ZOTERO FOR REFERENCING

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SESSION OUTLINE

- Part 1 – Collecting and editing references
- Part 2 - Creating bibliographies
- Part 3 – Collaborating & other features
- Part 4 – Practical exercise

ZOTERO PROS AND CONS

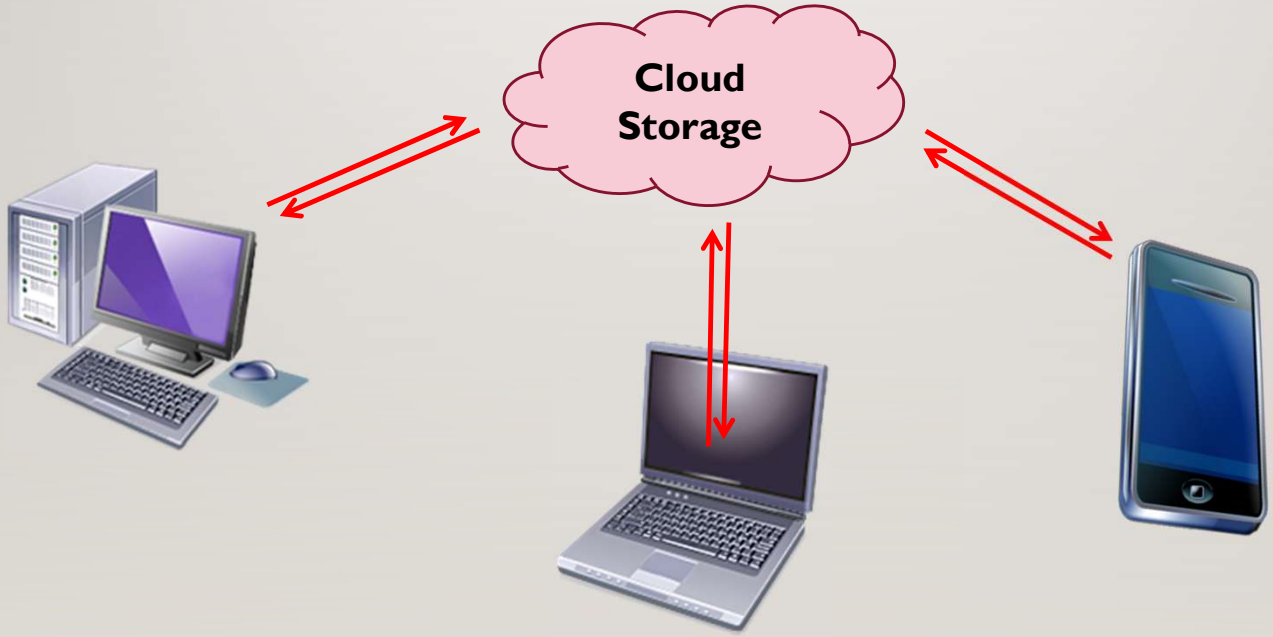
PROS

- 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

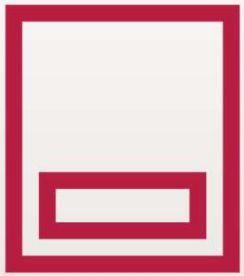
- Does not work with Pages
- Subscription fees required if you need to store more than 300MB of data

ZOTERO CLOUD STORAGE

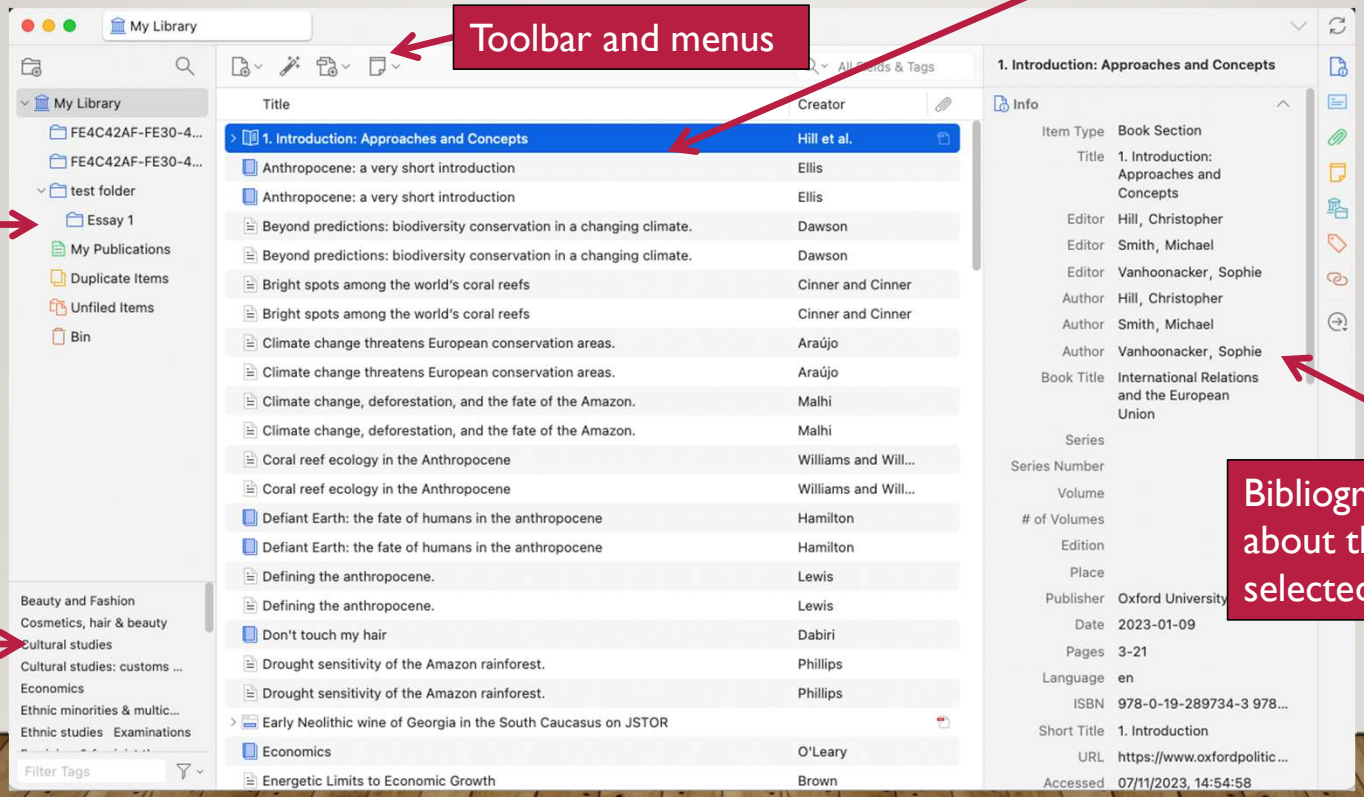


PART 1: COLLECTING AND EDITING REFERENCES

- Tour of the Zotero application interface
- Adding references into Zotero
- Editing imported references
- Editing and organising references



A QUICK TOUR OF ZOTERO



Toolbar and menus

List of documents in selected folder or library

Navigate collections and groups

Filter by tags

Bibliographic information about the currently selected document

OPTIONS FOR ADDING REFERENCES TO ZOTERO

Data capture (databases, catalogues, web pages)

