Getting Started with Zotero

Zotero is reference management software that runs on MacOS, Windows, and Linux.

The software is installed on your computer but you can use Zotero cloud storage to synchronise your Zotero library across multiple computers and to access your references online. The first 300MB of Zotero cloud storage is free but if you exceed this you have to pay an annual subscription. You can easily keep within the free 300MB if you only use Zotero cloud storage for references/citations and do not upload PDFs (untick the two 'Sync attachment…' options under Edit > Settings > Sync (File Syncing).

Installation

To use Zotero you need to install the software on your computer. It is already installed on the computers at IT Services, However, if you are using your own computer please follow the instructions on the last page of this handout to install it.

Registering/Sign up (optional)

You will need to sign up a free Zotero account if you want to do any of the following:

- access your Zotero library from more than one computer
- access your Zotero library online
- share libraries of references with other people

To sign up for a free account…

➢ Open the Zotero homepage (http://www.zotero.org). Click on **Log In** (top right) then click on **Register for a free account**. Fill in the form and click on **Register.**

➢ You will be emailed a link to click on to complete registration, along with instructions on how to connect your Zotero installation to your new account.

➢ For more information on using your Zotero library on multiple computers, accessing Zotero online and backing up your Zotero library, see page 5.

Opening Zotero

Open Zotero from the Start menu on your computer or from the Zotero icon on your computer's desktop.

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Adding references from a database, e.g. Web of Science

Use this same procedure with many other online databases, catalogues and search engines. Web of Science is just an example of how this works.

➢ Make sure Zotero is open

➢ Open SOLO (http://solo.bodleian.ox.ac.uk) and search for **Web of Science Core Collection**. Under the entry for Web of Science Core Collection, click on **Online Access** followed by **Link to Database**.

➢ Search for a subject of your choice.

➢ Select one reference by clicking on its title.

➢ You should see the icon either in the URL bar or in the top-right of your browser. Click this and a pop-up window will appear saying the reference is being saved to your library. **Note** that the Zotero Connector icon (Save to Zotero) *changes* according to the type of web page you are viewing; it might be a folder (when there are multiple items on a page, such as a database or library catalogue), a book, a newspaper, a PDF, a text document, a webpage, etc. Also, you might need to 'pin' or 'show' the Connector extension in your browser's Extensions settings (click the jigsaw piece icon) to ensure that it is always visible.

➢ Look at your Zotero window. You should see the item you just added in the middle column.

➢ Return to Web of Science and click **Results for…** on the top left of the screen so that you can see your full list of search results.

➢ You should see an icon in the top right of your browser that looks like a folder . Click this and a pop-up window should appear with a list of the items in your search results. Select which items to add and click **OK.**

➢ Look in your Zotero window. You should see the item you just added in the middle column. When adding multiple references simultaneously using the folder icon in your web browser we recommend you check that they have all been imported.

Using collections to organise your references (a bit like folders)

➢ In Zotero, click on the **New Collection…** icon , just above **My Library** to create a new collection. Give it a name.

➢ Click on **My Library** to view your references again.

➢ Drag and drop a reference from the centre pane into your newly created collection.

Adding and editing a reference

➢ In Zotero, click on the **New Item** icon

➢ From the drop-down menu that appears, select an item type (e.g. book, journal article, etc.)

➢ In the right pane in Zotero, in the Info tab, you can add details, such as author, title, etc.

➢ Your new reference will appear in the centre pane in Zotero.

➢ To edit a reference, click on its title to see full details appear in the right column. Click in any field to edit its contents.

In-text citation (in Microsoft Word)

To use Zotero with MS Word, an add-in must be installed. However, this is done automatically when Zotero itself is installed. You will find a Zotero tab on the ribbon in MS Word on IT services PCs.

If you do not find it on your own computer:

➢ In Zotero, go to **Edit > Settings > Cite** (Word Processors section). You can then click on the appropriate button to install the add-in for Word or LibreOffice.

Once the add-in is installed:

➢ Launch MS Word and create a new document.

➢ Type some text and put your cursor where you want to insert a citation.

➢ Click on the **Zotero** tab and then click on **Add/Edit Citation**.

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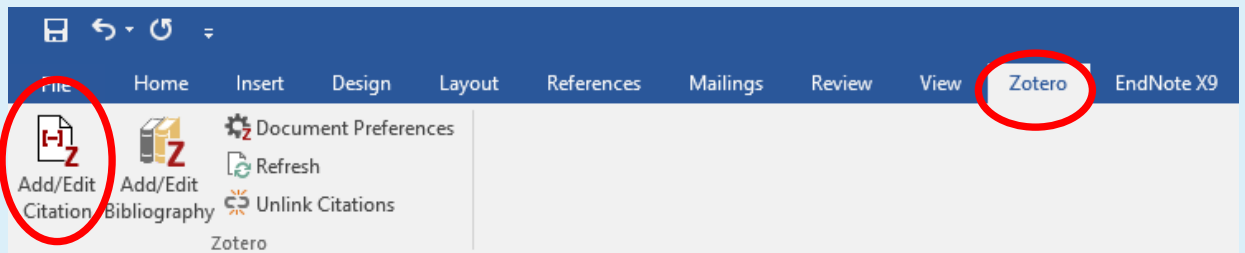
➢ Zotero should ask you to select a citation style; choose one and click **OK** (you can easily change style at any time – even when the document is finished – by clicking on the **Document Preferences** button on the Zotero tab in Word).

