

## Managing references with ZOTERO – a short guide

ZOTERO is a free software for MacOS, Linux, IOS and Windows from the Roy Rosenzweig Center for History and New Media (George Mason University). It has been designed to assist scientists with gathering, sorting and reading research materials, extracting information, quotes, and citations, making it easy to create proper citations in MS WORD, and generating a complete bibliography with a single click.

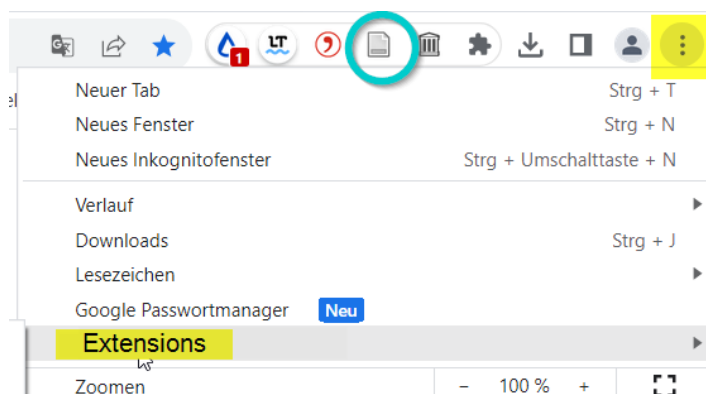
### Download and installation

Download the appropriate version of **Zotero** for your computer (<https://www.zotero.org/download/>) and install the program on your device. In addition to the program file, you also need the browser add-in "**Zotero Connector**" (on the right), which is available for Google Chrome, Mozilla Firefox, MS Edge and for Safari. The IOS-version is available in the App Store: <https://apps.apple.com/de/app/zotero/id1513554812>

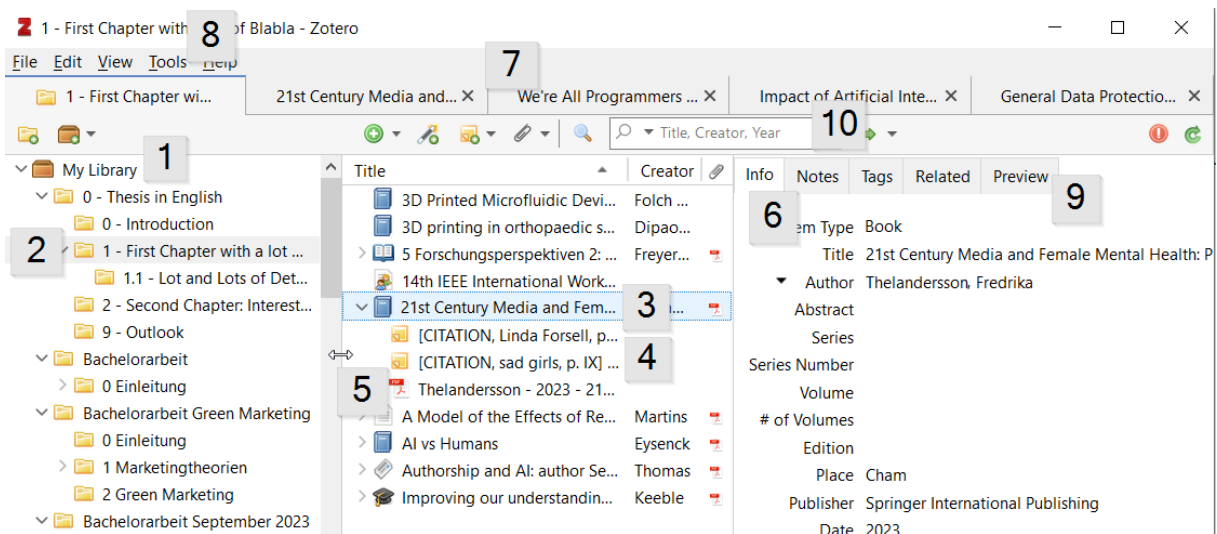


### Activate the browser extension “Zotero Connector”

Go to the **extensions menu in your browser** and set the Zotero Connector bar to “active”. Your browser now sports a new icon in the vicinity of the search slot. On some computers the Connector self-installs after downloading.



## Open Zotero: The Zotero interface in a nutshell



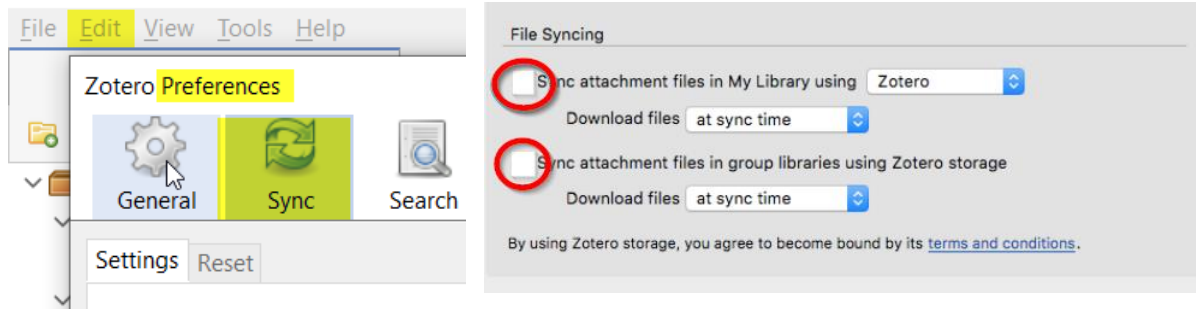
1. **My Library:** Contains all the references you collect in one long list
2. Folder-style **Collections and Sub-collections** created by you to sort your references (by outline, by subject, by item type... The titles list in the middle window displays the references of the chosen collection (or the whole library)
3. Single **item** – the icon on the left shows the item type (“book”). The PDF icon on the right indicates an attachment (i.e. the respective e-book)
4. **Citations** extracted from the item in the form of “Notes”
5. **Attached file** (i.e. the paper or book or table of contents)
6. Info: **Interface to edit the bibliographic information** of the item / book
7. Attachments opened in integrated **document viewer**
8. **Main menu** (Preferences etc.)
9. **Preview:** Preview of bibliographic entry in chosen style (Plugin needed: <https://github.com/dcartertod/zotero-plugins#zoteropreview>)
10. **Search** for titles, authors, tags in your entire Zotero library

## Quite unnecessary: Online account and syncing

Now and then Zotero will prompt you to set up an account online and start syncing your references.



