

# Managing your references with Zotero

## Task 1: Setting up Zotero & creating an account

### 1A: Installation

You will need to install 3 separate Zotero components on your computer(s)

1. Zotero Programme
2. A plugin for your browser which makes it easy to add items to Zotero. Plugins are available for Chrome, Firefox, Safari and Edge.
3. A plugin for your Word processor (i.e., for Word, Open Office or Libre Office)

To install:

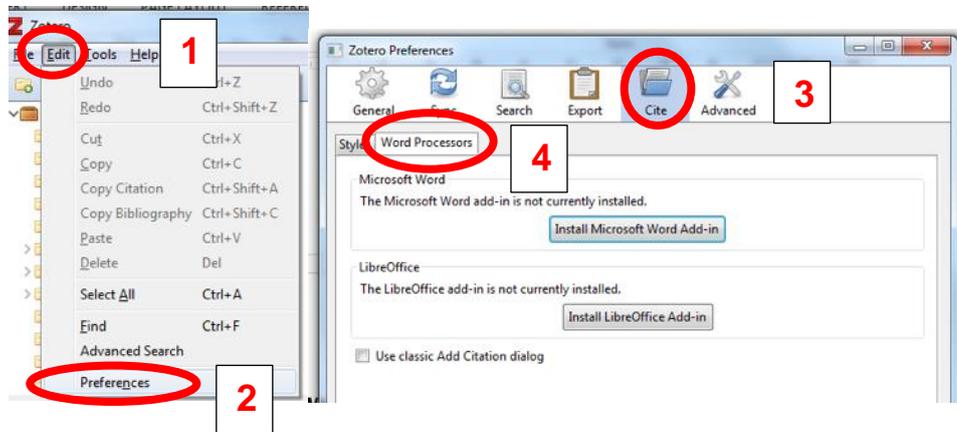
1. Go to [www.zotero.org](http://www.zotero.org) and choose **Download**.
2. **Download Zotero for Windows** (or for Mac). Download and open the file and then follow on screen instructions.



3. Next install the browser plug in. Go back to <https://www.zotero.org/download/> and choose the browser you are using. Extensions are available for Firefox, Chrome, Safari and Edge.
4. Finally, install the plugin for Word or LibreOffice/OpenOffice/NeoOffice. To do this:

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5. Open the **Zotero programme** on your computer and click **Edit/ Preferences**. In the **Cite** pane, choose **Word Processors** and click on the button for the Microsoft Word Add-in or for LibreOffice/OpenOffice/NeoOffice.



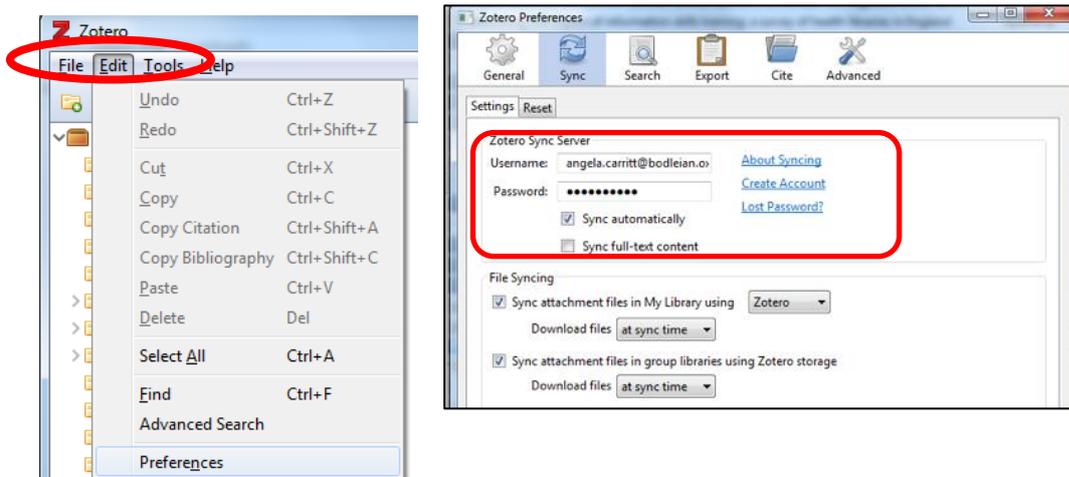
### 1B: Creating an account

If you sign up for a Zotero account, you will be able to access your Zotero Library from many different computers/devices and view your Zotero library on the web.

1. Go to [www.zotero.org](http://www.zotero.org), click **Register** (top right) and fill in the form. You will be emailed a link to complete registration
2. Now link Zotero on your computer to your Zotero account. To do this open the Zotero programme on your computer and click **Edit**, followed by **Preferences** and then **Sync**.

