Alfred Health Library Service

Introduction to Zotero 7.0

Training Notes (ver 1)

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HELP?

• The Help function can also provide assistance by clicking on Help on the menu.

1. INSTALLING ZOTERO

Zotero is a free bibliographic referencing program, which can be download from <u>www.zotero.org</u>. Zotero includes three elements:

- The Zotero program for Windows or MAC
- Zotero Connector plugin for Google Chrome, or other browsers
- MS Word Add-in Zotero Toolbar

Generally all three parts will be automatically installed at setup. If the Word toolbar is not working, this can be reset under the Zotero preferences > Cite.

2. MANUALLY INPUTTING REFERENCES

Although it is much faster to input reference data using bibliographic databases or using the Zotero connector, sometimes references from books or journals will need to be typed (or edited) in your Zotero library manually.

- 1. Click the page+ icon; or File> New Item
- 2. Select type of reference from the pull-down box, Journal Article or Book are the most commonly used.
- 3. For example type in the following Journal Article

🗟 Info	^	-
Item Type	Journal Article	Ø
Title	Trends in incidence and outcome of stroke in Perth	D
Author	Islam, M.S.	輡
Author	Anderson, C.S.	\bigcirc
Publication	Stroke	ଡ
Volume	39	
Issue	3	(<i>⇒</i> ĵ
Pages	776-782	
Date	2008	

TIP: When entering Author names with initials, follow each initial with a full-stop, ie Anderson, C.S.

Zotero fields used for Book references

🗟 Info	^	
Item Type	Book	Ø
Title	Basic epidemiology	
Author	Bonita, R.	輡
Author	Beaglehole, R.	\bigcirc
Author	Kjellstrom, T.	ଡ
Series		
Series Number		Ð
Volume		
# of Volumes		
Edition	2nd	
Place	Geneva	
Publisher	World Health Organization	
Date	2006	

Reference in bibliography when formatted for Vancouver (superscript) style:

1. Bonita R, Beaglehole R, Kjellstrom T. Basic epidemiology. 2nd ed. Geneva: World Health Organization; 2006.

Reference in bibliography when formatted for **Monash - Harvard** style: Bonita R, Beaglehole R and Kjellstrom T (2006) Basic epidemiology, 2nd edn, World Health Organization, Geneva.

Reference in bibliography when formatted for **APA (7th ed.)**: Bonita, R., Beaglehole, R., & Kjellstrom, T. (2006). Basic epidemiology (2nd ed.). Geneva: World Health Organization.

Please note: Zotero does <u>not</u> have a format for **Webpage** which can be selected from the pull-down for manual entry of web references. Instead you will need to use the Zotero Connector to extract reference data when browsing webpages. Section 4 explains how to use the Zotero Connector.

3. CHOOSING OUTPUT STYLES

Your referencing style can be selected by either the Zotero program or via the Word toolbar.

- **Zotero program**: >Edit (Windows) > Settings>Cite >Styles and choose your style, or follow link to *Get additional styles*
- Word Zotero toolbar >Document preferences > Choose preferred style from pull-down menu

How to quickly see a formatted reference for a selected Output style

Zotero <u>does not display</u> the formatted references within the Zotero program window. The easiest way to do a quick check of the output that would appear in your bibliography is to highlight a specific reference in your display list, do a right-hand click and select Create Bibliography from Item

