Referencing: Zotero - online training tasks

## 1. Setting up Zotero and creating an account

1.1. Installation

You will need to install 3 separate Zotero components onto your device:

- Zotero application.
- Zotero Connector. This is an extension for your browser which makes it easy to add items to Zotero. Connectors can be downloaded in Chrome, Firefox, Safari and Edge.
- Zotero plug-in for your Word processor (i.e. for Word, Open Office or Libre Office).

If you want to use Zotero on multiple devices, simply follow these installation steps on each device. Your Zotero Library will then synchronise across the computers.
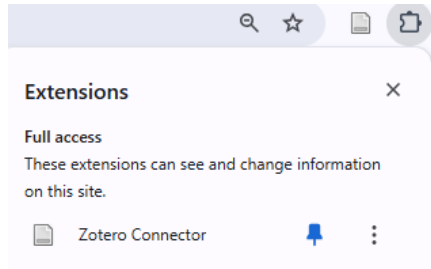
1.1.1. To install the Zotero application:

- Go to www.zotero.org and choose **Download**.
- Download Zotero 7 for Windows or for macOS (you may need to click 'Other versions' to see all available download options).
- Open the file and then follow on-screen instructions to install the application.
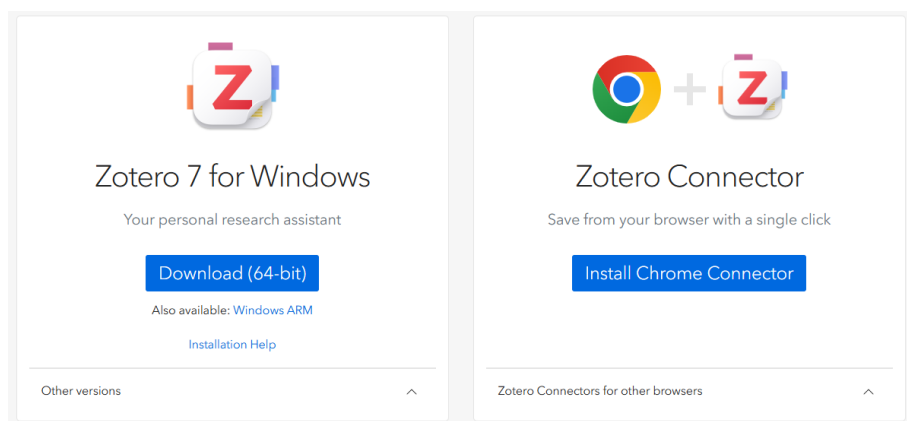
1.1.2. To install the Zotero Connector:

- Go back to https://www.zotero.org/download/.
- Click 'Install Connector' (this should detect the browser you are currently using, but if needed, click 'Zotero Connectors for other browsers' to find the other extensions available to download).

- Follow the on-screen instructions in your browser to install the Connector.
- You will need to pin the Zotero Connector extension into your browser to ensure the icon remains visible. Please see your browser 'Extensions' settings.


1.1.3. To install the plug-in for your Word Processor:

- Open the **Zotero** application once it has been installed on your device.
- For Windows: click **Edit** > **Settings** > **Cite**. Scroll down to the **Word Processors** heading and click on the button to install the Microsoft Word Add-in or for LibreOffice Add-in.
- For Mac: click **Zotero** in the top menu bar > **Preferences** > **Cite**. Click **Enable** next to the Word add-on.

2. Creating an account

If you sign up for a Zotero account, you will be able to access your Zotero Library from many different computers/devices and view your Zotero library on the web.

- Go to www.zotero.org, click **Log in** (top right), then Register for free account and fill in the form. You will be emailed a link to complete registration.
- Now link Zotero application on your computer to your Zotero account. To do this, open the Zotero programme on your computer and:
  - On Windows: click **Edit** > **Settings** > **Sync**.
  - On Mac: click **Zotero** in the menu bar > **Preferences** > **Sync**.
- Enter your Zotero username and password.
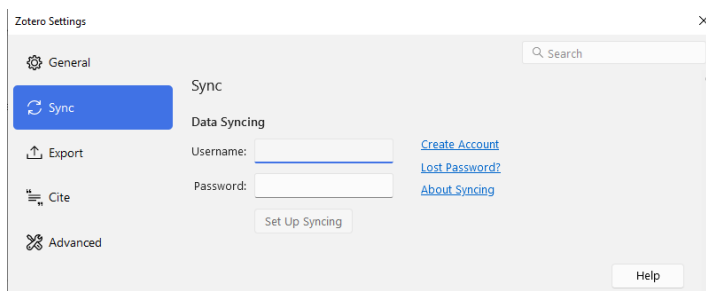
2. Tasks during the online training session

We will pause throughout the online Zotero training session to allow time to complete the following practical tasks in turn. You will need completed all the steps in section 1 - 'Setting up Zotero and creating an account' above to perform the following tasks.

