

Today's topic is **Zotero**

A crash course to help you with:

- installing and integrating with other software
- effortlessly save and cite your sources
- change settings according to your preference
- adding plugins for specific use cases
- picking the reference manager that suits you
- incorporating all of this in your research workflow

Zotero is a reference manager

"A bibliographic manager is software with which you can gather, store and organize your references" [1]

Maybe this is a bit obvious, but let's talk about where and when you can use Zotero in your research process

Research Cycle

Searching

Uni Library

Starting point for your research – don't forget the guides and Worldcat!

Aggregated databases

Broader search. Examples: Scopus, Web of science, Lens, Semantic Scholar

Specific databases

Full-text search and more detail. Examples: IEEE, ScienceDirect, NexisUni

Managing

Access to articles

Plugins & links: Lean Library, Unpaywall, Uni network, Ezproxy, Open access

Saving articles

Reference manager: Zotero, Mendeley, Endnote

Install browser plugin for your reference manager to make citing really easy and effortless

Read, write, repeat

Notes

take notes and annotate papers, identify keywords, concepts

Cite

Integrate your reference manager with your text editor for easy and correct citations

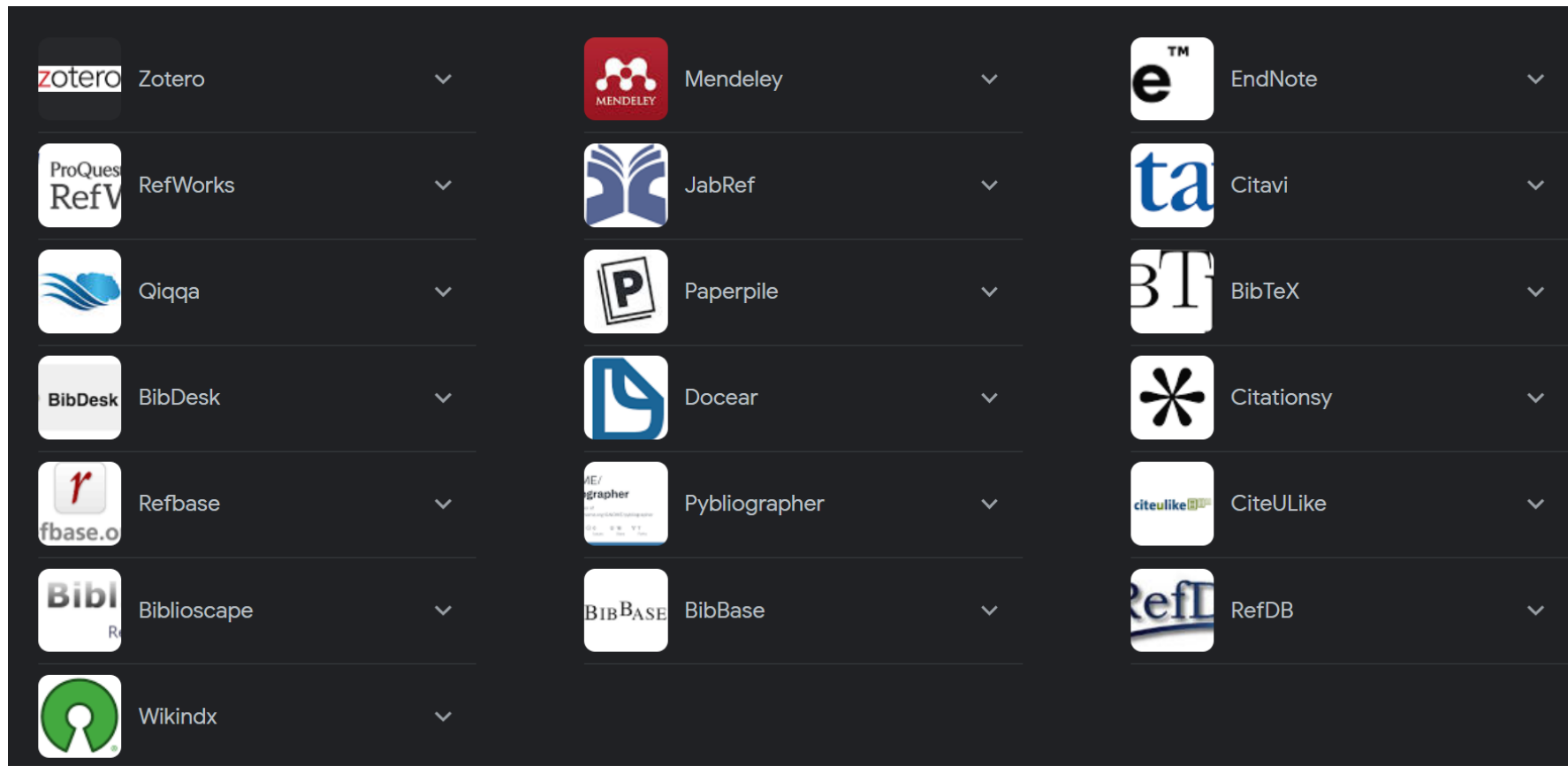
Discover more

Use your current bibliography and insight to kickstart the **next round** of searching.

