

# RCN Library and Archive Service

## Zotero: a guide for RCN members

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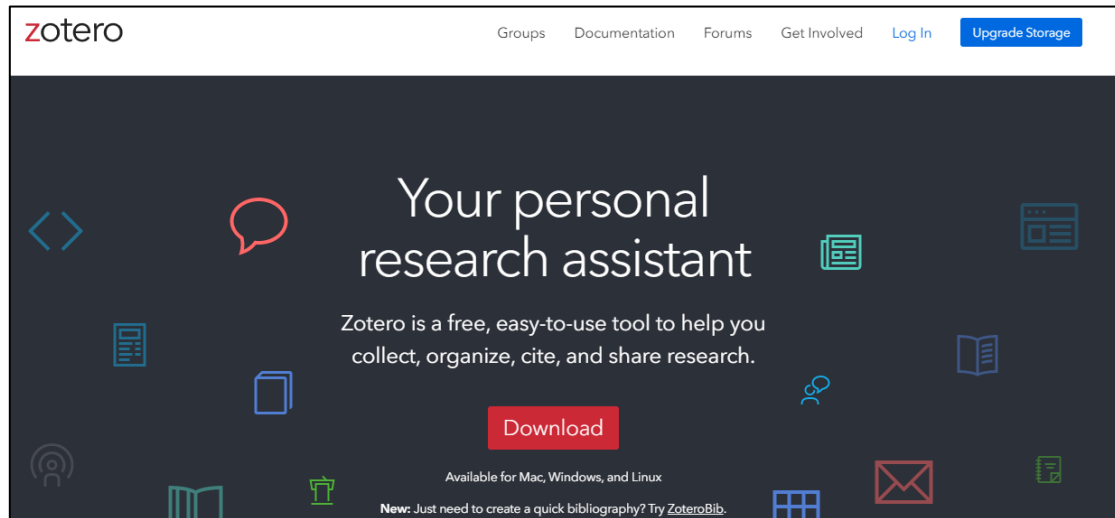
### What is Zotero?

Zotero is a free open source reference management programme that you can download to your computer or laptop. You can use it to collect and organise research and to create reference lists and bibliographies from thousands of citation styles. It is suitable for projects involving a large number of references or where you are collecting references over a long period of time.

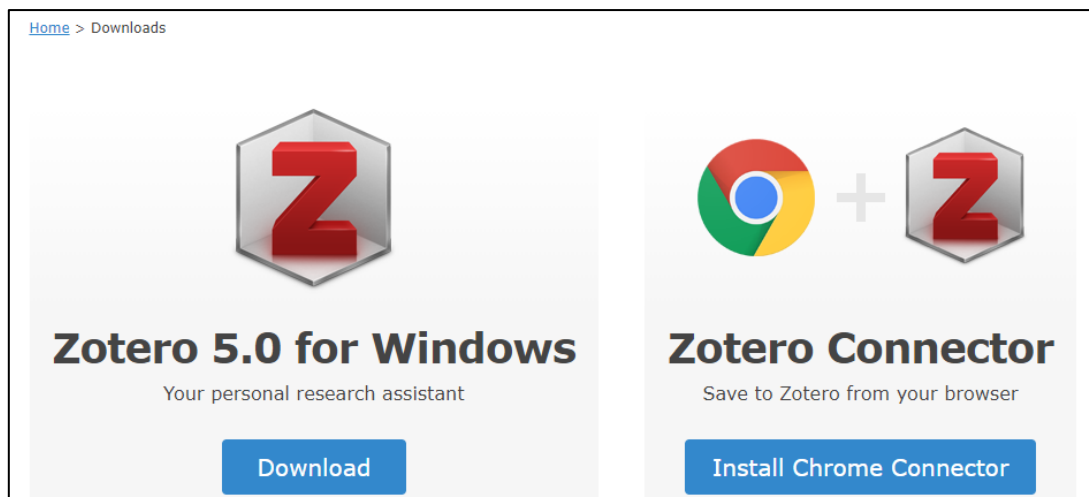
If you need to create a quick reference list for a one-off assignment or piece of work you may find ZoteroBib more suitable. It is a simpler tool which can be used to create reference lists and bibliographies in many citation styles. It is web-based so you won't need to download software. ZoteroBib is available at: <https://zbib.org/>

## Installing Zotero

- Go to [www.zotero.org](http://www.zotero.org)



- Select Download
- Download Zotero
- Install the Zotero Connector. The Connector links your internet browser with Zotero so you can save references whilst you search. Connectors are available for Chrome, Edge, Safari and Firefox.



