



UNIVERSITÀ
DEGLI STUDI
DI PADOVA

ZOTERO: A free software to manage and create the bibliography



BIBLIOTECHE
DI INGEGNERIA



SISTEMA BIBLIOTECARIO
DI ATENEIO



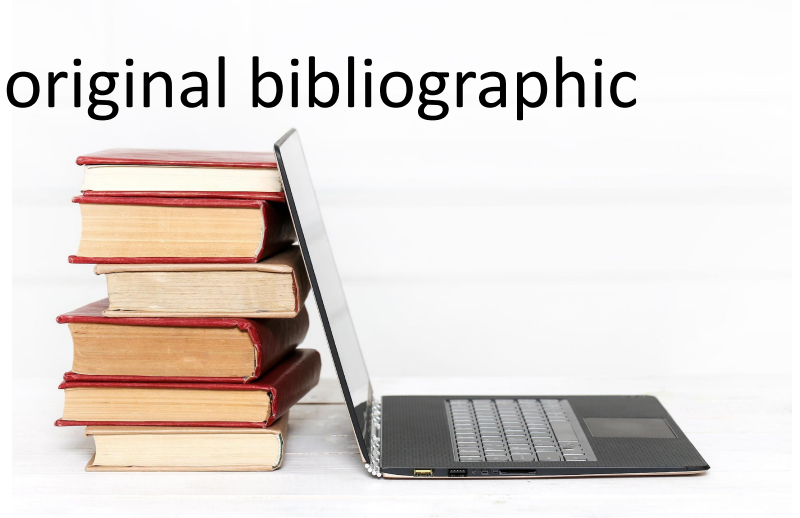
What we will see today?

1. What is a bibliography
2. What is a citation style
3. Why use a reference management software
4. Introduction to Zotero
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6. How to manage your library and collection in Zotero
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Why use bibliographic citations?

Bibliographic citations are used to:

- ❑ compare ideas and opinions of different authors and strengthen the arguments presented
- ❑ document your research path, giving scientific value to it
- ❑ so, other people can find the original bibliographic source
- ❑ do not plagiarize
(What is [plagiarism](#)?).



What is a bibliography?

In a research project — whether it is a thesis or an article for a scientific journal — a bibliography is an **organized list of the documents (books, articles, essays, web pages,...) that have been used.**

Bibliographic citations are in the text (in a synthetic way):

- to indicate the source of a concept
- when the citation is paraphrased
- when the citation is reported in quotation marks

At the end of the paper, in the final bibliography, all the bibliographic citations will be presented in full and, generally, in alphabetical order by author.

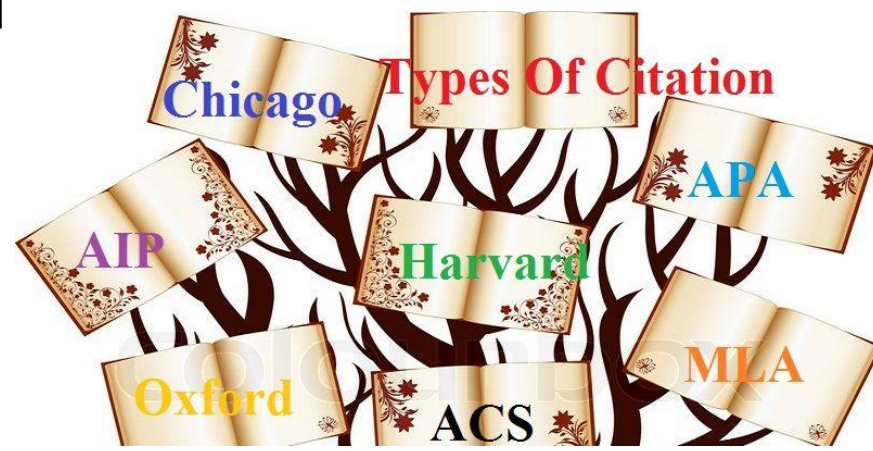


Citation style

A citation style is the way of structuring bibliographic citations.

When compiling a bibliography, the author(s) must decide on a citation style, **which may be recommended by the tutor or the publisher.**

While there is no single standard that applies to all publications, the style you select should be **consistent throughout the document.**

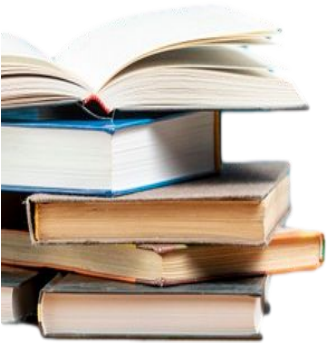




Examples

A bibliographic citation must contain all the elements necessary to uniquely identify the document.

These are the essential elements to identify the main types of documents:



Book: author(s)' name and surname, title, publisher, year of publication

Ex. Bernardini A., *Bounding uncertainty in civil engineering theoretical background*, 2010, Berlin, Springer.

Article: author (or authors), article title, journal title, year of publication, volume number, issue number, pages

Ex. Chen, Xuanying, et al. "*Engineering Stable Radicals Using Photochromic Triggers*", *Nature Communications*, Dec. 2020, vol. 11, no. 1, pp. 1–8.



