



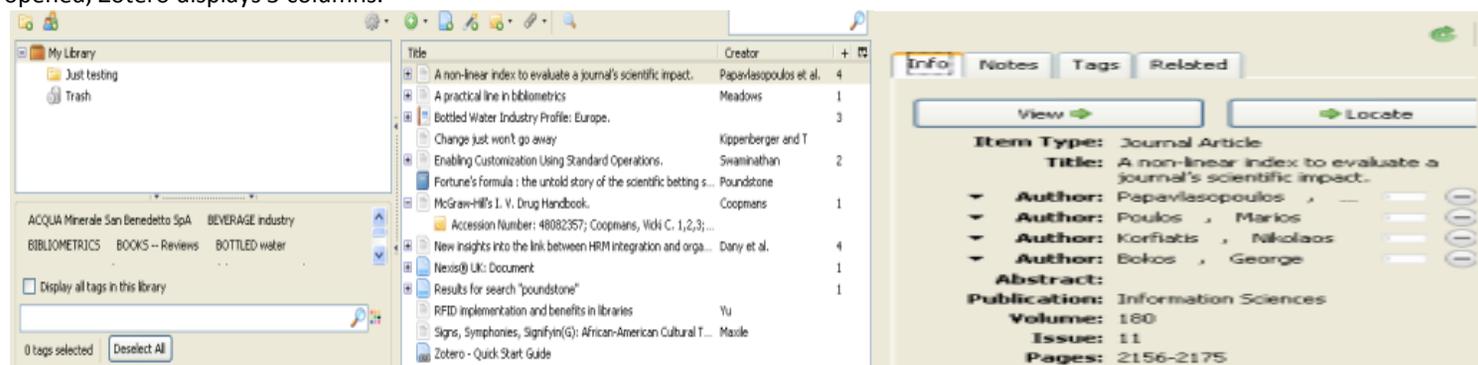
What is Zotero?

Zotero is a free reference management software available for the Firefox Internet browser. Zotero is at the most basic level, a citation manager. It is designed to store, manage, and cite bibliographic references, such as books and articles.

Once installed, Zotero can be accessed by clicking the Zotero icon on the bottom right corner of the browser window, clicking the Zotero icon in the Firefox toolbar or going to 'Tools' heading on the menu toolbar.

In Zotero, each of the **references** you enter constitutes an **item**. Each item contains data ("Metadata") about the reference. When opened, Zotero displays 3 columns.

Free download at:
<http://www.zotero.org>
(click the download button and follow the instructions)



The **first column** is the **organisation column**. It displays the location of all items (references).

(Note: Initially all items you capture are organised under "My Library", but you can create new folders to store and organise your captured references)

Items themselves appear in the **second column**.

Tags are words or phrases used to describe items. You add or remove them using the tag selector at the bottom of the 1st column, or the tags tab of any item in the 3rd column. Tags are also added automatically if present on a captured reference.

The **third column** displays the **details** (metadata) of your **captured references**.

- The **info** tab displays the bibliographic data
 - The **notes** tab allows you to add notes to your items
 - The **tags** tab allows you to assign tags to your items
 - The **related** tab allows you to define relationships between items (references)
- The **view** button allows you to view the webpage or associated document, the **locate** button opens the folder in which the document resides.

Collecting references: capturing item information

There are several ways to capture or create an item, depending upon the item type. Because Zotero runs within Firefox, it is simple to create new items from information available on the internet.

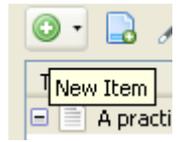
If a capture icon like or appears in the address bar, Zotero can automatically create an item of the appropriate type and populate the metadata fields (3rd column). If a full-text PDF is available, it will be automatically attached to the item.



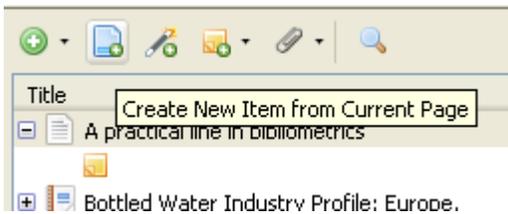
The capture icon will appear if there is a translator written for that particular website or resource. There are translators available for some DBS-subscribed electronic resources (e.g. EBSCO, Emerald, JSTOR), but not necessarily all of them. On the Zotero website there is a list of sites compatible with Zotero. However, websites often change their design and layout and you may find that some sites don't actually work properly. On the other hand, many, many sites not listed will also work with Zotero. Think of the list as a constant work in progress

You can also capture multiple records simultaneously via the folder icon which appears on a search results page. Clicking this will provide the option of saving a selection, or all results on that page.

