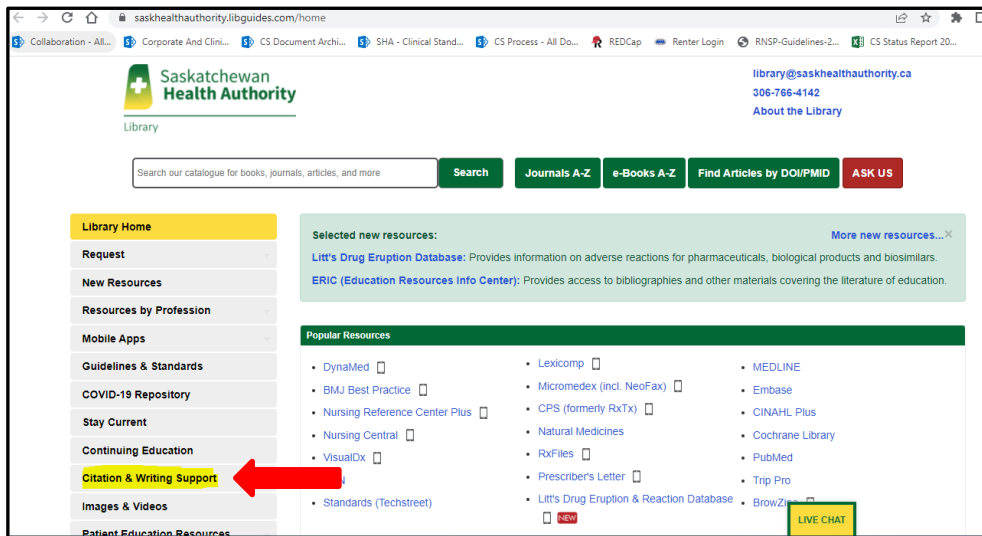|	
![Saskatchewan Health Authority logo] **WORK STANDARD**	**Title: Zotero Citation Manager: Installing Zotero, Creating Citations and a Reference List** **Role performing Activity: Clinical Standards and Professional Practice (CSPP) Directors, CSPP Managers, Clinical Standards Specialist (CSS), Leads/Co-Leads**

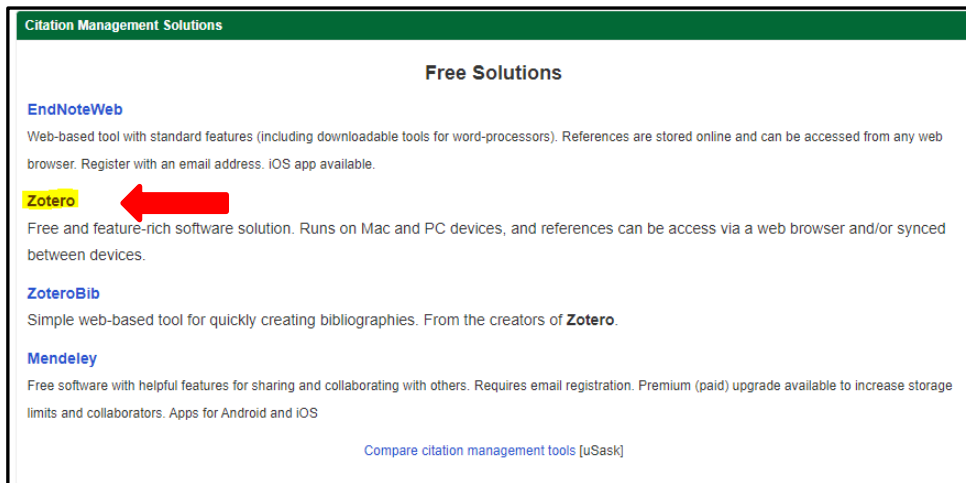| **Location: Saskatchewan Health Authority (SHA)**	**Department/Unit:** SHA-CSPP
Document Owner: CSPP- CSS	**Date Prepared:** April 5, 2022
Last Revision: June 7, 2022 October 21, 2022	**Date Approved:** June 10, 2022
Related Policies/Documentation N/A	

Work Standard Summary: The purpose of this Work Standard is to provide step-by-step instructions on how to install and use Zotero to create citations and a reference list. Refer to the hyperlink included in each section title for helpful You Tube videos for: 1) **Installing**; 2) **Creating Library Collection Subcollection**; 3) **Creating Library (Independent Search): Collecting References**; 4) **Creating Library and Collecting References (RIS): SHA Library Lit Search**; 5) **Manual Entry of References- Using Identifier or Metadata**; 6) **Citing** and **Referencing in a Word Document.**

Essential Tasks:
INSTALLING ZOTERO: ZOTERO TUTORIAL GETTING STARTED

1.	Log on to computer and open up the **Saskatchewan Health Authority intranet** site using **Google Chrome.**
2.	Select **Departments, Programs & Resources**, then click on **SHA Library** which is found **under Academic Health Sciences.**