Examples



Thesis: name and surname of the author, title, year, department, university

Ex. Berti F., *Usa degli aggregati riciclati nel calcestruzzo*, 2012, Tesi di laurea, Scuola di Ingegneria, Università degli Studi di Padova

Web page: page title, site title, copyright date, web address, last viewed date

Ex. Home ASCE < <https://www.asce.org/>>, ultima consultazione 02/01/2025

Why use reference management software?

These applications can help you:

- **import citations** from catalogues, databases and websites
- **create and organize bibliographies** for theses, books and articles
- **insert and format citations** while writing a document





It is a free reference management software that allows you to:

- create and organise your own bibliographic database, possibly attaching pdfs
- import bibliographic citations from catalogues, databases, electronic journals, websites
- insert bibliographic citations into text files according to a predefined citation style
- automatically create the final bibliography



Zotero (only the online version) can also be used to share citations and access groups.

Zotero is particularly effective as a PDF document management tool, for metadata extraction and as a PDF reader. But the internal reader also handles other formats (such as EPUB).

The web platform allows you to store attachments up to 300 MB for free (storage space expandable upon payment of a subscription fee). This limit is not present for stand-alone use of the program on your PC.

<https://www.zotero.org/>

First of all...

1. (Create an **account** if you plan to access from different devices)
2. Install [Zotero 7](#) (for Windows, Mac o Linux)
3. Install [Zotero connector](#): it is a browser extension that helps import citations while browsing the web (an icon appears next to the address bar)
4. Install **word processors add-in** (Edit>Settings>Cite>Word processors): it allows you to insert formatted citations into writing files and create bibliographies



Zotero Connector

The Zotero Connector's save button is the most convenient and reliable way to add items with high-quality bibliographic metadata to your Zotero library. As you browse the web, the Zotero Connector will automatically find bibliographic information on web pages you visit and allow you to add it to Zotero with a single click.

An icon  will appear in the web address bar

The icon changes according to the type of document




Please note: if you have activated Proxy Docile in your browser you need to disable (not uninstall) it when using Zotero connector. You can still use the Proxy with the Auth-proxy service.

<https://bibliotecadigitale.cab.unipd.it/en/search-tools/proxy/guide-to-the-auth-proxy-configuration>



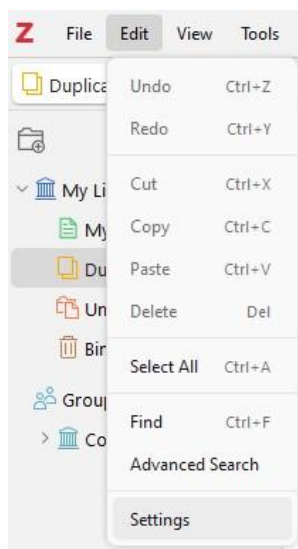
Bibliographic database

- It is filled by importing references from the web or from files saved on the PC.
- Records appear in the 'Web Library' (online version) or in 'My Library' (version installed on the PC)
- It is possible to organize the database in collections and subcollections: records remain in 'My Library' in any case.
- To align records and collections between the local and the online archive click on the **Synchronization button** 

Zotero 7

The first time you access the Zotero PC version, in order to sync with the online version, you need to enter your account credentials:

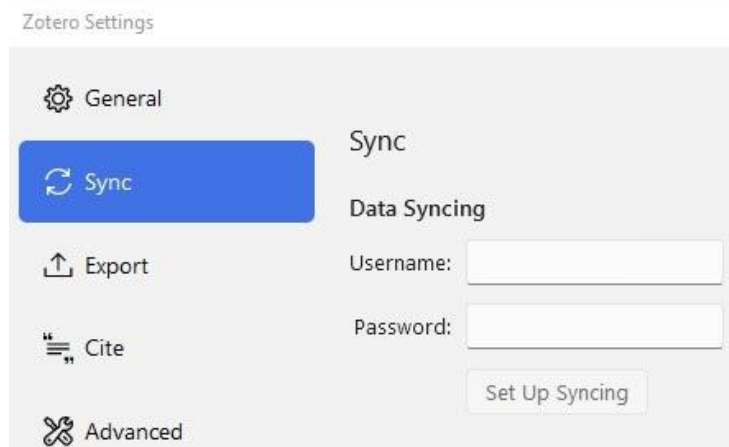
1. Edit > Settings



2. Settings > Sync

3. Enter your credentials

4. Click on Set up syncing





Zotero 7

Zotero allows many customizations regarding the display preferences:

- You can set the color scheme to “dark”
(Edit>Settings>General>Appearance and language)
- By acting on the “View” menu you can adjust many visual characteristics



Import without Zotero Connector

In order to import bibliographic references, in some cases it is necessary to choose the “export” function and download a file in RIS or BIBTEX format.

