Work Instructions

Number: **007**

Name: **Citation management**

Title: Instruction for the management of bibliographic information and their import from external sources to the EU Pollinator Hub

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1 Document history

1.1 Current Release

1.1.1 Drafted

Submitted on 2023-10-26 by Michael Rubinigg, quality manager.

1.1.2 Reviewed

Reviewed on 2023-11-14 by Noa Simòn Delso, general manager.

1.1.3 Approved

Approved on 2023-11-16 by Michael Rubinigg, quality manager.

1.2 Change history

n.a.

2 Abbreviations

EU	European Union
EUPH	EU Pollinator Hub
n.a.	not available
WI	Work Instructions

3 Introduction

The current document provides instructions on the management of bibliographic information using the free and open-source reference management software Zotero and their import from external sources to the EU Pollinator Hub.

4 Validity

4.1 Area

The of validity of this document is limited to the management of bibliographic information and their import from external sources to the EU Pollinator Hub.

4.2 Time

The period of validity of this WI begins on 2023-11-16 and ends with its revocation.

4.3 Related Documents

n.a.

5 Procedure

5.1 Reference management using the application Zotero

5.1.1 Running Zotero

5.1.1.1 Placement in the Product Directory

- In the product directory of the EUPH the instructions for this section are available through the following slug:
  - English: *running-zotero*

5.1.1.2 Summary

Zotero is a free and open-source reference management software to manage bibliographic data and related research materials, such as PDF files. Features include web browser integration, online syncing, generation of in-text citations, footnotes, and bibliographies, an integrated PDF reader and note editor, as well as integration with the word processors Microsoft Word, LibreOffice Writer, and Google Docs [1].

5.1.1.3 Instructions

- **Downloading**
  - Download the application *Zotero* (https://www.zotero.org/download/) for the required operating system.
- **Installing**
  - Install the application following the instructions of the setup assistant.
  - Install the *Zotero connector* (https://www.zotero.org/download/) for the required browser (Firefox, Chrome, Edge, Safari), which allows to automatically sense content when they are accessed via the web browser and allow saving the information to Zotero.
- **Starting**
  - Start the application as required by your operating system.
  - Refer to the documentation (https://www.zotero.org/support/) for further instructions.

5.1.1.4 Related sections

- In the product directory of the EUPH the following sections should be linked through their slug:
  - Section 5.2.1 (*importing-bibliographic-data-from-zotero-into-euph*)
  - Section 5.1.3 (*exporting-bibliographic-data-from-zotero*)

5.1.2 Importing bibliographic data into Zotero

5.1.2.1 Placement in the Product Directory

- In the product directory of the EUPH the instructions for this section are available through the following slug:
  - English: *importing-bibliographic-data-into-zotero*

5.1.2.2 Summary

Zotero offers various ways to import bibliographic data from a publication into its database. Only the three most common are briefly described here. Please refer to Zotero's software documentation (https://www.zotero.org/support/) for further information.

5.1.2.3 Instructions

- Import from a web page with installed Zotero connector on the internet browser
  - Use your browser to call up the web page of the publication to be referenced.
  - Left-click on the icon of the Zotero connector in the toolbar of the browser.
  - Based on the preference settings of the application, the connector will save the bibliographic information in your Zotero database.
- Import from a web page without installed Zotero connector on the internet browser
  - Use your browser to call up the web page of the publication to be referenced.
  - Download the citation in any format that can be interpreted by Zotero, among which BibTeX, BibLaTeX, RIS, MODS or Zotero RDF (please refer to a complete list in the Zotero documentation (https://www.zotero.org/support)). The download function is usually provided on the web page of a publication and is often referred to as **Cite**, **Download Citation** or **Export Citation**.
  - Right-click on the downloaded file and select **Open with…** > **Zotero**.
  - A dialog box will appear in which you will be asked to confirm that you want to import the file. Select **OK**.
- Import from a copy of a publication in PDF format
  - Drag a copy of a publication in PDF format from your file manager application to the Zotero application. Zotero will try to extract the necessary metadata from the file. If it was successful, the application will add it in your Zotero database.