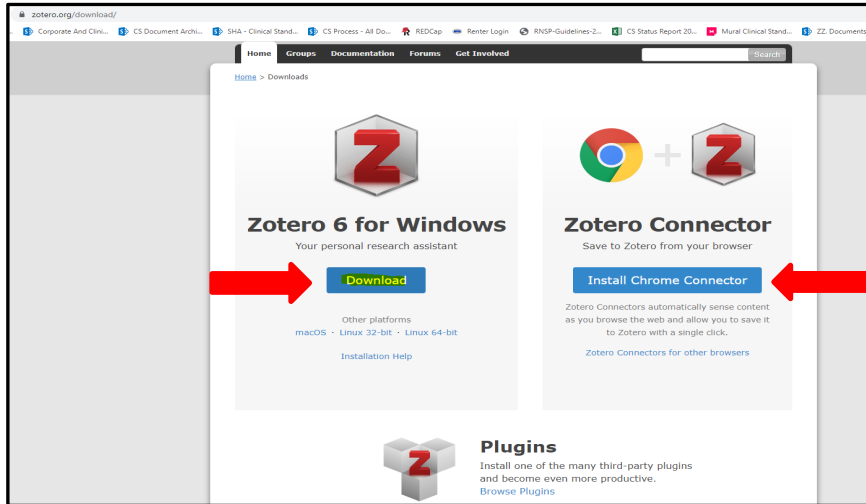| 3.	Under the *Library Home* section found on the left-hand side, click on ***Citation & Writing Support***.
4.	In the *Citation Management Manager- Free Solutions* section, and click on **Zotero** to open.
5.	Click on the [Download] button.
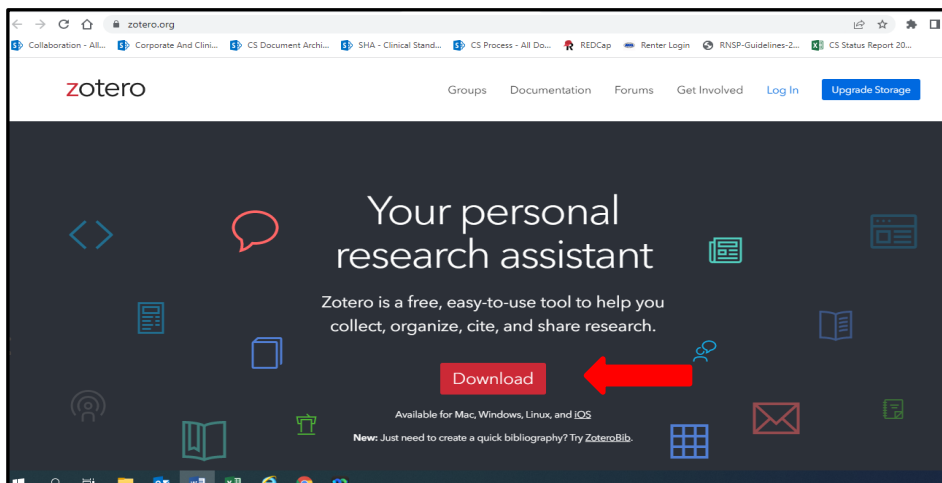
| 6. | a) Download **Zotero 6 for Windows** (This is the application that is downloaded into your hard drive.) |
	b) Follow installation instructions found **here.**
	c) Download **Zotero Connector** in **Google Chrome.**
	• Save to your browser. (This helps bridge between the research found on the internet and getting the information into the Zotero application on your hard drive).
	d) This [icon] icon will appear on your desktop when **Zotero** has been successfully installed.
7.	Open **Zotero.**

| | **NOTE**: Prior to collecting references from Zotero, you must first navigate to the program's preferences. (See steps below for MAC and PC). |

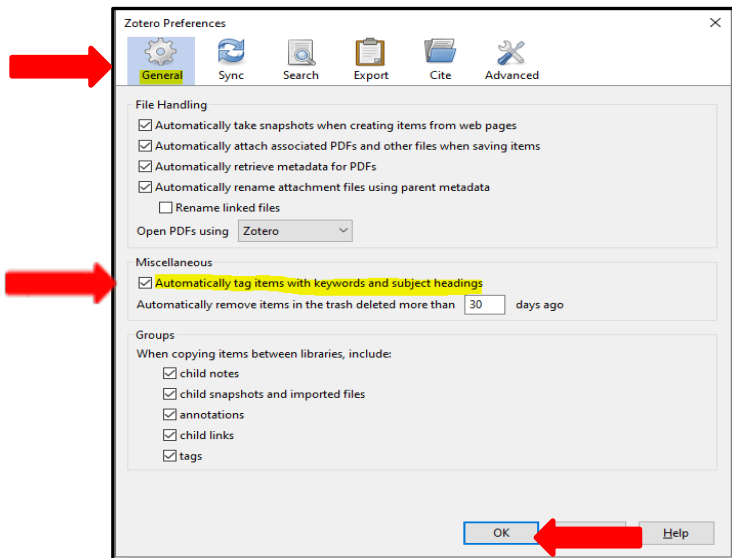| 8. | a) **If using a MAC:** |
	• Click on **Zotero** found at the top left-hand side you your tool bar
	• Choose **Preferences**
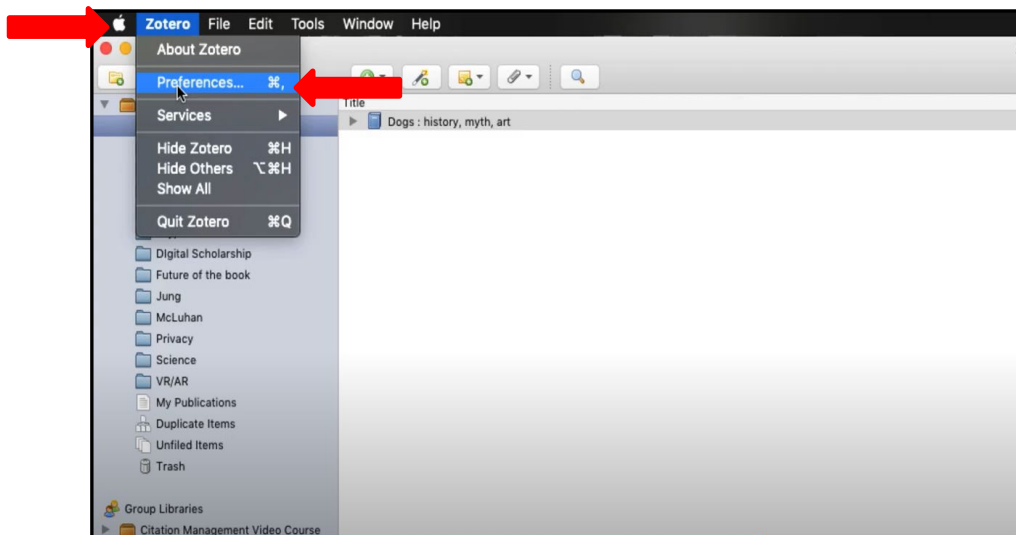
b) **If using a PC:**
- Click on *Edit* button in your tool bar.
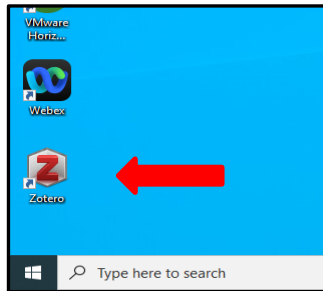- Choose *Preferences*
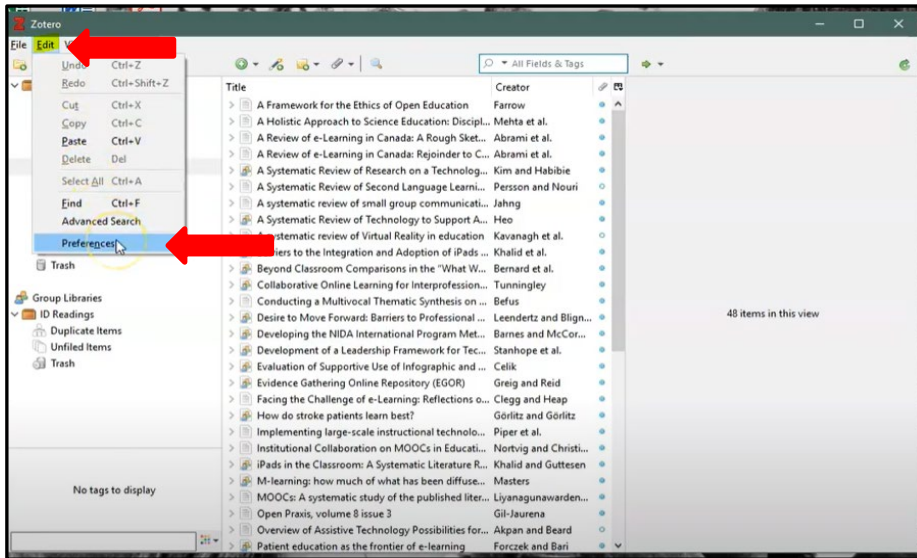
9.	Under *General*, scroll down until you locate *Miscellaneous.*
	- <u>Uncheck the box</u> beside *Automatically tag items with keywords and subject headings*.
	- Then select *OK.*

