Zotero

User manual

(Word and Google Docs)

Contents

Documentation (user manuals) from Zotero.org: How to…

- Download and install Zotero: www.zotero.org/
- Using Zotero with **Word**: www.zotero.org/support/word_processor_plugin_usage
- Using Zotero with **Google Docs**: www.zotero.org/support/google_docs
- Using Zotero with **LibreOffice**: www.zotero.org/support/libreoffice_writer_plugin_usage

More help (In Norwegian):

- At innsida: i.ntnu.no/wiki/-/wiki/Norsk/Bruke+Zotero
- At NTNU UB Medicine and health library: www.ntnu.no/blogger/ub-mh/endnote-referanseverktoy/zotero/

Download and install Zotero: www.zotero.org

A good "Beginner's guide-video":

- https://www.youtube.com/watch?v=JG7Uq_JFDzE (12 min 41 sec)
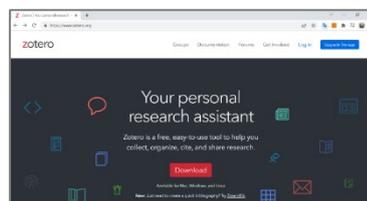
Zotero works with Chrome, Safari, Firefox, Opera and Microsoft Edge

Download both of the following programs:

- **Zotero 5.0** is the program where your references are stored
- The **Zotero Connector** is a plugin for your browser, that makes it super easy to save references to your Zotero library.

The Zotero interface

Make **folders** for different projects

List of references in that project

Showing field-information of the chosen reference

How to add references to your Zotero-library?

Four main ways to add references to Zotero:

1. **Manually** add references
2. Add references with an **identifier**
3. Use the **Zotero Connector**
4. Add references by **drag and drop PDF-files** into your library
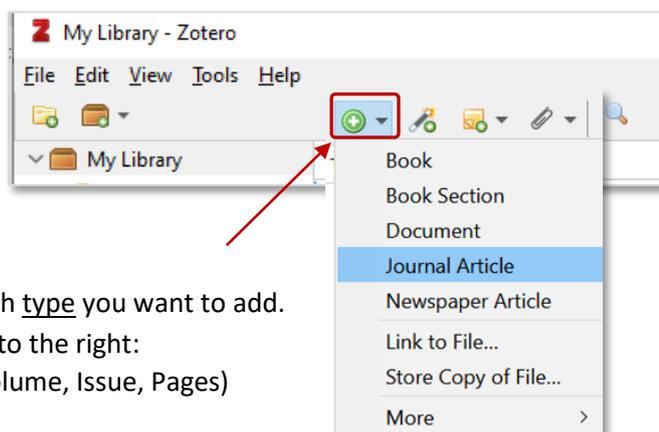
1. Manually add references

- Click the **New Item** icon, choose which type you want to add.
- Then manually fill in the information to the right:
  (Title, Author, Year, Journal name, Volume, Issue, Pages)

2. Add references with an identifier (PMID, DOI, ISBN, arXiv IDs)
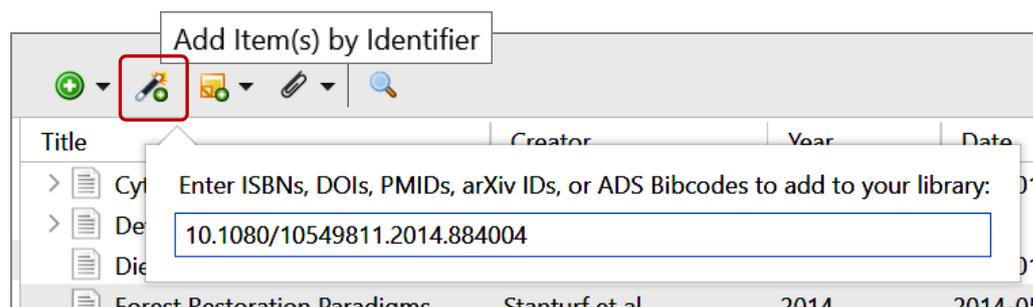
Add ISBN, DOI, PMID, arXiv number in the field shown above.

A sample of ID-numbers on an article found in PubMed:

> Eur J Clin Invest. 2021 Nov;51(11):e13678. doi: 10.1111/eci.13678. Epub 2021 Sep 26.