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### 3. Fill in your Zotero username and password



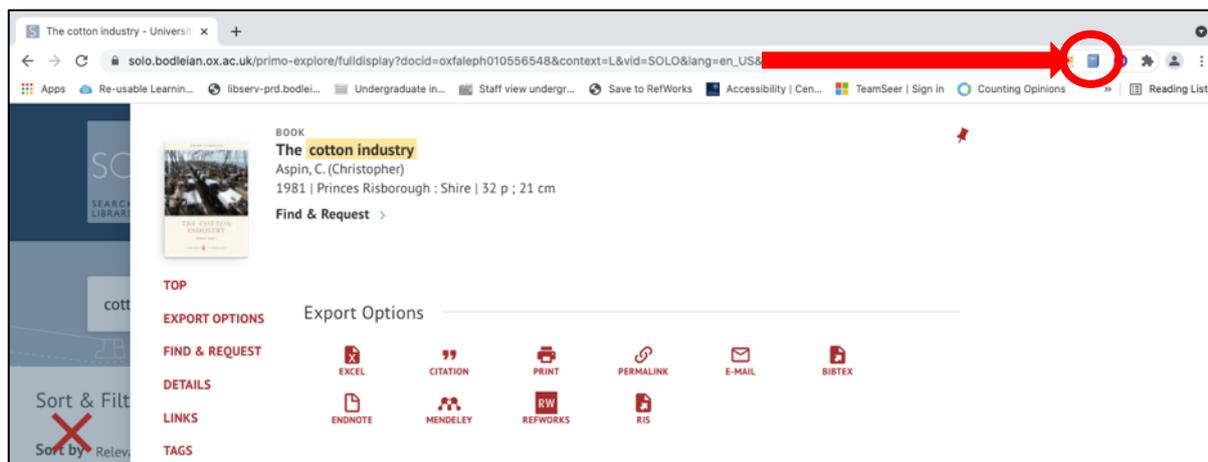
4. If you want to use Zotero on more computers, simply follow the installation steps in 1A on each computer. Once installed open Zotero and click **Edit / Preferences / Sync** and fill in your Zotero username and password (as in 1B above). Your Zotero Library will then synchronise across the computers.

## Task 2 - adding & organising references

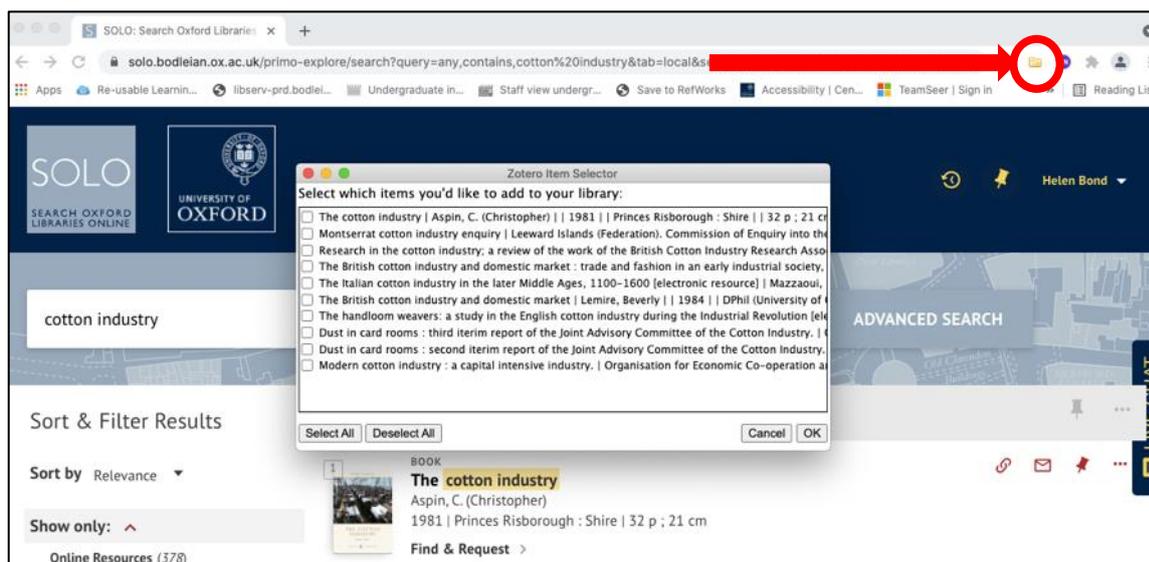
### 2A: Adding references using the web plugin

1. Open Zotero. Then, open the browser for which you installed the addin.
2. Go to Oxford's library catalogue SOLO: <http://solo.bodleian.ox.ac.uk>
3. Search for books or journal articles on a topic of your choice.
4. Select one item by clicking on its title. (Note: you should now only see one item in your browser not the full results list)
5. Click on the book icon  in your browser (note: in Windows this is likely to be in the top right of the screen, for Mac it may be in the address bar).

