

Zotero is reference management software that runs on Mac OS, Windows, and Linux.

The software is installed on your computer but you can use Zotero cloud storage to synchronise your Zotero library across multiple computers and to access your references on the web. The first 300MB of Zotero cloud storage is free but if you exceed this you have to pay an annual subscription. You can easily keep within the free 300MB if you only use Zotero for references/citations and do not use it to store PDFs (or if you store PDFs in your Zotero Library on one computer only).

## 1. Installation

To use Zotero you need to install the software on your computer. It is already installed on the computers at IT Services, However, if you are using your own computer please follow the instructions on the last page of this handout to install

## 2. Registering/Sign up (optional)

You will need to sign up a free Zotero account if you want to do any of the following:

- access your Zotero library from more than one computer
- access your Zotero library on the web
- share references with other people

To sign up for a free account

- Open the Zotero homepage (<http://www.zotero.org>). Click on **Log In** (top right) then click on **Register for a free account**. Fill in the form and click on **Register**.
- You will be emailed a link to click on to complete registration, along with instructions on how to connect your Zotero installation to your new account.
- For more information on using your Zotero library on multiple computers, accessing Zotero on the web and backing up see page 5.



## 2. Opening Zotero

Open Zotero from the Start menu on your computer or from the Zotero icon on your computer's desktop.


### 3. Adding references from a database, e.g. Web of Science

*Use this same procedure with many other online databases, catalogues and search engines.*


*Web of Science is just an example of how this works.*

- Make sure Zotero is open
- Open SOLO (<http://solo.bodleian.ox.ac.uk>) and search for **Web of Science Core Collection**. Under the entry for Web of Science Core Collection, click on **Online Access** followed by Link for Users in Oxford.
- Search for a subject of your choice.
- Select one reference by clicking on its title.
- You should see the icon  either in the URL bar or in the top-right of your browser. Click this and a pop-up window will appear saying the reference is being saved to your library. **Note** that the Zotero Connector icon changes according to the type of web page you are viewing; it might be a folder (when there are multiple items on a page, such as a database or library catalogue), a book, a newspaper, a PDF, a text document, a webpage, etc. Also, you might need to 'pin' or 'show' the Connector extension in your browser's Extensions settings (click the jigsaw piece icon) to ensure that it is always visible.
- Look in your Zotero window. You should see the item you just added in the middle column.
- Return to Web of Science and click **Results for...** on the top left of the screen so that you can see your full list of search results.
- You should see an icon either in the URL bar or in the top right of your browser that looks like a folder . Click this and a pop-up window should appear with a list of the items in your search results. Select which items to add and click **OK**.
- Look in your Zotero window. You should see the item you just added in the middle column. When adding multiple references simultaneously using the folder icon in your web browser, check that they have all appeared in your Library as sometimes Zotero drops a few!

### 3. Using collections to organise your references (a bit like folders)

- In Zotero, click on the **add collection** icon , just above **My Library** to create a new collection. Give it a name.
- Click on **My Library** to view your references again.
- Drag and drop a reference from the middle column into your newly created collection.

### 4. Adding and editing a reference

- In Zotero, click on the **new item** icon 
- From the drop-down menu that appears, select an item type (e.g. book, journal article, etc.)
- In the right column in Zotero, you can add details, such as author, title, etc.
- Your new reference will appear in the middle column in Zotero.
- To edit a reference, click on a reference title to see full details appear in the right column. Click in any field to edit that field's contents.

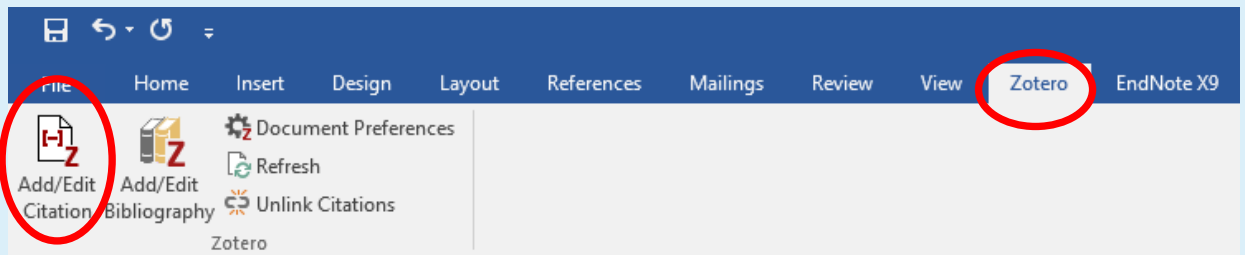
### 5. In-text citation (in MS Word)

To use Zotero with MS Word, you must install an add-in (but note that for this task, we have already installed the add-in on computers at IT Services for you). On your own computer:

