Referencing: Zotero

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Andy Kernot - Subject Consultant for Geography, Social Policy and Intervention, Public Policy & Internet Studies

George Kiddy – Digital Services Librarian

reference-management@bodleian.ox.ac.uk

Session outline

Part 1 – Collecting references

Part 2 - Creating bibliographies

Part 3 – Collaborating & other features

Part 4 – Any Questions?
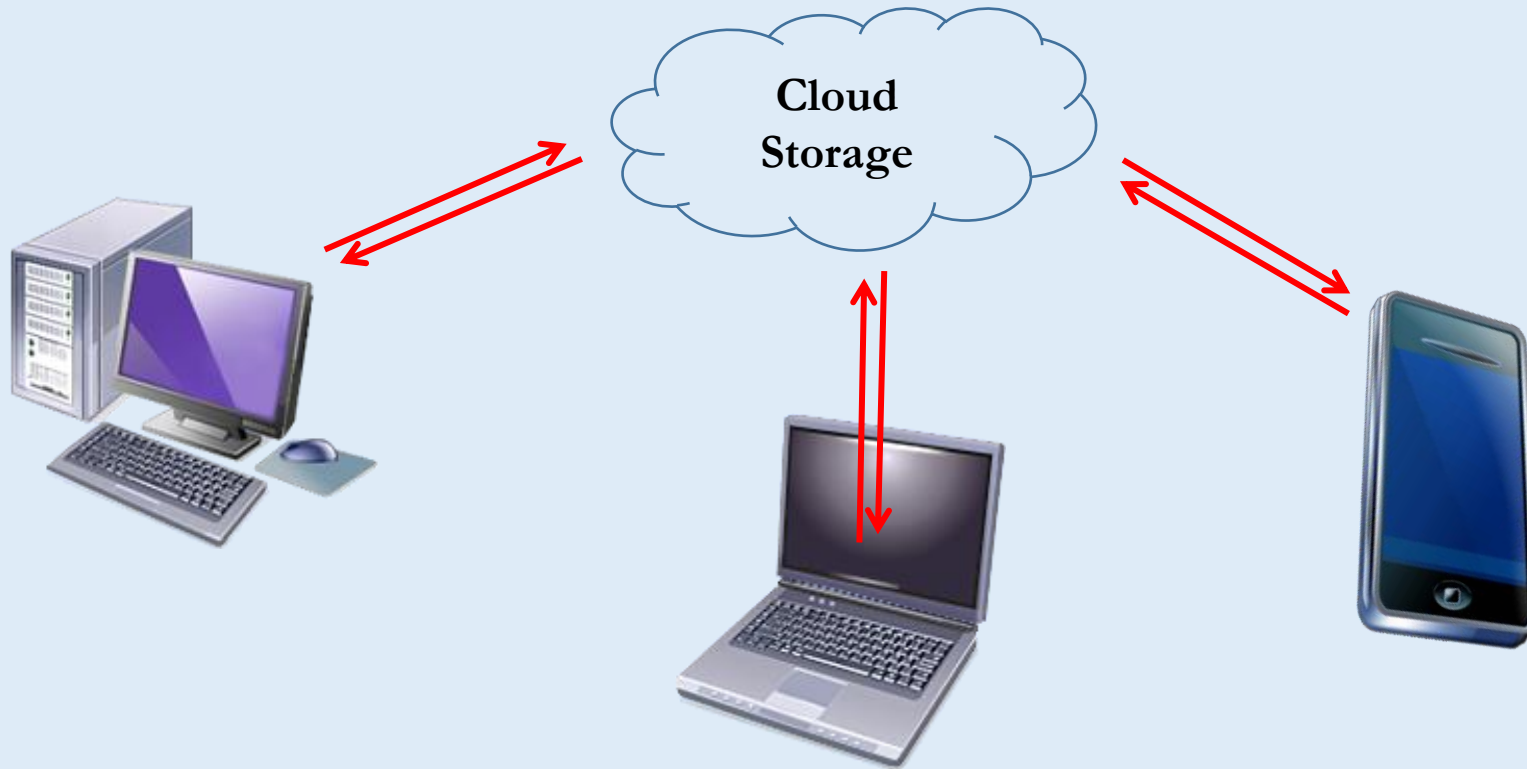
Zotero pros and cons

Pros

- Online and offline access to your Library from multiple devices
- Free (for a basic account)
- Available for Windows, Mac and Linux
- Compatible with MS Word, Google Docs, Libre Office and Open Office

Cons

- Does not work with Pages
- Subscription fees required if you need to store more than 300MB of data

Zotero cloud storage

Part 1: Getting references into Zotero

Editing and organising references

A quick tour of Zotero

Toolbar and menus

List of documents in selected folder or library

Bibliographic information about the currently selected document

Navigate collections and groups

Filter by tags

Options for adding references to Zotero

Data capture (databases, catalogues, web pages)

Add PDF files (Zotero will find matching bibliographic details for articles downloaded from databases)

Standard identifier (ISBN, DOI, etc.)

Manual entry

Import text files (.RIS/.BIB)

Web capture from databases/catalogues (e.g. Hist Abs)

To add items to Zotero from a results list in a database or catalogue
1. Click on the folder icon near to (or within) the address bar
2. This will open a pop-up menu listing all the items on the page
3. Tick the items you wish to add to Zotero and click OK

Web capture from databases/catalogues (e.g. SOLO)

To add items to Zotero from a results list in a database or catalogue
1. Click on the folder icon near to (or within) the address bar
2. This will open a drop-down menu listing all the items on the page
3. Tick the items you wish to add to Zotero and click OK

SOLO – Amendments to edited collections

Books added from library catalogues such as SOLO will always use the "author field". For edited collections you will need to manually change 'Author' to 'Editor'.

