



Zotero 6

Citing with the Zotero Word Add-In (Mac and Windows)

25.03.2022

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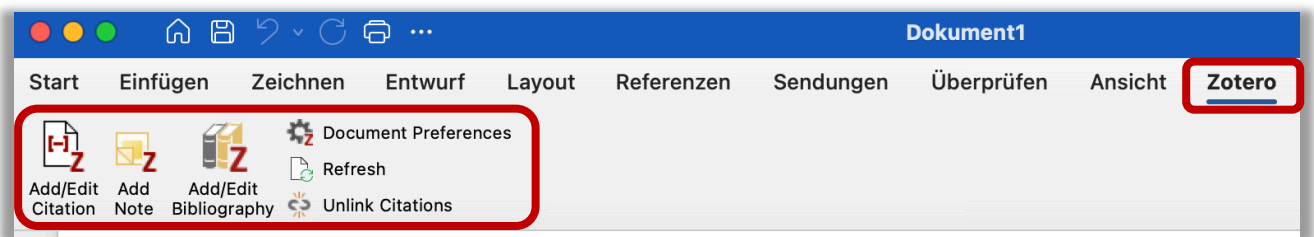
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Notes

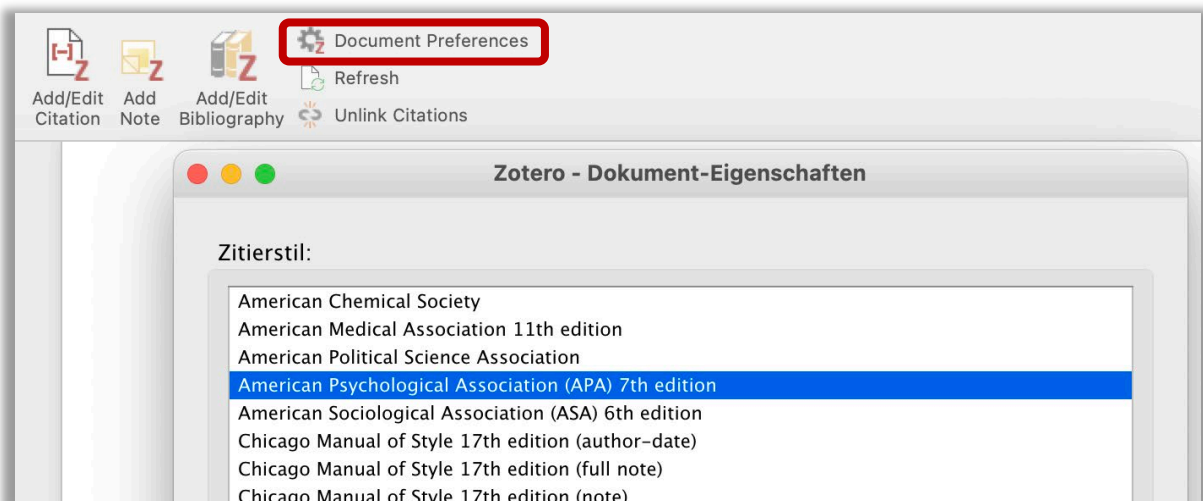
This guide refers to the Zotero plugins for Microsoft Word for Mac and Windows, which are included in the installation of Zotero 5 (macOS and Windows, respectively), see <https://www.zotero.org/download/>.

Start Plugin



After installing Zotero 6, you will find the Zotero tab in the Word menu bar with the Zotero functions.