COVID-19 vaccination in children and university students

John P A Ioannidis [1] [2]

Affiliations + expand

PMID: 34529274   PMCID: PMC8646734   DOI: 10.1111/eci.13678

Free PMC article

PMID = PubMed ID, **DOI** = Digital Object Identifier
PMCID = PubMed Central ID (is an archive of full-text journal articles) (Does **not** work as an identifier)

3. Use the browser extension (the Zotero Connector) to export from databases

After a search in an academic database, click the "**Save to Zotero**" extension in your browser. Then choose which references you want do export to Zotero and click **OK**.
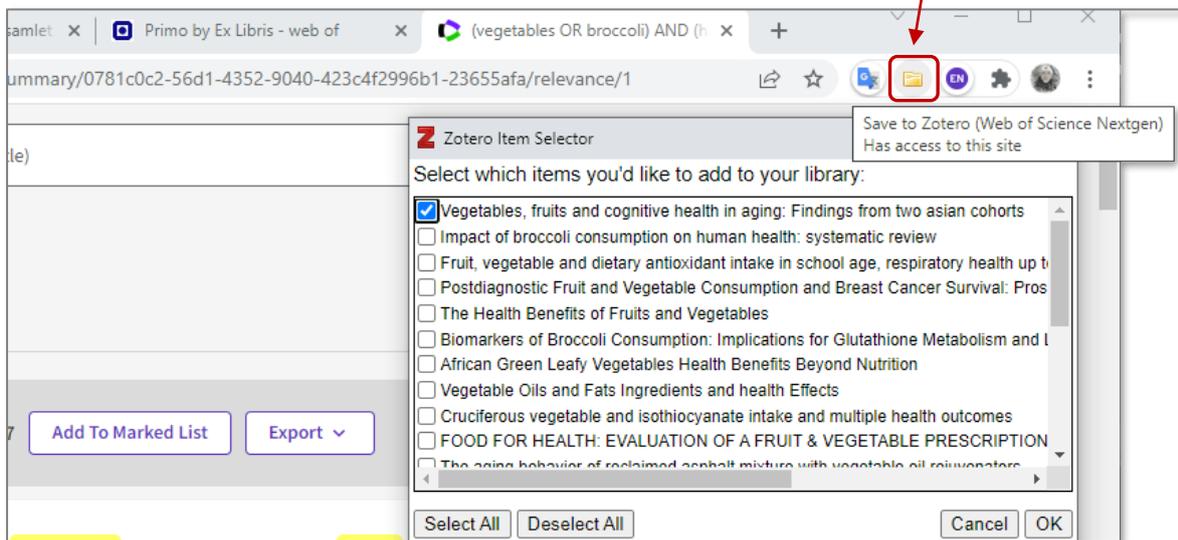
4. Drag and drop PDF-files of journal articles into Zotero

If you have a lot of journal articles (as pdf-files) downloaded to your computer, then just **mark them**, and **drag and drop** them in the main window of Zotero (see below). Zotero will automatically fill out the fields for us (add them for us).

This will usually only work for journal articles. Always check the reference afterwards.
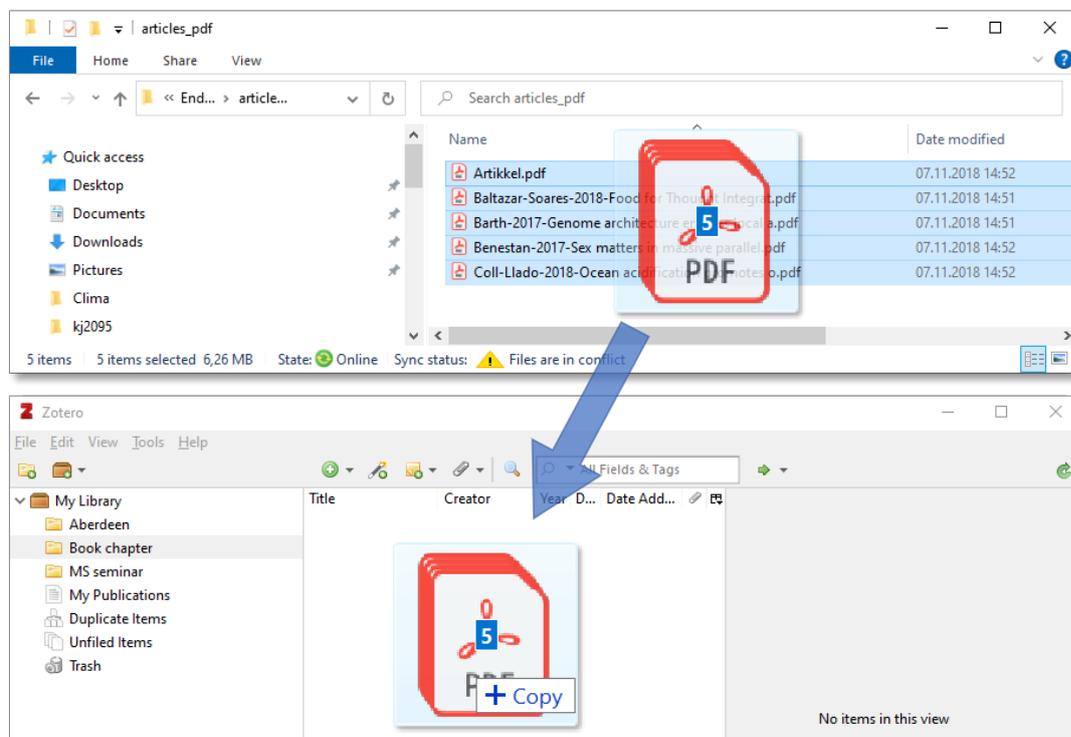
Organize and maintain your library

