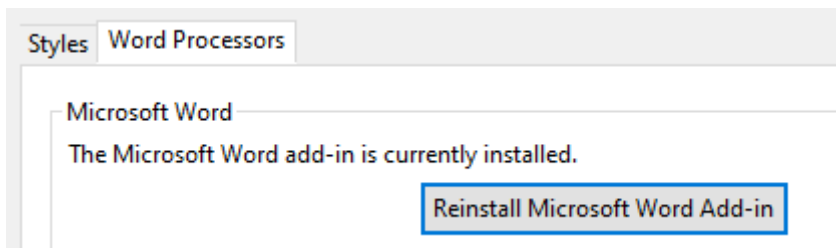


Cite-while-you-write plugin (inserting citations while writing text)

With this plugin you can insert citations while writing your paper. First, check that the word processor includes the Zotero tab.



If not, reinstall it: Zotero, Edit/Preferences/Cite/WordProcessors/Reinstall



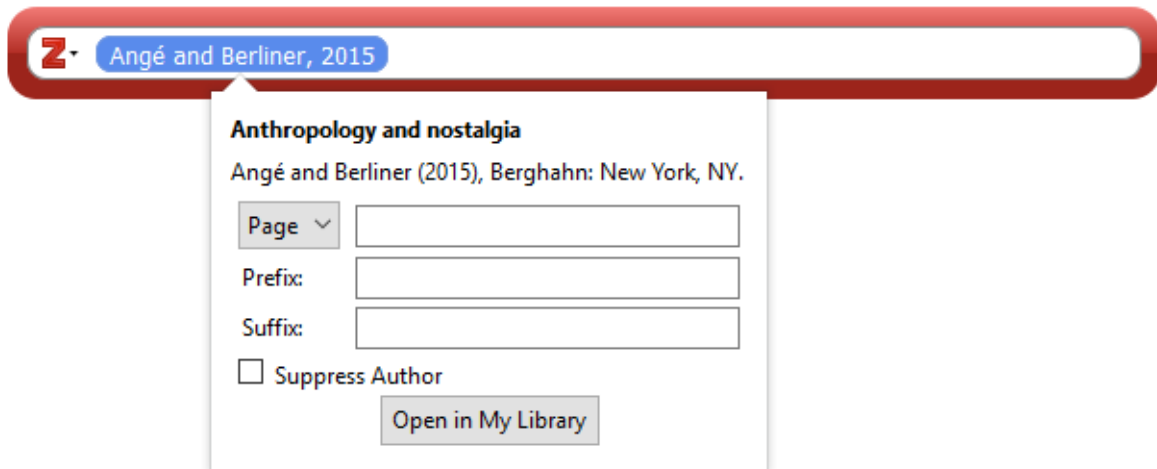
Start writing your paper, if you need a citation, click on the first icon (Add/Edit Citation), select the citation style, then OK:

- a) A red oval bar appears. Here you can enter the words that appear in the documents you have saved, all of which contain the characters you have entered.



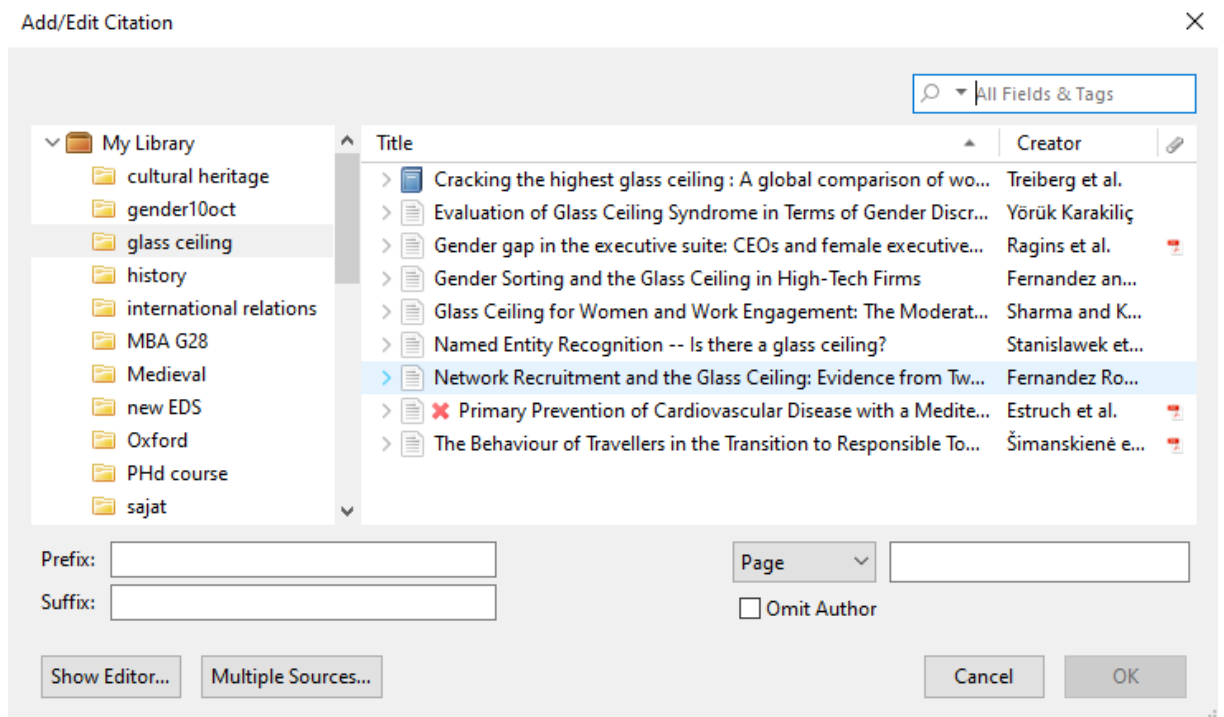
Select the one you want to use, Enter and it's pasted. If you want more than one quote to go in the same place, do not press Enter after selecting the first, but type another word, find the citation you need, press Enter.

