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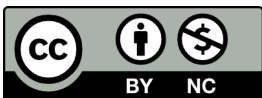
*Faculty of Education*

# Zotero Self-Paced Workbook

2013-14 v5a

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with

Dr Sara Hennessy and Dr Zsolt Lavicza



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## Note

This is a basic introductory workbook for Zotero. For full guidance, support forums, up to date information and screencasts of how to use key features, including links to Zotero on **Twitter** and **Facebook**, we *strongly* recommend you consult the developers' pages:

<http://www.Zotero.org/>

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

The **Knowledge Base** is also an excellent resource:

<http://www.Zotero.org/support/kb>

*Zotero is constantly being improved and updated so certain information/screen grabs etc in this workbook could quickly go out of date. Always consult the Zotero website for the most up-to-date and authoritative information.*

*This workbook is also based on using Zotero with Firefox on Windows PC computers using Microsoft Word 2010. While most of the features/instructions are similar on Apple Macintosh systems, for full guidance please consult the Zotero website. To access contextual menus on a Mac (right-click on a PC mouse): hold down CTRL key + then click with mouse: <http://www.wikihow.com/Right-Click-on-a-Mac>*

## Where to get the electronic copy of this workbook

At <http://tinyurl.com/orbitwiki>, scroll down the table and click on the zotero cell - below the 'ORBIT' logo. Scroll down the zotero page to find Files and resources to view and download the workbook.

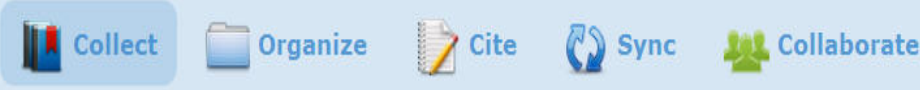
## How to use this self-paced workbook

Work through the tasks in the order they are presented. Course tutors will be available to offer support as needed during Faculty workshops.

## Acknowledgments

Full acknowledgements go to the Zotero developers and their excellent online guides. Many thanks also to Rosemary Deaney and Zsolt Lavicza for constructive feedback. Thanks also to Rosemary Rudd of the University Computing Service for sharing the UCS self-paced guide which proved most helpful and instructive.

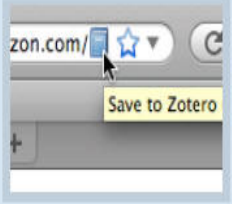
## Why use Zotero?



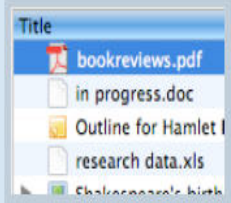
**Grab your research with a single click.**

**A personal research assistant.**

Zotero is the only research tool that automatically senses content, allowing you to add it to your personal library with a single click. Whether you're searching for a preprint on arXiv.org, a journal article from JSTOR, a news story from the *New York Times*, or a book from your university library catalog, Zotero has you covered with support for thousands of sites.



**Store anything.**



Zotero collects all your research in a single, searchable interface. You can add PDFs, images, audio and video files, snapshots of web pages, and really anything else. Zotero automatically indexes the full-text content of your library, enabling you to find exactly what you're looking for with just a few keystrokes.

Zotero is **free** software which you can use:

- to **record** references manually and from online searches;
- to **build** up a library as you search online, store references on your computer AND synchronise them online with a free Zotero account;
- to **tag** and **search** references, store abstracts and notes on your readings;
- to **compile** references in your course assignments or thesis automatically - Zotero is designed to work in conjunction with Word and with OpenOffice.

One of the main commercial alternatives is *EndNote* – a powerful programme which costs £60-£70 for a student licence. Zotero is excellent, easy to use and seriously worth checking out.

***Zotero will save you hours of typing out references.***

## Section 1: Installing the software/Basic Features

### Tasks 1 – 8

	<i>Completed</i>
1. Download and install Firefox	<input type="checkbox"/>
2. Download and install Zotero	<input type="checkbox"/>
3. Download and install the Word plug-in	<input type="checkbox"/>
4. Take a quick tour of Zotero	<input type="checkbox"/>
5. Set Zotero's Preferences	<input type="checkbox"/>
6. Left-hand Column: Create a collection	<input type="checkbox"/>
7. Middle Column: Find and store references	<input type="checkbox"/>
8. Right Column: Check & edit individual references	<input type="checkbox"/>

## TASK 1: Download & install Firefox

- To use Zotero, you need to use **Firefox** as your internet browser (*Zotero will not work with Internet Explorer*).



- Firefox is the main alternative to Internet Explorer (IE) and is an award winning browser used by millions. You can keep Internet Explorer on your system.
- On your computer/university workstation: open Firefox.
- If you haven't got Firefox on your personal laptop or home computer, download it from this location (English, GB version):

<https://mozilla.org.uk/>

- Alternatively, you can download Firefox in other languages here:

<https://www.mozilla.org/en-US/firefox/all/>

- Once you have installed Firefox, open it instead of IE.
  - It might ask you if you would like to set it as your default browser.
  - You can also import all existing 'favourites' from your IE: in Firefox, go to **File** in the top menu, then **import** and follow the instructions - the process is very quick and easy.

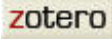


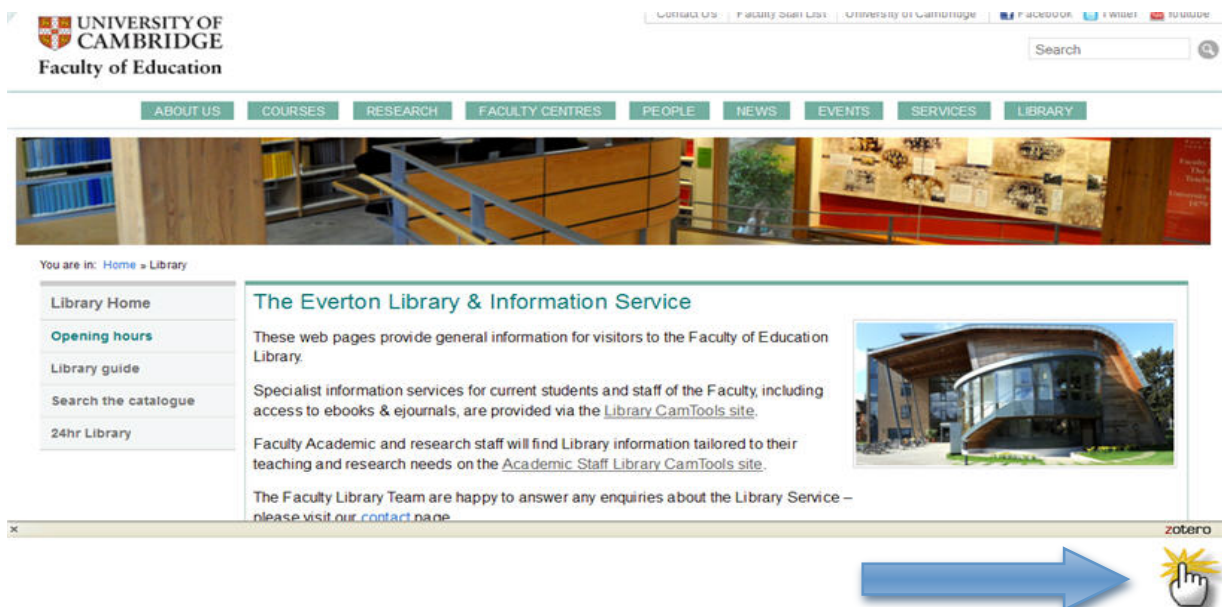
## TASK 2: Download & install Zotero

1. If you are using a University MCS workstation **follow the instruction sheet the tutors will give you to install Zotero & the Zotero Word plug-in**. Then go to **Step 6** below.
2. If you are working on your personal computer, Go to the Zotero homepage: <http://www.Zotero.org/>

Click the 'Download' link on the Zotero 'home' page:

**Download Now**

3. Find and click the download link for **Zotero for Firefox**
4. Zotero will download quickly - it lives as an 'add on' within Firefox.
5. Click 'yes' or 'allow' for any boxes that pop up during the installation.
6. When Zotero is installed, you'll see it 'living' in the bottom right hand corner of the Add-on bar of your Firefox browser (*see image below*): 
7. Check now.
8. If you can't see anything:
  - Close and Restart Firefox
  - Go to **View** then **Toolbars** in the top menu of Firefox
  - Make sure **Add-on** bar is ticked ✓
  - Check again. You should now see Zotero.



The screenshot shows the University of Cambridge Faculty of Education website. The top navigation bar includes links for 'ABOUT US', 'COURSES', 'RESEARCH', 'FACULTY CENTRES', 'PEOPLE', 'NEWS', 'EVENTS', 'SERVICES', and 'LIBRARY'. Below the navigation bar is a large image of the library interior. The main content area is titled 'The Everton Library & Information Service' and provides information about the library's services. In the bottom right corner of the browser window, the Zotero add-on icon is visible, indicated by a blue arrow pointing to it.

## TASK 3: Download & install the Word plug-in

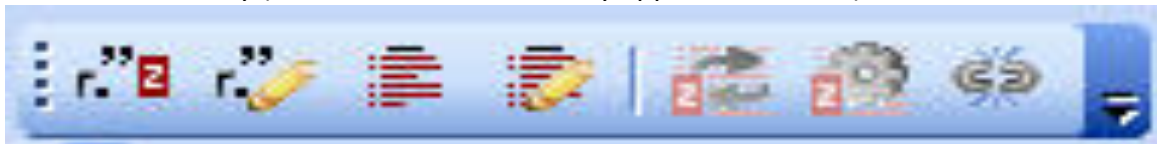
1. If you are using a University MCS workstation, **DO NOT follow Step 2**. Skip to **Step 3** to check you have installed the plug-in correctly (following the instruction sheet you used in Task 2).
2. If you are using your personal machine, install the latest Word plug-in for Mac or Windows depending on your operating system and your version of Word.

a. **Make sure Word is closed – the install will not work if Word is open!**

b. The download and install only takes a minute. You can access the plug-ins here:

[http://www.Zotero.org/support/word\\_processor\\_plugin\\_installation](http://www.Zotero.org/support/word_processor_plugin_installation)

3. After installing the Word plug-in, **open** Word:
  - a. If you see this row of icons in your Microsoft Word toolbar the plug-in is installed correctly (in Word 2007 & 2010 they appear in **Add-Ins**).



*Insert edit citation insert biblio edit biblio Refresh set doc prefs remove codes*

- These buttons allow you to manage Zotero references in your Microsoft Word documents.
- If you do not see them, try checking the “Templates and Add-ins” window in Word:
  - select “Tools” from the dropdown menu at the top of your screen
  - pull down to “Templates and Add-ins”
  - make sure that the box for Zotero.dot is checked.
- If you still can’t see the plug-in reinstall it following the steps above.
- Make sure you do not have Word open and click carefully on the **Install** button and **restart** Firefox when prompted.

*Tasks for integrating Zotero with Word will come later in Section 3 of this guide. For now,*

**RETURN TO FIREFOX and open Zotero (click on the Zotero icon in the bottom right-hand corner of Firefox).**

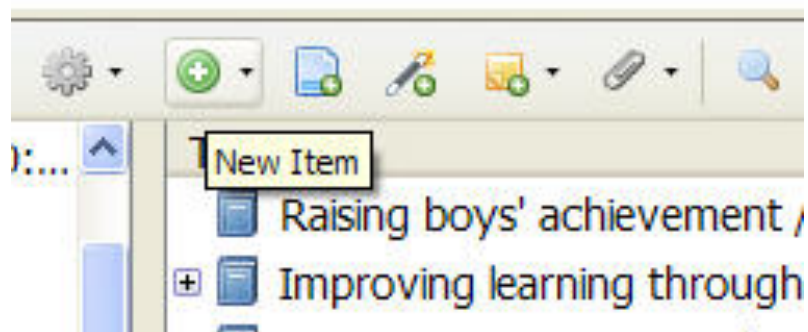
**TASK 4: Take a quick tour of Zotero**

**The Zotero Columns & Icons**

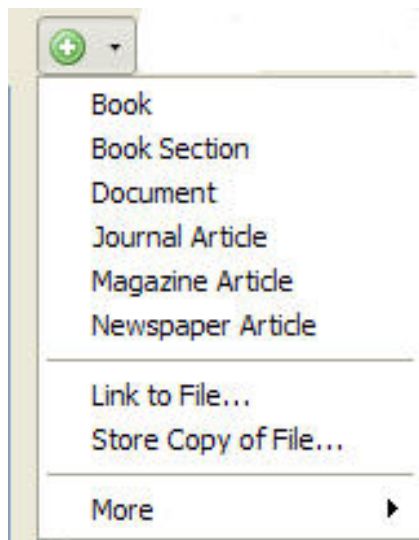
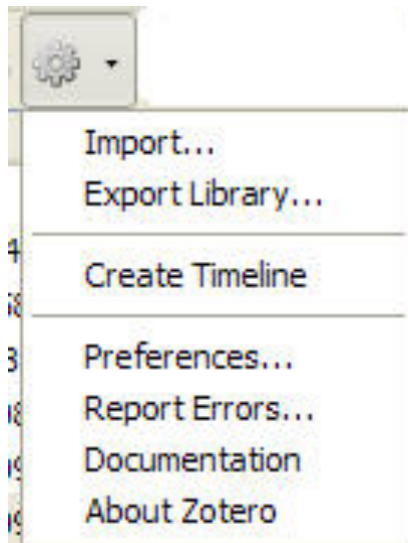
- You can **re-size** your library to make it bigger:
  - Hover your mouse over the top line of the Zotero library window until the cursor changes into a double arrow: ↑↓
  - Drag the line up and down to re-size Zotero
- Familiarise yourself with Zotero’s 3 main **columns**



- Move your mouse over the various icons to find out what they do.