Set Citation Style

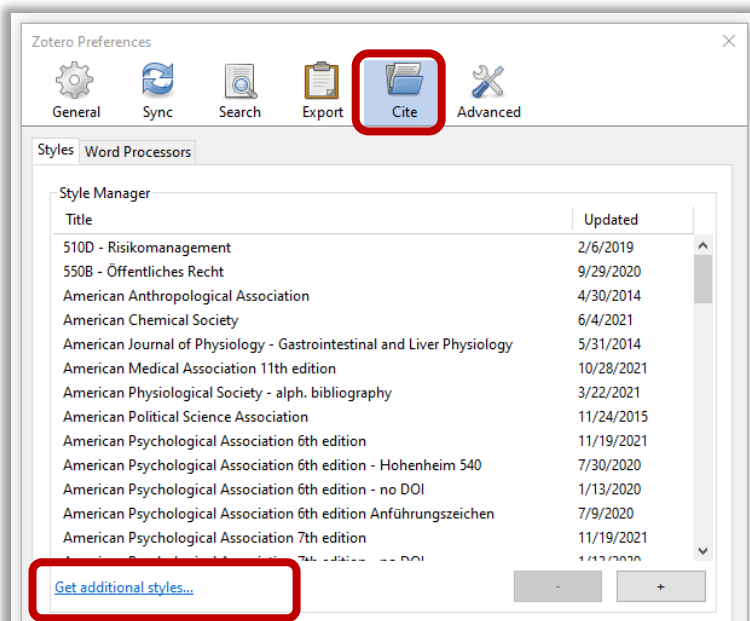


Use the gear icon / "Document Preferences" to select a citation style for your document. This setting causes all citations in the text or footnotes as well as the bibliography in your document to be displayed immediately

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in the selected citation format. If necessary, you can set a different style at any time. (Note: However, it is advisable to decide on a particular style as early as possible when writing a thesis).

If the citation style you need is not in the list of styles, go to Settings in the Zotero program (not in Word) (**Mac:** Zotero → Preferences, **Windows:** Edit → Preferences) → Cite → Styles → Get additional styles.



From there, you can access the Zotero Style Repository with over 10,000 available styles, which you can search by title, format, or field (of research). The styles found there can be easily added to your list of citation styles with a click.

Cite and Edit Citations in your Document

Place the cursor in the text where you want to insert the citation.

Click Add/Edit Citation in the Zotero bar.

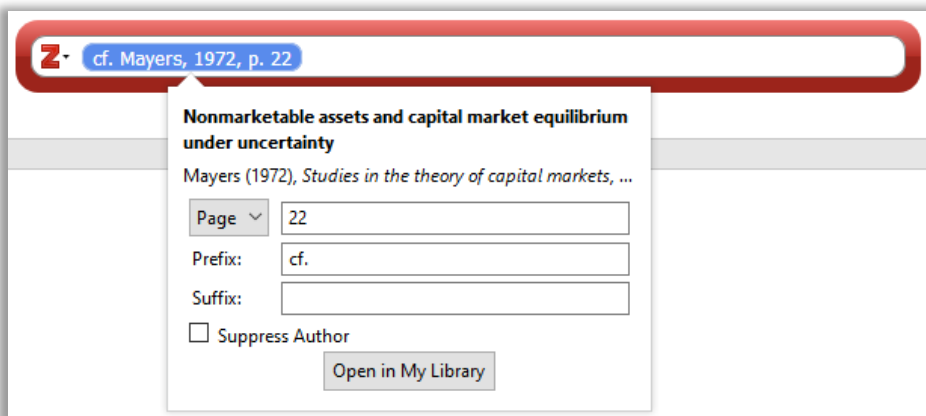
A search box opens, allowing you to search your Zotero database for the reference you want to cite. As you type the search term, hits from your database will be directly suggested:



You can select multiple references that will appear in one position in the text in the previously set output format.

When you select a reference in the red framed window, you can make additional entries: special page numbers (chapters etc.), prefix, suffix, suppress author.

By clicking "Open in My Library" you go directly to your Zotero database, where you can make basic corrections.