➢ A pop-up 'Search dialog' box appears. If you know the title or author of the reference you want to insert, start typing, and select the appropriate item when it appears. Then press **Enter**.

➢ If you want to add a page number, prefix or suffix to a citation, click on it within the Zotero bar. This will open a dialogue box in which you can add page numbers, prefixes and suffixes.

Click on the citation to add page numbers etc
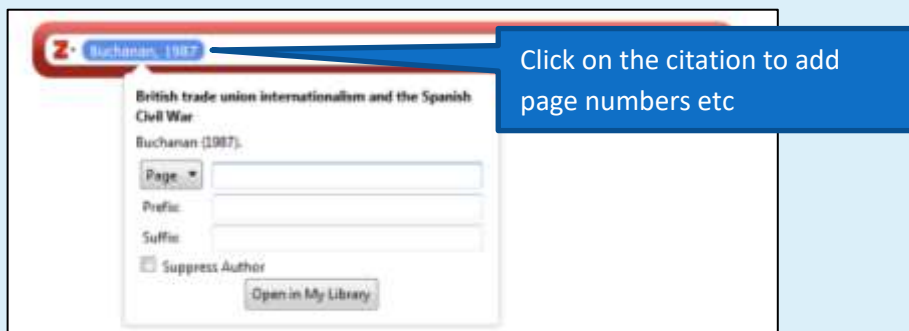
➢ If you can't remember which citation you want to add, click **Add/Edit Citation** and then click on the drop-down menu in the Zotero bar and select **Classic View.** Select the reference you want to insert from the list and click **OK.**
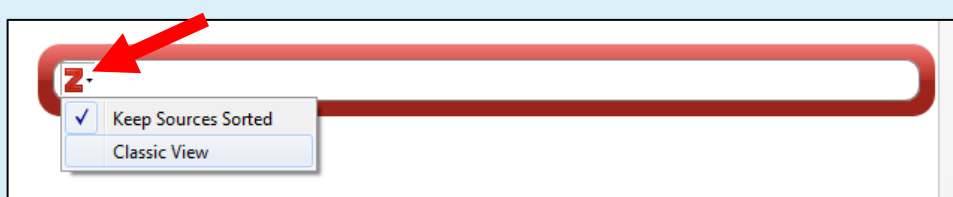
Create a Bibliography (in MS Word)

➢ Add a couple more references to your document.

➢ Put your cursor where you want to insert the bibliography.

➢ Click on the **Zotero tab**, and click on **Add/Edit Bibliography.**

Create a Bibliography (from Zotero)

➢ Right click on the collection (folder) you created in Zotero.

➢ Select **Create Bibliography From Collection…**

➢ Select your citation style, output mode and method, and click on **OK**.

Other Zotero Features

Create a webpage 'snapshot'

➢ Browse to a webpage

➢ Click on the Zotero Connector ('Save to Zotero') icon in the top right of your browser

➢ Zotero creates a citation referring to the webpage along with a snapshot of the page that can be accessed offline. Click on the disclosure triangle next to the reference to expand its contents. Double clicking on the webpage item listed below will open the snapshot attachment in your browser. This is a record of the webpage as it was when you took the snapshot – ideal if you are citing a page that may change in the future.

Create a group folder to share references with others

Note: You need to have a Zotero account to use this feature.

➢ Go to https://www.zotero.org/groups/

➢ Click **Log In** (top-right) and enter your Zotero username and password (if you haven't registered for a Zotero username and password see **Registering/Sign** up on page 1). Click on **Login to Zotero**.

➢ Click on **Groups** at the top and then **Create a New Group**.

> ➢ Type a name for your new group.

> ➢ Select the type of access you would like to give your group (e.g. Public Open, Public Closed or Private).

> ➢ Click on **Create Group**.

> ➢ Click on **Save Settings**.

> ➢ Click on **Members Settings** to invite someone to your group. Click on **Send More Invitations**, provide email addresses and then click on **Invite Members**. *Note: Members will also need to create Zotero accounts.*

> ➢ Click on **Groups** to see your newly created group.

