

Shared citation library handoff

Agree how your team will collect, correct, share, and freeze its reference library.

Use and limits. A tool-neutral team agreement. Software formatting cannot verify that a reference supports a scientific claim. Follow institutional access and copyright rules for attachments.

WORKED EXAMPLE · FICTIONAL

Fictional project: three coauthors preparing a biomedical narrative review using a shared Zotero library.

1. Tool, writing environment, and owner

Zotero group library with the Word plugin. Lead author maintains records; one coauthor checks the final bibliography.

3. Duplicate and version decisions

Check identifiers and version before merging. Keep a preprint distinct from the journal article where they are different works; link related versions.

5. Writing and final style checks

Use plugin citations; correct the underlying record before refreshing. Check author order, dates, source type, DOI, and uncited bibliography entries.

2. Capture and organization rules

Import from publisher or database records. Collections: Background, Methods, Included. Tags: to-read, checked, needs-metadata.

4. Claim and integrity checks

Check every source supporting the principal conclusion against the full text. Record publisher notices and unresolved discrepancies in item notes.

6. Backup, permissions, and final handoff

Archive a dated library export with the final manuscript in approved project storage. Test the export; document who retains shared-library administration.

SOURCE GUIDANCE · CHECKED 2026-09-11

[Zotero: Quick Start Guide](https://www.zotero.org/support/quick_start_guide). Library organization and word-processor integration.

https://www.zotero.org/support/quick_start_guide

[Zotero: Duplicate Detection](https://www.zotero.org/support/duplicate_detection). Reviewing and merging duplicate records while retaining library information.

https://www.zotero.org/support/duplicate_detection

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[Online worksheet and current version](https://manusights.com/resources/citation-management-guide#worksheet) · [Corrections](#)

<https://manusights.com/resources/citation-management-guide#worksheet>

Shared citation library handoff

Project / date: _____

Keep completed copies private when they contain unpublished work. Use the online version for longer notes.

1. Tool, writing environment, and owner

Record the supported citation manager, writing software, shared-library location, and a responsible role.

2. Capture and organization rules

Define import sources, required record fields, collections, and a small shared tagging vocabulary.

3. Duplicate and version decisions

Explain how suspected duplicates are reviewed and how preprints, published versions, and corrections stay distinguishable.

4. Claim and integrity checks

Choose the claims needing source review. Record where publisher corrections or retraction notices were checked.

5. Writing and final style checks

Name the required style and how citation fields, bibliography completeness, and identifiers will be checked.

6. Backup, permissions, and final handoff

Record export format, backup location, access changes, and the library snapshot tied to the submitted manuscript.

BEFORE YOU USE THE RESULT

- A second author can open the library and identify the submitted version.
- Suspected duplicates were checked before merging; distinct works were not collapsed.
- Formatting checks and scientific claim checks are recorded separately.

[Open the interactive worksheet.](#) This is a planning aid; follow applicable institutional and publisher instructions.