

How to use Zotero with Articles

Reference Management Software



Ollscoil
Teicneolaíochta
an Atlantaigh

Atlantic
Technological
University

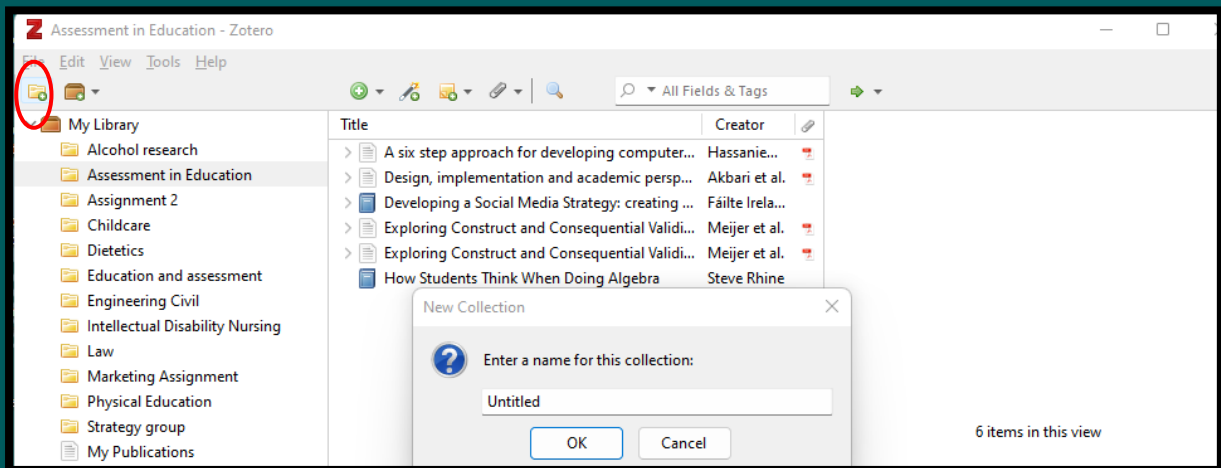
 **Library**

ATU Library How To: Use Zotero for Articles

Have Zotero open when carrying out your research, whether using a database, website, catalogue etc.

Before starting your research, it is very helpful to create a folder on Zotero to save your research into.

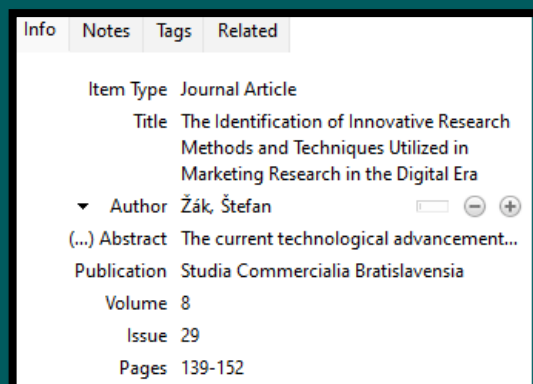
To set up a new folder simply click on the folder with a green + and it will ask you to name the folder.



Metadata

Metadata includes titles, creators, publishers, dates, page numbers, and any other data needed to cite the item.

Every item contains different metadata, depending on what type of item it is. Items can be everything from books, articles, and reports to web pages, artwork, films, eBooks, letters, manuscripts, sound recordings etc.



Metadata for an article

Saving the Article PDF or from the Article Page?

Every database and resource are different, so when you go to save an item into Zotero, check to see *what it has saved as*, and you will know whether to save the article page itself, or the PDF full text.

PDF

Article page

Detailed Record

HTML Full Text

PDF Full Text

Find Similar Results using SmartText Searching.

Result List Refine Search 32 of 36,169

Occupational Therapy Intervention for Concussion.

Authors: [Li, Kitsum¹](#)

Affiliation: ¹Kitsum Li, OTD, OTR/L, CSRS, is Associate Professor of Occupational Therapy, California State University, San Rafael

Source: [American Journal of Occupational Therapy](#) (AM J OCCUPATIONAL THERAPY)

Publication Type: Article - case study, tables/charts

Language: English

Major Subjects: [Occupational Therapy](#), [Sports](#)

The aim is to save the item type in Zotero as a Journal Article and *not* a Web page.

Item Type Journal Article

Title Earth's persistent thermostat

Author Hilton, Robert G.