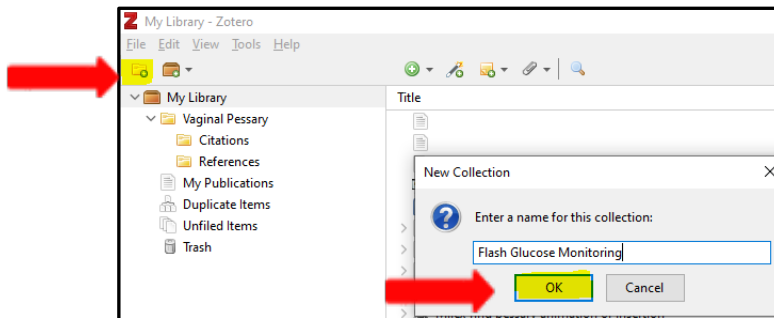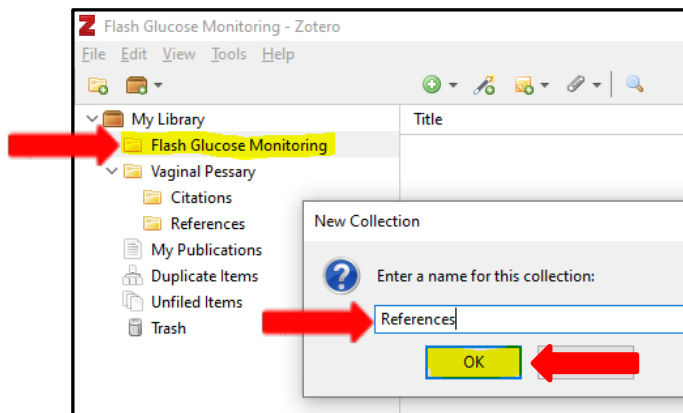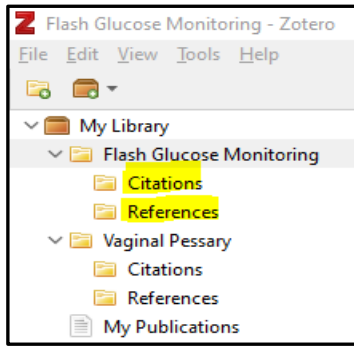| CREATING YOUR LIBRARY COLLECTION AND SUBCOLLECTIONS	
10.	Log into your *Zotero* account and open. **OR**
11.	To create a *new Collection* for your topic, click on the [icon] icon, enter name, then click *OK*.
12.	To create *New Subcollections* to organization references and citations, right-click your mouse on desired *Collection*. Choose *New Subcollection*, name, and click *OK.*

NOTE: Create a subcollection for citations and references **prior to** adding to the desired collection. This will allow you to keep your citations and references organized.

| 13.	Example of Citation and Reference Subcollections.