Add Tags and Notes to your references to improve organization and retrieval

The Tags will be visible on the lower left side and are searchable in your library. There may be some automatic tags added as well. (These can be removed in the Tags-window by select the action button and click on the delete automatic tags in this library).

You can also add Notes and choose to link references together
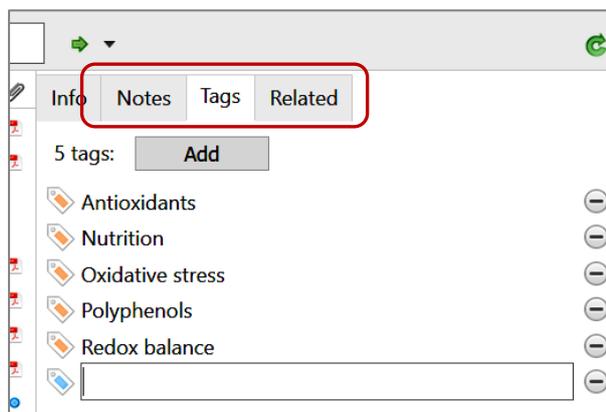
Create folders to organize references for different projects

Right click **My Library > New Collection…** to add folders for your references in different projects. Here, I have added two projects: MS seminar and Aberdeen. Stay in the folder where you want to
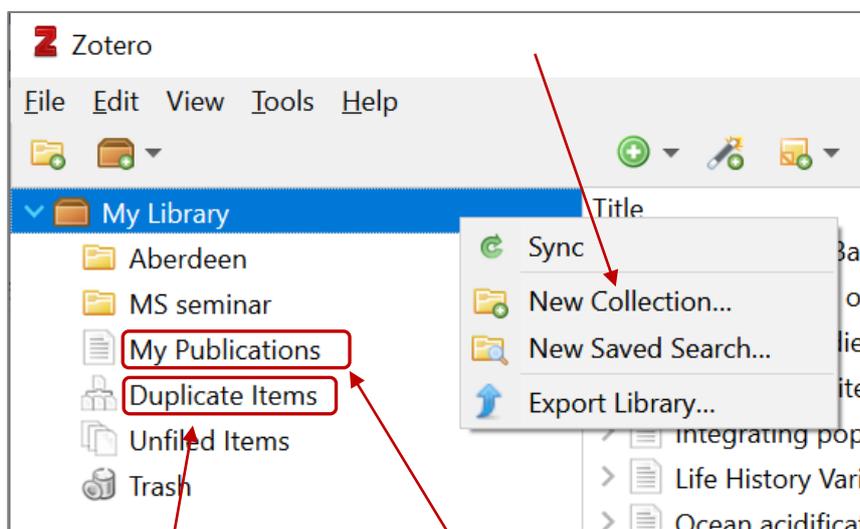
add the new references (or drag and drop from My Library). My Library will contain all references in all folders.

My Publications

Is a section (folder) where you can add your own publications to your own Zotero profile page.

Avoid duplicates

If you have duplicates among your references, you can find them in the folder **Duplicate Items**. On the right side you can choose which you prefer to keep (preferable one with much information) and then click **Merge**.