SOLO – amendments to book chapters

Change "Item Type" to "Book section"

Enter the chapter title by hand

Add the name of the chapter author(s). Make sure that the book editor(s) are listed as editor(s)

Add page numbers

Web capture: web pages

1. Open Zotero
2. In your web browser, click on the page icon near to (or within) the address bar. Note if you are adding a book, journal article, video or newspaper article the icon will change appropriately (e.g. to a book, video etc icon)
3. The item will be added to your Zotero Library. Zotero will also take a snapshot of the page

Adding references by dragging and dropping PDF files

You can add references to Zotero by dragging and dropping PDFs into your Library. Zotero will "find" matching bibliographic details for pdf journal articles downloaded from databases. It will not find details for other PDFs (e.g. book chapters, reports and documents or photocopied/scanned items).

1. Drag a PDF from your computer into the centre column of Zotero. (Make sure that you drop the pdf in-between items in your library rather than directly on top. If you drop the pdf on top it will be added to an existing reference!)
2. Find the pdf in your Zotero Library
3. **Right click** on it and choose "Retrieve Metadata for PDF"
4. Zotero will then find matching bibliographic details.
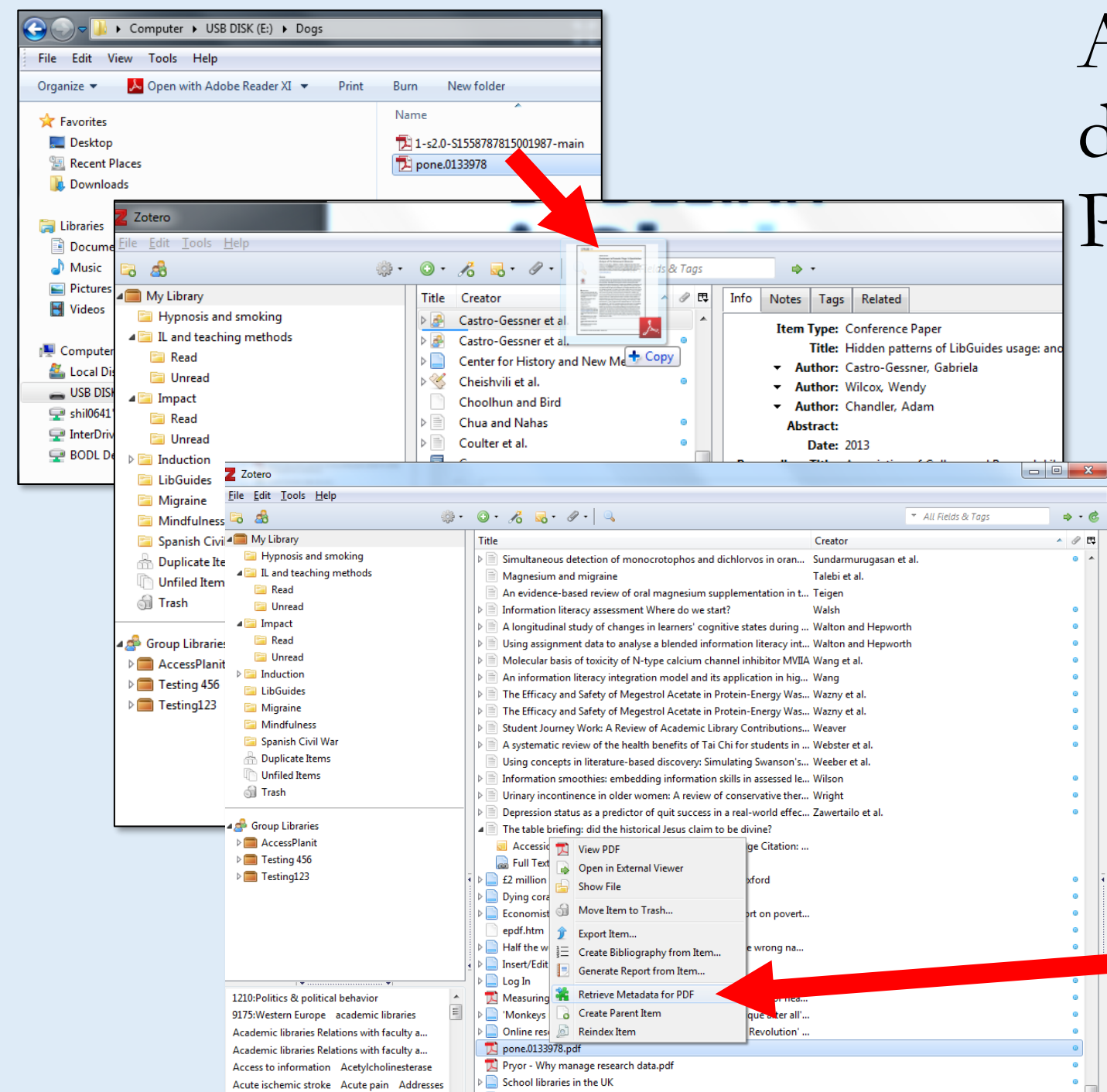
Adding a reference manually