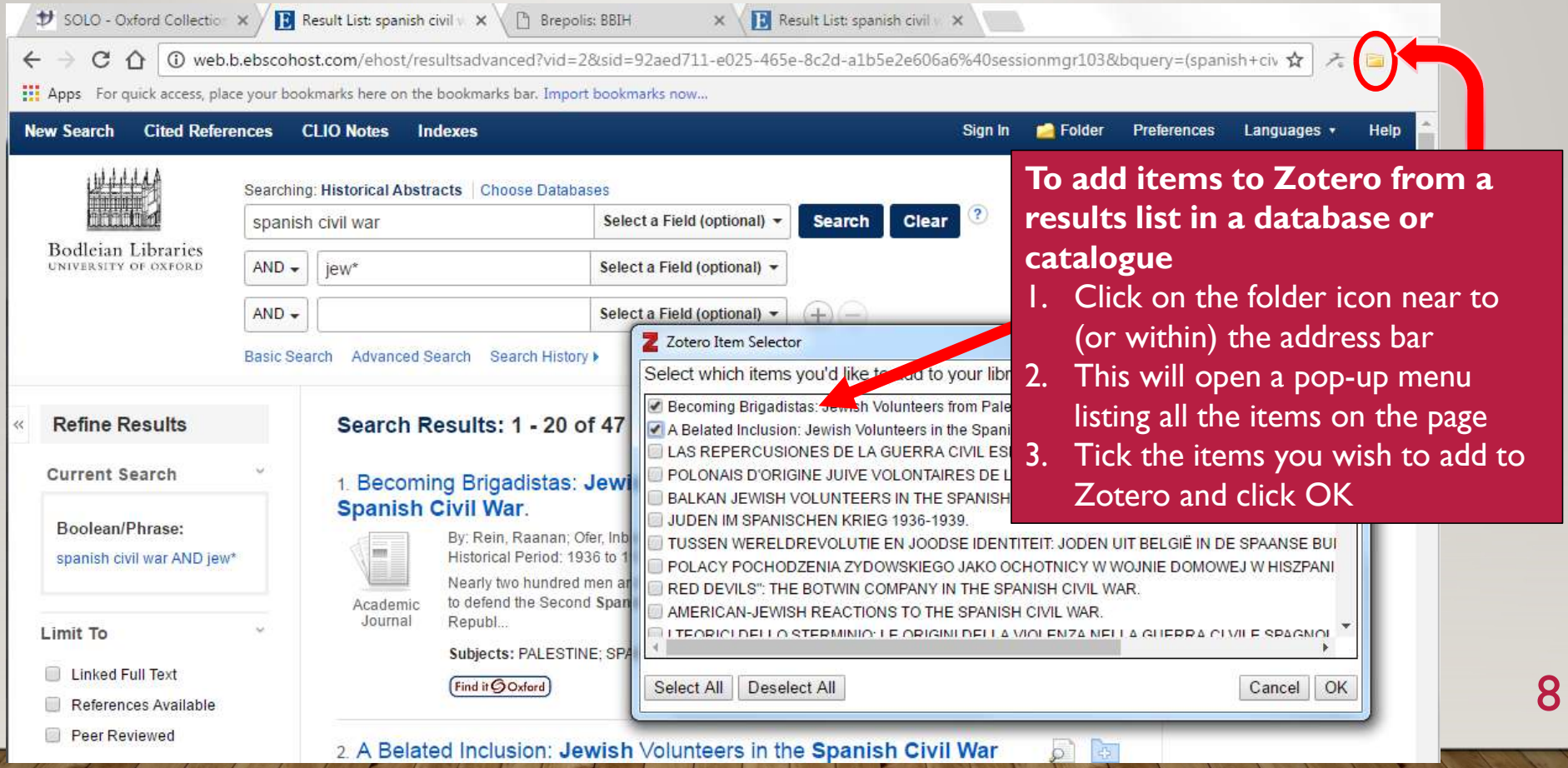
Add PDF files (Zotero will find matching bibliographic details for articles downloaded from databases)

Standard identifier (ISBN, DOI, etc.)

Manual entry

Import text files (.RIS/.BIB)

