



zotero

How to use Zotero

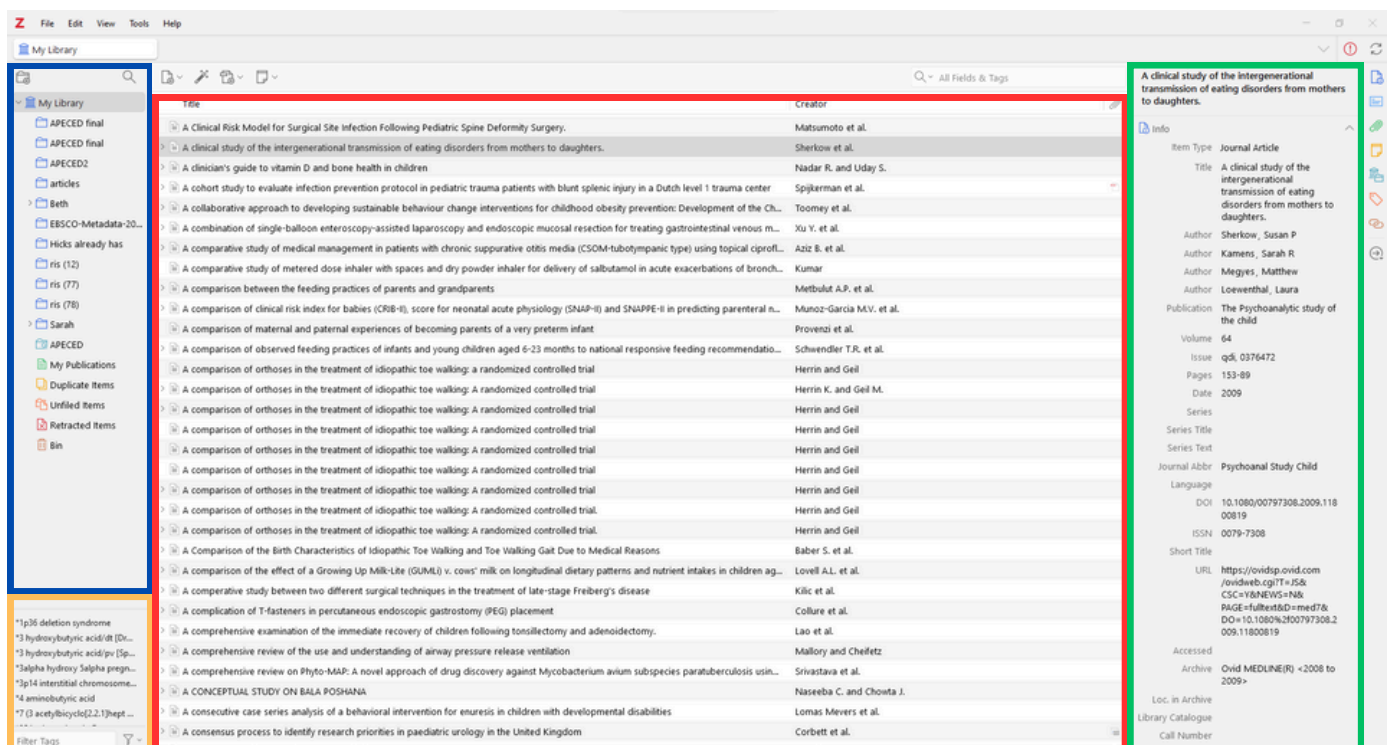
What is Zotero?

Zotero is reference management software - you can use it to build a library of references to journal articles, books, reports, and much more. You can then use the information captured in Zotero to create citations and bibliographies in a wide array of referencing styles.

For a guide to installing and setting up Zotero, see the separate guide 'How to set up Zotero'.

Overview

Zotero has a fairly simple interface. You can see an example of the main screen below:



The **blue box** shows the area where you will find your folders, or 'collections'.

The **red box** shows your library, where you will find the entries for the journal articles, books, conference abstracts etc. that you save.