Choose the correct reference type

Fill in as much of the form as possible

Adding a reference using ISBN, DOI or PMID
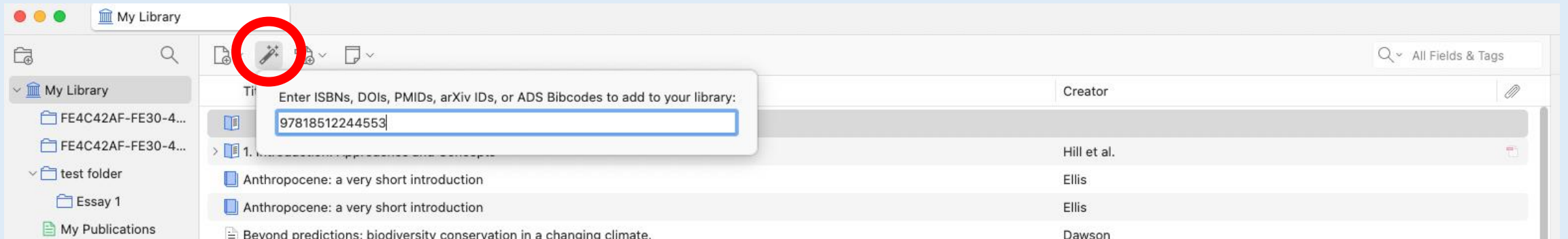
Importing a RIS, BIB or TXT file

- Use for importing references from other reference managers (e.g. RefWorks, Endnote, Mendeley etc.)
- To import references from databases which do not work with the Zotero web capture tool

1. In the database/reference manager
    - Export items as a "RIS", "BIB" or "TXT" file
    - Save the file to your computer (e.g. to the downloads folder)
2. In Zotero
    1. Click File / Import
    2. Browse to find the RIS/BIB/TXT file that you saved to your computer.

What are RIS and BIB files?

- An RIS or BIB file is a text file containing encoding that enables Zotero and other Reference Managers to read the data within:

```
TY  - RPRT
A1  - Esparza,J.
T1  - Report of a WHO workshop on the measurement and significance of neutralizing antibody to HIV and SIV,
London, 3-5 October 1988
Y1  - 1990
VL  - 4
SP  - 269
EP  - 275
RP  - Not In File
CY  - San Francisco CA
PB  - UC Berkeley
KW  - HIV
KW  - SIV
KW  - AIDS
T3  - World Health Organisation Global Programme on AIDS
ER  -

TY  - CHAP
A1  - Franks,L.M.
T1  - Preface by an AIDS Victim
Y1  - 1991
VL  - 10
SP  - vii
EP  - viii
RP  - Not In File
T2  - Cancer, HIV and AIDS.
CY  - Berkeley CA
PB  - Berkeley Press
KW  - HIV
KW  - AIDS
M1  - 1
M2  - 1
SN  - 0-679-40110-5
ER  -
```

Make sure you save the file as
Type: Text File

File name:	PlainText.txt
Save as type:	Plain Text (*.txt)

Authors: Daniel Mycock   Tags: Add a tag   Title: Add a title

∧ Hide Folders   Tools ▼   Save   Cancel

Editing references

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Organising references

You can create **Collections** (like folders) and/or use **Tags**

Collections allow you to organise your references hierarchically e.g. by project or essay.

Tags allow you to form ad-hoc collections *after* adding items to your library
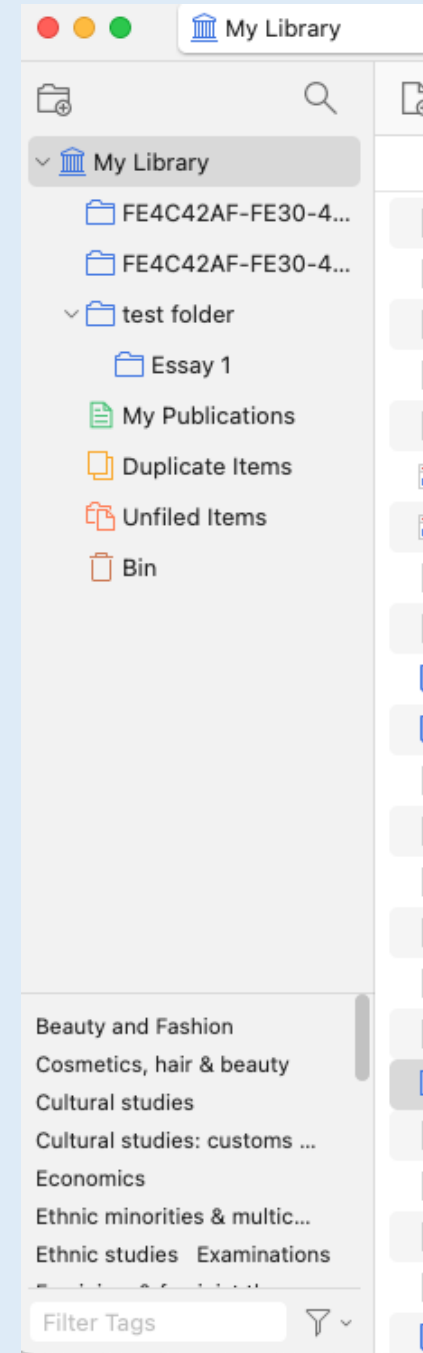
Switching off automatic tag import

