



Zotero 5.0

ZotFile Plugin

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Why ZotFile?

Generally speaking, ZotFile helps manage attachments (esp. PDFs) in Zotero.

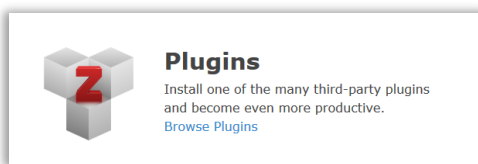
This includes:

- Renaming and automatically attaching recently downloaded files to a selected Zotero entry.
- Automatically placing attachment files in the preferred full-text location and creating links in Zotero.
- Extract comments and markups from PDF files and save them as notes in Zotero.
- Other features not covered in this guide (for further information, see the ZotFile website at <http://www.ZotFile.com/>):
 - Batch processing: renaming and moving attachments (any number at once).
 - Synchronize PDFs with iPad or Android tablet (incl. comments and markups added on the tablet).

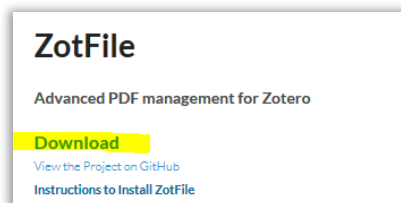
Installation

The ZotFile plugin for Zotero is free of charge and can be downloaded either from the Zotero download page or directly from the ZotFile website:

From the <https://www.zotero.org/download/> page, "Browse Plugins" will take you to a collection of Zotero plugins. Alternatively, you can go directly to ZotFile via <http://www.ZotFile.com/>.



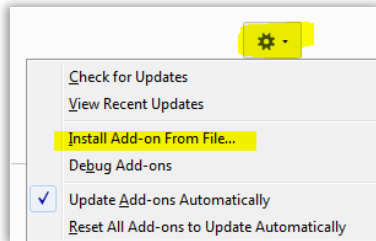
On the ZotFile website, **right-click** the download link in the **Firefox** browser, then select Save Link As... (In Chrome or Microsoft Edge, you can download directly from the download link).



Save the **.xpi** file to your computer.

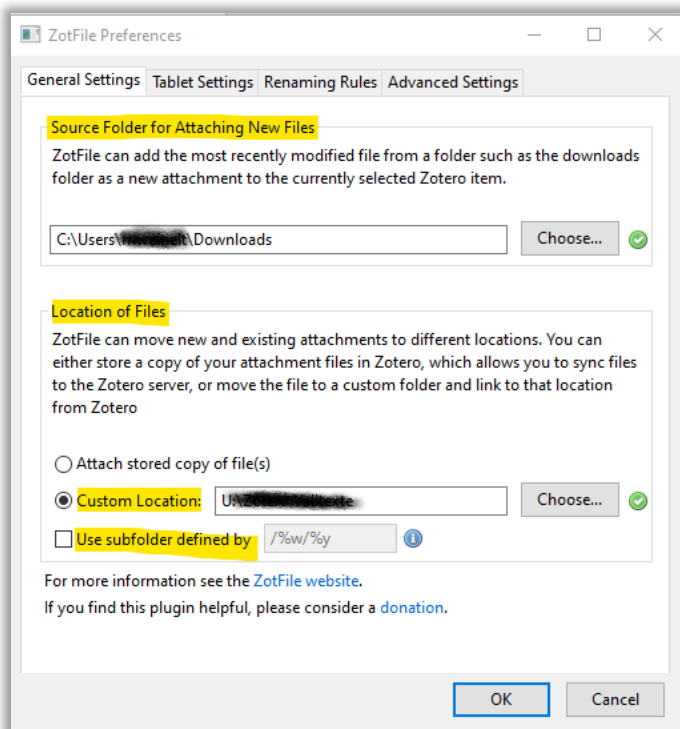
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Launch Zotero and go to **Tools** → **Add-ons** → **gear icon** (top right) → **Install Add-on From File** → Select the previously downloaded .xpi file.



Preferences

The ZotFile settings can be found in Zotero under **Tools** → **ZotFile Preferences**. Under the **General Settings** tab you will find the most important setting options:



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Source Folder for Attaching New Files

If you attach files (pdfs etc.) in Zotero, ZotFile will look for the last modified or added files in the folder specified here.

In general, any folder can be set here, but it makes sense to take your browser's download folder (see your browser's settings).

Location of Files

Among other things, ZotFile can automatically move files to a user-defined folder and then provide a link to that location in Zotero.

This ZotFile feature is very useful for those who do not want to store their PDF files exclusively in Zotero, but prefer to store them separately from Zotero (e.g. to have access to them even without Zotero).