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6. The reference will now be saved to your Zotero library.
7. Use the back button in your browser to return to your search results
8. Click on the **folder icon**  in your browser. A pop-up window should appear with a list of the items in your search results. Select which items to add and click **OK**.



9. This method of adding references to Zotero will work for most databases and scholarly search engines. Try out your favourite databases (e.g. Proquest, Scopus, Web of Science, EBSCO etc.) and/or Google Scholar.
10. Add a webpage to your collection. Type in any URL and click on the page icon  in your browser. Note, some browsers will display a drop down menu next

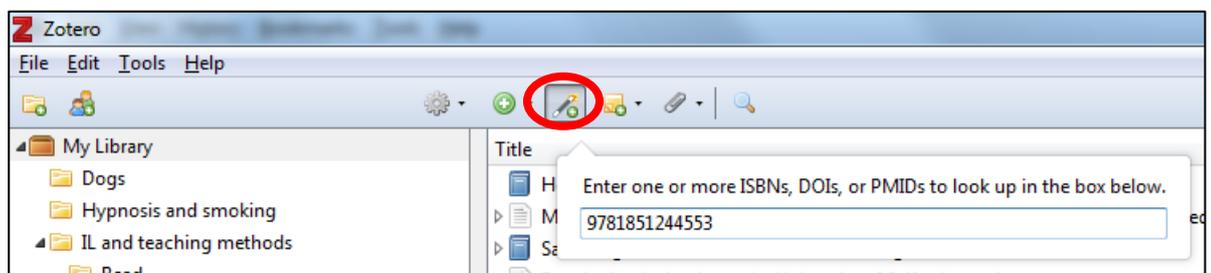
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to the icon, offering you the option to save the reference with or without a snapshot of the webpage. Others will save the reference with the snapshot without offering you a choice. The snapshot is a picture of the web page and can be viewed offline.

### 2B: Adding references using standard numbers

1. You can also add references from identifier numbers like ISBN, DOI, or PubMedID.

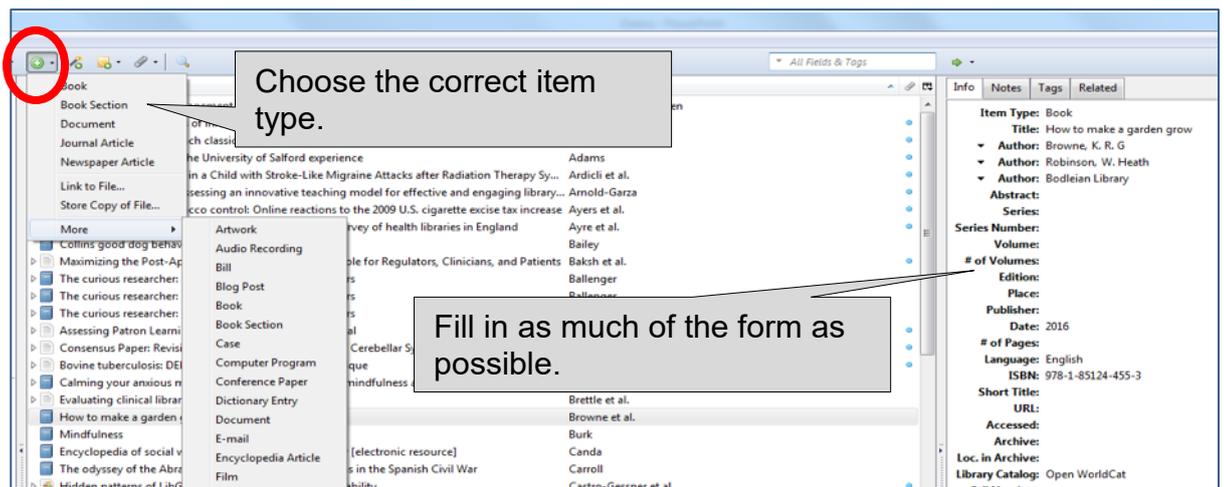
In Zotero, click on the **magic wand icon** . Type in an ISBN, DOI, or a PubMedID. For example, type in 9780205172870. You should see your added reference appear in the middle column.



### 2C: Adding references manually

1. You can also add references manually. Click on the **green plus icon**  at the top of the Zotero pane. Choose the type of item you want to add from the drop-down menu. In the right column, you can now add details, such as author, title, etc.