Go back to the start, but now also use tools like inciteful, pure suggest, etc to help you alongside keyword searches

Zotero is one of many reference managers

I'll quickly compare the most used ones with Zotero to explain why I think it's the best choice



Comparison most used reference managers


Description

Why pick this one?

The logo for Zotero, featuring the word "zotero" in a lowercase, sans-serif font. The letter "z" is red, and the remaining letters "otero" are black.

My preferred manager. Free & open source. Can be customized to fit your needs.

- You want full control of the software & data and like playing around with settings
- You don't mind a kinda dated UI

The logo for Mendeley, featuring a red icon of three interconnected circles above the word "Mendeley" in a red, sans-serif font.

Decent 2nd choice. By Elsevier (Scopus). Easy to set up and use, barely any customization.

- You want something that works out of the box & looks nice
- You don't have any niche requirements

The logo for EndNote, featuring the word "EndNote" in a white, sans-serif font on a purple rectangular background.

Software with a long history. By Clarivate (Web of Science) Feels dated, is widely used.

- You want the true old-school experience
- You want to use a product licensed by the UT

More details

Integrations

Cost

Links



Browser plugin: Yes, excellent
Word plugin: Yes, excellent
Overleaf plugin: Yes, excellent
Integrates with even more!

Free, pay for websync
over 300MB. Can use own
webdrive or cloud storage
instead.

Software, browser & word plugin: www.zotero.org/download/
More plugins: <https://www.zotero.org/support/plugins> -
Better BibTeX is recommended if using LaTeX, see
<https://retorque.re/zotero-better-bibtex/>



Browser plugin: Yes, excellent
Word plugin: Yes, OK
Overleaf plugin: Yes, OK
No other integrations

Free, UT has subscription
for unlimited webstorage
until end of 2023: sign
up with utwente email.

<https://www.mendeley.com/download-reference-manager/>
Word: <https://appsource.microsoft.com/en-US/product/office/wa104382081?exp=ubp8>
Browser: <https://www.mendeley.com/reference-management/web-importer>



Browser plugin: Yes, bit clunky
Word plugin: Yes, OK
Overleaf plugin: No
No other integrations

Install from Notebook
Service Centre (desktop app
w/ license). Webstorage and
browser plugin are separate

Browser plugin: <https://click.endnote.com/>
Install:
<https://www.nsc.utwente.nl/software/view/V2pOU2JtVkhOVEJav0dOM1RYcFJla3g2U1RKUFJFbDVUbnByZVU1N1JUMD0/>

Installation & Setup

Setup guide for “basic” usage

Links to the most important pages

<https://www.zotero.org/> managers, make sure to download browser plugin as well; comes with Word plugin included

<https://leanlibrary.com/download/> - browser plugin so you can automatically access articles even when outside your uni network – integrates with Zotero ([guide here](#))

[https://www.overleaf.com/learn/how-to/How to link your Overleaf account to Mendeley and Zotero](https://www.overleaf.com/learn/how-to/How%20to%20link%20your%20Overleaf%20account%20to%20Mendeley%20and%20Zotero)

Integrate zotero with Overleaf (better option explained later)

[UT Library Service portal](#) – My university's official list of databases, guides, contact, get access, software, and more

[Information tools](#) – my personal overview of useful tools, databases and websites – use options to filter & categorize (eg. Cat:reference managers)

Install

<https://www.zotero.org/download/> - download page

<https://www.zotero.org/user/register/> - create account

https://www.zotero.org/support/word_processor_integration - integrate with text editors

<https://www.zotero.org/support/installation> - guide



Zotero 6 for Windows

Your personal research assistant

Download

Other platforms
macOS · Linux 32-bit · Linux 64-bit

Installation Help



Zotero Connector

Save to Zotero from your browser

Install Chrome Connector

Zotero Connectors automatically sense content as you browse the web and allow you to save it to Zotero with a single click.



Firefox connector

Install



Edge connector

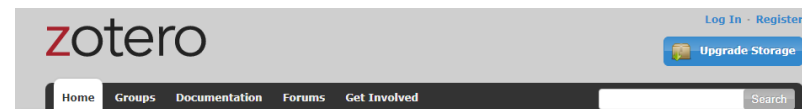
Install



Safari connector

The Zotero Connector for Safari is bundled with Zotero. You can enable it from the Extensions pane in the Safari settings.

If you're unable to install an extension in your browser, you can save web pages or identifiers to your library from [this page](#) or with the magic wand button from [your web library](#).



Register

[Register for a free account](#) · [Log in to your account](#) · [Forgot your password?](#)

If you haven't already created a Zotero account, please take a few moments to register now. It's a **free** way to **sync** and **access your library** from anywhere, and it lets you join **groups** and **back up all your attached files**.

Username

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

Email

Confirm Email

Password

Verify Password

I'm not a robot



Register

To get started with these plugins, see the following pages:

- [Using the Zotero Word Plugin](#)
- [Using the Zotero LibreOffice Plugin](#)
- [Using Zotero with Google Docs](#)
- [Troubleshooting](#)

[Third-party plugins](#) are also available for integrating Zotero with other word processors and writing systems.