- By default, Zotero imports tags from Library catalogues and databases

- Switch this off from the toolbar in Edit / Preferences
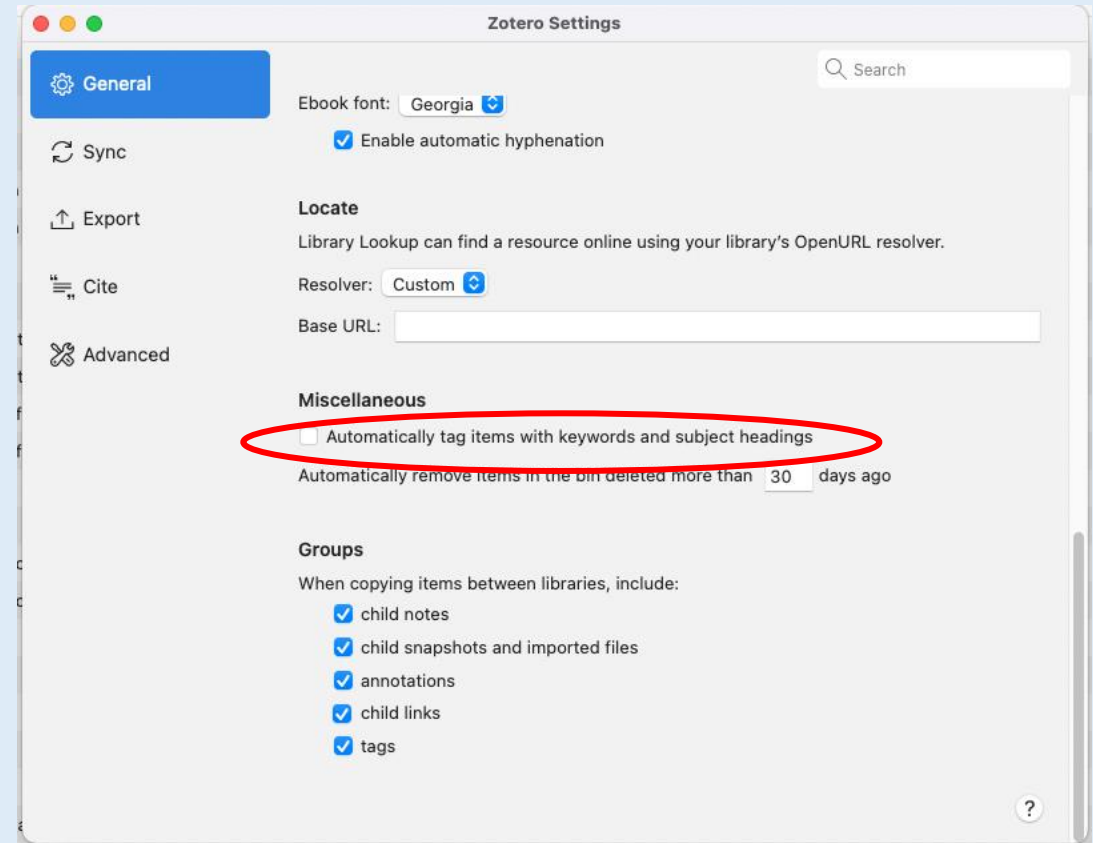
Searching your library

- You can search for documents in your Zotero library

- You can also filter your records within a folder

- You can add your own tags to records to make them easier to find
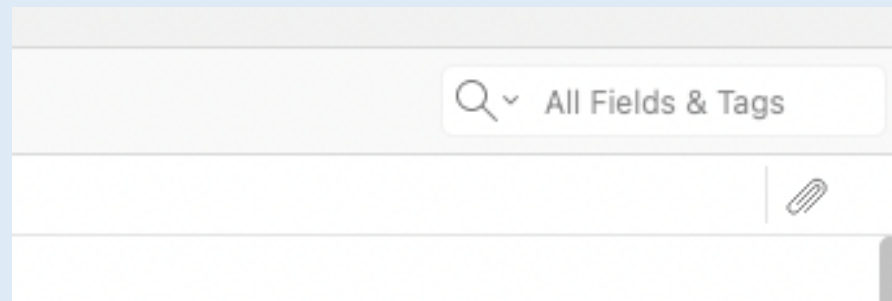
Part 2: Creating bibliographies

- Adding in-text citations & footnotes
- Inserting bibliographies and changing citation styles

Add citations to documents

- For essays/papers – use the Word or Libre Office/Open Office plug in. To install from:
  - Windows: Edit > Preferences > Cite.
  - Mac: Zotero > Preferences > Cite > Word Processors
- Alternatively you can drag and drop references from Zotero into Word, email etc.
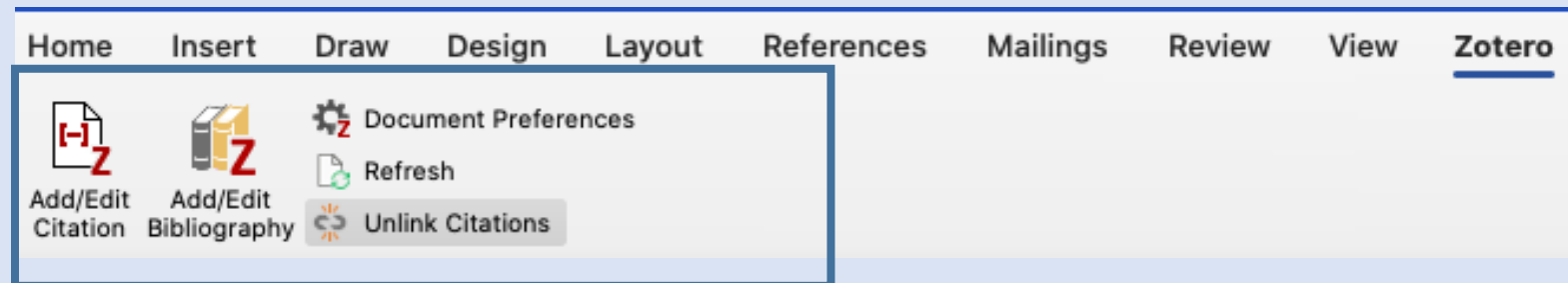
Inserting citations in Word