- Clicking on some icons will reveal **drop-down menus**:



- You don't need to know all of the features and functions indicated by these icons to start using Zotero.

**For more information on Zotero's basic functions, you can visit Zotero's Quick Start Guide:**

**[https://www.Zotero.org/support/quick\\_start\\_guide](https://www.Zotero.org/support/quick_start_guide)**

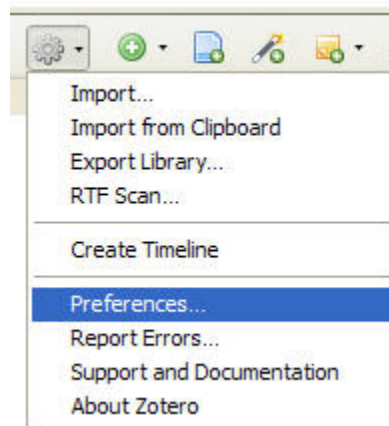
## TASK 5: Set Zotero's Preferences

Before you start gathering references with Zotero, take a few moments to explore and set Zotero's Preferences.

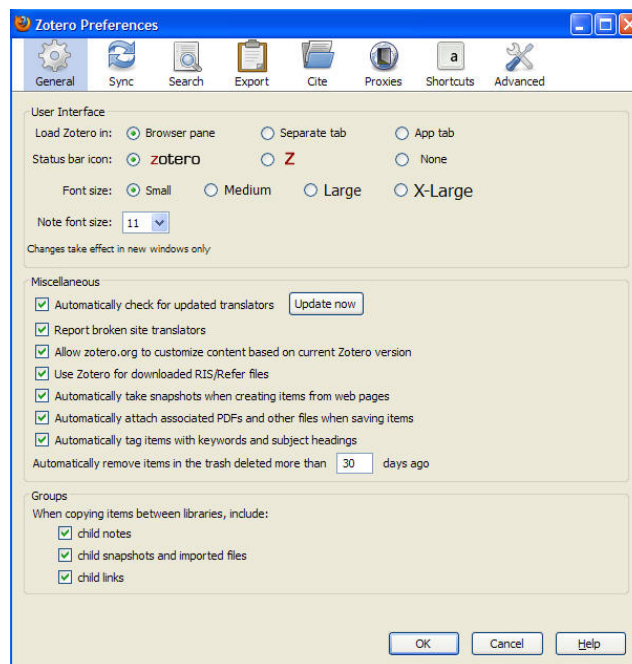
1. Click on the **actions** button – the gearwheel icon:



2. From the drop-down menu, select **Preferences**



3. This will open up the **Preferences** Box and Menu:



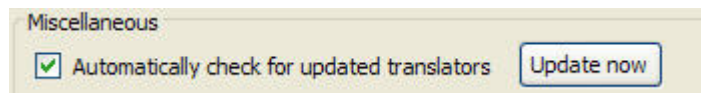
4. There are **8 tabs** for setting various preferences:

- General
- Sync
- Search
- Export
- Cite
- Proxies
- Shortcuts
- Advanced

Some of these are for users with advanced knowledge and experience of Zotero. We recommend you do not make any changes here unless you fully understand what you are doing (e.g. based upon advice from the Zotero website or forums). For this introduction to Zotero, we recommend you apply the following settings:



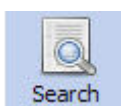
- *User-Interface*: your choice for how you wish Zotero to appear. You will need to close and re-start Zotero for any changes to make effect.
- *Miscellaneous*: ✓ tick all boxes and make sure you click Update Now



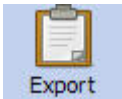
- *Groups*: ✓ tick all boxes



- Leave this alone for now – return to it when you have read more about creating a free Zotero account so that you can synchronise your library online. NB Sync is optional – you do not need to sync to use Zotero.
- Later you can click on 'about syncing' and 'about file syncing' to read more on the Zotero website (a new window in you browser will open up).



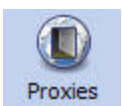
- PDF Indexing: Click to install – Click '**Check for Installer**'
- Leave everything else alone.



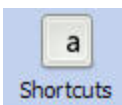
- For **Default Output Format**, on the drop-down menu select:
  - **American Psychological Association 6<sup>th</sup> Edition**
- Leave all other settings as is.



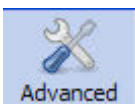
- Leave this for now – you will return to this later when using Zotero with Word.



- Check the box for 'automatically recognize proxied resources'
- Leave other settings as is.



- This is where you can change the default short-cut settings if you wish. We recommend you leave this unchanged for now.
- Any changes you make will take effect in new windows only.



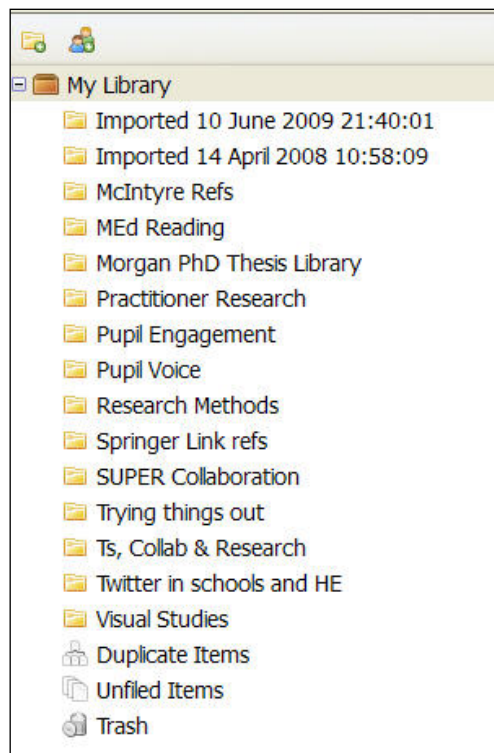
- Leave all settings alone.
- On the **Files and Folders** tab, click on the **Show Data Directory** button
  - This opens up your Zotero system files stored within your Firefox program files on the Hard Drive of your computer.
  - **Do not attempt to open any of these files – if you do you could corrupt your Zotero database!**
  - This button will come in useful later in **Task 18** when you learn how to back up your Zotero library.
  - **Close the window** that opened up and **close** the Zotero Preferences window.

## TASK 6: Left-hand column: create a collection

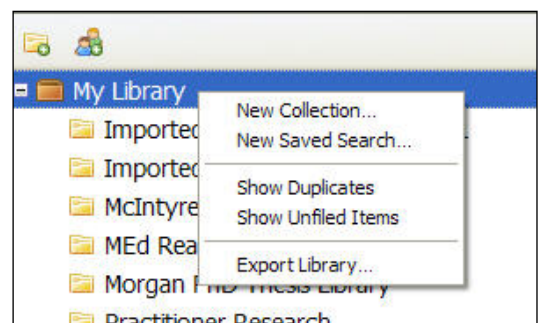
- Open Firefox
- Open Zotero: click on the Zotero icon in lower right corner

### The left-hand column

- All references are contained within '**My Library**'
- You can also create folders – called '**collections**' – for your references within Zotero:



- Create a new **collection** now
  - Right-click on the **My Library** icon
  - Select **New Collection** from the pop-up menu
  - **Name** your collection e.g. Trying out Zotero.
  - It will appear in the left-hand column. It's empty for now but in a later task you will store some references here.
  - Collections are subsets of **My Library**: if you click this, you will see the contents of all collections. **Unfiled Items** contains items you have not yet allocated to a collection.





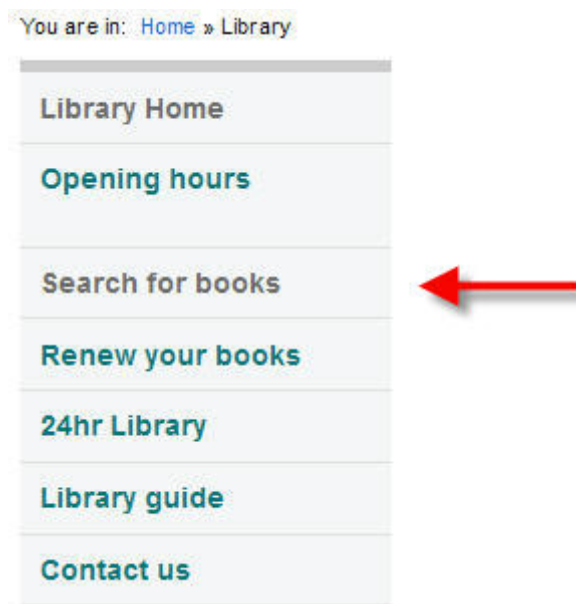
## TASK 7: Middle Column: Find & store references

Follow the steps below to have a quick demonstration of how Zotero can gather references for you from the University of Cambridge Library catalogues. **You will use these references later in Task 15 when you are using Zotero with Word.**

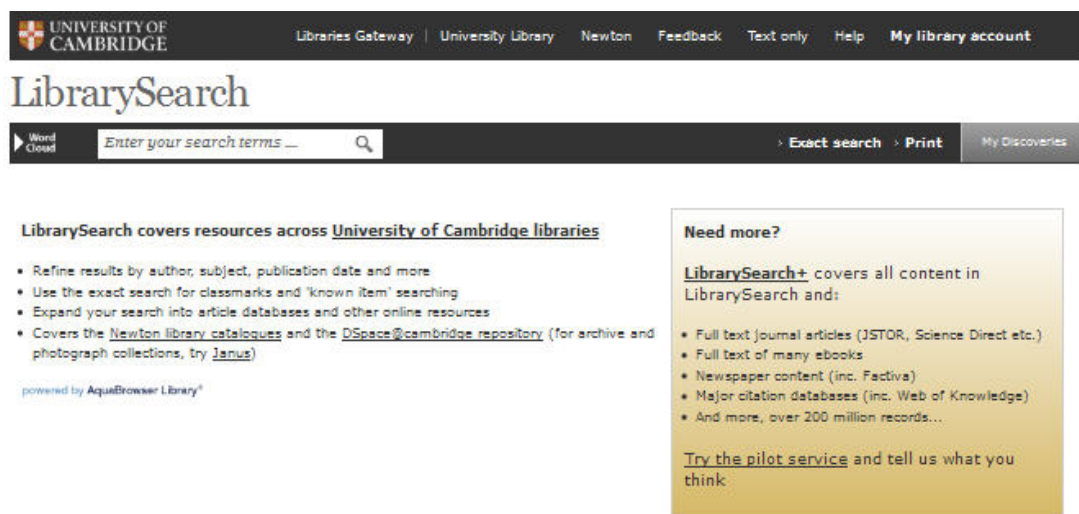
- Open Firefox: go to the Education Faculty Library Home Page

[www.educ.cam.ac.uk/library/](http://www.educ.cam.ac.uk/library/)

- Click on **Search for books**



- This will open the **LibrarySearch** Window:



- Enter the search term **Jean Rudduck**
  - Your search results will appear:

## LibrarySearch

The screenshot shows the LibrarySearch interface. At the top, there is a search bar with 'Jean Rudduck' entered. Below the search bar, there is a banner for 'LibrarySearch+' and a results summary: 'Results 1 - 25 of 53 for Jean Rudduck, sorted by: relevance'. The main content area shows two search results. The first result is an eBook titled 'Acquiring knowledge in initial teacher education : reading, writing, practice and the PGCE course / Gillian Squirrel ... [et al.]'. The second result is a book titled 'Developing a gender policy in secondary schools : individuals and institutions / Jean Rudduck'. On the right side, there is a 'Select Location' dropdown menu set to 'All locations' and a 'Refine' section with filters for Format (EBook (2)), Author (Rudduck, Jean (48), Flutter, Julia (9), etc.), and Publication Date (Last 5 years (1), Last 10 years (9)).