> 🖹 HIV Preexposure Prophylaxis C	Holt et al.	2020	Journal of Acquired Immune Defici	ency Syndromes (1999)	
> 🖹 How to measure blood pressu	Saugel et al.	2020	Critical Care (London, England)		1
E Identifying the genetic associa	Zhao et al.	2024	Skin research and technology : off	 Open PDF in New Tab Open PDF in New Window 	et
> 🗟 Investigation of Best Practices	Lausen et al.	2023	Toxins	View Online	1
> 🖹 Jellyfish from Fisheries By-Catc	D'Ambra an	2022	Marine Drugs	Show File	-
Eadership in women's health:	Barbour	2024	Medical Journal of Australia	Add Note	-
> 🗟 Lifestyle behaviour changes as	Ng et al.	2024	Scientific reports	Add Note from Annotations	-
Elimited Sustained Local Trans	Di Giallonar	2019	Viruses	Add Attachment >	1
E Lingzhi or Reishi Medicinal Mu	Ratnaningty	2024	International journal of medicinal	Ca Add to Collection >	
> 🖹 Localization of Multiple Jellyfis	Klompen et al.	2023	Toxins	" √" Duplicate Item	
Medicare-funded reproductive	Rogers et al.	2024	Medical Journal of Australia	Move Item to Trash	-
🐑 Full Text PDF				.↑. Export Item	
> 🖹 Methotrexate for juvenile idio	Tan et al.	2024	The Cochrane database of system	j ⊂ Create Bibliography from Item	
E Midterm Results after Tibiotala	Kim et al.	2024	Clinics in orthopedic surgery	Generate Report from Item	
District and the Research for	to both at	2024	taken all and the set of a second state		

Then from the pop-up dialogue box select Output mode: Bibliography and Output Method: Copy to Clipboard, click OK.

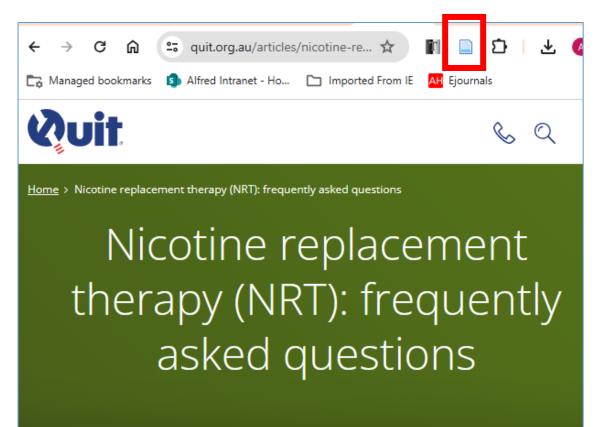
			Mar	age Styles
Language: Eng	glish (US)	~		
Output Mode:				
○ Citations				
Bibliography				
Output Method:				
\odot Save as RTF				
O Save as HTMI	-			
Copy to Clipb	oard			
○ Print				

Then paste the copied reference into Notepad (Windows) or TextEdit (MAC):

Thritled - Notepad -	×
File Edit Format View Help	
1. Saugel B, Kouz K, Meidert AS, Schulte-Uentrop L, Romagnol How to measure blood pressure using an arterial catheter: a systematic 5-step approach. Crit Care. 2020 Apr 24;24(1):172.	^

4. USING THE ZOTERO CONNECTOR

When browsing online resources the Zotero connector plugin can detect documents, article pdfs and webpages and send reference data through to your library. For website information the Zotero icon turns to a pale blue symbol. After clicking on the symbol the **Zotero Item Selector** will appear, and allow you to choose which collection to use. It is important to check what information is actually retrieved, and correct the data if necessary.



🔓 Info	~
Item Type	Web Page
Title	Nicotine Replacement Therapy (NRT) - What is NRT?
Author	(last), (first)
Website Title	Quit
Website Type	
Date	
Short Title	
URL	https://www.quit.org.au/articles/nicotine-replacement
Accessed	8/26/2024, 1:39:02 PM
Language	en
Rights	
Extra	
Date Added	8/26/2024, 1:39:02 PM

In the example above the subtitle of the downloaded title is incorrect and would need to be corrected, and the author Quit Victoria needs to be input into the author field, and removed from the Website title. After making those changes, the cited bibliography reference would format in the Vancouver style as:

 Quit Victoria. Nicotine Replacement Therapy (NRT): frequently asked questions [Internet]. [cited 2024 Aug 26]. Available from: https://www.quit.org.au/articles/nicotine-replacement-therapy-frequently-askedquestions

When using a library catalogue, ejournals or health information databases the icon of the Zotero Connector will change to represent that resource. Ejournals, catalogues and ejournals can allow multiple items to be selected using the Zotero Item Selector. Free PDF's will also be automatically downloaded.

