

Introduction to Zotero 7.0

Training Notes (ver 1)

Table of Contents

1. INSTALLING ZOTERO
2. MANUALLY INPUTTING REFERENCES
3. CHOOSING OUTPUT STYLES
4. USING THE ZOTERO CONNECTOR
5. IMPORTING REFERENCES (USING RIS FORMAT)
6. PDF's
7. COLLECTIONS
8. NOTES
9. USING ZOTERO WITH MICROSOFT WORD

APPENDIX

- A. ZOTERO & SYNCING YOUR LIBRARY
- B. PREFERENCES

HELP?

- The Help function can also provide assistance by clicking on Help on the menu.

1. INSTALLING ZOTERO

Zotero is a free bibliographic referencing program, which can be download from www.zotero.org. Zotero includes three elements:

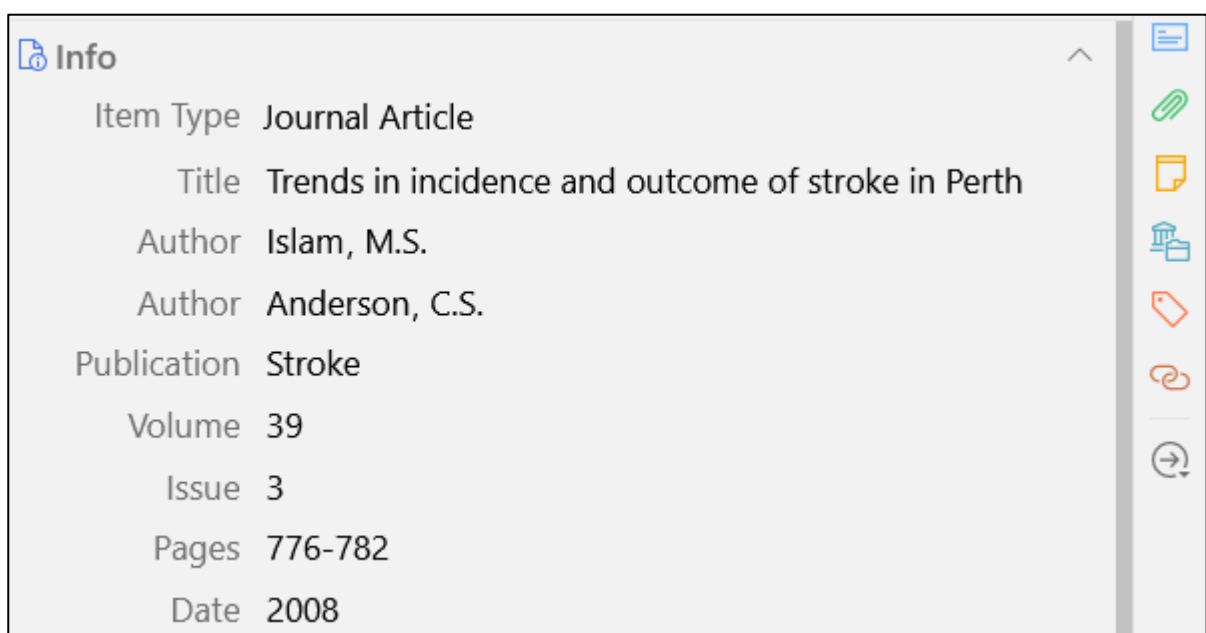
- The Zotero program for Windows or MAC
- Zotero Connector plugin for Google Chrome, or other browsers
- MS Word Add-in Zotero Toolbar

Generally all three parts will be automatically installed at setup. If the Word toolbar is not working, this can be reset under the Zotero preferences > Cite.

2. MANUALLY INPUTTING REFERENCES

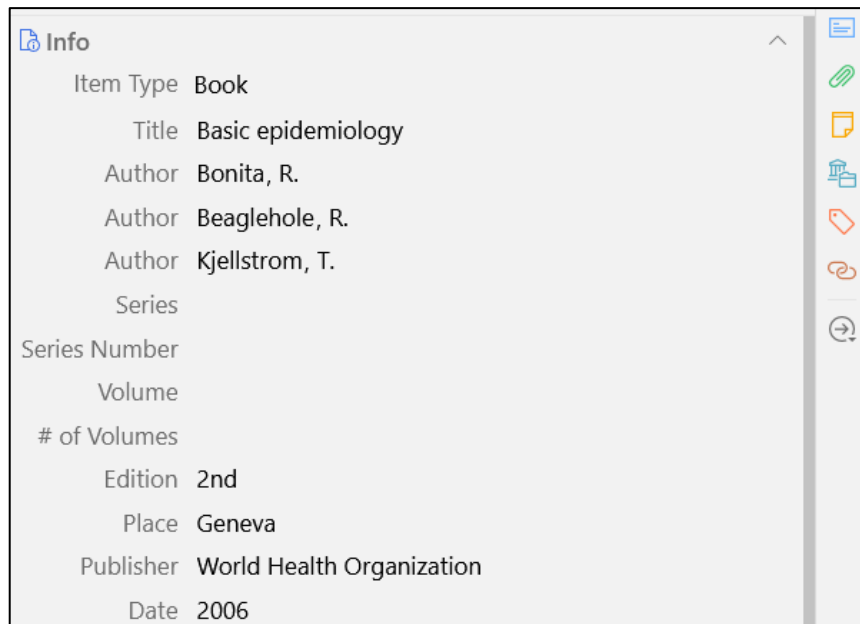
Although it is much faster to input reference data using bibliographic databases or using the Zotero connector, sometimes references from books or journals will need to be typed (or edited) in your Zotero library manually.