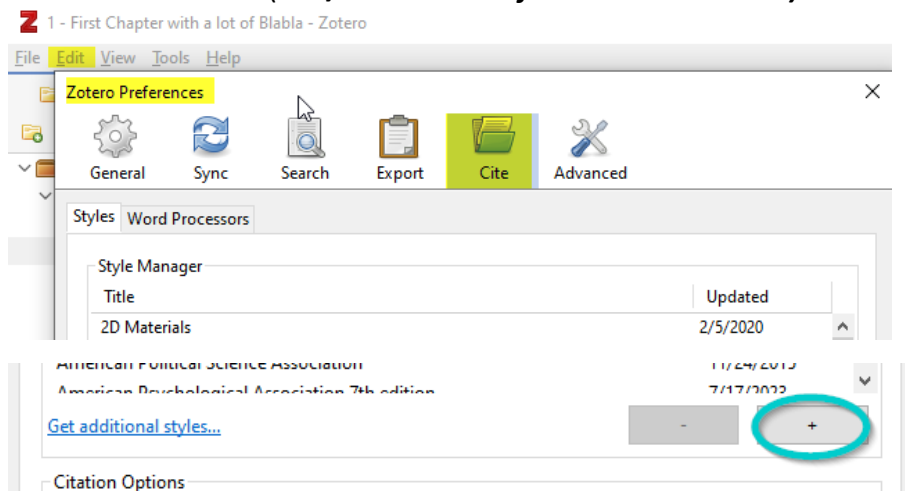
In our experience maintaining a Zotero web account is quite unnecessary – unless you tend to switch computers regularly while working on your paper or you are researching as a group. A Zotero account does not cost anything, **but free storage is limited to 300 MB**, which might just do for a short report. A sensible workaround might syncing just be switching off the syncing of attachments: **Edit/Zotero → Preferences → Sync → File Syncing**. Bibliographic records by themselves do not use much storage.



### Up to you: Import a FH Aachen Citation Style or browse the Style Repository

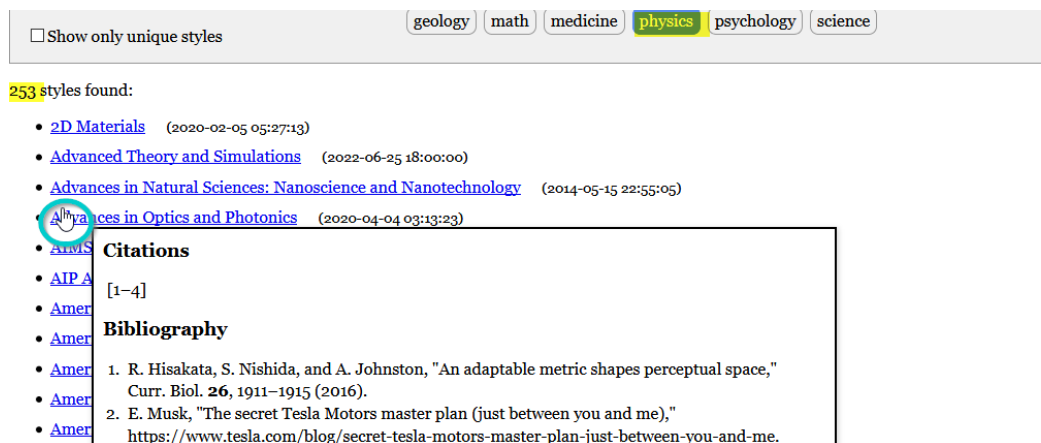
If you are a member of FB2, FB7 or FB8, the library has **programmed Zotero citation styles** that generate citations and bibliographies according to your department’s guidelines. You need to download the respective **file** (and the accompanying instructions: “**Read-Me...**”) from: <https://www.fh-aachen.de/fh-aachen/hochschulstruktur/zentrale-betriebseinheiten/bibliothek/literaturverwaltung/literaturverwaltung-mit-zotero>

You add the style to Zotero by clicking on the “Plus button” in the “Cite” panel of the “Zotero Preferences” menu (**Edit/Zotero → Preferences → Cite → +**)



When the style appears in the Style Manager List, you can select it to be applied.

Alternatively click on “**Get additional styles**” (next to the “Plus button”) and hover with your mouse pointer over the links (there are more than 10.000 to choose from) to get a preview:

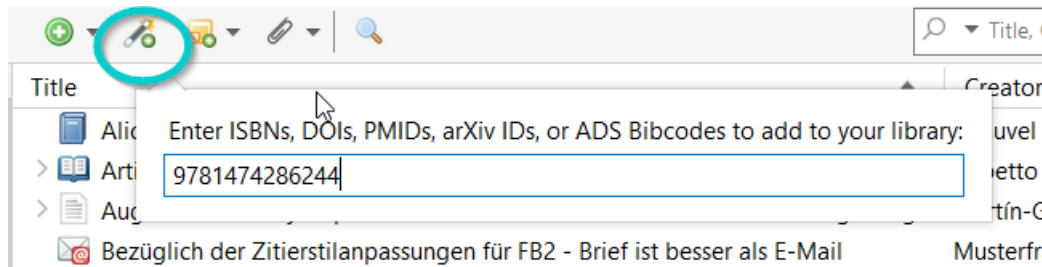


Collecting references  
Zotero offers vari-

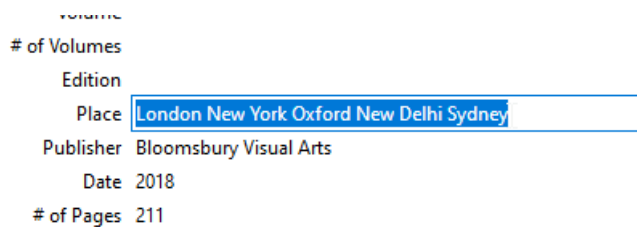
ous possibilities to import literature references from databases, library catalogues, the WWW and handwritten lists in an uncomplicated way and without extensive typing.

### Importing bibliographic data by Magic Wand.

If you know the **ISBN**, DOI or PMID of a book or article, you can use this standard number to trigger an automatic data retrieval in preselected catalogues (WorldCat, K10plus) and directories (CrossRef, Google Scholar).