<table>
<tr><td colspan="2" style="background-color:orange">CREATING YOUR LIBRARY: COLLECTING REFERENCES- ZOTERO TUTORIAL COLLECTING REFERENCES</td></tr>
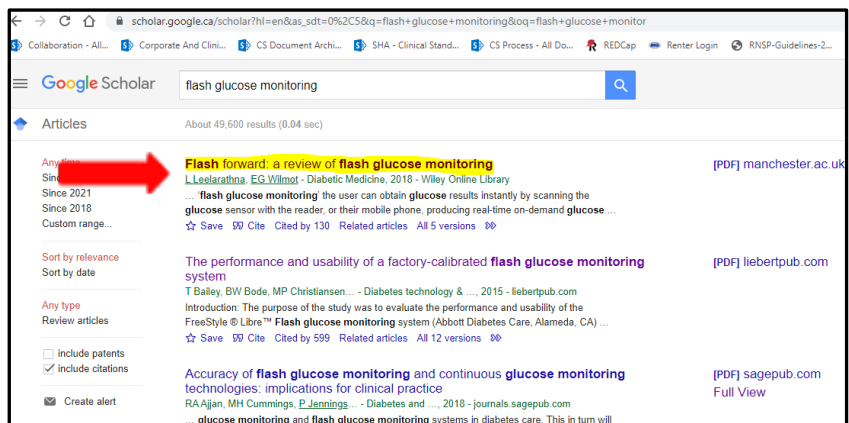</table>

| 14.	Use such resources as **Google Scholar** and the **SHA Library** when performing an independent literature search for reference and citation material.

	A. Google Scholar:
	    i) Enter topic/subject matter into the search bar and click [🔍] icon.
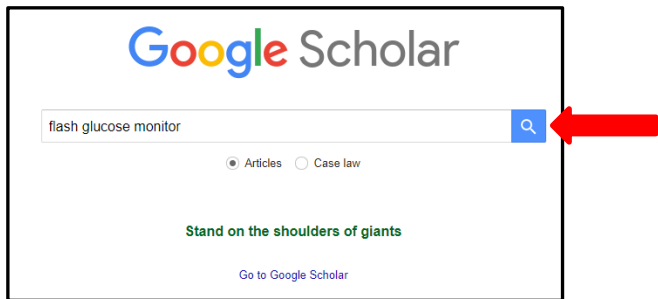	
	    ii) Select article to review and add to your Library Collection.

iii) Open the *Zotero Connector* **extension** by clicking on [icon] the icon found in the tool bar at the top right-hand corner.
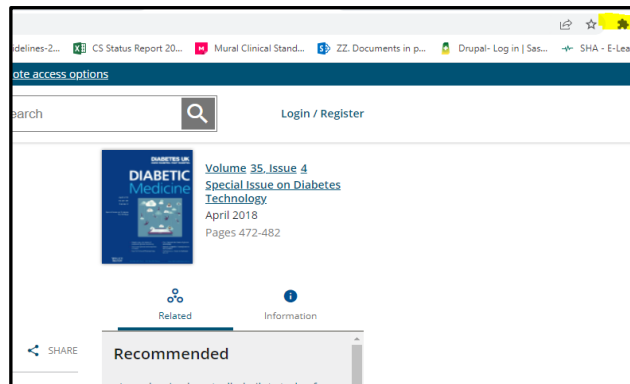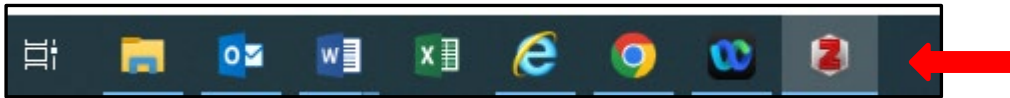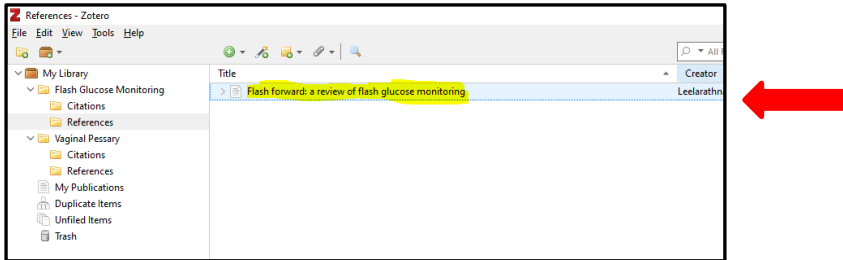