5.1.2.4 Related functions

- In the product directory of the EUPH the following sections should be linked through their slug:
  - Section 5.1.1 (*running-zotero*)
  - Section 5.1.3 (*exporting-bibliographic-data-from-zotero*)
  - Section 5.2.1 (*importing-bibliographic-data-from-zotero-into-euph*)

5.1.3 Exporting bibliographic data from Zotero

5.1.3.1 Placement in the Product Directory

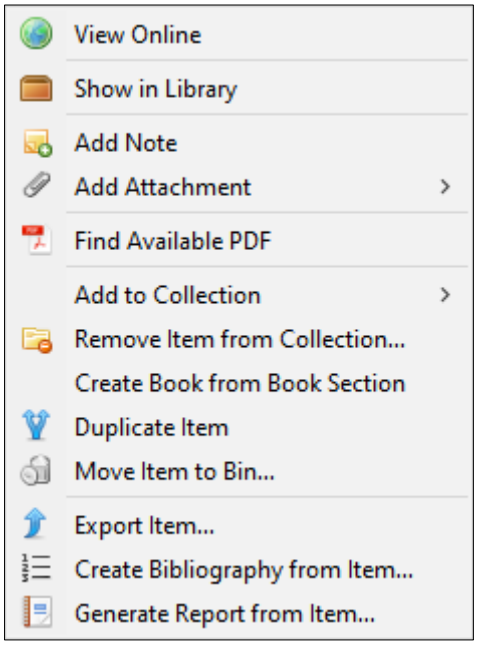
- In the product directory of the EUPH the instructions for this section are available through the following slug:
  - English: *exporting-bibliographic-data-from-zotero*

5.1.3.2 Summary

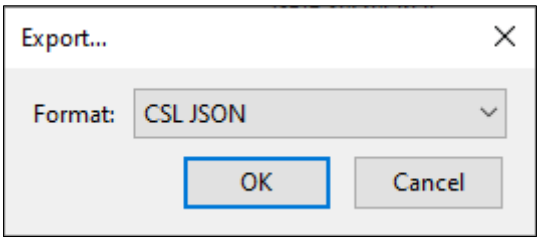
With the application Zotero it is possible to export bibliographic information in various standardised formats as a text file. This text can then be imported into the EU Pollinator Hub. This allows the EU Pollinator Hub to correctly interpret, process and display the bibliographic information, an important prerequisite for data quality, data standardisation and interoperability.

5.1.3.3 Instructions

- Start the application Zotero on your computer.
- Select the item you want to export.
- Right-click the selected item.
- **Export item**



  - A dialog box opens where you left-click **Export item…**



- The **Export…** dialog box opens where you can select the **Format** from the drop-down list in which you would like to export the item(s). *Note that currently only CSL JSON is supported by the EU Pollinator Hub.* Select **OK**.
- A file dialog box opens where you can select the directory, edit the **File name** and **Save** the file.

5.1.3.4 Related sections

- In the product directory of the EUPH the following sections should be linked through their slug:
  - Section 5.1.1 (*running-zotero*)
  - Section 5.1.2 (*importing-bibliographic-data-into-zotero*)
  - Section 5.2.1 (*importing-bibliographic-data-from-zotero-into-euph*)

5.2 Import bibliographic data from external applications

5.2.1 Importing bibliographic data from Zotero into EUPH

5.2.1.1 Placement in the Product Directory

- In the product directory of the EUPH the instructions for this section are available through the following slug:
  - English: *importing-bibliographic-data-from-zotero-into-euph*

5.2.1.2 Summary

With the application Zotero it is possible to export bibliographic information in various standardised formats as a text file. This text can then be imported into the EU Pollinator Hub. This allows the EU Pollinator Hub to correctly interpret, process and display the bibliographic information, an important prerequisite for data quality, data standardisation and interoperability.

5.2.1.3 Instructions

- **Copy bibliographic information from text file**
  - Open the text file containing the bibliographic information that was created when exporting bibliographic data from Zotero (section 0) with a text editor (for example Notepad++ (https://notepad-plus-plus.org/) or any other text processing software).



  - In the text editor select **Edit** > **Select All** or press **Ctrl + a** and subsequently select **Edit** > **Copy** or press **Ctrl + c** to copy the content of the text file.
- **Paste bibliographic information to EUPH**

- Select **Add Reference** in the EU Pollinator Hub input form.
- Access the **Content** input field of the form with a right-click and select **Edit** > **Paste** or access it and press **Ctrl + v** to paste the content of the text file into the field.

5.2.1.4 Related sections

- In the product directory of the EUPH the following sections should be linked through their slug:
  - Section 5.1.1 (*running-zotero*)
  - Section 5.1.2 (*importing-bibliographic-data-into-zotero*)
  - Section 5.1.3 (*exporting-bibliographic-data-from-zotero*)

6 References

[1] Wikipedia, “Zotero,” 29 10 2023. [Online]. Available: https://en.wikipedia.org/wiki/Zotero. [Accessed 04 11 2023].

7 Annexes

There are no annexes in the current document.