Wolfson Academic Tools

Zotero

Zotero is open-source reference management software. It stores the bibliographic details of resources (title, author, publisher etc.) as well as documents and notes. In addition, it works with Word to generate in-text references and automatically create a bibliography. It will save you time and anxiety, allowing you to focus on the content of your work.

Setting up

Go to www.zotero.org/

Download the browser extension. This adds an icon to your toolbar to help you download bibliographic information into Zotero. This icon is responsive, so it looks different depending on whether you are viewing information for a book, journal article, newspaper, letter or film. A folder will appear if there are multiple items available e.g. a set of search results. It works on catalogues and databases, extracting book and journal information, as well as a range of webpages, news sites and video streaming services.

Second, download the desktop version of Zotero. This programme will store references and notes plus links to pdfs and Word documents. It is called your ‘Library’. By registering for a Zotero account you will be able to access your Library from any device, wherever you are.

Getting references into Zotero

The most effective way is to download references using the icon in the toolbar, but you can also drag and drop a pdf into the main column of your Library. This is a good way to start your library if you already have lots of pdfs on your computer.

Some catalogues and databases have their own download function. Save the citation as an RIS file and set your computer to automatically upload it into Zotero: Settings | Default apps | scroll and select) Choose default apps by file type | (scroll to RIS) Choose a default.

If there is no online record of a resource, you can manually add an item to your library. Choose from over 30 resource types in addition to book and journal article, including artwork, book chapter, computer program, email, interview, legal case, patent, thesis and TV broadcast.

Store your own files in you your Library too as a Word document or copy and paste the full text in the notes field. This will help you search and retrieve them more easily.
Organising a record

When you have created a record either automatically or manually, you need to check the details. Using the right-hand column, tidy up the record: check the resource type is correct, spelling, capitalization etc. as this is where Word will source the information from to create in-text references and the bibliography. Check too for missing fields e.g. place of publication.

The tabs at the top of this column allow you to add notes from your reading; tags to help you retrieve the resource if you can’t remember the title; and to indicate related items in your library.

If a pdf is available when you download the reference, it should attach a link to the record. Or you can download it and drag and drop onto the record in the central pane. This only creates a link to the pdf; it isn’t stored in your library so if you reorganise your pdfs, the link will be broken.

Tags are useful for retrieval but can become unwieldy in their own right. Add colour to group tags: right click the tag in bottom left-hand pane.

Notes are already full-text searchable. To make pdfs searchable go to Edit | Preferences | Search. You may need to rebuild the index occasionally.

Organising your library

Change the layout of your Library by adding more columns to help you order it in different ways e.g. by author, date added, item type. Use the icon above the scroll bar for the central pane to edit the column headers.

Unlike email, records will stay in the main ‘My Library’ as well as being possible to add them to collections (folders). You can add an item to multiple folders if it is relevant to multiple themes.

It is easy to unintentionally download a reference more than once. ‘Merge duplicates’ using the menu in the left-hand pane, under your folders.

Create saved searches that automatically fill with relevant materials when you download a resource with a matching search term. Use the magnifying glass image at the top of the central pane. The saved search appears as a folder.

Creating in-text references and bibliographies

Once the plugin is downloaded, there will be a new ‘Zotero’ tab in Word. The simple menu lets you add in-text citations/footnotes/endnotes (depending on the referencing style) and a bibliography. Insert your cursor into the text where you would like the reference or bibliography to appear, select the relevant button on the menu, type in words from the author or title and select the correct reference. To add a page number at that time to an in-text reference or footnote, click on the blue box surrounding the author name in this popup window. To add page numbers retrospectively, double click the reference.

There are 9000 different referencing styles. Change the style you are using at any point during writing or after completion by selecting ‘Document Preferences’. It is initially set when you add you’re a reference into a document for the first time.

It is possible to add additional, information-only footnotes as well as extra items into a bibliography, which are not cited in the text.

If there are any errors in the references, don’t edit them in Word. Instead, correct the entry in Zotero and then select ‘Refresh’ in Word, from the Zotero tab.

To update your bibliography, enter or delete in-text references/footnotes in the main body of your text and select ‘Refresh’; don’t edit the bibliography directly.

Syncing and back up

With an online account, you have automatic back up. If you work offline, remember to sync when next online to ensure that you are working with the most up to date version of your Library.

There is no official app for a mobile version but there are third-party options available on the Zotero site: www.zotero.org/support/mobile

Find us on

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