iv) Select *Zotero Connector.*
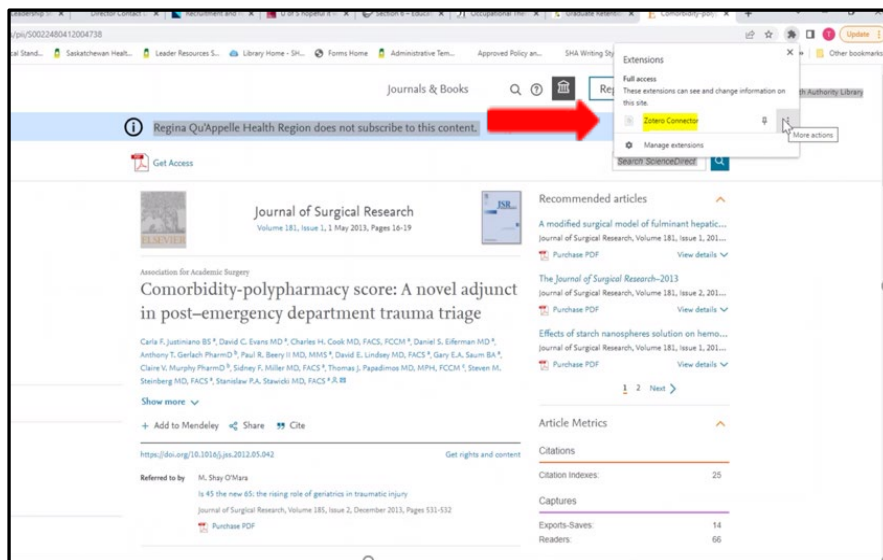
v) Select the library or collection that you want to save it to. Use the drop-down arrow to show additional collections and subcollections
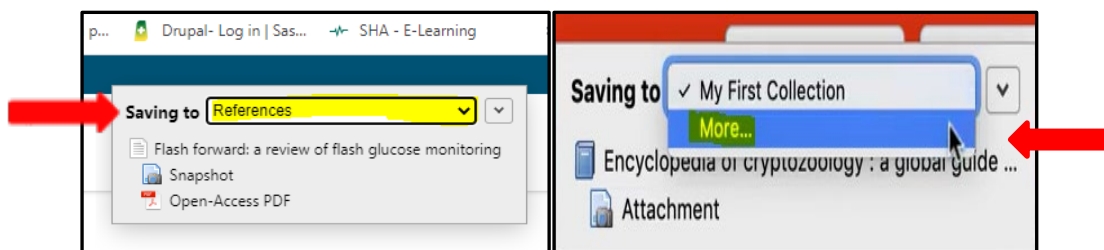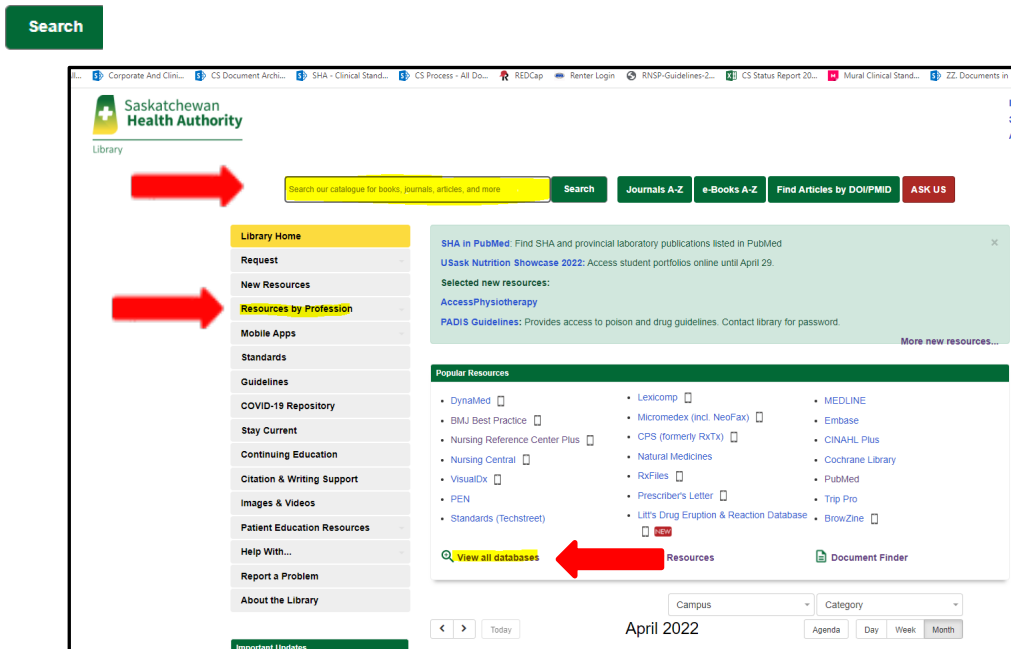
vi) Open *Zotero*.

vii) The selected article will be found in the chosen collection or subcollection.

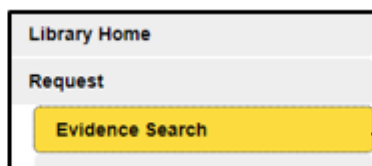**A.** **Independent literature search** using the *SHA Library*: **A-Z Databases** or **Resources by Profession** or

CREATING YOUR LIBRARY- SHA LIBRARY GENERATED LITERATURE SEARCH

15.	Request a literature/evidence search through the **SHA Library** using the **online evidence search request form**

Step 1:
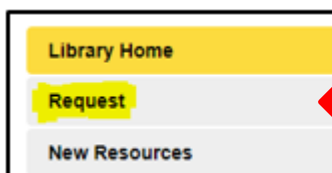
Step 2:

NOTE: When requesting a literature/evidence search through the SHA Library, ask for the results to be sent as *RIS* files (Example: **OT COVID.ris**). This allows upload for all applicable references using Zotero.
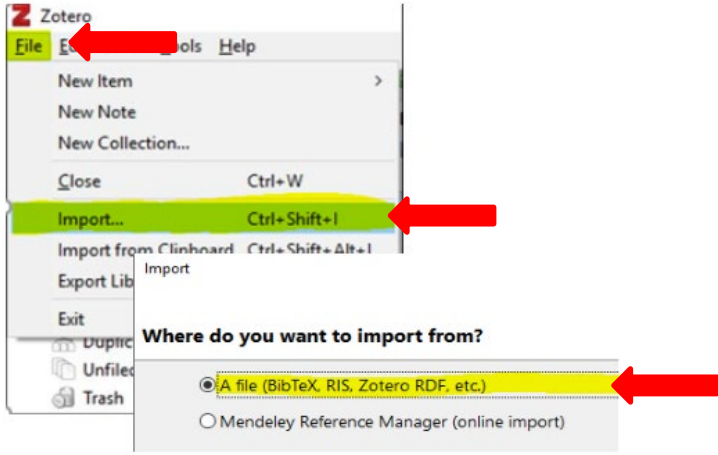
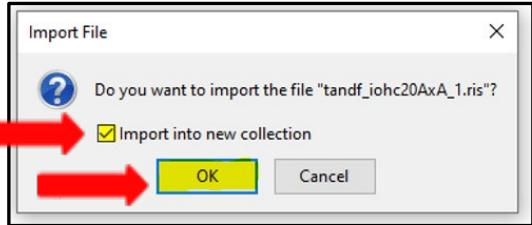|	
16.	When importing the **RIS files** sent by the SHA Library, first open *Zotero.* OR
17.	To import **RIS files**, click on *File* then choose *Import.* Select *A file (BibTeX, RIS, Zotero RDF, etc.)*
18.	Check box *Import into new collection*, then select *OK*. • **Use this RIS File: OT COVID.ris as a practice example**
	ADDING ITEMS/REFERENCES INTO ZOTERO USING IDENTIFIER OR METADATA
19.	A. **By Identifier**
	NOTE: This method requires you to know the reference's **ISBN/DOI/PMID/arXiv IDs**.

i.   Locate your reference's **ISBN/DOI/PMID/arXiv ID**.