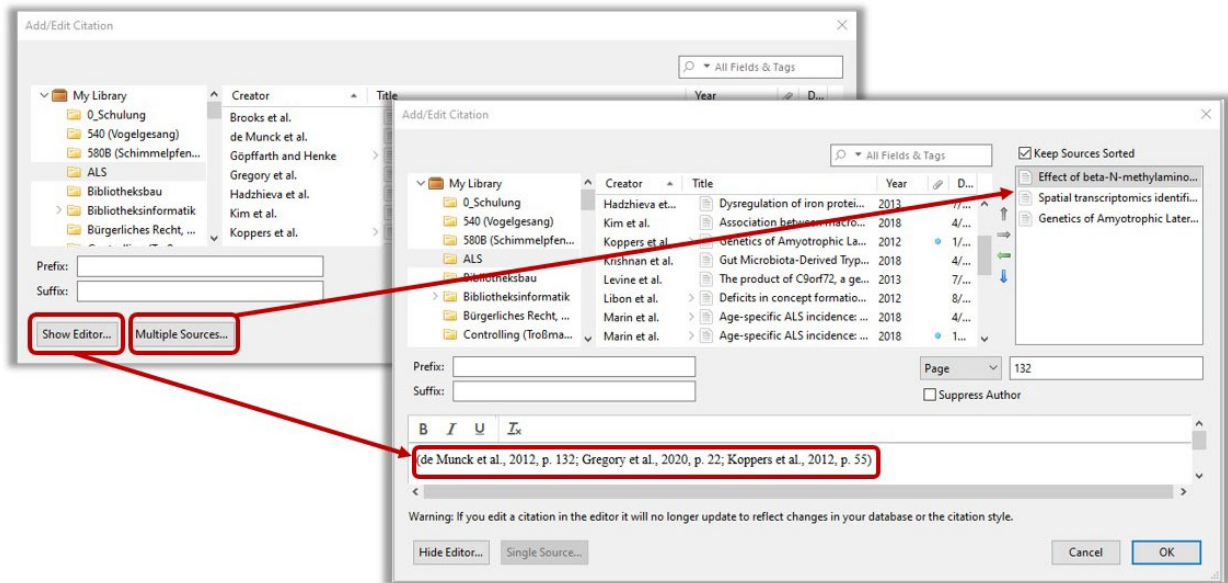


Clicking the **Z** takes you to the classic "Add / Edit Citation" view, which you can use not only as an alternative to inserting, but also for further editing of references in the text.

Via the editor field, which you can display, your edits are directly visible.

Using the "Multiple Sources" button you can organize and sort the in-text citations with multiple references.

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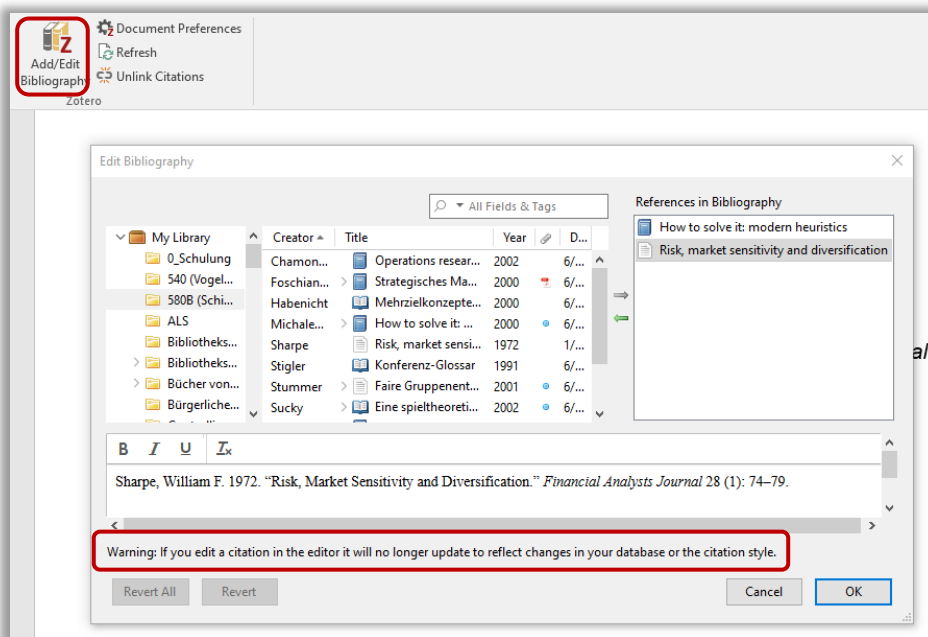


Warning: Any manual changes in the editor (i.e. not prefix, suffix, page etc.) will no longer be updated if you make changes to the database or citation style (see note text in the window!).

It is therefore recommended to make major or fundamental changes via the style or the Zotero database rather than in the editor field.

Create and Edit a Bibliography

Place the cursor in the text where you want to insert the bibliography. Click Add/Edit Bibliography in the Zotero panel. According to the previously selected citation style, the bibliography is generated and placed in the text. You can change the structure and sorting of the bibliography to some extent via "Edit Bibliography", such as removing individual citations, adding them separately or editing citations in the editor.