Plugin Installation

The word processor plugins are bundled with Zotero and should be installed automatically for each [supported word processor](#) your computer when you first start Zotero.

You can reinstall the plugins later from the Cite → Word Processor Plugins pane of the Zotero preferences. If you're having trouble, see [Manually Installing the Zotero Word Processor Plugin](#) or [Word Processor Plugin Troubleshooting](#).

Setting it up yourself

We're going to take a look at some settings to make sure Zotero is set up like we want.

Install Zotero first, start it up, and then follow the guide.

Steps

We have some stuff to set up:

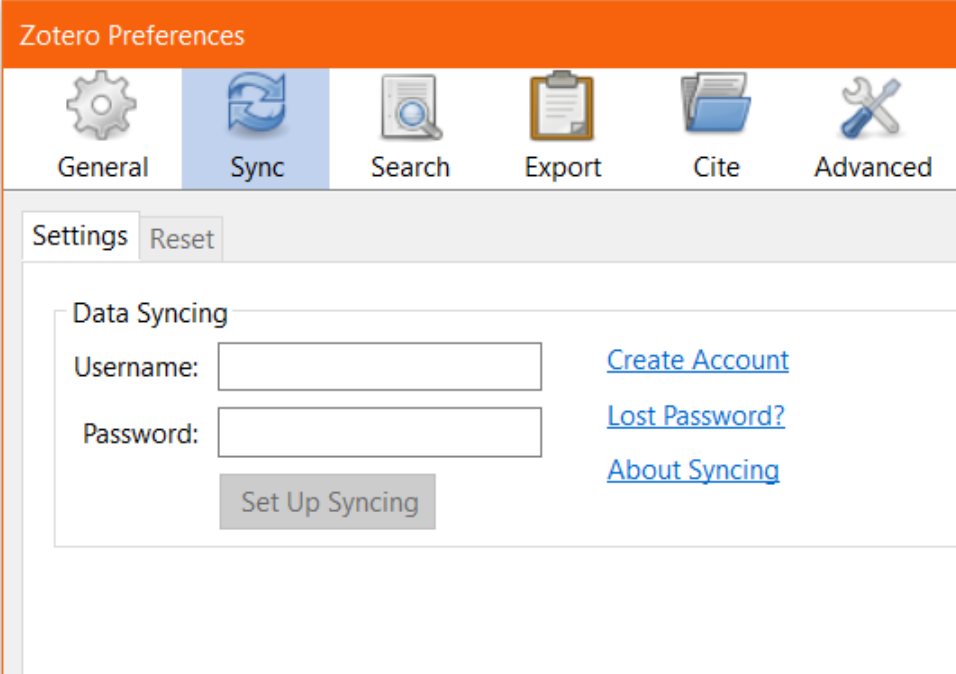
- Make a zotero account and link it
- Choose how and where to store our files
- Add your uni library as provider
- Check/setup the connections with browser and text editor
- Setup group library

Zotero account

<https://www.zotero.org/user/register> Free, 300mb storage, more can be bought

You don't need much storage: you only need to store metadata. Full text we'll save somewhere else.

Registered? Then go to
edit -> preferences -> sync
to add your account



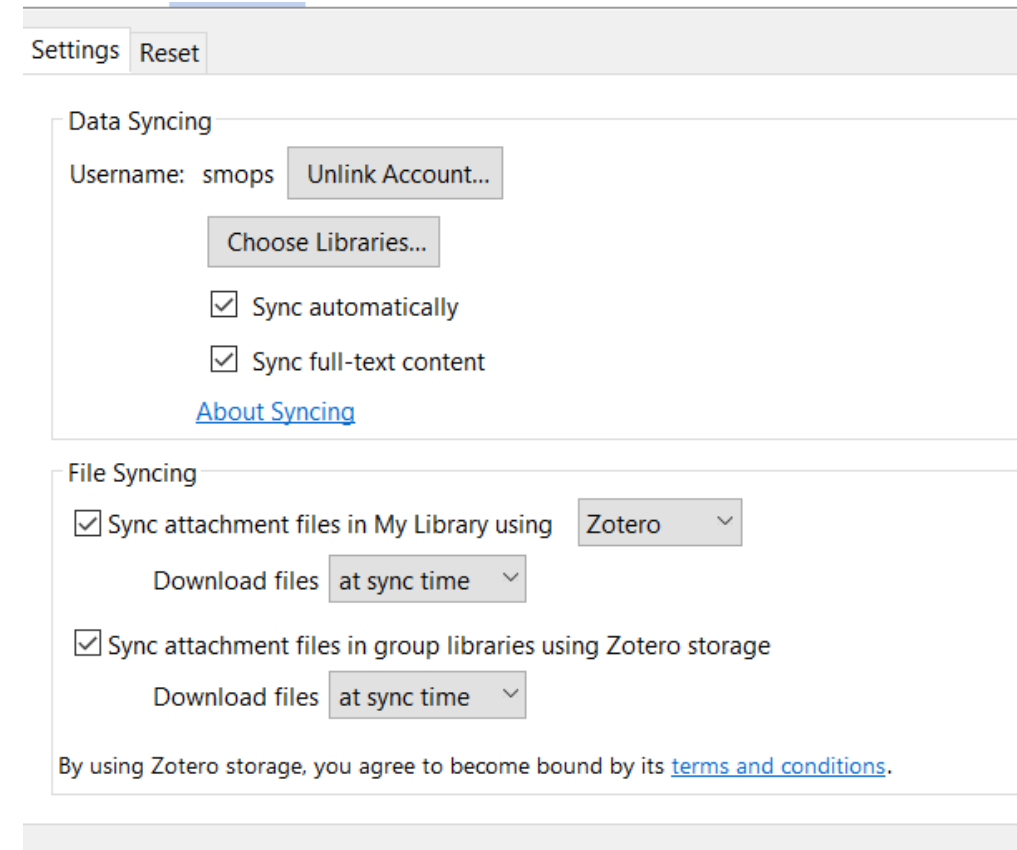
The screenshot shows the 'Zotero Preferences' dialog box with the 'Sync' tab selected. The 'Data Syncing' section contains the following elements:

- Settings** (selected) and **Reset** buttons.
- Data Syncing** section header.
- Username:** followed by an empty text input field.
- Password:** followed by an empty text input field.
- Set Up Syncing** button.
- Three links on the right: [Create Account](#), [Lost Password?](#), and [About Syncing](#).

Syncing: setup (preferences -> sync after linking account)

Always sync with zotero.com to keep your library backed up and to enable group sharing!

Full-text / file-syncing is not necessary, you can store it in a cloud-storage folder using Zotfile: a plugin for zotero.



The screenshot shows the Zotero settings page with the following options:

- Settings** | **Reset**
- Data Syncing**
 - Username: smops | **Unlink Account...**
 - Choose Libraries...**
 - Sync automatically
 - Sync full-text content
 - [About Syncing](#)
- File Syncing**
 - Sync attachment files in My Library using **Zotero** | **Download files** at sync time
 - Sync attachment files in group libraries using Zotero storage | **Download files** at sync time
 - By using Zotero storage, you agree to become bound by its [terms and conditions](#).

Zotero has loads of plugins you can install

[Official list here](#)

Essential plugins for basically everyone:

<http://zotfile.com/> - way better storage of PDFs

<https://retorque.re/zotero-better-bibtex/> - as backbone for lots of other plugins, and to better integrate with almost everything except Word

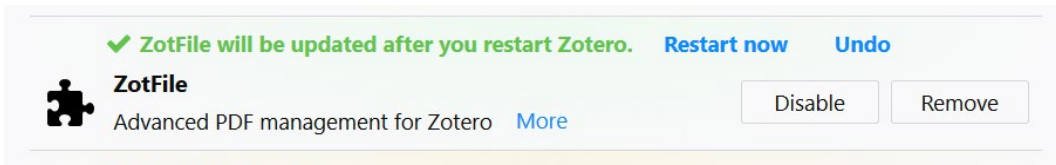
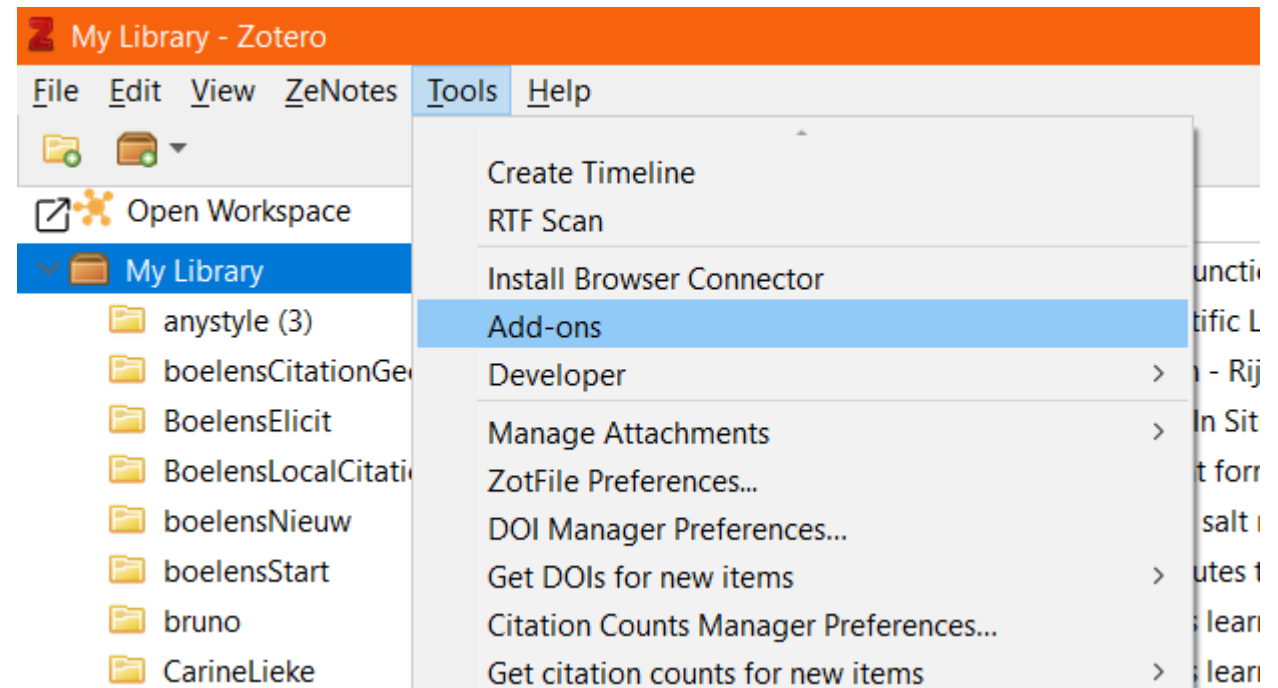
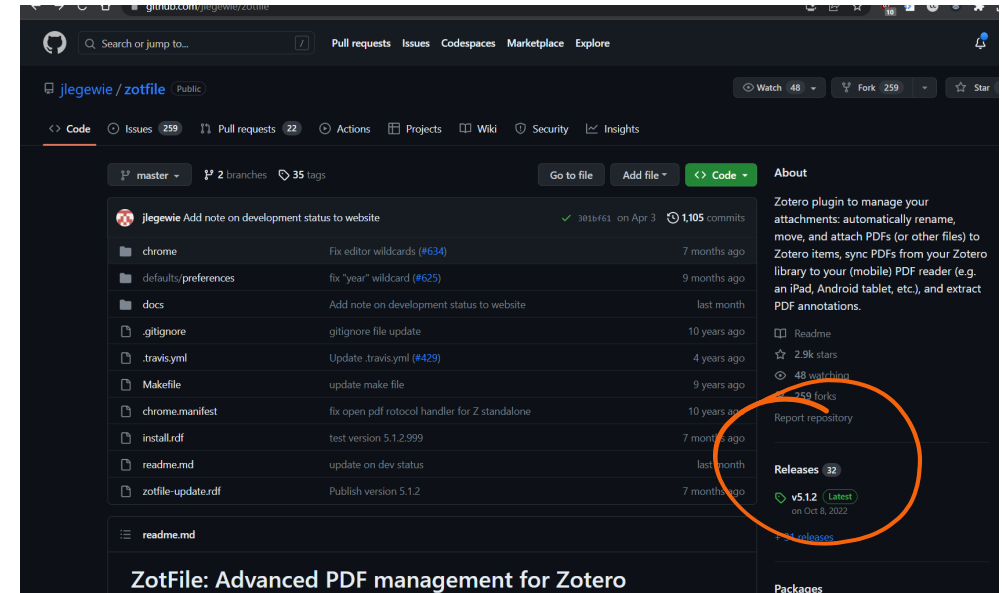
More on plugins later.