Create a free Zotero online account and Set up Syncing

Edit > Preferences:
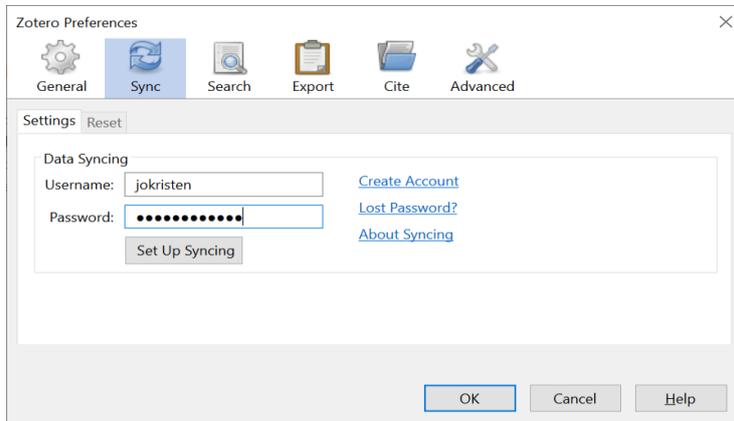
The online account will sync with your computer and will also work as a backup.
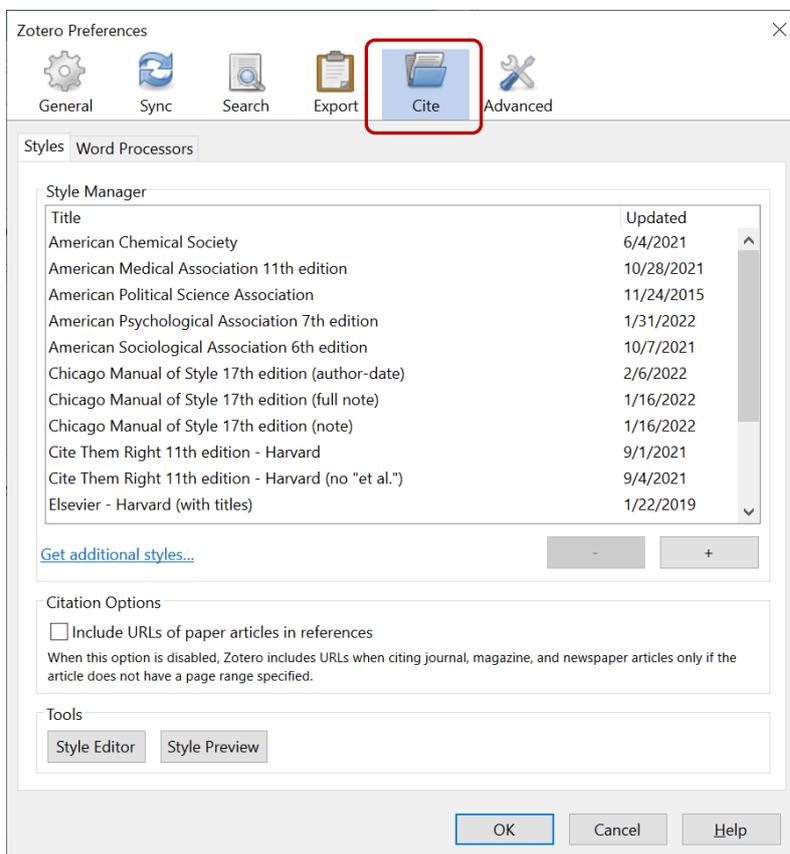
The Cite tab shows styles you can choose from. You can also add more styles by choose **Get additional styles...**

Zotero with Word

You might get messages about **errors** if you have both Zotero and Mendeley installed at the same time.
For me this window popped up each time I started up Word.

(Despite this, you could ignore it, because Zotero worked fine anyway).
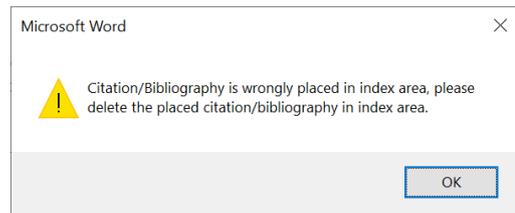
The Zotero tab:
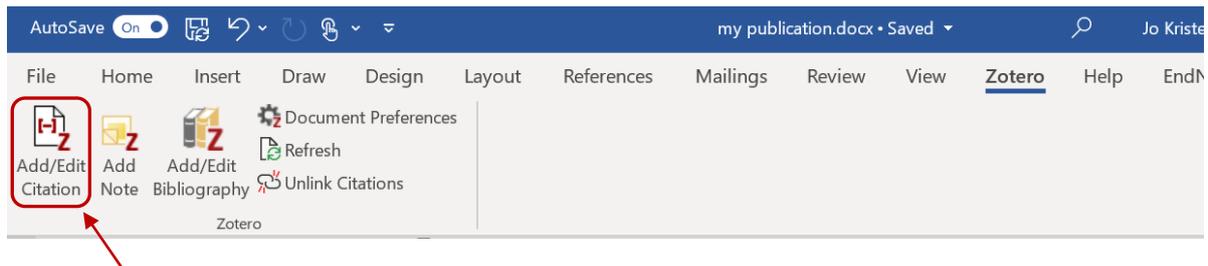
Add an in-text citation: Click **Add/Edit Citation** and the following text-field will pop up.

