



UWest Library

Zotero Reference Manager



Photo: <https://pixabay.com/en/library-sky-birds-mystical-clouds-425730/>



What is Zotero?

Zotero [zoh-TAIR-oh]

is a

**non-profit, open source, free & easy to use
reference manager to help you**

collect, organize, and cite

your research sources.

Download at

<http://www.zotero.org>



Zotero: Collect, Organize & Cite

- **Collect:** Provides multiple ways to quickly add bibliographic data (to be used in your citations) into the software.
- **Organize:** Place entries into separate collections, add notes, add files, search within the entries.
- **Cite:** Provides formatted in-text citations (such as footnotes in Chicago Manual of Style) based on the entries and automatically creates a bibliography from the footnotes.
- Here's a quick 4 minute demo: <https://youtu.be/MosaefbcAqg>



Installation Specifications

- The features of Zotero are best when used in conjunction with

1. Any compatible web browser.
2. Any compatible word processor.



A vertical list of four browser connectors with their respective logos and 'Install' buttons: Firefox connector, Chrome connector, Safari connector, and Edge connector.

Microsoft Word
Downloadable software

Google Docs

LibreOffice
Computer application

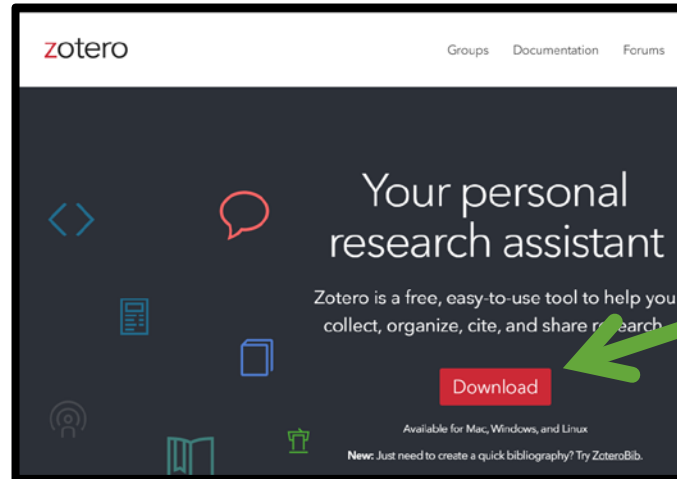
LibreOffice



Installation

2 Part Install

Go to: <http://www.zotero.org> with a compatible browser (see previous slide)



Part 1:

Install the Zotero program for your computer.



Part 2:

Install the connector for the compatible browser.

It should auto-detect the browser you are using.



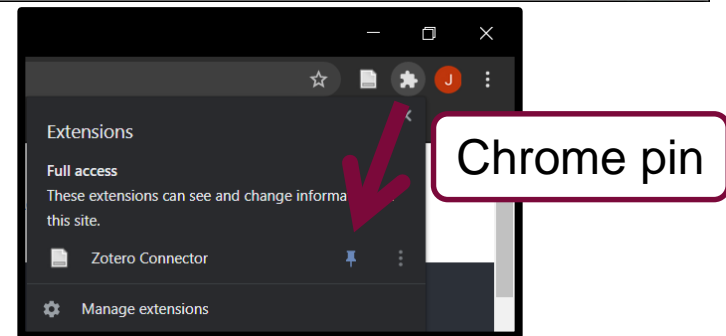
Installation Verification

- If you installed everything correctly, you should see these three indicators:

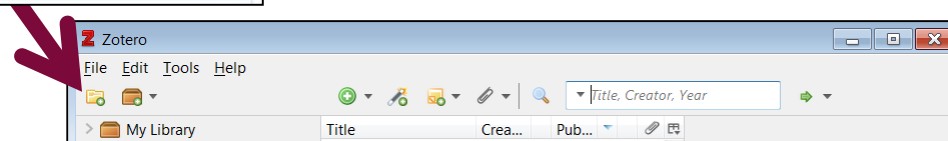
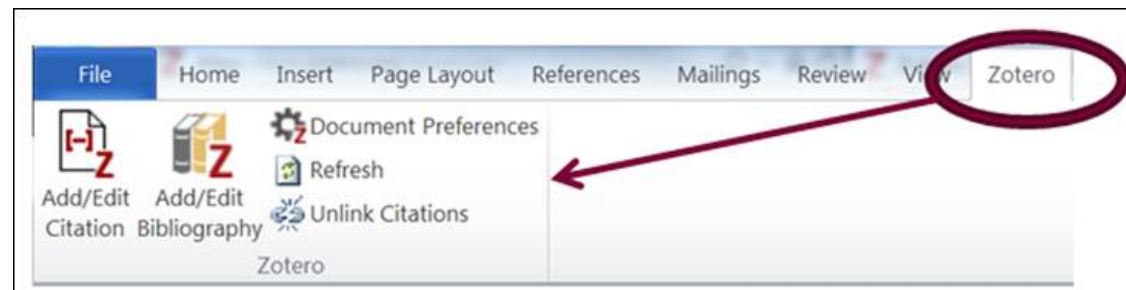
1) A blue book icon somewhere on the menu of your browser when you go to the following page:
<https://uwest.on.worldcat.org/oclc/723141626>. Chrome might tuck it in your extensions, you can pin it.



2) When you open a blank document in your word processor, you should have an extra Zotero tab on the menu.



3) You should find the Zotero program on your computer. Upon opening it, you should see the 'My Library' box at the left.





Collect Web Translators

- ‘Translates’ information on the website into citation data to create your in-text citation and bibliography.

The screenshot shows a web browser window displaying a JSTOR article. The browser's address bar shows the URL: jstor.org/stable/41349951?Search=yes&resultItemClick=true&searchText=religion&.... A green arrow points to a citation icon (a document with lines) in the browser's toolbar, which is circled in green. The page content includes the JSTOR logo, a search bar, and the article title: "Baring Their Souls in Online Profiles or Not? Religious Self-Disclosure in Social Media" by Piotr S. Bobkowski and Lisa D. Pearce. The article is from the *Journal for the Scientific Study of Religion*, Vol. 50, No. 4 (DECEMBER 2011), pp. 744-762 (19 pages). The page number "1 of 19 pages" is visible in the top right corner of the article content area.



