Zotero Tip Sheet

User Guide

<u>For Mac Users</u>
- To enable Zotero for Safari it needs to be enabled from the Extensions pane in Safari settings
    1. Open Safari
    2. From Safari click Settings
    3. Select the Extensions tab
    4. Check the box next to Zotero extension to enable it
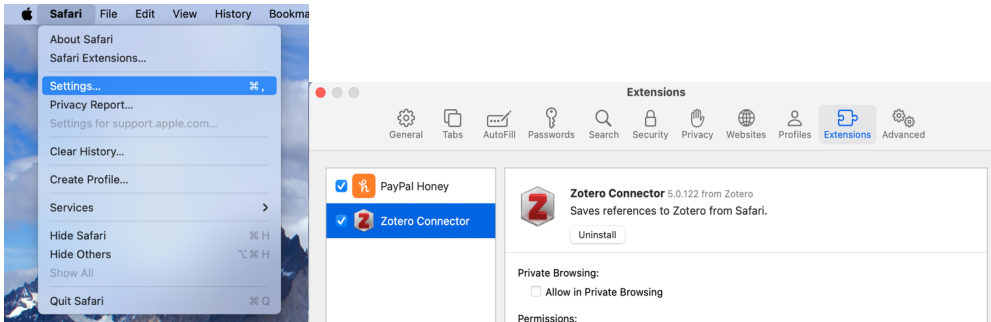
<u>For PC</u>
- Run the setup program you downloaded and follow the instructions

<u>Add Missing Information (Metadata) for PDFs</u>
- To add missing information (metadata) such as author, journal publisher etc.
    1. Right click PDF and click "Retrieve Metadata for PDF"
    2. If Zotero can find a match for the missing information, it will create a full Zotero item with the available data
    3. If that fails, you will have to manually add missing information
    4. To do so right click PDF click "Create Parent Item"
    5. Select "Manual"
    6. Input information on right hand side under "Info" section
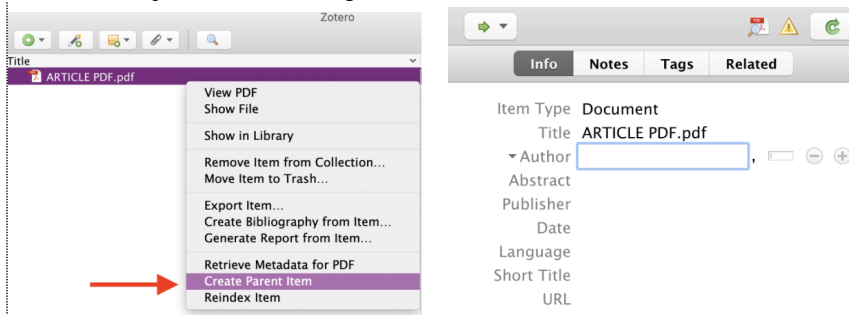
<u>Import from Zotero to Covidence***pdfs must be in Zotero***</u>
- To bulk upload missing full text PDFs from Zotero to Covidence
    1. On Covidence go to "Full Text Review"
    2. Click "Bulk Upload Missing Full Text"
    3. Download studies missing PDFs by clicking "Download Studies"
    4. Find missing pdfs using Zotero (in depth explanation to finding PDFs in Zotero)

5. Drag and drop EndNote XML file
6. Upload PDF file
7. Full text should now be available in "Full Text Review"

Admin Information

Member Settings
- There are three roles for users in groups: **regular members, administrators, and group owners. Administrators** can change a group's public/private status, members' roles, and group library settings. **Group owners** have all the same privileges as administrators, but can also delete the group or transfer ownership to another member.
- If group file storage is enabled, it will count against the owner's storage quota. Other group members' storage quotas will not be affected by the group files.
- If this is a group for a team, lab, or organization, we recommend setting up a separate account for the team to function as the owner of the group, with at least two people knowing the login information. This way, you will not be locked out of the group if the group owner were to leave the team or organization.
- To invite new group members, click the "Send More Invitations" link at the bottom of this page. Pending invitations can also be cancelled from this page.

Storage Subscriptions (click link for pricing plan)

- Zotero groups can also use Zotero Storage at no additional charge. Group file storage always draws from the storage account of the group owner.
- Zotero offers two types of unlimited storage plans for organizations: Zotero Lab and Zotero Institution. These subscriptions provide members of your organization with unlimited personal and group cloud storage. And as is always the case with Zotero, your users can create as many research groups as they like, with as many members as they need.

Extra Information

- All resources will always be in my library even if you create collections
- Collections allow for hierarchical organization of items into groups and subgroups (easier navigation to find specific projects)
- Abstracts must be included prior to uploading full texts into Covidence. To add missing abstract on Zotero input information on the right hand side under "Info"
- Please double check formatting–for example
  1. Brenner, G. A., & Toulouse, J.-M. (1990). BUSINESS CREATION AMONG THE CHINESE IMMIGRANTS IN MONTREAL. *Journal of Small Business & Entrepreneurship*, *7*(4), 38–45. https://doi.org/10.1080/08276331.1990.1060035

- **Transferring Ownership:** If you need to transfer the ownership of the group to a different member, go to the "Group Settings" tab for the group on the Zotero site.There is a transfer tool on the lower right-hand side of the page. This is also where you can delete a group if it is no longer needed.