Peripheral IVs

**Factors Affecting Complications and Patency—A Randomized Controlled Trial**

Tripathi, Sandeep MD; Kaushik, Vidhu MD; Singh, Varinder MD

Author Information⊙

Journal of Infusion Nursing: May 2008 - Volume 31 - Issue 3 - p 182-188
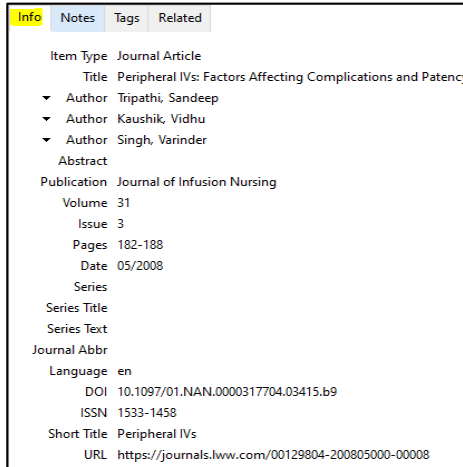doi: 10.1097/01.NAN.0000317704.03415.b9

ii.   Click on the *magic wand* icon
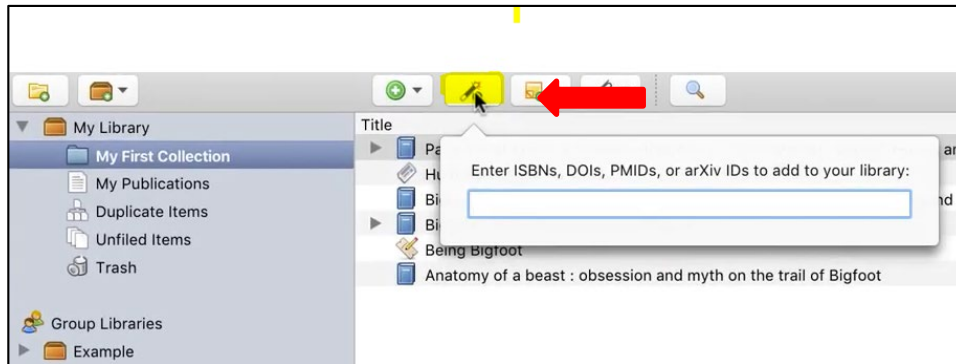
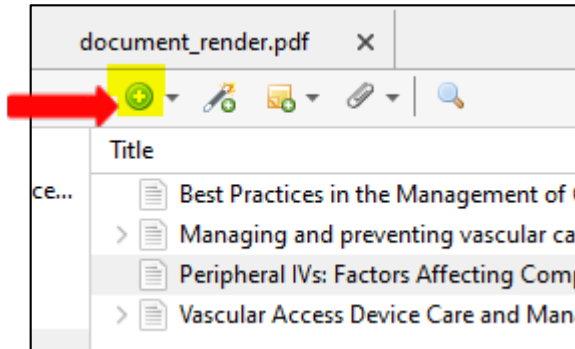iii. Enter the **ISBN, DOI, PMID, or arXiv IDs** to add the reference to your library and click *ENTER*.
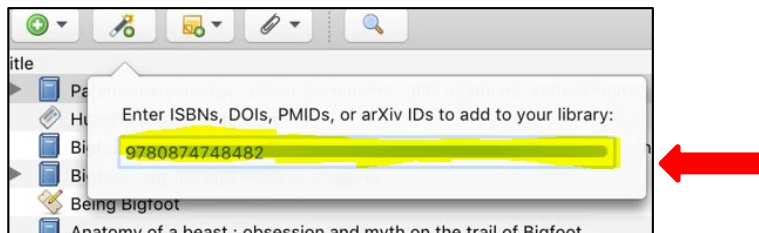
iv. The metadata will automatically generate in the column found on the far right-hand side, and the reference will be entered into the library collection or subcollection. (See example below)
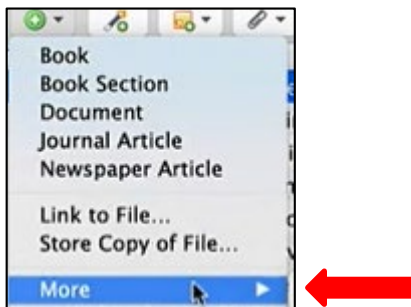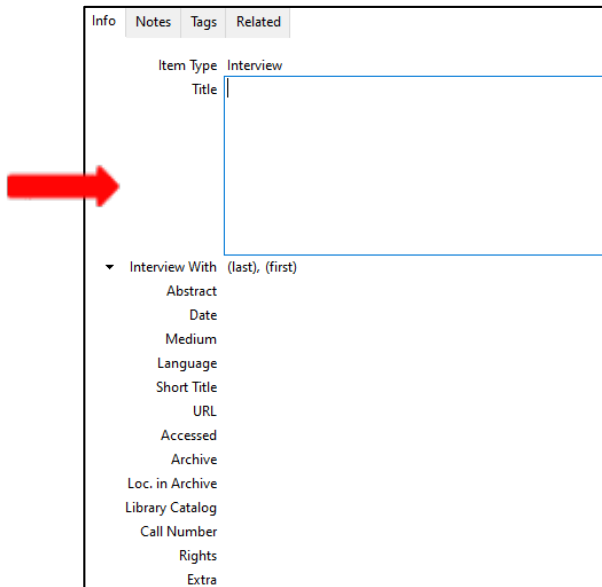

B. Metadata- Manual Entry

   i. When in Zotero, click on the ⊕ icon.

   ii. Choose type/source of reference from the drop-down. If required, click **More** to choose from additional types/sources.
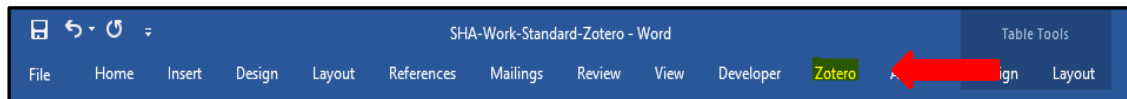
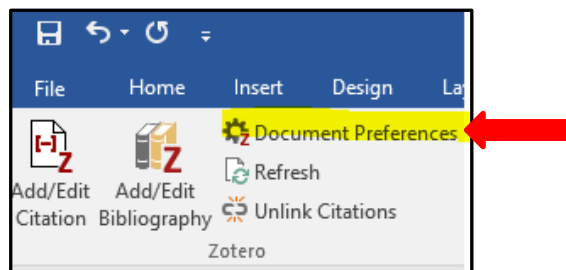iii. Enter the reference's bibliographic information into the area found in the far right-hand column.