- Sort the results by '**year**' in order to access the most recent publications:

## LibrarySearch

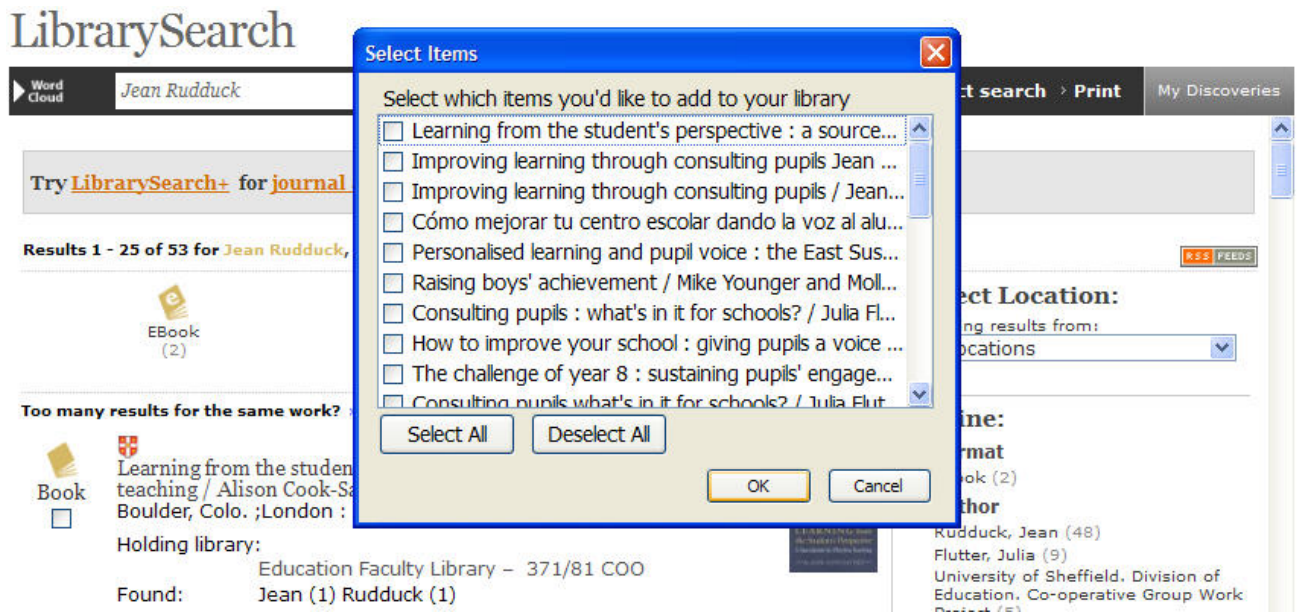
This screenshot is similar to the previous one, but the 'Results 1 - 25 of 53 for Jean Rudduck, sorted by:' dropdown menu is now set to 'year'. A red arrow points to this dropdown menu.

- Now look in the top bar of Firefox where the URL or web address is - in the 'navigation' bar - starts http etc
- Notice that a **small yellow folder icon** has appeared at the end of the bar: **Click** on this icon

The screenshot shows the Firefox browser's address bar with the URL 'http://search.lib.cam.ac.uk/'. At the end of the address bar, there is a small yellow folder icon.



- Zotero will display all the Rudduck references on the current webpage in a **Select Items** box:



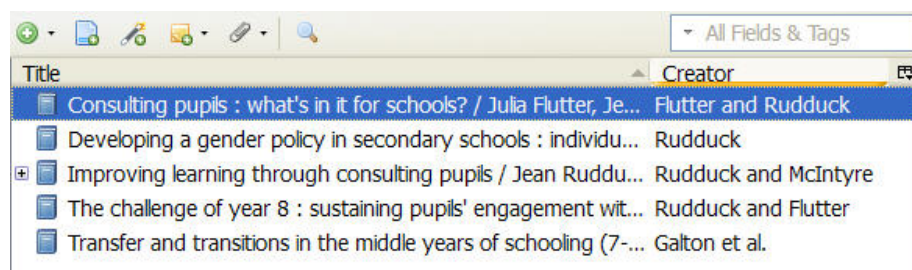
- **Select the following 5 items:** Check each box next to the item you wish to select

- *Improving learning through consulting pupils (2<sup>nd</sup> item)*
- *Consulting Pupils: what's in it for schools? (1<sup>st</sup> item)*
- *The challenge of Year 8: sustaining pupils' engagement*
- *Transfer and transitions in the middle years of schooling*
- *Developing a gender policy in secondary schools*

- Click **OK**: you'll see a small window (lower right-hand corner) briefly appear from Zotero telling you these have been saved.

- Now click on **zotero** in the bottom right hand corner of your Firefox to open up Zotero

- You'll see the references you selected already in the middle column of your new Zotero library:



- You will return to use these references with Word in Task 15.

## TASK 8: Right Column: Check/Edit Individual Reference Information

- In the **middle column**, click on the reference 'Consulting Pupils: what's in it for Schools?'
- Detailed information for the reference appears in the **right hand column**:



The screenshot shows the Zotero interface. On the left, a list of references is displayed under the 'All Fields & Tags' filter. The reference 'Consulting pupils : what's in it for schools...' by Flutter and Rudduck is selected. On the right, the 'Info' tab is active, showing the following details:

- Item Type:** Book
- Title:** Consulting pupils : what's Rudduck.
- Author:** Flutter, Julia
- Author:** Rudduck, Jean
- Abstract:**
- Series:** What's in it for schools?
- Series Number:**
- Volume:**
- # of Volumes:**

- The reference details might need tidying up. Any editing you do here will enable Zotero to produce an accurate bibliography list (coming up in Task 14).
  - Check that the details are correctly labelled.
  - For example, you can change an 'author' to an 'contributor' or 'editor' by clicking on the label 'author' and selecting 'contributor' or 'editor' from the drop-down menu:

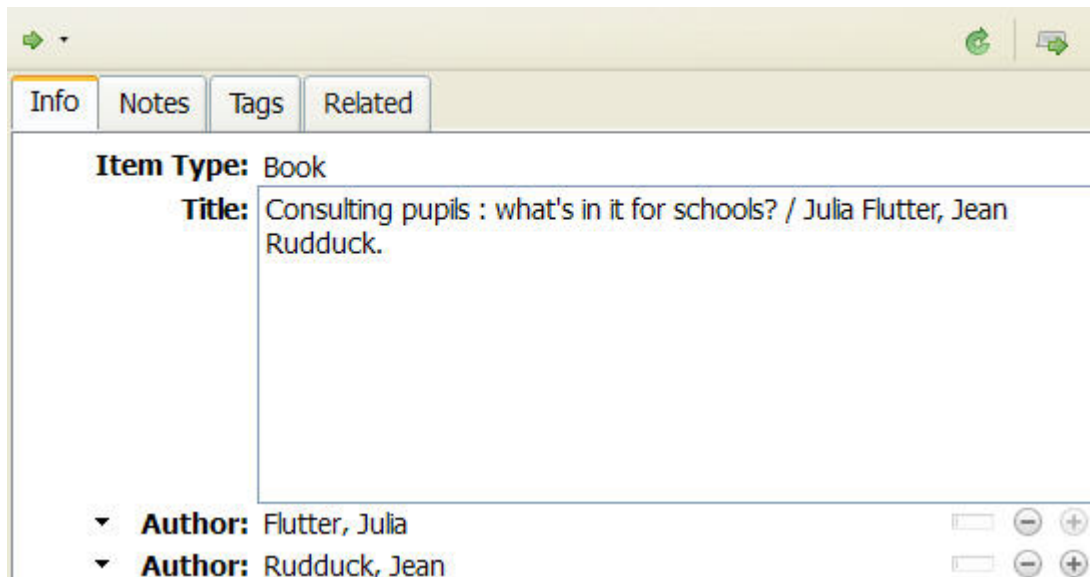
The screenshot shows the 'Info' tab for a book reference. The 'Contributor' field is selected, and a dropdown menu is open, showing the following options:

- Author
- Contributor
- Editor
- Series Editor
- Translator

The reference details shown are:

- Title:** Improving Learning Through Consulting Pupils
- Author:** Rudduck, Jean
- Contributor:** McIntyre, Donald
- Edition:**
- Place:** London
- Publisher:** Routledge
- Date:** 2007

- You can also edit names or delete information which is not essential.
  - Open the *Transfer and transitions* reference: note that 'Great Britain' appears as an author – this need to be deleted.
  - Click on the minus sign (next to the name) to remove it from the list.
- To edit a title (if necessary) **click on the title text** and a text box will appear:



- **Make your changes.** In this example, we delete the forward slash (/) and the authors' names.
- **To close the text box,** click anywhere in the reference entry in the right hand column (anywhere other than the title). Your edit is saved.
- Take a moment to look through the information you can store about each reference in the right-hand column:
  - **Item Type:** click on this to reveal a drop down menu (handy for when you manually create a reference)
  - **Author:** click here to reveal a drop down menu (handy for when you need to use 'editor' etc)
  - **Abstract:** you can type or copy and paste text into this section
  - **Notes Tab:** You can type or paste text here. Good for keeping track of your thoughts, key quotes etc.
    - Click on **Add** and type in some text. It will be attached to your reference – see the yellow 'post-it' icon.

- **Tags Tab:** You can tag references with key words. Good for searching quickly through a large library.
- **Related Tab:** You can use this to link related items from your library.
  - Click on **Add** and link another reference in your list to 'Consulting Pupils'. This is a good way to remind you of links you want to make between items.

### Key Principle

*Checking and manual editing of downloaded references is essential so that when you generate bibliographies or use Zotero to manage citations in your essays/thesis your references will appear correctly.*

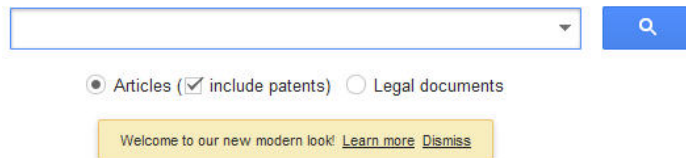
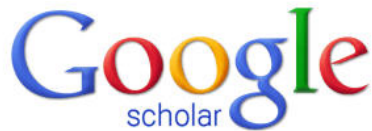
## Section 2: Searching, Sorting, Reports & Creating Bibliographies

### Tasks 9 – 14

	<i>Completed</i>
9. Search Google Scholar	<input type="checkbox"/>
10. Search JSTOR	<input type="checkbox"/>
11. Search Web of Science	<input type="checkbox"/>
12. Sort your references	<input type="checkbox"/>
13. Generate a report	<input type="checkbox"/>
14. Create a bibliography	<input type="checkbox"/>

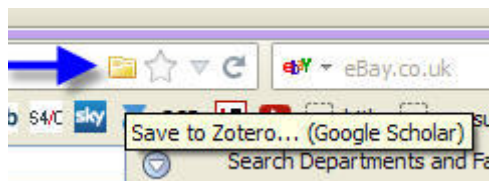
## TASK 9: Search Google Scholar

1. Go to Firefox's address bar: enter **scholar.google.co.uk** to go to Google Scholar.

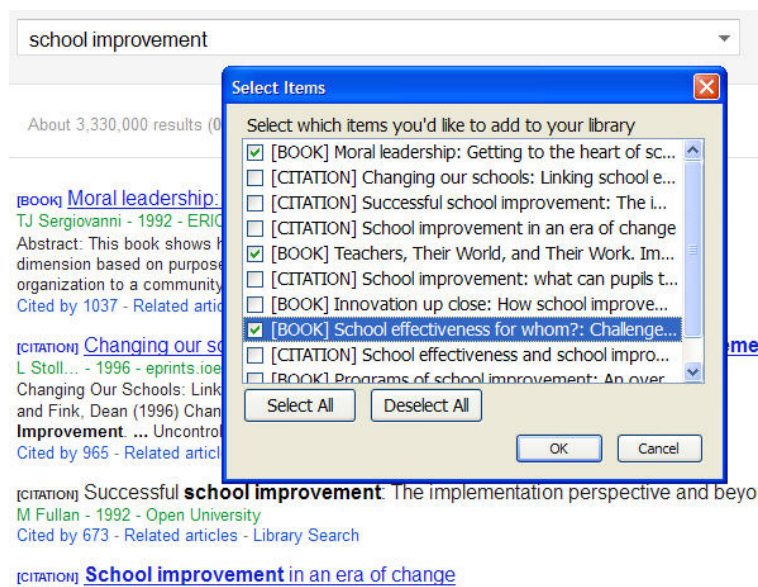


**Stand on the shoulders of giants**

2. Enter some key words in the search box and click "search". *Suggestions for key words: link to educational research topics you are interested in e.g. 'school improvement', 'classroom teaching', 'boys' achievement' etc.*
3. When you have your results, look at the top right of the address bar: find the small yellow folder icon. Click it once. *If you cannot see the yellow folder, go to Zotero's Preferences (Task 5) and under the General Tab click the button 'Update Now'. Then refresh your Google page.*



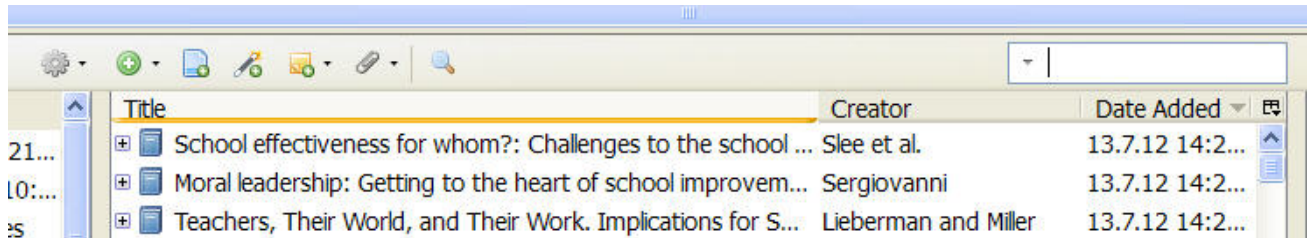
4. Your search results on the current page are listed with a check-box beside each one.