Collect Web Translators

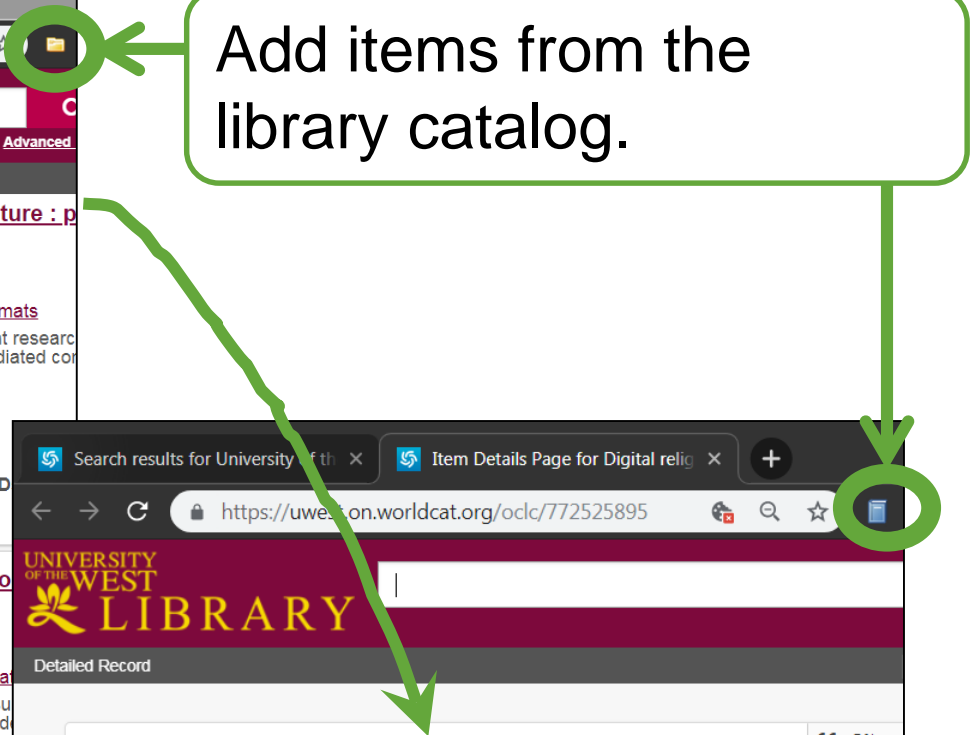
Search results for University of the West Library. Search term: digital religion. Results list two books:

- 2. **Digital religion, social media, and culture : perspectives, practices and futures** by [Pauline Hope Cheong](#). Available. Location: Main BR115.C65 D
- 3. **Digital religion : understanding religious worlds** by [Heidi Campbell](#). Available. Location: Main BL638 .D54 2

Filters on the left include Format (All Formats, Article, Chapter, Downloadable Article, Article, Book, eBook, Video), Databases (All Databases, WorldCat.org), and Author (All Authors, Films For The Humanities & Sciences, Infobase, Pirenne Delforge, Vinciane, Vidal Daniel, Motte Andre).

Add items from the library catalog.

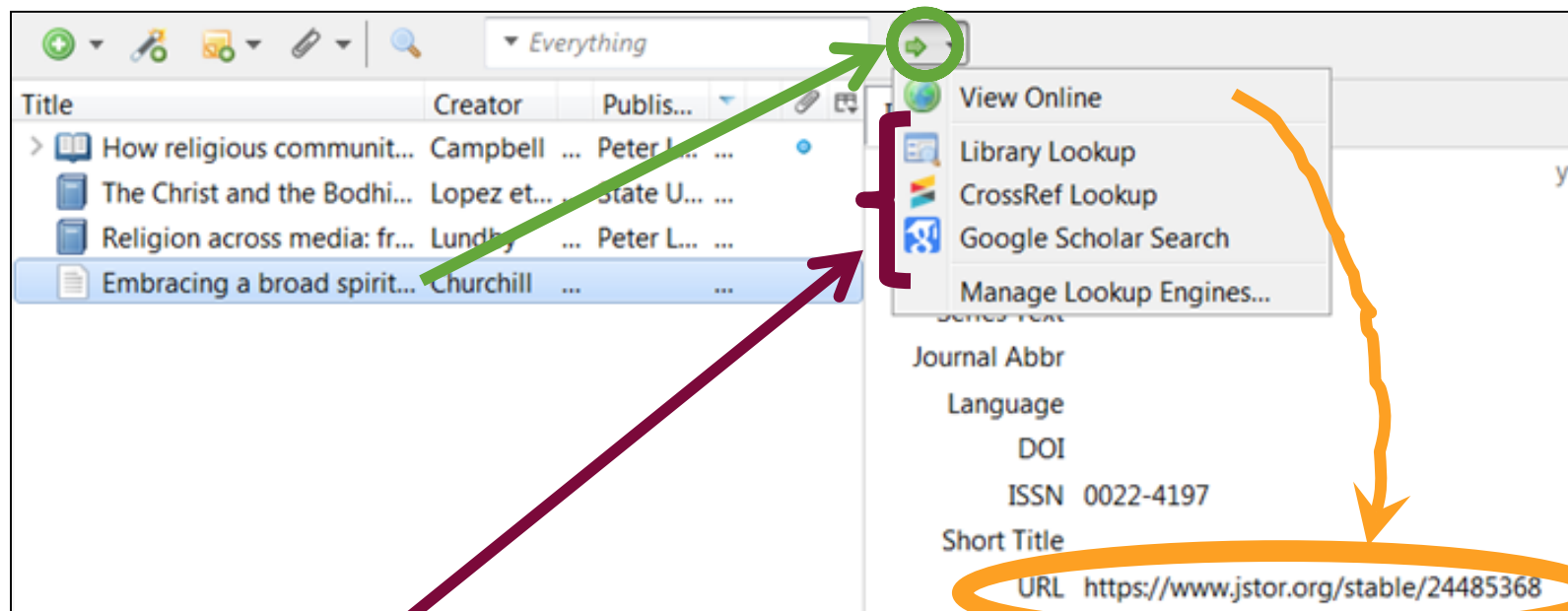
Item Details Page for Digital religion, social media, and culture : perspectives, practices and futures. Author: [Pauline Hope Cheong](#). Print Book ©2012. Held by University of the West Library.





Collect Web Translators

- When you add an entry with a web translator, it automatically adds the website URL, so you can go back to the same website where you used the web translator:

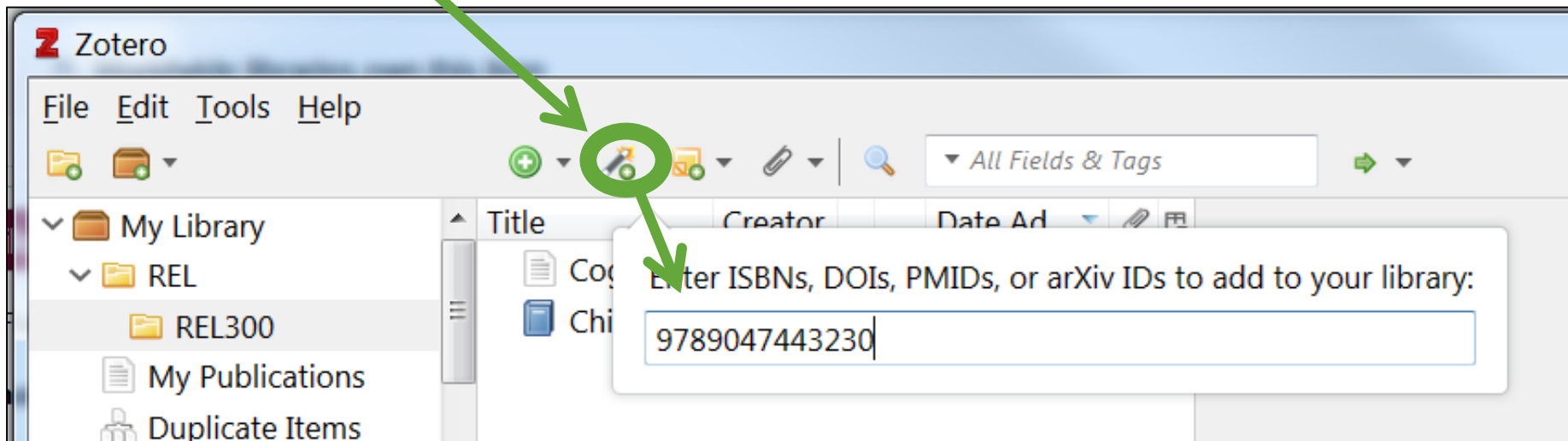


If the website where you found the citation doesn't have the full text, and you would like to find the full text, try **Library Lookup** (it will allow you to search UWest library) or **Google Scholar Search** (it will search in free repositories and websites).



Collect Magic wand

- Add item via ISBN, PubMed ID and DOI:



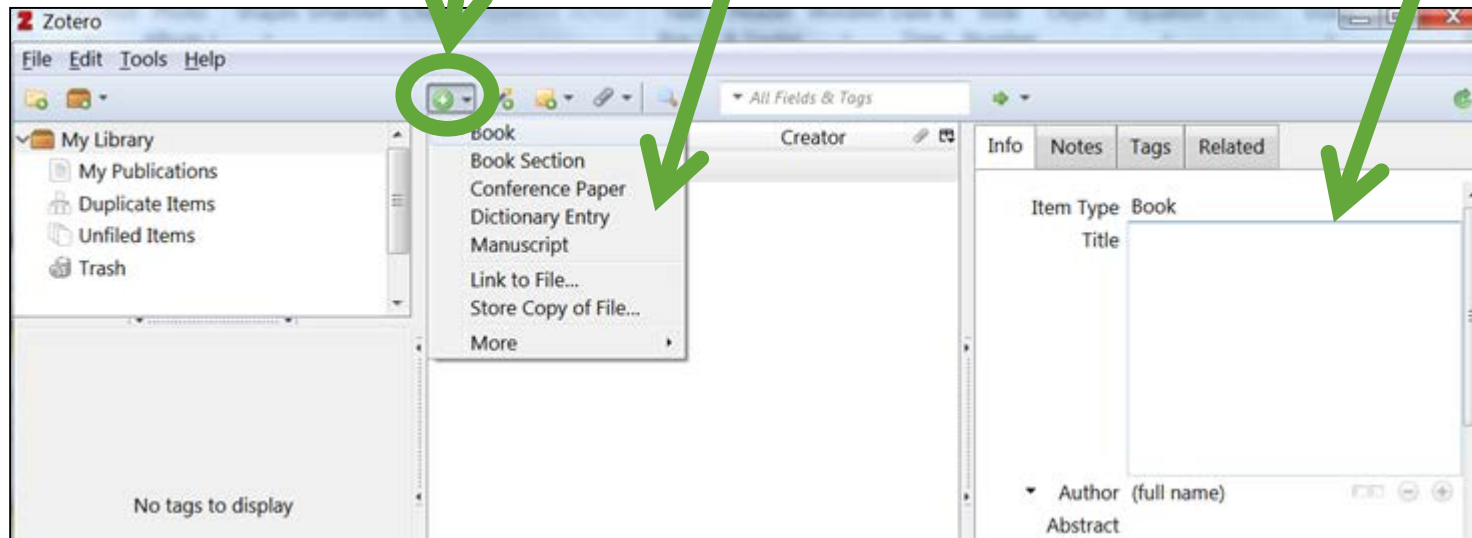


Collect Manual entry

1. Manual add.

2. What type of item is it?







3. Input data into the fields.





Collect

Example Web Translators & Item Types

- Book 
- Book section (chapter) 
- Journal article 
- Thesis 
- Collection 
 - Multiple items, you can select which items you want to add.
- Webpage 
 - Use as a last resort. The more specific your item type, the more accurate your citation will be.



Collect Garbage in, garbage out!

All entry titles should be in **Sentence case**: only the first character and proper nouns are capitalized, the way a sentence is written.

Zotero assumes all capitalized words are proper nouns. In cases where the titles in the bibliography need to be in sentence case (APA, Chicago foreign titles), your bibliography will be incorrect if you do not provide sentence case titles.

Right-click on the text in the title field to **Transform text** into sentence case if it isn't already. You need to capitalize the proper nouns yourself.

Different **item types** have different citation rules.

Make sure your item type is correct and input the necessary fields for your style.

Items added by web translators can have incomplete or bad assignment of data.

It may assign a name to author instead of editor or translator. Names can be switched to a single field for classics authors like Socrates or for Dharma names. Initials can be missing a period.

Review the entries you add and edit if needed.

The screenshot shows the Zotero interface with the following details:

- Item Type:** Journal Article
- Title:** Emotional well-being following religious conversion among women in northeast Thailand
- Author:** Charoenwong, Suangsud
- Author:** Manderson, Lenore L
- Abstract:** Religious conversion can have a prebu...
- Publication:** J Relig Health Journal of Religion and Health

Annotations in the image include:

- A red circle around the title field.
- A red arrow pointing from the text box to the 'Transform text' option in the right-click context menu.
- A green circle around the 'Author' field.
- Green arrows pointing from the text box to the author name and the journal title.



Collect

Chicago Style specific issues

Chicago Style also use 'Short Titles,' 3-4 beginning words, for repeated citations. You will need to fill that in yourself in sentence case.

Info	Notes	Tags	Related
Item Type	Book		
Title			
▼ Author	(full name)		
Abstract			
Series			
Series Number			
Volume			
# of Volumes			
Edition			
Place			
Publisher			
Date			
# of Pages			
Language			
ISBN			
Short Title			

Chicago Style says foreign language titles should be cited in Sentence case (English titles in Title Case). So if there's anything other than **'English' 'en' or blank here**, it will assume it is a foreign language book.

If your computer is not in English setup, or the website you are visiting is not in English, when adding an English item, you need to make sure it doesn't put the foreign language of English: 英語, Tiếng Anh, Englisch, inglés, etc.



Collect Click click click, is it working?!