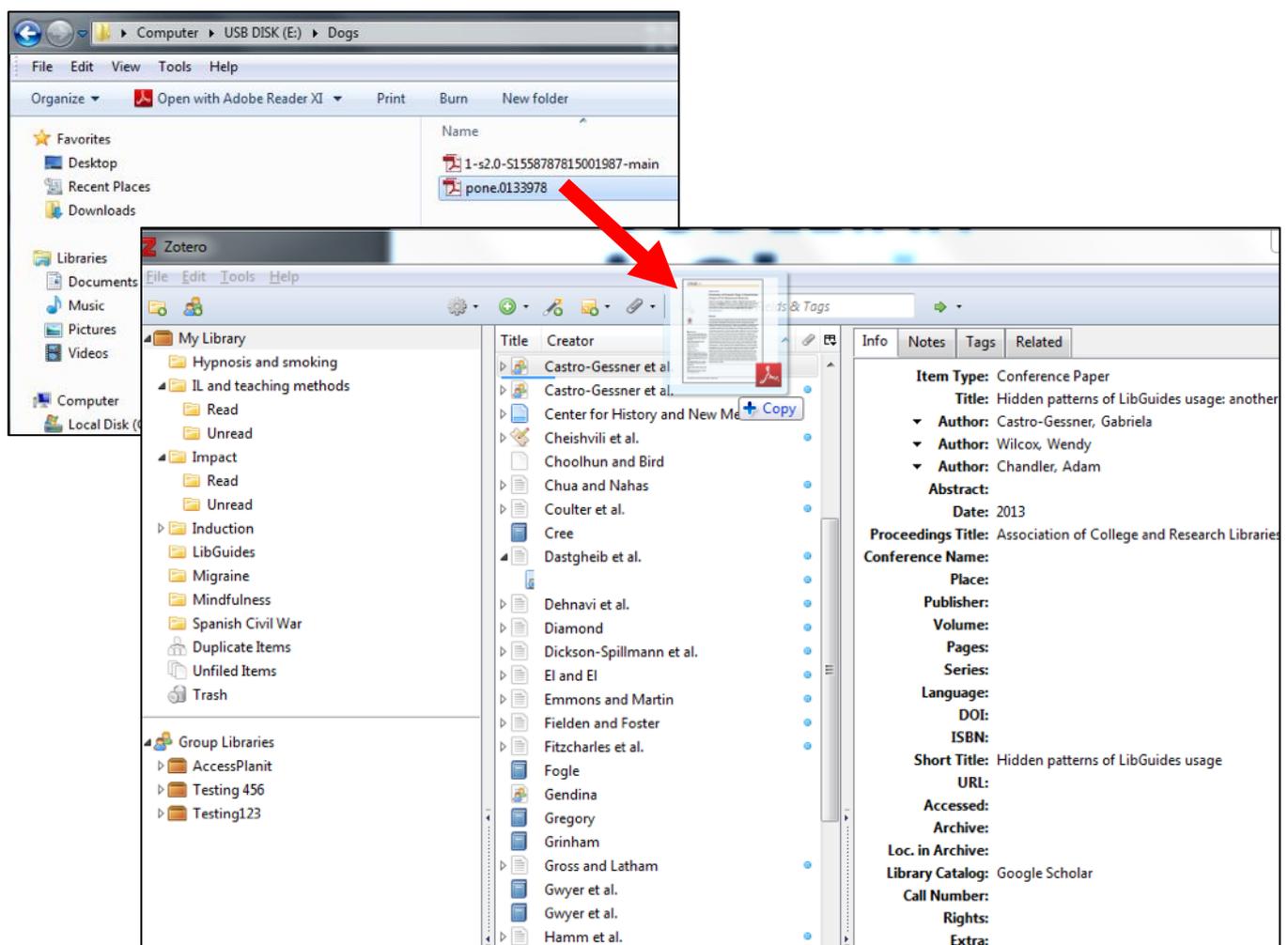
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### 2D: Adding references by dragging and dropping PDFs