The **first time** you do this in your document, you will be asked to choose style first. The style can be changed at any time later.

Now you can start type Author-name or parts of the title in the field to find a reference – or, click the **Z > Classic View** to get a window (shown under) with all references in your Zotero Library. Choose one (or more) to use them in your text (Click OK).
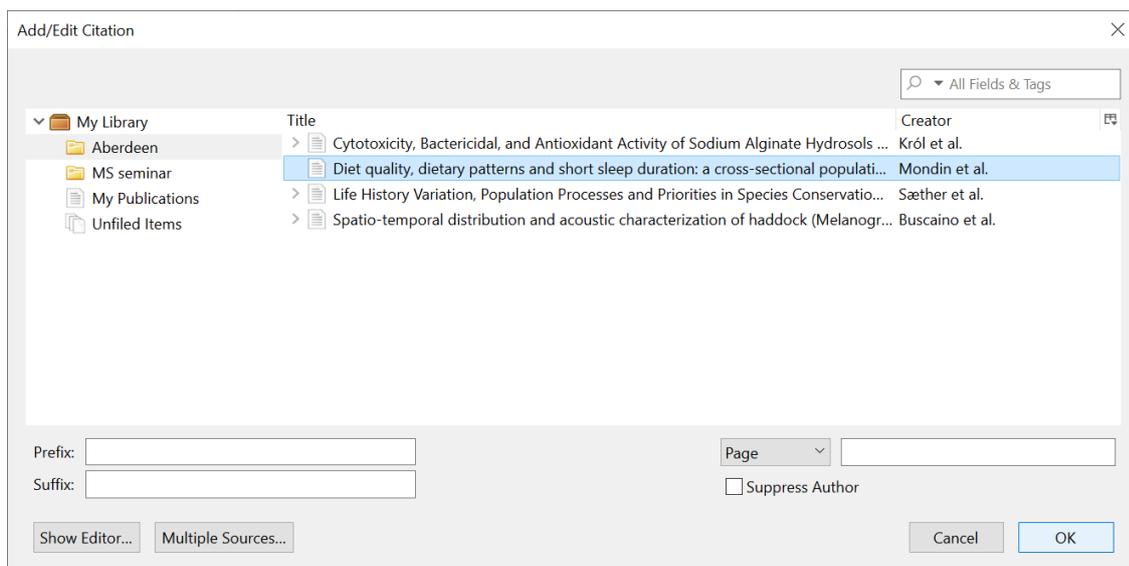
Add Bibliography (The reference list)

There are two ways to add the reference list to your document:

1. **(Copy and paste from Zotero)**
   In Zotero:
   Stay in the folder/collection where you have the references used in your document. Right click and choose **Create Bibliography from Collection…** In the window that pop up, choose the style you want for your Bibliography and click **Copy to Clipboard**.

   Then paste it into your document, either it is a Word-, LateX-, Google Docs or any txt-document you are using.

   Or

2. **In Word**:
   Add in cite references by choosing **Add/Edit Bibliography**.
   Remember, the Reference list will be added exact where the mouse cursor is standing (when you add it).

   Click **Document Preferences** to change style. In the window that pop up you can also choose to update automatically when you add new or delete citations to the text.