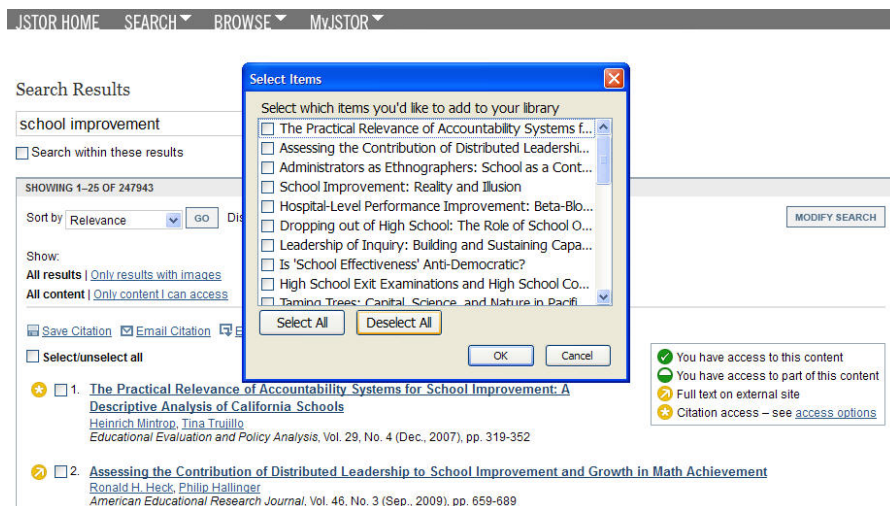
5. Select the results you'd like to keep. Or click **Select all**, then **OK** to download all of the page results into Zotero.

6. Open your Zotero library (click on the Zotero icon). Check the **middle pane**: you will see your selections have been downloaded into your Zotero library.



## TASK 10: Search JSTOR

1. Open up Zotero and create a new collection (see Task 6). Name it **JSTOR Search**. Make sure this collection is highlighted/selected.
2. You can now close Zotero while you conduct your search in Firefox – Zotero will still be working in the background.
3. Go to **www.jstor.org** and do a search for the key term/s you used in Task 9 or select a new key term. *If you are working from home/outside the University then you will need to login to JSTOR to download pdfs.*
4. Click the Zotero folder icon in the address bar and select all or some of the items to download. Click OK to start the download.



4. Open Zotero and check the **middle pane**: your new downloads are listed in the **JSTOR Search** collection. *If they are not in your JSTOR collection check you followed Step 1 above. The references will be in your main **My Library** – you can drag and drop them into the JSTOR collection.*

# TASK 11: Search Web of Science

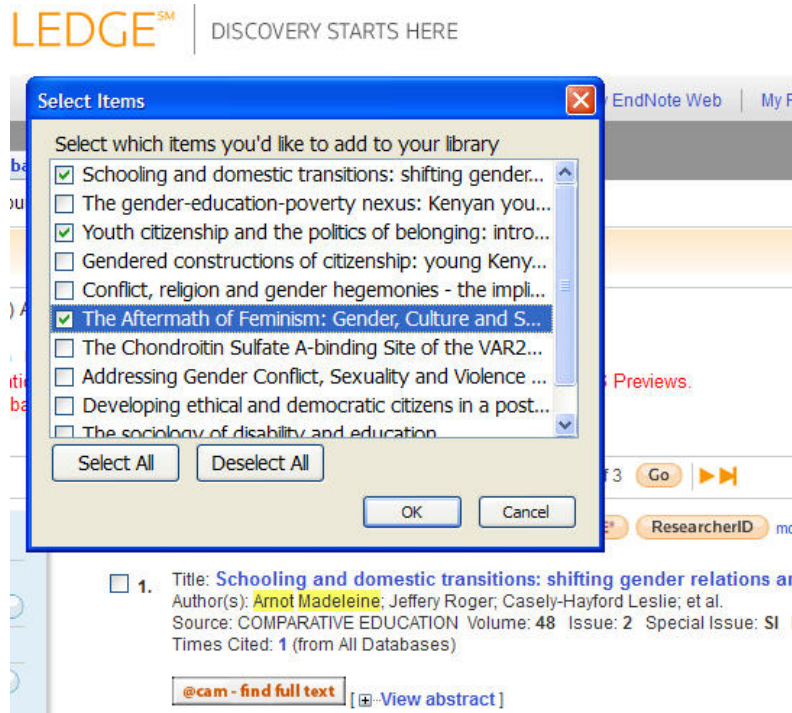
1. In Firefox, go to <http://wok.mimas.ac.uk/>

2. Click the orange Access Web of Knowledge button to search. From faculty/university network computers, you will not have to log-in. *When accessing from outside the University, you will have to log-in via 'shibboleth' – UK Federation – University of Cambridge – Raven log-in.*

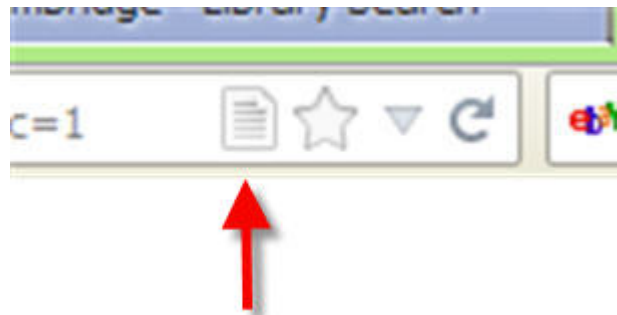
3. Search for articles by one of our faculty Professors: **Madeleine Arnot** or **Kenneth Ruthven**. Enter **Ruthven K** or **Arnot M** in the first field, select author and click on the orange Search button:

*If you experience any problems with All Databases, click on the tab **Web of Science** and carry out the search there instead.*

4. On the results page, look for the yellow folder icon at the top right of the address bar. If it appears, click it to select and download the references you want.



5. If it does not appear, click on one reference on the page that you are interested in. Look in the toolbar for a 'page' icon:



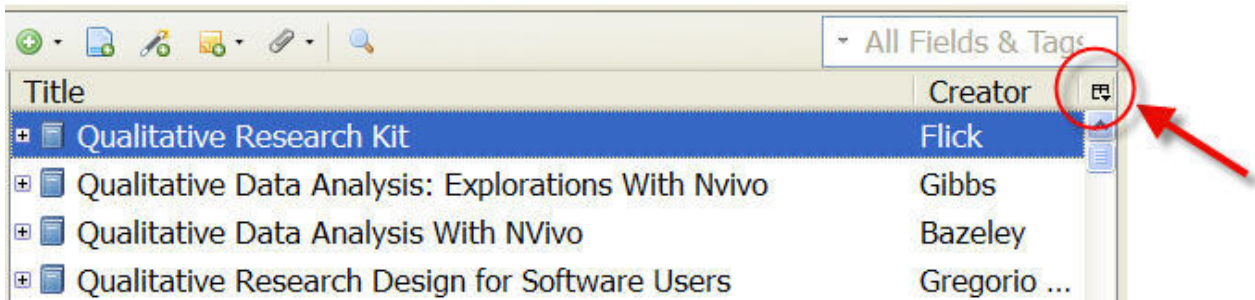
6. **Click** on this icon to download this individual reference. Or try your search again via the 'Web of Science' tab (this does appear to trigger the yellow folder).

7. **Open** your Zotero library and check the middle pane to find your newly downloaded references.

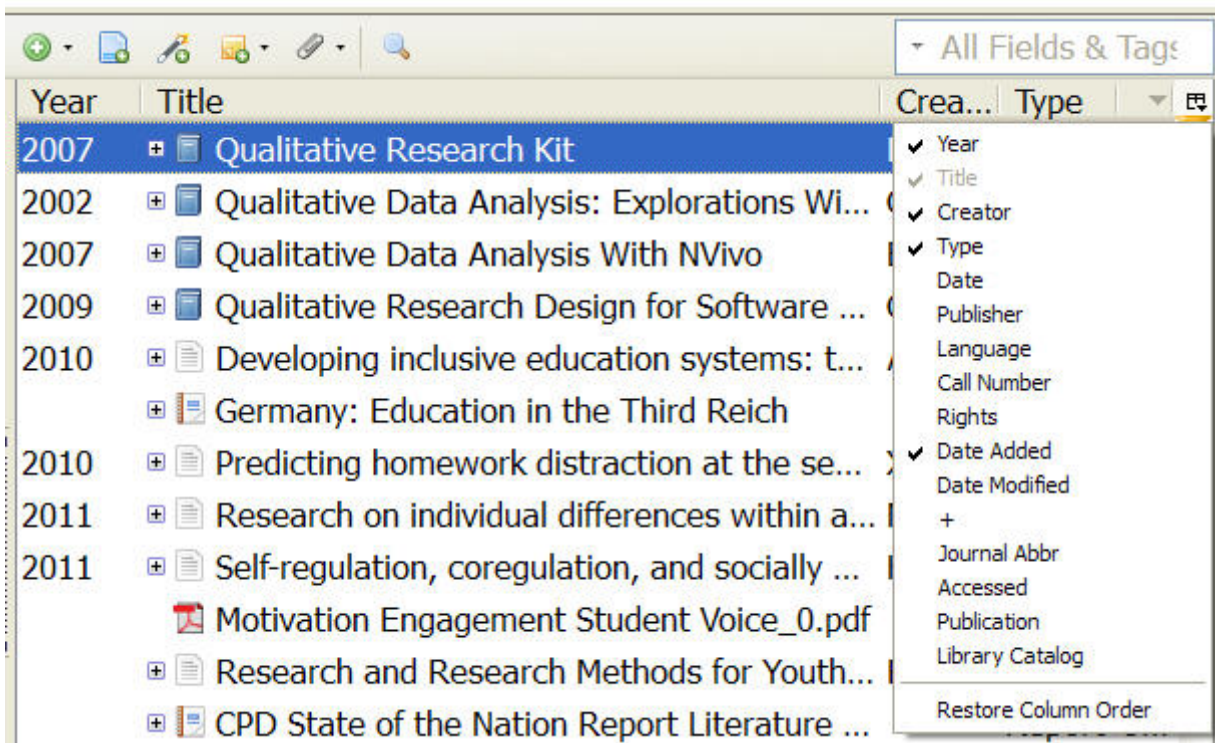
## TASK 12: Sort your references

Now that you have a number of references in your new Zotero library, learn how to sort them. Zotero has a number of features that help you to quickly sort and organise your references. Follow the instructions below to customise the middle column of your Zotero library beyond the default settings of title and author/creator.

1. Click the small **grid-like menu** on the top right of the middle column:



2. From the drop-down menu choose the additional column headings you'd like to set up (Tip: 'date added' is very useful for helping you to find recent additions to your library).



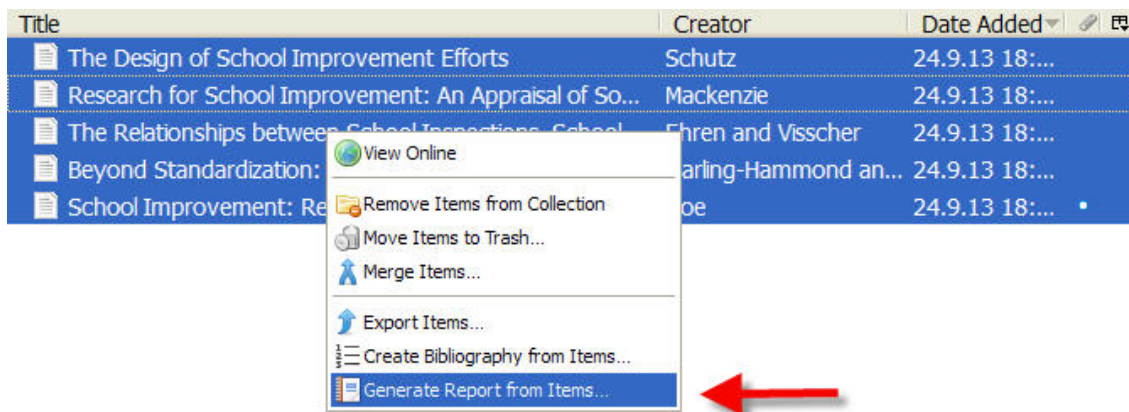
3. You can now sort your library using the new headings you've selected: click on any heading in the middle column to sort e.g. by year, author/title alphabetically (A-Z, Z-A), date added etc.