1. Click the page+ icon; or File> New Item
2. Select type of reference from the pull-down box, Journal Article or Book are the most commonly used.
3. For example type in the following Journal Article



TIP: When entering Author names with initials, follow each initial with a full-stop, ie Anderson, C.S.

Zotero fields used for Book references



Reference in bibliography when formatted for **Vancouver (superscript)** style:

1. Bonita R, Beaglehole R, Kjellstrom T. Basic epidemiology. 2nd ed. Geneva: World Health Organization; 2006.

Reference in bibliography when formatted for **Monash - Harvard** style:

Bonita R, Beaglehole R and Kjellstrom T (2006) Basic epidemiology, 2nd edn, World Health Organization, Geneva.

Reference in bibliography when formatted for **APA (7th ed.)**:

Bonita, R., Beaglehole, R., & Kjellstrom, T. (2006). Basic epidemiology (2nd ed.). Geneva: World Health Organization.

Please note: Zotero does not have a format for **Webpage** which can be selected from the pull-down for manual entry of web references. Instead you will need to use the Zotero Connector to extract reference data when browsing webpages. Section 4 explains how to use the Zotero Connector.

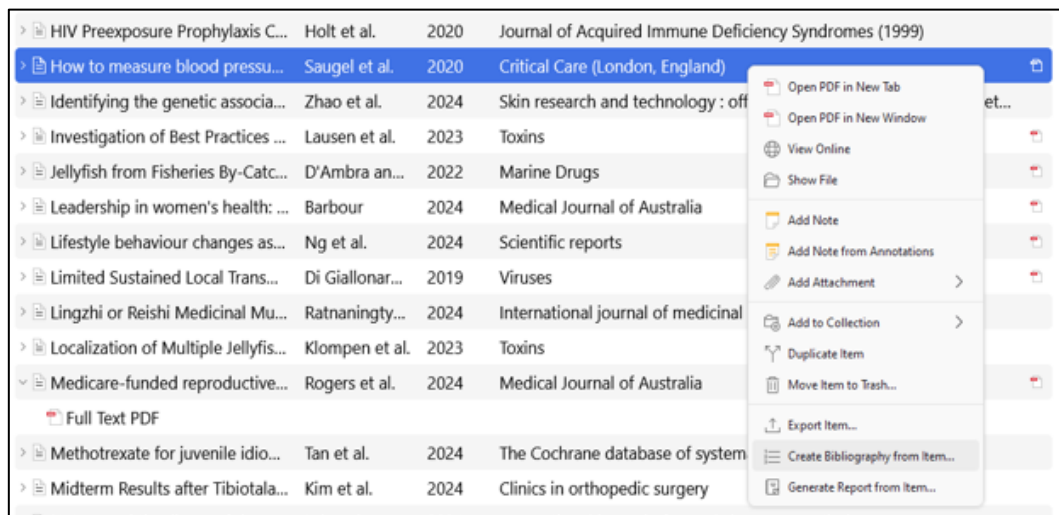
3. CHOOSING OUTPUT STYLES

Your referencing style can be selected by either the Zotero program or via the Word toolbar.

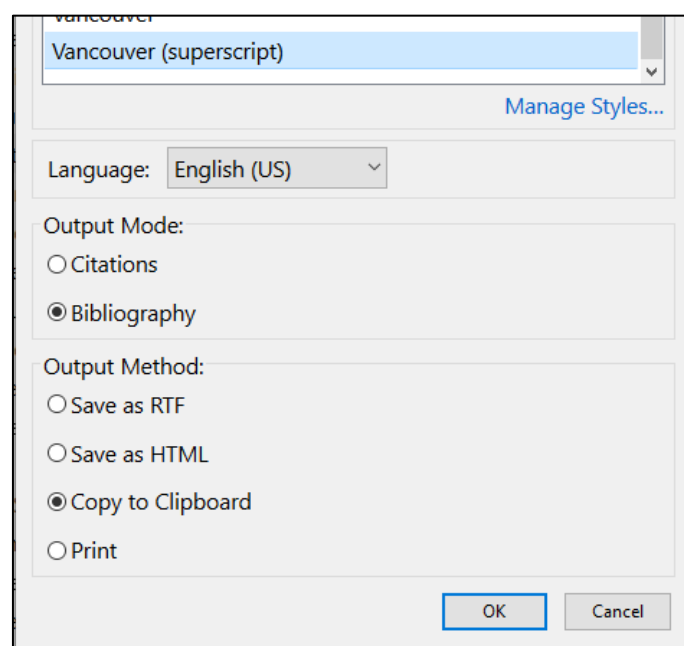
- **Zotero program:** >Edit (Windows) > Settings>Cite >Styles and choose your style, or follow link to *Get additional styles*
- **Word Zotero toolbar** >Document preferences > Choose preferred style from pull-down menu