Essential plugin: Zotfile

First go to <https://github.com/jlegewie/zotfile/releases>,
click “releases” and grab the file
Then the rest of the steps

Install plugins

1. Download .xpi file
2. Open Zotero
3. Click Tools -> Add-ons
4. Click the gear icon and select “Install add-on from file”
5. Browse to the .xpi file and select it
6. Wait 3 second and press “Install Now”
7. Maybe restart Zotero, depends on plugin



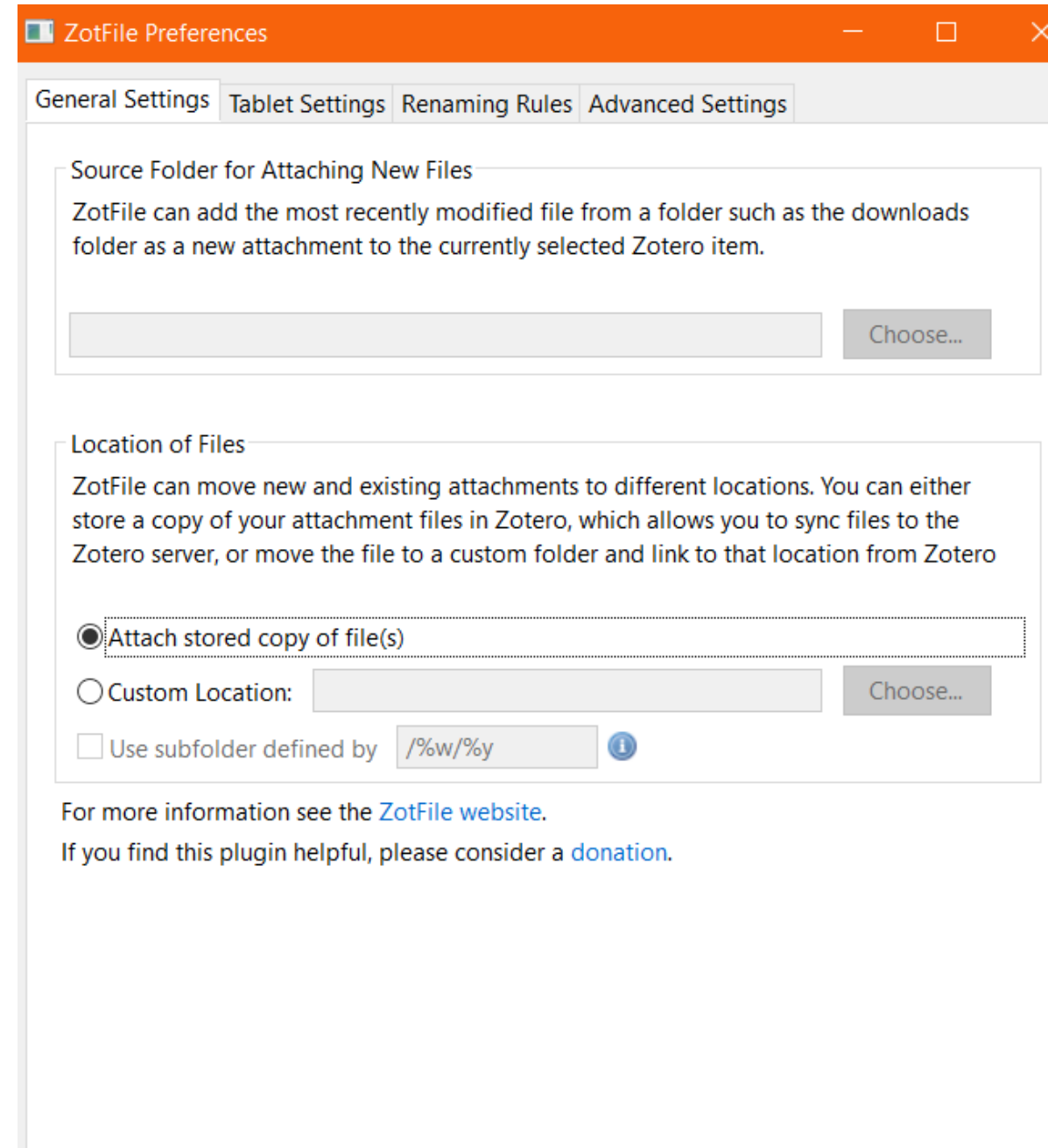
Syncing: Zotfile setup

Tools -> ZotFile preferences

Location of files -> custom location ->
pick a cloud folder

Done! Zotfile will rename all pdfs and
store them there.

You can do more with Zotfile, like easily
sync with a tablet or extract pdf
highlights as Zotero notes with links etc.



Are We Wasting our Children's Time by Giving them More Homework?	Ozkan Eren
Between-teacher differences in homework assignments and the development of students' homework effort...	Trautwein et al.
Classification and individualisation of black ballpoint pen inks using principal component analysis of UV-vi...	Adam et al.
Comparative Forensic Analysis of Lipsticks Using Thin Layer Chromatography and Gas Chromatography	Ezegbogu and Osadolor
Developing self-regulated	Zimmerman et al.
Discrimination of various	ultra-violet-visible near-infrared (UV-Vis-NIR...
Does Homework Improve	Research, 1987-2003
Does Homework Improve	Research, 1987-2003
Does Homework Improve	Research, 1987-2003
Effectiveness of PowerPoir	Bartsch and Cobern
Engineering student atten	Performance
Exploring the Benefits and	Higher Education Classrooms: A Form...
Exploring the Benefits and	Higher Education Classrooms: A Form...
Homework Assignments: C	Jr and Pruitt
Homework self-regulation: Grade, gender, and achievement-level diff	Get Table of Contents
Identification of adulteration in ground roasted coffees using UV-Vis spectroscopy and SPA-LDA	Souto et al.
Inquiry, Enga	
inst320_epst	
Intrinsic Mot	
Investigating	
Learners' Perceptions on the value of PowerPoint in Lectures.	rey and Bimbaun
Learning from lectures: The effect of varying the detail in lecture handouts on note-taking and recall	Morgan et al.
Learning Tools and Teaching Approaches through ICT Advancements	A

- Create Note from Annotations
- Find Available PDFs
- Add to Collection >
- Move Items to Trash...
- Export Items...
- Create Bibliography from Items...
- Generate Report from Items...
- Attach New File
- Manage Attachments >

- Rename and Move

Move and rename existing Attachments from selected Zotero item

You can manually ask Zotfile to move pdfs with the right-click menu.