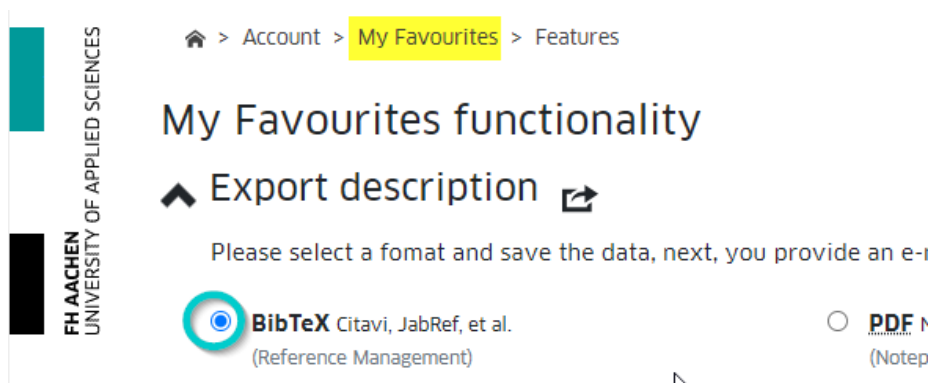


Always keep an eye on the data the magic wand delivers (pane on the right) and compare it to the item or the source. If you notice mistakes or discrepancies, **edit the fields** right away to ensure your later bibliography will be correct:



### Mass-importing bibliographic data from favorite lists (e.g. as .ris, .bibtex ...)

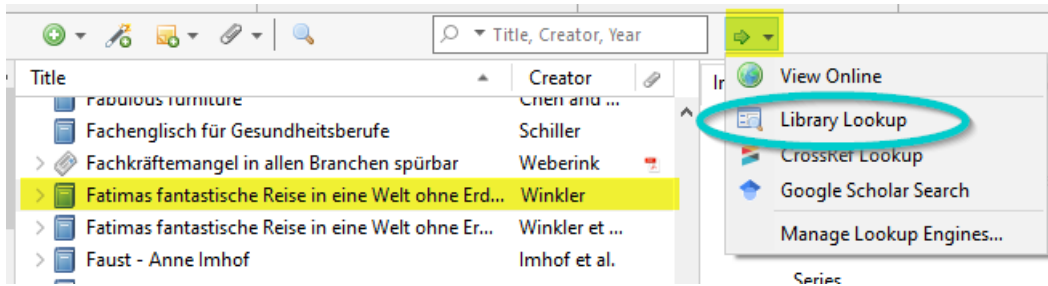
Many catalogues and databases offer the **export of complete favourites lists** and search results. Zotero can read and correctly process the following file formats: RIS, BibTeX, MAB2, MARC and MODS. Save your favourites list in CataloguePLUS or other databases as .RIS or .BibTeX and open the downloaded file with Zotero.



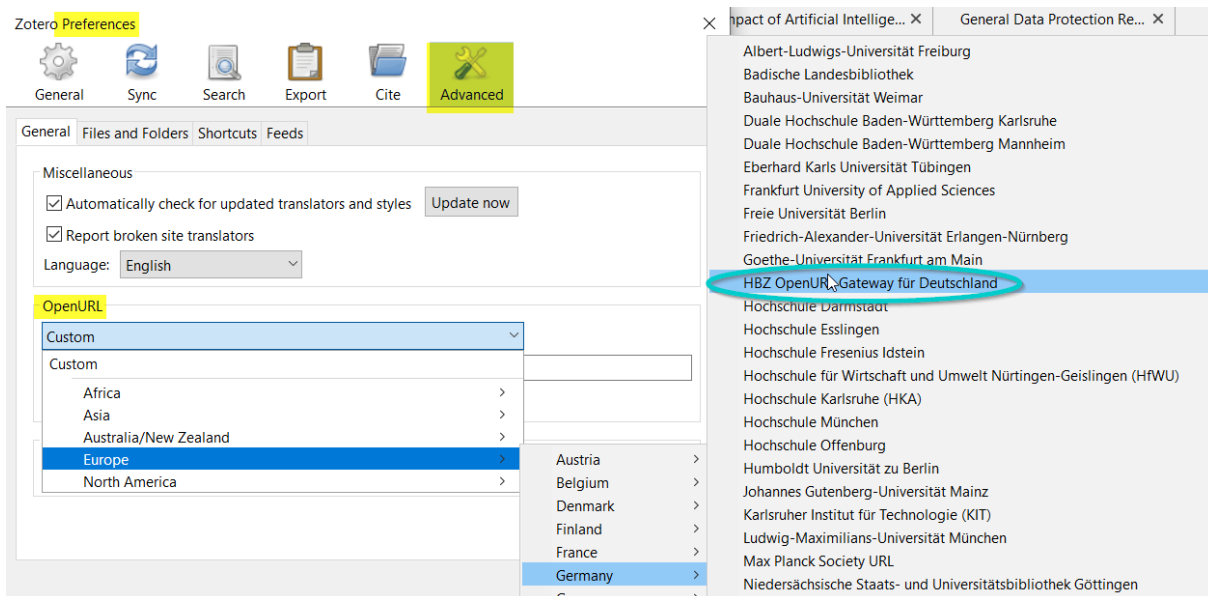
Make sure to take the time to double check and **edit the imported data** to avoid mistakes in your bibliography. If the list of items is quite long, you can create a temporary collection to store the import so you know which titles to polish.

The disadvantage of list imports is that **only the catalogue record** (bibliographic data) is included in the .ris or .bibtex file: Library call numbers and e-books have to be gathered in a second step:

If you want to make use of the **“Library Lookup”** function (mark an item und click on the green arrow above the editing screen) ...

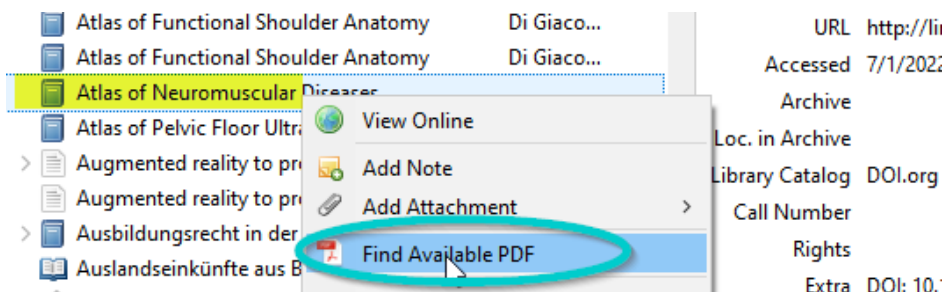


... you should set up the correct lookup engine (libraries in NRW) in the “Advanced” panel of the preferences menu first. It is quite easy:

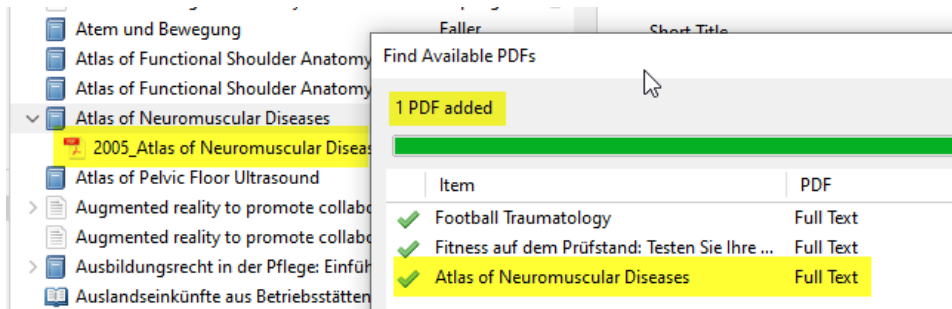


**Edit/Zotero → Preferences → Advanced → General → OpenURL – choose: Europe → choose Germany → choose “HBZ OpenURL Gateway für Deutschland”. That’s it!**

If it seems likely that the library or database offers an e-book or a paper for download, you **right-click** or **ctrl+click** on the title in the items list and click on **“Find Available PDF”**. Don’t forget to activate BIB-VPN first to download licensed content.