How to quickly see a formatted reference for a selected Output style

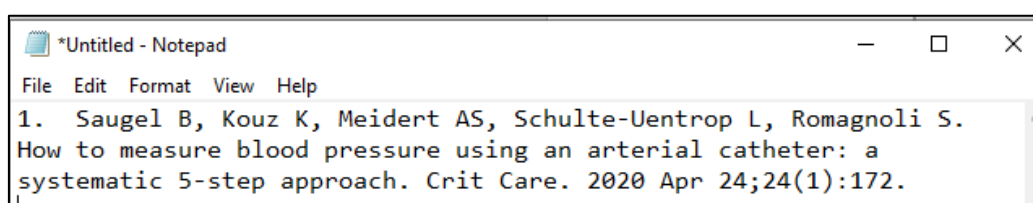
Zotero does not display the formatted references within the Zotero program window. The easiest way to do a quick check of the output that would appear in your bibliography is to highlight a specific reference in your display list, do a right-hand click and select Create Bibliography from Item



Then from the pop-up dialogue box select Output mode: Bibliography and Output Method: Copy to Clipboard, click OK.

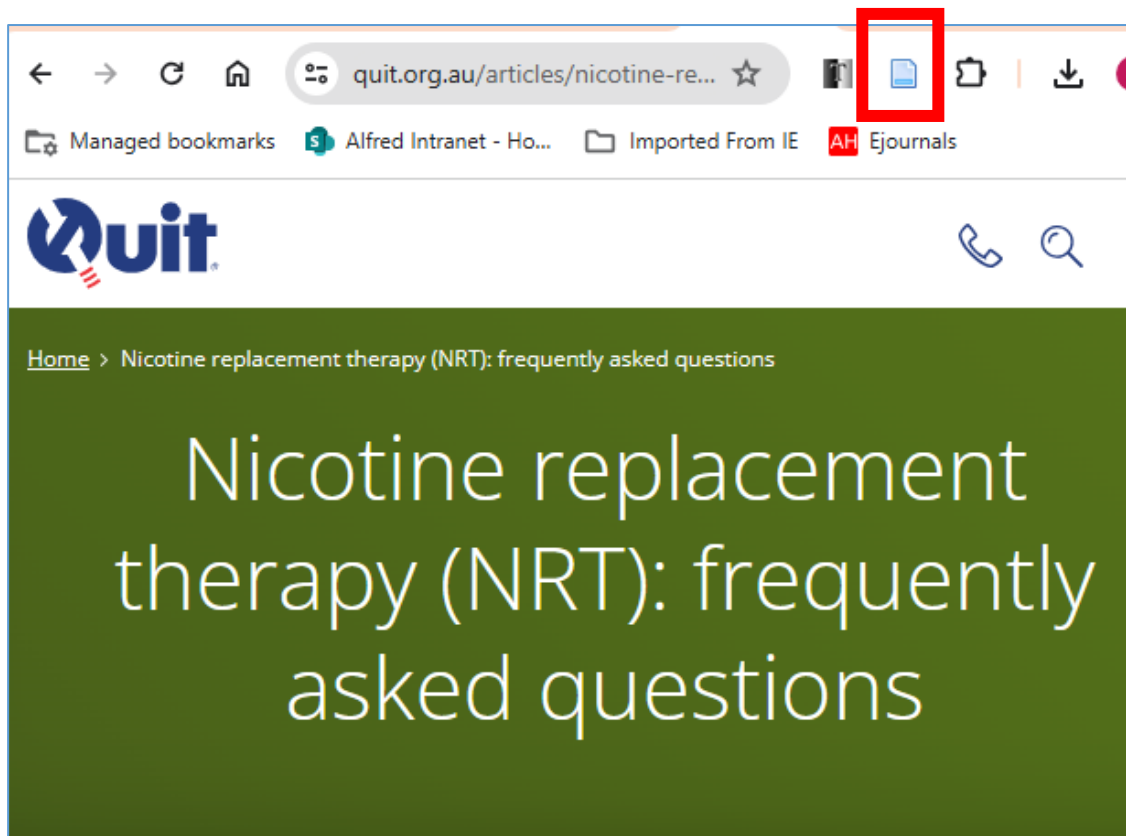


Then paste the copied reference into Notepad (Windows) or TextEdit (MAC):



4. USING THE ZOTERO CONNECTOR

When browsing online resources the Zotero connector plugin can detect documents, article pdfs and webpages and send reference data through to your library. For website information the Zotero icon turns to a pale blue symbol. After clicking on the symbol the **Zotero Item Selector** will appear, and allow you to choose which collection to use. It is important to check what information is actually retrieved, and correct the data if necessary.