Collecting references: creating items



To manually create a new item, click the New Item button in the Zotero toolbar, then selecting the appropriate item type. Metadata (data about the item) can then be added by hand in the third column. Apart from the versatility this provides, it is important for adding primary documents.



To create a web page item, on the Zotero menu bar, click the 'Create New Item from Current Page' button. This saves the page itself as an item, not any bibliographic sources on the page. As well as an item, a snapshot of the web page itself is saved.

Note that Zotero only saves the information available on the web page, hence for example, if there is no author listed, you will have to enter the name manually.

Zotero can add items automatically using ISBN number, Digital Object Identifier (DOI) or PubMed ID. This is done by clicking the Add Item by Identifier button in the Zotero toolbar, typing in the ID number and clicking OK.



Note: Some electronic resources have built-in reference management functionality. For instance in the bibliographic record of an EBSCOHost database item, there will be a 'Cite' icon.



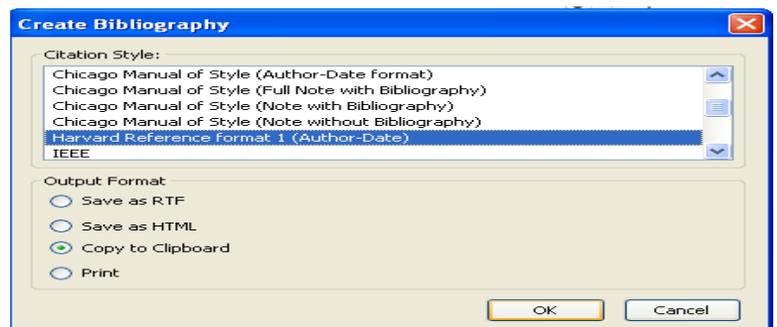
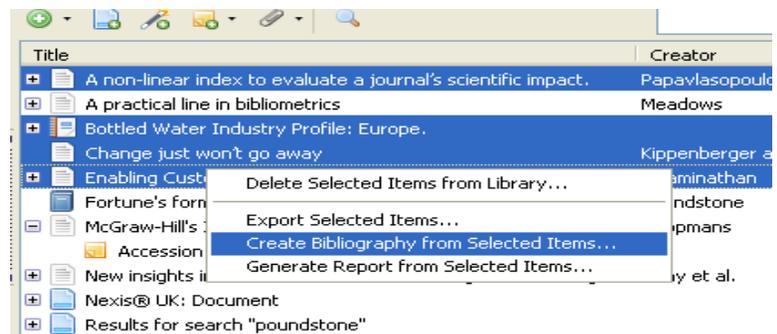
Clicking this icon will allow you to export the record to Zotero (select 'Direct Export' to Reference Manager and the item will be saved in Zotero)

Creating bibliographies

Creating bibliographies is very simple. There are three ways to do this: Quick Copy, Right Clicking and using the word-processor plug-in.

1. **Quick Copy:** simply select items in the second column and drag and drop into any text field. Zotero will then create a numbered and alphabetically ordered bibliography. You can configure your Quick Copy preferences with the 'Actions' menu  under 'Preferences'

2. **Right Click:** select the item(s) that you want to cite. Select the citation style that you want to use and choose the **Copy to Clipboard** option from the dialogue box.



Switch to your document and paste. Your selected items now appear as a properly formatted list of references :

2008. *Bottled Water Industry Profile: Europe.* Datamonitor Plc. Available at: <http://search.ebscohost.com/login.aspx?direct=true&db=bth&AN=35416488&site=bsi-live>.

Kippenberger & T. 2000. Change just won't go away. *The Antidote*, 5(7), 4 - 5.

Papavlasopoulos, S. et al., 2010. A non-linear index to evaluate a journal's scientific impact. *Information Sciences*, 180(11), 2156-2175.

Swaminathan, J.M. 2001. Enabling Customization Using Standard Operations. *California Management Review*, 43(3), 125-135.

Word processing integration

There are plug-ins available with Zotero for Microsoft Word and OpenOffice/NeoOffice.