4. You can also create further **collections** and **sub-collections** to sort/organise your references further if you wish.

## TASK 13: Generate a report

The **'Generate Report'** command is very useful: Zotero will generate a report of all selected items in your Firefox browser window, including any notes you have attached to individual references (see Task 8). This can be very useful for **printing out** to support writing up literature reviews or sharing references with a research team etc.

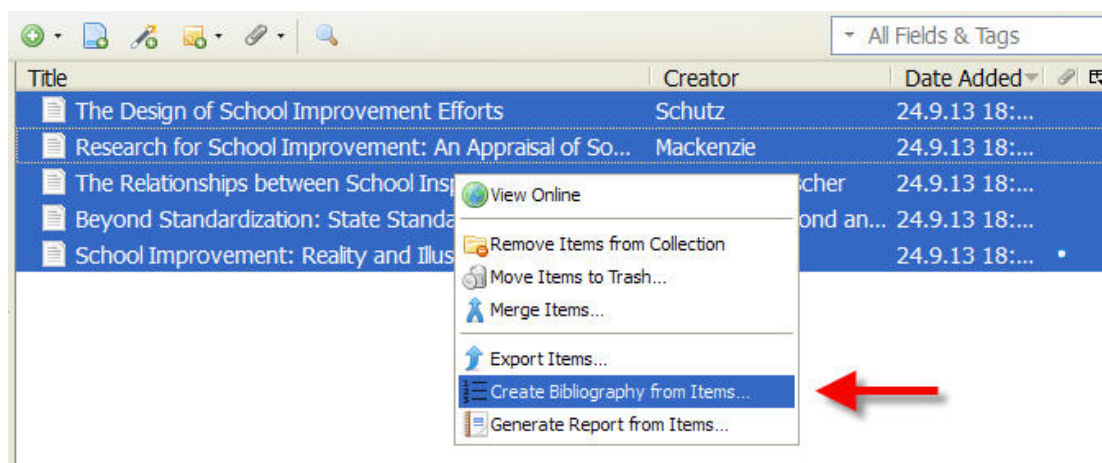
1. From within Firefox, open up your Zotero library.
2. In the **middle pane**:
  - select all the items you want to include in your list (Keyboard: CTRL-A)
  - or for non-contiguous items hold down **CTRL** (CMD on Mac) while you click your selection.
3. Right-Click your mouse anywhere in your highlighted selection to reveal the drop-down menu.
4. Select the command: **'Generate Report from Items'**



5. Zotero will now 'generate' a report for you in the main Firefox browser window. Each item you have selected will be displayed, along with any notes or tags you have attached to the items.

## TASK 14: Create a bibliography

1. From within Firefox, open up your Zotero library.
2. In the **middle pane**:
  - select all the items you want to include in your list (Keyboard **CTRL-A**)
  - or for non-contiguous items hold down **CTRL** (CMD on Mac) while you click your selection.
3. Right-Click your mouse (CTRL-Click on Mac) anywhere in your highlighted selection
4. Select the command: 'Create Bibliography from Items'



5. Select the **citation style**, **output mode** and **output method** from the next dialog box:
  - **Citation Style:** select **APA 6<sup>th</sup>**
  - **Output Mode:** select **Bibliography**
  - **Output Method:** select **Copy to Clipboard** and click **OK**
6. Open **Word** and create a new document:
  - **Paste** (Keyboard **CTRL+V** on PC, **CMD+V** on Mac/) your Zotero items into it
  - You now have a bibliography created in seconds.
  - If any references are displayed incorrectly, remember you need to edit them back in Zotero (**see Task 8**) then repeat the steps above to 'create bibliography'. Any changes you make in your Zotero records will now be displayed.
  - You can use this feature to print your bibliography. **Tip:** *print out hard copies of your Zotero bibliography periodically as an extra back-up (useful if your computer breaks down, hard drive fails etc).*

## Section 3: Zotero & Word - Citations & Reference Lists

### Tasks 15 - 17

*Completed*

15. Use Zotero to insert a full citation into a document
16. Other Citation Types:
1. Author/s in sentence – date in brackets (Suppress Author)
  2. Two or more citations (multiple)
  3. Suffix added – page number
  4. Prefix and suffix added
17. Create a reference/bibliography list from your citations



## TASK 15: Use Zotero to insert citations into a Word document

In this section you will use the Zotero Word plug-in to:

- insert different kinds of citations into a prepared Word document for you to practise using your Zotero library;
- create a reference list/bibliography following your chosen reference style (APA 6<sup>th</sup> recommended) from the citations.
- Download the practice text from here in the section **Files and Resources to view and download**:

[http://orbit.educ.cam.ac.uk/wiki/A\\_Zotero\\_Self-Paced\\_Study\\_Guide](http://orbit.educ.cam.ac.uk/wiki/A_Zotero_Self-Paced_Study_Guide)

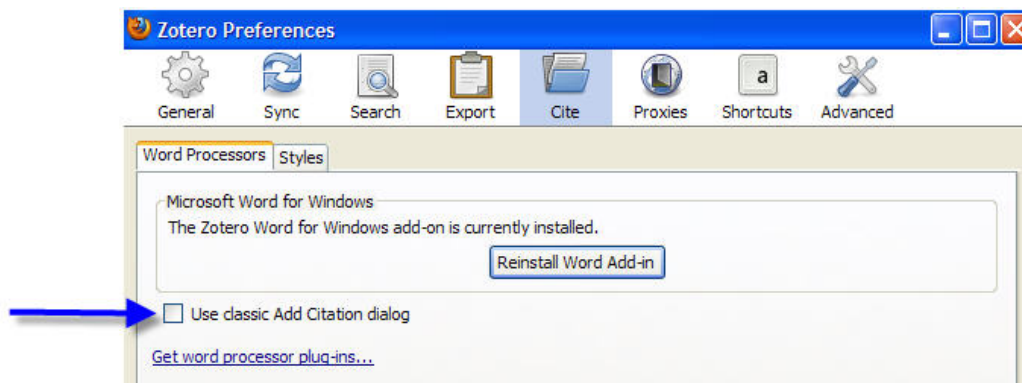
### 1. Before you start: Sorted and Classic dialogs

➤ Zotero gives you **2 ways** to insert citations from your Zotero library into a Word Document. You can choose between:

- Sorted dialog
- OR
- Classic dialog


The default mode is 'sorted dialog'.

- This guide will instruct you on how to use the Sorted dialog. You can try the Classic dialog by yourself later and decide which you prefer.
- You can set your preference to the classic by accessing the Cite tab in Zotero's Preferences – see TASK 5 – and checking the box:



- **TIP:** if you experience problems with the default 'sorted' dialog, switch to the Classic dialog.

## 2. Inserting Citations with the Sorted Dialog (the Bubble)

- Make sure you have installed the Word plug-in (**see Task 3**). Open Firefox.
- Open Word and open the practice document you have been given. Check the toolbar: You should see this row of icons  (In Word 2007 & 2010 they appear in **Add-Ins**):

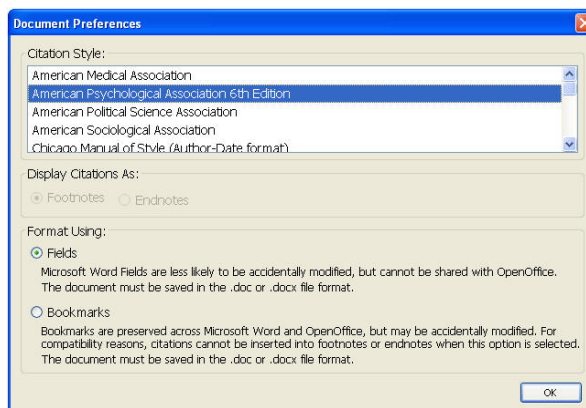


*Insert edit citation insert biblio edit biblio Refresh set doc prefs remove codes*

- These buttons allow you to manage Zotero citations in your Word documents.
  - If you do not see them, try checking the “Templates and Add-ins” window.
    - Select “Tools” from the dropdown menu at the top of your screen, pull down to “Templates and Add-ins,” and make sure that the box for Zotero.dot is checked.
  - If you see a warning message (upper left below the main menu) that macros have been disabled, click Options and enable these to permit the Zotero add-in to work.
- To insert a reference from your Zotero library, highlight the first citation – including brackets – in the document i.e. Rudduck, 1994:

The project was concerned with factors that affect pupils’ progress between the ages of 7 and 14 (Rudduck, 1994). As mentioned by Rudduck & McIntyre (2007), we start by considering the primary side of the transfer divide, move

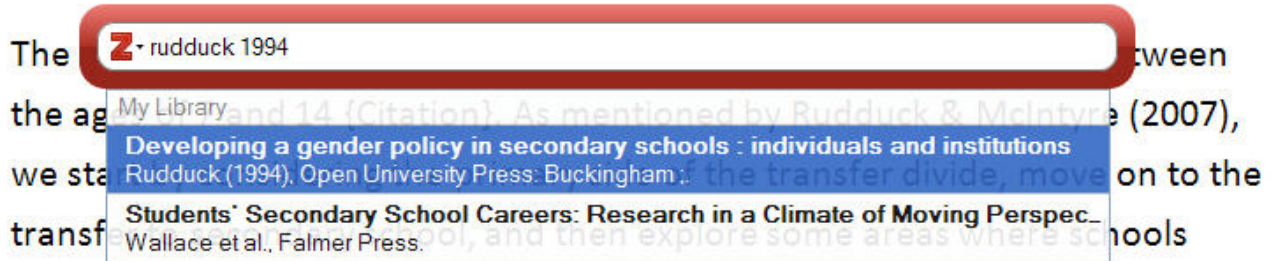
- Click the first button on the Zotero toolbar: “Zotero Insert Citation”
- The Document Preferences window will open. Choose the bibliographic format you would like to use from the list and click OK (APA – American Psychological Association 6th Edition recommended).



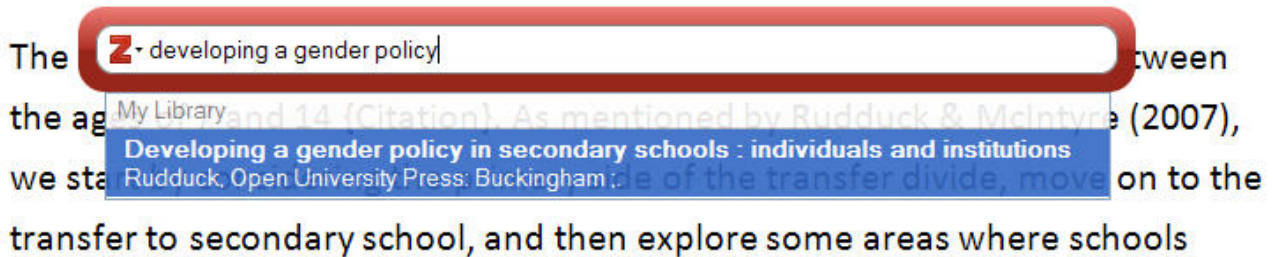
- The Zotero Bubble appears:



- Search for your reference by typing in this Bubble. You can search your library by author and date or type in words from the title e.g. Rudduck 1994



- or 'developing a gender policy':



- Choose **Developing a gender policy in secondary schools**: click once on the title and the correct reference will appear in the bubble:



- Press return on your keyboard to insert the citation into your document. It should appear as follows in your text:

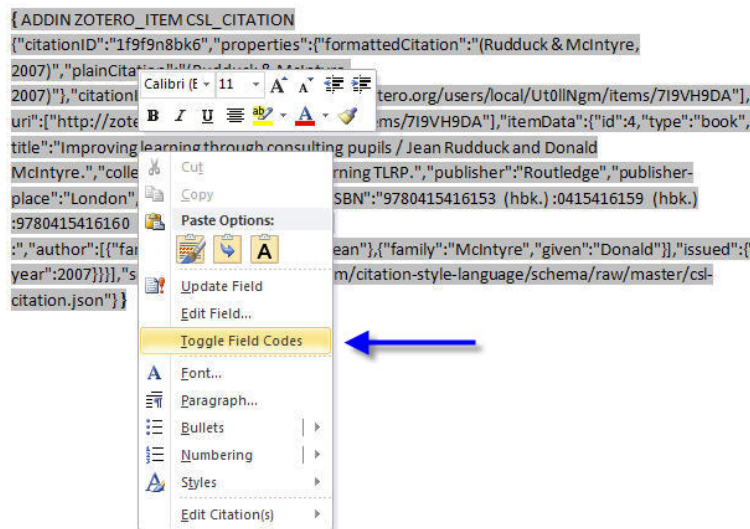
The project was concerned with factors that affect pupils' progress between the ages of 7 and 14 (Rudduck, 1994). As mentioned by Rudduck & McIntyre (2007), we start by considering the primary side of the transfer divide, move

- You can tell your citation is 'live' (linked to Zotero) by placing the cursor within it – it will then appear 'greyed out' as in the above example.