Info

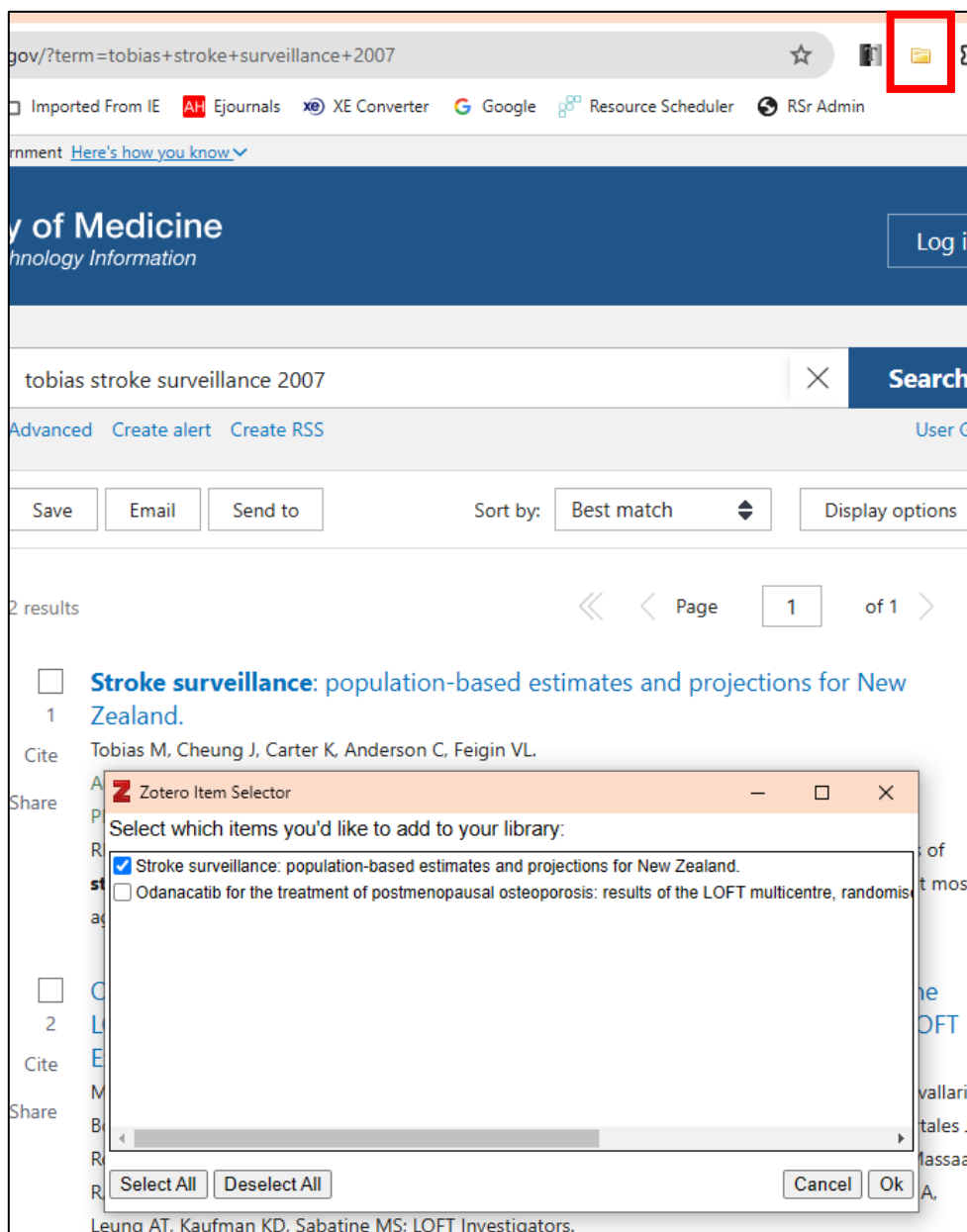
Item Type	Web Page
Title	Nicotine Replacement Therapy (NRT) - What is NRT?
Author	(last), (first)
Website Title	Quit
Website Type	
Date	
Short Title	
URL	https://www.quit.org.au/articles/nicotine-replacement- ...
Accessed	8/26/2024, 1:39:02 PM
Language	en
Rights	
Extra	
Date Added	8/26/2024, 1:39:02 PM

In the example above the subtitle of the downloaded title is incorrect and would need to be corrected, and the author Quit Victoria needs to be input into the author field, and removed from the Website title. After making those changes, the cited bibliography reference would format in the Vancouver style as:

1. Quit Victoria. Nicotine Replacement Therapy (NRT) : frequently asked questions [Internet]. [cited 2024 Aug 26]. Available from: <https://www.quit.org.au/articles/nicotine-replacement-therapy-frequently-asked-questions>

When using a library catalogue, ejournals or health information databases the icon of the Zotero Connector will change to represent that resource. Ejournals, catalogues and ejournals can allow multiple items to be selected using the Zotero Item Selector. Free PDF's will also be automatically downloaded.