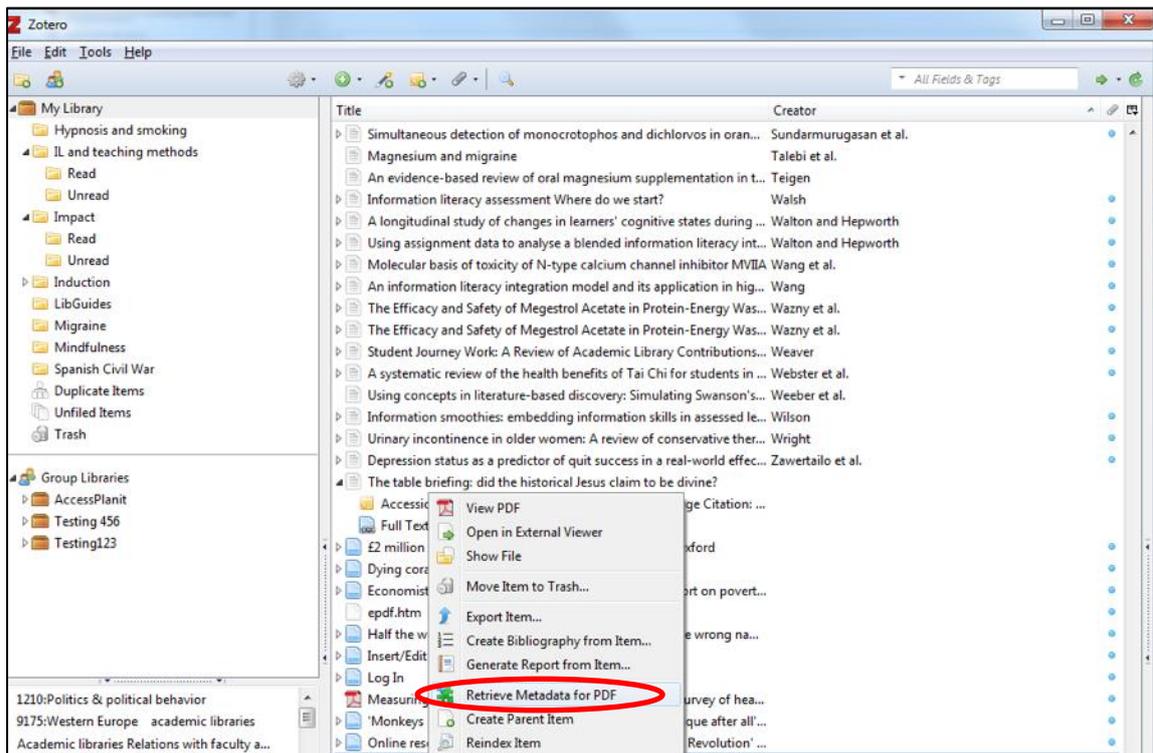
If you have downloaded PDF journal articles from publisher web sites, Zotero can often find matching bibliographic information. However, it can't do this for scanned PDFs or for other document types such as reports

1. Drag an existing PDF for a journal article to the middle column of Zotero.



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2. Right click on the PDF and from the drop-down menu, select **Retrieve Metadata for PDF** and follow the instructions.
  - Note: The first time you use this feature, you may be prompted to install additional tools to support this function. If this happens follow the on-screen instructions to install the PDF indexing tool. After the installation, you will need to right click on the PDF again and choose **Retrieve Metadata for PDF**.



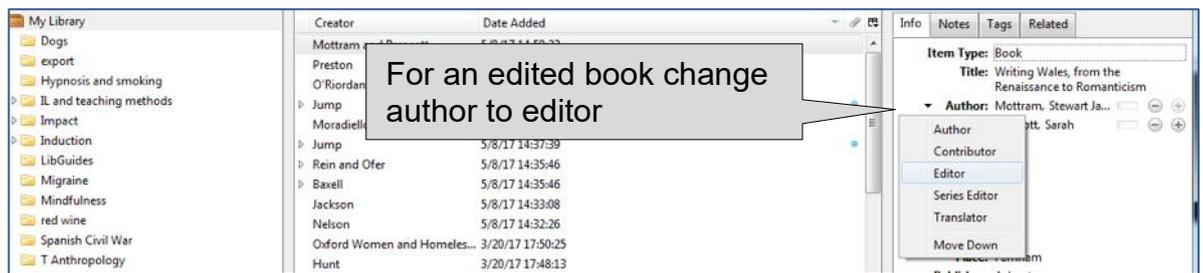
3. Zotero will retrieve the bibliographic information for the PDF and add it to your library.

### 2E: Editing your references, edited collections and book chapters

1. It's important to check all the references that you add to Zotero for accuracy. If there is a mistake in a reference in Zotero this will be carried through to your citations and bibliographies.
2. Be sure to check records for **edited books** added to Zotero from SOLO or other Library catalogues. All books will automatically be added to Zotero with

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an author field. This needs to be changed to editor, so that the reference is correct.



### 3. To add a chapter from an edited book

- choose **Item Type** 'Book section'
- manually enter the chapter title, chapter author and amend any editors who are listed as authors
- add the page numbers

Change 'Item type' to book section

Enter the chapter title manually

Enter the name(s) of the chapter author(s). Make sure book editors are listed as editors

Add page numbers

## 2F: Organising your references-using collections

1. Click on the create collection icon  (top left corner) to create a new collection. Give it a name.
2. Click on **My Library** to view your references again.

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3. Drag a few references from the middle column into your newly created collection.
4. Remove a reference from your collection by **right-clicking** it and selecting **Remove item from collection**.
5. Remove an item from your Zotero library by **right-clicking** it and selecting **Move item to trash**.