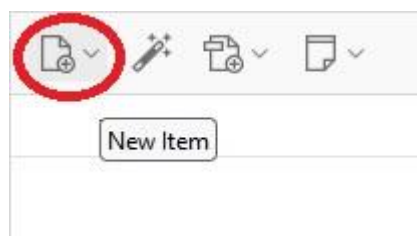
Two different choices are possible to complete the export:

1. Save the RIS or BIB file on your computer and then import it into Zotero:
menu FILE > IMPORT
2. Right-click on the file saved on your PC and choose “Open with” Zotero

Remember to check and correct the captured references!

Manually adding items

To manually add a reference, select "New item" on the top; you can choose the correct type (book, magazine article, etc.) and fill in fields.



If you know an identifier (DOI, ISBN, ArXivID or PMID) of one item, you can enter it clicking on the “magic wand”: the citation will be filled in automatically.



Save metadata of a PDF file

Drag and drop the PDF file in Zotero and it will automatically extract all metadata (if any).



ATTENTION!

It only works with native
PDF files, not scans!!



Storage PDF

Zotero's online version free storage for attachments is up to 300 MB.

You can check the space availability in your Zotero account:

Zotero online > your profile at the top right > Settings > Storage.

Here you can also find information about subscription plans to increase available space.

Tips for saving storage

Click on the paperclip icon and choose:

1. *Web Link* (to add a link to a web page where the pdf is located)
2. *Linked file* (only if you always use the same PC, in fact, you will attach a link to a file on your hard disk)



Check and correct imported records

You can correct the captured record by selecting the reference and clicking on the individual fields in the *Info* section: they will become editable.

Check:

- ✓ the record "type" (book, article, website)
- ✓ *Info* section individual fields



Getting your library organized

Collections and subcollections

- hierarchical organization of files
- a reference can exist in multiple collections

Tags

- automatically added from the web
- manually added
- tag selector to manage your tags



Only on Zotero Desktop

Duplicate items: to control and merge duplicate entries

Advanced Search: you can always search within your own references by author and title. Only in the PC version it is possible to use an advanced search which allows more options.





Groups

With groups, you can collaborate remotely with project members, set up web-based bibliographies for your courses, and much more.

Group Libraries are separate from your personal My Library

CREATING GROUPS > zotero.org > Groups > Create a new group



Groups

If you have data sync enabled and are a member of a group, the group library will appear in the left pane of Zotero.

Items can be dragged into a group from **My Library** or another group and viewed or edited by other group members, if they have permission.





Creating bibliography - 1

Bibliography (list of references starting with Zotero)

- choose one or more references and right-click to select “Create Bibliography from Item(s)” or starting from a folder click on “Create Bibliography from Collection”
- Select a citation style
- Select as output mode: **Bibliography**
- Select as output method: **Copy to clipboard**
- Finally paste over the text where you want to insert the bibliography

Attention!

In this case, the bibliography will not be updated if you insert additional references.



Choosing citation style

- 1) You can choose the citation style by selecting it from the drop-down menu that appears
- 2) If necessary, click on **Manage styles...** at the bottom of the drop-down menu to open the **Zotero Settings > Cite** window.
- 3) You can view all available citation styles by clicking on **Get additional styles...**



Word Processors Add-In

- Allows you to automatically insert citations and notes into a document.
- The Add-in is downloaded automatically While installing Zotero on your PC.
- If it does not work correctly from the installed version:
Edit > Settings > Cite > Word Processors > Install Microsoft Word Add-in.
- It is compatible with Microsoft Word, Libreoffice, Google Docs, LateX
- To use it (as with Zotero Connector) you must have Zotero open



Zotero and LaTeX

Zotero is also compatible with Latex: automatic handling has been implemented in LATEX through an external program called bibtex

You can consult a guide (in Italian) on using Zotero with Latex at this link:

<https://www.guitex.org/home/images/doc/GuideGuIT/bibliografia.pdf>

Insert citations

- Position the cursor where you want to insert your citation and press the Zotero menu on the toolbar, select the **Add/Edit Citation** button.
- Select the citation style (you can always change it later)
- A red pop up appears where you can search for the bibliographic reference to be entered.



Clicking on **Classic View** instead, a list of all references in the personal library appears and, by choosing **Multiple Sources**, you can enter two or more citations together.



Insert notes

Position yourself at a point in the text and click on **Insert Note**. A yellow box appears through which you can search in My Library for the note to be inserted into the text.



The note may have been entered manually in the reference in Zotero or generated from an annotation within a PDF document (e.g. an entire sentence to be quoted, a section, a comment, an image)



Final tips

- Since Zotero is free software, it is recommended that, if you have a lot of the **Data Directory**, you periodically backup your folders by selecting: **Edit>Settings>Advanced>Files and Folders>Data Directory Location**
- If you are using a computer shared by other users, it's recommended, when you finish working in Zotero, to exit the program completely by selecting > **Edit >Settings>Sync>Data Syncing>Unlink account>** check “remove my zotero data from this computer”
- Zotero is constantly evolving, so it is useful to update periodically:
 - your installed version: **Help > Check for updates...**
 - citation style updates: **Edit > Settings > Advanced >** “Automatically check for updated translators and styles” > **Update now**





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The End

Zotero documentation

<https://www.zotero.org/support/>



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Thank you for your attention!

We are at your disposal

 biblio.inge@unipd.it



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