Home   Insert   Draw   Design   Layout   References   Mailings   Review   View   **Zotero**   RCM   EndNote 20   💡 Tell me   ⬈ Share   💬 Comments

⚙ Document Preferences

Add/Edit Citation   Add/Edit Bibliography   🗘 Refresh   ⟳ Unlink Citations

1. Click Zotero

2   1   1   2   3   4   5   6   7   8   9   10   11   12   13   14   15   16   17   18

2. Click Add/Edit Citation. The first time you do this you will be prompted to choose a citation style

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

My Dissertation

Z ⌄ lib

My Library

Maynooth, the 'Godless colleges' and liberal imper...
Biel (2018), *Irish Historical Studies*, 42(161).

Maynooth, the 'Godless colleges' and liberal imperial thought in the 1840s
Biel (2018), *Irish Historical Studies*, 42(161), 26–49.

Workshops and classes: Referencing: EndNote
Bodleian Libraries (2019).

Workshops and classes: Bodleian iSkills

4. Alternatively, click on the Z to switch to Classic view (where you can browse your collections) to find references

Adding page numbers etc. to citations

Dkjf lkadj fldjf lasdj lj a   [1] and now lets have something else

Jenkins, Bethan, '"No Rebellious Jarring Noise": E~~ssions~~
Eighteenth-Century Welsh Writing' ~~Writing Wales, from the Renaissance to Romanticism~~
ed. by Mot

Z - Baxell, 2012, p. 56

Click on the citation. This will open up a dialogue where you can add pages numbers, prefix, suffix etc.

Unlikely warriors : the British in the Spanish Civil War and the struggle against fascism.
Baxell (2012).

| Page ▼ | 56 |

Prefix:

Suffix:

☐ Suppress Author

Open in My Library

Adding a bibliography in Word

AutoSave OFF · Document2 · Search · Share · Comments

Home | Insert | Draw | Design | Layout | References | Mailings | Review | View | **Zotero** | RCM | EndNote 20 | Tell me

Add/Edit Citation · Add/Edit Bibliography · Document Preferences · Refresh · Unlink Citations

Switch citation style – document preference

Insert list of cited items; add items to the bibliography which you have not cited; remove items which you have cited. You can also use edit to change the formatting of individual items. However, if you do this, the item will no longer be updated when you make changes to your Zotero Library.

This is my essay. I am going to insert a reference here (Evans, 2007) and another one here (Cosgun Ögeyik, 2017). Perhaps another one here (McKeachie and Gibbs, 1999).

Bibliography

Cosgun Ögeyik, M. (2017) 'The effectiveness of PowerPoint presentation and conventional lecture on pedagogical content knowledge attainment', *Innovations in Education and Teaching International*, 54(5), pp. 503–510. doi:10.1080/14703297.2016.1250663.

Evans, E. (2007) *Rethinking and improving lecturing in history*. The Higher Education Academy. Available at: https://www.heacademy.ac.uk/system/files/br_evans_lecturing_2007xxxx.pdf (Accessed: 20 February 2019).