Note: References may be added to several collections. This does not duplicate the item in “My Library”.

### 2F: Organising your references - using tags

1. To add a tag, select a reference and select the **Tags** tab in the right column. Click on the **Add** button and enter a keyword.
2. Repeat this process a few times: add several keywords to your references, and assign the same keyword to at least two references.
3. Use the tag selector in the bottom-left corner of the Zotero pane to see all of your tags. Click on any of the tags to filter the items in your library or in a particular collection. The centre column should now update to display only the items with that tag.

Note: Some references that you save will come with tags already attached. You can switch off the automatic download of tags by selecting **Edit / Preferences**. On the **General** pane, untick the box next to **automatically tag items with keywords and subject headings**.

### 2G: Annotating your references: adding notes

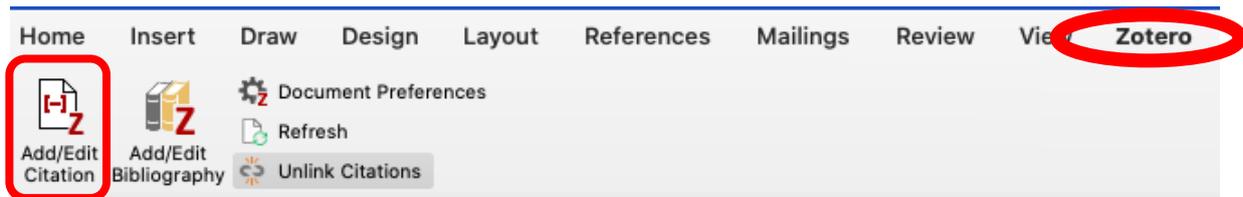
1. To add a note about one of your references, select the reference and select the **Notes** tab in the right column. Click on the **Add** button and write a note.

## Task 3 - Citations and bibliographies

### 3A: In-text citations

1. Open up MS Word and create a new document.
2. Type some text and put your cursor where you want to insert the citation.
3. Click the **Zotero** tab in the MS Word Toolbar.

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Click **Add/Edit citation**

4. You will be prompted to choose a citation style.
5. A pop-up textbox will appear. If you know the title or author of the reference you want to insert, start typing, select the appropriate reference and hit **Enter** on your keyboard.

a. Search for the appropriate reference by typing a keyword (e.g., author name, title keyword).

b. Alternatively, click on the Z to switch to Classic view, where you can browse your folders to find references.

6. Alternatively, if you can't remember the author/title of the reference click on the drop-down menu within the text box and select **Classic View** to browse your Zotero library.

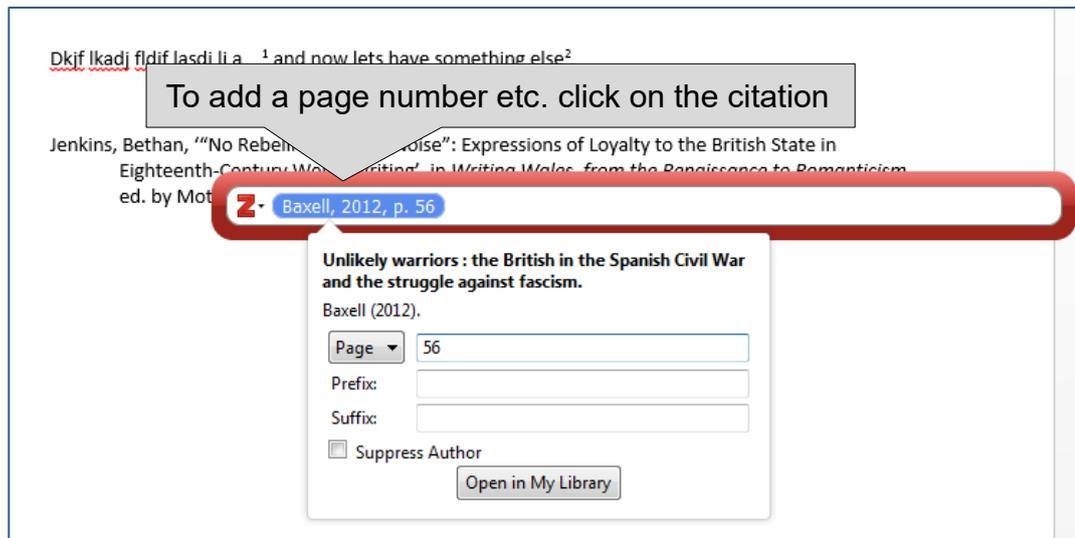


7. To change citation style: in the Zotero toolbar, click **Document preferences**, select a citation style from the list and click **OK**.