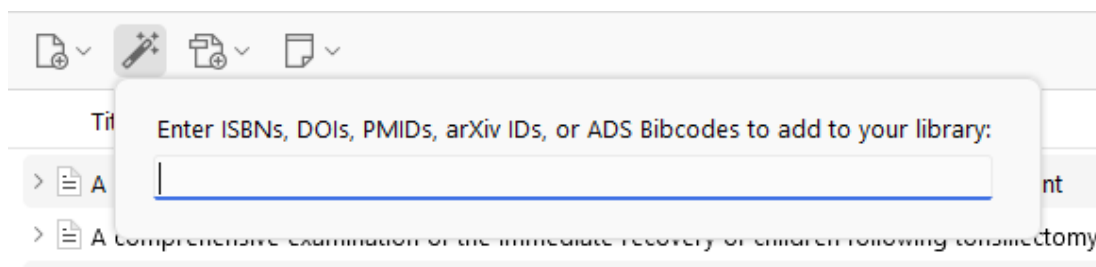
The **green box** shows the information for the selected item in your library; this is what Zotero uses to create a citation or bibliographic entry. When using the Zotero web connector to save items, this information is pulled across automatically; however, you can also edit this information if there are any inaccuracies.

The **orange box** shows the tags attached to entries in your library; these are pulled automatically when saving an item using the Zotero web connector, or you can edit these yourself in the item's information.

Adding items to your library

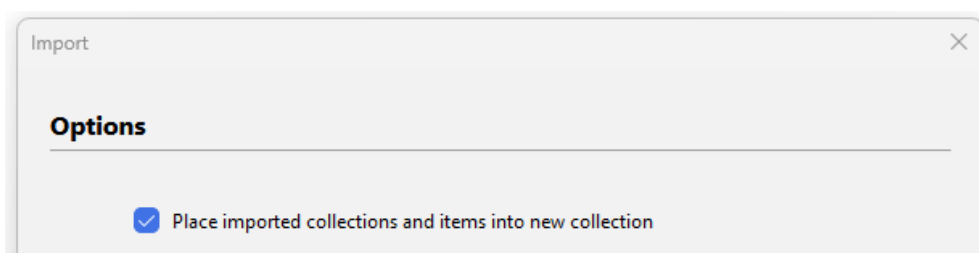
There are a few ways to add items to your library. The quickest is using the Zotero web connector, which is an add-on for your browser; see the '**How to set up Zotero**' guide for information on how to install this. If you click on the connector when looking at an item you'd like to save on your browser, such as a PubMed entry, it will save a record of that item to whatever folder you have open on Zotero at that moment.

You can also use the magic wand icon in Zotero to pull information. This icon can be found on the toolbar above the items window:



If you know any of the information required, you can type or paste it here and press ENTER on your keyboard; the information to create the item record will be pulled from the internet. This is a good alternative if the web connector is not working.

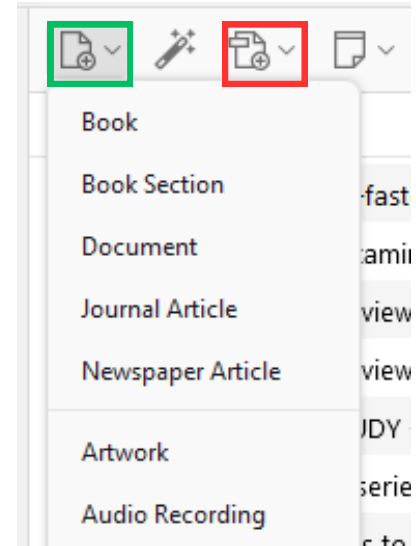
If you have been sent a .ris file, perhaps containing items from someone else's Zotero library, you can add these items to your library by going to **File > Import** and selecting the .ris file. This will then add the items in this file to the folder you have open at that time; alternatively, you can select the option shown below to create a new folder.



Finally, you can manually add an item; you may choose to do this if you want to save a record for a physical item, such as a book.

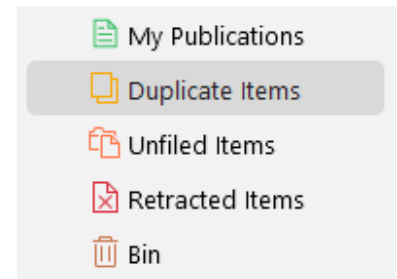
You can use the icon in the **green box** to add an item record from scratch; there are a range of options to choose from.