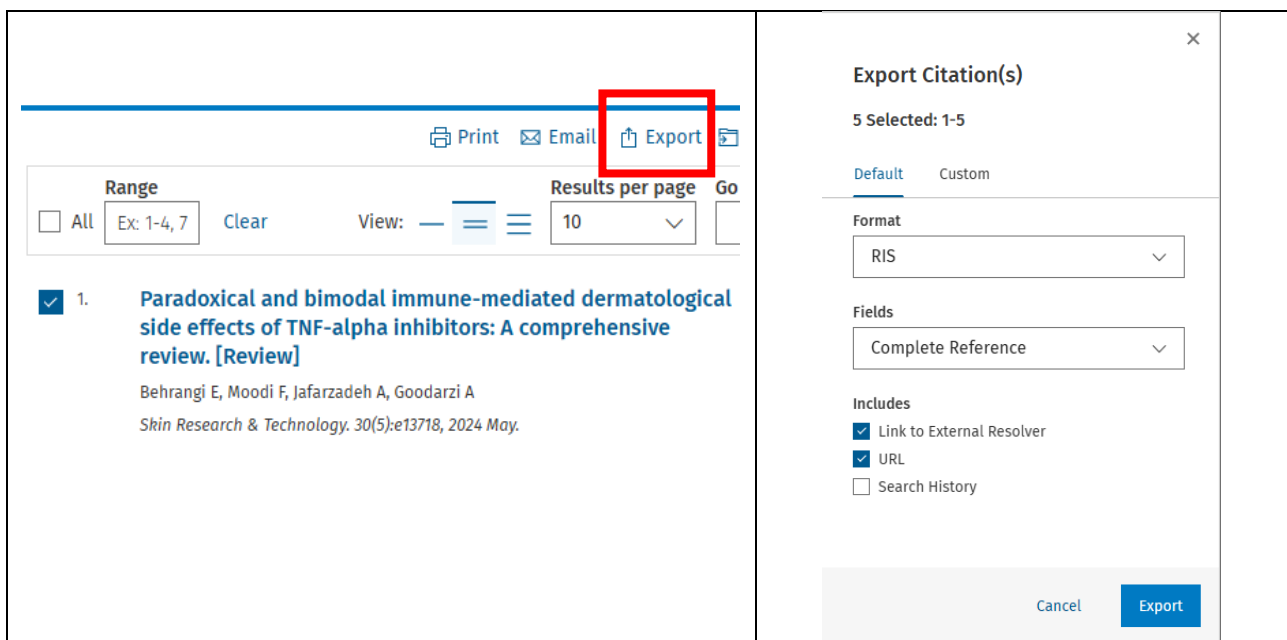
PubMed (pubmed.gov) works well with Zotero Connector.



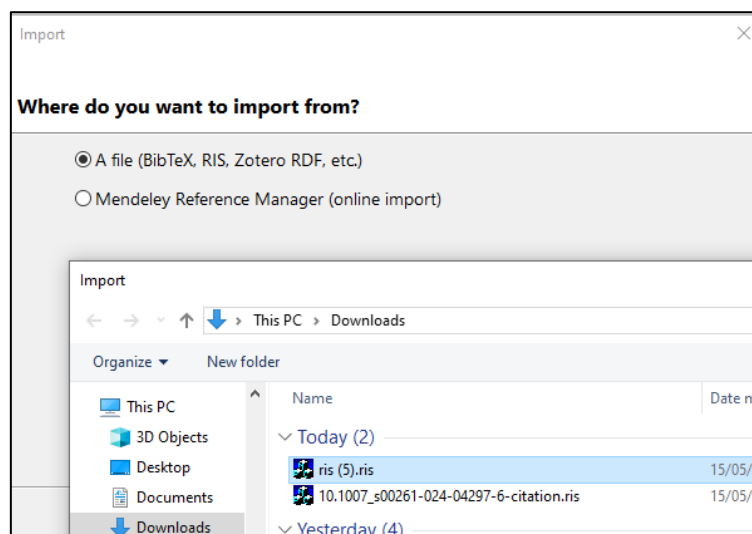
If the Zotero Connector gives the error message **"An error occurred while saving this item"**, you will need to download references in the RIS format, and then import the file into Zotero. This is explained in the next section.

5. IMPORTING REFERENCES (USING RIS FORMAT)

Databases and ejournals will generally provide a method to download citations as a file. When using Zotero it is important to choose the **RIS** (or "Refman") format option. For instance, when exporting citations from **Ovid Medline** change the format to RIS, and fields to Complete Reference, and export.