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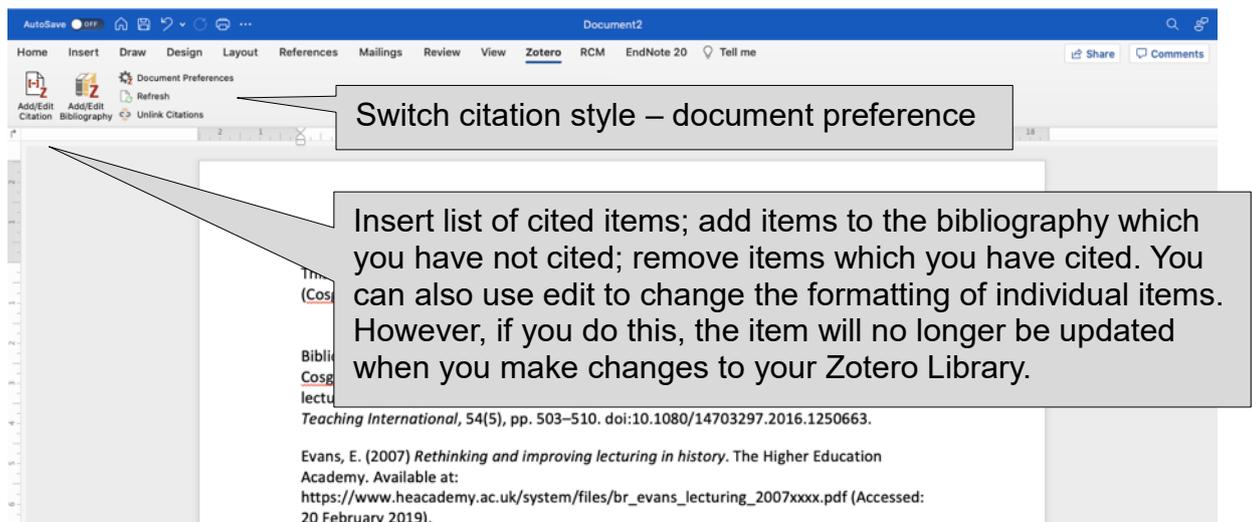
### 3B: Adding page numbers, prefixes and suffixes to references

1. To add a page or chapter number, prefix or suffix, click on the citation in the Zotero dialogue box. This will open a box where you can add page numbers etc and text as a prefix or suffix.



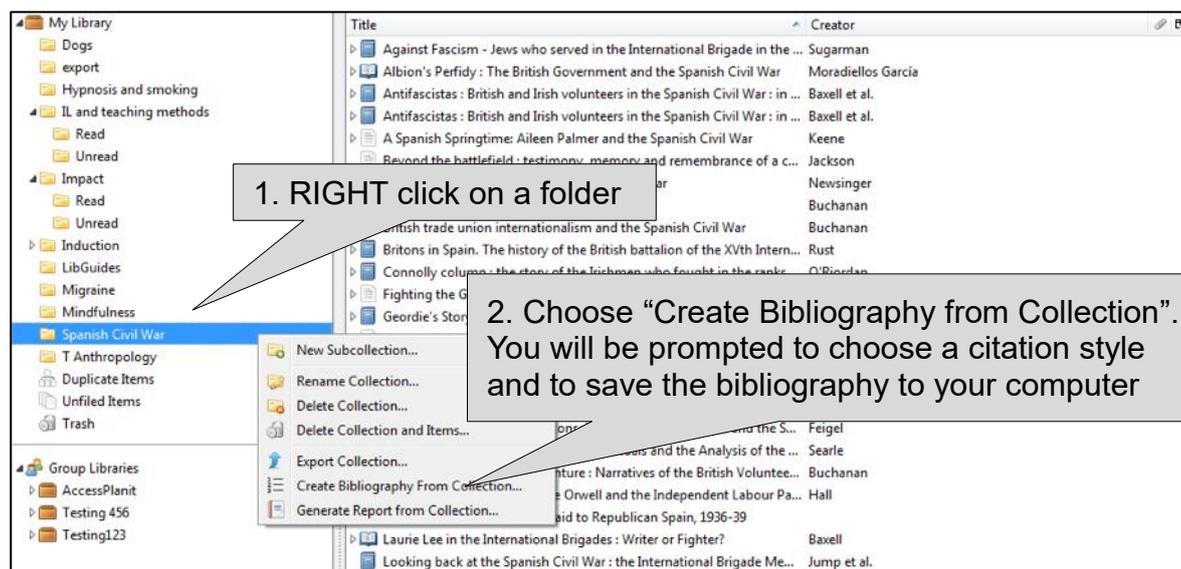
### 3C: Creating a bibliography

1. Add a few more references to your document following the steps in 3A.
2. Put your cursor at the bottom of the text (where you would like your bibliography to appear).
3. In the Zotero toolbar, click **Insert bibliography**. This will create a bibliography of the items you have cited in your document.