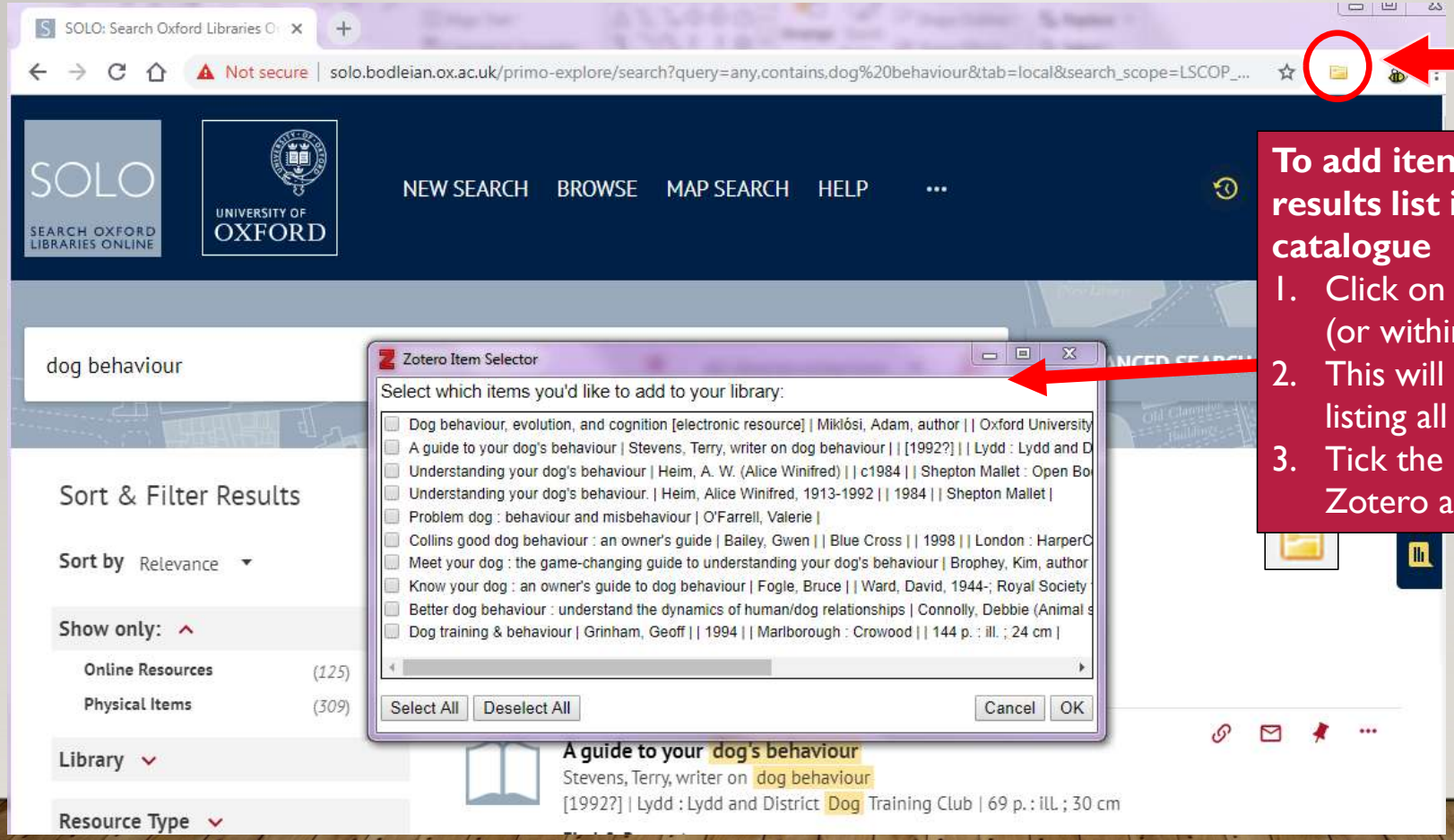
WEB CAPTURE FROM DATABASES/CATALOGUES



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

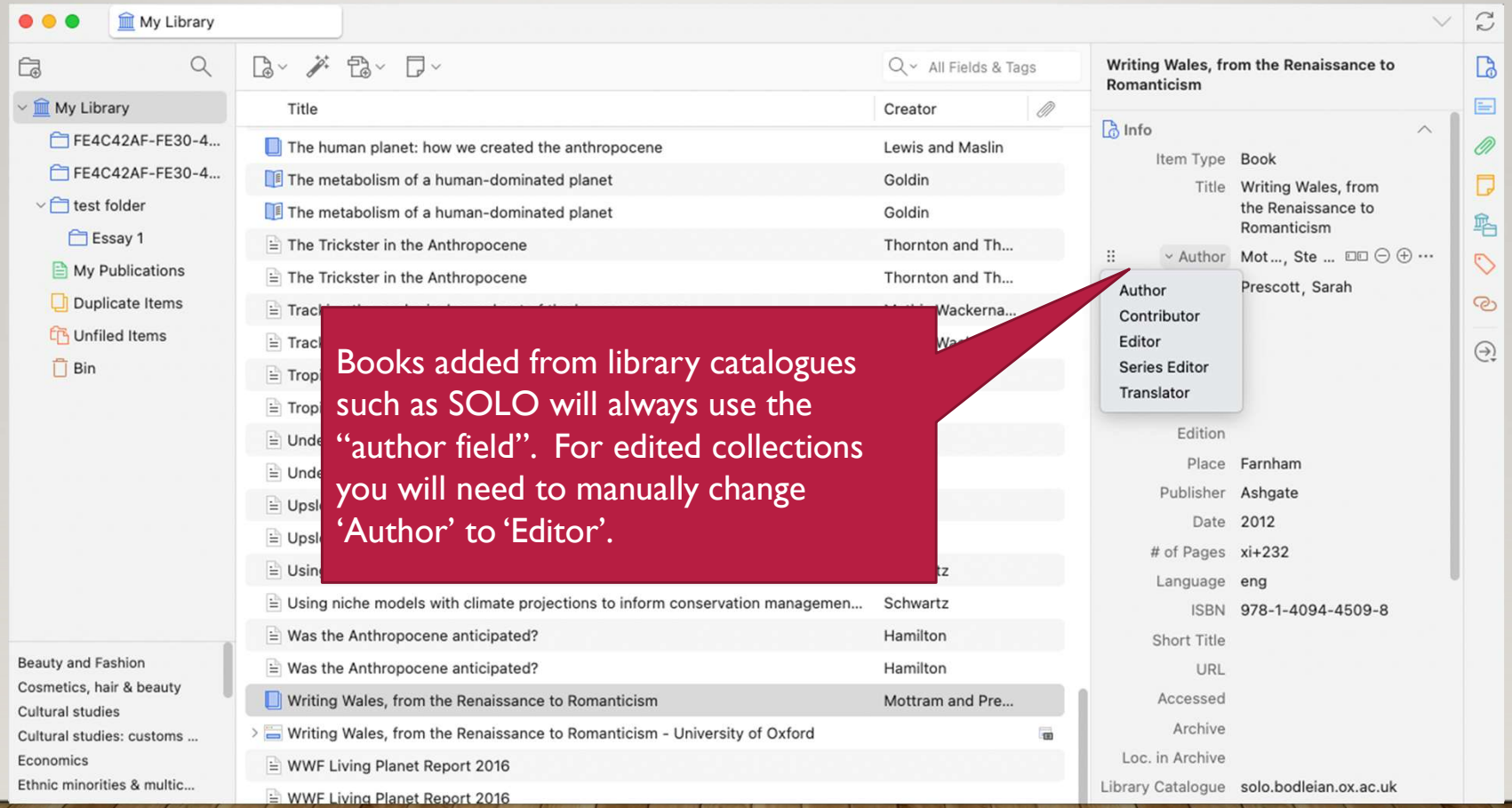
WEB CAPTURE FROM DATABASES/CATALOGUES



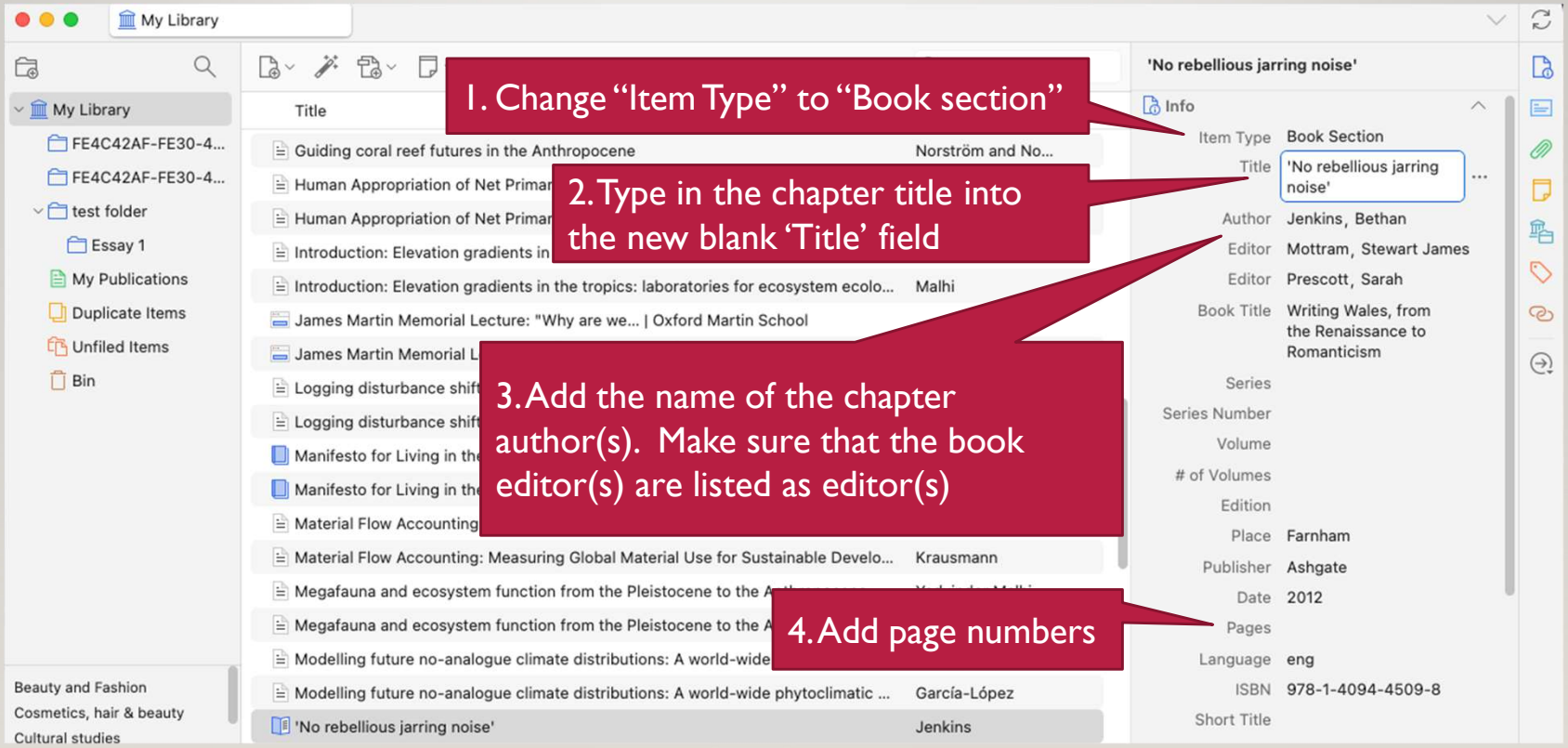
To add items to Zotero from a results list in a database or catalogue