With the plug-in installed, you can insert a new in-text citation in your document, and your reference list will be automatically updated to include the newly cited item. Also, you can correct the title of an item in your Zotero library and with a click of a button the change will be incorporated in your texts.

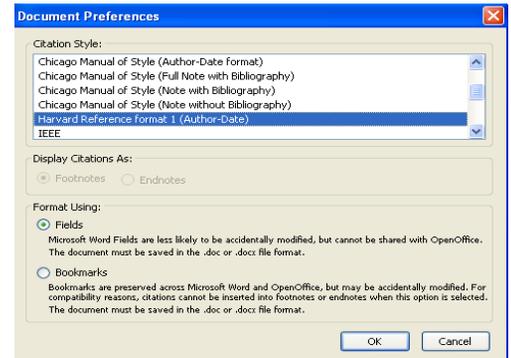
The plug-ins are available as Firefox extensions and so are installed in the same fashion as Zotero itself.

After installation of the plug-in you should see a row of icons in your Microsoft Word toolbar

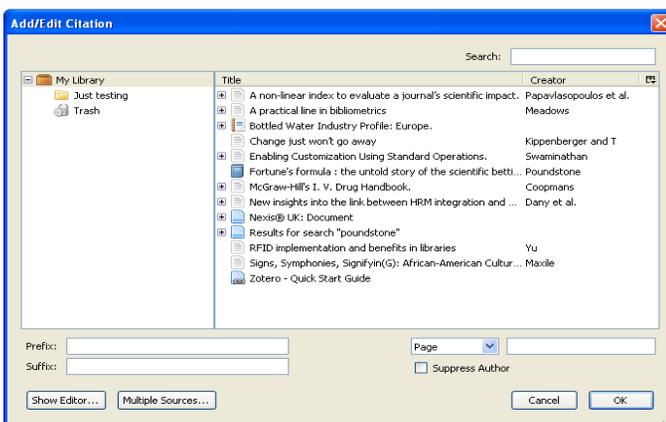


These icons will allow you to manage references in your Microsoft Word documents. If you do not see them, try checking the 'Add-ins' tab.

When you want to cite something from your collection, click the first button, 'Zotero Insert Citation'  if this is the first citation you have added to the document the Document Preferences window will open. Chose the bibliographic format you would like to use from the list and click OK.



Once you have chosen a format, the 'Add Citation' window will appear. Go through your collection in this window and select the item you would like to cite. You can add the specific page number in the text box at the bottom of the window



By clicking on  you can preview and edit the citation before it is placed into the body of your text.

When you click "OK," you should now see a properly formatted citation in your document.

The 'Edit citation'  and 'Edit bibliography'  buttons allow you to edit citations and bibliographies you have already inserted into your documents. Click inside a citation or bibliography and click either button to edit.

The fifth button, 'Zotero Refresh'  updates your references to any changes in your Zotero collection. The sixth button 'Preferences'  will open the Document Preferences window again, allowing you to change your bibliographic style on the fly. The seventh button 'Remove Field Codes'  will remove all background formatting from your citations (chances are you won't notice anything happening), but the end result is that all citations are saved as plain text.

TIP: Create your Zotero account for free!

If you register (free) for a Zotero account, you can also create groups. Shared group libraries make it possible to collaboratively manage research sources and materials i.e. you and your friends can share references. Creating an account also means you can store your items online rather than on your PC, so you can access them from any PC (with Zotero installed on Firefox) anywhere.

TIP: Import references directly from the Library online catalogue!

On a search results page on the library catalogue, or an individual catalogue record page, there is a "Results" box on the right hand side of the screen, below the login box. Select 'download'

In the format field, select '**Endnote format (.txt file)**' or '**Reference Manager format (.txt file)**' and click OK.

The saved file is displayed in your web browser (Firefox). Select 'File' and 'Save Page As': select 'File type' – 'All Files' (If you are using Internet Explorer, a File Download box will open. Select Save)

- If you have chosen **Endnote format**, remove 'zip' at the end of the file name and type '**ris**' (so instead of **blah.zip**, your file is named **blah.ris**)

- If you have chosen **Reference Manager format** remove 'zip' at the end of the file name and type '**rdf**' (so instead of **blah.zip** your file is named  **blah.rdf**)

NB: Ensure you know where your saving your files.

Invoke Zotero in Firefox and click on the cog

Select 'import' and then 'files' of type RDF for Reference Manager format or RIS for Endnote format.

Zotero will import the saved list into a folder in your Zotero library.