Item Type Web Page

Title Earth's persistent thermostat

Author (last), (first)

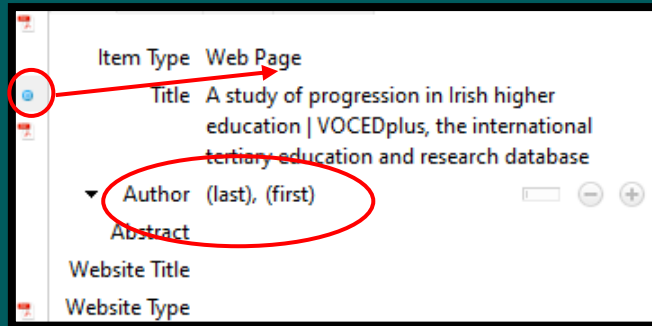
When it saves as a webpage, most of the metadata will be missing to make a reference.

When something is going to save as a webpage Zotero will call it a 'snapshot'

Help Saving to Education and assessment

A study of progression in Irish higher education | V...

Snapshot



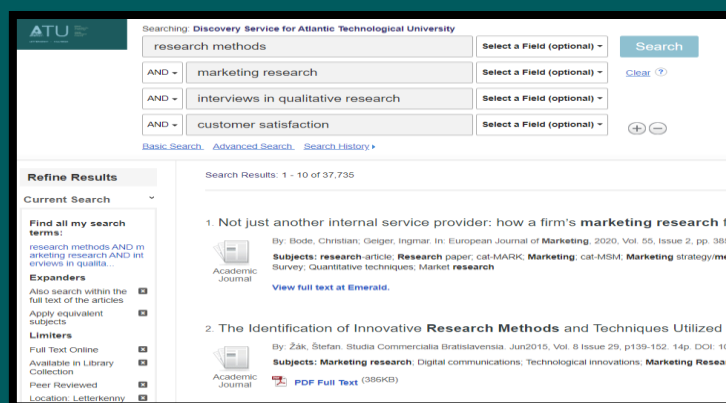
Blue circle indicates it saved as a webpage instead of a pdf; you can see it didn't record the metadata of the author.

Search & Find: article search

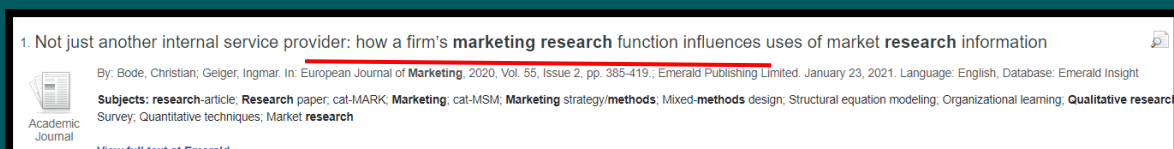
In general, saving the 'PDF Full Text' will save it as a Journal Article (Item Type) in Zotero. However, since databases and resources are designed differently, below are some examples of saving, in order to get the most complete metadata for Zotero.



Using the **Search & Find** tool on the Library website, we have a number of peer reviewed articles on a particular topic.



Click into the title of the article.