- You can register for a free web account at: [www.zotero.org/user/register](http://www.zotero.org/user/register) This will allow you to sync and access your Zotero library from anywhere and to collaborate with colleagues.

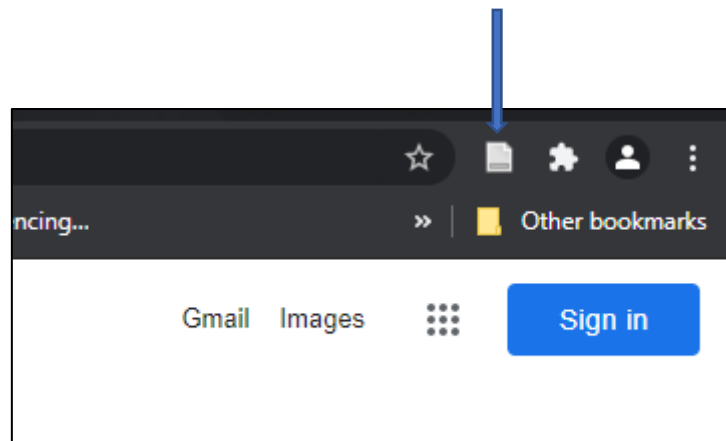
- If you create an account, login to Zotero (the downloaded programme) with the same account details. Go to Edit > Preferences > Sync.
- A Zotero app for iPad and iPhone is available from the Apple store. There is no app for Android but you can use the web account to access your library.

## Storage limits (web account)

- Syncing data to the web is free and unlimited. This includes bibliographic information you collect in your Zotero library about books and journal articles.
- Syncing files to the web is free up to 300MB. This includes attachments like PDFs. After this additional storage may be purchased should you wish to sync files: [www.zotero.org/storage](http://www.zotero.org/storage)

## Adding items with the Zotero Connector

Once the Zotero Connector is added to your browser, you should see it to the right of the address bar.



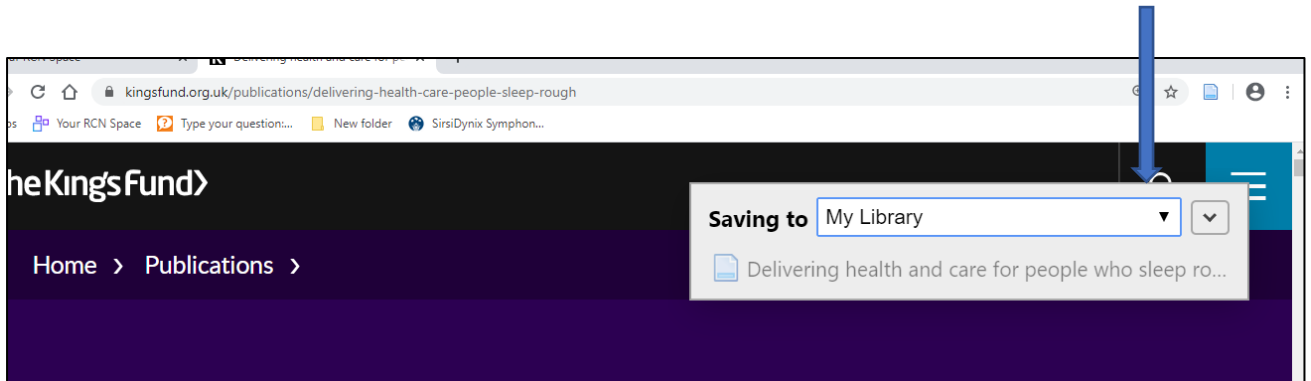
If you don't see it, look for the extensions within your browser settings and pin it.

The Connector may change to a different symbol depending on the type of item you are viewing (article, book, web page etc.).

To add content from the web to Zotero:

- Open Zotero on your desktop. Leave it open (you can minimise it)
- Find an item on the web
- Select the Zotero Connector
- A window will briefly appear as the information is collected. It is added to the collection (folder) you have open in Zotero

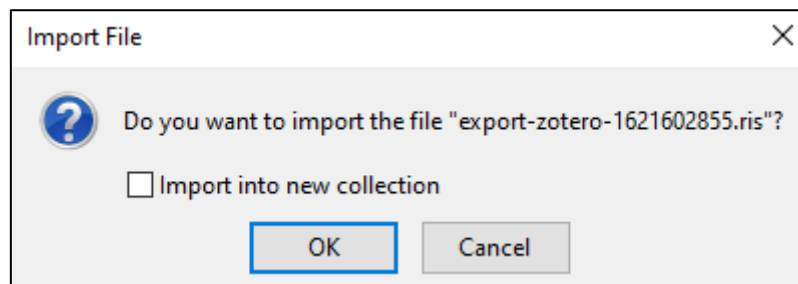
- The details of the item should now be in your Zotero library. The information collected is based on the meta data available from the source web page.