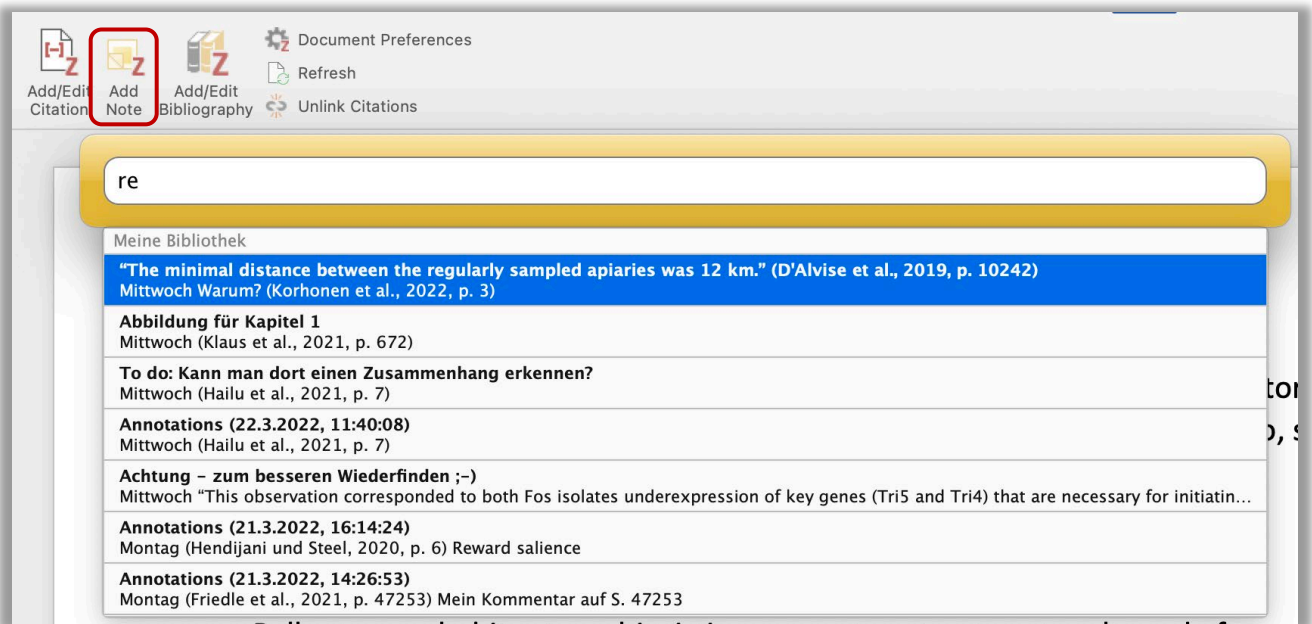
Same here:

Warning: If you edit a citation in the editor window, it will no longer be updated if you make changes to the database or the citation style (see warning text under the editing window).

Basic changes in the view of the bibliography should therefore be defined via the citation style.

Add Zotero Notes to Word Document

Place the cursor in the text where you want to insert notes saved in Zotero. Click Add Note in the Zotero panel. You will see all your notes in the pull-down menu, or you can search with keywords from your note texts in the yellow-framed search field.



The entire content of the selected note will be inserted into your Word document, where you can then further edit it (e.g. create references for the table of figures, etc.).

References contained in the notes are automatically added to the bibliography.

Example of note taken from a highlighted text in PDF (direct quotation):

"This observation corresponded to both Fos isolates underexpression of key genes (Tri5 and Tri4) that are necessary for initiating the Fusarium trichothecene biosynthesis pathway."
(Anteyi et al., 2022, p. 12)

If you have transferred entire images (marked areas in the PDF) to your notes, you can create image citations quite easily.

Likewise, you can prewrite entire text passages in the Zotero notes, which you can then add in Word via "Add Note" (e.g. if you work on the go with the iOS Zotero app).



Save Document / Remove Field Codes

Save the changes in your document regularly.

You should also create backup copies on at least one external data storage device (flash drive, cloud directory).

You may want or need to submit a version without field codes at the end of your work. In the Zotero panel, the "Unlink Citations" function permanently removes the field codes stored in citations and in the bibliography. You will no longer be able to edit your document with Zotero.

Therefore, it is strongly recommended to save a copy of the document with field codes / with linked citations beforehand.

Also remember to backup your Zotero database. You can find the location in Preferences (**Mac**: Zotero → Preferences, **Windows**: Edit → Preferences) → Advanced → Files and Folders → Data Directory Location. Backup the Zotero directory shown there to an external location as well.

Questions and change requests?

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