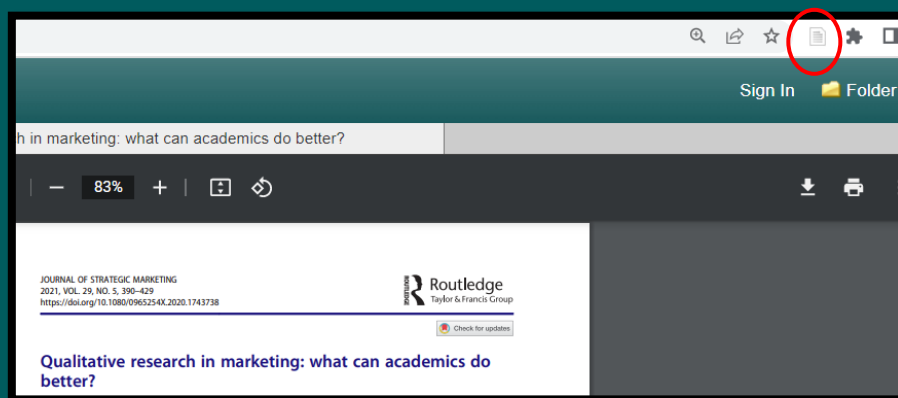


Example 1. PDF Full Text icon

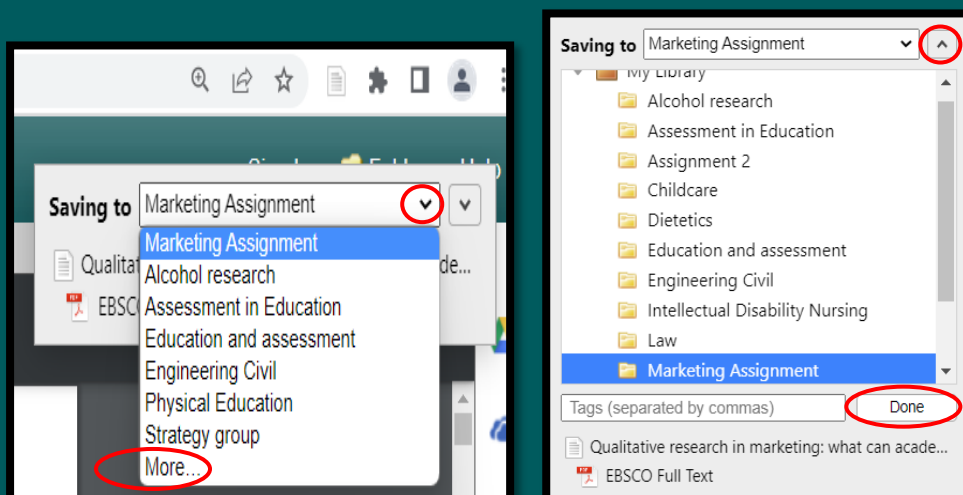
In the example below, the **PDF Full Text icon** is visible once you click into the title of the article. Click into it to get the pdf, as that will give the most complete metadata record for Zotero.



Click on the page icon beside the Zotero icon in the Chrome toolbar. The page icon indicates it is an article. It will ask you what folder in Zotero you would like to save it to.

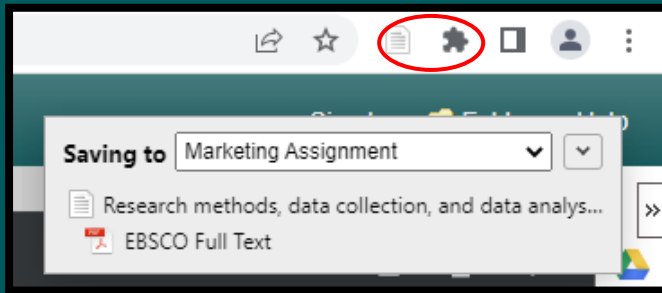


Select the *folder you want to save it to in Zotero*. You can use either of the dropdown arrows to select your folder. It will also automatically save in the main library of Zotero.



Click on 'More' to see all your folders.

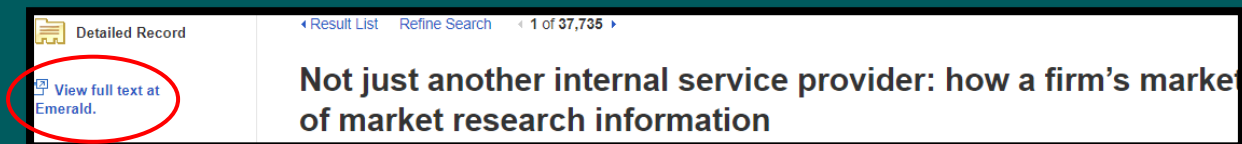
The next article you save, Zotero will remember the last folder you saved in, and it will be the first option the next time.



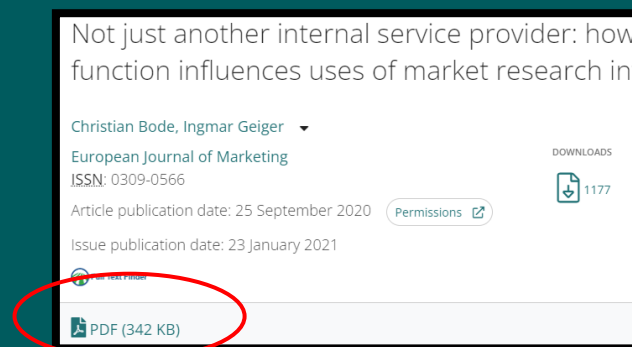
You can continue this process as you read though the articles and judge them to be relevant to your research.

