Introducing Zotero

Introduction

Zotero allows you to store and organize your research sources (300MB of free storage) as well as creating in-text citations and bibliographies/reference lists in Word. It can save a lot of time when completing larger research projects but it **is not a magic solution** to referencing issues, it is only as good as the data it receives - you must still **check your references** to ensure accuracy.

The **software is not supported by the University of Portsmouth** but your Faculty Librarian may be able to help with some of the basics. The Zotero Support webpages provide information about everything you need to know to use the application well, in many different languages. You can contact Zotero's support team if you experience any difficulties. This guide aims to introduce and link you to guidance on the most common things that researchers ask us about.

Installing Zotero

On your own device

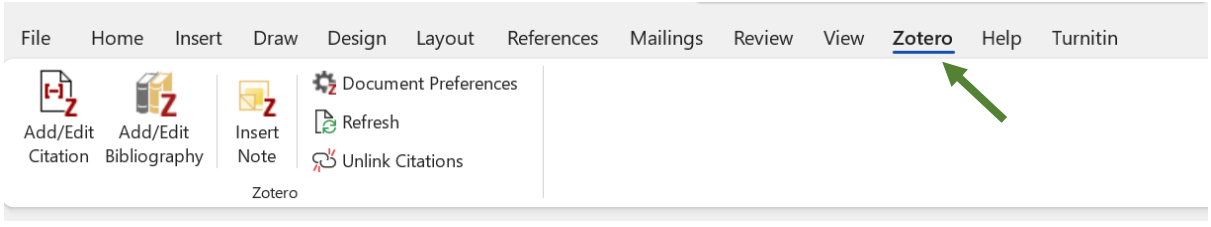
Visit Zotero's Installation Instructions webpage for guidance on how to download and install the **Zotero App** for **Mac, Windows, Linux or Chromebook**. It is best to close down all other applications whilst the set up takes place.

On a University device

Go to **Apps Anywhere** to launch Zotero. You will be taken to a Welcome page offering you a link to **Install a Zotero Connector**.

Install the **Zotero Connector** to easily add content as you are browsing the web. **Pin the connector** (extension) **to your web browser toolbar**.

The Word Processor Plugin for citing, referencing and **easy generation of bibliographies**/ reference lists, should install automatically when you reopen Word. It will appear on your Word toolbar. You may need to restart Zotero and then open Word. You can also use Zotero with Google Docs.



Zotero is a web-based tool and once you have registered **you can access a web-version of your Library** by logging in from anywhere. Next time you visit the App (on the device on which you installed the software) you can sync your libraries – look out for the circular arrow icon.

Adding resources to your Zotero Library

There are lots of ways to add resources to your Zotero Library. These are explained on the Zotero support pages. They include:

- Using the **Zotero Connector** which allows you to save items as you find them from Library databases, catalogues or the web. It is usually best to save the information from the page where you can see the abstract or the metadata of the journal/book. It is possible to save items from the PDF page, but the data for the reference isn't always transferred.

- You can **add PDFs** that you have saved elsewhere simply by **dragging and dropping** them into the Library. It will attempt to detect the metadata for your references automatically.

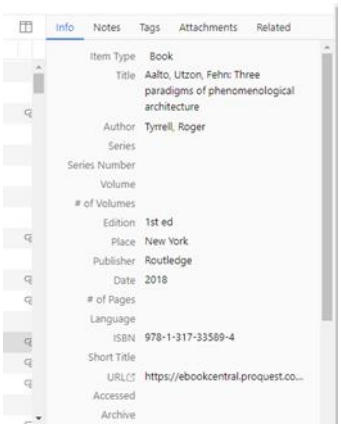
  Note: *With storage space limited to 300MB (Mendeley and Endnote have 2GB) consider whether you need to store the PDF on Zotero. Often you can link to the full text from the library resource where you found it. Alternatively, you can install ZotFile, a third-party plugin, which allows you to link to the PDFs stored elsewhere.*

- The magic wand icon allows you to search for items by **ISBN, DOI** and other identifiers quickly add items that you might have found already.