If you discover some typos/errors in your references after import to Zotero:

If you see some typos or other small bugs or things in the reference list, **go to Zotero and fix the error there**. Then they will be updated in your document as well. (If nothing happens, click **Refresh**.)
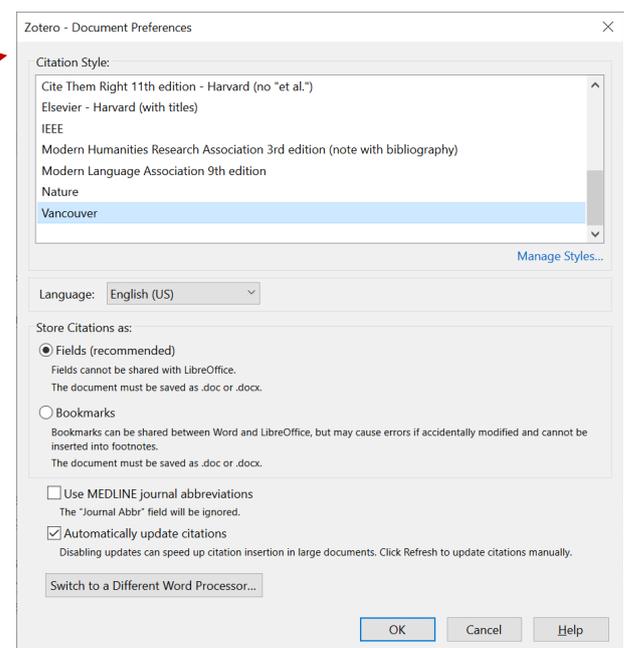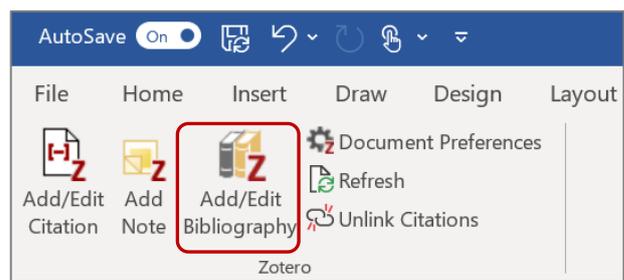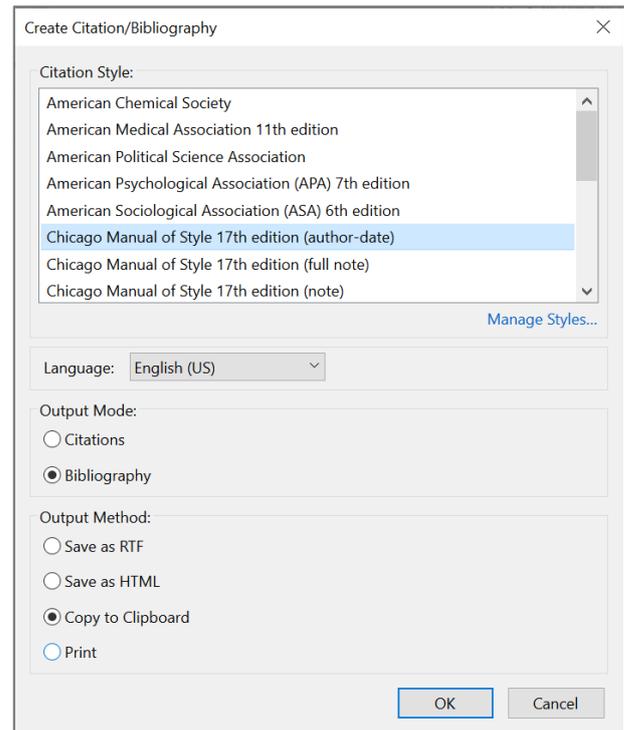
Edit an in-cite citation

If you want to remove the author, or edit information about page, chapter, figure,… etc. do as follows:

Mark or put the cursor on the citation you want to edit. Then click **Add/Edit Citation** and the red field will show the marked citation. Click on that citation to edit.
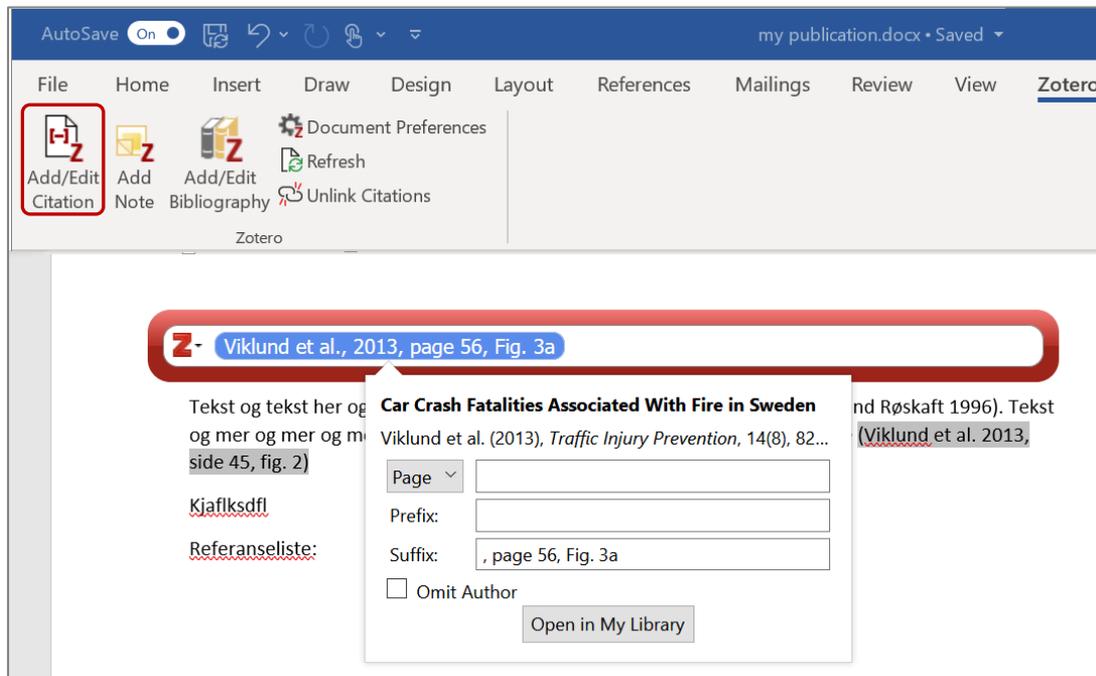
Zotero with Google documents

- More help at Zotero.org:
  How to use Zotero with Google Docs: https://www.zotero.org/support/google_docs

In the Zotero menu, you'll find the following options:

Add/Edit Citation	Add a new citation or edit an existing citation in your document at the cursor location.
Add/Edit Bibliography	Insert a bibliography at the cursor location or edit an existing bibliography.
Preferences	Open the Document Preferences window, e.g. to change the citation style.
Refresh	Refresh all citations and the bibliography, updating any item metadata that has changed in your Zotero library.
Unlink Citations	Unlink Zotero citations in the document by removing the field codes. This prevents any further automatic updates of the citations and bibliographies. Note that removing field codes is **irreversible** and should usually only be done in a final copy of your document.

Zotero works with Google Docs as well, and you will find all the same choices in the menu.

1. Add/edit citation... to add a citation
2. Add/edit bibliography to add a reference list (Bibliography)
3. Click Document preferences if you want to change style and more...
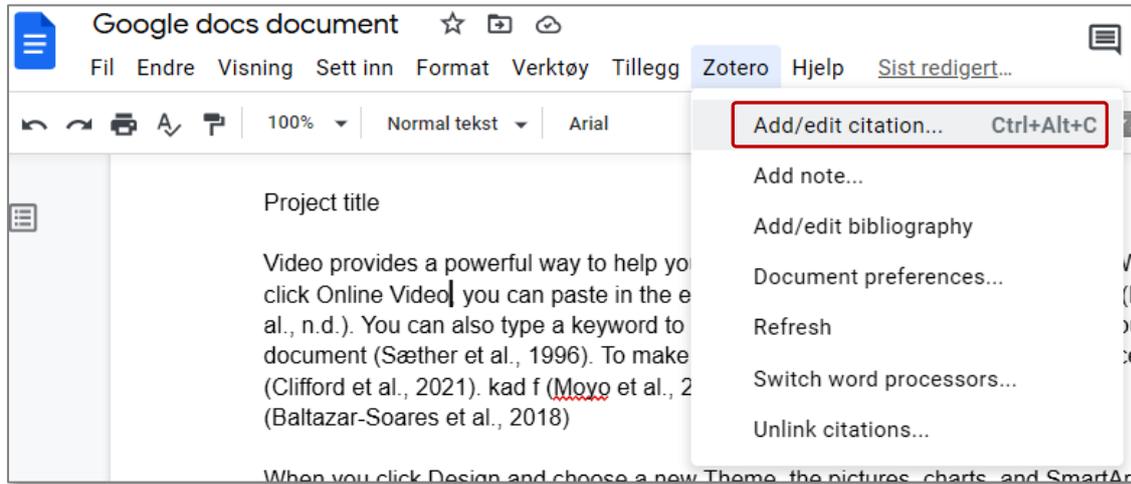
How to share your Zotero collection?