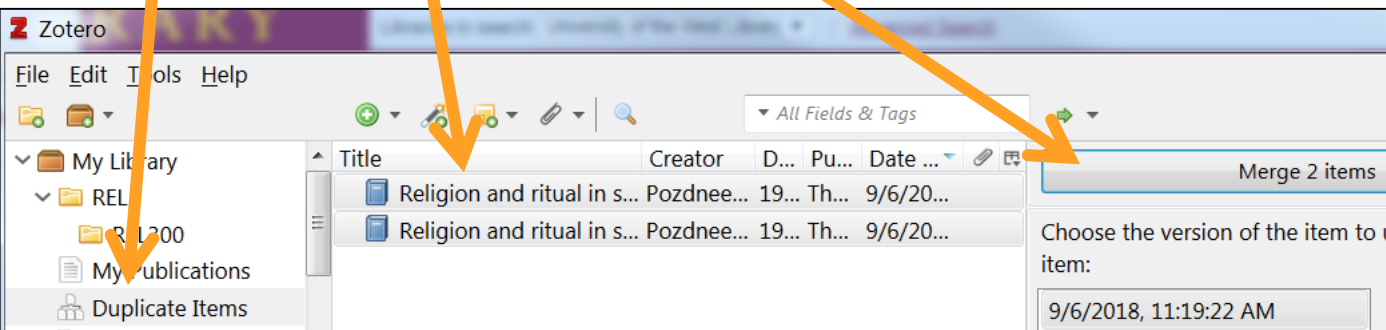
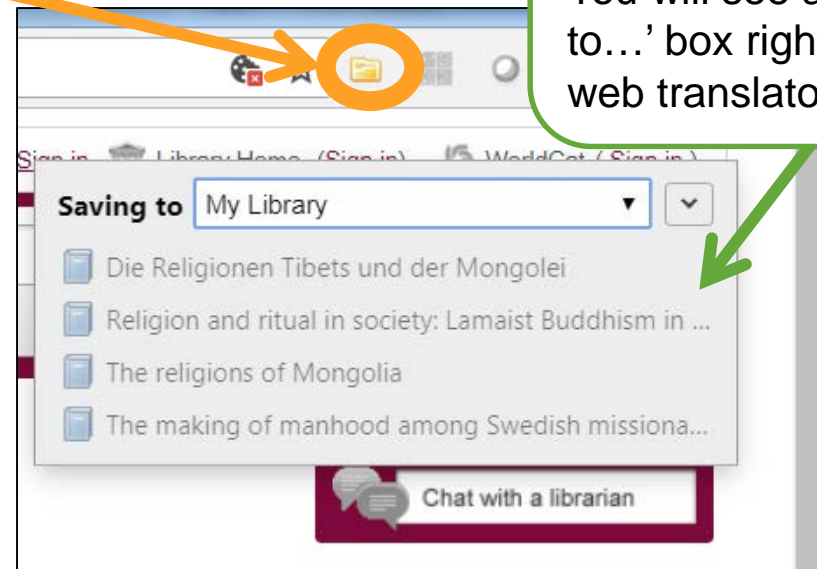
Click only once on the web translator.

If clicked multiple times, you can get duplicate entries in your bibliography.

If you did it by accident, go to 'Duplicate Items' and merge the entries.

How do you know if it is working?

You will see a 'Saving to...' box right under the web translator button





Collect

Not working? No web translator?

- Did you install both (1) Zotero, the program & (2) the browser connector? Are you using the browser with connector?
- Is Zotero, the program, open?
- Is Zotero waiting for your response? Press ESC (upper left) on your keyboard or close Zotero to start over.
- Did the website finish loading? Wait until the website is complete before clicking on the web translator.



Firefox connector

Install



Chrome connector

Install



Safari connector

Install



Edge connector

Install



Collect

Try it out: Exercises

1. Add a book with this ISBN 978-1-4331-2078-7. (Hint: Magic wand)
2. Find a book titled “The Christ and the Bodhisattva” by Donald S. Lopez, Jr. from the library catalog and add its bibliographic info into Zotero. (Hint: Web translator)
3. Manually add this entry (Hint: Item type ‘Book Section’)
Campbell, Helen. “How Religious Communities Negotiate New Media Religiously.” In *Digital Religion, Social Media and Culture: Perspectives, Practices, Futures*, edited by Pauline H. Cheong, 81-96. New York: Peter Lang, 2012.
4. Here is an article: <https://doi.org/10.1007/s10943-014-9988-y>, but there’s no full text access. Regardless, add it into Zotero, maybe you can find it later. (Hint: web translator).
5. Add this DVD as a film: <https://uwest.on.worldcat.org/oclc/770069327>. (Hint: Switch ‘Item Type’)



Organize (Sub)Collections

Click on the Collections icon (folder) to organize your items. It will ask for a name. This can be anything you like.

Right-click on a (sub)collection to create a subcollection under it.

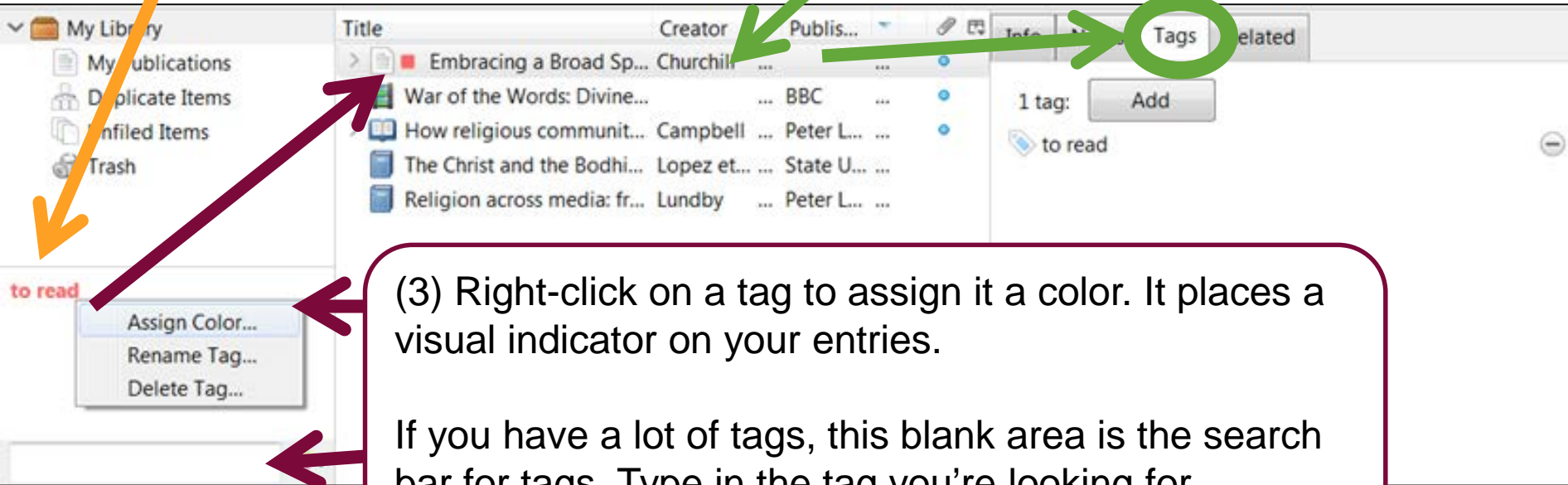


Organize Tags

(2) Once a tag has been created, it will show in the tag section. You can drag and drop other entries on to any tag—that's the same as adding through the 'Tags' tab.

