Introduction to Zotero
# Self-study Material

WITH EXAMPLES FOR NATURAL SCIENCES

Introduction

In this self-study material, you will get to know the reference management programme Zotero and learn how to collect and organise your sources and create a formally correct and consistent bibliography.

Suppose you are writing a term paper on "The Impact of Climate Change on Biodiversity in the Arctic" and using Zotero to help you organise your references.

How can I install Zotero?

You can download Zotero by clicking the red "Download" button on the Zotero homepage: https://www.zotero.org/
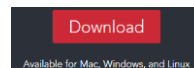
Download Zotero 6 for your platform (Windows, macOS, or Linux) and install the connector for your browser (Firefox, Safari, Edge, or Chrome).

Screenshot of the Zotero download page in Mozilla Firefox Browser
(Firefox: CC BY 3.0)

You will then see a "Z" appear in your browser bar.
A "Zotero" tab will also automatically appear in Word.

Part 1: Gathering and Organising

1. Creating a new collection

Open Zotero. If your programme interface is German and you would like to continue in English, you can easily change the language settings: *Bearbeiten → Einstellungen → Erweitert → Sprache → English*

Find the icon 🗂 in the top left corner of the navigation menu and click on it to create a new collection/a new folder. Create a new collection titled "The Impact of Climate Change on Biodiversity in the Arctic" to organise your materials on this topic.

### 2. Saving a book from GöDiscovery in the collection

2.1. Your instructor recommends the following book. Find it in [GöDiscovery](#) and add it to your collection.

"Arctic Ecology" by David N. Thomas (ed.)

Tip: To add a book to your collection click on the Zotero book icon 📖 in your browser bar. The letter "Z" has turned into a book icon.

2.2. Switch to the Zotero window. Zoom out 🔲 if necessary.

A set of metadata elements required for your bibliography (e. g. book title, author, editor, year etc.) will appear in the "Info" tab. Verify the metadata yourself. Is the editor indicated correctly? Correct the data where necessary.

Info	Notes	Tags	Related
Item Type	Book		
Title	Arctic ecology		
▼ Editor	Thomas, David N.	⊟ ⊕	
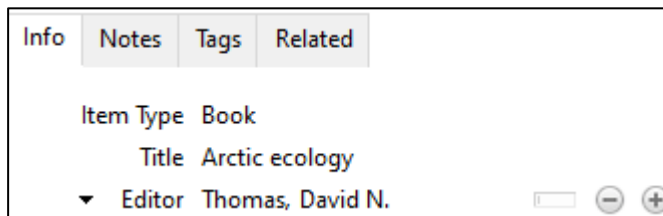
2.3. Assign a tag to this book and add a note.

3. Adding an article from an edited volume

During your research, you come across the following title:

Zack, Steve and Joe Liebezeit. (2013) Arctic Shorebirds: Conservation of a Moving Target in Changing Times. In *Wildlife Conservation in a Changing Climate* (ed. J. F. Brodie et al), pp. 204-225.

It appears to be an article from an edited volume and you would like to include it in your collection.

3.1. Search for works edited by Jedediah F. Brodie in GöDiscovery and add this book to your collection.

3.2. Check the automatically transferred metadata in the tab "Info" in Zotero. Fill in the missing information or correct entries where necessary.

3.3. To add the information about the article, click on the icon ⊕ ▾ in Zotero and select "*Book section*" as your document type. Now you can enter the information about the article (title, author, pages, book title, collection editor, publication date).

3.4. Link the article to the respective edited volume in the tab "Related".

4. Adding an article from a database

Access the search for databases in "**Databases (DBIS)**" via the [homepage of the Göttingen State and University Library](#). You can view all databases relevant to your field by selecting your subject from the list *"Fachübersicht"* (*Subject areas*)*.* For this example, choose *"Naturwissenschaft allgemein"* (*Natural sciences*). On the list of top databases, you will find "*Web of Science*"*.*

Web of Science	
Weitere Titel:	ISI Web of Knowledge WoK WoS Web of Science – the Complete Citation Connection
Recherche starten:	http://han.sub.uni-goettingen.de/han/wos
Weitere lizenzierte Zugänge:	Verlags-URL
Verfügbar:	im Netz der Universität Göttingen U
Hinweise:	Die SUB Göttingen hat lizenziert: • WoS - Science Citation Index Expanded (SCIE) • Journal Citation Reports (InCites JHCD) • Social Sciences Citation Index (SSCI) • Medline

Screenshot of the description of 'Web of Science' database in the system DBIS.

If you go for the link [http://han.sub...](#), you'll be asked to provide your library user number and library password before accessing the database. You can skip this step by clicking the second link if you are on campus or using [the university VPN](#).