PubMed (pubmed.gov) works well with Zotero Connector.

gov/?ter	m=tobias+stroke+surveillance+2007 🖈 🛐	<u>ک</u> 🖻
Import	ted From IE 🛛 Ejournals 🔊 XE Converter 💪 Google 🚏 Resource Scheduler 📀 RSr Admin	
rnment <u>H</u>	lere's how you know.∽	
	Medicine	Log in
nnoiogy		
tobias	s stroke surveillance 2007 X	earch
Advance	d Create alert Create RSS	User Gu
Save	Email Send to Sort by: Best match 🖨 Display o	ptions 🖁
2 results	K C Page 1 of 1	>
	- .	
	Stroke surveillance: population-based estimates and projections for New Zealand.	/
Cite	Tobias M, Cheung J, Carter K, Anderson C, Feigin VL.	
Share	A Z Zotero Item Selector — 🗆 🗙	
	^P Select which items you'd like to add to your library: R	of
	 Stroke surveillance: population-based estimates and projections for New Zealand. Odanacatib for the treatment of postmenopausal osteoporosis: results of the LOFT multicentre, randomi 	tmost
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	C	he
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Cite		vallari I
Share	B	tales JA
	R Select All Deselect All Cancel Ok	lassaad
	R Select All Deselect All Leung AT, Kaufman KD, Sabatine MS; LOFT Investigators.	⊔]A,
1	Leang Ai, Rauman RD, Jabaune MD, LOTT Investigators.	

If the Zotero Connector gives the error message "An error occurred while saving this item", you will need to download references in the RIS format, and then import the file into Zotero. This is explained in the next section.

5. IMPORTING REFERENCES (USING RIS FORMAT)

Databases and ejournals will generally provide a method to download citations as a file. When using Zotero it is important to choose the **RIS** (or "Refman") format option. For instance, when exporting citations from **Ovid Medline** change the format to RIS, and fields to Complete Reference, and export.

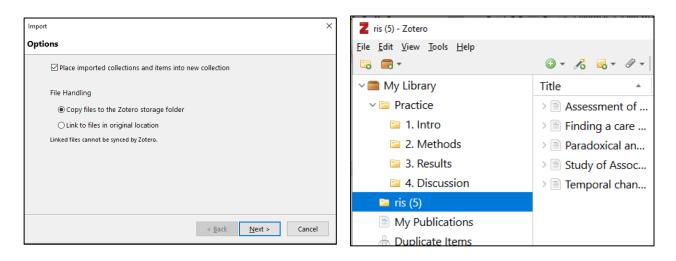
合 Print 🖂 Email 한 Export 🗊	× Export Citation(s) 5 Selected: 1-5
Range Results per page Go All Ex: 1-4, 7 Clear View: — = = = 10 ✓ ✓ 1. Paradoxical and bimodal immune-mediated dermatological side effects of TNF-alpha inhibitors: A comprehensive review. [Review] Behrangi E, Moodi F, Jafarzadeh A, Goodarzi A Skin Research & Technology. 30(5):e13718, 2024 May.	Default Custom Format RIS Fields Complete Reference Includes Link to External Resolver URL Search History
	Cancel Export

Then from Zotero go to File > Import > select the A file option and click Next

Import		×
Where do you want to im	port from?	
A file (BibTeX, RIS, Zo	tero RDF, etc.)	
O Mendeley Reference	Manager (online import)	
Import		
← → ~ ↑ ↓ >	This PC > Downloads	
Organize 🔻 New fo	lder	
This PC	Name	Date m
3D Objects	∨ Today (2)	
C Desktop	👫 ris (5).ris	15/05/2
Documents	10.1007_s00261-024-04297-6-citation.ris	15/05/2
🖊 Downloads	✓ Yesterday (4)	

Select the RIS file you wish to import from your downloads folder and click Open, and then on the next Zotero dialogue box select the options you want and click Next to import the records into Zotero. If the **Place .. into new**

collection option is ticked, Zotero will not file the new references into any specific collection. The references will be filed into a temporary "ris" collection which allows for viewing, filing, and then deletion of the "ris" collection.