If you have a PDF of an item and you want that to be included with the record, you can add that using the icon in the **red box**; you can then edit the record's information in the window on the right of the screen.



Merging duplicate items

You may find that, over time, you save the same item more than once. Rather than going through each folder in your library to find these, there is a folder in the left window called **'duplicate items'**, where Zotero groups all of the items it believes may be duplicates.



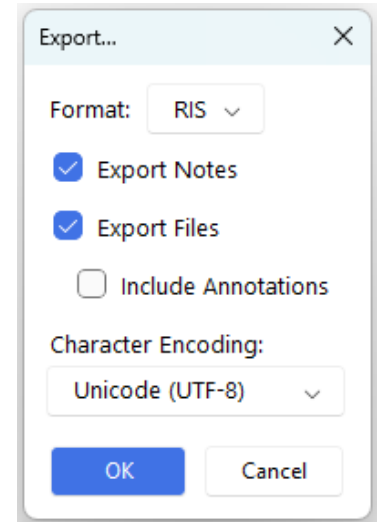
To merge duplicates, select a file and it will automatically select its duplicates with it. If the information associated with each version is slightly different, Zotero will allow you to select a 'master item' in the window on the right of the screen; if you aren't sure which one to pick, you can select each one in the **orange box** to see what information each option has. Once you have chosen, you can click **'merge items'**, in the **blue box**.

Merge 9 items	
Choose the version of the item to use as the master item:	
21/06/2024, 14:57:17	
24/06/2024, 11:18:11	
24/06/2024, 11:20:16	
24/06/2024, 11:40:40	
24/06/2024, 12:36:12	
24/06/2024, 12:36:12	
24/06/2024, 14:21:03	
24/06/2024, 14:39:37	
24/06/2024, 15:12:36	
Select fields to keep from other versions of the item:	
Item Type	Journal Article
Title	A comparison of orthoses in the treatment of idiopathic toe walking: a randomized controlled trial
Author	Herrin, K
Author	Geil, M
Publication	Prosthetics and orthotics international
Volume	40
Issue	2
Pages	262-269
Date	2016
Journal Abbr	Prosthetics and orthotics international
Language	
DOI	10.1177/0309364614564023
ISSN	
Short Title	

Exporting items and collections

If you want to export an item in your library to share with someone else, you can do so by right-clicking on the item and selecting **'export item'**. Make sure that the format is set to **RIS**. If there is a PDF attached to the item, ticking **'export files'** will allow this to be shared. Set character encoding to **'Unicode (UTF-8)'**.

You can follow the same process to export an entire collection; right-click on the folder in the left of the screen and select **'export collection'**.