Example 2. Article from the Emerald database

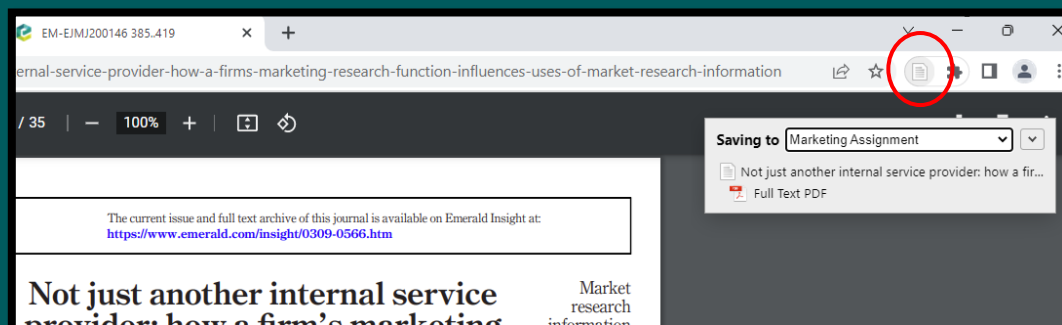
The article below is from the **Emerald database**; access the pdf full text using the 'view full text' option at the left of the page



This brings you into the Emerald database, where you can then access on the pdf.

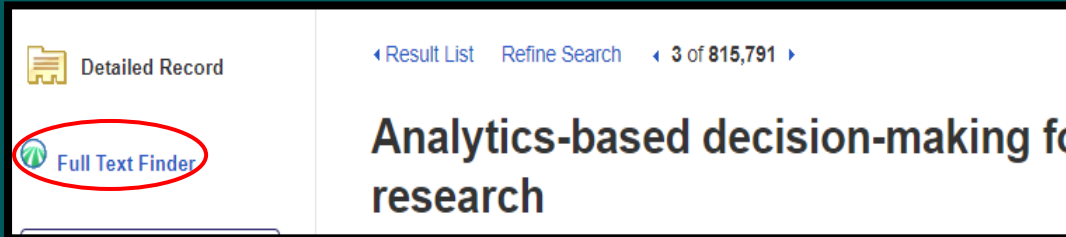


Once you are into the pdf of the article, click on the page icon beside the Zotero icon in the Chrome toolbar. As before, it will ask you what folder in Zotero you would like to save it to.

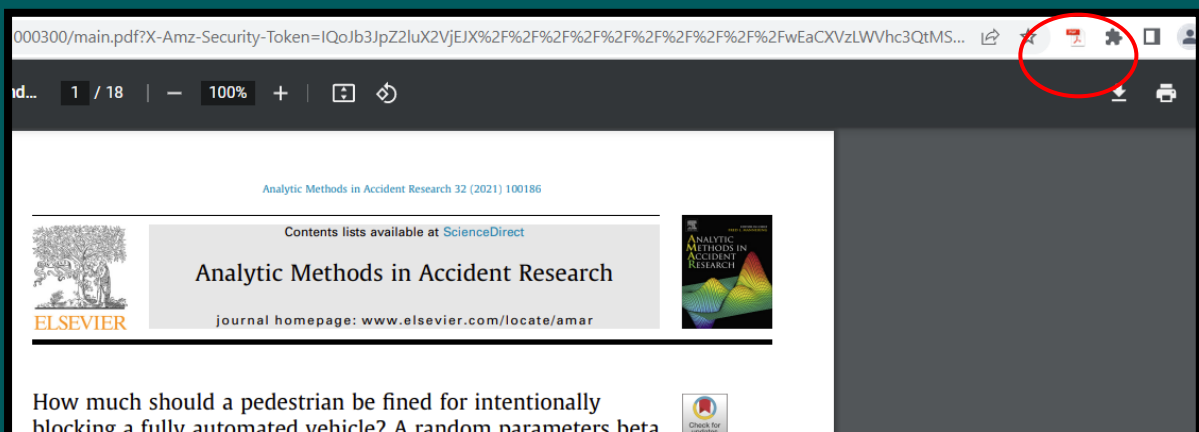


Example 3. Article from the Elsevier database

Article 3 is from the **Elsevier database** – when you click on the ‘Full Text Finder’ from the Search & Find page, it takes you into the article page hosted on Elsevier, with an additional ‘View PDF’ button.