Commented [1]: this should be in lowercase

Entering Citations

Group Library for PRAN

Group Types
Private Groups
- Private groups provide a means of collaboration among group members without creating any public face for the group online.
- Only group members and users invited to join the group are able to see the group's page.
- Private groups are completely hidden from group searches. They are not shown on members' public profile pages and will not appear in search engine results.
- If administrators enable file sharing, group members can access and share files in addition to references
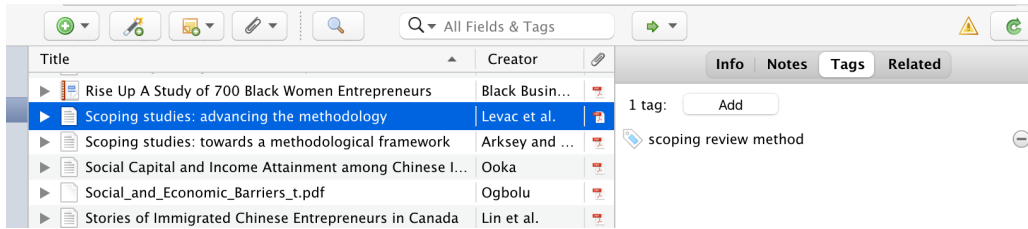
Public, Closed Membership
- Closed-membership groups are useful for creating a controlled group environment with a public presence. This allows a group to publicly present its work and sources, or develop new membership in a controlled fashion.
- Anyone can view the group page, but the only way to join the group is by invitation or by requesting an invitation.
- If the group has a library, administrators can choose to show or hide the library from non-members.
- If administrators enable file sharing, group members can access and share files in addition to references.

Public, Open Membership
- Open public groups are useful for the broadest discussion and collaboration.
- The group page is public, and anyone who wants to can join instantly
- If the group has a library, administrators can choose to show or hide the library from non-members.
- Open public groups do not allow file sharing.
- Allows members to collaboratively manage research sources and materials both online and through Zotero client.
- When creating groups use public membership, closed access so other PRAN Zotero users can access, add and share files in addition to references
- Sync account (between web & app) using green arrow to transfer to from library to specific group
- To access pdfs please use the Zotero app instead of web browser

Adding Tags to Items
- Tags allow you to filter and sort your Zotero library–in this case the *PRAN Library* in almost limitless ways to find specific content, and to see connections between items.
- Please add a tag to the pdf when importing papers. By tagging papers it will help with managing content (searching and organizing) within Zotero.
- For example, if you are working on a project on regarding scoping reviews you would tag those papers as "scoping review method"
- How to add tag:
  - To add a tag to an item, select the item in the center Zotero pane, and then click the Tags tab in the right-hand pane. Click the Add button, type the tag name, and type Enter/Return. You can rename a tag by clicking on it and typing the new name. Once you have added the tag it will also appear in the tag selector in the bottom left.
  - As you type, you will be shown a list of matching existing tags. You can choose a suggested tag using the up and down arrow keys and insert it by pressing Tab or Enter/Return.
  - You can also drag items to a tag in the tag selector in the bottom left to quickly add the tag to all of those items.
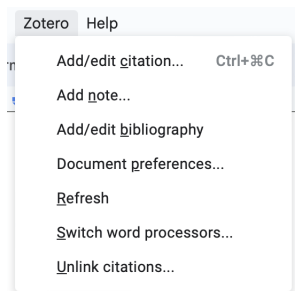
Title	Creator	
▶ Rise Up A Study of 700 Black Women Entrepreneurs	Black Busin...	
▶ Scoping studies: advancing the methodology	Levac et al.	
▶ Scoping studies: towards a methodological framework	Arksey and ...	
▶ Social Capital and Income Attainment among Chinese I...	Ooka	
▶ Social_and_Economic_Barriers_t.pdf	Ogbolu	
▶ Stories of Immigrated Chinese Entrepreneurs in Canada	Lin et al.	

Info | Notes | **Tags** | Related

1 tag: Add

🏷 scoping review method ⊖

Using Zotero with Google Docs & Microsoft Word

- Zotero must be connected to the Zotero desktop application in order to use the web based citing.
- Please ensure file is saved as a google doc and not microsoft word.docx to enable Zotero integration
  - Choose file→ Save as Google Doc to enable this functionality
- The first time you do this you'll need to link your Zotero account with your google drive account
- If using APA citation please make sure it is APA 7th edition for correct formatting not APA6th/7th edition

Google Doc
Citations
- The drop down menu allows you to add citations, bibliography and change the citation format of your document
- To add a citation, place your cursor at the end of the sentence where you want to add a citation. There are 2 ways to insert a citation:
  - Click the Z icon on the toolbar
  - Click on the Zotero menu and click add/edit citation

Zotero   Help

Add/edit citation...   Ctrl+⌘C

Add note...