When you click on a tag, only the entries with that tag will display.

(1) Another way to organize entries is by tags. To assign a tag, click on an entry and go to the 'Tags' tab and select 'Add.' An item can have as many tags as you want.



(3) Right-click on a tag to assign it a color. It places a visual indicator on your entries.

If you have a lot of tags, this blank area is the search bar for tags. Type in the tag you're looking for.



Organize Sort & Display

Columns can be sorted by clicking on the header. They can also be hidden away, or put back on sortable display.

The screenshot shows the Zotero application interface. On the left, a list of items is displayed with columns for Title, Creator, Pub..., Info, Notes, Tags, and Related. A green arrow points to the 'Pub...' column header. In the center, a 'Zotero Timeline' window is open, showing a horizontal timeline from 1800 to 2040. A red arrow points from the 'Tools' menu to the 'Create Timeline' option. At the bottom, the 'Highlight' section shows three colored bars: yellow for 'Embracing', orange for 'media', and red for 'women'. Below this, the 'Jump to Year' section has dropdown menus for 'First Band' (Year), 'Second Band' (Decade), and 'Third Band' (Century). The 'Date Type' dropdown is set to 'Date Published'.

You can do a quick visual display of the dates of your entries with a timeline.

Highlight the relevant entries (hold the SHIFT key to select multiple items) and go to Tools > Create Timeline.

Use Highlight to visually assess where certain titles are.



Organize Notes & Files

Attach notes to remind yourself why you added item, thoughts, etc. Note types:

Standalone—not associated with any entry.

Child—associated with the entry you have currently selected.

Attach PDFs, pictures, Word documents, URLs, any other files under each item. You can also drag and drop the files to a Zotero entry.

This helps to identify the source of the file so you can keep files organized and cite as appropriate.

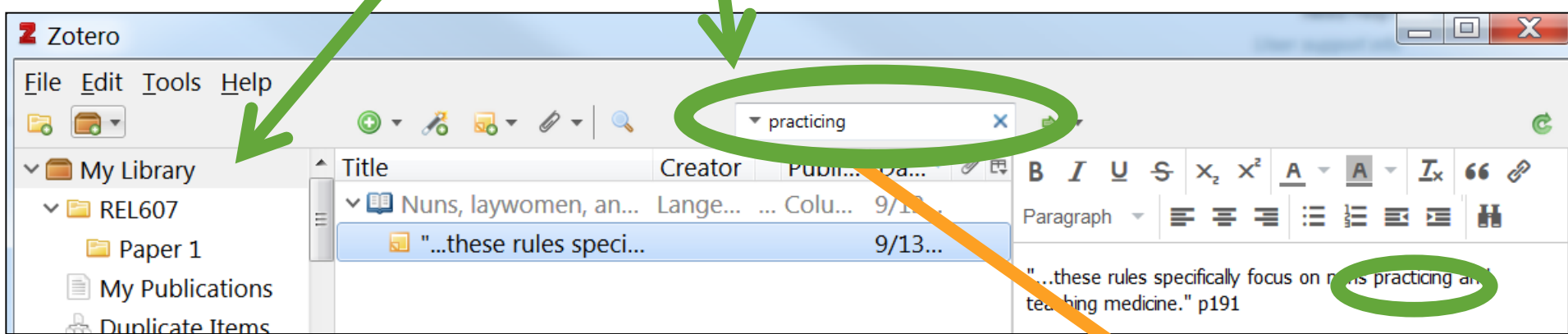
An entry with attachments will be indicated with a caret > symbol.

The screenshot shows the Zotero application window. The left sidebar displays a library structure with 'My Library' expanded to show 'REL607' and 'Paper 1'. The main pane shows a list of items. The selected item is 'Nuns, laywomen, an...' with a green circle around its attachment icon. The right pane shows the details of this item, including a snippet of text: '...these rules specifically focus on nuns practicing and teaching medicine.' p191. The toolbar at the top contains various icons, with green circles around the attachment icons and orange arrows pointing from the text boxes to these icons.

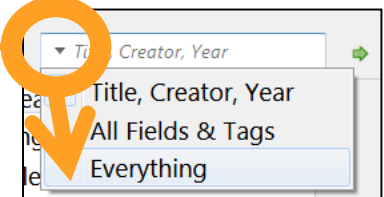


Organize Search

All the Zotero fields (titles, authors, publishers, etc.) and attached notes inside Zotero can be searched with the quick search bar. Make sure you are searching the correct collection. **My Library** always has every item.



To search attached files as well, such as PDFs that have OCR (optical character recognition—if you can highlight the text, it has been OCRed), change to search **Everything**.