## Adding items from databases using RIS files

It is possible to export records from most databases to Zotero using the RIS file format.

- Look for the Export function within the database.
- Choose the option to export an RIS file
- If you have Zotero open it may directly import the records
- Alternatively, it will download an RIS file which you can import to Zotero.
- Open Zotero and open the downloaded RIS file. A pop-up window will ask if you want to import the file into Zotero. Select 'OK'



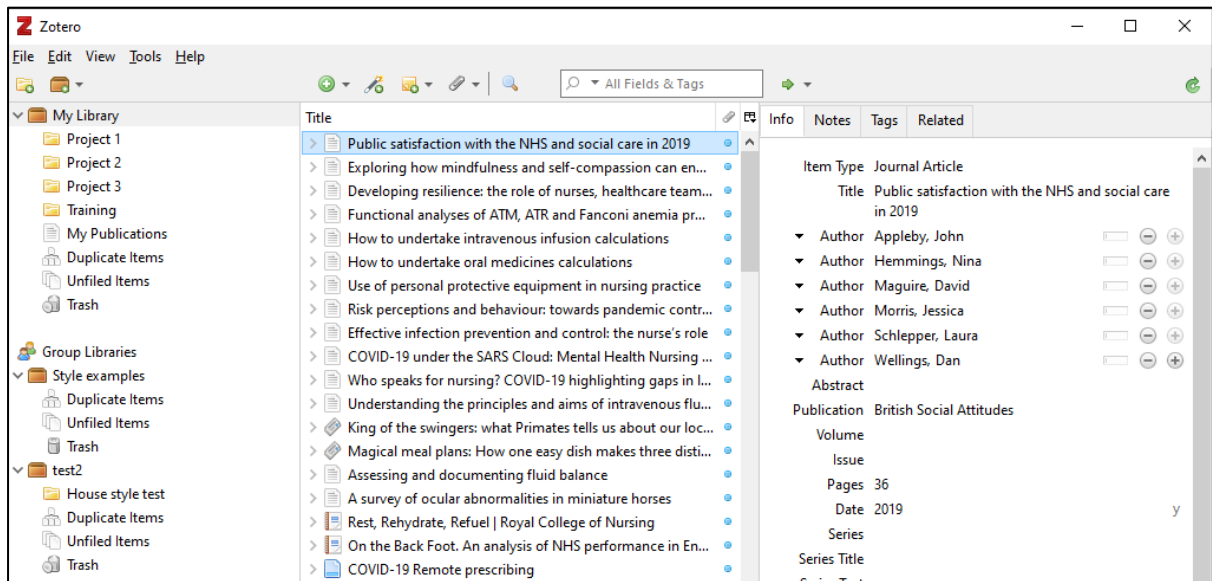
- Alternatively, within Zotero go to File > Import and you can then import the RIS file.

## Organising your Zotero library


The Zotero library is organised in three sections which are called 'panes'.

- The left pane contains your full library ('My Library') and your individual collections, which are subsets of 'My Library'
- The middle pane shows the items in the selected collection

- The right pane shows detailed information about the specific item that is selected in the middle pane.

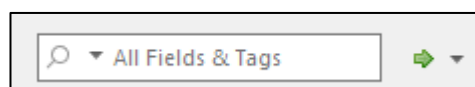


## Collections

To create a new collection right-click on My Library or click on the New Collection button  above the left pane.

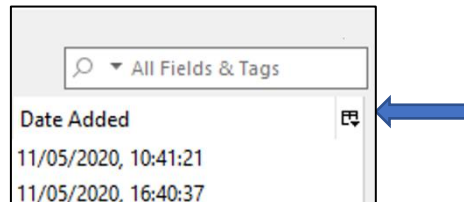
## Search

You can search across your Zotero Library to find items e.g. using author or title word. The search box is above the middle pane.