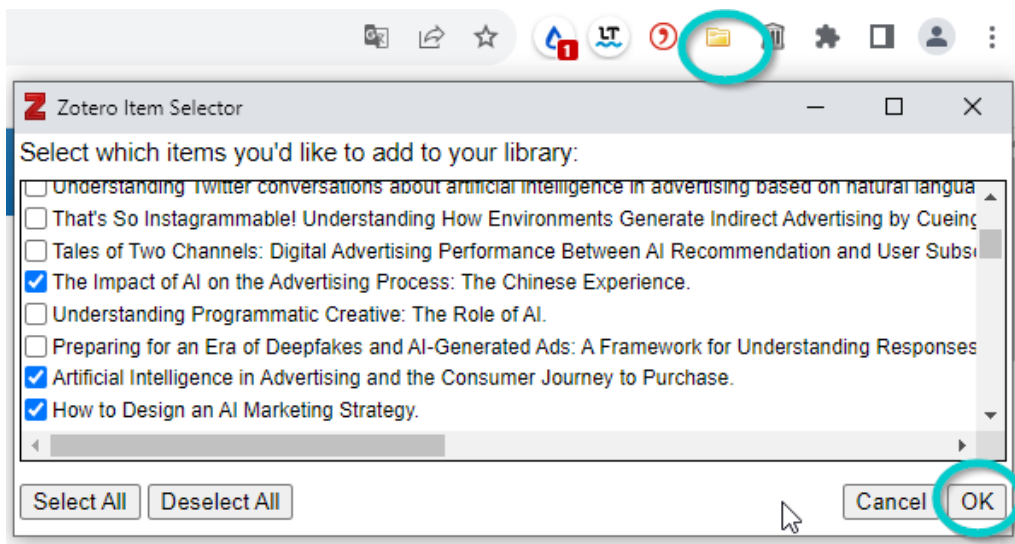
If a PDF is available to you, Zotero downloads it and adapts the file name.



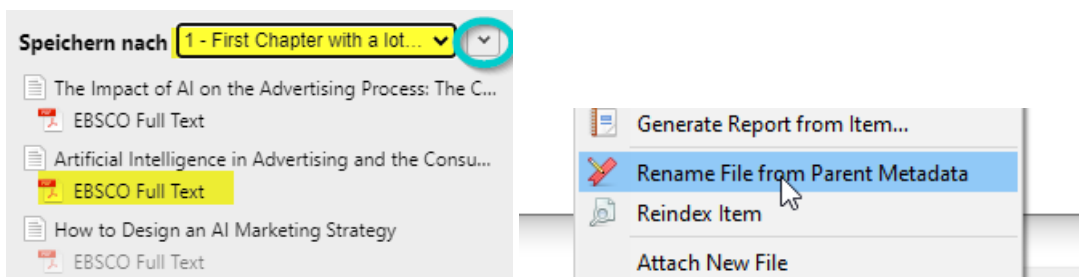
### Picking up data and documents with Zotero Connector

In most cases, you don't need to create and save a favourites list at all. After all, you have the Zotero Connector activated in your browser. CataloguePLUS is not Connector-compatible, but a lot of databases are.

The Zotero Connector icon changes shape and colour depending on how many and which types of importable items have been detected. **Just click on the icon**, if you want to save what you see in your library.

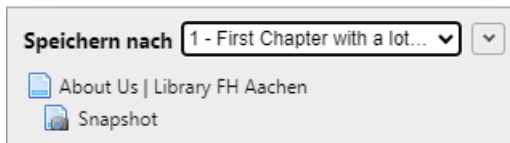


Connector saves the bibliographic records and picks up fulltexts of documents on the go. You can change the destination in the pop-up window to a different Zotero collection. Tip: Make use of the **“Rename File”** function after saving (right-click or ctrl+click on PDF).



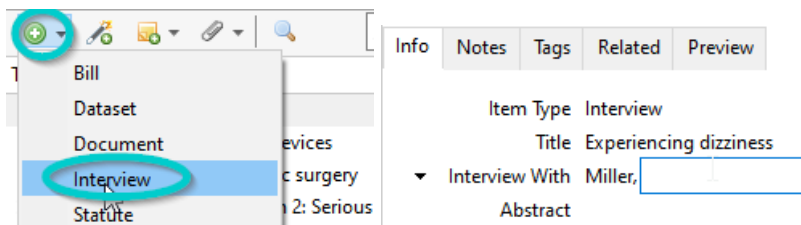


When you select a webpage or blog entry to be saved, Connector automatically files away a “**snapshot**” in HTML format for you, since the internet is rather ephemeral.

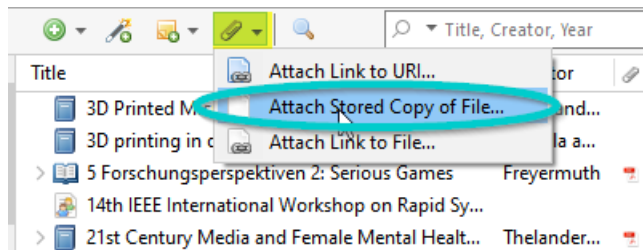


## Manually entering references (Green Plus)

If you need to reference material, which isn't part of any accessible database (i.e. interviews conducted by yourself, correspondence etc.) or material which doesn't transfer satisfactorily by Connector (statistics by statista.com or some technical standard), you simply **catalogue them by hand**. When you click on the “**Green Plus**”, you have to select the correct **item type** (i.e. letter, interview, document, bill) and fill in the necessary fields.

