

Getting started with Zotero for PC

Downloading Zotero on your Windows PC

- Go to [Zotero | Downloads](#) and make sure to also install the Zotero Connector browser extension.

Setting up Zotero

1. Open Zotero from the **Start** menu or the search box (bottom-left of screen).
2. Before we look at adding references we will check that the Zotero Add-in for your word processor is installed and register for an online account.
3. In MS Word, look for a Zotero tab in the ribbon (the strip of menus at the top of the window). If it's not there, from the menu bar in Zotero go to **Edit > Preferences**. Choose the **Cite** pane and then the **Word Processors** tab. Run the install process for MS Word or LibreOffice, as appropriate. We will see later how to use this add-in to add citations and a bibliography as you write.
4. To register for a Zotero account, in your browser, go to <https://www.zotero.org/user/register> and complete and submit the form. You will receive an email with a link to complete the registration.
5. Once this is done you can link your installed app with your online account by going to **Edit > Preferences > Sync** pane > **Settings** tab, and filling-in your username and password.

Getting references into Zotero

Exporting results from PubMed

1. [Conduct a search in PubMed](#)
2. Select the results you want to export by ticking their boxes immediately to the left of the article titles.
3. Just below the search box you will see **Send to**, which lets you send references to **Citation manager**.
4. By default, the system will create a file of the selected references; you can choose to export **All results** or **All results on this page**, if you prefer.
5. Depending on which browser you're using and how it is set up, the downloaded file may be available in the bottom left of the screen. Click the file and your PubMed references should then be directly imported into your Zotero library. In Firefox, you'll be asked **What should Firefox do with this file?** Select **Zotero** (you may need to click on **Other...** and **Browse...** first and navigate to where Zotero is saved [Program Files (x86)]).
6. If this method does not work (e.g., it imports the references into another reference manager you have installed), go to **File > Import...** in Zotero, select '**A file**' then **Next >** and navigate to the file in your Downloads folder. Select it and click **Open**. The references will be imported into a new collection (folder).

Exporting Results from Medline Ovid

1. [On the SOLO homepage](#) under **Useful links** go to **Databases A-Z**.
2. Type **Medline** in the **Search for Databases** box and click **Go**.
3. Click on the link **MEDLINE (Ovid)**. This will open a new window.
4. Conduct your search in **Advanced Search**. For this exercise deselect 'Map Term to Subject Heading' to search with keywords only.

5. In the results, select some (if practicing, choose the first ten) by clicking in the box to the left of each reference. You can export up to 1000 references at a time.
6. When you have selected your results click on **Export**



7. Change the Format to **RIS** and in Fields choose **Complete Reference**. Then click **Export**.
8. Click the file in your browser's downloads to complete the import. If using Firefox, it may ask what to do with the file. Choose **Save File** and then find it in your PC's Downloads folder. Select and right-click it, then choose **Open with > Zotero** (you might need to browse to **Program Files > Zotero**).
9. These new results will now also appear in your Zotero library.

Exporting results from Google Scholar

1. Go to [Google Scholar](https://scholar.google.com) and click on the **three horizontal lines** at the top left-hand corner:



2. Click on **Settings**.
3. Under Search results look at the **Bibliography manager** option, select **Show links to import citations into... RefMan** (this will export a generic '.ris' file that can be imported into Zotero).
4. Click **Save**.

Exporting individual references

1. Conduct your search in Google Scholar – for books, articles, preprints...
2. Each record displayed will have an **Import into RefMan** link. Clicking this will download a file, which will then import into Zotero when you click on it; click OK when asked if you want to import the file and tick the box if you want it to go into a new Collection (Zotero folder).
3. The reference should now be in your Zotero library.