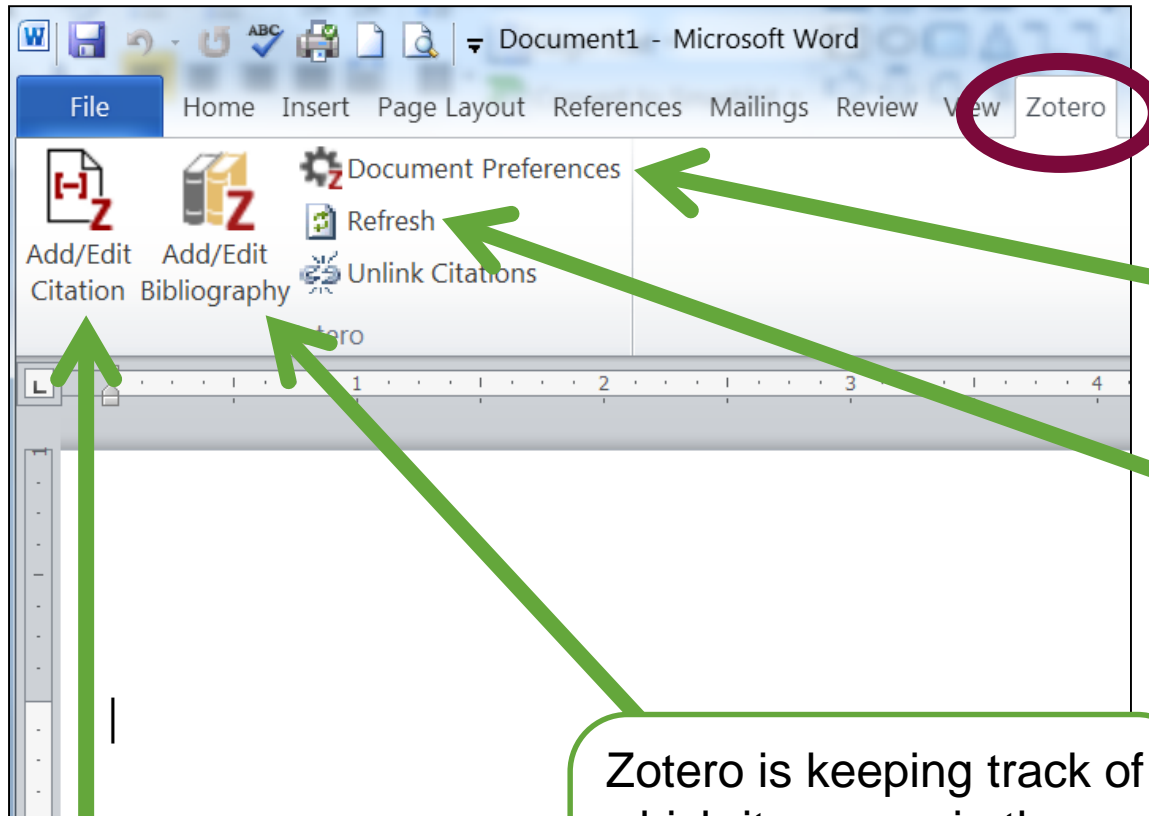
Organize

Try it out: Exercises

1. Add a collection under My Library called “REL607.” Add another subcollection under it called “Paper 1.”
2. While you have ‘My Library’ selected, drag the “Embracing a broad...” article to the “Paper 1” subcollection.
3. See if you can find a full text of the item “Embracing a broad...” Download and save the PDF. Attach the PDF file to the item.
4. Search your Zotero library for the word “caregivers.” Can’t find it? Make sure search **everything**.
5. Copy the sentence in the PDF of the article that includes the word “caregivers” and add it as a child note to the appropriate entry.
6. Add a ‘to read’ tag to “The Christ and...” and make the tag pink. Add “Religion across media...” to the ‘to read’ tag.
7. What happens when you click on the ‘to read’ tag? Click on it again to de-select.



Cite Cite as you write



To change the citation style of this paper.

If there are any errors or typos in the citation, you should correct it in Zotero and come back to the word processor to refresh.

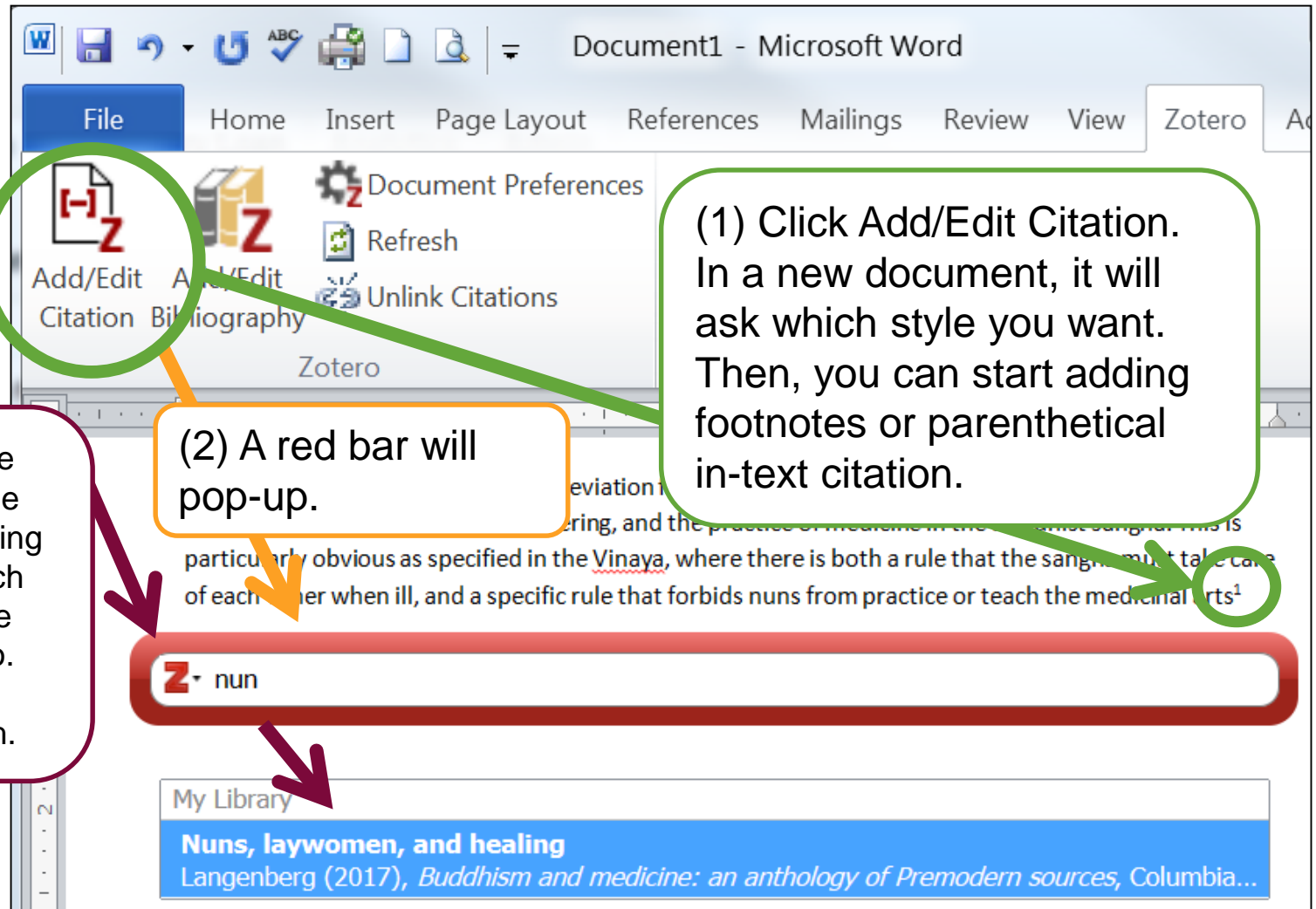
Inserts the footnotes (the number and the citation) in Chicago style (full note). Parenthesis for MLA, APA.

Zotero is keeping track of which items are in the footnotes. So it can generate the bibliography for the paper in one click.



Cite

Add/Edit Citation



(1) Click Add/Edit Citation. In a new document, it will ask which style you want. Then, you can start adding footnotes or parenthetical in-text citation.

(2) A red bar will pop-up.

(3) Start typing the title or author of the source you are trying to cite. It will search the items you have collected in Zotero. Click on the match.



Cite

Add/Edit Citation

To add the page number, click on the citation item (surrounded in blue).

Enter the page number and hit Enter/Return to complete the citation.

You can have more than 1 citation per footnote/in-text citation. Just start typing the title or author after the existing citation to select another item.

When complete, hit Enter/Return one more time. Your in-text citation should display in the paper.

Document1 - Microsoft Word

File Home Insert Page Layout References Mailings Review View Zotero

Add/Edit Citation Add/Edit Bibliography Refresh Unlink Citations Document Preferences Zotero

The central theme of Buddhism is alleviation from suffering. However, there is a tension between the motivation to heal—to remove suffering, and the practice of medicine in the Buddhist sangha, which is particularly obvious as specified in the Vinaya, where there is both a rule that the sangha members should care for each other when ill, and a specific rule that forbids nuns from practicing or teaching the medicine.