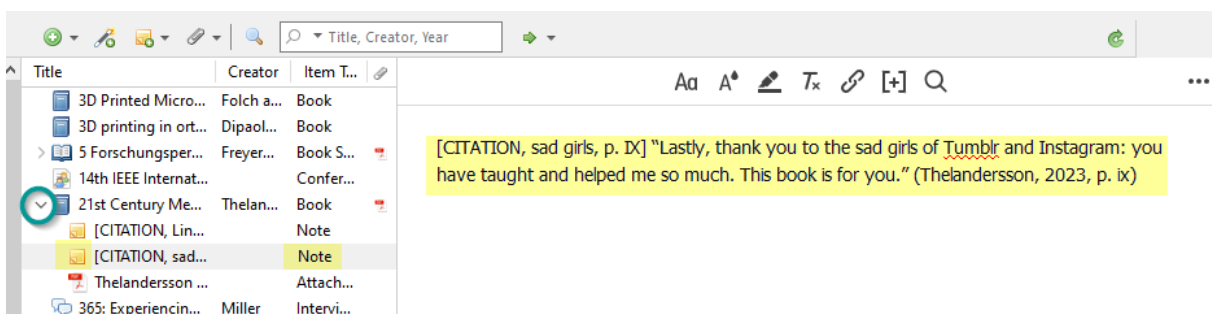


If you have a digital version of the document at hand, attach it to the record by clicking on the paper clip icon and selecting “**Attach Stored Copy of File**”.

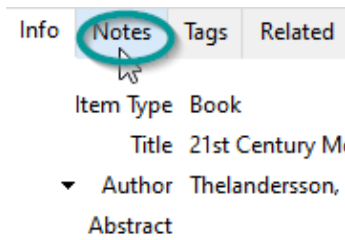


## Reading, extracting quotations and preparing citations for later use in MS WORD

Quotations and paraphrased opinions / facts from titles in your Zotero library are saved as “**Child Notes**” and can be accessed by clicking in the fold-out icon next to the title

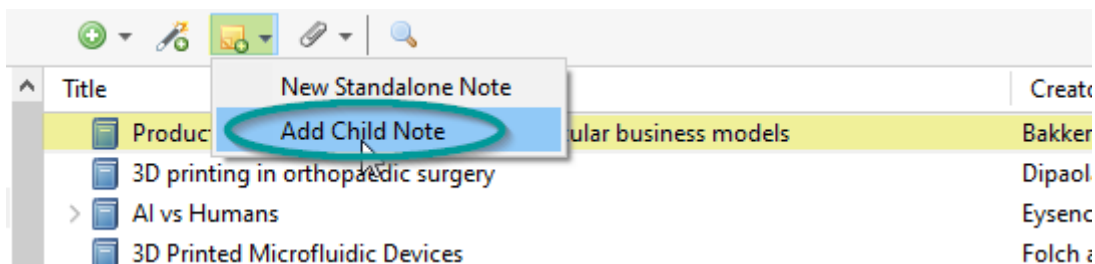


or by selecting “Notes” in the title editing pane:

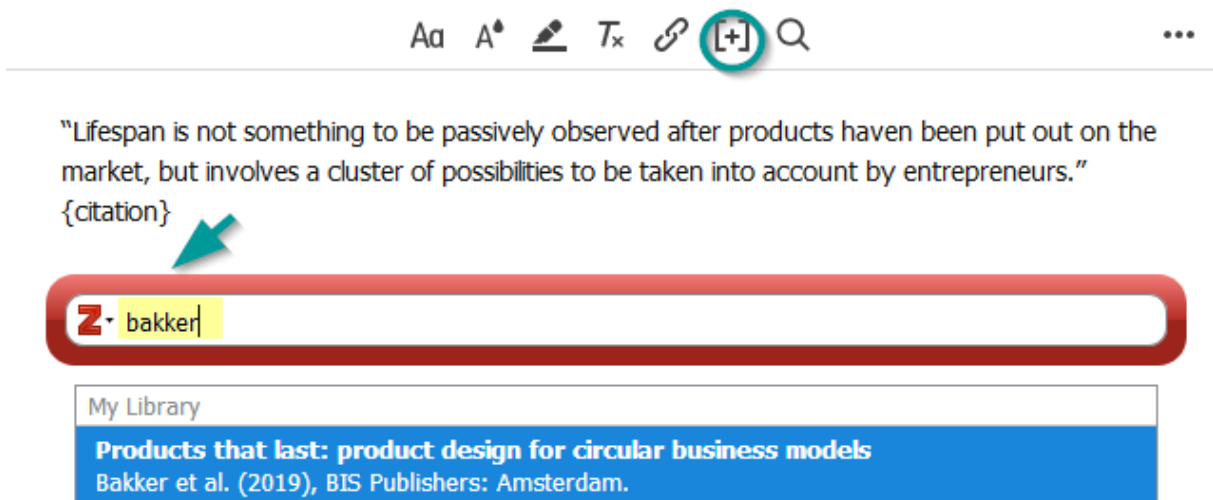


Quotations from printed sources or files that are not attached to a Zotero title or passages you've paraphrased

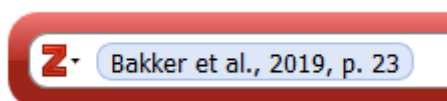
Mark the title you want to create a note for, click on the yellow note-shaped icon on top of the title list pane and select "Add Child Note".



Although the note is already a child note and connected to the title, you need to **insert a citation** for later use in WORD. Click on the **icon [+]** in the note editing window. In the now appearing floating window search for author or title, select the result ...

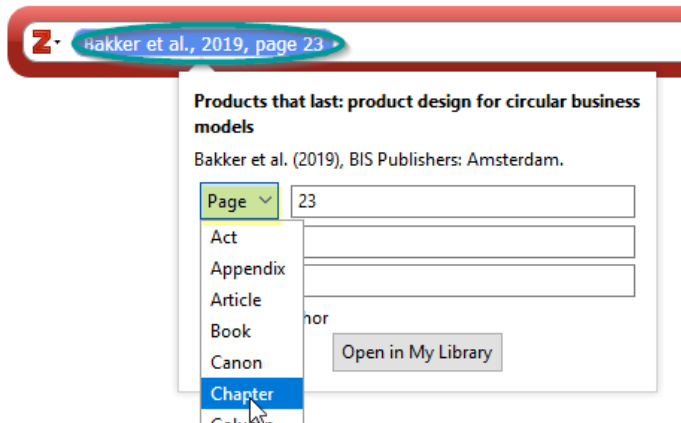


...and write the **page number** – just the digit, i.e. 23, directly into the red box. The "p" will add itself:



If your source does not count in pages, select something else after clicking on the citation in blue ("edit-citation" function):





To ensure a better organization later in WORD, we suggest adding something right at the beginning of the note that helps you recognize it in a long list of notes. For example