When you click on the ‘View PDF’ it will open up the article, so you can now save in Zotero – notice the Zotero icon has changed to a pdf symbol, rather than the sheet of paper.



Saving articles in Zotero – summary

The process is very straightforward to add articles to your Zotero account:

- Click on the title of the article.
- Depending on the database, go to the pdf of the article, or just to the descriptive article page.
- Click on the Page icon (beside the Zotero icon) in the Chrome browser

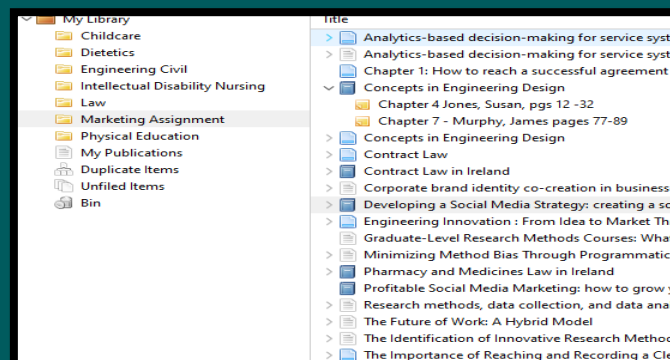


- Select the Zotero folder you want to save the article into

Managing your research information and its sources in Zotero

Zotero is a tool, and it requires some management by the user to ensure the records have all the relevant information.

When you go into your Zotero account, you can see all the resources you have added in My Library, and all your subfolders.

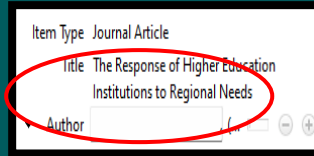
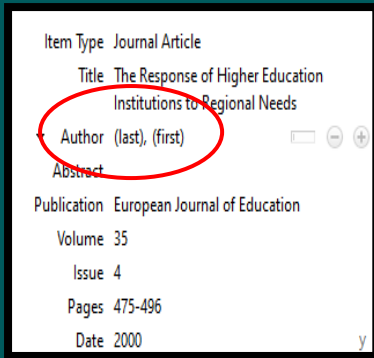


1. Editing the Metadata

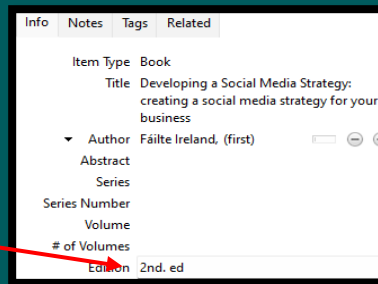
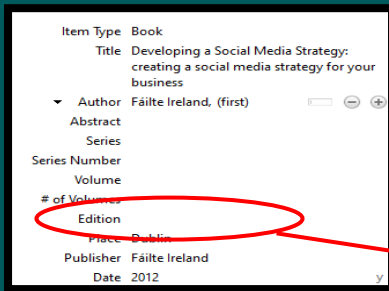
Depending on what reference style you are using, when you click on any item in your Zotero Library, the metadata will appear on the right-hand side of the page.

If there is any metadata missing, that you will need for a citation, you can add it into the fields. It is good practice to fill in the metadata at this stage, rather than when doing the bibliography, as you might be missing important information for a complete reference.

To add in any missing information, just click on the field and type it in

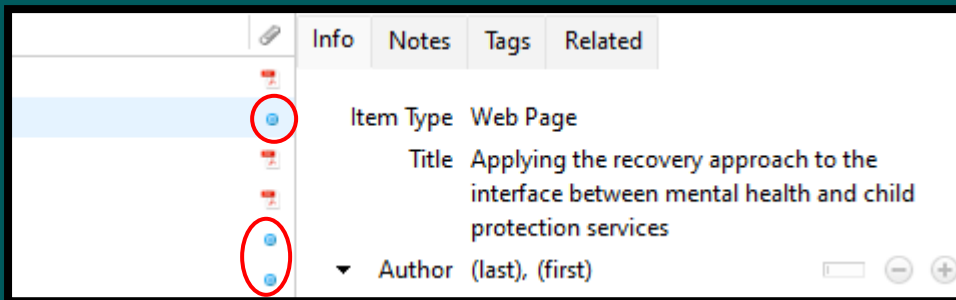


Click into the field and type in the necessary information.



