

iSkills for Medicine: Introduction to Zotero (Windows)

Downloading Zotero 7 for Windows

Go to [Zotero | Downloads](#) – the appropriate version should be the one offered in the left panel. Also make sure to also install the Zotero Connector browser extension for your preferred web browser.

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 > Settings**. Choose the **Cite** pane and then scroll down to the **Word Processors** section. 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 > Settings > Sync** pane and filling-in your username and password and clicking on Set Up Syncing.

Getting references into Zotero

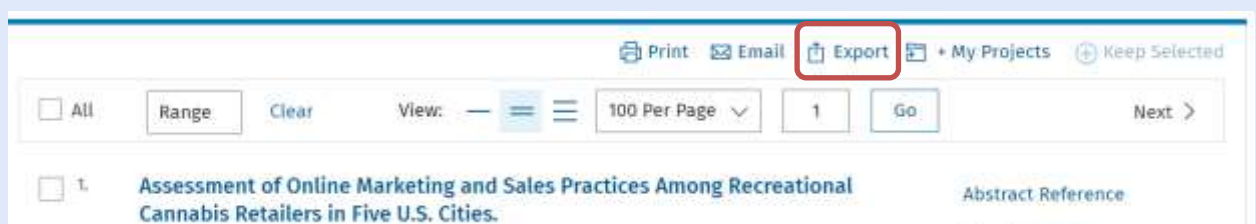
Exporting results from PubMed

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. Any browser you're using should show downloaded files at the top-right of the window. It is more reliable to **not** click on files here but follow the procedure in point 6. below.
6. In Zotero, go to **File > Import...**, keep '**A file...**' selected, then click **Continue** and navigate to the file in your Downloads folder. Select it and click **Open**. The references will be imported into a new Zotero 'collection' (folder).
7. The reference should now be in your Zotero library.

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 few) 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. In Zotero, go to **File > Import...**, keep '**A file...**' selected, then click **Continue** and navigate to the file in your Downloads folder. Select it and click **Open**. The references will be imported into a new Zotero 'collection' (folder).
9. The reference should now be 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.
2. Each record displayed will have an **Import into RefMan** link. Clicking this will download a '.ris' file.
3. In Zotero, go to **File > Import...**, keep '**A file...**' selected, then click **Continue** and navigate to the file in your Downloads folder. Select it and click **Open**. The references will be imported into a new Zotero 'collection' (folder).
4. The reference should now be in your Zotero library.

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. In Zotero, go to **File > Import...**, keep '**A file...**' selected, then click **Continue** and navigate to the file in your Downloads folder. Select it and click **Open**. The references will be imported into a new Zotero 'collection' (folder). (If you do not import into a new collection the references will be added to the collection that is selected at the time, or Unfiled Items if My Library is selected.)
7. 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. Before you start, make sure you can see the Zotero Connector extension icon in the browser you are using. MS Edge, Firefox and Chrome have a jigsaw piece icon for extensions. Find the Zotero Connector under this and click the option to make it permanently visible (e.g., 'Pin' in Chrome).

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 Connector icon – 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 an attachment to 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 > Settings > Sync** pane – 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 online and save it to your computer.
2. Drag the file and drop it on to the specific reference to which it should be attached in the centre pane of Zotero.

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 sorted by title so identical/similar titles are adjacent.
2. Zotero encourages users to merge duplicates rather than delete one or more 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

As we have seen, 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 projects 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 Zotero collections and subcollections. Adding an item to more than one collection *does not duplicate it* – it merely shows you a reference, which exists once in your library, in multiple places. 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 new collection.
4. References can be added to more than one collection. Every reference will also remain within the **My Library** collection.
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. *Unless you want to completely delete an item from your library, make sure to choose 'Remove Item from Collection...'*. Otherwise, choose 'Move Item to Bin...'.

Tags are an alternative way of sorting and grouping references in Zotero. Often called 'keywords' in other contexts, tags allow for customized labelling of a reference. You can tag items based on anything – their topic, 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. You can also colour code tags to make tagged references stand out in your library and collections. Tags are managed in the bottom-left panel of the Zotero app window. You can also easily add an existing tag to multiple references by selecting and dragging the references over the tag in this panel. For more information see [zotero.org/support/collections_and_tags](https://www.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 Settings menu and select **Export**.

Inserting references and creating a bibliography when writing

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 Processors** section of the Zotero Settings. 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](#)