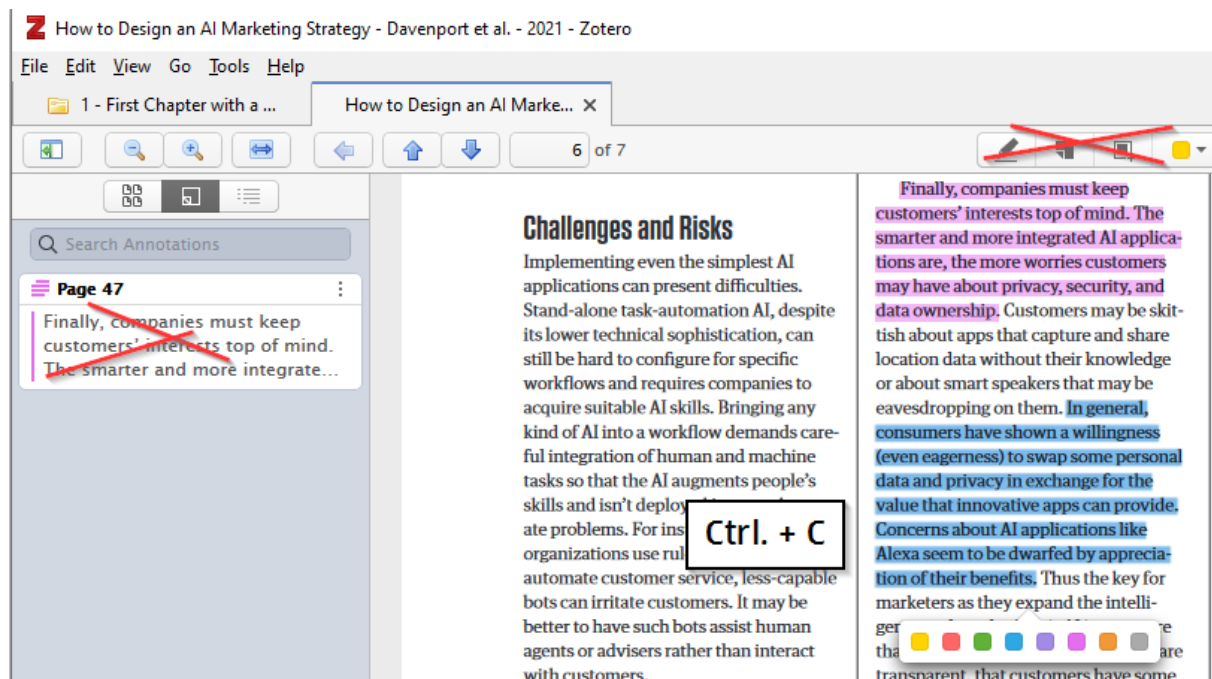
[CITATION, Bakker, lifespan] “Lifespan is not something...” or

[Chapter 1.1, CITATION, Bakker] “Lifespan ...”

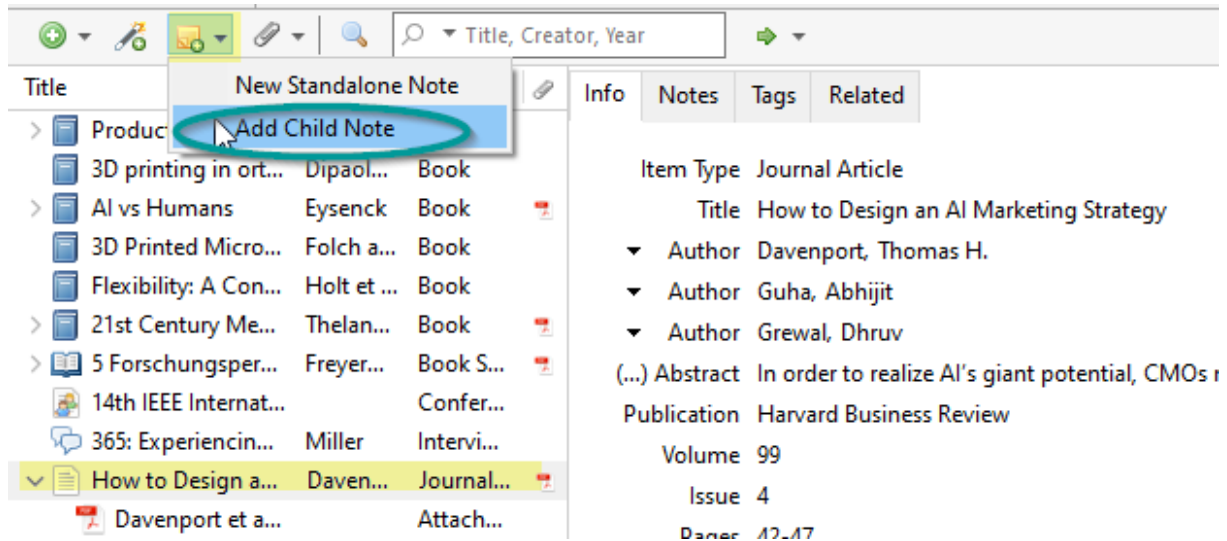
But that is something you can do or skip. It’s up to you.

### Quotations copied from Zotero Document Viewer

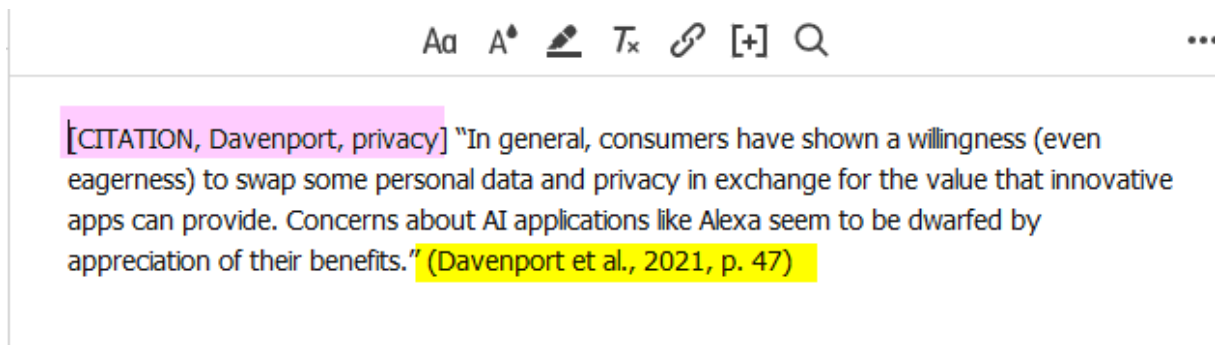
If you click on a PDF attachment in the titles list, it will open in Zotero’s Document Viewer, which remains open as a new panel next to the main window until you close it. The Document Viewer offers several tools to work with the document itself (highlighting, note taking etc.). Gathering quotations as Zotero notes works best, if you **copy** them using your keyboard **[ctrl + C]**.



Skip back to the main window, click on your title (instead of the attachment) and “Add a Child Note” via the yellow note icon on top of the title list and **[ctrl + P]** of your keyboard.