- And if you simply want to **add the details manually** for an item that you have discovered, there are lots of templates included under the plus sign, from Artwork to TV Broadcast.

- If you have **already created an extensive library on another Reference Management software**, such as Mendeley or Endnote, you can find instructions for moving it to Zotero.

It is **important to check the details of the item you are saving in your Zotero Library** to make sure that it has all of the correct information for you to cite the resource correctly. This sometimes means adding in extra details or removing capital letters from parts of the title. Select the title you want to edit by clicking on it so the details appear in the right-hand panel. **Making these changes as you go along will save you time, in the long run, and your reference list will be perfect!**



Organizing your Zotero Library and sharing collections

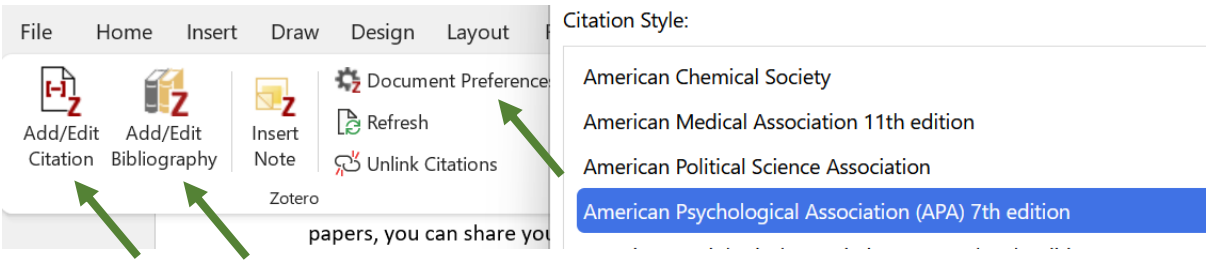
Organize your Library into **Collections and Sub Collections.** The same item can be saved to multiple sub/collections, rather like a music playlist. Click on the **My Library** icon and then the **folder icon** or **+ symbol** (Web Library) to set up your collections. You can also **tag** (keyword) your documents and colour code them. Find out more from the Zotero support pages: Collections and Tags.

You can add Notes to resources in your Library.

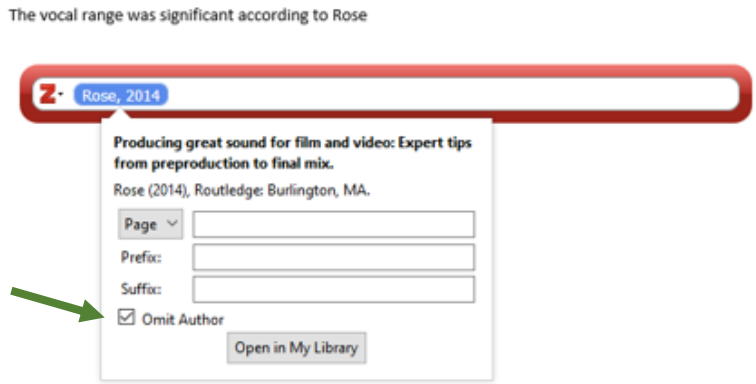
Your collections can be shared with others, by setting up Groups and, if you publish your own papers, you can share your bibliography via My Publications.

Using the Word Processor Plugin

When you have installed the plugin (if it hasn't loaded automatically), open the Zotero tab on the Word toolbar to see this menu. Choose **Document Preferences** to choose your referencing style.



When you want to **insert a citation** into your document, select **Add/Edit Citation** and then search your Zotero Library for the document/book you want to cite. The author and date, within brackets, are automatically added. If you wish to include the author as part of the sentence and only the date in brackets, you can manually type in the author's name and then click on the citation to open up some options including tick the box to **Suppress Author** or add in a **Page number**.