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

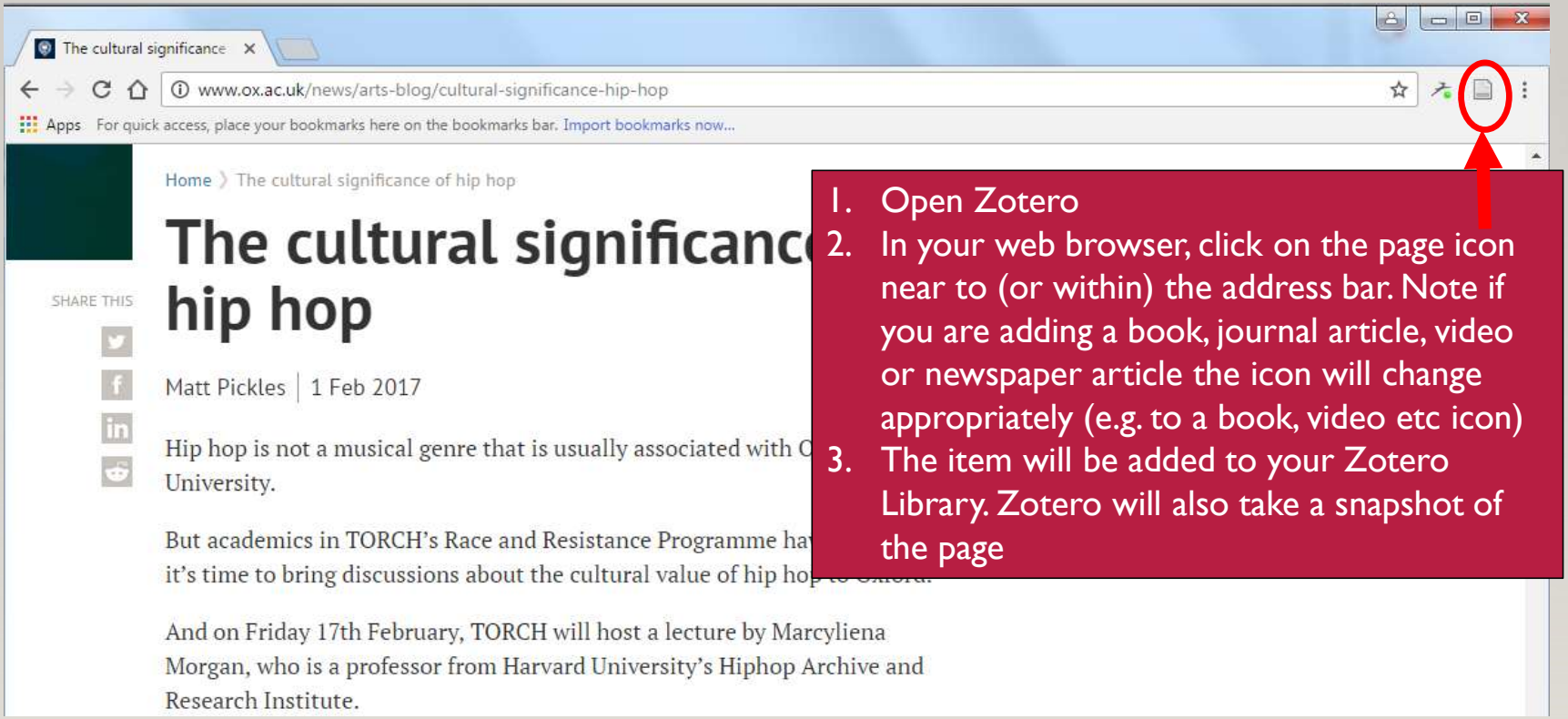
SOLO – AMENDMENTS TO EDITED COLLECTIONS



SOLO – AMENDMENTS TO BOOK CHAPTERS

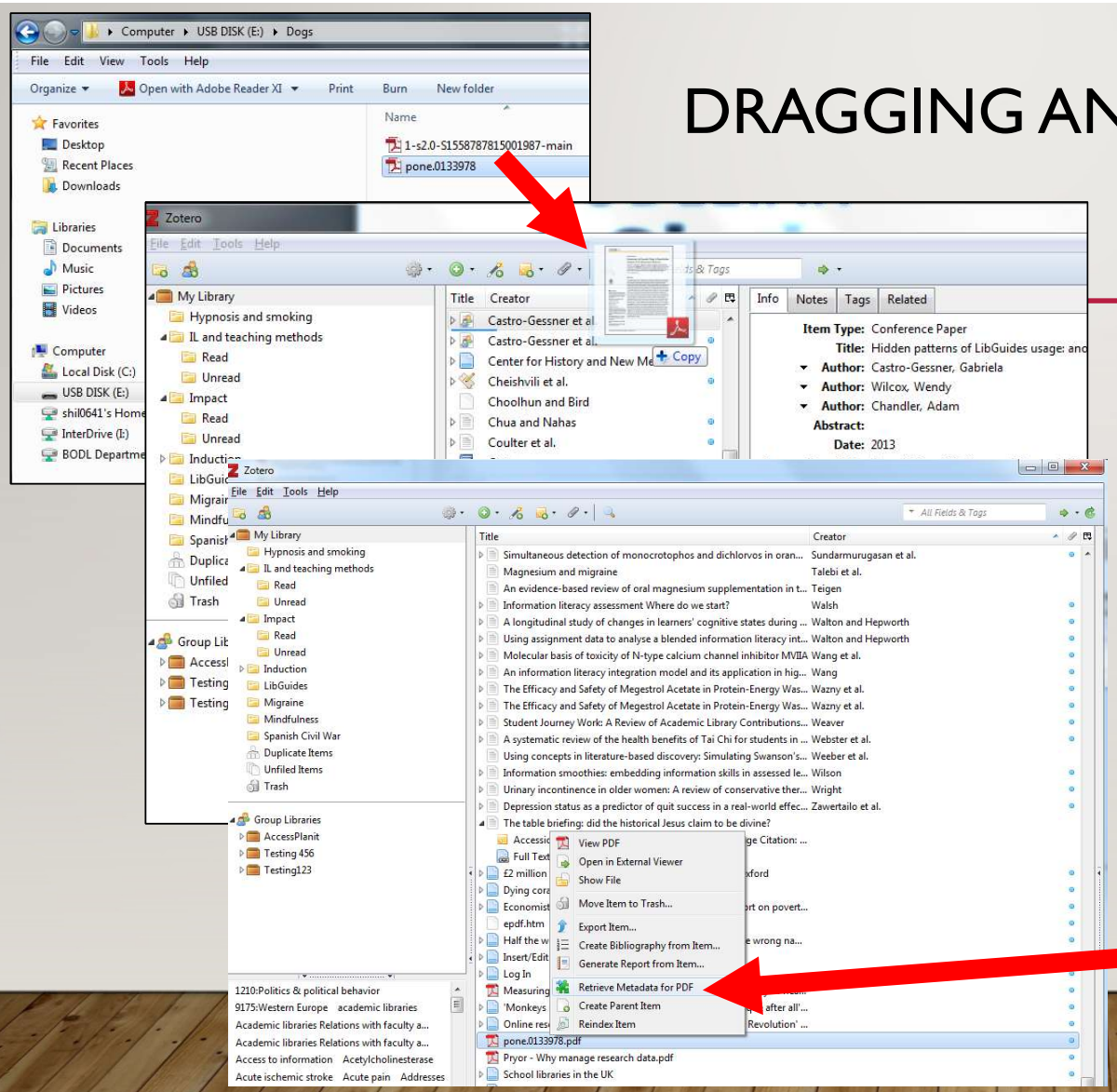


WEB CAPTURE: WEB PAGES



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

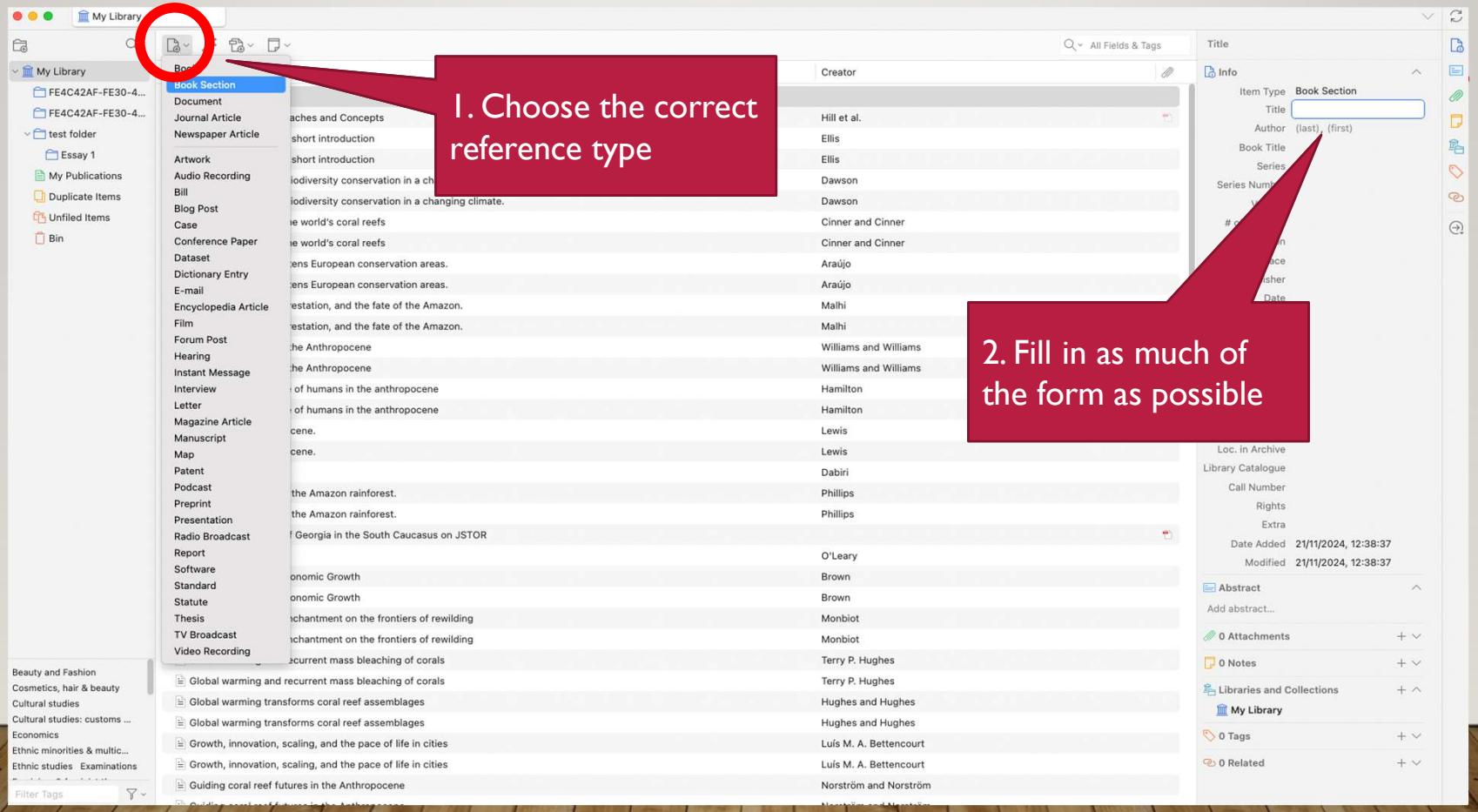
DRAGGING AND DROPPING PDF FILES



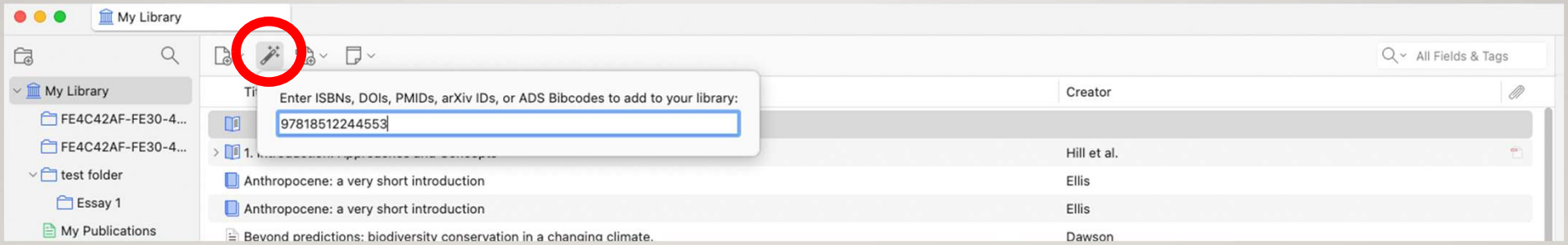
You can add references to Zotero by dragging and dropping PDFs into your Library. Zotero will "find" matching bibliographic details for pdf journal articles downloaded from databases. It will not find details for other PDFs (e.g. book chapters, reports and documents or photocopied/scanned items).