4.1. Start your search in the database "*Web of Science*". Search for literature on climate change and biodiversity in the Arctic. Begin with the following query: *"climate change" polar bear* adapt**

Tip: If you wish to find terms that appear as an exact phrase as, for instance, *climate change*, put this phrase into **"…"** quotation marks. By adding an asterisk ***** at the end of a word you can search for results with other endings. For example, a search for *adapt** will also retrieve results for *adapting*, *adaptation*, etc. This method is called truncation.

4.2. Find the following article in the list of search results:

> Phenotypic plasticity and climate change: can polar bears respond to longer Arctic summers with an adaptive fast? By: Whiteman, J.P.; Harlow, H.J.; Durner, G.M.; Regehr, E.V.; Amstrup, S.C.; Ben-David, M. (2018).

Download the PDF and the metadata for this article to your collection.

Tip: If an article is not an open access publication, click the SUB-button next to the article to see if the full text is licensed by the university. SUB ◎

Title: Phenotypic plasticity and climate change: can polar bears respond to longer Arctic summers with an adaptive fast?
Source: Oecologia [0029-8549] Whiteman, John yr:2018 vol:186 iss:2 pg:369 -381

Full Text
🔴 Full text available via SpringerLink Journals Complete ⬅

Year: 2018 Volume: 186 Issue: 2 Start Page: 369

Available from 1997 volume: 109

Screenshot of text availability options via SUB button.

The PDF and the respective metadata will be available on the journal's website which can be accessed via the link "*Full text available via*" (see icon 📄 or 📄 for download).

5. Saving quotes from PDF articles

Open the saved PDF article in Zotero (Right mouse click on the title → *Open PDF*). Create a new note by clicking *Add Item Note* on the right.

Item Notes [+]

Add Item Note
Add Item Note from Annotations

All Notes
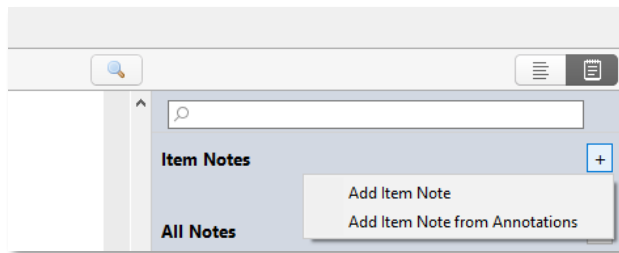
Select a sentence you want to save and add it to the note.

Tip: Exit your note and add a new note before you add another quotation. Otherwise all quotes you save will be stored as one single note.

Part 2: Citing and compiling a bibliography

1. Creating a quick bibliography

Zotero enables you to create a quick bibliography as an overview of the retrieved material:

1.1. Select the titles from your collection with Shift+arrow-key or with Strg(or Ctrl)+single mouse click

Note: When marking the titles, avoid clicking on snapshots, links, and PDFs. Otherwise, they will appear in your bibliography as individual entries as well.

1.2. Right-mouse click and "Create Bibliography from Items…"

1.3. Choose a citation style. Select "Bibliography" and "Copy to Clipboard", then click "OK".

1.4. Now you can paste the bibliography in a Word document (Strg(or Ctrl)+V).

2. Adding references

Prepare a short text in a Word document. Suppose the text contains statements you need to support by references to the sources from your collection. Go to the tab "Zotero" in the navigation bar of Word.

2.1. Set "Chicago Manual of Style 17th edition (author-date)" as your citation style. To do so, go to the Zotero tab in Word and click "Document Preferences", choose the citation style, and click 'OK'.

Tip: If you cannot find your preferred citation style, click **Manage Styles**, check the list of styles in the style manager and, if needed, download other styles by clicking *Get additional styles*. Another way would be going to Zotero / Edit / Preferences / Cite / Tab *Style* / Link: *Get additional styles.*

Note that if your citation style requires you to specify page numbers, you have to enter them manually in the Zotero window.

2.2. Insert a reference from your Zotero collection anywhere in the Word document.

When you click "*Add/Edit Citation*", a search field will appear. Click on "Z" and choose the source you wish to use for your citation.
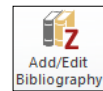
Choose "Classic View": a window with the list of your sources will appear.

The Classic View will display the list of your titles.

3. Compiling a bibliography

3.1. To create a bibliography with Zotero click "*Add/Edit bibliography*".

Tip: Make sure the mouse cursor is at the end of the document, so that the bibliography appears there.
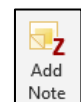
3.2. If you insert another citation in your text, the bibliography will be updated automatically.

3.3. Change the citation style to "Modern Language Association 8th edition". What can you notice?
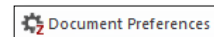
4. Adding quotations

4.1. To add a quotation saved from a PDF article, select a space in your text where the quote should appear and click "*Add Note*".

