



Faculty of Engineering
and Applied Science

REFERENCING IN ZOTERO

While Microsoft Word is, for most PC users, an essential tool for composing documents, it does not have all the features that might be required for technical writing. Much like Grammarly is a better proofreading tool than Microsoft's built-in option, Microsoft's referencing capabilities are not as advanced as dedicated citation management software. This document illustrates how to use Zotero, a popular bibliographic management tool. It also covers how to transfer the Zotero references into Microsoft Word.

GETTING STARTED: INSTALLATION

Zotero, an open-source citation management tool, is not installed by default on any machine. It must be downloaded from their webpage. Going to <https://www.zotero.org/>, a download link should be present on the main page.

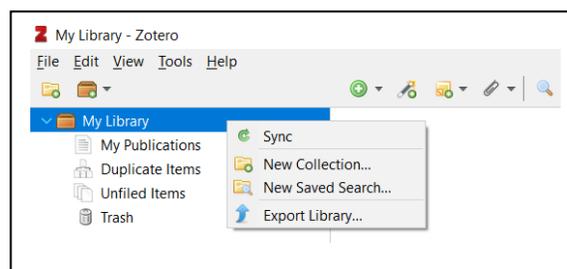
Clicking on the link, you will be taken to a page showing two downloads: a desktop tool and a browser add-on.



It will automatically detect your operating system and browser. Zotero is compatible with Windows, macOS and Linux operating systems. It can be integrated into many browsers, including Chrome, Firefox, Safari, and Edge. Installing both will allow for the most seamless experience.

GETTING STARTED: SET UP

Once installed, you should set up a collection. Right-click on My Library, and then select New Collection.



The named collection will appear under the My Library folder. If desired, you can right-click on your new collection and create sub-collections within that collection, but a single collection should be fine in many cases.

ADDING ITEMS

There are three ways to add items to your collection. They are listed from most to least difficult.

MANUALLY ADDING

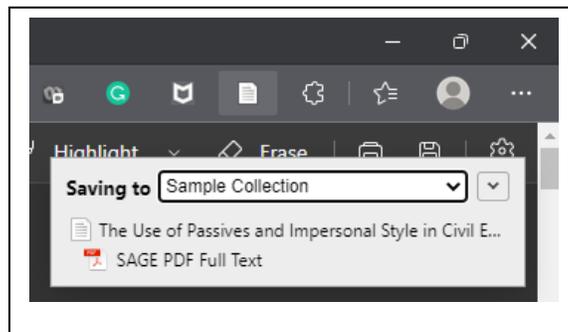
Clicking on the green plus icon (New Item) will open a drop-down menu. From here, you can select the type of source that you would like to add (book, journal article, newspaper article, etc.). This will open a pane on the right side of the screen where you can manually add all the information about the source that you have.

USING IDENTIFIERS

Next to the New Item button is a magic wand icon. This allows you to add items by an identifier. The identifier might be an ISBN (for books), a DOI (for digitally-published documents), or an arXiv (like a DOI but for open-source documents only). Copy and paste the identifier into the text entry box, and the information about your source should auto-populate. In many cases, this method will retrieve more information than if a source was manually added. Using this method will also cause the digital files (e.g., PDFs) to be downloaded directly to your Zotero if the file is available.

USING ZOTERO CONNECT

This method involves using the browser instead of the desktop app. When you open your source, you will see the Zotero Connect icon. Note that this icon changes depending on the type of file you are viewing.



Select the collection where you would like to save it. Doing so should result in the digital file being added to your library if one exists. If it is a website, you may see a blue dot under the Attachments column. Because there is no file to download, it takes a snapshot of the website instead.

MANAGING CITATIONS

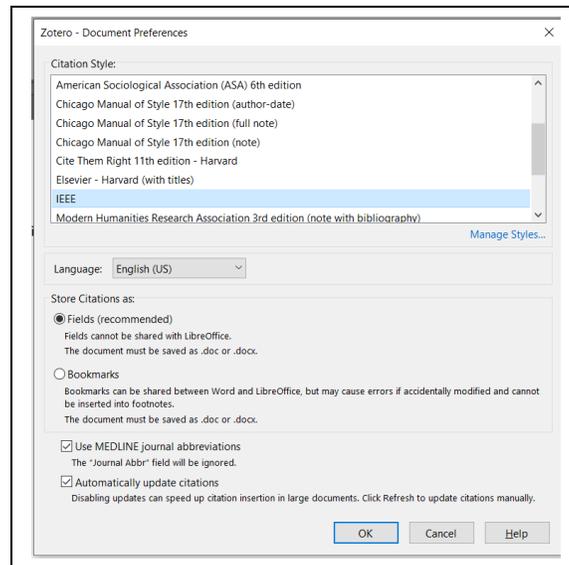
In some cases, you might need to add data to a source. Going to the right pane, you can click any existing or blank piece of information to change or enter information. If a source is listed multiple times, you can select each one and right-click to merge them. Be sure to select the listing with the most information entered to replace the duplicates.

If desired, tags can be added to a source in the bottom-left corner. These tags add keywords to the source to help categorize it, which might be useful if you are trying to remember where/how you had intended to use this source in your paper.

USING ZOTERO IN MICROSOFT WORD

Once you have your collection of sources, you will likely want to bring these citations over to Microsoft Word. If the program has been installed correctly, your Microsoft Word should contain a dedicated Zotero tab. The first time you click on it, you will be asked to select the citation style that you would like to use. There are a variety of citation styles,

but the choice of which to use is typically made by someone else (e.g., instructor, journal editor, employer). These document preferences can be changed by clicking on the Document Preferences button under the Zotero tab.



Adding citations is simple. Click where in the document you would like the citation. Then click the Add/Edit Citation button. A text entry box will appear. Start writing the name of the author (or another field) and matching records from your list of sources will appear. Clicking on the source will prepare a citation in the selected format. Hit enter after the citation is displayed in the text entry box to insert it.



The cursor position matters when inserting citations. In most cases, citations appear before punctuation marks like periods or commas. Make sure the cursor is placed exactly where you want the in-text citation to appear. If necessary, the in-text citations can be edited just like text within the document.

Once the citations are completed, you can add a bibliography using that button in the Zotero tab. It will create a list of references using the citations that you have used in the document. Note that, despite the name, the list only includes references that were cited in the document. Any other sources that you have in your collection but have not cited directly will not appear in the resulting reference list. The list of references that is created will also need a heading. If you add or remove references or if you edit the information in Zotero, you can click the Refresh button (under Document Preferences) to update your reference list.

OTHER CITATION MANAGEMENT TOOLS

The QEII Library has a [comprehensive table](#) comparing some popular citation managers. Officially, there is no recommendation for one specific tool. Listings from the university library allow the export of citations in a number of formats. The following are other citation management tools:

- [Mendeley](#)
- [EndNote](#)
- [RefWorks](#)