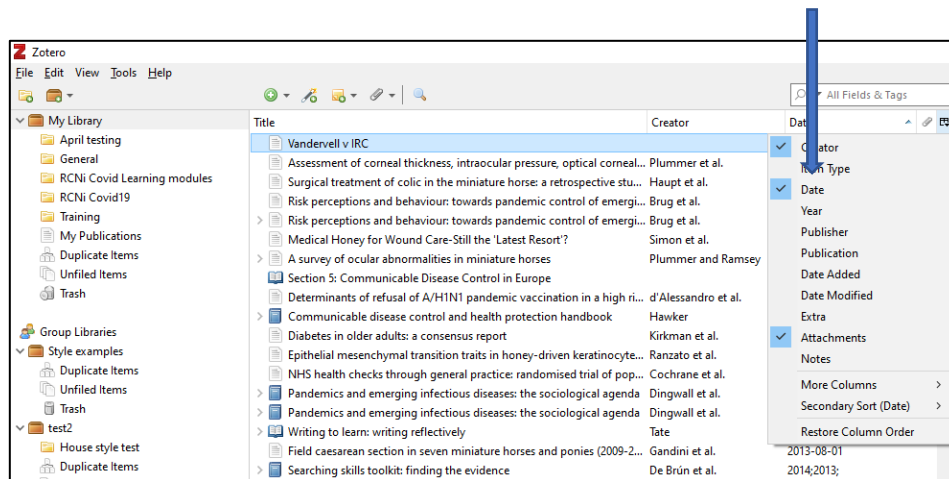


## Columns

You can change the columns displayed in the middle pane by using this button. It is located at the top right of the middle pane.



You can then add or remove columns, for example you could add the 'Date Added' column to see when items were added to your library.



You can sort items by clicking on a column heading.

## Editing items in your Zotero library

You can edit items in Zotero. This is useful if there is missing information or if an item is not appearing correctly in a bibliography or reference list.

Click on the item you wish to edit and make any required changes within the right pane.

Creator	Date	Date Added	Info	Notes	Tags	Related
Ranzato et al.	2012	12/05/2020, 09:30:38	Item Type	Journal Article		
Rogalska	2016	12/05/2020, 09:30:37	Title	Healing the Bee's Knees--On Honey and Wound Healing		
Naylor	2020-05-11T10:30...	12/05/2020, 09:26:28	Author	Rogalska, Tetyana		
Simon et al.	2009	12/05/2020, 09:30:37	Abstract			
			Publication	JAMA dermatology		
			Volume	152		
			Issue	3		
			Pages			
			Date	2016		
			Series			
			Series Title			
			Series Text			
			Journal Abbr			
			Language			

## Citation styles

Thousands of citation styles are available for use with Zotero including styles from many universities and publishers.

To select a style, use the Style Manager. Go to: Edit > Preferences > Cite. Choose from the styles listed or use 'Get additional styles.' This will link you to the Zotero style repository which contains over 10,000 styles. Click on any of these styles to add them.

Zotero Preferences

General Sync Search Export Cite Advanced

Styles | Word Processors

Style Manager

Title	Updated
ACM SIGCHI Proceedings - Extended Abstract Format	15/1/2017
American Chemical Society	10/3/2020
American Medical Association 11th edition	3/5/2020
American Political Science Association	24/11/2015
American Psychological Association 7th edition	23/4/2020
American Sociological Association 6th edition	19/2/2020
Chicago Manual of Style 17th edition (author-date)	26/4/2020
Chicago Manual of Style 17th edition (full note)	26/4/2020
Chicago Manual of Style 17th edition (note)	26/4/2020
Elsevier - Harvard (with titles)	22/1/2019
Harvard Educational Review	29/3/2013

[Get additional styles...](#)

Citation Options

Include URLs of paper articles in references

When this option is disabled, Zotero includes URLs when citing journal, magazine, and newspaper articles only if the article does not have a page range specified.