> ➢ Launch the Zotero app. You should see the Group Libraries and your newly created group folder appear at the bottom of the left column. It may take a few minutes. If it does not appear click on the sync icon, which looks like a round green arrow in the top right corner ⟳ . Note: This will only work if you have set up your Zotero installation to sync with your Zotero account. See **Syncing your Zotero library** on page 8.

> ➢ Drag a reference from the centre pane into your newly created group folder to place a copy in the folder, and then force another sync by clicking on the sync icon ⟳

> ➢ That reference should now be shown on the Zotero website under your new group, if you click on Group Library.

Drag and drop references

> ➢ Create a new email, Google doc, or MS Word document and set your cursor where you would like to insert a reference.

> ➢ From Zotero, select and drag a reference from the centre pane into your email, Google doc, or MS Word document.

> ➢ The full citation should now appear in the document.

Add a reference from an identifier

> ➢ In Zotero, click on the **icon** at the top of the window that looks like a magic wand 🪄 .

- ➢ Type in an ISBN, DOI, or PMID (PubMed ID). Eg, type in **9780205172870** (an ISBN).

- ➢ You should see your added reference appear in the centre pane.

Add a reference from a PDF

- ➢ Download a PDF version of an article you found when searching *Web of Science*.

- ➢ Drag the PDF on to the centre pane in Zotero.

- ➢ Zotero should automatically download a reference based on the PDF's metadata.

- ➢ Zotero will retrieve the bibliographic information for the PDF and add it to your library as a new reference, with the PDF attached.

- ➢ You can drag-and-drop multiple PDFs. This is the fastest way to add references to your Zotero library for papers you have already downloaded.

Importing references from text files (.ris, .bib, etc.)

- ➢ Databases allow you to export references in a text format that can be imported into your Zotero library. This is an alternative to the Connector button and is more suitable for large numbers of references. In *Web of Science*, tick the tick-box at the top of your search results, click the **Export** button to the right, then select **RIS (other reference software)**. You can then specify exactly how many 'records' (references) you wish to export, and choose whether to export the full record or not (we recommend always choosing full record for Zotero). Click **Export**. The bowser should indicate a new file in the Downloads folder.

- ➢ In Zotero, click **File**, followed by **Import….** Make sure **A file…** is selected, then click **Next**….

- ➢ In the file browser window that appears, locate and select the file to import, then click **Open**. In the Options you can choose whether to add the items to a new collection or not. If you choose not to, they will be added to whichever collection you have highlighted in the Zotero app. Alternatively, if you have **My Library** selected, they will be added to that and visible in the **Unfiled Items** view further down the list in the left pane. Under **File Handling**, keep the default setting (**Copy files…**). Click **Next** to import the references.

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Syncing your Zotero Library between computers

Syncing your Zotero library

If you sign up for a Zotero account you will be able to access your Zotero library from any computer/device, and view your Zotero library online. As well as access in a browser there is a Zotero app for iOS (Apple iPhone/iPad – find this on the App Store on your device). An Android app is also now available in beta from the Google Play app store.

1. Go to www.zotero.org
2. Click **Register** (top-right) and fill in the form. You will be emailed a link to complete registration
3. Now link Zotero on your computer to your Zotero account. To do this open Zotero, click **Edit**, followed by **Preferences** and then **Sync**.
4. Fill-in your Zotero username and password
5. If you want to use Zotero on more computers, simply follow the installation steps on each computer. Once installed, launch Zotero and click **Edit > Preferences > Sync** and fill in your Zotero username and password. Your Zotero Library will then synchronize across the computers.

Installing and setting up Zotero

To use Zotero effectively you need to install three components:

1. Zotero desktop app
2. The Zotero Connector extension for your browser, which makes it easy to add items to Zotero. The Connector is available for Chrome, Edge, Firefox and Safari.
3. An add-in for your Word processor (i.e. for MS Word, Open Office or Libre Office). For Google Docs you will only need the Zotero Connector to make citations and bibliographies from you Zotero library.

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To install:

1. Go to www.zotero.org and click **Download**.

2. For Zotero 7 for Windows click **Download**. If you are a Mac or Linux user you should be offered the appropriate version. If not, select the relevant option under **Other versions**. Download and run the installation file.

3. Next install the browser plug in. Go back to https://www.zotero.org/download/. If you are using Chrome the button will say **Install Chrome Connector**. If you are using another browser it should identify that and offer you the right version. If not, click **Zotero Connectors for other browsers**.

4. Finally, install the **add-in for Word or LibreOffice/OpenOffice**.

   Open **Zotero** and go to **Edit > Settings**. In the **Cite** pane, scroll down to **Word Processors** and choose the option for Microsoft Word or LibreOffice.

Useful Links

Zotero quick start guide – http://www.zotero.org/support/quick_start_guide

Zotero video tutorials – http://www.zotero.org/support/screencast_tutorials

For further help in using Zotero, contact your subject librarian –

https://www.bodleian.ox.ac.uk/ask/subject-librarians