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4. You can also create a bibliography from within Zotero. To do so open Zotero and right click on a folder. Then select **Create bibliography from collection** and choose a citation style, output mode and method



### 3D Getting more citation styles

If you can't find the citation style that you want to use, you can install more styles from the Zotero site.

1. Go to <https://www.zotero.org/styles>
2. Right-click on a citation style of your choice and select **Save link** to download the style.
3. Make sure Zotero is running. Then double-click the downloaded file to install the new style.

### 3E: Adding single citations quickly

1. If you want to add a citation quickly to any document, you can use the **drag and drop** function. Create a new email, Google document, or MS Word document and set your cursor where you would like to insert a reference.
2. Open Zotero and drag a reference from the middle column into your document. The full citation should now appear in your document.

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3. The citation will appear in the reference style set in your Zotero Preferences. To set your Zotero preferences choose **Edit, Preferences** and choose **Export**. Then choose a reference style under **Default Format**.

### Task 4 – Synchronising Zotero

If you set up a Zotero account in task 1 you can use this to access and use your Zotero Library from many computers/devices and to view your Zotero library on the web.

You will also need to have an account and to use the sync option in Zotero if you want to share references with others.

To synchronise Zotero:

1. Make sure you have created a Zotero account and associated this with Zotero on your computer (by following the steps in Task 1B).
2. Click the green Sync icon in the top right corner of Zotero  When you click the Sync icon, Zotero will synchronise your Zotero Library so that all references appear on your computer and any other computers or devices you use for Zotero and on Zotero online.
3. Go to <https://www.zotero.org/> and choose Log in (top right-hand corner). Once you have logged in you will see the online version of your Zotero Library.
4. If you want to use Zotero on another computer, follow the steps in task 1 to install it on the new computer.

### Task 5 - Collaborating & additional features

5A: Creating a group to share references with others

1. To create a group, go to the Zotero web site at <https://www.zotero.org/> and log in with your username and password
2. Click the three-line hamburger menu button in the top right and choose **Groups** from the pane that expands from the right. In the new page that opens, click **Create a New Group**.
3. Enter a name for your group and select the type of access you want. For example, a **public open group** can be joined by anyone; a **public closed**

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**group** allows anyone to apply to join and **private membership** is restricted to people you have invited to join. When you have made your selection, click **Create Group**.

4. This will take you to a page with more granular access options, for example, where you can decide who can edit any references added to the group. Choose appropriate options and click **Save Settings**
5. Next click **Manage Members** to invite someone to your group. Click **Send More Invitations**, provide email addresses and then click on **Invite Members**. Note, members will also need to create Zotero accounts.
6. If you want to add a description, photograph or to change the name of the group click **Group Settings**.
7. For your group to appear in the desktop version of Zotero, open the Zotero programme on your computer and click the Sync icon  in the top right corner to synchronise your Zotero account.
8. You should see your newly created group folder appear in the left-hand column (beneath any collections that you have set up).
9. To add a reference to the group, drag a reference from the middle column into your newly created group and then force another sync by clicking on the sync icon . The reference should now be shown on the Zotero website under your new group. Anyone who you have invited to join your Zotero group will now be able to see this reference.

### 5B: Editing citation styles

1. Go to <http://editor.citationstyles.org/about/>
2. Search for the style you would like to edit and click the **Edit** button.
3. Try editing the template. Click on **Refresh** to see a live preview of citations.

### 5C: Importing references from text files (.ris, .bib, etc.)

Note, this is mainly used when moving from one another reference manager (e.g. RefWorks, Endnote, Mendeley) to Zotero. To try out this task, you need to already have your references in some other reference manager or text format. Ask staff if you have any questions.

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1. First open your old reference manager (e.g., Endnote, RefWorks or Mendeley). Find the option for exporting references and follow on-screen instructions. This will enable you to save a file containing all your references to your computer.
2. Open the Zotero programme and choose **File / Import**
3. Browse your computer to find the file that you saved from your old reference manager
4. Select **Open**.
5. The references from your old reference manager will then be imported in to Zotero.

### Useful links

Zotero Bodleian LibGuide: <http://libguides.bodleian.ox.ac.uk/reference-management/zotero>

Zotero quick start guide: [http://www.zotero.org/support/quick\\_start\\_guide](http://www.zotero.org/support/quick_start_guide)

Zotero video tutorials: [http://www.zotero.org/support/screencast\\_tutorials](http://www.zotero.org/support/screencast_tutorials)

For further help in using Zotero contact [reference-management@bodleian.ox.ac.uk](mailto:reference-management@bodleian.ox.ac.uk)