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



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
   - Click File / Import
   - Browse to find the RIS/BIB/TXT file that you saved to your computer.

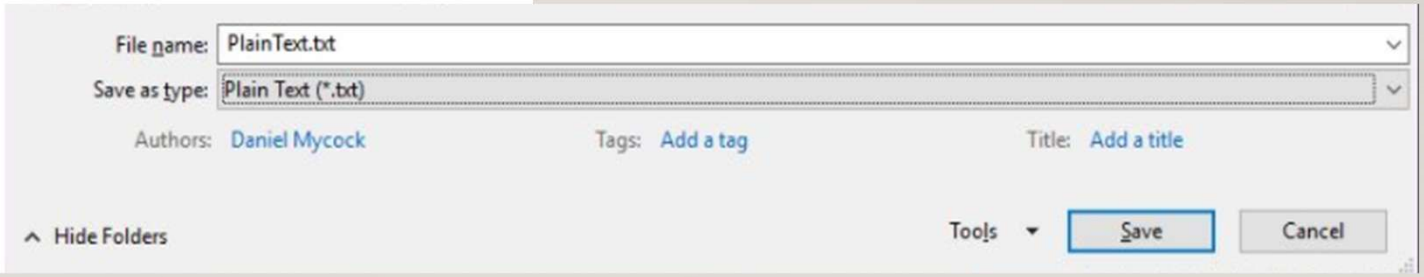
WHAT ARE RIS AND BIB FILES?