Creating a bibliography in Zotero
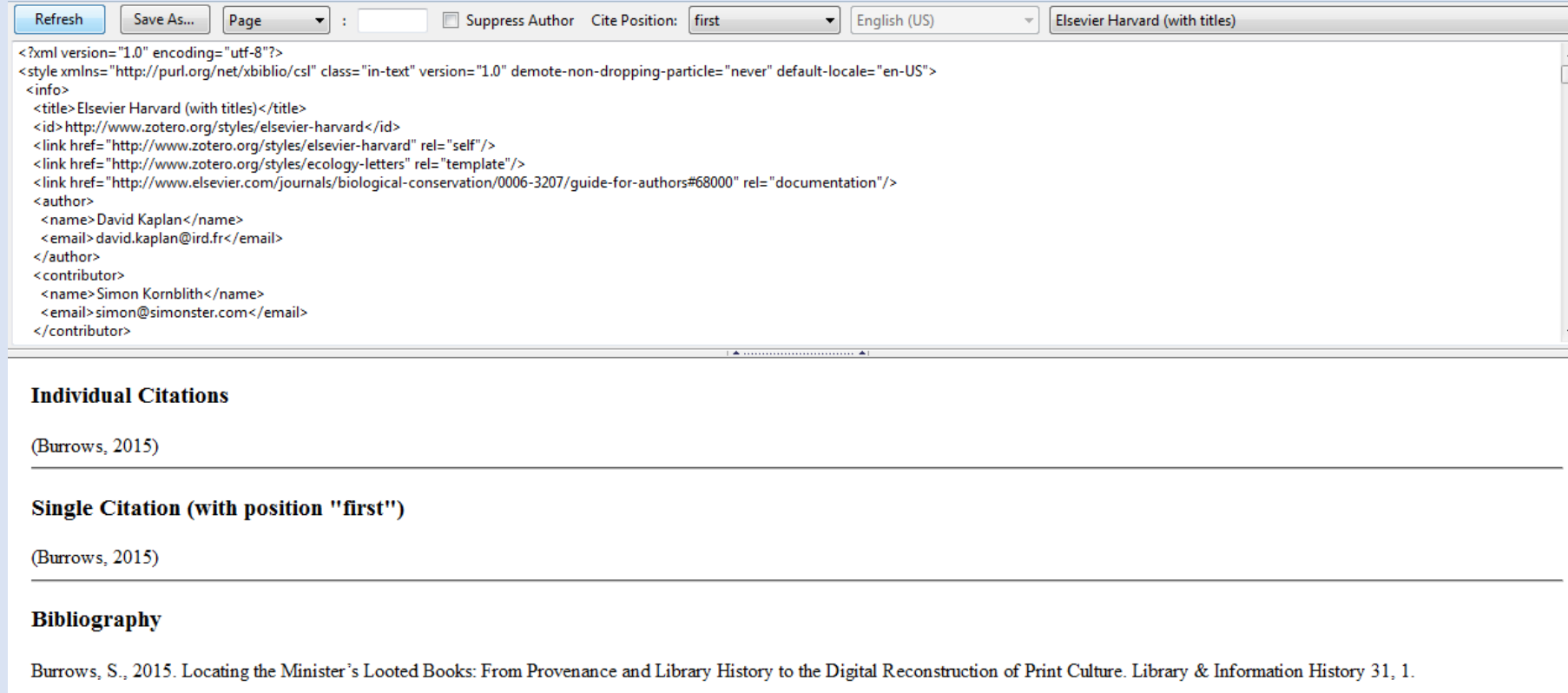

1. RIGHT click on a folder
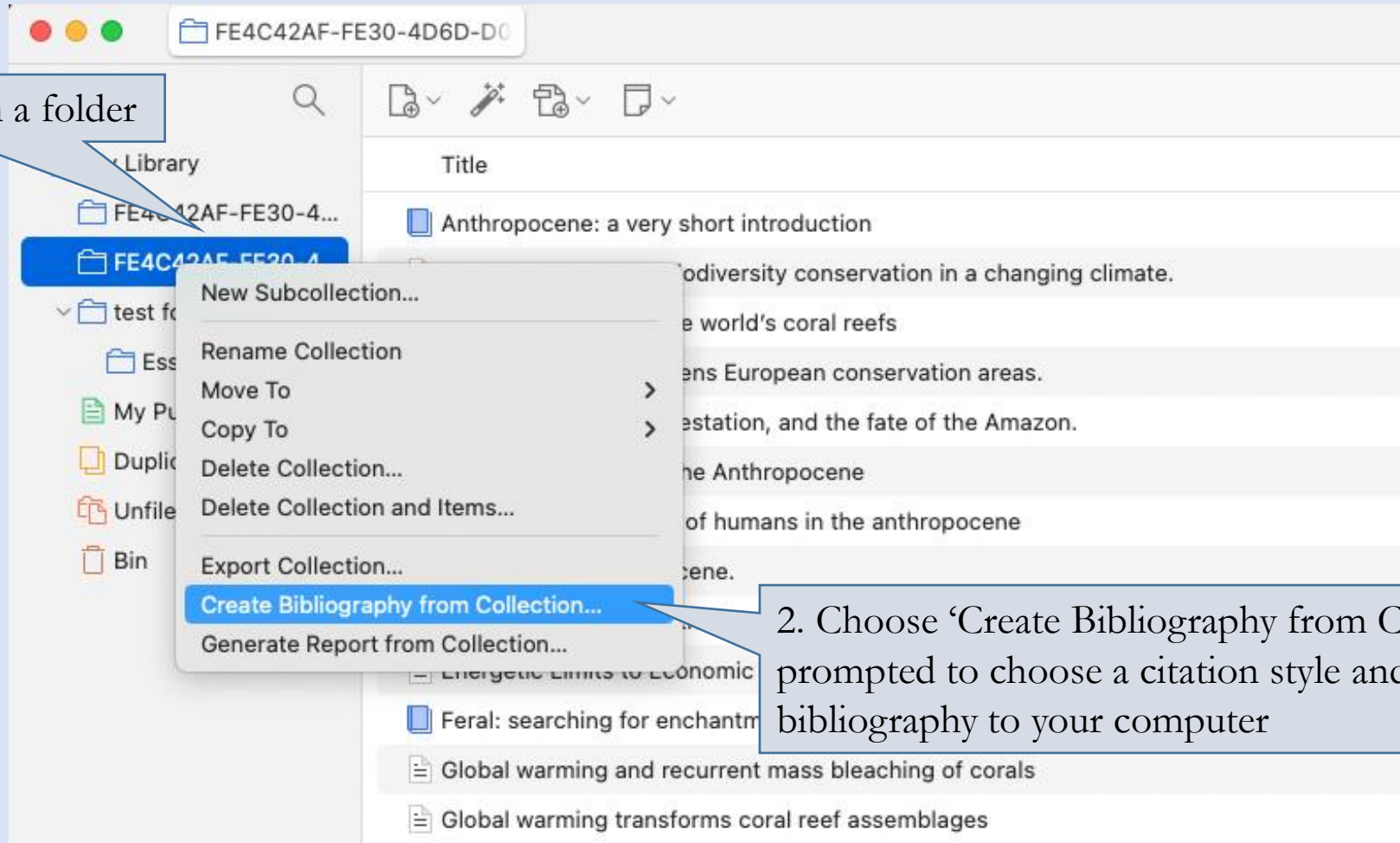
2. Choose 'Create Bibliography from Collection'. You will be prompted to choose a citation style and to save the bibliography to your computer

Getting more citation styles

- Download more citation styles from zotero.org/styles

- Right-click on a citation style of your choice and select **Save link** to download the style.