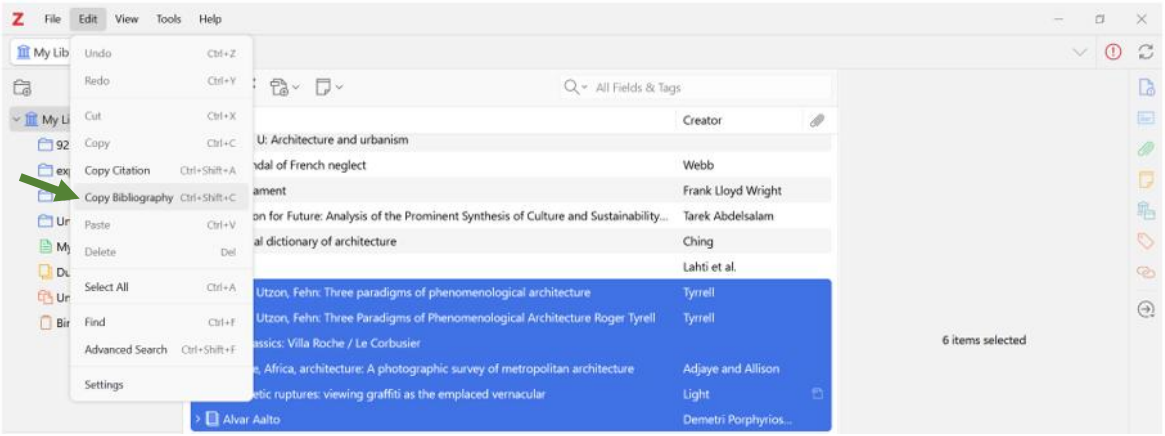


When you want to see your **Bibliography/Reference List**, select the **Add/Edit Bibliography** option and it will appear below where you are typing.

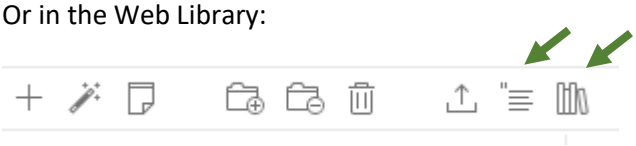
Note. *If your citations or references need correcting, make the corrections in your Zotero Library so that they are permanent. Then refresh your Word document.*

Quick in-text citation and reference list/bibliography from Zotero Library

Select the items you want to see in your reference list, by holding down ctrl and clicking the left mouse button and then select **Copy Bibliography** from the **Edit menu**. From the Web Library, choose the **Create Citations** or **Create Bibliography icon**. Paste it into your Word document.

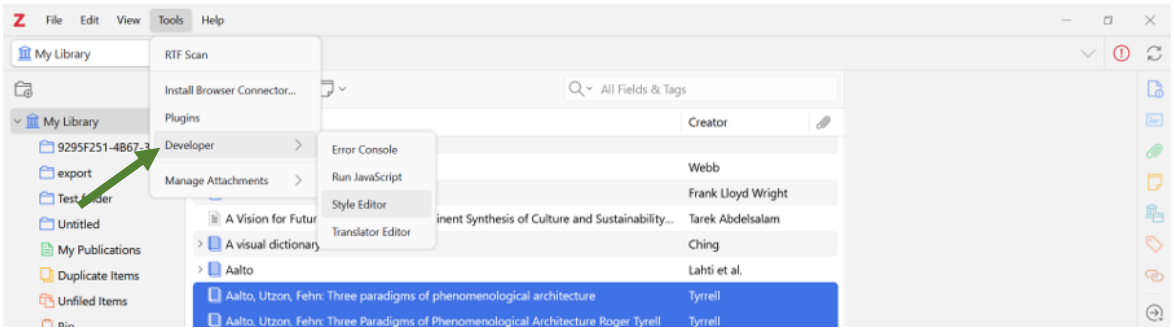


Or in the Web Library:



Copy Citation, enables you to paste the author and date within the text of your document. Handy when you have multiple authors!

You can also **check how references and citations look** by highlighting the resources you want to check and selecting **Developer** then **Style Editor** from the **Tools menu**.



Referencing Help and Support

Visit the University of Portsmouth's Library referencing guidance
General referencing queries can be directed to the Library's 24/7 help service.