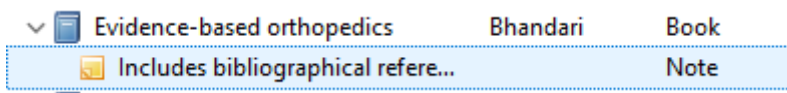


Since the PDF is open in the Zotero Document Viewer, the citation - including the page - is automatically included:



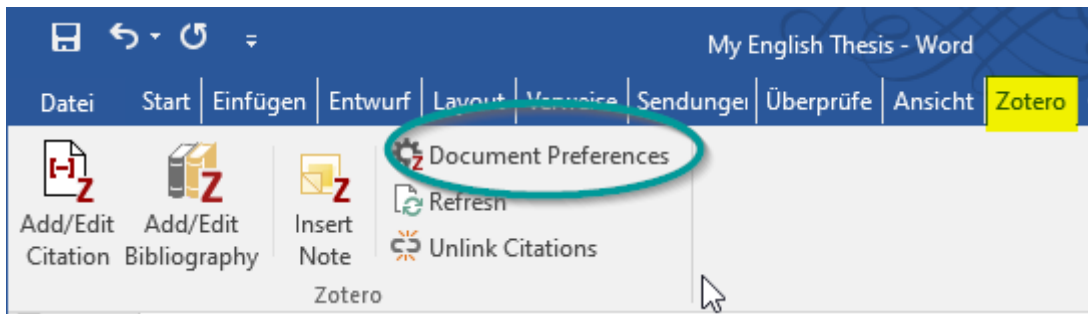
We added the pink annotation in brackets for organizational reasons: It is sometimes easier to pick out the correct note in WORD, if its beginning is easy to distinguish. Another good idea is putting the later chapter number of your paper in front: [1.1., CITATION, Stitch Fix].

Sometimes Zotero Import creates its own notes with information that do not fit anywhere else. It makes probably sense to delete them. But if "real notes" are prepared for easy recognition, you won't be irritated by the rest.



## Adding Zotero references and notes to your WORD document

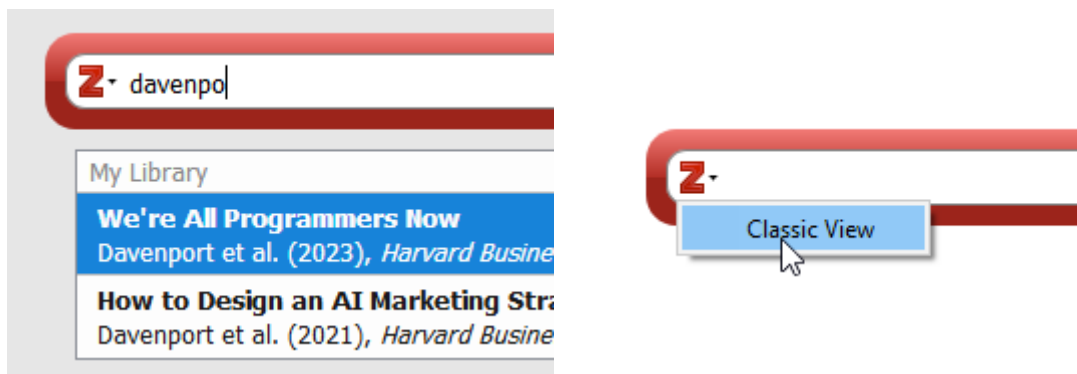
When you open WORD, you should find an additional menu option labelled Zotero. Select "Document Preferences" to select a Citation style from the ones you set up in Zotero earlier.



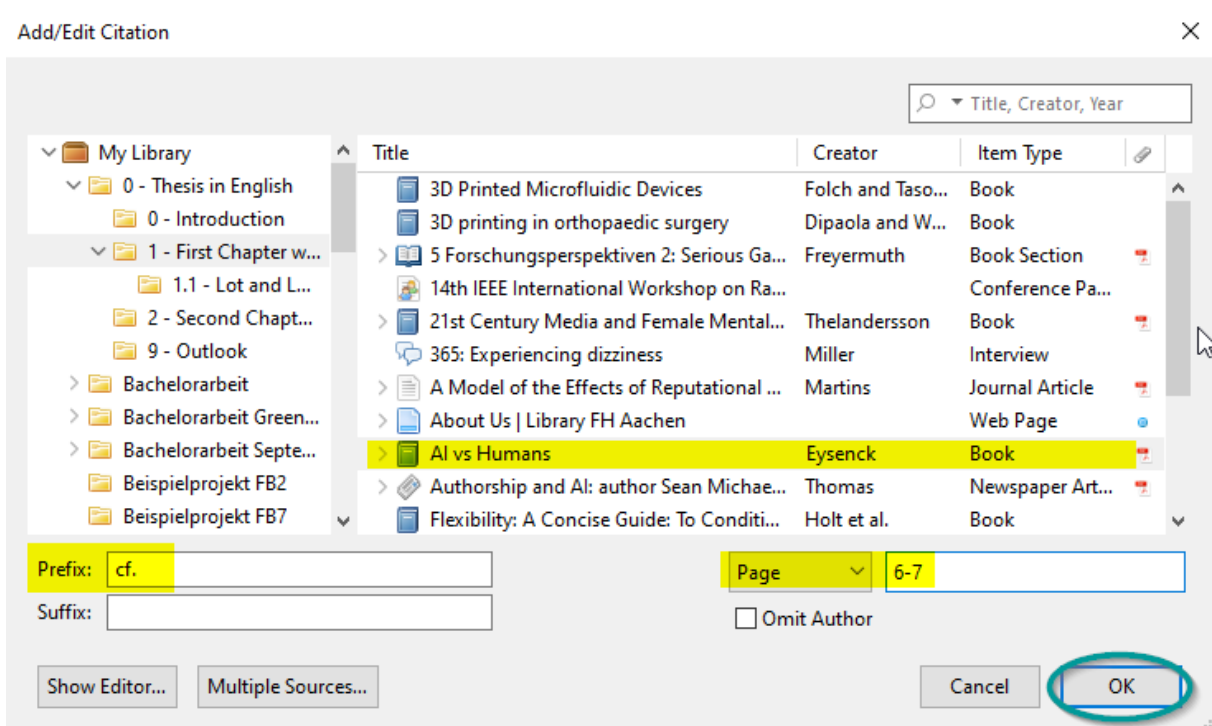
Now you can add either references to titles in your Zotero library (“Add / Edit Citation”) or you can add Zotero notes (“Insert Note”).

### Adding references

Adding references can either be done by searching for author or title in the **floating search bar** or by clicking on the red “Z” to browse via **“Classic View”**.