Tools

Style Editor Style Preview

OK Cancel Help

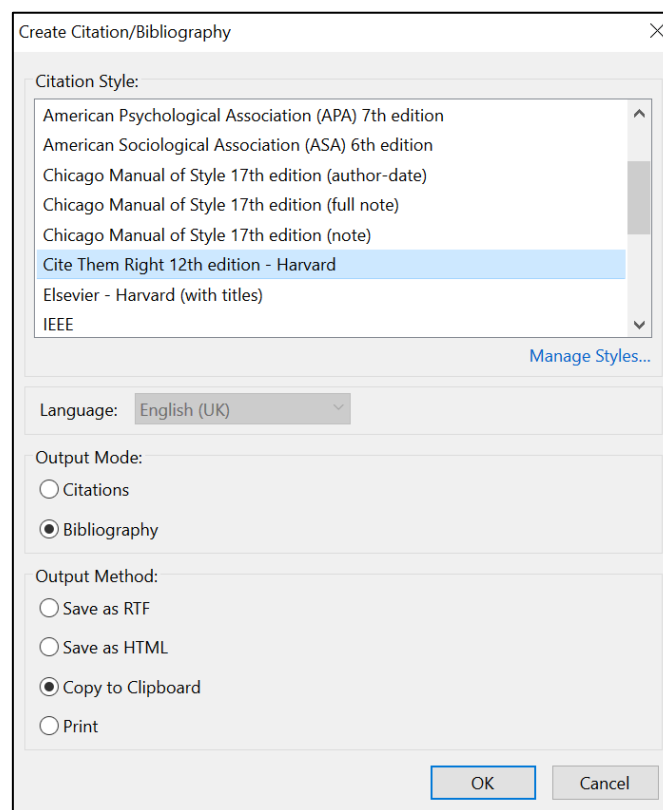
## Creating a bibliography or reference list

To create a bibliography or reference list:

- Select the items in Zotero. You can use ‘control and click’ to select multiple items.
- Drag and drop them straight into a Word document to create a reference list or bibliography.

Alternatively, right click on a collection to ‘Create bibliography from Collection’

- A box will appear, check the correct referencing style is selected
- Select ‘Bibliography’ and ‘Copy to Clipboard’ and then select ‘OK’



- Paste into your document (e.g. Word document). This will create your reference list or bibliography.

You should always check your bibliography/reference list to make sure it is correct. You are likely to find that some corrections are needed. There are two ways to make corrections:

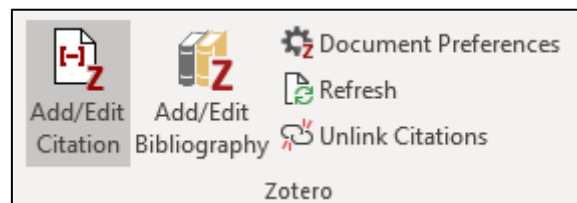
- Edit/correct the reference within your document, or:
- Go to Zotero, edit/correct the item, and create a new bibliography/reference list. This way the item will be correct if you use it again.



## Word processor plugins

You can add citations as you write a document using the Zotero plugin for your word processor. Plugins are available for Word, LibreOffice and Google Docs. You can find out more about word processor integration here:

[www.zotero.org/support/word\\_processor\\_integration](http://www.zotero.org/support/word_processor_integration)



## Collaboration

If you would like to share references and collaborate with colleagues, you can set up a group library within Zotero. This requires a Zotero web account and will use the storage quota of the group owner. A group with private membership will be visible only to the people you invite to join. You can create a group here: [www.zotero.org/groups/](http://www.zotero.org/groups/)

## Backing up your Zotero library

It is good practice to backup your Zotero library to an external hard drive so that you can recover your data should it be lost for any reason.

Zotero recommends using a backup utility that automatically backs up your entire hard drive to an external device on a regular basis. Most modern operating systems offer this functionality.

Alternatively, you can backup just the folder containing your Zotero data. To locate this, go to Edit > Preferences > Advanced > Files and Folder and find the 'Data Directory Location'

Close Zotero, and copy your data directory (the entire directory, including 'zotero.sqlite' and storage and the other subdirectories) to a backup location e.g. an external hard drive.

Syncing to the web is not a replacement for backing up. You may not be able to recover your data from the web account. The Zotero servers only store the most recent version of your library and it takes just a single (possibly automatic) sync to change the server copy. Therefore, you cannot rely on the Zotero server to restore your library to an older version in the event that you lose some or all of your data.

You can find out more about backing up and restoring your Zotero library here:

[https://www.zotero.org/support/zotero\\_data](https://www.zotero.org/support/zotero_data)

## Further help

RCN members can book a Zotero training session with the RCN Library and Archive service:

<https://www.rcn.org.uk/library/Support/Referencing-tools-and-training>

Zotero has a quick start guide which you may find useful:

[www.zotero.org/support/quick\\_start\\_guide](http://www.zotero.org/support/quick_start_guide)

Further support information is available on the Zotero website:

[www.zotero.org/support/](http://www.zotero.org/support/)

*Royal College of Nursing Library and Archive Service  
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