N.B. If you have other reference management software installed, clicking on ‘.ris’ or similar reference export files may import them into the other software, rather than Zotero. To avoid this, find the file in your Downloads folder and right-click on it. You can then choose which app to open it in under Open with >

Exporting multiple references

1. If you are signed-in with a Google account you can export multiple references.
2. Conduct your search in Google Scholar...
3. Click on the star icon below each relevant reference to add it to My library. You will be asked if you’d like to label each as **Reading list** or create a new label. Labelling similar results will enable you to export them together (see point 5. below). (If you don’t want to label (group) it, click the top-left **X** to close the box.)
4. Once you've finished selecting references, click on My library (top-right).
5. You can use the **Export all > RefMan** button above the references to save a ‘.ris’ file that can be imported into Zotero. If you do not want to export all the references in My library, either click on **Import into RefMan**, under each reference you want to export or click on a label title to see the references in it, then use the **Export all > RefMan** button to export them as a group.
6. Click on the downloaded ‘.ris’ file to open it in Zotero. The references should now be in your library.

Adding new references manually

1. Click on **File > New Item...** and choose the most appropriate template from the list.
2. The Info tab in the right-hand pane in Zotero will now be ready for you to type or paste the bibliographic details you have for the item.
3. Complete as many fields as appropriate. As soon as you complete the title field and click on the next one, a new reference will appear in the centre pane.

Using the Zotero Connector browser extension

This Zotero tool can ‘grab’ references from the web – either of a webpage itself or bibliographic details of an item (e.g., journal article) from a database webpage.

1. Open a website or search an online database. If a database, open the full record for the item you would like to capture.
2. Click on the Zotero icon to the right of your browser’s URL/search box (depending on what the Zotero Connector can identify on the page the icon might be a book, a folder, a page, or a PDF [see the Zotero and PDFs section below for more on importing PDFs]).
3. A small dialog box will pop-up confirming what it is saving and where. Use the expand arrow (top-right), choose a Collection (Zotero folder) and click **Done**. If the page you are on gives the folder icon, clicking on the folder will bring up a list of potential references to save. Select the ones you require and click **OK**.
4. Go to Zotero to view the newly added reference(s).

Zotero and PDFs

Zotero can store PDFs in your library, either as standalone items or (ideally) as a ‘child’ of a full reference. You may want to set your preferences to store them only on your computer rather than also sync them to your online account as Zotero only provides 300MB of free

online storage, which is plenty for storing thousands of references but not if they all have PDFs attached. See **Edit > Preferences > Sync pane > Settings** tab – under **File Syncing**, untick both options.

References with an attached PDF have a PDF icon in the paperclip column in the centre pane. As mentioned above, the Zotero Connector browser extension can be used to import a PDF into Zotero from a browser. Alternative methods of adding PDFs are described below.

Importing saved PDFs into Zotero for which you do not already have a reference in your library

1. If you have article PDFs saved on your computer you can easily import them into Zotero, which will then automatically create a reference for them.
2. In a Windows Explorer window, navigate to where the relevant PDF is saved and drag and drop it into Zotero's centre pane.
3. Zotero lets you edit imported metadata – double-click in any field in the right pane (when the reference is selected in the centre pane) to add to or edit its text.
4. This process can be used to import single or multiple PDFs.

Adding PDFs to existing references in your library

1. Find the PDF and save it to your computer.
2. Drag the file and drop it on to the specific reference in the centre pane of Zotero to which it should be attached.

Managing and editing your library

Checking for duplicates

1. To identify duplicate references, click on **Duplicate Items** in the left pane. Suspected duplicates are listed in the centre pane. Make sure you are viewing the list by title so identical titles are adjacent.
2. Zotero encourages users to merge duplicates rather than delete one of them. This ensures that, if one or more of them is currently linked to a Word document as a citation or item in a bibliography, that connection will not be broken.
3. To merge items, select one in the centre pane. Zotero will automatically co-select the other items that it thinks are duplicates.
4. Click the **Merge <number> Items** button in the right pane to merge the items. If the item fields don't match completely, you can select one item to be the “master” from the list at the top of the right pane, then select alternative versions of mismatched fields, if applicable, using the icons to the right of each field.

Zotero currently uses the title, DOI, and ISBN fields to determine duplicates. If these fields match (or are absent), Zotero also compares the years of publication (if they are within a year of each other) and author/creator lists (if at least one author last name plus first initial matches) to determine duplicates.