6. PDF's

PDF's and ATTACHMENTS

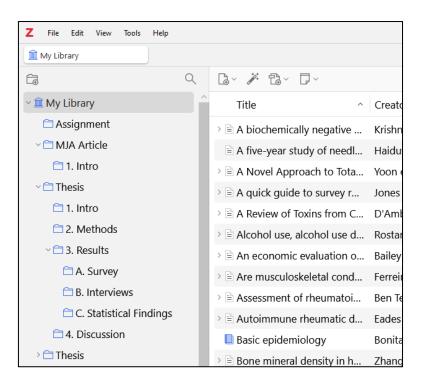
If you wish to link references to PDF's (or other document types), this can be done manually by highlighting a reference in Zotero and right-hand clicking and selecting from the pull-down **Add Attachment** > File.

G~ 🗡 🛱~ 🖓				Q, ∽ Title, Crei
Title ^	Creator	Year	Publication	
Finding a care plan that suits e	Capon	2024	The Veterinary	/ record
> 🔤 Folder: EBSCOhost				
🖶 Full Text				
🗂 Full Text				
🖱 Full Text PDF				
> 🖹 Gastrointestinal stromal tumor	Nishida et a	al. 2009	Gastric Cancer	r
> 🖹 Health literacy and older adult	Fry et al.	2024	Health promot	tion journal of Australia : official journal of Australian .
> 🖹 Health professionals' practices	Ingram et a	l. 2024	Brain impairm	ent : a multidisciplinary journal of the Australian Socie
E HIV Preexposure Prophylaxis C	Holt et al.	2020	Journal of Aco	uired Immune Deficiency Syndromes (1999)
$^{\scriptscriptstyle >} \ensuremath{{\scriptstyle \cong}}$ How to measure blood pressu	Saugel et	Wiew Online		ndon, England)
> 🖹 Identifying the genetic associa	Zhao et al	🗇 Add Note		nd technology : official journal of International Societ
▷	Lausen et	Add Attachm	nent >	🗅 File
> 🖹 Jellyfish from Fisheries By-Catc	D'Ambra a	Find Full Text		Contract Linked File
Eadership in women's health:	Barbour	🗟 Add to Collec	ction >	C Web Link
> 🖹 Lifestyle behaviour changes as	Ng et al.	"\" Duplicate Iter	m	s
E Limited Sustained Local Trans	Di Giallon	🗍 Move Item to	Trash	
> 🖹 Lingzhi or Reishi Medicinal Mu	Ratnaning	① Export Item		urnal of medicinal mushrooms
> Localization of Multiple Jellyfis	Klompen e	😑 Create Biblio	graphy from ltem	

Also available in the pull-down is **Find Full Text**, which will search for available PDF's for download. A small pdf ICON will appear on the right-hand side of records when a pdf is attached. By double-clicking on a listed reference the article pdf will appear for reading and making notes.

7. COLLECTIONS

References in your Zotero library can be organised by creating Collections, and then adding or moving references by dragging and dropping. Collections can be organised by topic, or into parts of a document project. Create a collection by clicking on the folder+ icon. Subcollection folders can also be created within collection folders using the right-hand click Deleting references from collections does not remove references from the main Library.



When using the Zotero Connector you can indicate which folder you want to file downloaded references, and later when writing documents in Word, references to cite can also be displayed at the Collection level.

Saving to 2. Methods	•
Filter Collections	
My Library Therein	*
 Thesis 1. Intro 	
📔 2. Methods	
3. Results	
4. Discussion	
practice	
	-
Tags (separated by commas) Done	
Are musculoskeletal conditions neglected in natio	
📄 PubMed entry	
A quick guide to survey research	
PubMed entry	

8. NOTES

Notes for a specific references in a Zotero library can be created either by highlighting a reference and clicking on the Notes tab on the right-hand panel, or when reading pdfs, clicking on the Notes icon.

🗟 Info	^	Ø					
Item Type	Journal Article						
Title	A Novel Approach to Total Ankle Arthroplasty with Simultaneous Structural Tibial Cut Autograft	٩ ٩					
	for Anterior Tibial Bone Defects.	\sim					
Author	Yoon, Yeo Kwon	୍ଷ					
Author	Park, Kwang Hwan	(\rightarrow)					
Author	Shim, Dong Woo	C+					
A Novel Approach to Total Ankle Arthroplasty with Simultaneous Structural Tibial Cut Autograft for Anterior Tibial Bone Defects.							
7 1 Note		+ ^					
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🕞 Article mer	ntioned by Professor Stone.						