“Classic View” is a Mini Zotero window. You select the source and, if necessary, complete your reference with pages and a prefix.



Depending on the citation style, Zotero creates either a footnote or an in-text citation. For example

- 1.→First-Chapter-with-a-lot-of-Blabla¶
  - 1.1.Lots-and-Lots-of-Details-¶
- ¶
- gdgdfdfdfedgedgdfdf, as stated by Eysenck [EYS-21], hfhgfgdgdgdfdf¶

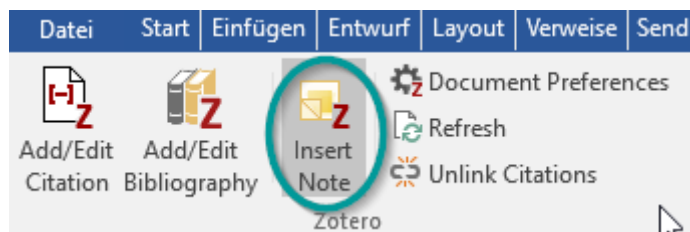
or

¶

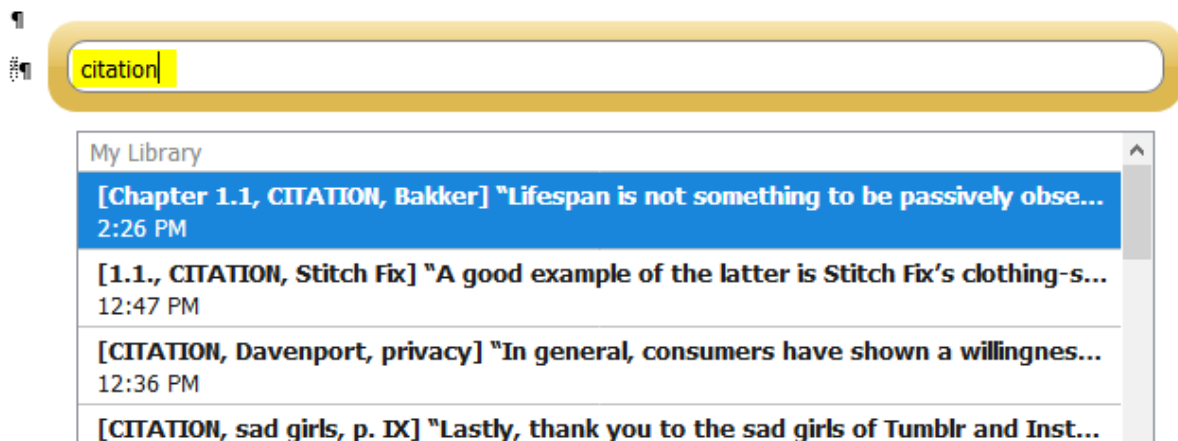
cf. Eysenck, M.-W.; Eysenck, C., 2021 pp. 6–7.¶

### Adding Notes (Quotations)

Select “**Insert Note**” in the Zotero menu to copy i.e. a quotation including the citation from your Zotero library into your WORD document.



You can either scroll through all of your notes with the most recent on top, or you can enter keywords to find the note you need.



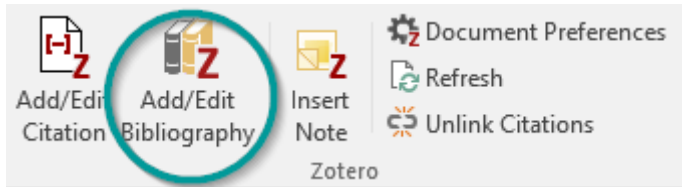
Delete the annotation in brackets (if you had added one). The Zotero citation has transformed itself into a footnote or in-text citation, depending on the Citation style you use.

¶

~~[1.1., CITATION, Stitch-Fix].“A good example of the latter is Stitch-Fix’s clothing-selection-Al, which helps its stylists curate offers for customers and is based on their self-reported style preferences, the items they keep and return, and their feedback.”~~¶

## Adding a Bibliography / References list

You can insert your bibliography whenever you feel like it. If you do *not* use the “Unlink Citations” function, the list will grow as you add more and more citations and notes. Just place your cursor where you want the reference list to go and click on “**Add/Edit Bibliography**”.



It will look maybe like this (Citation Style *FH Aachen, FB7, Business Studies, English*):

Bakker, C. et al., 2019, Products that last: product design for circular business models, 1st ed., BIS Publishers, Amsterdam.

Davenport, T. H.; Guha, A.; Grewal, D., 2021, How to Design an AI Marketing Strategy, in: Harvard Business Review, 99, 4, pp. 42–47.

Eysenck, M. W.; Eysenck, C., 2021, AI vs Humans, Routledge, London.

or this (Citation Style *FH Aachen, FB8, Maschinenbau, Kurztitel*)

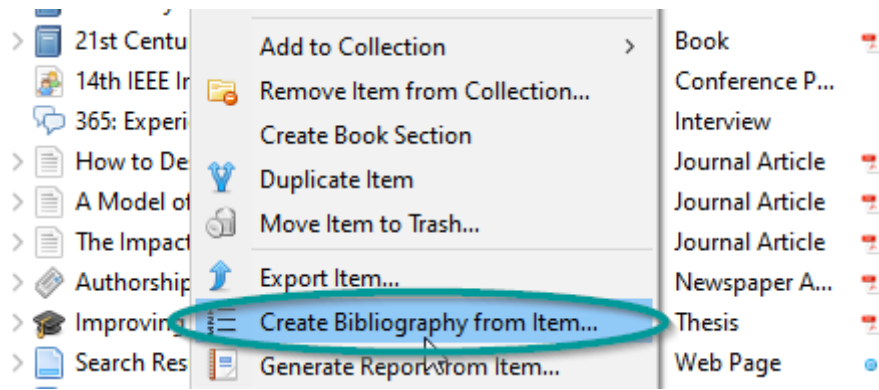
[BAK-19] Bakker, Conny; Hollander, Marcel; et al.: Products that last: product design for circular business models, 1. Aufl., Amsterdam , BIS Publishers, 2019

[DAV-21] Davenport, Thomas H.; Guha, Abhijit; et al.: How to Design an AI Marketing Strategy, In: Harvard Business Review, 99 (2021), H. 4 , S.42–47

[EYS-21] Eysenck, Michael W.; Eysenck, Christine: AI vs Humans, London , Routledge, 2021

## Generating a bibliography with selected titles directly in Zotero

If you just need a quick reference list in a certain citation style, mark the titles you want to include and **right-click / ctrl+click** to access the context menu, where you can select the option “Create Bibliography from Items”.



As a next step, Zotero will ask you to select a style. Do that and checkmark “Copy to Clipboard” or “Print”. Voilà. You have something presentable!