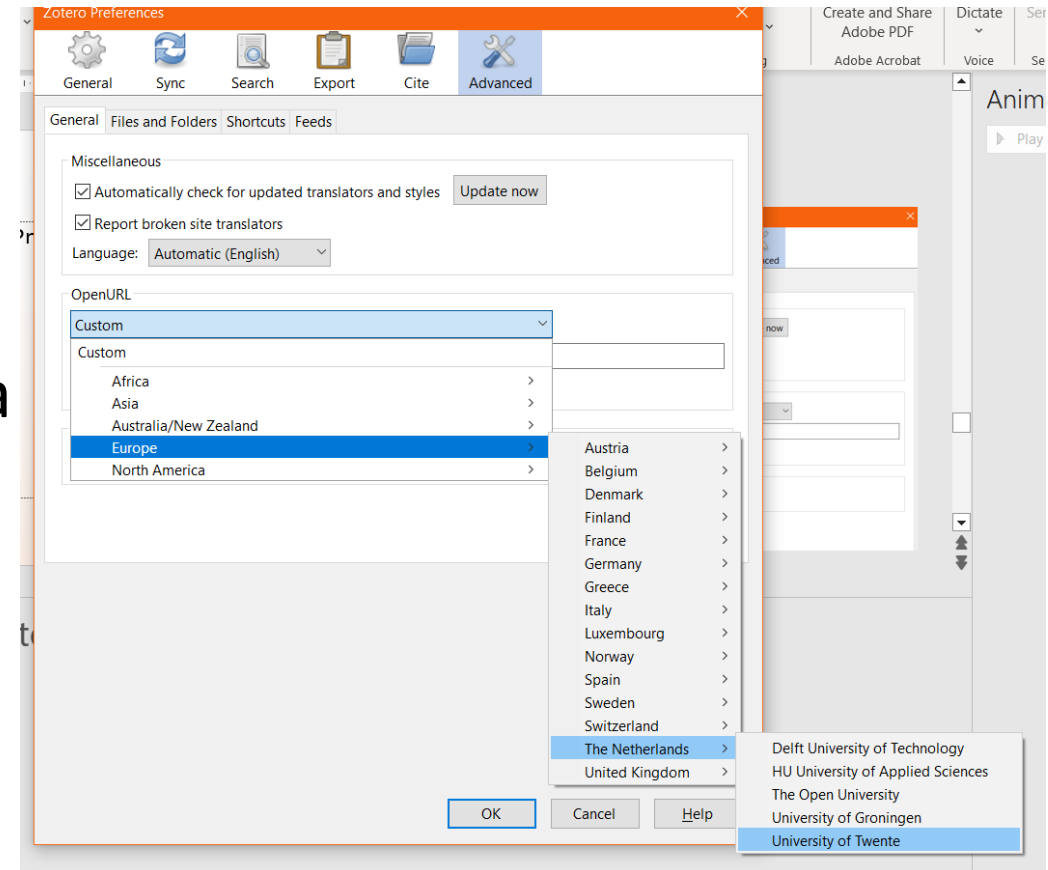
Connect with uni Library

Preferences -> advanced -> OpenURL

Select your uni as provider

This will make Zotero find PDFs and metadata through the library collection.

You can also use it to look up items in your library to see if it is available at all.



Find item in library or elsewhere

Select item(s) and use the green arrow in the top right to open in chosen database or elsewhere

The screenshot shows a search results table with columns for Creator, Title, and a green arrow icon. A context menu is open over the green arrow icon, listing options: View Online, View Snapshot, Show File, Library Lookup, CrossRef Lookup, Google Scholar Search, and Manage Lookup Engines... The table contains several rows of search results, including entries by Héfer Bembunty, Freeman et al., Yang et al., Eren and Henderson, and Ozkan Eren.

Creator	Title	Green Arrow
Héfer Bembunty		•
Freeman et al.		•
Yang et al.		•
Eren and Henderson		•
Eren and Henderson		•
Ozkan Eren		•
Trautwein et al.		•
Adam et al.		•
Ezegbogu and Osadolor		•
Zimmerman et al.		•
Kumar et al.		•
Cooper et al.		•
Cooper et al.		•
Cooper et al.		•

The screenshot shows the details for the article "Are We Wasting our Children's Time by Giving them More Homework?". The page includes a search bar, an "INFO" tab, and a sidebar with options like "VIEW FULL TEXT", "BROWSE RELATED ARTICLES", "IN LIBRARY", and "REQUEST". The main content area displays the article title, authors (Daniel J. Henderson and Ozkan Eren), publication information (Economics of Education Review, Volume:30, Issue:5, Page(s):950-961), and the DOI (10.1016/j.econedurev.2011.03.011). There are also links for "View PDF" and "View Full Text", and a section for "Full text availability for this item" with links to the journal and collection.

Find full text

[Edit search](#)

Are We Wasting our Children's Time by Giving them More Homework?

Article, Chapter

Authors: Daniel J. Henderson Ozkan Eren

Publication: Economics of Education Review, Volume:30, Issue:5, Page(s):950-961

Published: Pergamon, 2009

ISSN: 0272-7757

DOI: [10.1016/j.econedurev.2011.03.011](https://doi.org/10.1016/j.econedurev.2011.03.011)

Full text availability for this item

[View PDF](#)

[View Full Text](#)

Journal: [Economics of Education Review](#)

Journal: [Economics of Education Review](#)

Collection: [Elsevier ScienceDirect Journals](#)