Add/edit bibliography

Document preferences...

Refresh

Switch word processors...

Unlink citations...

- In the pop-up window that appears, you can choose your preferred citation style, then click ok
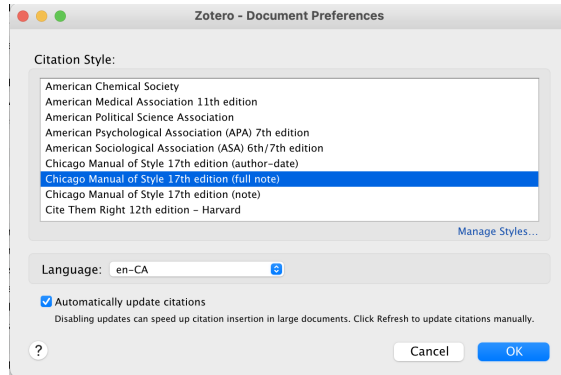
- In the red box that comes up, type in part of the title or an author for the paper you want to cite. Select the correct paper from the dropdown menu.

- The citation is now where your cursor was placed
- To change the citation style, click on the Zotero menu, then document preferences. Click on the new preferred style and press ok.

Bibliography
- To create a bibliography, click on the Zotero menu and then add/edit bibliography. A bibliography, formatted in your chosen citation style will be added to your paper.
- Example: The population of Black Canadians doubled from 573,860 persons in 1996 to 1,198,540 persons in 2016, currently accounting for 3.5% of Canada's total population(Statistics Canada, 2023). This remarkable growth is credited, in part, to significant inflows of immigrants and refugees from Sub-Saharan Africa (Brenner & Toulouse, 1990)

Brenner, G. A., & Toulouse, J.-M. (1990). BUSINESS CREATION AMONG THE CHINESE IMMIGRANTS IN
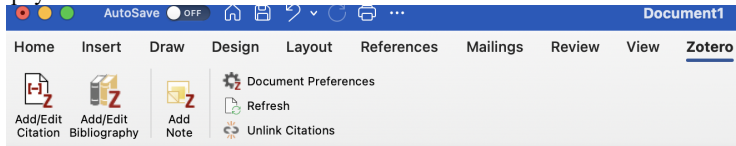
MONTREAL. *Journal of Small Business & Entrepreneurship*, *7*(4), 38–45.

https://doi.org/10.1080/08276331.1990.10600359

Statistics Canada. (2023). *Black Business Owners in Canada*. https://doi.org/10.25318/11F0019M2023001-ENG

For Microsoft Word

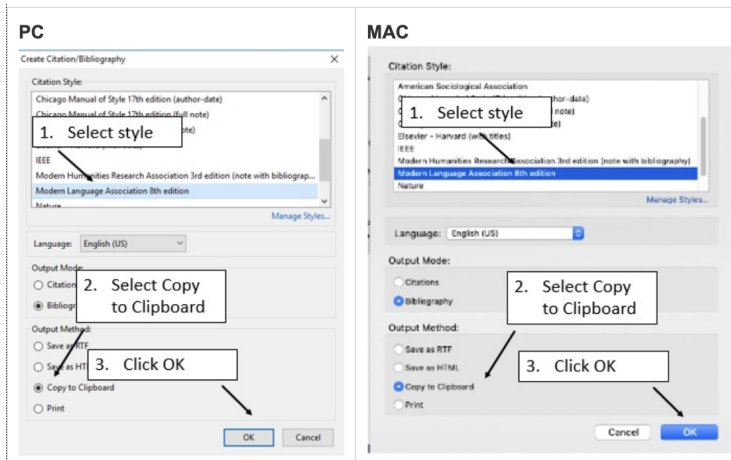● Once installed in Word, Zotero can be found in the toolbar. Click the tab to add/edit citations and bibliography

Stand Alone Bibliography on Mac or PC
● Select some or all of the references in your Zotero library. Right click and select Create Bibliography from Items.
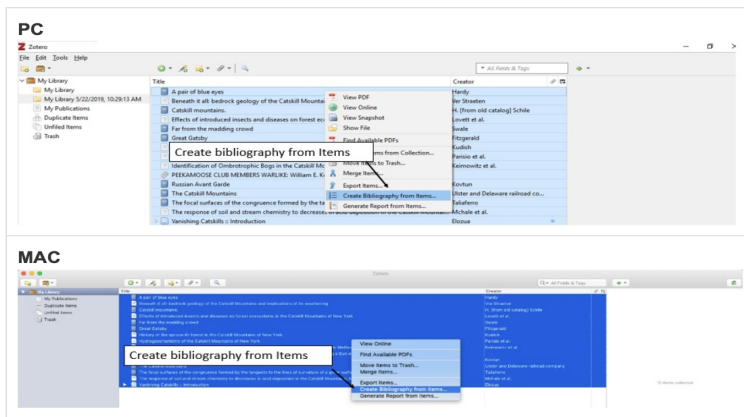
● Choose citation style and copy to clipboard for pasting into document or email

- Paste into the document