Reference management
Reference management software - Benefits

**Staying organised**
- Stores information about books and papers you may want to cite in one place

**Saving time**
- Formats your in-text citations, footnotes and bibliographies
- Allows you to switch citation styles easily
What does it do...

Collects & Stores your references

Insert references into documents & create bibliographies

Most databases allow you to send information directly to your reference manager (…no need for manual data entry)

You can also:
• store full text articles and your own notes
• share references with others

Formats your references using your chosen citation style (and allows you to switch style easily)
Software options...

Reference management Libguide:
http://libguides.bodleian.ox.ac.uk/reference-management
Zotero
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 required if you need to store more than 300MB of data
Zotero cloud storage
Free or pay for account

Storage
• Up to 300 MG - Free
• 2 GB - $20 per year
• 6 GB - $60 per year
• Unlimited - $120 per year
Installing Zotero
Installing Zotero – 3 components

1. Go to https://www.zotero.org/download/
   Choose “Zotero for Windows” (or Mac) and follow instructions. Save the file to your computer. Once it has saved double click on the file icon and follow on screen instructions.

2. Return to https://www.zotero.org/download/
   Choose one of the browser extensions e.g. Firefox, Chrome, Safari, Opera

3. You will also need to install the Word or Libre Office plug-in. Open Zotero and choose Edit / Preferences followed by Cite. Then choose the Word or LibreOffice plug-in as appropriate.
Setting up a Zotero account allows you to

• backup
• access your Library on the web
• synchronise between different computers and devices

• Register at www.zotero.org (top right)
Linking Zotero with your account

**Zotero Standalone**

- Edit / Preferences / Sync – fill in your username and password
Task 1 – Setting up Zotero & creating an account

• Work through the installation instructions on the handout.
• Ask if you need help
Part 2: Getting references into Zotero

Editing and organising references
A quick tour of Zotero

- **Toolbar and menus**
- **List of documents in selected folder or library**
- **Bibliographic information about the currently selected document**

Filter by tags

Navigate collections and groups
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)
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 (e.g. SOLO)

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
Books added from library catalogues such as SOLO will always use the “author field”. For edited collections change author to editor.
SOLO – amendments to book chapters

Change “Item Type” to “Book section”

Enter the chapter title by hand

Add the name of the chapter author(s). Make sure that the book editor(s) are listed as editor(s)

Add page numbers
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
Adding references by 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

Choose the correct reference type

Fill in as much of the form as possible
Adding a reference using ISBN, DOI or PMID

![Adding a reference using ISBN, DOI or PMID](image)
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
   1. Click File / Import
   2. Browse to find the RIS/BIB/TXT file that you saved to your computer.
What are RIS and BIB files?

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

Make sure you save the file as Type: Text File
File -> Import will bring up the import wizard to upload the file from your computer
Editing references

Select the item

Add personal notes

Add tags

Click in any field to edit

Arrow indicates more than one file is available for the entry e.g. Personal notes; full text PDF; web snapshot.
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
Task 2 – Adding & organising references

• Follow the steps on your hand-out
• Add some references to Zotero
• Organise them using collections and tags
Part 3: 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: Tools > Add-ons.
- Alternatively, you can drag and drop references from Zotero into Word, email etc.
Inserting citations in Word

1. Click Zotero

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

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

4. Alternatively, click on the Z to switch to Classic view (where you can browse your collections) to find references
Adding page numbers etc. to citations

Click on the citation. This will open up a dialogue where you can add page numbers, prefix, suffix etc.
Adding a bibliography in Word

Switch citation style – document preference

Insert list of cited items; add items to the bibliography which you have not cited; remove items which you have cited. You can also use edit to change the formatting of individual items. However, if you do this, the item will no longer be updated when you make changes to your Zotero Library.

This is my essay. I am going to insert a reference here (Evans, 2007) and another one here (Cosgun Ögevik, 2017). Perhaps another one here (McKeachie and Gibbs, 1999).

Bibliography


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 4: 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.
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/](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