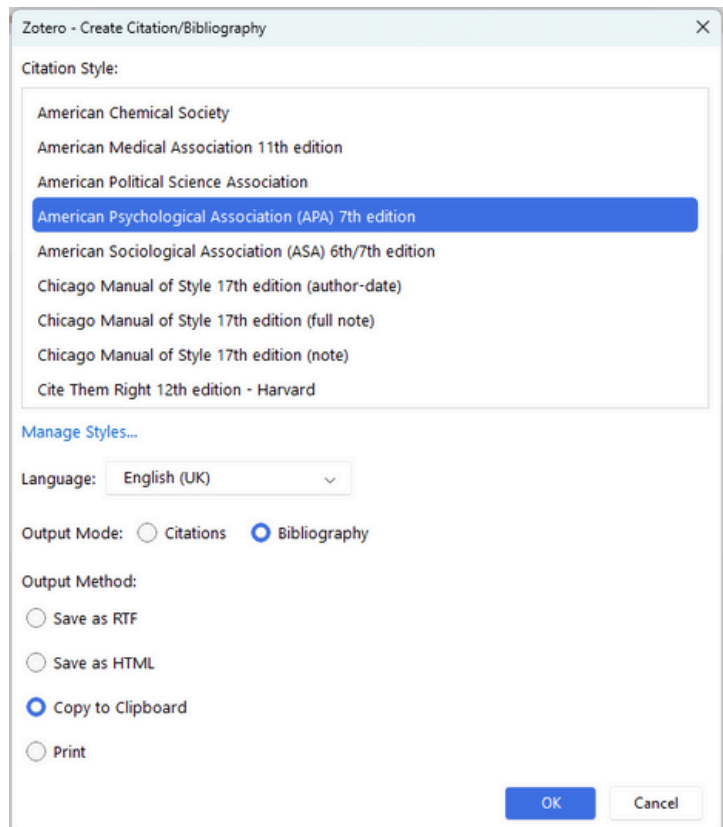


Creating a bibliography

You can create a bibliography from a single item or from an entire collection. To do this, you first need to make sure that the information associated with each record is correct, including the item type, as this is what Zotero will use to create each bibliographic entry.

Right-click on an item and select **'create bibliography from item'**. This will then bring up the window seen here. Select your citation style and language, and make sure the output mode is set to **'bibliography'**.

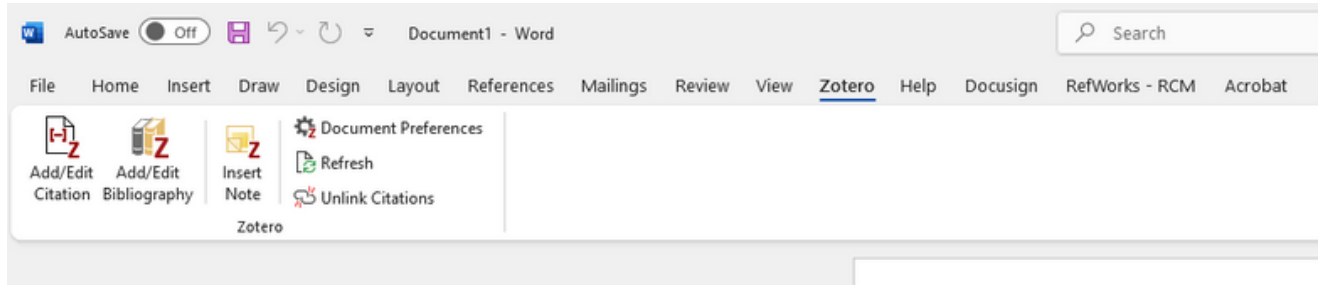
To copy and paste the result into a word processing document, select **'copy to clipboard'**, and then press OK. Go to your word processing document, where you would like the bibliography to be, and paste the results (either by right-clicking and selecting **'paste'** or by typing **Control + V** on your keyboard). You should then have a bibliography, which you can edit and format.



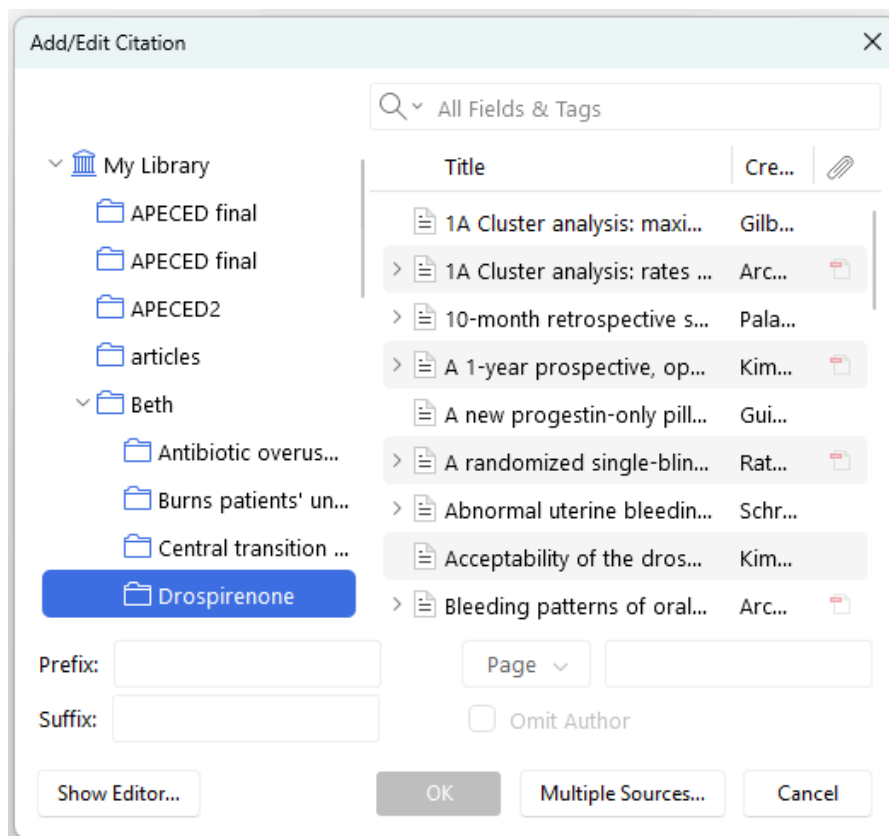
You can follow the same process to create a bibliography from an entire collection; instead, right-click on the folder at the left of your screen and select **'create bibliography from collection'**.