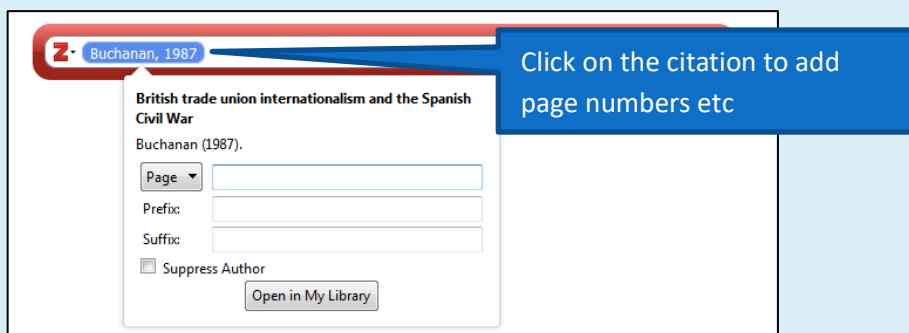
- In Zotero, go to **Tools** and select **Add-ons**. You can then click on the appropriate button to install the add-in for Word or LibreOffice.

Once the add-in is installed:

- Open up MS Word and create a new document.
- Type some text and put your cursor where you want to insert the citation.
- Click on the **Zotero tab** and click on **Add/Edit Citation**.



- Select a citation style and click **OK**.
- A pop-up text box appears. If you know the title or author of the reference you want to insert, start typing, and select the appropriate item when it appears. Then press **Enter**.
- If you want to add a page number, prefix or suffix to a citation, click on it within the Zotero bar. This will pull up a dialogue box where you can add page numbers, prefixes and suffixes.



- If you can't remember which citation you want to add, click **Add/Edit Citation** and then click on the drop-down menu in the Zotero bar and select **Classic View**. Select the reference you want to insert from the list and click **OK**.



## 6. Create a Bibliography (in MS Word)


- Add a couple more references to your document.
- Put your cursor where you want to insert the bibliography.
- Click on the **Zotero tab**, and click on **Add/Edit Bibliography**.

## 7. Create a Bibliography (from Zotero)

- Right click on the folder you created in Zotero.
- Select **Create Bibliography From Collection...**
- Select your citation style, output mode and method, and click on **OK**.

## Other Zotero Features



### Create a webpage snapshot

- Browse to a webpage
- Click on the icon that appears in your address bar or in the top right hand side of your browser 
- Zotero creates a citation referring to the webpage along with a snapshot of the page that can be accessed offline. Click on the **arrow** next to the reference to expand its contents. Double clicking on the webpage item listed below will open the snapshot attachment in your browser.

### Create a group folder to share references with others

*Note: You need to have a Zotero account to use this feature.*


- Go to <https://www.zotero.org/groups/> on the web
- Click **Log in** (top right) and enter your Zotero username and password (if you haven't registered for a Zotero username and password see section 2 above).
- Click on **Create a New Group**.
- Type a name for your new group.
- Select the type of access you would like to give your group (e.g. Public Open, Public Closed or Private).
- Click on **Create Group**.
- Click on **Save Settings**.
- Click on **Members Settings** to invite someone to your group. Click on **Send More Invitations**, provide email addresses and then click on **Invite Members**. *Note: Members will also need to create Zotero accounts.*
- Click on **Groups** to see your newly created group.

- Open Zotero. You should see the Group Libraries and your newly created group folder appear at the bottom of the left column. It may take a few minutes. If it does not appear click on the sync icon, which looks like a round green arrow in the top right corner  .  
Note: This will only work if you have set up your Zotero installation to sync with your Zotero account. See the **Additional Information on Syncing Libraries** section on the next page.
- Drag a reference from the middle column into your newly created group folder to place a copy in the folder, and then force another sync by clicking on the sync icon .
- That reference should now be shown on the Zotero website under your new group, if you click on Group Library.

### Drag and drop references

- Create a new email, Google document, or MS Word document and set your cursor where you would like to insert a reference.
- Open Zotero and drag a reference from the middle column into your email, Google document, or MS Word document.
- The full citation should now appear in your document.

### Add a reference from an identifier

- In Zotero, click on the **icon** at the top of the window that looks like a magic wand  .
- Type in an ISBN, DOI, or a PubMedID. For example, type in **9780205172870**.
- You should see your added reference appear in the middle column.

### Add a reference from a PDF

- Download a PDF version of an article you found when searching **Web of Science**.
- Drag the PDF on to the middle column of Zotero.
- Zotero should automatically create a reference from the PDF's metadata. If it does not, right click on the PDF and from the drop-down menu, select **Retrieve Metadata for PDF** and follow the instructions. *Note: The first time you use this feature, you may be*

*prompted to install additional tools to support this function. After the installation, you will have to re-select **Retrieve Metadata for PDF**.*

- Zotero will retrieve the bibliographic information for the PDF and add it to your library.