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

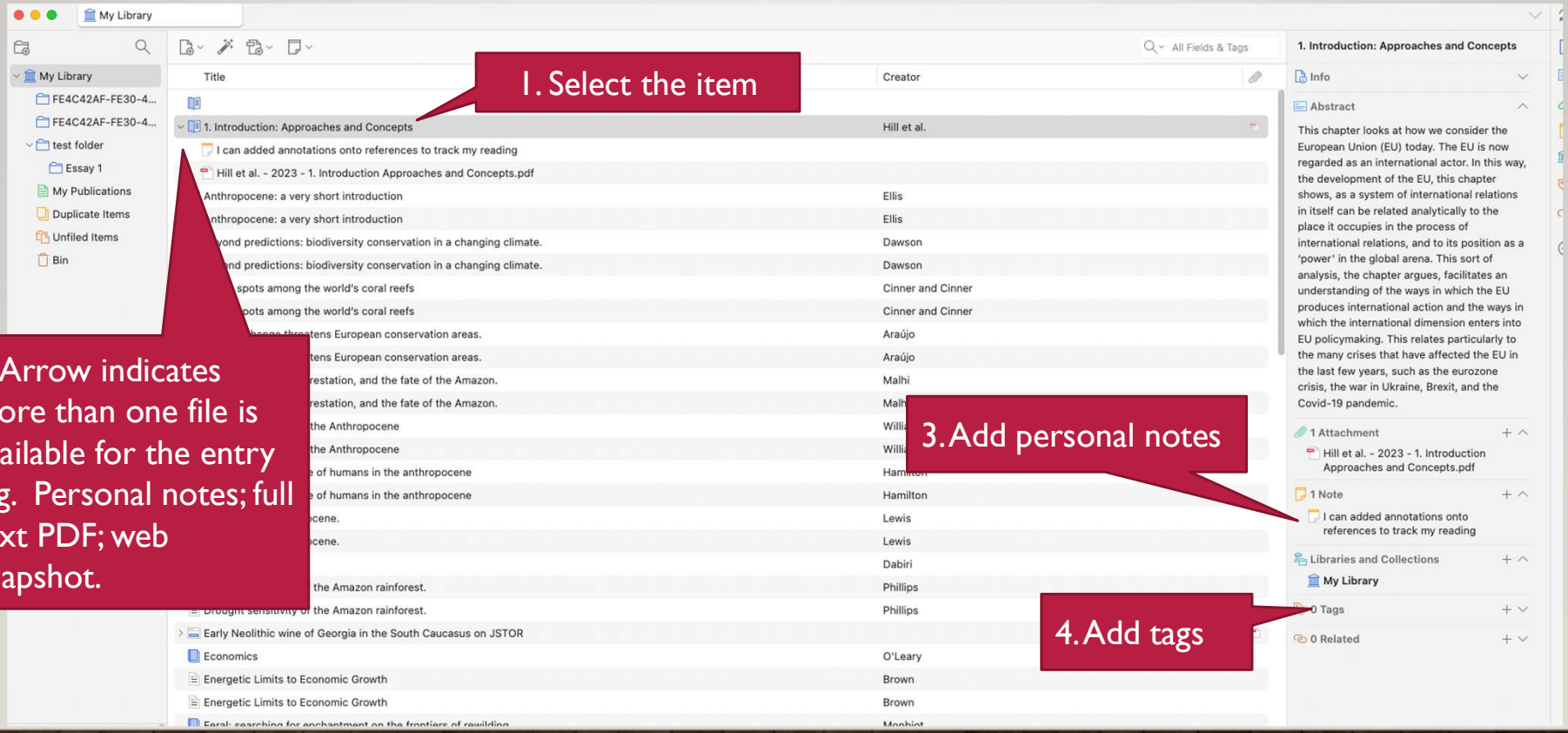
```
TY  - RPRT
A1  - Esparza,J.
T1  - Report of a WHO workshop on the measurement and significance of neutralizing antibody to HIV and SIV,
London, 3-5 October 1988
Y1  - 1990
VL  - 4
SP  - 269
EP  - 275
RP  - Not In File
CY  - San Francisco CA
PB  - UC Berkeley
KW  - HIV
KW  - SIV
KW  - AIDS
T3  - World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



EDITING REFERENCES

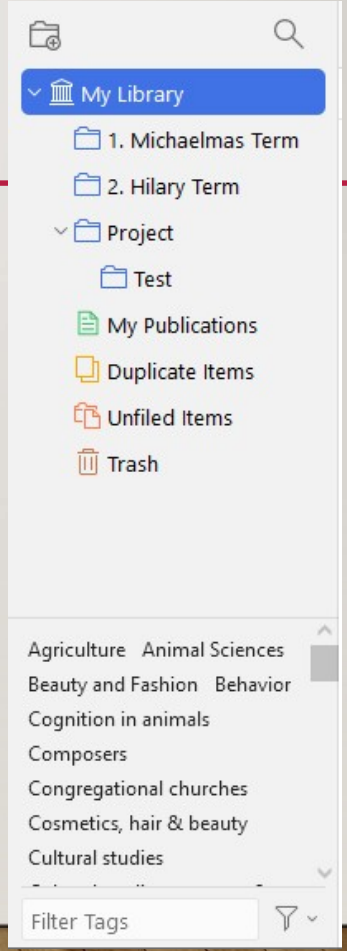


ORGANISING REFERENCES

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

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

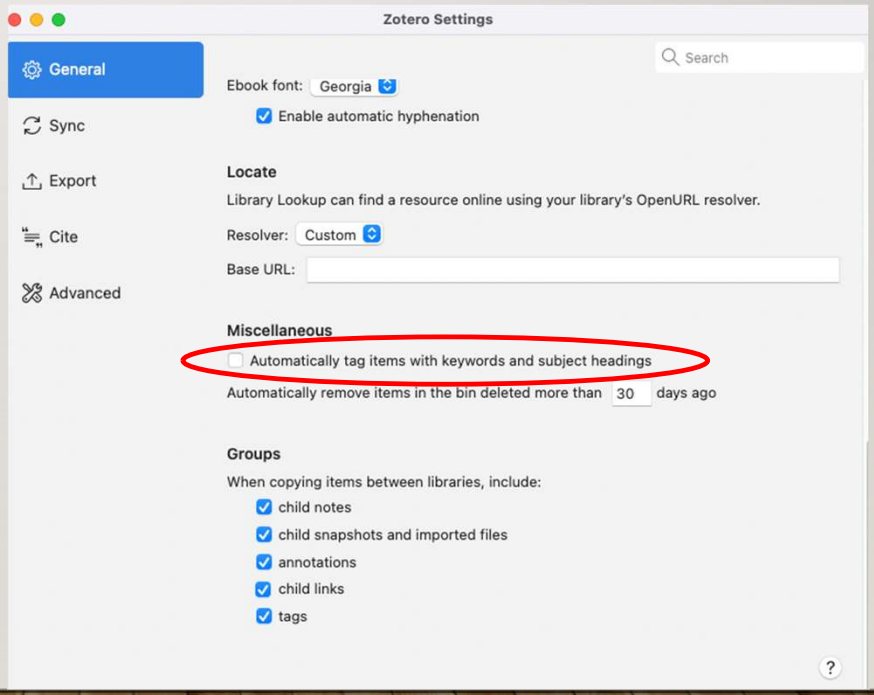
Tags allow you to form ad-hoc collections *after* adding items to your library



SWITCHING OFF AUTOMATIC TAG IMPORT

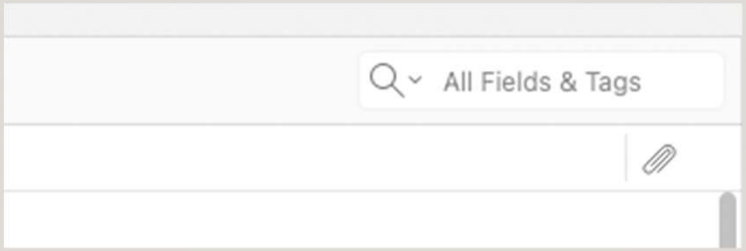
By default, Zotero imports tags from Library catalogues and databases

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

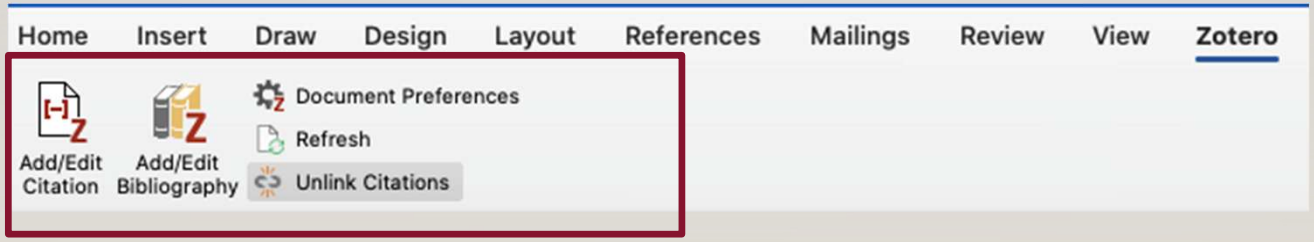