Using Zotero in Word

Zotero should automatically install its add-ons in Word when you download it. To check this has happened, open up Word and check that Zotero appears as a tab in the ribbon.



When you are writing and you wish to add a citation, make sure Zotero is open on your computer and then select **Zotero > Add/Edit Citation** in Word. It may ask you to select a citation style; choose your preferred style and click OK. In the next window, you can then select the item you would like to cite, as can be seen below:



Select the item and press OK. You will then see the citation in your Word document.

If you realise you need to change the item cited, you can click on the citation and select **Zotero > Add/Edit Citation** again. This will bring up the window above again, allowing you to select another item to replace the existing citation.

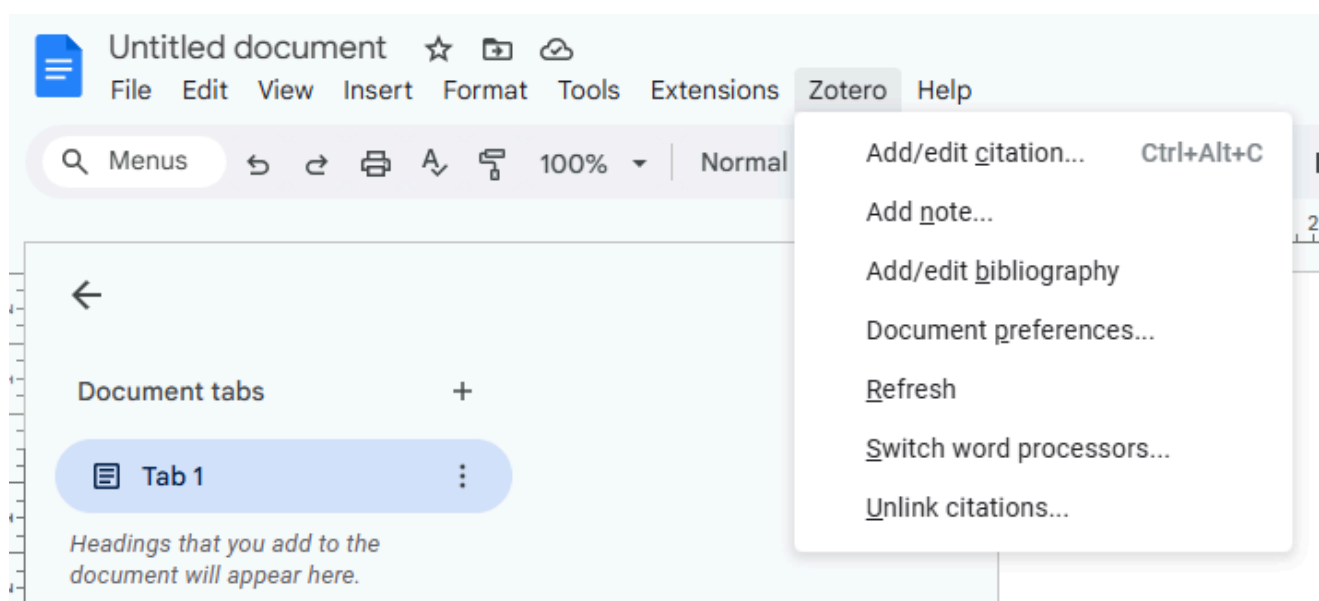
When you would like to produce a bibliography of all the items cited in your Word document, put your cursor where you would like the bibliography to begin and select **Zotero > Add/Edit Bibliography**. You will then see a bibliography, containing full entries for everything cited in your document.