### Importing references from text files (.ris, .bib, etc.)

*Note: To try out this task, you need to already have your references in some other reference manager or text format. Ask staff if you have any questions.*

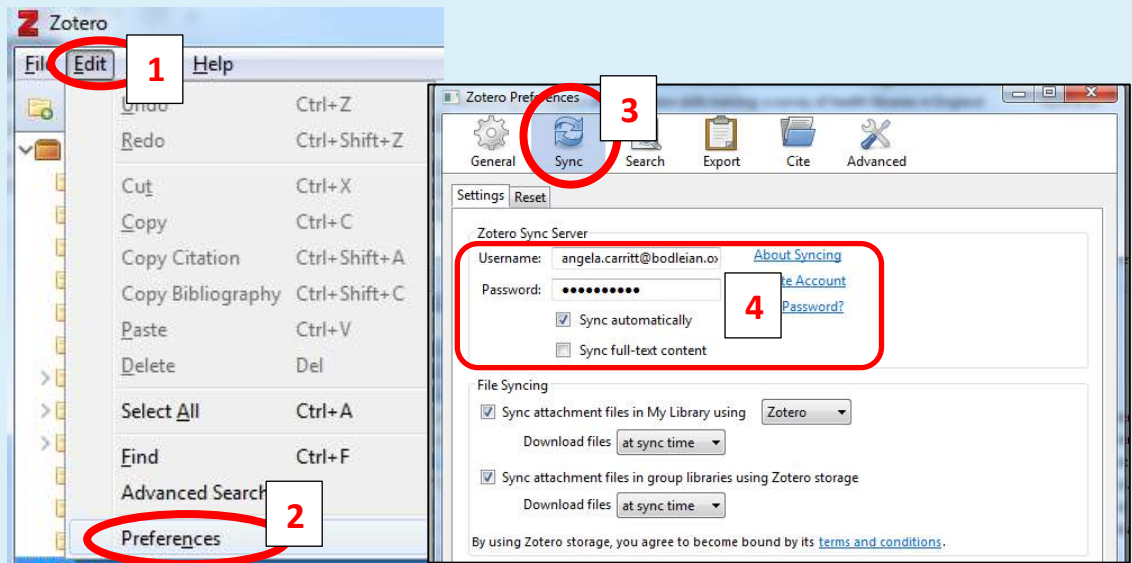
- Click **File**, followed by **Import**.
- In the file browser window that appears, locate and select the file to import.

## Syncing your Zotero Library between computers and backing up

### Syncing your Zotero Library

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

1. Go to [www.zotero.org](http://www.zotero.org)
2. Click **Register** (top right) and fill in the form. You will be emailed a link to complete registration
3. Now link Zotero on your computer to your Zotero account. To do this open Zotero, click **Edit**, followed by **Preferences** and then **Sync**.
4. Fill in your Zotero username and password



5. If you want to use Zotero on more computers, simply follow the installation steps on each computer. Once installed, open Zotero Standalone and click **Edit > Preferences > Sync** and fill in your Zotero username and password. Your Zotero Library will then synchronise across the computers.

### Useful Links

Zotero quick start guide – [http://www.zotero.org/support/quick\\_start\\_guide](http://www.zotero.org/support/quick_start_guide)

Zotero video tutorials – [http://www.zotero.org/support/screencast\\_tutorials](http://www.zotero.org/support/screencast_tutorials)

For further help in using Zotero, contact your subject librarian -

<https://www.bodleian.ox.ac.uk/subjects-and-libraries/subjects/librarians>

## Installing and setting up Zotero

To use Zotero effectively you need to install three components

1. Zotero Programme.
2. A plug-in for your browser which makes it easy to add items to Zotero. Plugs-in are available for Chrome, Firefox and Safari (but not for Internet Explorer/Edge).
3. A plug in for your Word processor (i.e. for Word, Open Office or Libre Office).



To install:

1. Go to [www.zotero.org](http://www.zotero.org) and click **Download**.
2. For Zotero 6.0 for Windows click **Download**, or if you are a Mac or Linux user, select the relevant option under 'Other platforms'. Download and open the file.



3. Next install the browser plug in. Go back to <https://www.zotero.org/download/>. If you are using Chrome, click **Install Chrome Connector** and if you are using another browser, click **Zotero Connectors for other browsers**. Extensions are available for Firefox, Chrome and Safari.
4. Finally, install the **plugin for Word or LibreOffice/OpenOffice**.  
Open **Zotero** and go to **Edit / Preferences**. In the **Cite** pane, click **Word Processors** and choose the option for Microsoft Word or LibreOffice.

