



Reference Management with Zotero

All Exercises

2023-06-05

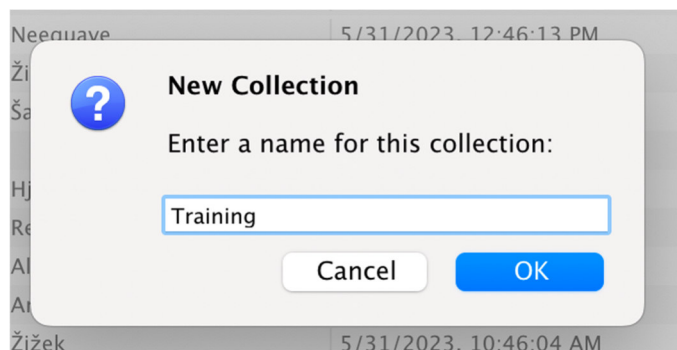
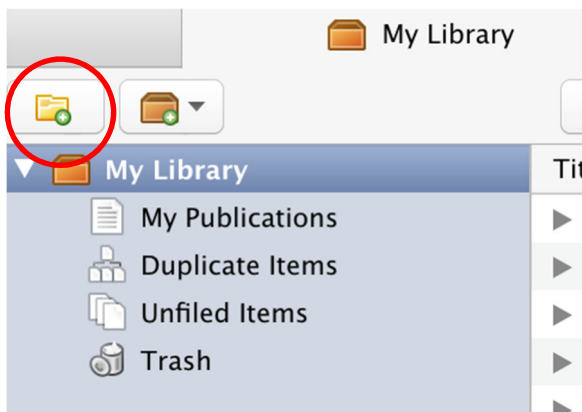
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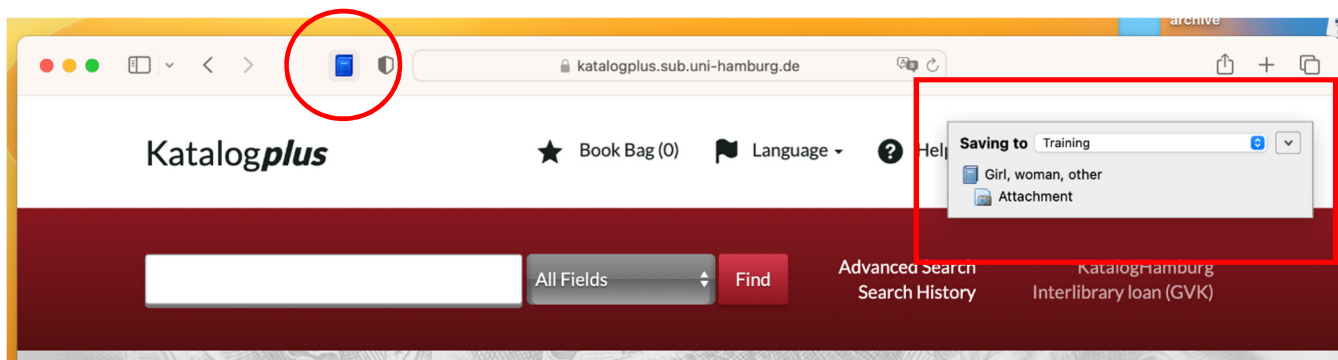
Collect References