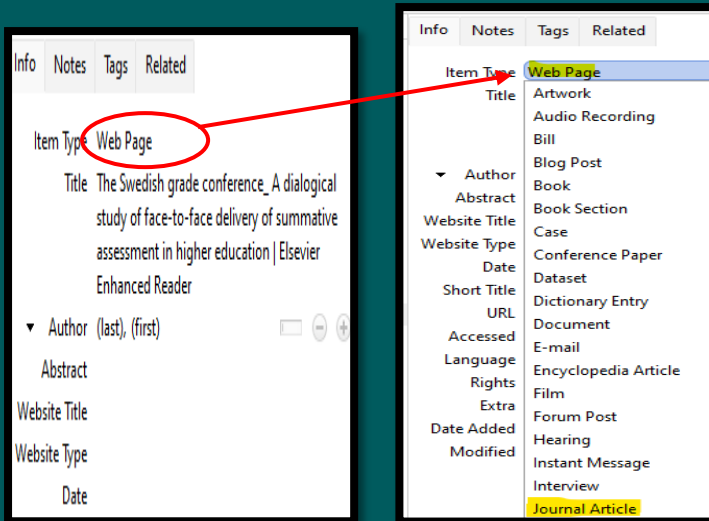
2. Changing the Item Type

If something has saved as a Webpage, and it does not have the necessary fields to fill in for a complete bibliographic reference, you can change the item type from a webpage to an article or book etc.



Blue circles indicate items saved as a webpage instead of a pdf.

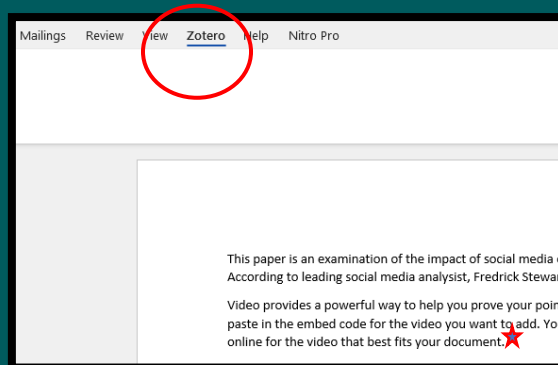
If you click on the words 'web page' beside Item Type – you can select Article (or any item type you are working from), and it will give you all the blank fields you need to fill in to complete the metadata for an article.



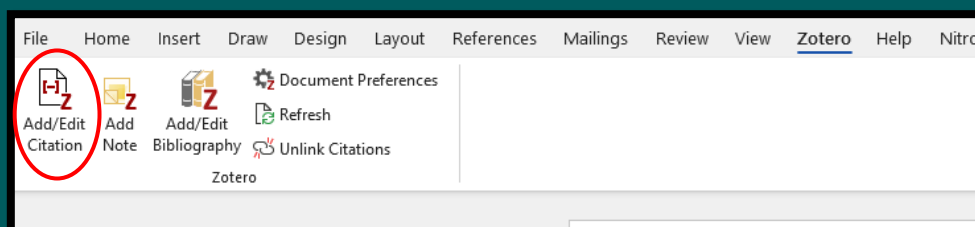
Adding citations to Microsoft Word using Zotero – and creating bibliography

Open up a blank Word document and start typing your assignment.

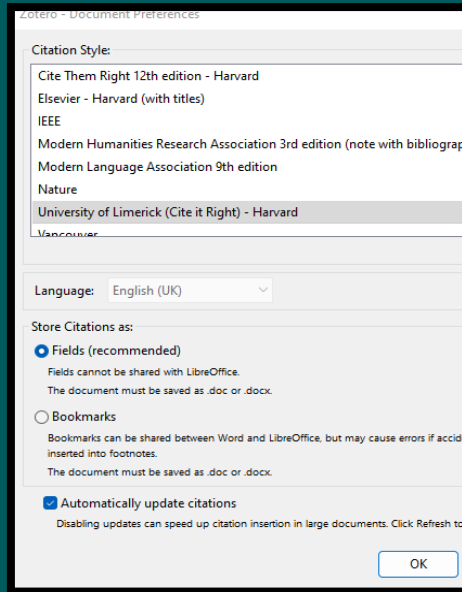
1. Click the cursor wherever in your text you want to include a citation.
2. Then click on 'Zotero' in the toolbar.