To insert page number, before pressing Enter click on the quote, a pop-up window appears, enter the page number.



Once you have all the necessary citations, click on the 3rd icon - Add/Edit bibliography - to insert the bibliography. All references used will be included.

- b) If you can't remember the documents you've saved, when the red oval bar appears, click on the little triangle next to the letter Z letter, then click on Classic view. Result:



You can also select the documents you need from here. If you need more on the same place, you can set them by clicking on More sources.

Other icons:

Document preferences: Here you can change citation style at any time during and after the editing process. To do this, simply click on a pasted citation and select Document preferences - new style.

Refresh: if you modify data in Zotero (adding more authors, change the year of publication, etc.) and you have already used the changed document, clicking on the refresh button will display these changes.

Unlink citations: Zotero uses codes to insert citations. If you click on this button, the connection between Zotero and the document will be broken, preventing, that your references or bibliography being automatically updated later. **Caution: the process is irreversible!** Only use it when you are completely ready and you are sure that you no longer want to revise the document.

Registration and Synchronisation

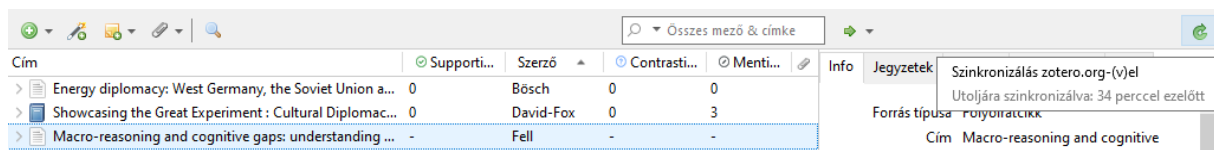
The benefits of registration are:

1. Saved documents are also stored in the cloud, so if you replace your computer your data won't be lost.
2. You can create group libraries.
3. Synchronisation.

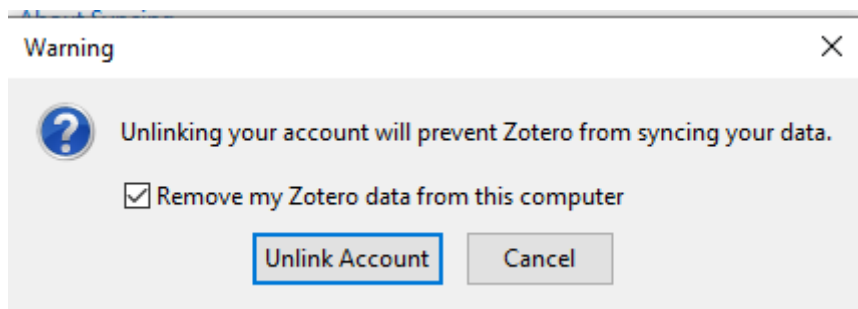
You can register on Zotero.org. You can also create group directories here by setting permissions (read, edit, open/close group, etc.)

Synchronisation: very useful if you use a common computer (e.g. pcs in reading rooms).

- Record login data you entered when registering in the software: Edit/Preferences/Sync, Data Syncing You can also make here several minor settings: e.g. sync fulltext, only individual directories, auto-sync, etc.
- When you're done, click the little green arrow in the top right corner and your freshly saved documents will be stored in the cloud (you can also make this automatically by setting the sync option).



Important: if you are using a machine that is used by others (e.g. a reading room), you should log out of your account after synchronisation and delete your documents from that machine: Settings - Sync - Unlink account - tick the box in front of "Remove my Zotero data from this computer" - Unlink account



More information:

https://www.zotero.org/support/quick_start_guide