PART 2: CREATING BIBLIOGRAPHIES

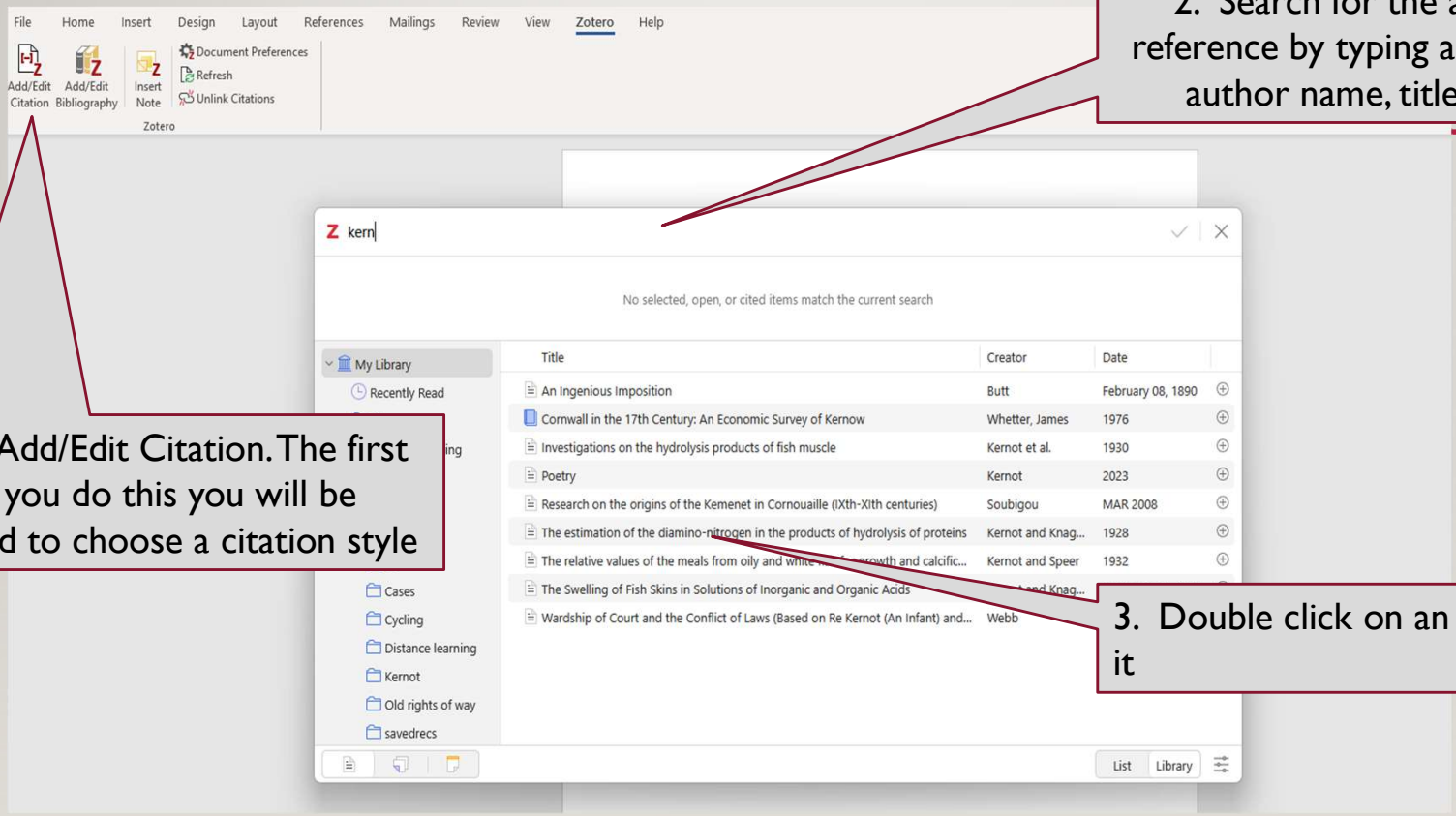
- Adding in-text citations & footnotes
- Inserting bibliographies and changing citation styles

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



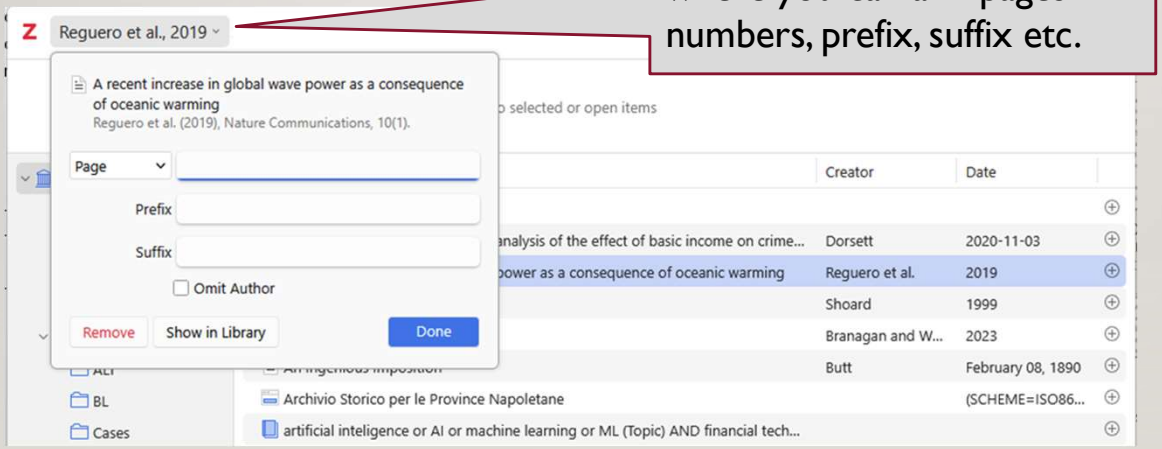
1. Click Add/Edit Citation. The first time you do this you will be prompted to choose a citation style

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

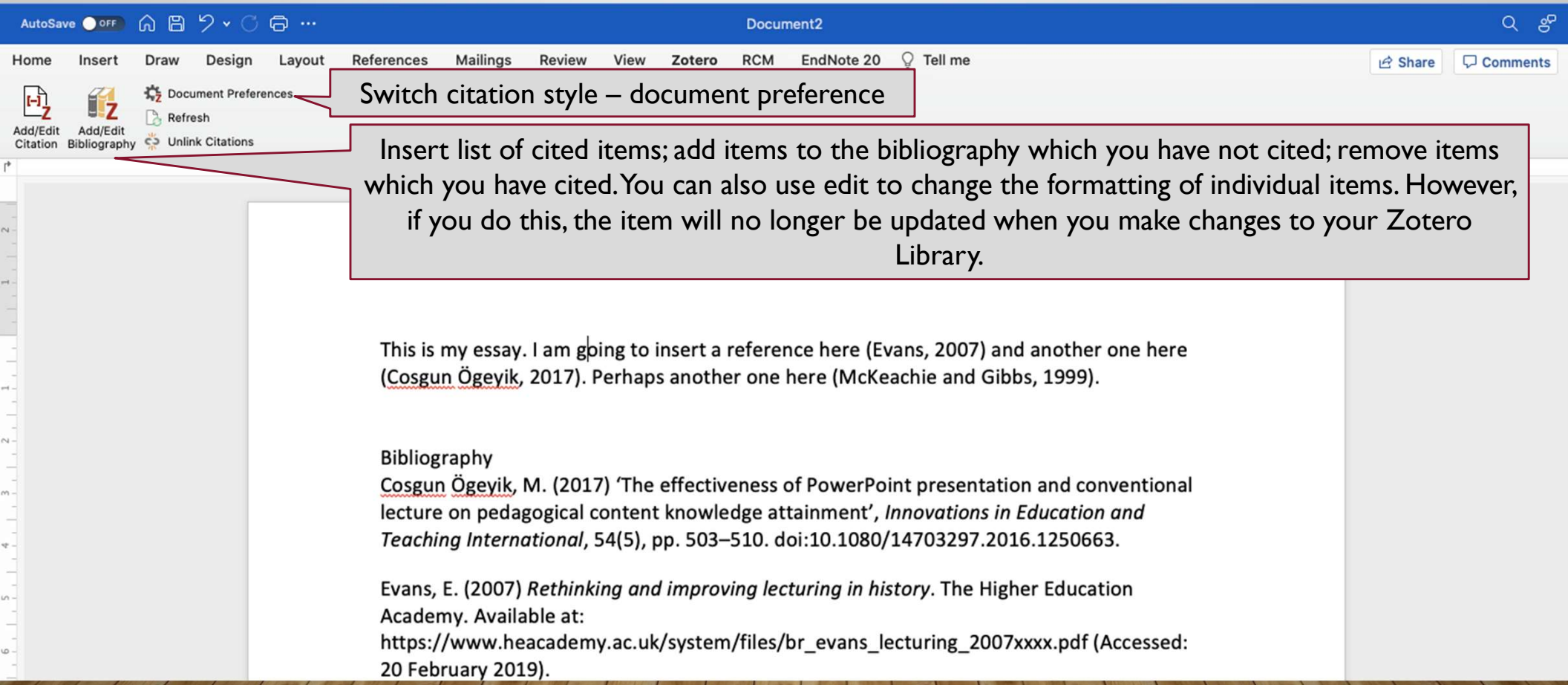
3. Double click on an item to select it

ADDING PAGE NUMBERS ETC. TO CITATIONS

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

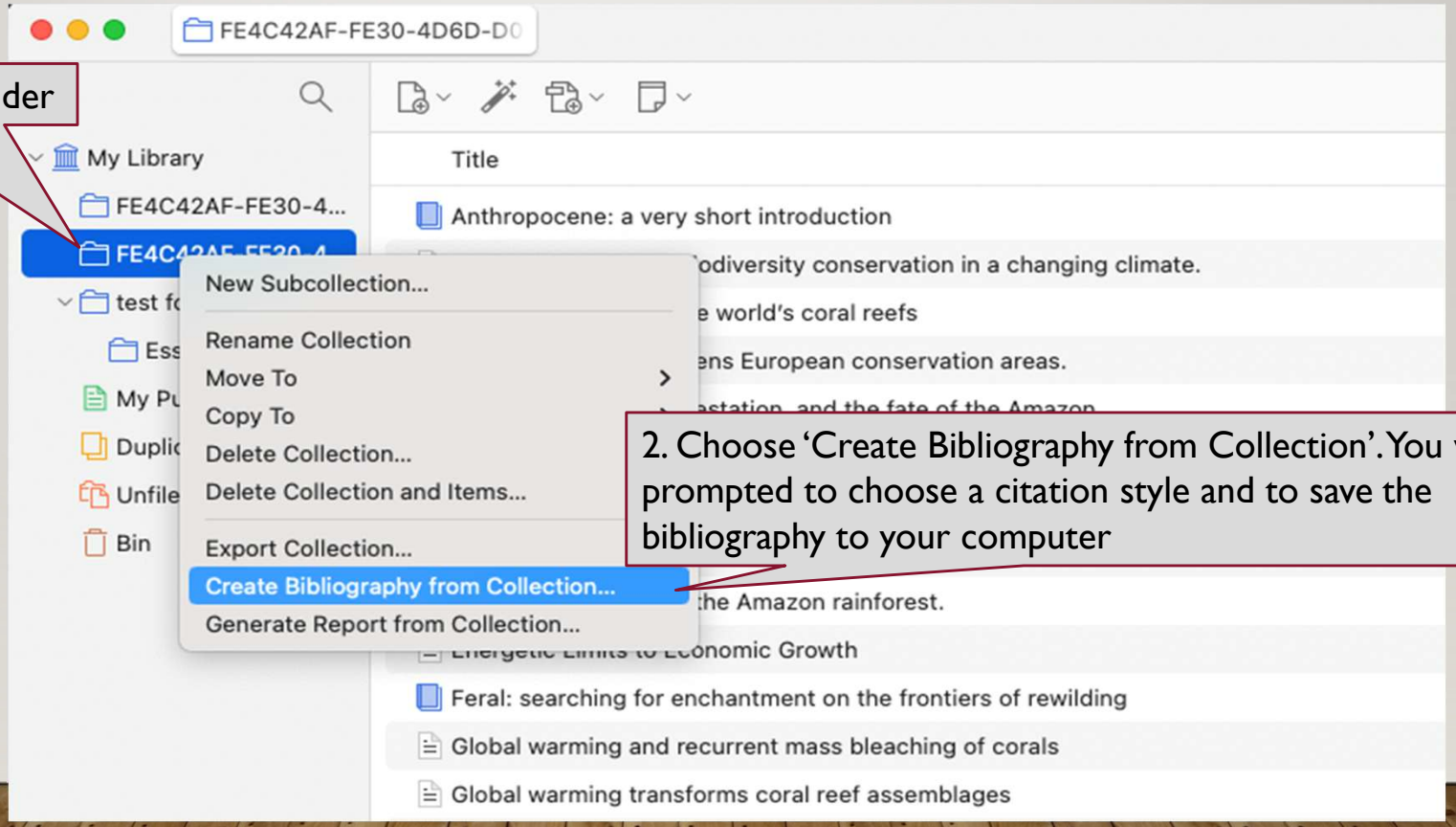


ADDING A BIBLIOGRAPHY IN WORD



CREATING A BIBLIOGRAPHY IN ZOTERO

1. RIGHT click on a folder



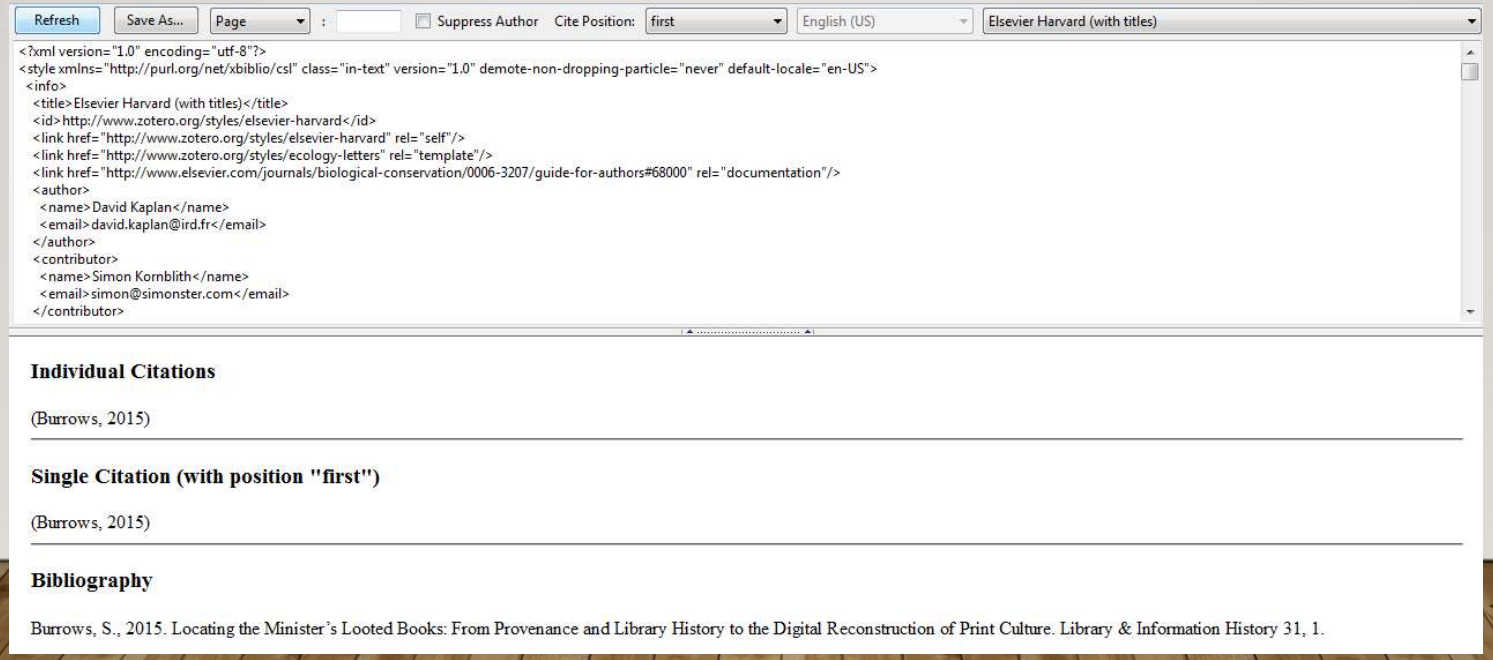
2. Choose 'Create Bibliography from Collection'. You will be prompted to choose a citation style and to save the bibliography to your computer

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: COLLABORATING & OTHER FEATURES