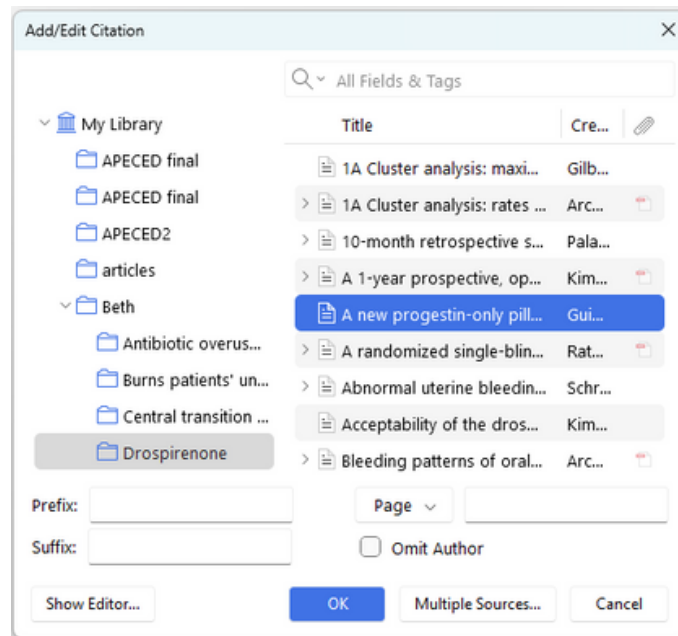
If you realise you need to go back and insert a new citation, the bibliography will automatically update as you go.

Using Zotero in Google Docs

Zotero should automatically install its add-ons in Google Docs when you download it. To check this has happened, open up a new Google Doc and check that Zotero appears as an option in the ribbon.



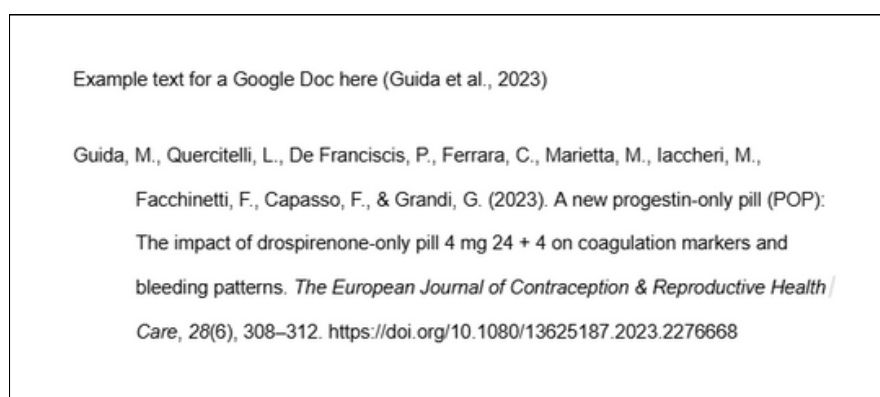
When you are writing and you wish to add a citation, make sure Zotero is open on your computer and then select **Zotero > Add/Edit Citation** in Google Docs. It may ask you to give permission for Zotero to access Google Docs and then to select a citation style; choose your preferred style and click OK. In the next window, you can then select the item you would like to cite, as can be seen below:



Select the item and press OK. You will then see the citation in your Google Doc.

If you realise you need to change the item cited, you can click on the citation and select **Edit with Zotero**. This will bring up the window above again, allowing you to select another item to replace the existing citation.

When you would like to produce a bibliography of all the items cited in your Word document, put your cursor where you would like the bibliography to begin and select **Zotero > Add/Edit Bibliography**. You will then see a bibliography, containing full entries for everything cited in your document.



If you realise you need to go back and insert a new citation, the bibliography will automatically update as you go.