- Makes sure Zotero Standalone is running. Then double-click the downloaded file to install the new style.

Editing a style

- Web based style editor - http://editor.citationstyles.org/about/
- Not easy but can be done

Part 3: Other features

- Synchronising
- Zotero Groups

Your Zotero account

- Access and sync your library from anywhere (and from multiple computers)

- Create and join groups to share collections

- Access and share files in addition to references (but beware of copyright restrictions)
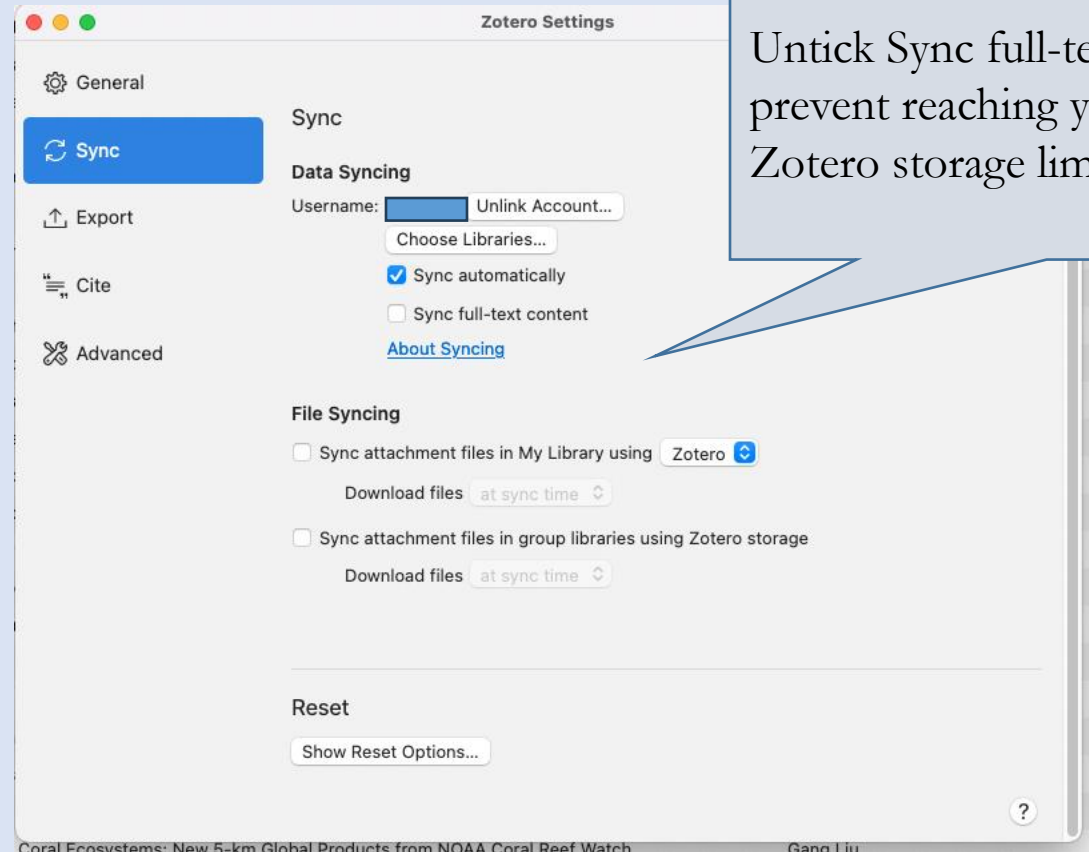
Syncing your library

- Connect Zotero to your account by following the steps under 1B on the handout

- Synchronise your account by clicking the sync icon
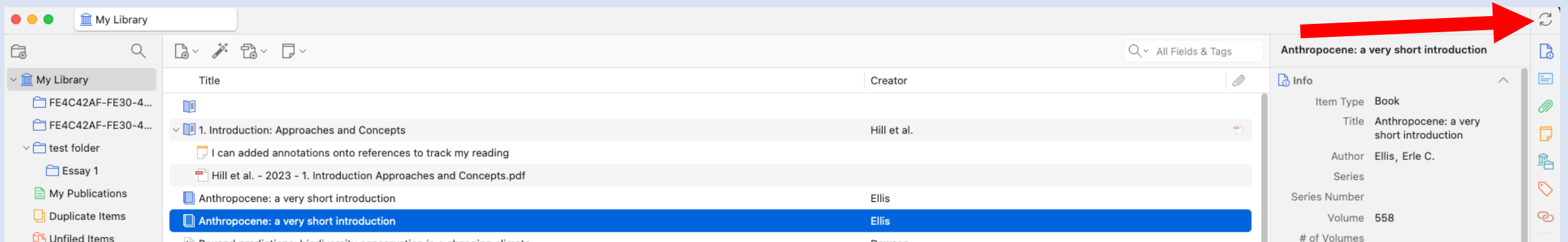
How to stop PDF files syncing to your online account

From the Zotero homepage click on Edit – Preferences – Sync

Untick Sync full-text content to help prevent reaching your free online Zotero storage limits.