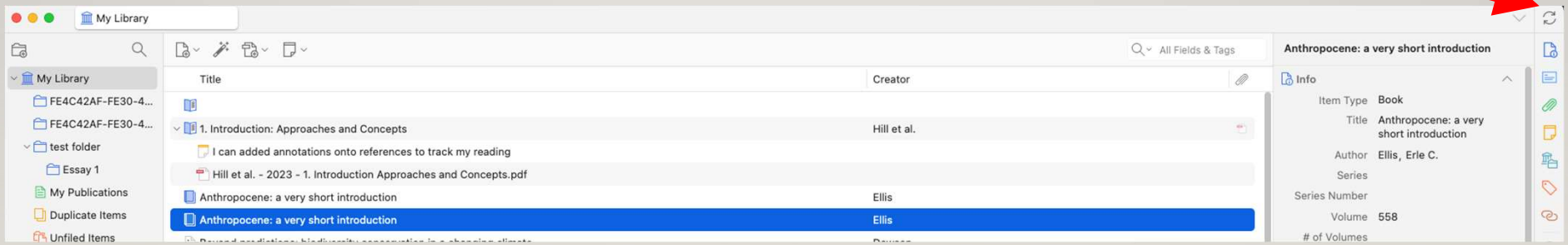
- Synchronising
- Zotero Groups

YOUR ZOTERO ACCOUNT

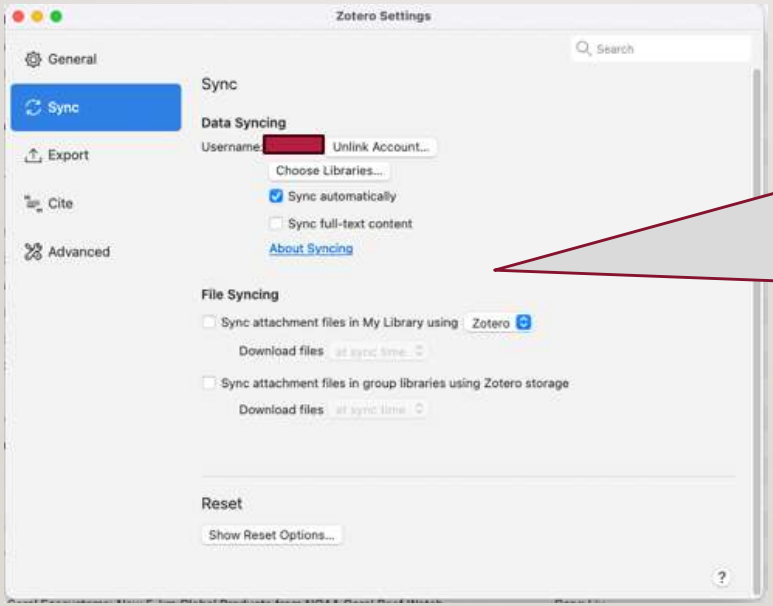
- Access and sync your library from anywhere (and from multiple computers)
- Create and join groups to share collections
- Access and share files in addition to references (but beware of copyright restrictions)

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



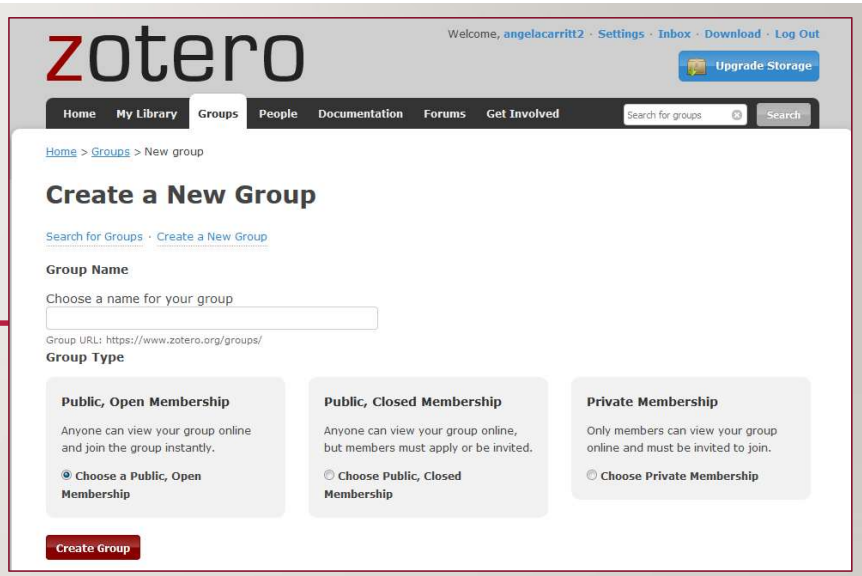
From the Zotero homepage click on Edit – Preferences – Sync

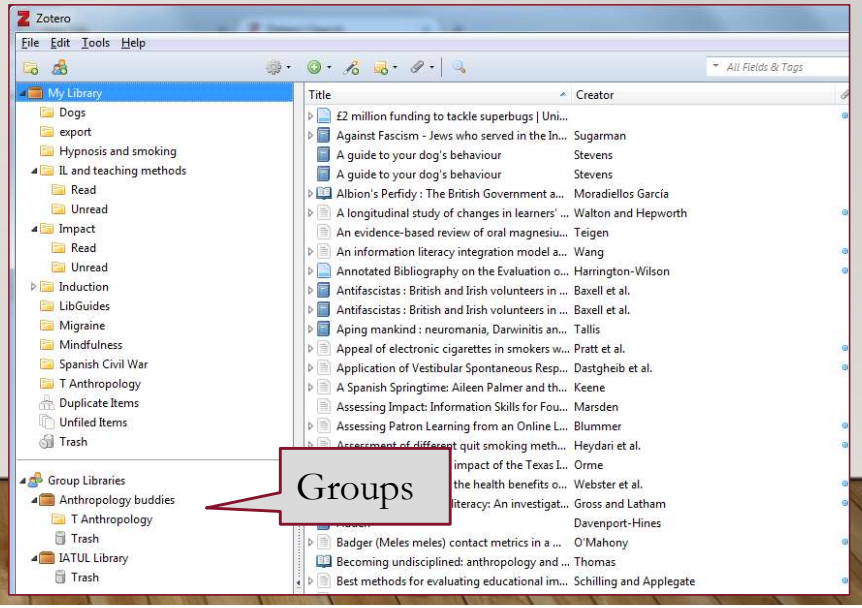
Untick Sync full-text content to help prevent reaching your free online Zotero storage limits.

Untick both the options under 'File Syncing' too

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





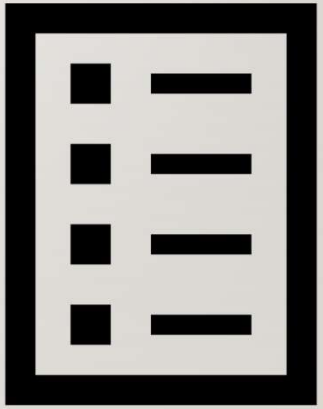
BACKING UP YOUR REFERENCES

- 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

PART 4: PRACTICAL EXERCISE

Now we will work through the practical exercises:

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