1: Import Item from Katalogplus

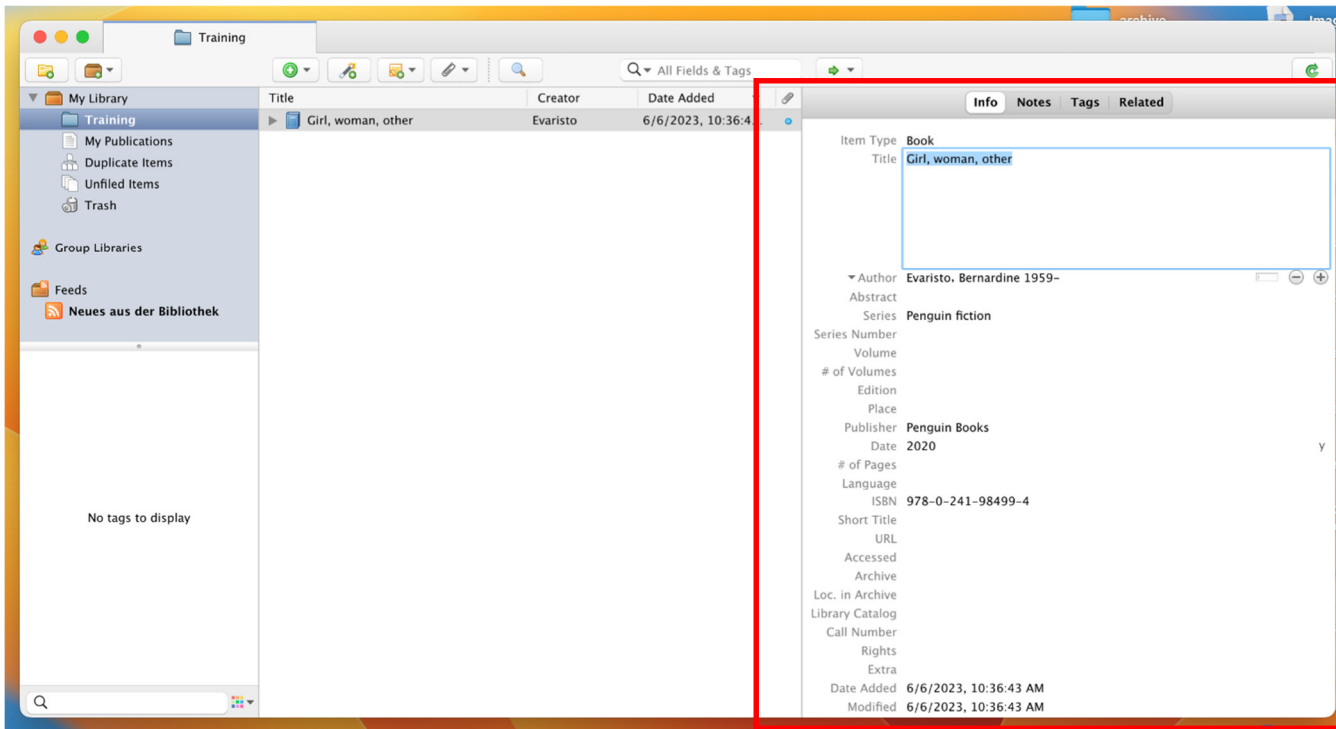
- Open Zotero
- Add a **New Collection**: Click the “New Collection” icon in the upper left corner. Give the new collection the name **Training**.



- Research the **Katalogplus** (<https://katalogplus.sub.uni-hamburg.de/vufind/>) for the following title: **Girl, Woman, other** (Evaristo, Bernadine).
- Open the item from the result list in the individual display.
- Send the title to Zotero by clicking the Zotero icon at the left of the address bar. This is the **Zotero Connector**. The import to Zotero is triggered.



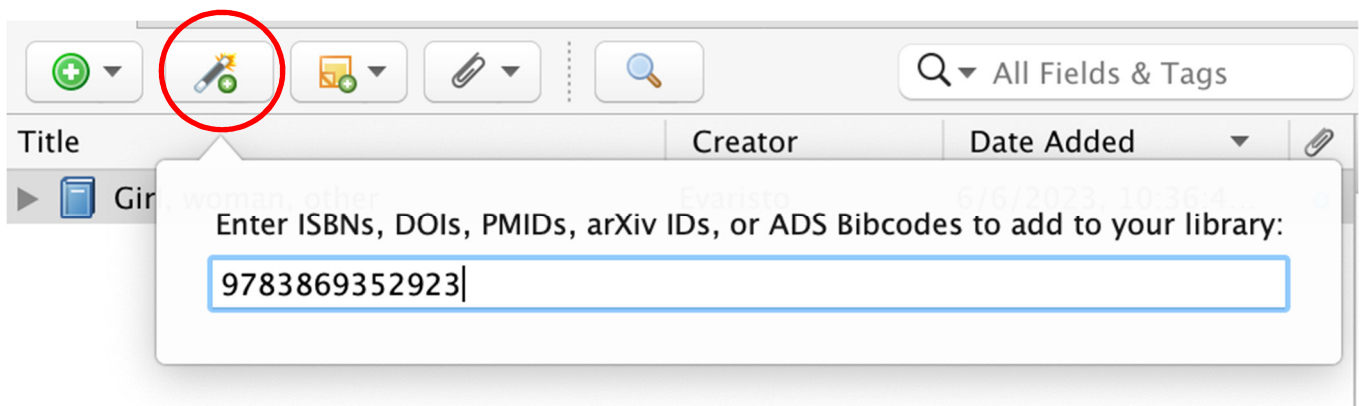
- Please check that the information in Zotero is displayed correctly in the area on the right and fill in missing information (e.g. author, title, publisher, year of publication etc):



- Search also the following publications and import them into the Collection “Training”:
 - Campus Catalogue (<https://kataloge.uni-hamburg.de/>): **Kein Kapitalismus ist auch keine Lösung** (Ulrike Herrmann)
 - Campus-Katalogue: Fundamentals of **Aircraft and Rocket Propulsion** (Ahmed F. El-Sayed)

2: Import Title via ISBN or DOI Identifier

- Click the icon with the **magic wand** (Add entry by identifier). A small window opens.