Coverage: 1981-12~present; volume:1~present;issue:1~present

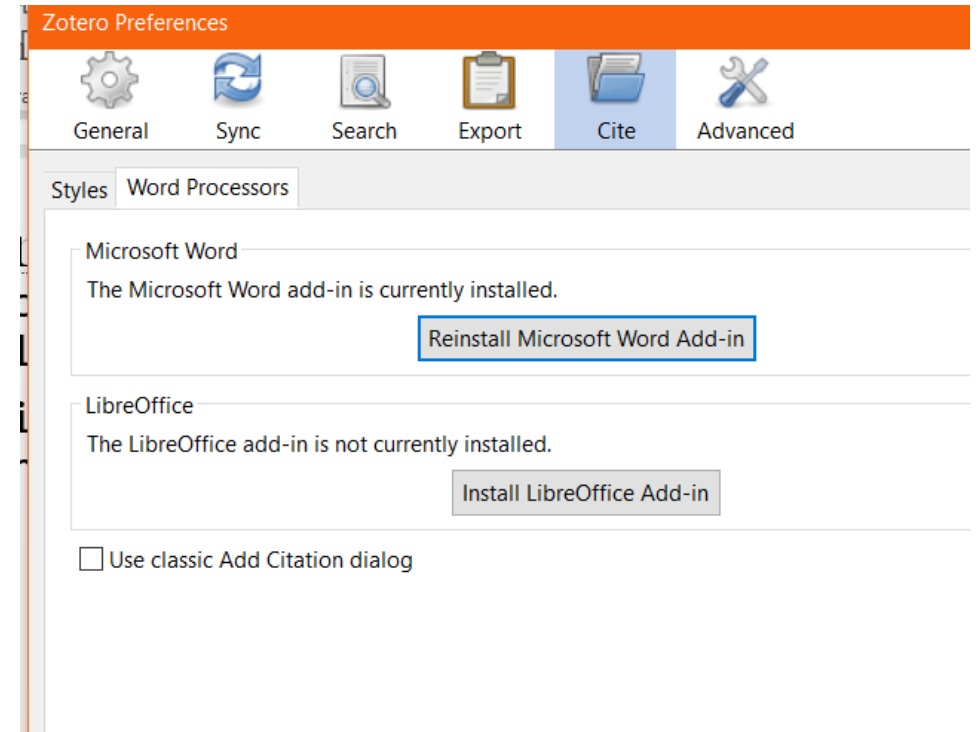
Connections

You can couple Zotero with Lean Library for access to articles using [this guide](#)

Integrating with word: edit -> preferences -> cite -> word processors -> install word add-in

Integrate with something else? [Install Better BibTeX plugin first!](#)

Guide for overleaf [can be found on the official site](#), but if you want a better experience (or use LaTeX in a different way) there are guides available in the better BibTeX Manual: by [using a cloud service](#) or using a [script with more functionality](#)



Group work

You can make a group library to share your work with others (and certain software like Overleaf). You need to use your Zotero account do this is. Guide is here:

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

You can fully share an entire library. You'll need to make a new library for each group: you can't quickly share a subcollection directly from zotero.

Plugin tips

Zotero can do a lot more!

No-brainers

Small additions but **very** useful:

<https://github.com/windingwind/zotero-pdf-preview>

<https://github.com/eschnett/zotero-citationcounts>

<https://github.com/bwiernik/zotero-shortdoi>

Nice integrations:

<https://github.com/scitedotai/scite-zotero-plugin>

<https://github.com/inciteful-xyz/inciteful-zotero-plugin>

More plugins I'd recommend

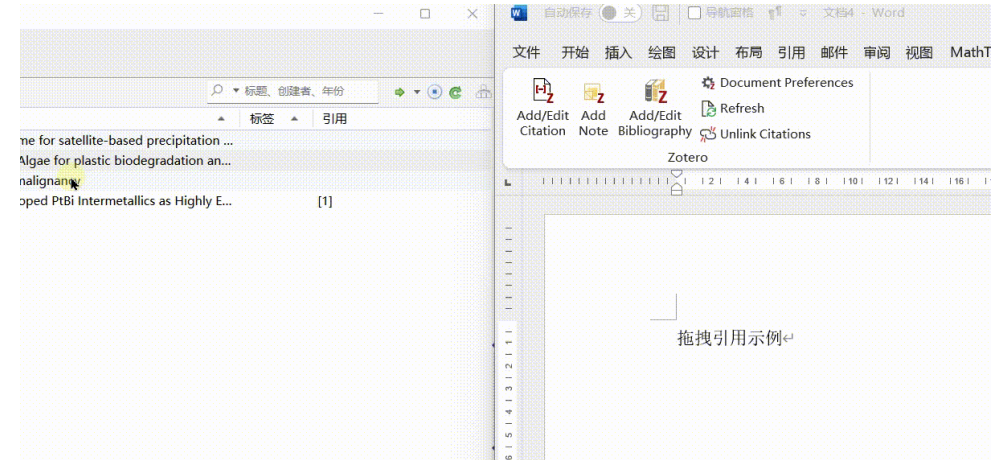
<https://github.com/windingwind/zotero-better-notes>

<https://github.com/windingwind/zotero-tag>

<https://github.com/MuiseDestiny/zotero-style>

<https://github.com/MuiseDestiny/zotero-citation>

- >    Block-NeRF: Sc
- >     KiloNeRF: S
- >      NeRF: Re



<https://github.com/northword/zotero-format-metadata>

<https://github.com/tecosaur/LaTeX-Utilities> - if using LaTeX and **not** Overleaf

Lookup the date, volume, issue, pages, etc according to DOI

Some items in the Zotero library may be added with incomplete information such as issue volume pages because the translator is not available, or the official publication is not in the journal at the time of record, etc. The plugin provides the ability to complete these fields based on the DOI.

<https://airtable.com/shrR9noEMoxsdHTzv/tblU33wV8nHeAcDpE> All plugins I use can be found in the table with useful links under the category “Reference Managers” or the tag “Zotero”. A lot more to find than just the ones on the slides here!

<https://github.com/topics/zotero> to find more plugins yourself