In order to create groups and share references, you must first have a Zotero account, and have data syncing enabled

Click the **New Library** icon (next to the **New Collection** icon) and select **New Group.**
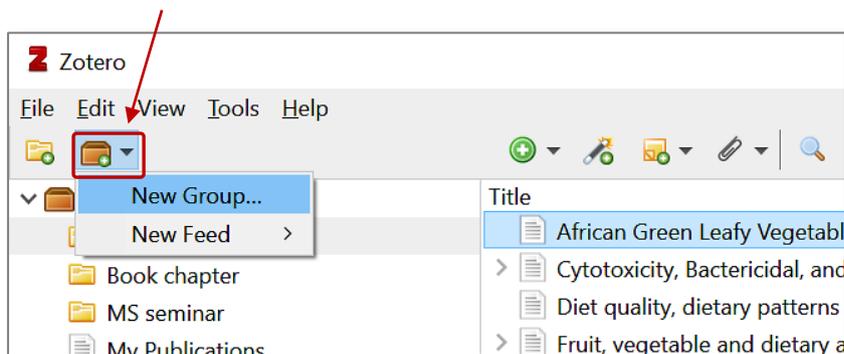
Log into your **Zotero account**.

Add a Group Name, choose Member settings and add members:

https://www.zotero.org/groups/new/

Home **Web Library** **Groups** **Documentation** **Forums** **Get Involved**

Search for groups | Search |

Home > Groups > New group

Create a New Group

Search for Groups · Create a New Group

Group Name

Choose a name for your group

Aberdeen Conference

Group URL: https://www.zotero.org/groups/aberdeen_conference

Group Type

Public, Open Membership	**Public, Closed Membership**	**Private Membership**
Anyone can view your group online and join the group instantly.	Anyone can view your group online, but members must apply or be invited.	Only members can view your group online and must be invited to join.
● **Choose a Public, Open Membership**	○ **Choose Public, Closed Membership**	○ **Choose Private Membership**

Create Group

Z My Library | Zotero   Z Zotero | Groups > Aberdeen_Con   +

https://www.zotero.org/groups/4596287/settings/library

Welcome, **jokristen** · **Settings** · **Inbox** · **Download** · **Log Out**

zotero

Upgrade Storage

Home **Web Library** **Groups** **Documentation** **Forums** **Get Involved**

| Search |

Home > Groups > Aberdeen_Conference > Settings

Aberdeen_Conference Settings

Group Settings · Members Settings · Library Settings

Group Type

○ Private

● Public Closed

○ Public Open
Controls who can see and join your group

Library Reading

○ Anyone on the internet

● Any group member
Who can see items in this group's library?

Library Editing

● Any group members

○ Only group admins
Who can add, edit, and remove items from this group's library?

File Editing

● Any group members

○ Only group admins

○ No group file storage
Who can work with files stored in the group? Public Open groups cannot have file storage enabled.

Save Settings

The group will appear in the left pane of your Zotero **online** account.

Click **Manage Members** to share your library with other people.
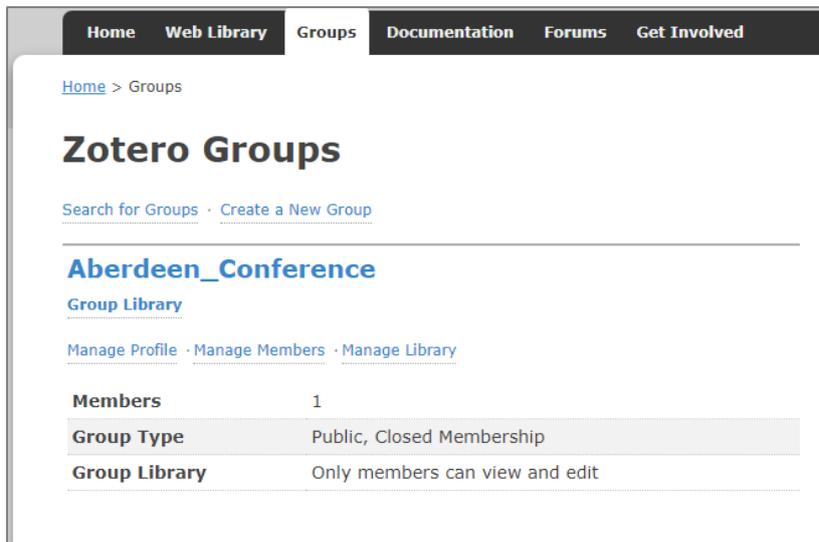
Drag and drop files into the group folder

Items can be viewed or edited by other group members, if their permissions allow it

You can also interact with your groups through the Groups tab on the Zotero website