- If you can see double brackets e.g. ((Rudduck, 1994)) then you need to manually delete the brackets you originally put in before you inserted the Zotero citation. *Make sure you do not delete any part of the Zotero citation!*
- You might see the following instead – all the field codes displayed:

```
{ADDIN ZOTERO_ITEM CSL_CITATION
{"citationID":"1f9f9n8bk6","properties":{"formattedCitation":"(Rudduck & McIntyre,
2007)","plainCitation":"(Rudduck & McIntyre,
2007)","citationItems":[{"id":4,"uris":["http://zotero.org/users/local/Ut0llNgm/items/719VH9DA"],"
uri":["http://zotero.org/users/local/Ut0llNgm/items/719VH9DA"],"itemData":{"id":4,"type":"book","
title":"Improving learning through consulting pupils / Jean Rudduck and Donald
McIntyre.","collection-title":"Improving learning TLRP.","publisher":"Routledge","publisher-
place":"London","event-place":"London","ISBN":"9780415416153 (hbk.):0415416159 (hbk.)
:9780415416160 (pbk.):0415416167 (pbk.)
:","author":{"family":"Rudduck","given":"Jean"},{"family":"McIntyre","given":"Donald"}],"issued":{"
year":2007}}}], "schema":"https://github.com/citation-style-language/schema/raw/master/csl-
citation.json"}}}
```

- If this happens, select the whole entry, right-click your mouse (CTRL-click on Mac) and select **Toggle Field Codes**.



- This should now display the citation correctly as: (Rudduck 1994).
- Move to **Tasks 16.1 – 16.4** to practise inserting and editing citations in your document, repeating the above basic steps. You will learn how to insert and edit **4 more types of citations**:
  - Author/s in sentence – date in brackets: Rudduck & McIntyre (2007)
  - Two or more citations: (Rudduck, 1976; Rudduck & Flutter, 2004)
  - Suffix added – page number: (Rudduck, 1976, p.23)
  - Prefix and suffix added: (see Flutter & Rudduck, 2004, for details)

## TASK 16.1: Author/s in sentence – date in brackets (Suppress Author)

- For Task 15 you used Zotero to insert a full citation within brackets i.e. a citation containing Author + Date e.g.

*... pupils' progress between the ages of 7 and 14 (Rudduck, 1994).*

- If you name the author/s in your sentence then you need to **suppress** the author/s name/s in your citation e.g.

*Villarreal (2008) calls this transition the shift from ...*

*Ruthven and Hennessy (2002) offered a model of ...*

Zotero makes this easy to do via the **edit** button on the Zotero toolbar within Word.

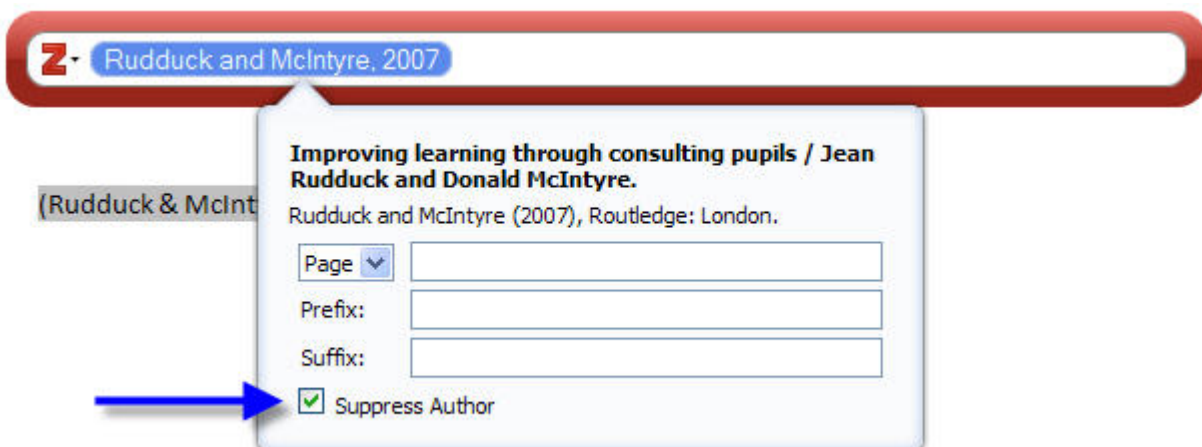
- Insert the citation for Rudduck & McIntyre, 2007 following the same steps you took in Task 15 so it first looks like this:

*As mentioned by Rudduck & McIntyre (Rudduck & McIntyre 2007) ...*

- Place your cursor within this citation to edit it.
- Click the edit button on the Zotero toolbar within Word



- Click on the citation when it appears in the Bubble dialog. This will open a box where you can edit your citation. For this task, check the box **Suppress Author**:



- Press return and your citation will now appear as date only e.g. (2007).

## TASK 16.2: Two or more citations (multiple)

- Sometimes you will want to support or illustrate a point with two or more citations i.e. **multiple citations** e.g.

... and the post-transfer period (Galton et al, 2003; Rudduck & Flutter, 2004).

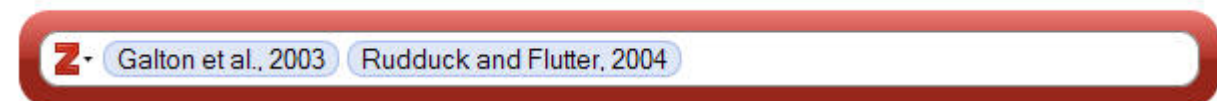
- Return to your Word Document. Follow the steps you learnt in Task 15 to insert a citation. However, **do not press return on your keyboard** until you have selected the two citations you need i.e. *Transfer and transitions* and *The challenge of Year 8*
- Click on 'insert citation' on the Zotero toolbar



- Search for a citation in the Zotero bubble and click once in the drop-down list to select it:



- After selecting the first item, don't press return. Type the **author, title,** or **year** of the second citation you want to select.



- Now press **RETURN** on your keyboard to insert your multiple citations in your document. Your citations will now appear within brackets and correctly separated by semi-colons:

(Galton, Gray & Rudduck, 2003; Rudduck & Flutter, 2004)

## TASK 16.3: Suffix added – page number

- If you quote from a source, you must provide the page number as a suffix along with author+date in your citation e.g.

... *between years within the same school (Galton, Gray & Rudduck, 2003, p.23).*

- Return to your Word document and insert the citation for 'Galton, Gray & Rudduck 2003' (follow steps for Task 15). Once inserted, place the cursor within the Galton et al citation. The citation will appear highlighted in grey:

(Galton, Gray, & Rudduck, 2003)

- Click on the **Edit** button on the Word Zotero tool-bar to reveal the Zotero Bubble:

(Galton, Gray, & Rudduck, 2003)

Z Galton et al., 2003 |

- Click on the citation within the bubble to reveal the editing box:

Z Galton et al., 2003

**Transfer and transitions in the middle years of schooling (7-14) : continuities and discontinuities in learning**

Galton et al. (2003), DfES Publications: Nottingham.

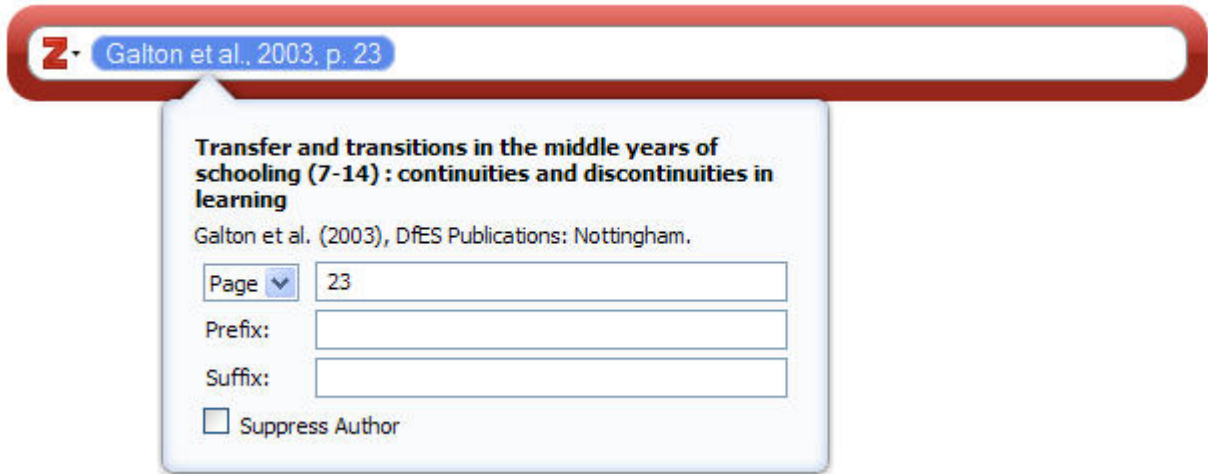
Page

Prefix:

Suffix:

Suppress Author

- Type a page number into the first box. You will see the number appear in the citation in the Bubble:



- Press **Return** on your keyboard.
- Your citation will now appear in your document with page number added:

*(Galton, Gray & Rudduck, 2003, p.23)*



## TASK 16.4: Prefix and suffix added

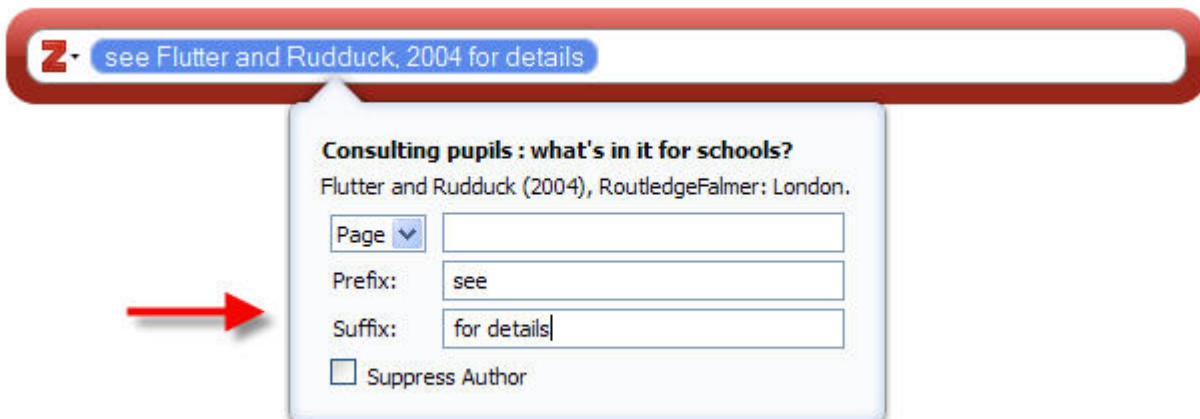
- You can use the Edit function to add further details to your citations as appropriate e.g. **prefixes** and **suffixes**:

(see Cooper & McIntyre, 1996 for details)

- Return to your Word Document.
- Use Zotero to add the citation for Flutter & Rudduck 2004 in the 2<sup>nd</sup> paragraph:

*Practice in more than 50 schools is described and analysed (see Flutter & Rudduck, 2004, for details).*

- Once inserted, place the cursor within the Flutter & Rudduck 2004 citation.
- Click on the Edit button on the Word Zotero tool-bar to reveal the Zotero bubble.
- Click on the citation to reveal the edit dialog box. Add prefix and suffix details (copy this example):



- Press **Return** on the keyboard to insert your edited citation into your document
- You will now see your citation with prefix and suffix details added:

(see Flutter & Rudduck, 2004 for details)

## TASK 17: Create a reference/bibliography list from your citations

- You now have a number of citations in your document. Zotero can quickly create a reference list at the end of your document compiled from these citations.
- Return to your Word Document.
- At the end of your document, type in the heading **References**
- Place the cursor below this heading (on the next line).
- Click the **'insert bibliography'** button on the Zotero tool-bar in Word:



- Watch as Zotero creates a list compiled from all the citations in your document.
- Zotero will update this list as you add more citations to your document. Try adding some more citations now. Click the **refresh** icon in the Zotero toolbar to update your list.
- **NB:** If any of the references in the list appear incorrect, have missing or unwanted extra information or strange symbols, **you will need to return to edit them within your Zotero library within Firefox (see Task 8).**
  - Any changes you make to the original references here (in the right-hand column of Zotero) will appear when you **refresh** your bibliography back in your Word document.
  - A □ symbol in your Word references list is due to an extra/unwanted space back in the original reference entry within Zotero: delete the space to get rid of the symbol.
  - NB: when you generate a bibliography in Word using APA 6<sup>th</sup> as your output style, displayed references automatically include a DOI number (if available). You do not need to delete this information.
  - Citation and reference list display formats will change depending on the citation style you are using (see page 33).
  - To refresh your reference list in order to update changes you've made in your Zotero library, click on the **refresh** button on the Zotero tool-bar in Word:



- Your reference list in your document will now reflect your changes.