## Task 1: Export a reference from SOLO

- Go to https://solo.bodleian.ox.ac.uk
- Search for **Routledge companion to screen music and sound**
- Click the Zotero Connector icon in your browser, this should currently display as a folder icon depending on your browser 📁
- This will open the Zotero Item Selector in a pop-up box. Tick all the references that you would like to import, including **The Routledge companion to screen music and sound** listed first
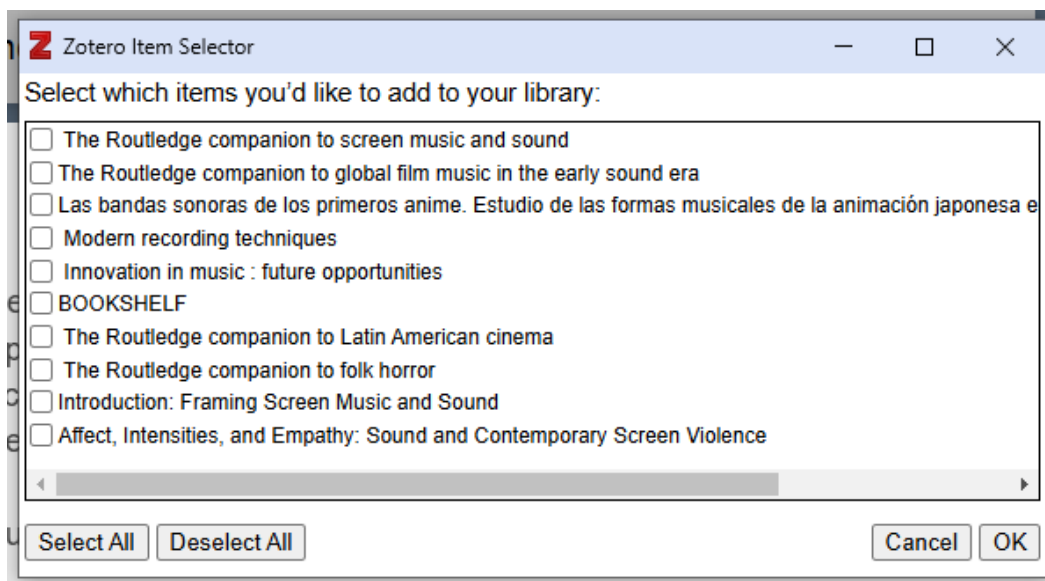
- Please note that the references will import into the selected folder, this will likely default 'My Library' but can be switched to a different folder manually
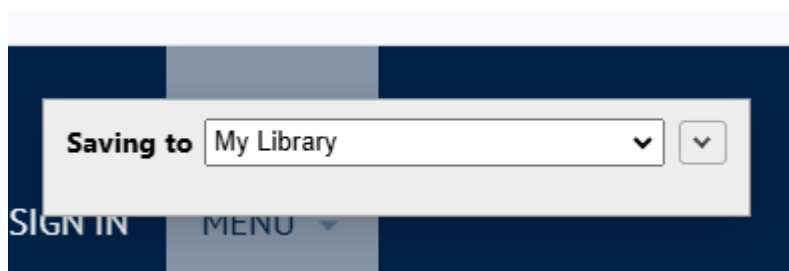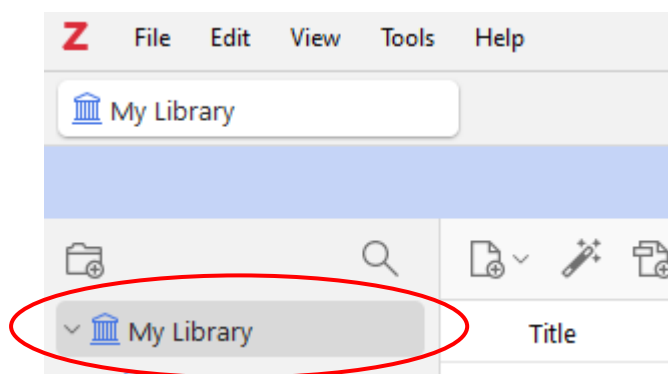

- Click **OK** at the bottom-right of the Zotero Item Selector display
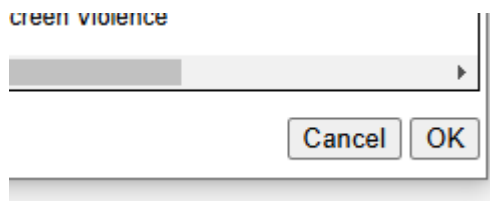
Task 2: Edit an Imported Reference in Zotero

- Open the Zotero application on your device and go to 'My Library' option in the left-navigation panel