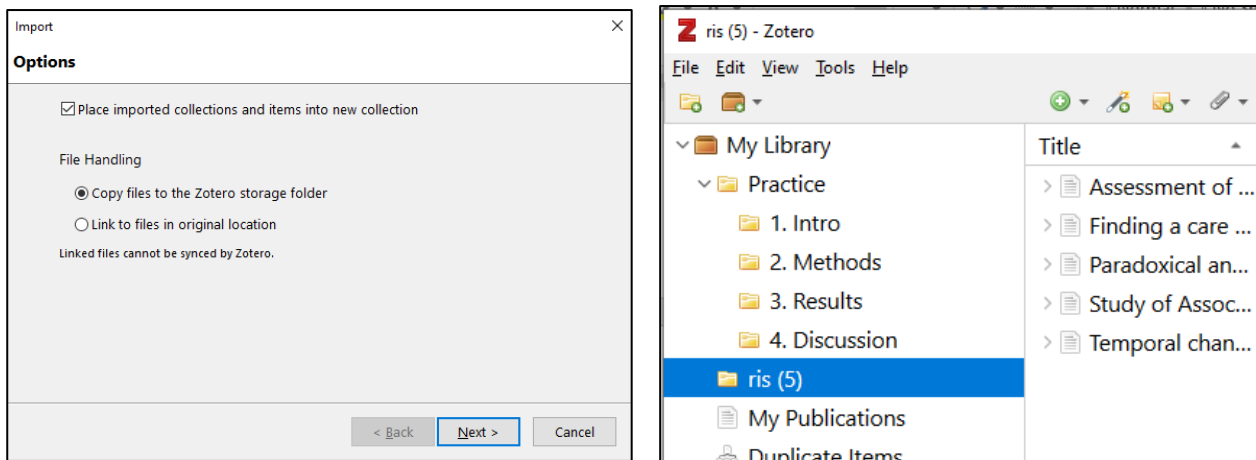


Then from Zotero go to File > Import > select the **A file** option and click Next



Select the RIS file you wish to import from your downloads folder and click Open, and then on the next Zotero dialogue box select the options you want and click Next to import the records into Zotero. If the **Place .. into new**

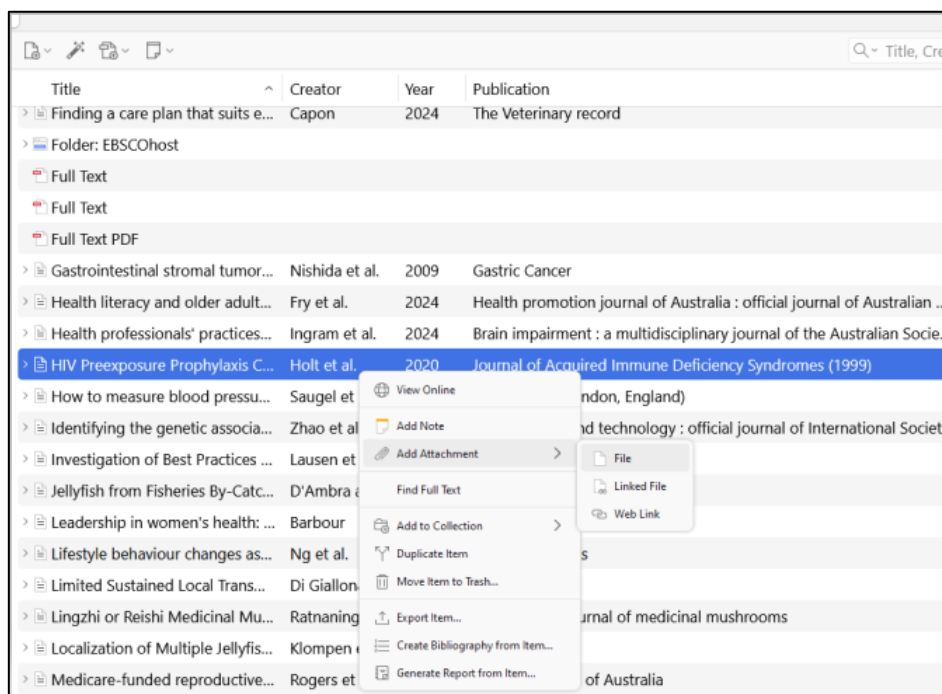
collection option is ticked, Zotero will not file the new references into any specific collection. The references will be filed into a temporary “ris” collection which allows for viewing, filing, and then deletion of the “ris” collection.



6. PDF's

PDF's and ATTACHMENTS

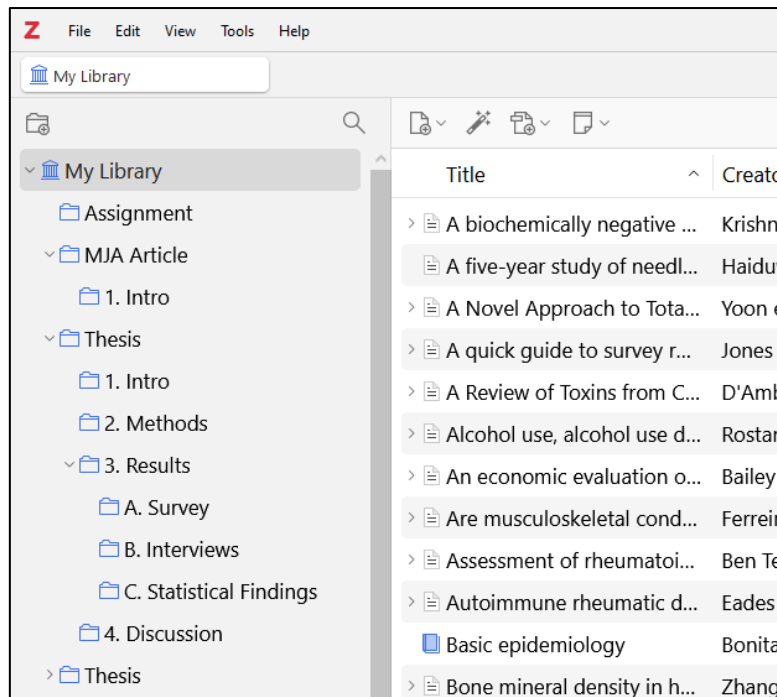
If you wish to link references to PDF's (or other document types), this can be done manually by highlighting a reference in Zotero and right-hand clicking and selecting from the pull-down **Add Attachment** > File.