- Enter the **ISBN** or the **DOI** and press the Enter key.
- Zotero searches for the appropriate reference and imports it directly into your open project.

ISBN

- 9783869352923
- 9783658249908

DOI

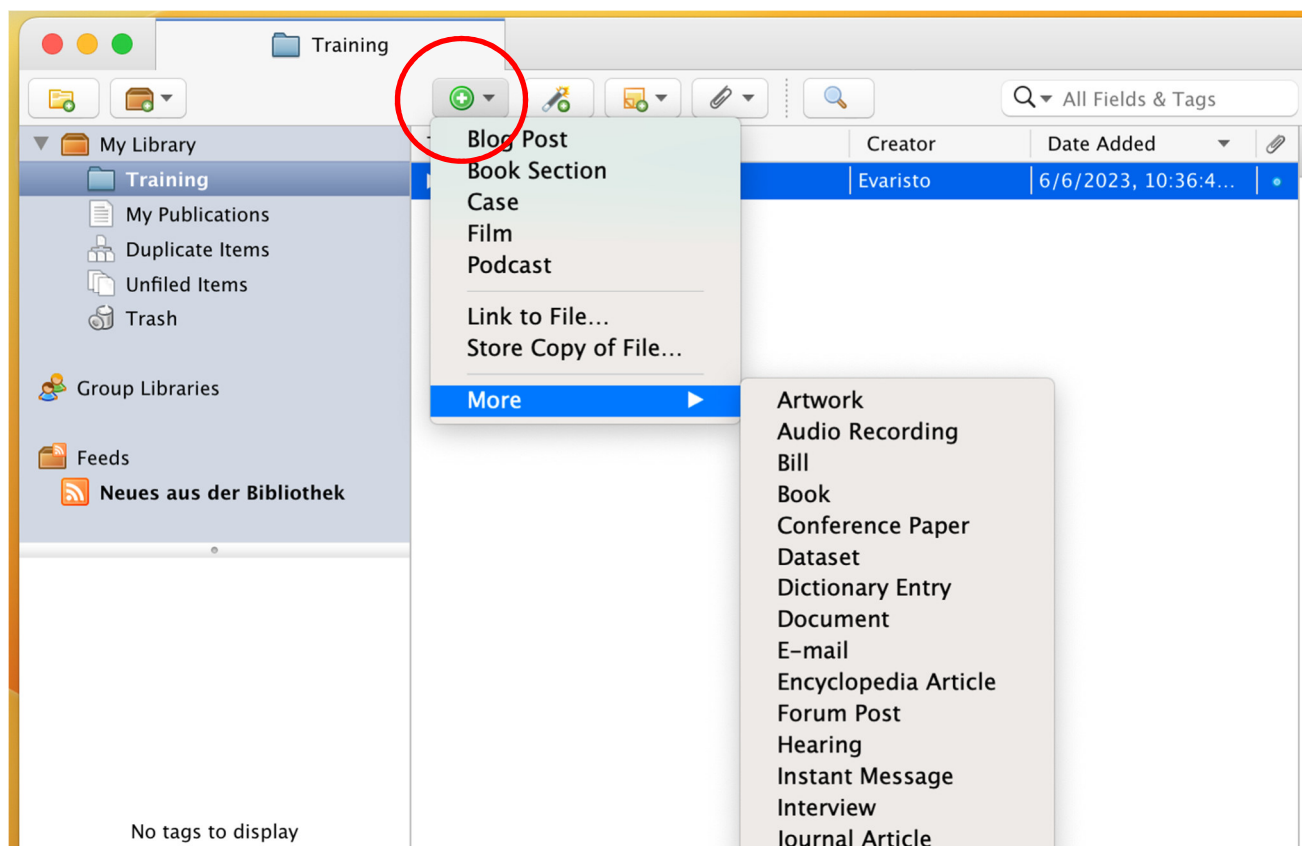
- 10.3390/ijerph15040816
- 10.1007/978-3-658-09701-1_5

3: Import PDF-Files

- Download the folder at the following URL: <https://www.wiso.uni-hamburg.de/bibliothek/service/beratung-und-schulungen/materialien/pdf-download.zip>.
- Drag and drop three PDFs into the center column of your Zotero project. If Zotero does not find all the title data, you should add the data manually if necessary.
- This allows you to save the PDF file plus metadata in Zotero.