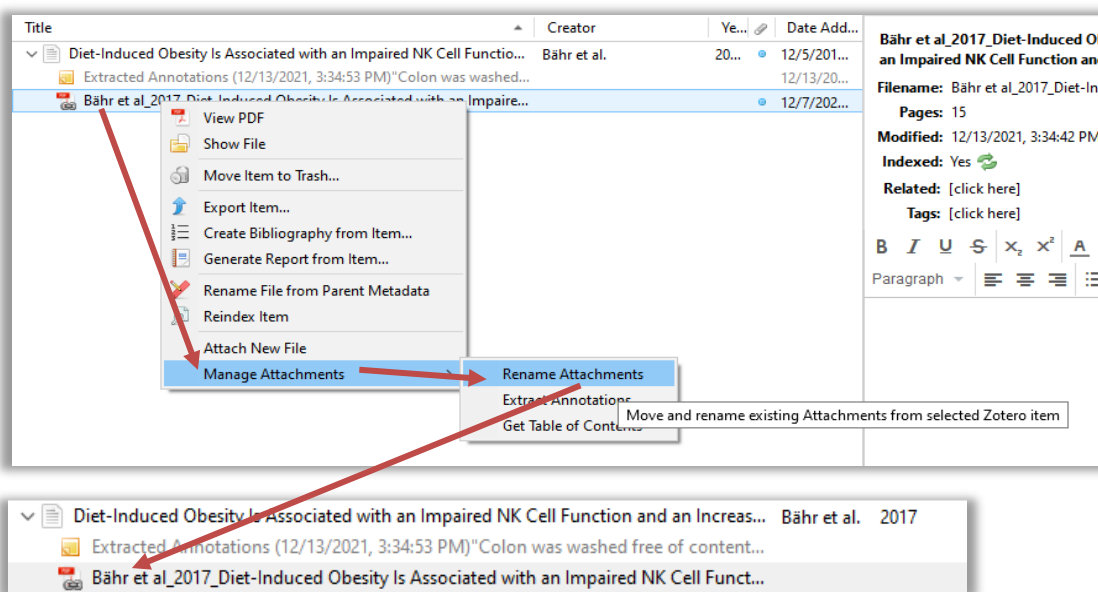
With ZotFile, you can then store these files in a location you prefer, which you may be able to access from all your devices: e.g. a cloud storage like bwsync&share, iCloud, OneDrive, Dropbox, Google Drive, and more. Zotero still knows where your PDFs files are and you can open them from within Zotero with one click.

Another nice side effect is that when using the Zotero server, you don't use the limited storage space (300 MB) for attachments.

Automatic storage in the preferred location works for new downloads as well as, if desired, for existing attachments that may have previously been stored elsewhere or only in Zotero itself.

If you want to move or link existing attachments in Zotero using ZotFile, follow these steps:

Mouse right-click → Manage Attachments → Rename Attachments:





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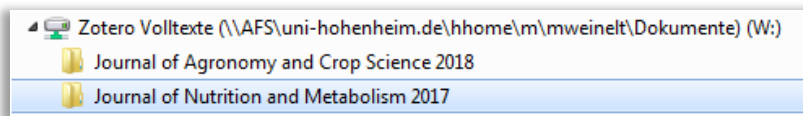
Additionally, ZotFile can automatically create subfolders in the file location you specify. To do this, select the "Use subfolder defined by ..." checkbox and specify the subfolder pattern. The possible codes for the subfolder pattern are:

- %a last names of authors (not editors etc) or inventors. The maximum number of authors are changed under 'Additional Settings'.
- %I author initials.
- %F author's last name with first letter of first name (e.g. EinsteinA).
- %A first letter of author (useful for subfolders)
- %d, %D, %L, %l wildcards for editors, same as for authors.
- %y year (extracted from Date field)
- %t title. Usually truncated after : . ? The maximal length of the remaining part of the title can be changed.
- %T item type (localized)
- %j name of the journal
- %p name of the publisher
- %w name of the journal or publisher (same as %j %p)
- %s journal abbreviation
- %v journal volume
- %e journal issue
- %f pages
- %c collection path (only for sub-folders, not file names). When item is in multiple collections, user can choose between the different collections.
- %n patent number (patent items only)
- %i assignee (patent items only)

(Source: <http://ZotFile.com/#renaming-rules>)

Example:

For example, the setting /%w /%y results in the following subfolders created by ZotFile in your custom location (here: directory in AFS as network drive W:):



The subfolders will then contain all PDFs/attachments from the same publication and year.



File-Renaming

ZotFile also always renames the files appropriately. If you want to change the automatic scheme, you can do so via the **Renaming Rules** tab in the ZotFile preferences.

Here the same codes/wildcards are used as for the creation of subfolders (see above).