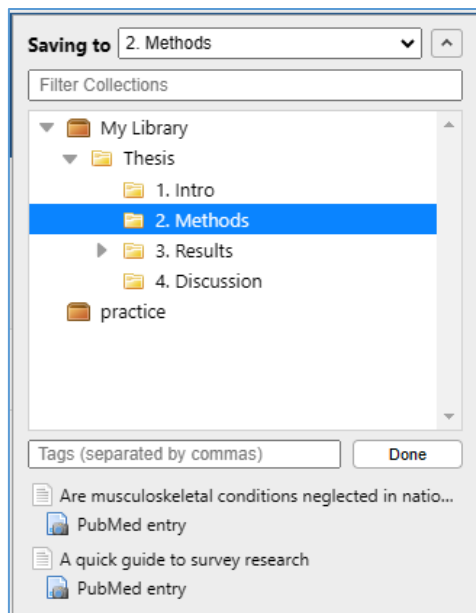
Also available in the pull-down is **Find Full Text**, which will search for available PDF's for download. A small pdf ICON will appear on the right-hand side of records when a pdf is attached. By double-clicking on a listed reference the article pdf will appear for reading and making notes.

7. COLLECTIONS

References in your Zotero library can be organised by creating Collections, and then adding or moving references by dragging and dropping. Collections can be organised by topic, or into parts of a document project. Create a collection by clicking on the folder+ icon. Subcollection folders can also be created within collection folders using the right-hand click. Deleting references from collections does not remove references from the main Library.

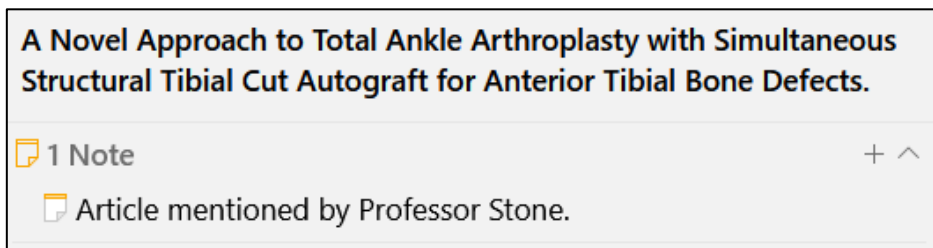


When using the Zotero Connector you can indicate which folder you want to file downloaded references, and later when writing documents in Word, references to cite can also be displayed at the Collection level.

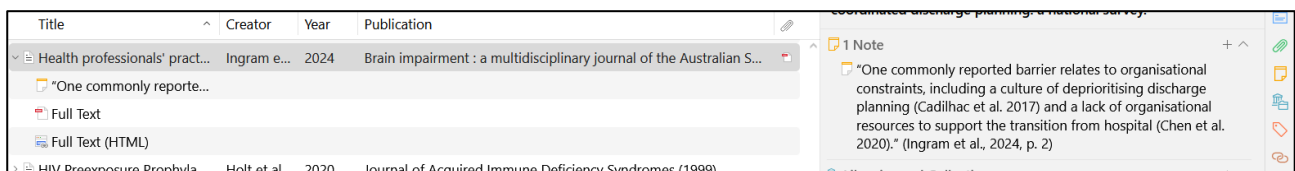


8. NOTES

Notes for a specific references in a Zotero library can be created either by highlighting a reference and clicking on the Notes tab on the right-hand panel, or when reading pdfs, clicking on the Notes icon.



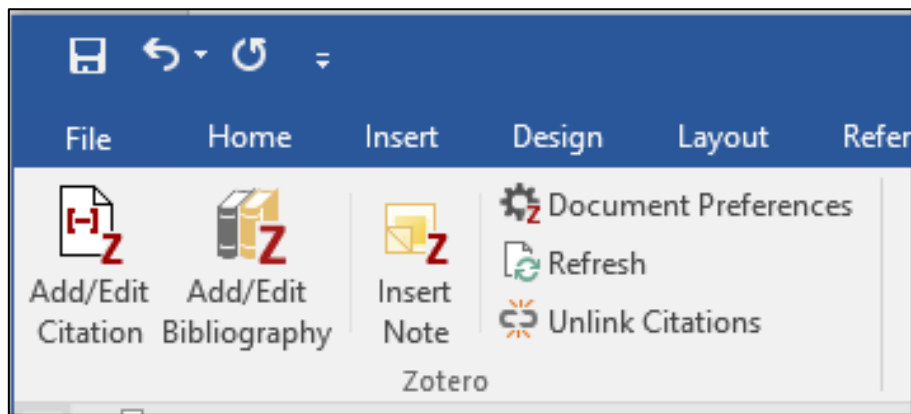
The presences of notes and other attachments like pdfs will be listed under references. These can be viewed using the right-hand panel.