4: Manual Entry

- Take a look at the different **item types** in Zotero. Test how the input mask changes when you select a different document type.



- Capture the following article from a collective volume. The corresponding **item type** in Zotero is called **Book Section**: GVK Plus: <https://kxp.k10plus.de/DB=2.1/PPN-SET?PPN=104651556X>

5: Database Import

Single Item

- Open **Business Source Complete** (<https://www.sub.uni-hamburg.de/recherche/datenbank-infosystem-dbis/detail.html?libconnect%5Btitleid%5D=5660>).
- Enter the search term **Brexit** and narrow the search to “**Peer Reviewed**”. Press Enter. Select an item from the list of results and open it.
- Then import the title using the Zotero connector. Ideally, the full text will be imported automatically.

Watchlist

- Go back to your result list.
- Save 3 items in your watch list by clicking the **folder icon** on the right side.
- Then open your watchlist (i.e. **Folder**) in the menu bar at the top right of the webpage.
- Select all items and export the watch list (Direct Export to RIS format) by clicking Save.
- A Zotero window appears. Confirm the import.



Normally, full texts are not imported automatically when importing a watch list. The import via watch lists works with many catalogs and databases: e.g. ABI/INFORM Collection, WiSonet, Econ-Lit, Web of Science.

Organize Refereces

6: Create Collections

- Select “**New Collection**” from the menu in the upper left corner. Create the collections like-listed below: e.g.

| Outline | Topics | Processes |
|--------------|---------|---------------|
| Introduction | Topic 1 | Get full text |
| Chapter 1 | Topic 2 | Check |
| Chapter 2 | Topic 3 | Read |
| Chapter 3 | | Excerpt |
| Conclusion | | |

- Move collections or create subcollections.

7: Create Tags

- In the detailed view of an item, you can select the “**Tags**” tab in the right column and create new keywords.
- Click on three different items one after the other. Assign the keyword “**green**” via the “**Add**” button. Then display all the titles with this keyword by first clicking your folder in Zotero and then clicking the keyword in the left column at the bottom.
- Now you should see only the items with the keyword “**green**”.

8: Optional - Search Titles via Search Bar - Search in Title, Text and Tags

- Click a library or collection in your project. Search for a title keyword in the search bar (middle column on top).

9: Optional - Notes: Create Text Excerpts and Your Own Comments

- In the right column in the “**Notes**” tab in the deatail view of an item, you can enter text excerpts and your own comments.
- Click **Add** and enter via copy&paste or manually. The following format allows quick retrieval and assignment of the notes: Comment (thought/note): core statement, p. 5-12: “This is a comment on lorem ipsum.”
- Direct quote: key statement, p. 10: "This is a direct quote."

Cite References

10: Chose a Citation Style

- Go to the “**Style Manager**” (Zotero/Settings/Cite) and click “**Get additional styles ...**”
- Select the required citation style. In the citation style preview you can see how a chosen style impacts on formatting citations in the text and in the bibliography.
- Click the desired style so that it appears in the “**Style Manager**”. For example, search for the following styles and add them to your style manager:
 - APA 6th edition
 - Deutsche Gesellschaft für Psychologie 5. Auflage (Deutsch)
 - Hochschule der Medien Stuttgart (Deutsch)

11: Optional - Create Bibliography from Items in a Collection

- Create a bibliography by right-clicking on a collection. Select “**Create Bibliography from Collection...**” from the list offered.
- A new window opens. Then select the desired citation style, output mode (bibliography) and output method (e.g. clipboard, save as RTF) in the new window. Save or copy the list.

12: Cite in Word with Zotero

- Open a new document in **Word**. At the top right you will find the Zotero tab. Click on the tab. Then click “**Add/Edit Citation**”.
- A new window will open. Select the desired citation style there and confirm with OK.
- A search box with a red border opens. Here you can enter **keywords** (author and title keywords) or a year of publication to find the desired item.
- Alternatively, you can select the **Classic View** by clicking the small triangle next to the Z and selecting the classic view. Here you can choose the items directly and enter additional information such as prefix and page number.



- Insert literature references into your Word document in the pattern shown below:

- (Author year)
- (See. Author year, p. 10)
- Author (year)
- (Author A; author B)

13: Create a Bibliography in Word with Zotero

- At the end of your Word-document, type the word “**Bibliography**”.
- Then move your cursor one line below it and choose “**Add/Edit Bibliography**” from the Zotero tab.
- Your bibliography will be generated automatically and will adjust as you change your document or when you click the Refresh button.