**Section 4: Backing up & importing/exporting**

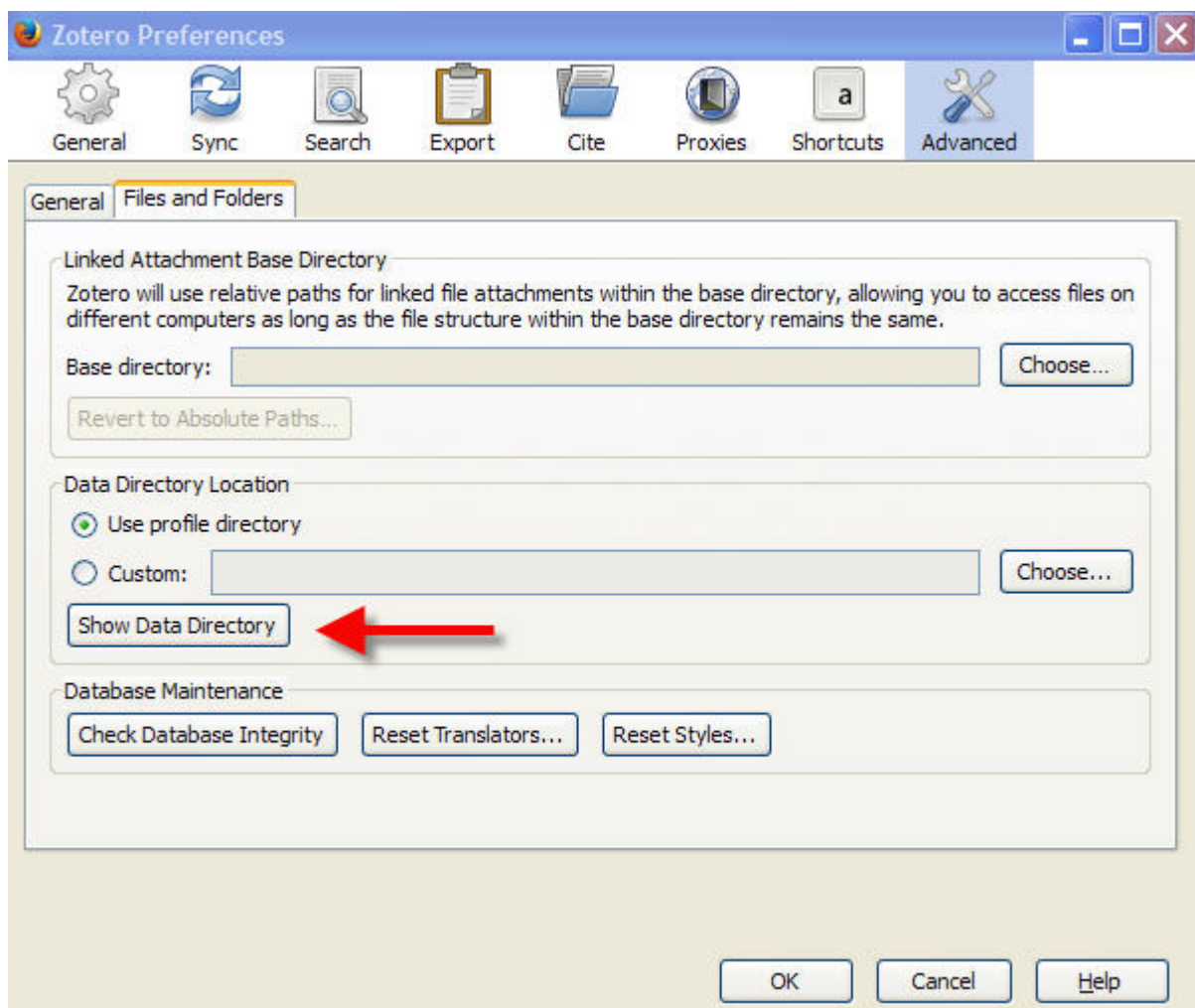
**Tasks 18 – 22**

	<i>Completed</i>
18. Back up your Zotero Library	<input type="checkbox"/>
19. Restoring your Zotero Library from a backup	<input type="checkbox"/>
20. Import & Export References	<input type="checkbox"/>
21. Sync your library online	<input type="checkbox"/>

## TASK 18: Back up your Zotero library

We strongly advise you to learn how to back up your Zotero Library. If your computer breaks down **you will lose all your work if you haven't got a back-up plan**. Use the following information to back up your Zotero library to an external hard drive/USB memory stick.

- First, locate your Zotero Library i.e. the data directory on your computer's hard disk where Zotero stores all your references: go to Zotero Preferences – Advanced Tab (see Task 5).
- Click on the tab **Files and Folders**, then the button 'Show Data Directory'



- Now you can see the Data Directory. **NB:** *do not attempt to open any of these files/folders! They are not meant to be opened.*
- Before you proceed to copy from the Data Directory, **close Firefox**. *This is essential to avoid errors/corrupting files.* But keep the window displaying your Data Directory open.

- Plug in an external storage device to your computer e.g. a USB thumb drive/memory stick.
- Create a new folder on your storage device e.g. 'My Zotero Backup'.
- Copy the files in your Zotero Data Directory to the new folder on your storage device.
- You now have a backup of your library. *If something goes wrong you can restore your Zotero library from this backup. [Task 19]*
- For a more detailed step by step illustrated guide to backing up Zotero see <http://libguides.northwestern.edu/content.php?pid=68444&sid=676064>

**For the full guide visit:**

[http://www.Zotero.org/support/Zotero\\_data#backing\\_up\\_your\\_Zotero\\_library](http://www.Zotero.org/support/Zotero_data#backing_up_your_Zotero_library)

## **TASK 19: Restoring your Zotero library from a Backup**

*You may lose your original Zotero library e.g. when your computer malfunctions, hard drive fails or your computer is stolen. You will also lose your library if you have to reinstall your computer's operating system. Luckily, Zotero allows you to restore your library easily by replacing the contents of your active 'Zotero' data directory with that of your backed-up 'Zotero' data directory (Task 18).*

- Reinstall Zotero from Zotero.org if necessary.
- Restart Firefox, go to Preferences – Advanced – and click the button 'Show Data Directory'
  - This should reveal a directory containing Zotero.sqlite and possibly a 'storage' subdirectory.
- Close Firefox and move Zotero.sqlite and 'storage' from this folder into a temporary folder on your desktop.
- Next, copy Zotero.sqlite and 'storage' from your backup (on your external storage device) into the active data directory folder.
- Restart Firefox. Your Zotero library should be restored.
- Once your data is successfully restored, delete the temporary folder from your desktop.

## TASK 20: Import & Export References

You can transfer your Zotero library or a sub-collection within your main library using the 'export' and 'import' functions.

- Right-click (CTRL-click on Mac) on the collection you want to export. In the dialog box you can select either RIS or Zotero RDF Format.
- Save to your computer.
- Copy the exported file/s to a USB drive and then copy to another computer.
- From Zotero on the 2<sup>nd</sup> computer, click on the gear wheel in the tool bar and select 'Import'.
- Select the file you have just copied over and open it.
- Zotero will now import these references into your library on your 2<sup>nd</sup> PC. The library folder name will be 'Imported' plus the date. You can rename this as you wish (right-click on folder and 'rename collection').

## TASK 21: Sync your library online

- Zotero allows you to ‘sync’ i.e. synchronise your library on your computer with storage space provided by Zotero online.
  - This means you can access your Zotero library from any computer.
  - Zotero has two kinds of syncing:
    - Data Syncing (free, no storage limit)
      - Library items, notes, links, tags – everything except attachment files
    - File Syncing (300mb free with larger storage plans available for purchase)
      - Syncs attached files (PDFs, audio and video files, images etc).
- You can also share your library – great for collaborative research groups!
- NB – you do not need to sync your library online to use Zotero on your computer.
- For full updated details on how to ‘sync’: <http://www.Zotero.org/support/sync>
- **“Warning — Syncing is not a substitute for backing up.** For example, if you accidentally delete items in your library and sync your Zotero library, you won't be able to recover these items from the Zotero server.”
  - If you accidentally delete something you didn't mean to, or corrupt your data in some way, the problematic changes will overwrite the remote copy.
  - We **strongly** advise you to keep backups on memory sticks or CDs in addition to using sync, or arrange a system to backup your entire hard disk automatically.
- Consult the following for advice on troubleshooting sync:

[http://www.Zotero.org/support/kb/sync\\_reset\\_options](http://www.Zotero.org/support/kb/sync_reset_options)

***Make sure you understand which way your files will be copied so that there is no danger of over-writing your latest version.***



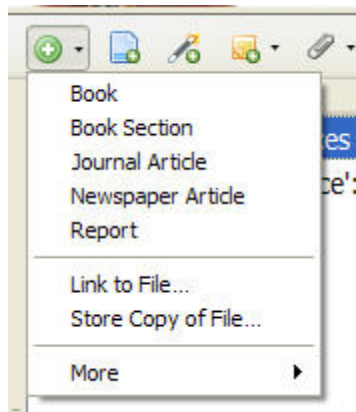
## Section 5: Further Features & Cool Functions

### Tasks 22 – 24

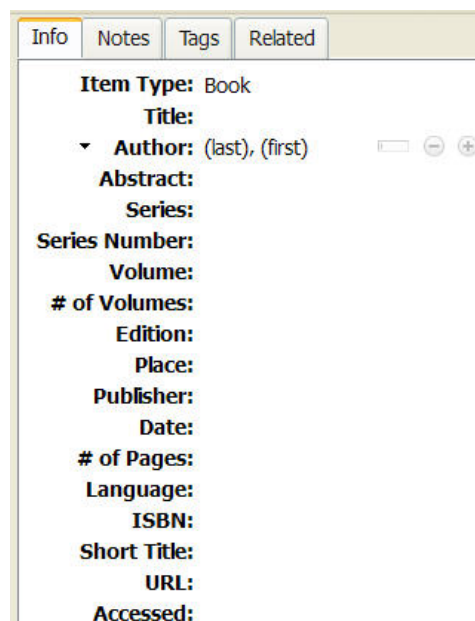
	<i>Completed</i>
22. Create a reference manually	<input type="checkbox"/>
23. Attach a PDF file to a reference	<input type="checkbox"/>
24. View screencast tutorials	<input type="checkbox"/>

## TASK 22: Create a Reference Item Manually

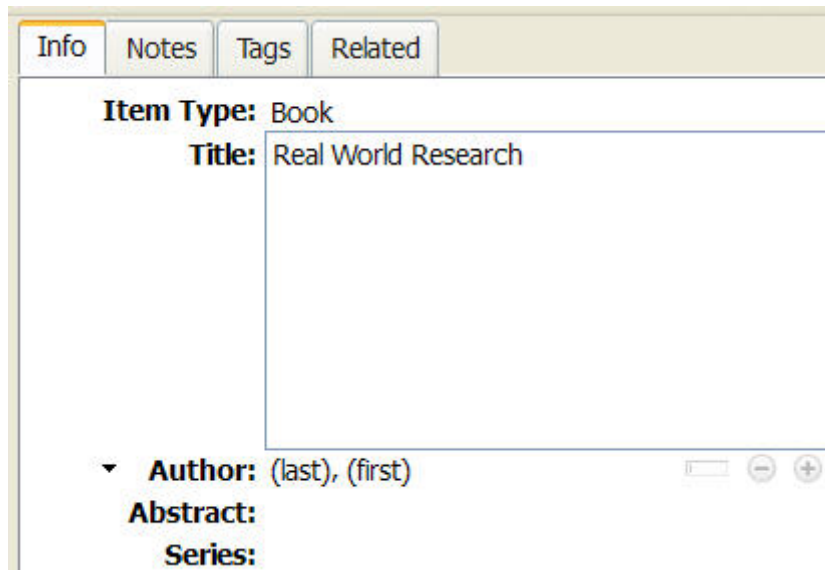
- The easiest way to collect references is to import them from online sources. For some kinds of material this may not be possible. In such cases Zotero allows you to create new references **manually**.
- Zotero will format your new item correctly if you pick the right type of document e.g. book, book section [chapter], or journal article as different kinds of document have to be set out differently in your bibliography.
- In this task you will create a reference for Colin Robson's book *Real World Research* published in 2006 in Oxford by Blackwell.
- Click the green plus icon in the Zotero menu bar. A drop down a list of possible types of reference will appear. *Real World Research* is a **Book**, so select that.



- Now look in the right-hand pane. You will see a corresponding blank item in the library listing.