Sharing references with others

- Collaborators must have a Zotero account
- Set up groups and define access rights on the Zotero web site https://www.zotero.org/groups/
- Add and organise references for your groups in Zotero Standalone
- Don't forget to Sync after adding/editing references
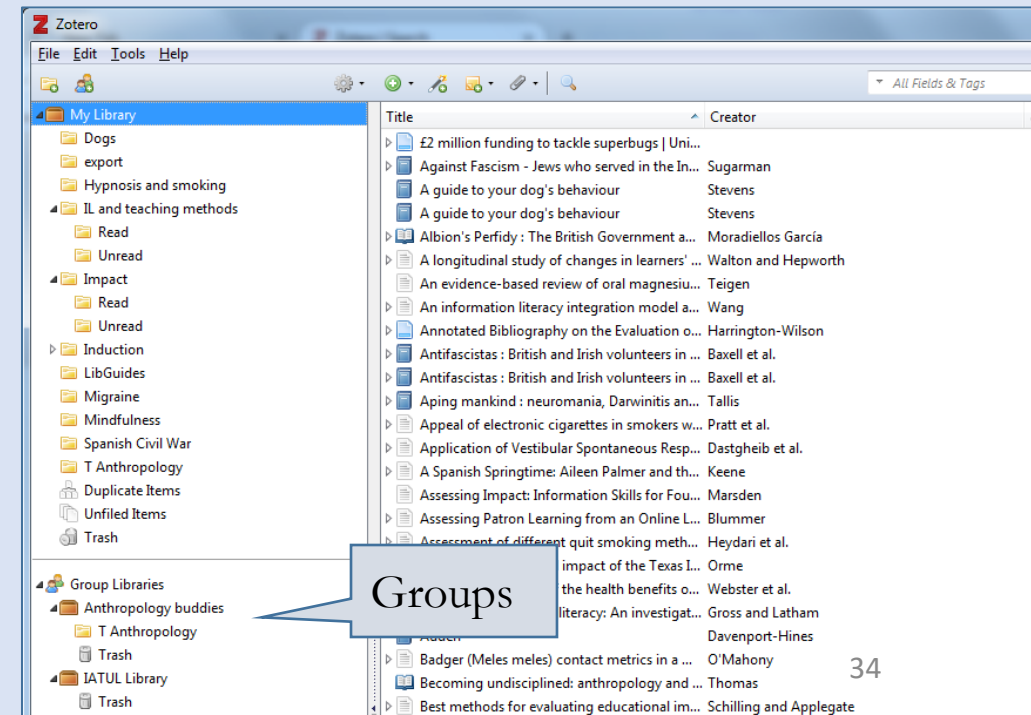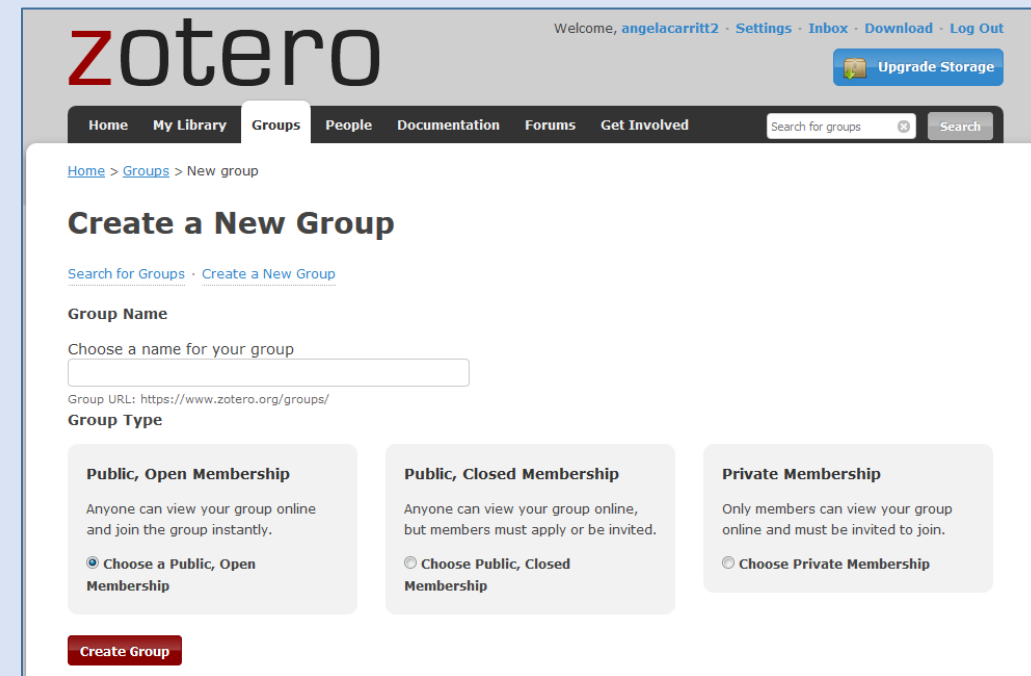
Backing up your references

- Back up your references regularly
- Save to external hard drive or cloud storage (OneDrive)
- Instructions: https://www.zotero.org/support/zotero_data

Getting Help

- zotero.org/support

- Local managing references guide:
    - http://libguides.bodleian.ox.ac.uk/reference-management

- Email the Bodleian Libraries reference management team: reference-management@bodleian.ox.ac.uk