Info	Notes	Tags	Related

Item Type Interview
Title

▼ Interview With (last), (first)
Abstract
Date
Medium
Language
Short Title
URL
Accessed
Archive
Loc. in Archive
Library Catalog
Call Number
Rights
Extra

CITING AND REFERENCING IN WORD DOCUMENT ZOTERO TUTORIAL IN-TEXT CITATIONS

| 20.	**In-Text Citation:** a) When installed, *Zotero* will appear in *Word Document* tool bar. SHA-Work-Standard-Zotero - Word Table Tools File Home Insert Design Layout References Mailings Review View Developer Zotero ...ign Layout b) Click on *Document* Preferences. File Home Insert Design La... Add/Edit Citation Add/Edit Bibliography Document Preferences Refresh Unlink Citations Zotero

c) Scroll down and select *Vancouver Style* and click *OK*
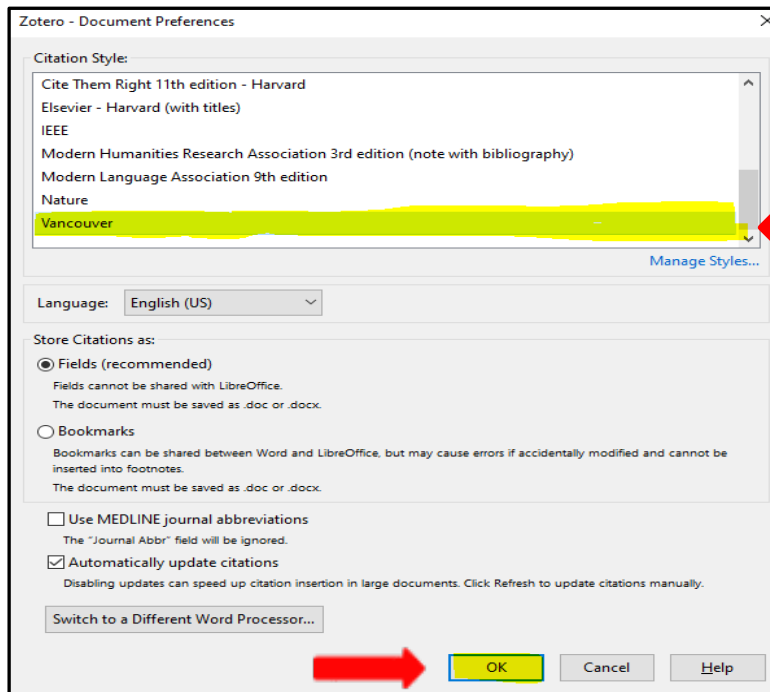
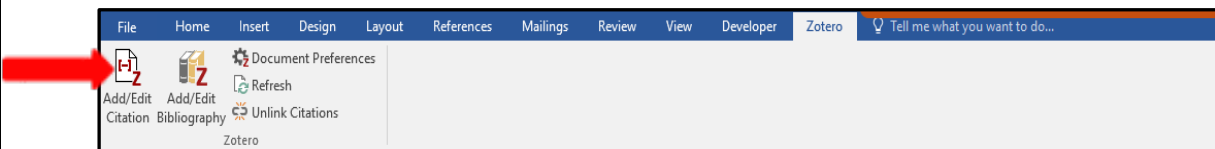d) Click on *Zotero* to reveal *Add/Edit Citation.*
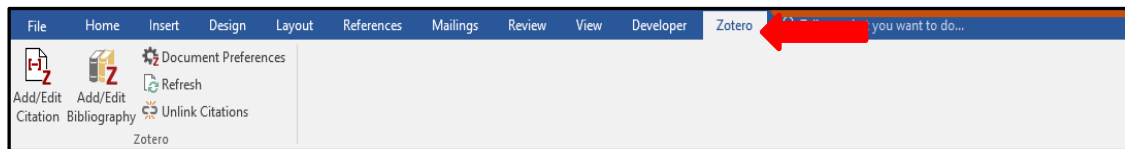
e) Place your cursor at the end of the desired sentence to add the citation.
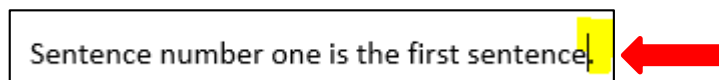
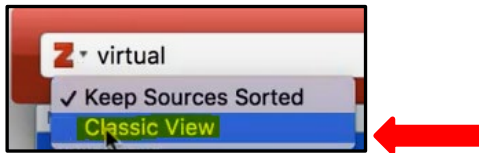f) Click on *Add/Edit Citation* icon found in tool bar.
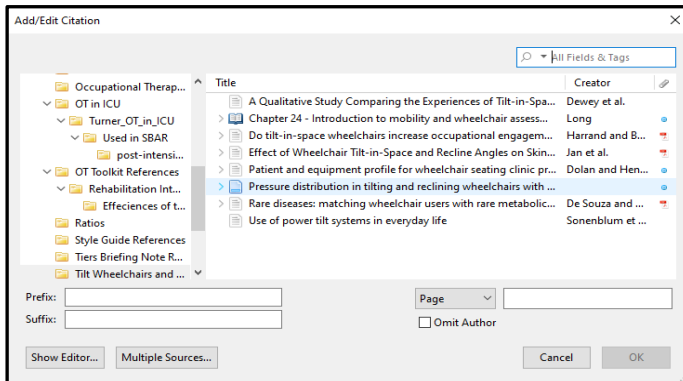