Z Langenberg, 2017, p. 191

Nuns, laywomen, and healing
Langenberg (2017), *Buddhism and medicine: an anthology of papers*

Page 191
Prefix:
Suffix:
 Suppress Author

Open in My Library

Page
Page
Book
Chapter
Column
Figure
Folio
Issue
Line
Note
Opus
Paragraph
Part
Section
Sub verbo
Volume
Verse

For styles (APA, MLA) that do parenthetical citation, if the author's is already in the sentence.

For items where page number is not the best identifier.

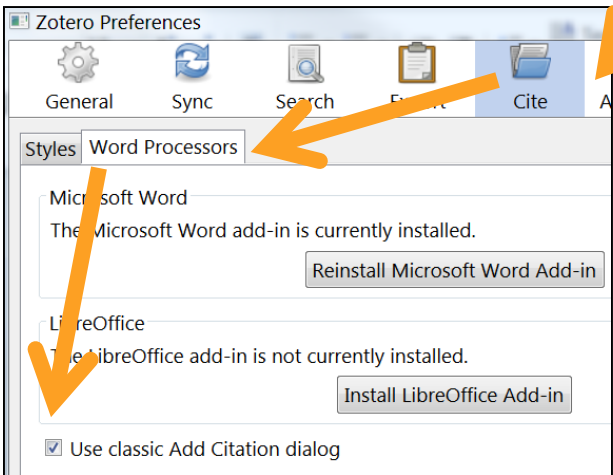
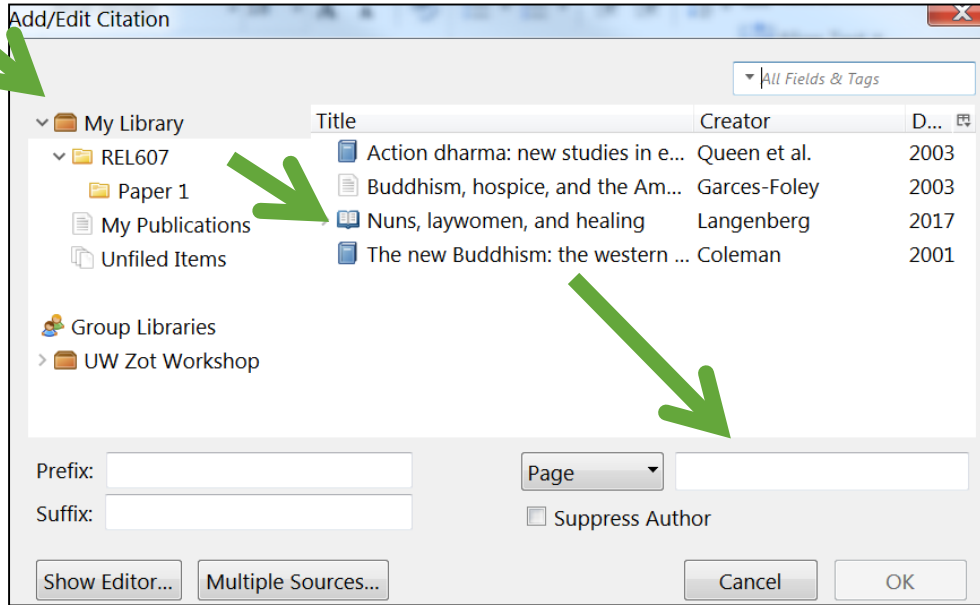
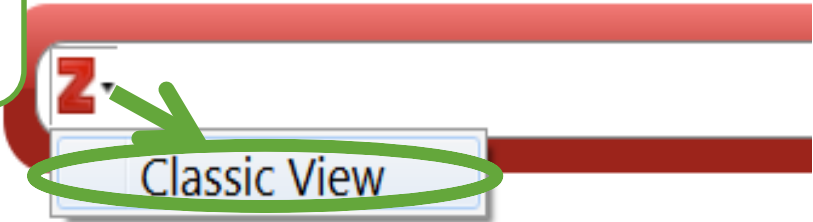


Cite Add/Edit Citation

If you prefer to see all the items you placed in a specific collection when you need to cite, choose 'Classic View'

Pick the item to cite and add the page number.

If you prefer to use the classic view all the time, go to Zotero menu → Edit → Preferences and check 'Use classic Add Citation dialog.'

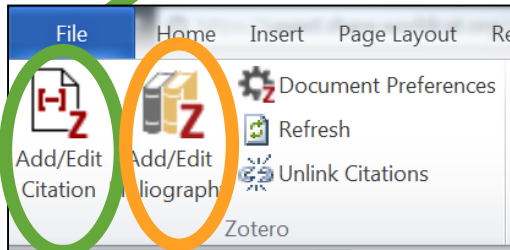




Cite

Add/Edit Bibliography

This is a Chicago style example.



- ¹ Amy P. Langenberg, "Nuns, Laywomen, and Healing," in *Buddhism and Medicine: An Anthology of Premodern Sources*, ed. C. Pierce Salguero (New York: Columbia University Press, 2017), 191.
- ² Christopher S. Queen, Charles S. Prebish, and Damien Keown, eds., *Action Dharma: New Studies in Engaged Buddhism*, RoutledgeCurzon Critical Studies in Buddhism (London: RoutledgeCurzon, 2003), 15.
- ³ Kathleen Garces-Foley, "Buddhism, Hospice, and the American Way of Dying," *Review of Religious Research* 44, no. 4 (2003): 251, <https://doi.org/10.2307/3512214>.
- ⁴ James William Coleman, *The New Buddhism: The Western Transformation of an Ancient Tradition* (New York: Oxford University Press, 2001), 19.

Bibliography

- Coleman, James William. *The New Buddhism: The Western Transformation of an Ancient Tradition*. New York: Oxford University Press, 2001.
- Garces-Foley, Kathleen. "Buddhism, Hospice, and the American Way of Dying." *Review of Religious Research* 44, no. 4 (2003): 341–53. <https://doi.org/10.2307/3512214>.
- Langenberg, Amy P. "Nuns, Laywomen, and Healing." In *Buddhism and Medicine: An Anthology of Premodern Sources*, edited by C. Pierce Salguero, 190–215. New York: Columbia University Press, 2017.
- Queen, Christopher S., Charles S. Prebish, and Damien Keown, eds. *Action Dharma: New Studies in Engaged Buddhism*. RoutledgeCurzon Critical Studies in Buddhism. London: RoutledgeCurzon, 2003.