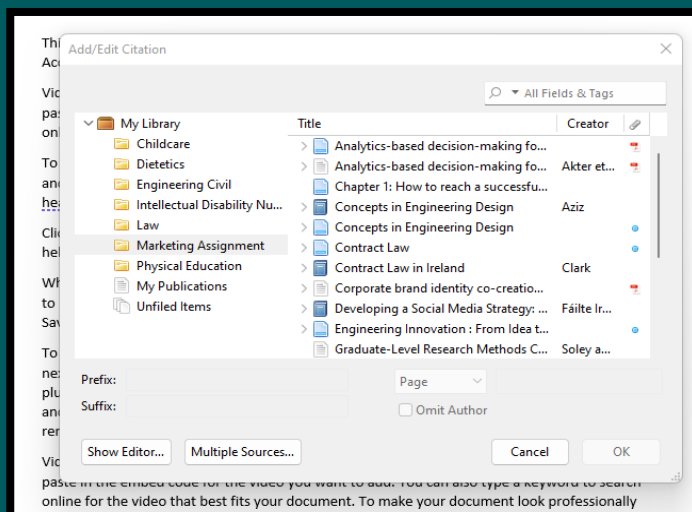
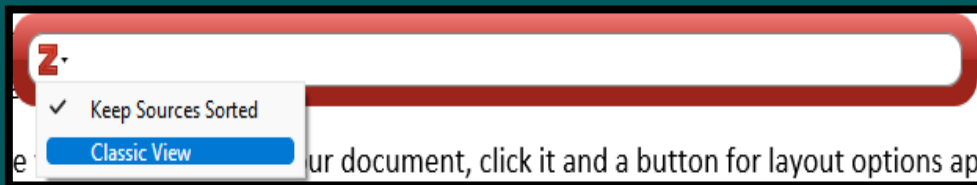
3. Click on 'Add/Edit citation' to pull the citation from Zotero



The first time you do this it will ask you to confirm your reference style. Select OK

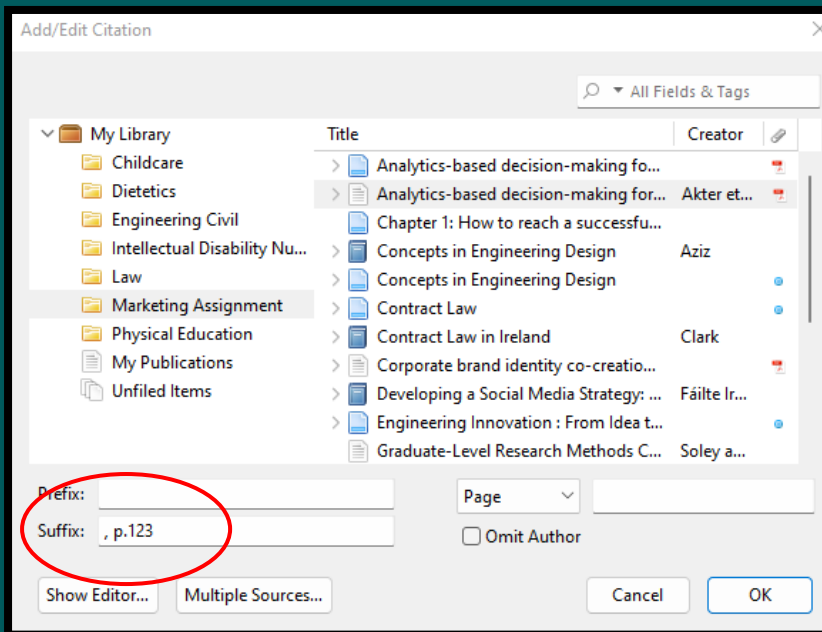


4. Select 'Classic View' from the dropdown, as this opens up your Library and you can select your article.



Classic View

Select the correct article to be referenced. Page numbers need to be added manually, use the Suffix field: **.p123**
Press OK.



This paper is an examination of the impact of social media on marketing trends in the last 20 years. According to leading social media analyst, Fredrick Stewart, the creator of Chatz, the impact has been “beyond the scope of imagining” (Akter et al. 2019, p.123)

Video provides a powerful way to help you prove your point. When you click Online Video, you can paste in the embed code for the video you want to add. You can also type a keyword to search

Repeat this process anywhere you want to add in another citation.

Bibliography

At the very end of your assignment, when all the references are in the Word document, go to Zotero in the tool bar and Add/Edit bibliography. This will add the full bibliography to your assignment.