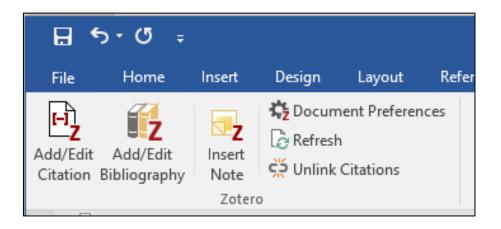
The presences of notes and other attachments like pdfs will be listed under references. These can be viewed using the right-hand panel.



9. USING ZOTERO WITH MICROSOFT WORD

When Zotero is installed on a computer, a Zotero toolbar is added to Microsoft Word. Icons are available to **Add/Edit Citation** into the document text, and **Add/Edit Bibliography** to format at the end of a document.

Other important icons are **Document Preferences** to select or change the referencing style, **Refresh** to update the Bibliography, and **Unlink Citations** to remove field codes.



Class Exercise :

Document

Although stroke rates appear to be decreasing,¹ population ageing will intensify the disease and the need for effective management strategies.²

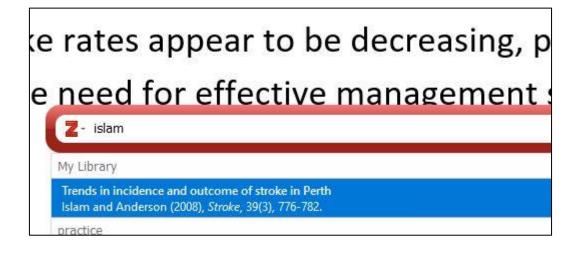
Bibliography

1. Islam MS, Anderson CS, Hankey GJ, Hardie K, Carter K, Broadhurst R, et al. Trends in incidence and outcome of stroke in Perth, Western Australia during 1989 to 2001: the Perth Community Stroke Study. Stroke 2008;39(3):776-82.

2. Tobias M, Cheung J, Carter K, Anderson C, Feigin VL. Stroke surveillance: population-based estimates and projections for New Zealand. Aust N Z J Public Health 2007;31(6):520-5.

STEPS TO USING ZOTERO WITH WORD

- **1.** Use the Document preferences to set citation style.
- 2. Position cursor where you want an in-text citation placed.
- **3.** Use **Add/Edit Citation** icon to open the red Zotero citation manager. To find a reference to cite enter name or title words. Select required reference(s) from blue suggestions. This also allow you to edit citations.



4. Insert the citation into the document by clicking on the right-hand arrow inside the red citation manager.

Document

Although stroke rates appear to be decreasing,{Citation} population ag intensify the disease and the need for effective management strategies



5. Type **Bibliography** at the end of your document. Place cursor below Bibliography heading, and click on the **Add/Edit Bibliography** icon.

APPENDIX

A. ZOTERO AND SYNCING YOUR LIBRARY

Zotero users have the option to create a **Zotero.org** account, which is very useful as a backup of your library, and also if you use a number of devices.

Syncing can be switched on by setting up the syncing setting in Preferences.

Zotero Prefere	ences					
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Settings Res	et					
Data Sync	ina					
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	Choose	Libraries				
	Sync :	automatically	4			
	_ ,	ull-text cont	·			
	About Syn					
File Synci	ng					
Sync a	attachment fil	es in My Lib	rary using	Zotero	1	
D	ownload files	at sync tim	e ~			
Sync a	attachment fil	es in group l	ibraries using	g Zotero stor	age	
D	ownload files	at sync tim	e ~			
By using 70	otero storage,	you agree to	become boy	und by its tar	me and condition	

B. PREFERENCES

Suggested settings in Zotero Preferences:

Use MEDLINE journal abbreviations

General > Miscellaneous > turn automatic tagging	OFF				
Sync > Sync automatically	ON				
Cite > Style Manager > Vancouver (superscript)					
Cite > Citation Options > Include URLs	OFF				
Suggested setting in Word Zotero Toolbar Document Preferences:					
Advanced options					

ON