Grouping your references – Collections and Tags

Zotero allows you to organise your references into **Collections**. For example, you can have separate Collections containing references for different chapters in your thesis or for different articles on which you're working. These have also been described as folders so far in this document, and that is how they appear in the left pane. However, it is important to understand that items can belong to multiple Collections and Subcollections. Adding an

item to multiple Collections does not duplicate it. The **My Library** folder at the top of the left pane will always show you the complete list of references in your library.

1. To create a new Collection, click on the **New Collection...** icon under the File menu.
2. Give it a name.
3. To add references to the Collection, highlight relevant references and drag and drop them into the folder.
4. References can be added to more than one folder. Every reference will also remain within **My Library**.
5. To create a Subcollection, right-click over a Collection and select New Subcollection....
6. Items can also be removed from collections by right-clicking on them.

Tags are an alternative way of sorting and grouping references in Zotero. Often called ‘keywords’ in other contexts, tags allow for detailed characterization of a reference. You can tag items based on their topics, methods, status, ratings, or on your own workflow (e.g., “to-read”). You can filter your library (or a Collection) to show items having a one or more tags. For more information see zotero.org/support/collections_and_tags.

Creating a Bibliography in Zotero

Zotero’s Quick Copy feature quickly creates a bibliography (i.e., a list of references) that you can put in any text document:

1. Select items in the centre column and drag them into any text field. Zotero will automatically create a formatted bibliography.
2. To copy citations instead of references, hold down Shift at the start of the drag.
3. To configure your Quick Copy preferences, open the Zotero preferences menu and select Export.

Inserting references and creating a bibliography

You can use Zotero with **MS Word**, **LibreOffice** and **Google Docs** to insert references and create a bibliography. These are instructions for using the Zotero Word Plugin. For plugins for LibreOffice or Google Docs, see [Word Processor Plugins](#).

The word processor plugins are bundled with Zotero and should be installed automatically when you first start Zotero. You can reinstall the plugins later from the **Cite > Word Processor Plugins** pane of the Zotero preferences. Once installed, you will see a Zotero tab in the ribbon, containing six buttons, including **Add/Edit Citation**, **Add/Edit Bibliography** and **Document Preferences**.

1. Make sure the Zotero app is running.
2. In Word, open a new document and enter some text.
3. Click on the **Zotero** tab on the ribbon.
4. Choose your **Citation Style**, e.g. 'Elsevier – Harvard (with titles)', from the **Document Preferences**. Click OK to close the dialog box.
5. Return to your Word document and place your cursor exactly where you would like the citation to be inserted in the text.
6. Click on **Add/Edit Citation** in the Zotero tab. The citation dialog box will appear – start typing some keywords from the reference you want to cite and all matching references in your library will appear. Click on the one you want and press Enter.
7. Word and Zotero will automatically format the reference, and insert it at the cursor.
8. To insert a **bibliography** at the end of your document, click to a new line (or consider adding a page break), then click **Add/Edit Bibliography**. The references you cited above will appear in full below. If you want to change the citation style after you have started writing and citing, go to **Document Preferences** in the Zotero tab and choose another style. The citations and bibliography references will change automatically.

9. Citations can also be customised – e.g., you might want to add page numbers. For instructions on this see [Customizing Cites in the Zotero Documentation](#).

N.B. If you select a citation style that uses footnotes or endnotes [e.g., Chicago Manual of Style 17th edition (note)], Zotero allows you to choose which in the Document Preferences, and then formats your Word document accordingly. In these cases use Word, not Zotero, to control the style and format of footnotes and endnotes.

Exporting your Zotero library

If you want to create a backup of your library, or send it to someone else, you can export it.

1. Go to **File > Export Library...**
2. Choose the format **Zotero RDF**.
3. Select **Next**, choose where to save it and its filename, then click **Save**. You, or anyone else, will be able to open it by double clicking on it, as long as Zotero is installed.

Useful links

- [Zotero website](#)
- Bodleian Libraries [Managing your references](#)
- Get help from your Bodleian Health Care Libraries [Outreach Librarian](#)