9. USING ZOTERO WITH MICROSOFT WORD

When Zotero is installed on a computer, a Zotero toolbar is added to Microsoft Word. Icons are available to **Add/Edit Citation** into the document text, and **Add/Edit Bibliography** to format at the end of a document.

Other important icons are **Document Preferences** to select or change the referencing style, **Refresh** to update the Bibliography, and **Unlink Citations** to remove field codes.



Class Exercise :

Document

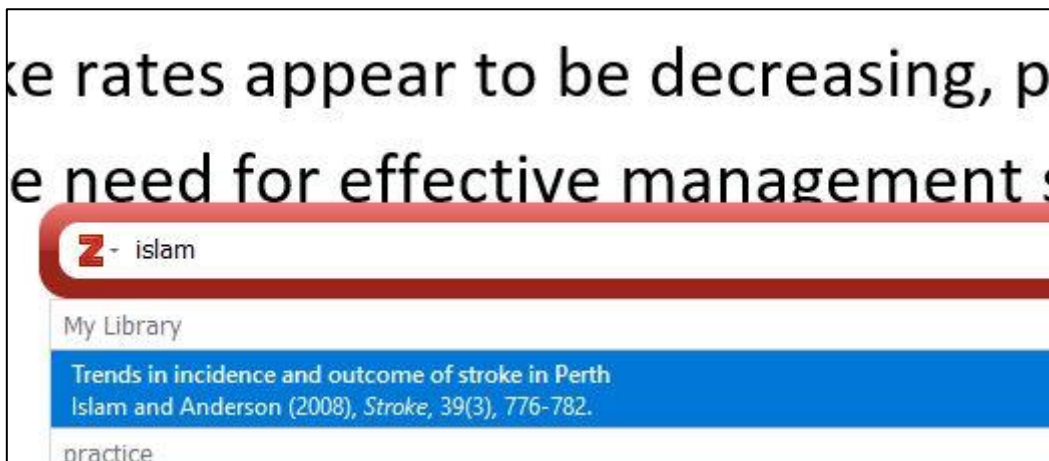
Although stroke rates appear to be decreasing,¹ population ageing will intensify the disease and the need for effective management strategies.²

Bibliography

1. Islam MS, Anderson CS, Hankey GJ, Hardie K, Carter K, Broadhurst R, et al. Trends in incidence and outcome of stroke in Perth, Western Australia during 1989 to 2001: the Perth Community Stroke Study. *Stroke* 2008;39(3):776-82.
2. Tobias M, Cheung J, Carter K, Anderson C, Feigin VL. Stroke surveillance: population-based estimates and projections for New Zealand. *Aust N Z J Public Health* 2007;31(6):520-5.

STEPS TO USING ZOTERO WITH WORD

1. Use the Document preferences to set citation style.
2. Position cursor where you want an in-text citation placed.
3. Use **Add/Edit Citation** icon to open the red Zotero citation manager. To find a reference to cite enter name or title words. Select required reference(s) from blue suggestions. This also allow you to edit citations.



4. Insert the citation into the document by clicking on the right-hand arrow inside the red citation manager.

Document

Although stroke rates appear to be decreasing, {Citation} population age intensify the disease and the need for effective management strategies



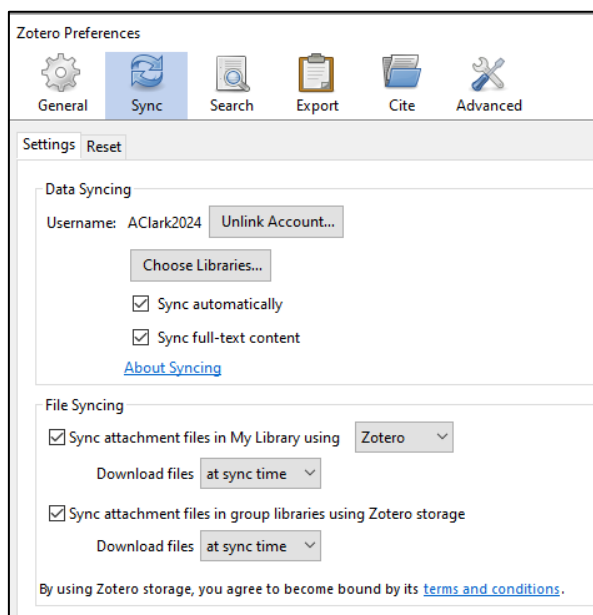
5. Type **Bibliography** at the end of your document. Place cursor below Bibliography heading, and click on the **Add/Edit Bibliography** icon.

APPENDIX

A. ZOTERO AND SYNCING YOUR LIBRARY

Zotero users have the option to create a **Zotero.org** account, which is very useful as a backup of your library, and also if you use a number of devices.

Syncing can be switched on by setting up the syncing setting in Preferences.



B. PREFERENCES

Suggested settings in Zotero **Preferences**:

- General > Miscellaneous > turn automatic tagging OFF
- Sync > Sync automatically ON
- Cite > Style Manager > Vancouver (superscript)
- Cite > Citation Options > Include URLs OFF

Suggested setting in Word Zotero Toolbar **Document Preferences**:

- Advanced options**
- Use MEDLINE journal abbreviations ON