Cite

Try it out: Exercises

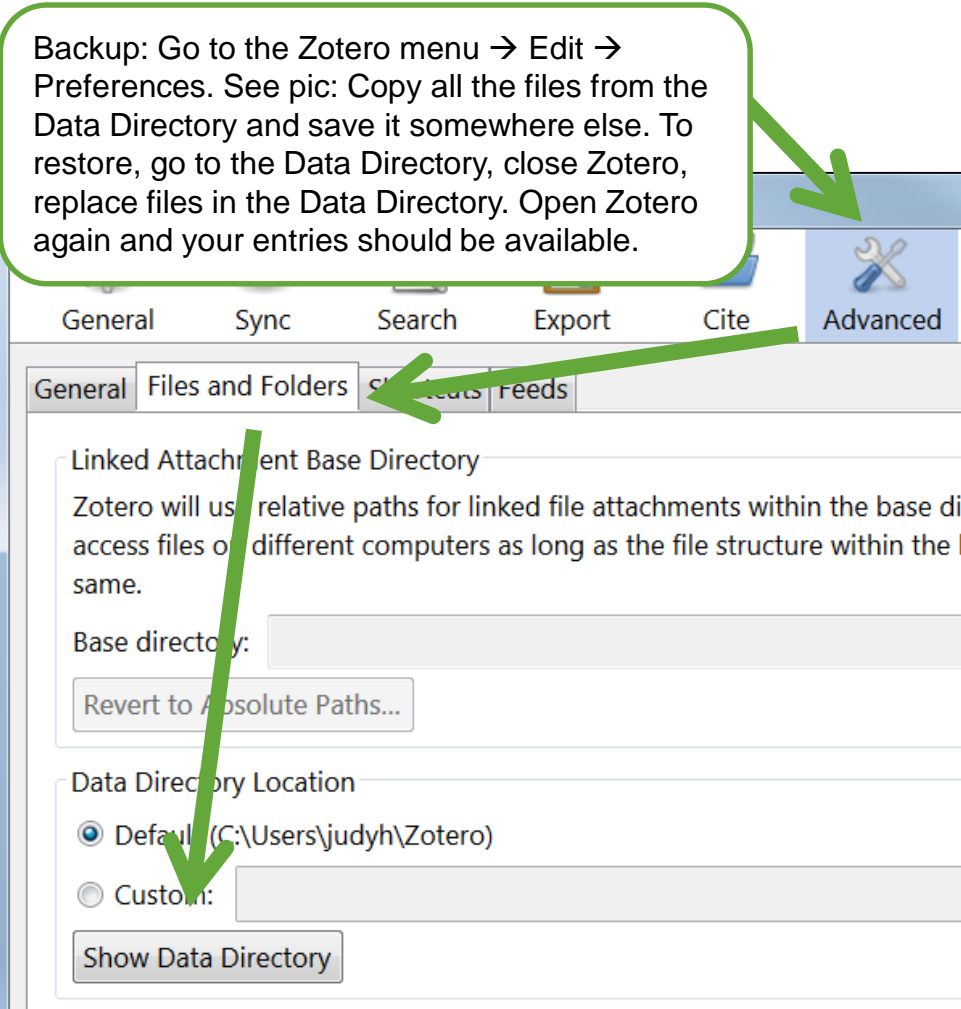
You should have collected 5 items in Zotero.

1. Open a blank document and write a sentence. At the end of the sentence, insert a footnote. Choose the Chicago (Full Note) style. Cite the book written by Lopez, page 12.
2. Write another sentence and insert another footnote. Cite the book chapter titled “How religious communities...” on page 95 **and** the journal article from the *Journal of Religion and Health*, page 760. This second footnote should have two citations.
3. Insert a page break. (Word menu → Insert → (Page) Break). Generate a bibliography. Your bibliography should have the 3 items you cited in this paper.
4. The author of the “How religious communities...” book chapter has a mistake in her name. Her first name is **Heidi**, not **Helen**. Correct it in Zotero and come back to the document to refresh.

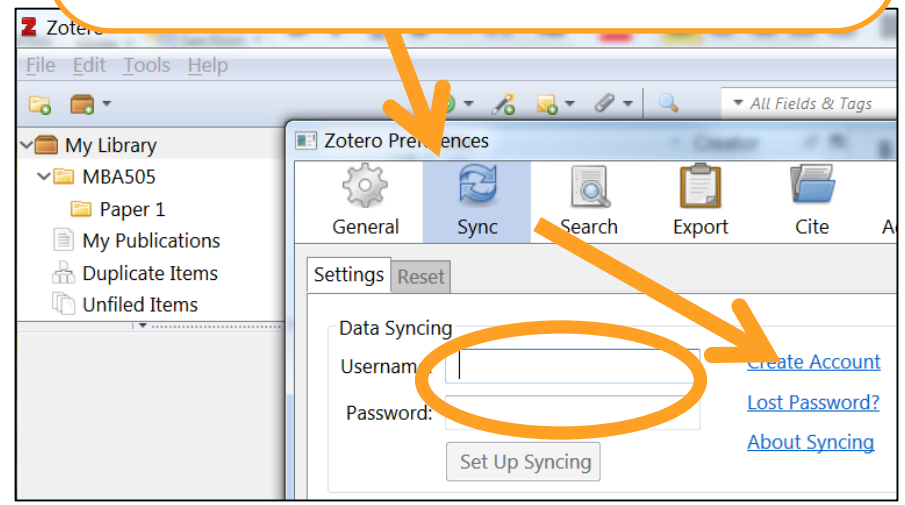


Wrap Up Backup & Sync

Backup: Go to the Zotero menu → Edit → Preferences. See pic: Copy all the files from the Data Directory and save it somewhere else. To restore, go to the Data Directory, close Zotero, replace files in the Data Directory. Open Zotero again and your entries should be available.



Sync (to multiple device & on Zotero.org): Go to the Zotero menu → Edit → Preferences. See pic: Create your own personal account at Zotero.org. Enter your Zotero username and password under Data Syncing. Use the same username/password to pull the same data into multiple devices installed with Zotero.



Syncing Zotero entries are free. The syncing of the first 300 MB of attachment files are free on Zotero.org. If you need more, you can purchase at Zotero.org or look at its documentation for alternatives.



Wrap Up

Zotero Odds and Ends

1. Follow the Zotero Twitter (<https://twitter.com/zotero>) or blog (<https://www.zotero.org/blog/>) and get notice of new features such as:
 - Quick citation w/o opening Zotero by the people who made Zotero: <https://zbib.org>
 - Switch between Google Docs, MS Word, and LibreOffice.
 - Get notifications when an article is retracted.
2. Get pre-Zotero bibliographies into Zotero: https://www.zotero.org/support/kb/importing_formatted_bibliographies
3. Ask Zotero questions in their forums, your account is the account you created for syncing: <https://forums.zotero.org/>



Wrap Up

Questions?

Presenter: Judy Hsu, Librarian.

Contact info:

- Email: library@uwest.edu
- Telephone: (626) 677-3319
- txt: (626) 782-5591 (M-F 9-6)
- Website: Lower right

Questions? [Chat now](#)

 <http://lib.uwest.edu>

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