- Click the **Title** field and type in: Real World Research.



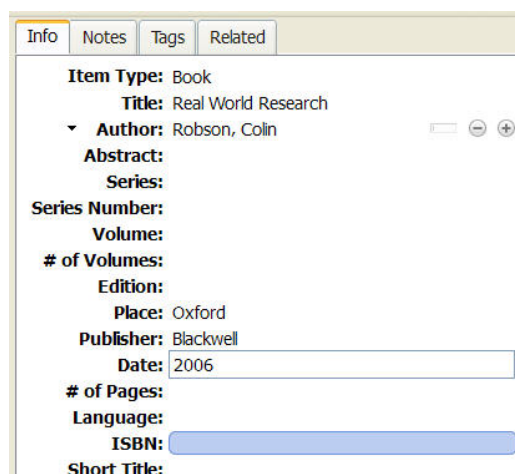
The screenshot shows the 'Info' tab of a Zotero item. The 'Item Type' is 'Book'. The 'Title' field is filled with 'Real World Research'. Below the title, the 'Author' field is labeled '(last), (first)' and is currently empty. Other fields like 'Abstract' and 'Series' are also visible but empty.

- Press Tab (on your keyboard) to skip to the next field: Author
- Enter the Author's name. Press tab to get from the last name slot to first name:



The screenshot shows the 'Info' tab of a Zotero item. The 'Item Type' is 'Book'. The 'Title' field is filled with 'Real World Research'. The 'Author' field is filled with 'Robson, Colin', with 'Colin' highlighted in blue. Other fields like 'Abstract' and 'Series' are also visible but empty.

- Continue filling in the slots for which you have information: **Place** and **Publisher** and **Date**.



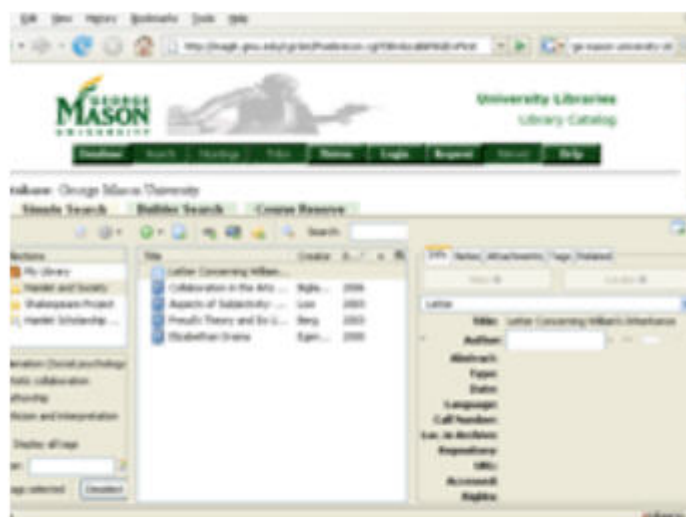
The screenshot shows the 'Info' tab of a Zotero item. The 'Item Type' is 'Book'. The 'Title' field is filled with 'Real World Research'. The 'Author' field is filled with 'Robson, Colin'. The 'Place' field is filled with 'Oxford'. The 'Publisher' field is filled with 'Blackwell'. The 'Date' field is filled with '2006'. Other fields like 'Abstract', 'Series', 'Series Number', 'Volume', '# of Volumes', 'Edition', '# of Pages', 'Language', 'ISBN', and 'Short Title' are also visible but empty.

- Don't worry if some have to be left blank: Zotero provides fields for most eventualities and not every reference will use them all.

## TASK 23: Attach a pdf file to a reference

Zotero allows you to attach a downloaded file to a reference in your library. *To complete this task you will need to have some PDF files on your computer.* If you don't have any, go to an online journal and download a PDF file of an article you are interested in reading.

- Look at the menu bar at the top of the Zotero pane. Roughly at the centre, you'll see a paperclip icon.
- Click the paper clip to pop down its menu and select “attach stored copy of file”.
- Browse to your documents folder and select a PDF that you have saved e.g. a paper downloaded from a journal.
- Click Open.
- Click the small plus sign or arrow beside the reference in Zotero: you will see a pdf icon attached to the reference data.
- Your downloaded PDF has been copied to your Zotero Data directory.
- Right-click (CTRL-click on Mac) the PDF link in Zotero and choose “Rename File from Parent Metadata” to give the PDF a more meaningful name.
- To learn how to retrieve PDF metadata from PDFs you have downloaded from journals, see the screen cast from the Zotero website: [http://www.Zotero.org/support/screencast\\_tutorials](http://www.Zotero.org/support/screencast_tutorials)



### Retrieve PDF Metadata

## TASK 24: View Screencast Tutorials

Zotero has many more useful features. For example:

- Highlighting and Annotation
  - Creating items from webpages
  - Notes
  - Timeline
  - Retrieve metadata from PDF
- Learn more about how to use these features by watching these excellent screencasts on the Zotero website:

### Other Features

<p><b>Highlighting And Annotation</b></p>	<p><b>Manually Creating Items</b></p>	<p><b>Creating Items From Webpages</b></p>
<p><b>Notes</b></p>	<p><b>Timeline</b></p>	<p><b>Retrieve PDF Metadata</b></p>

- Access the screencasts here:

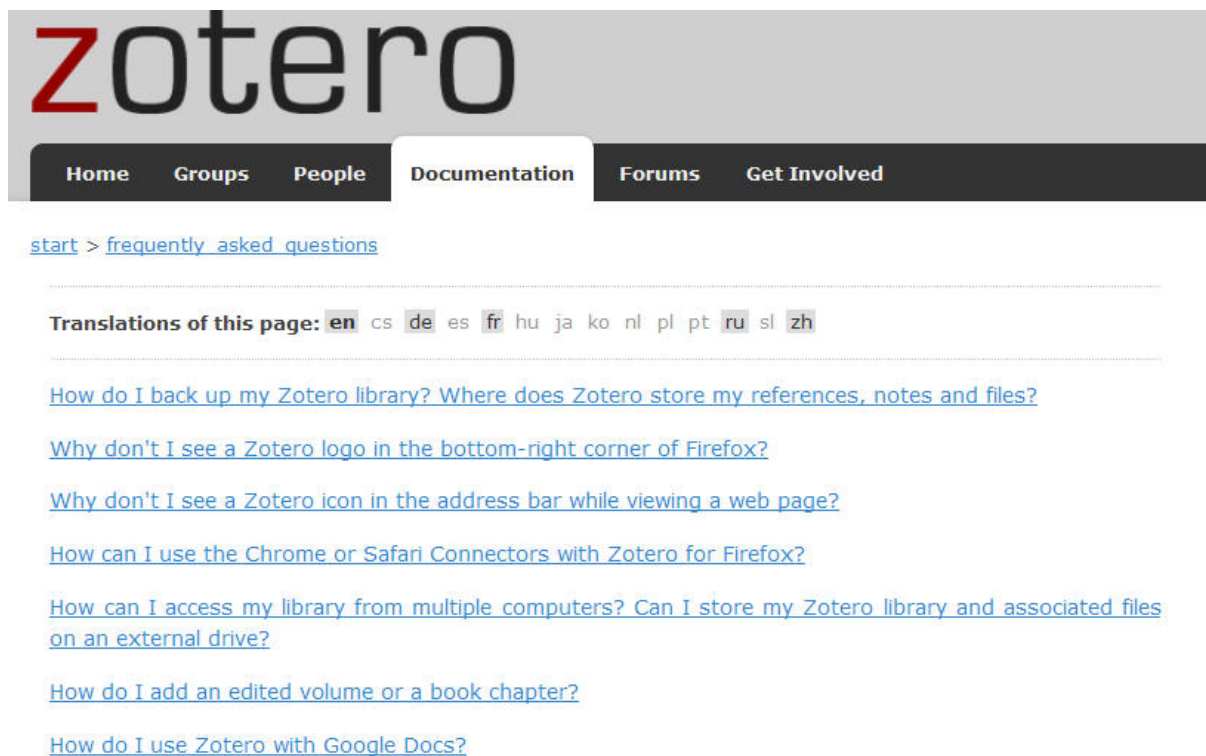
[http://www.Zotero.org/support/screencast\\_tutorials](http://www.Zotero.org/support/screencast_tutorials)

## ZOTERO FAQ

For full FAQ go to the developers' site at:

[http://www.Zotero.org/support/frequently\\_asked\\_questions](http://www.Zotero.org/support/frequently_asked_questions)

All key questions with the latest information are answered on this site.



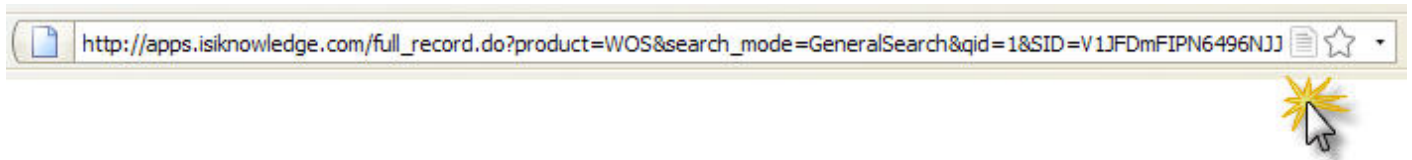
### 1. Transferring/copying references using the Export and Import Functions

You can transfer your Zotero library or a sub-collection within your main library using the 'export' and 'import' functions.

- Right-click (CTRL-click on Mac) on the collection you want to export. In the dialog box you can select either RIS or Zotero RDF Format.
- Save to your computer.
- Copy the exported file/s to a USB drive and then copy to another computer.
- From Zotero on the 2<sup>nd</sup> computer, click on the gear wheel in the tool bar and select 'Import'.
- Select the file you have just copied over and open it.
- Zotero will now import these references into your library on your 2<sup>nd</sup> PC. The library folder name will be 'Imported' plus the date. You can rename this as you wish (right-click on folder and 'rename collection').

## 2. Zotero icon for document in Browser URL bar

When searching other databases (e.g. Web of Knowledge, ScienceDirect) the link to Zotero for an item sometimes appears like a text icon as in the following image:



## 3. My school IT Dept/work are going to upgrade my school/work laptop system. What should I do?



Reinstalling your system software or upgrading to new software (e.g. from XP to Windows 7) will WIPE YOUR ZOTERO LIBRARY FROM YOUR HARD DRIVE. ☹️ Make sure you have backed up your library (see TASK 18) onto a USB pen drive/another computer **before** your laptop is serviced. You can then reinstall it. Also generate a report (TASK 13) and print your bibliography (TASK 14) to ensure you have a paper/hard copy back up of your library and attached notes. If disaster strikes, you can scan this back into a PC using scanning/optical character recognition (OCR) software.

## 4. Why won't Zotero download references from some databases correctly? What is the problem?

Also see information about manually correcting records (TASK 8). An example of this problem is when an author is assigned as a 'contributor' etc. This is an issue with something called 'translators'. Zotero is set up to 'scrape' all the information it can from a library record. The way the library records are set up in the database determine how Zotero will record the details. Annoying as this issue is, it is still quicker to do some editing in Zotero than manually entering all your references from scratch. For further information or to ask the developers questions, check out the extensive Zotero support Forums!

## 5. Is Zotero compatible with EndNote?

Zotero libraries can be exported and imported into Endnote. Similarly Endnote libraries can be exported and imported into Zotero. For instructions, go to:

[http://www.Zotero.org/support/kb/importing\\_records\\_from\\_endnote](http://www.Zotero.org/support/kb/importing_records_from_endnote)

Our trials so far indicate that exporting from Zotero to Endnote works well using Refman RIS as Export format (in EndNote choose File>Import, specify Refman RIS under 'Import option', browse to the file and click OK). However, be aware that using this Output Style to export from Endnote to Zotero seems to lose all the URLs. BibTEX Export.ens works better but the few reference type labels that aren't common between the two softwares get lost, eg. government documents get categorised as books.



**PRACTICE TEXT FOR TASK 15**

**Transfer and Transitions in the Middle Years of Schooling (7-14): Continuities and Discontinuities in Learning**

The project was concerned with factors that affect pupils' progress between the ages of 7 and 14 (Rudduck, 1994). As mentioned by Rudduck & McIntyre (2007), we start by considering the primary side of the transfer divide, move on to the transfer to secondary school, and then explore some areas where schools intervene when progress stalls (Flutter & Rudduck, 2004). Taking the long view has enabled us to build a fuller picture of pupils' progress and also to redress the imbalance in earlier research which focused on transfer between schools rather than transitions between years within the same school (Galton, Gray & Rudduck, 2003, p.23).

Practice in more than 50 schools is described and analysed (see Flutter & Rudduck, 2004, for details). The project builds on an earlier review (Rudduck, 1994) which highlighted the need to understand more about 'dips' in attitude, engagement and progress at key transition points and the post-transfer period (Galton et al, 2003; Rudduck & Flutter, 2004).