- The following will appear.

g) Search by name/title or author **OR**

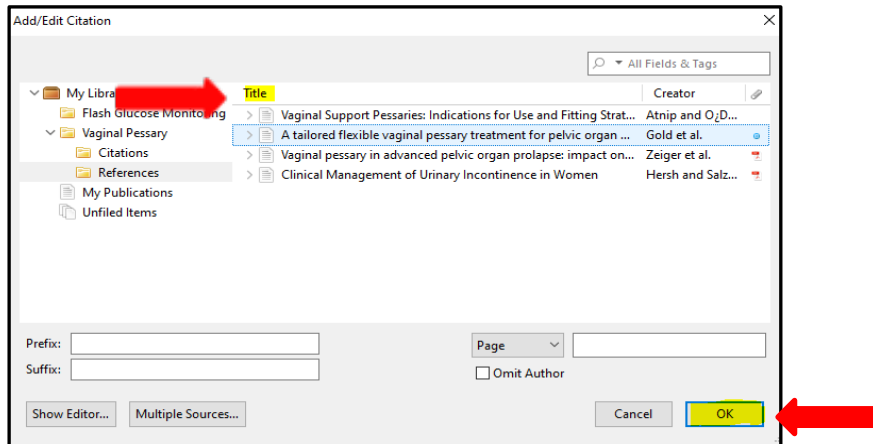h) Click on and choose *Classic View* to reveal Collection

i) *Single Source* or *Multiple Sources* (see steps below)

A. _Single Source:_
    i)   Select source in _Title_ section.
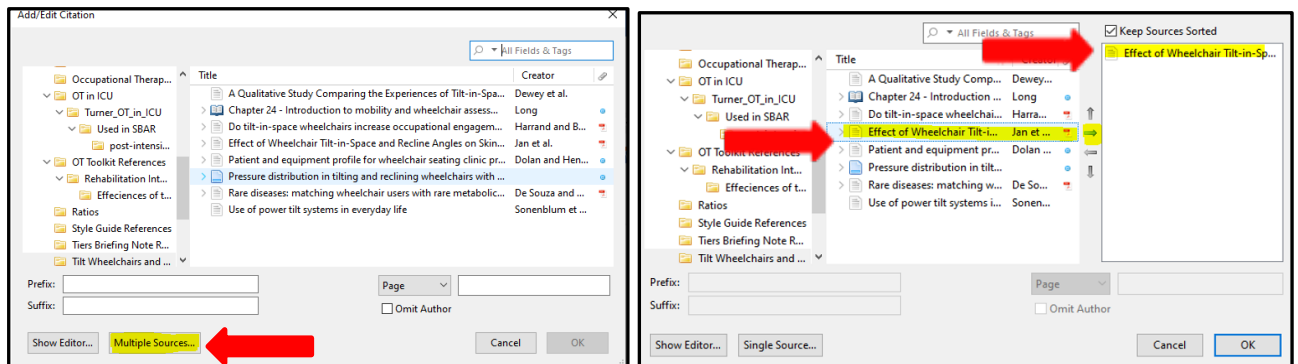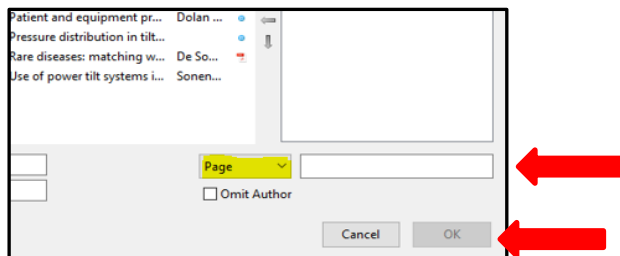   ii)   Click _OK._

B. _Multiple Sources:_
    i)   Select **_Multiple Sources._**
    ii)   Select each applicable sources in _Title_ section.
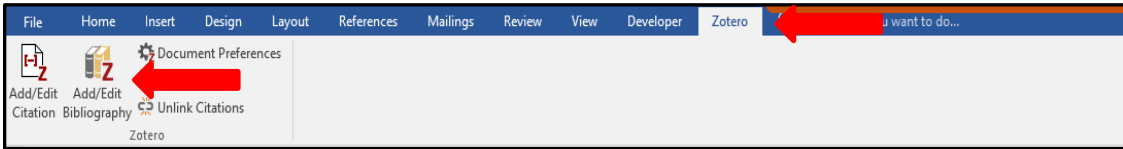   iii) Use ➡ to move into right-hand column

NOTE: You can only move one source over at a time.

    iv) Once all applicable sources are located in the right-hand column, select **_OK._**

    v)   Add a page number then click **_OK_**.

20.	j) Citation will appear in document in Vancouver Style.
	Sentence number one is the first sentence (1)
21.	**Referencing**:
	a) To add references or a bibliography to a Word Document, click on *Zotero* to reveal *Add/Edit Bibliography.*
	b) Click on *Add/Edit Bibliography* icon found in tool bar.
	c) References will be correctly inserted in the Vancouver Style format.
	1. Jan YK, Jones MA, Rabadi MH, Foreman RD, Thiessen A. Effect of Wheelchair Tilt-in-Space and Recline Angles on Skin Perfusion Over the Ischial Tuberosity in People With Spinal Cord Injury. Arch Phys Med Rehabil. 2010 Nov 1;91(11):1758–64.

Supplies:

- Mouse
- Keyboard
- Internet access
- Desktop/Monitor

Additional resources:

- **Vancouver Reference: Condensed Guide**
- **Zotero Tutorial- Attachments and Notes**
- **Zotero Support**
- **Zotero Frequently Asked Questions**
- **Zotero- Additional Tips and Tricks**
- **library@saskhealthauthority.ca**