The screenshot shows the 'ZotFile Preferences' window with the 'Renaming Rules' tab selected. The window has a title bar with standard OS controls and four tabs: 'General Settings', 'Tablet Settings', 'Renaming Rules' (highlighted), and 'Advanced Settings'. The main content area is divided into several sections:

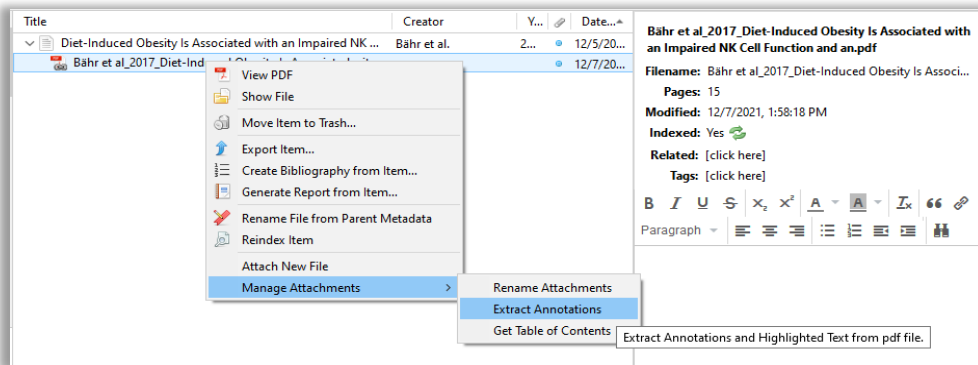
- Preview of Current Renaming Rules:** A text input field is empty, and an 'Update' button is to its right.
- Renaming Format:** A section containing a checkbox for 'Use Zotero to Rename' (unchecked).
- Format for all Item Types except Patents:** A text input field containing the wildcard format `{%a_}{%y_}{%t}`.
- Format for Patents:** A text input field containing the wildcard format `{%a_}{%y_}{%t}`.
- Legend:** A small text block explaining the wildcards: `%a` = author last name; `%y` = year; `%t` = title; `%j` = journal; use `[...]` for an optional group and `|` for exclusive matches. It also includes a link to the ZotFile website for a full list of place holders.
- Additional Settings:** A section with several checkboxes and input fields:
 - 'Delimiter between multiple authors' with a text input field containing a hyphen (`-`).
 - 'Add user input to filename. Default is' with a text input field containing 'Paper'.
 - 'Change to lower case' (unchecked).
 - 'Replace blanks' (unchecked).
 - 'Truncate title after . or : or ?' (checked).
 - 'Maximum length of title' with a text input field containing '80'.
 - 'Maximum number of authors' with a text input field containing '2'.
 - 'Number of authors to display when authors are omitted' with a text input field containing '1'.
 - 'Add suffix when authors are omitted' with a text input field containing 'et al'.

Create Notes/Annotations

Extract markups and comments from PDF files

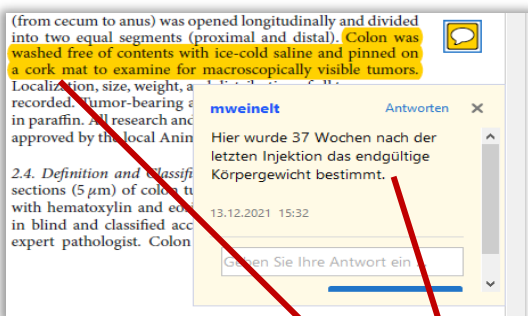
Another possibly useful feature in ZotFile is that markups and comments from PDFs can be saved as notes to the respective reference.

To do this, proceed as follows: **Select the corresponding attachment/link in Zotero → Mouse right-click → Manage Attachments → Extract Annotations:**

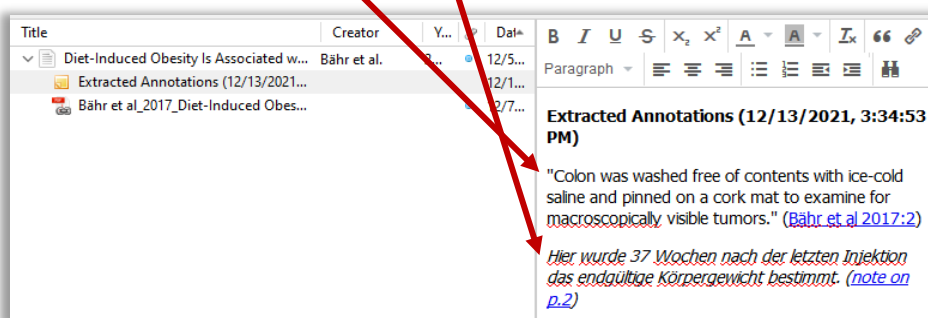


Example:

In Adobe Acrobat:



In Zotero:





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Questions and change requests?

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