4.2. Select a quotation from the Zotero pull-down menu, and it will be inserted in the text. The reference will also automatically appear in your bibliography.

Extra tasks

1. You can quickly add a new entry to your collection via ISBN, DOI (Digital Object Identifier), or PubMed ID. To do so, click on the so-called "magic-wand" icon (i. e. Identifier) in the Zotero menu-bar, and enter, for example, the following ISBN: 978-1-137-26622-4. Confirm by pressing Enter.

2. Add any article from Spiegel (http://www.spiegel.de/international/) to your collection via the website-icon you will find in the browser bar. Check if all the important metadata (e. g. authors) has been imported successfully.

Tip: With the help of a snapshot you can always come back to the original page of the online article. By clicking on the arrow next to the title you can choose the snapshot.

Further tips

How do I choose the right citation style?

It is best to set the citation style required for your paper before you start. Different disciplines may require different citation styles. We recommend consulting your department or study programme on which citation style is preferred in your discipline.

What metadata do I need to edit in Zotero?

You bibliography is created with the information you provide when adding titles to Zotero. Make sure to always check automatically transferred metadata and correct entries where necessary. For example, you might need to correct umlauts (ä, ö, ü) and substitute German-language elements when using the programme in English, e. g. u. a., hrsg.

How do I edit book subtitles in the tab "Info"?

Zotero does not offer a separate field for subtitles. There is only one field for a complete title instead. If your book has a subtitle, make sure you add a separating character (e. g. a colon, semi-colon) between the title and the subtitle as stated by the citation requirements of your discipline.

Which default settings are recommended in "Edit / Preferences"?

To avoid too many unspecified tags from appearing from the catalogue, go to the tab "General" and delete the check from "Automatically tag items with keywords and subject headings".

Registration is necessary for synchronising your data (e. g. when using different computers) and for group projects. To sign up, click on "Create Account" in the tab "Sync".
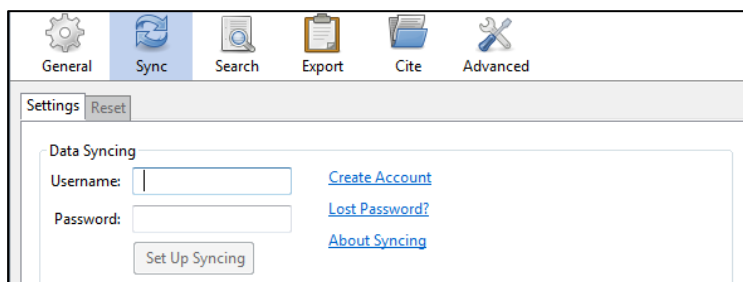
How do I secure my data?

In the tab "Advanced", you will find *Data Directory Location*, where documents and folders from Zotero are stored on your computer. The data directory contains your Zotero library including file attachments (PDFs, images, web pages, etc.) and metadata.

Backup your data from time to time!
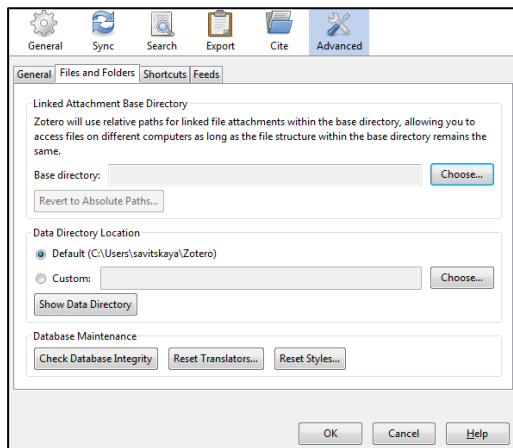
Tip: We recommend the 3-2-1 rule for data protection.

3 copies of documents in at least

2 different places on more than

1 type of memory device

For example:

- On your laptop (in your backpack)
- At your university storage (at GWDG ownCloud)
- On a USB flash drive (in your pocket)

Where can I find Zotero support?

If you have any problems with download and installation of Zotero please contact StudIT Support.

For more tips and tricks for using the programme, you can consult the extensive documentation on the Zotero website www.zotero.org.

Direct your questions on using Zotero at the University of Göttingen (e. g. access to databases / catalogues, team projects, tutorials) to our reference management team: AG Literaturverwaltung (e-mail: literaturverwaltung@sub.uni-goettingen.de).

Learn more about our resources:

You will find information about our courses offered in English here: www.sub.uni-goettingen.de/-M9Q8z

Other self-study materials can be found here: www.sub.uni-goettingen.de/-KYCSA

Looking for basic tips for using the library? Check out our short video tutorials on YouTube.

Questions? Get in touch with us:

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