- It might be useful to add the 'Date Added' column if it is not already available (right-click on the column headings and tick 'Date Added') and use this to sort the imported references to show the most recently added at the top
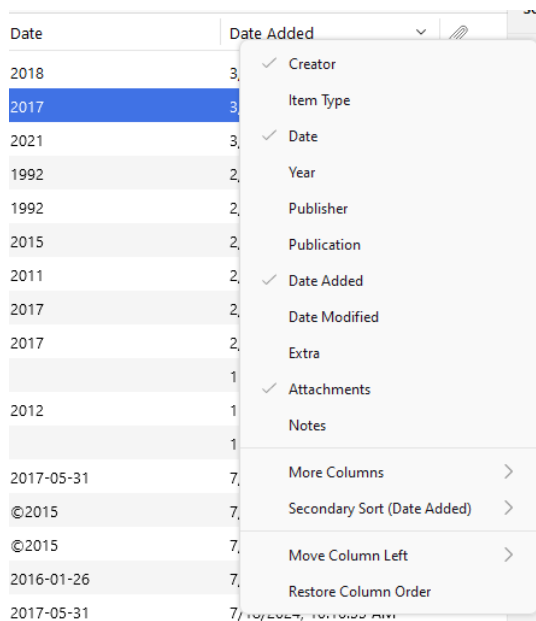
- Select the reference that you want to edit. **The Routledge companion to screen music and sound.** The bibliographic details will appear in the right panel under the Info heading

- Click the 'Author' tab and switch this to 'Editor' in the drop-down menu and make any other necessary edits
- Go to the 'Notes' heading and click the '+' icon to add a personal note onto the reference
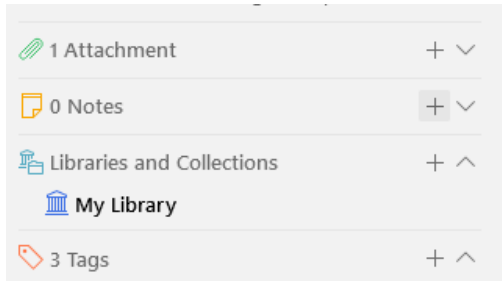

Task 3: Creating and Adding to Collection

- In the left-hand panel in Zotero, right click on **My Library** and click **New Collection**
- Enter the name of your new collection where prompted.
- Click the **Create Collection** button.
- Return to the **My Library** collection and select the reference you wish to add to the folder. You can select multiple references at once by holding down the shift or command key and then click on all the references you want move into a collection.
- Right click on one of the selected references.
- Select the **Add to Collection** option from the drop-down menu and then select the collection you want to add the reference(s) to.
- Alternatively, click on the reference you wish to add, and drag it over to the desired collection listed on the left-hand side of the screen.
- The reference(s) will now appear both in the **My Library** and manually selected collection.

Task 4: Inserting a citation from Zotero into Microsoft Word

- Open Microsoft Word.
- Make sure your cursor is where you would like to insert the citation.
- Click **Zotero** in the ribbon across the top of Word.
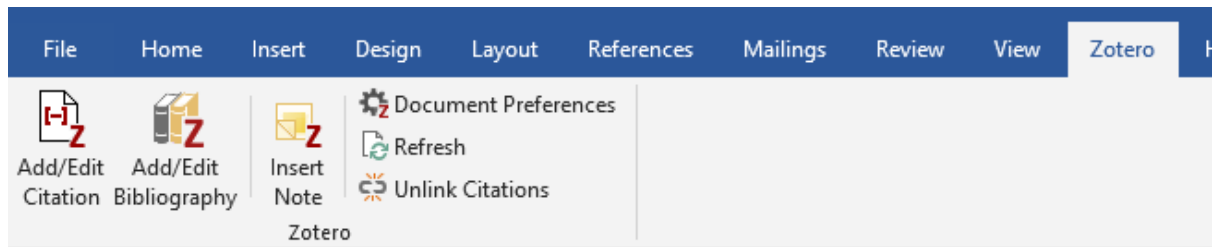
- Click the **Add/Edit Citation** button
- Login to Zotero if prompted and ensure you have installed the Word Processor plug-in (you will need to close Word to install the plug-in)
- Select a **citation style** and **language** option then click **OK** (these can be switched later using the **Document Preferences** option if needed)
- The Zotero search bar will appear

- In the pane, search for a reference using the title/editor/author.
- Select the reference so it is highlighted blue then click the arrow on the right
- The reference will be inserted into the Word document as an in-text citation.

To add your Bibliography

- Move the cursor to the bottom of your document and type the heading Bibliography
- Move the cursor below the heading and then click on **Add/Edit Bibliography** in the Zotero toolbar.
- The full references for any in-text citations will now appear. The bibliography will then automatically update with any subsequent in text citations that you add.