

Managing References With Zotero Standalone & Microsoft Word

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Introduction

The Faculty of Technology, Obafemi Awolowo University uses a variant of the Harvard (author-date) referencing style. The Faculty referencing style guide is located at http://www.oautekconf.org/oau_style_guide.pdf.

All manuscripts submitted for presentation at the Faculty's International Conference and theses submitted for processing to the Postgraduate College are required to use the OAU Faculty of Technology Harvard format for citing and listing their references. In the past, authors managed their in-text citations and lists of references by hand. Authors are now required to use reference management packages.

This document is a how-to guide to using Zotero Standalone and Microsoft Word (for reference management and word processing respectively) on the Windows operating system. There are good alternatives in all three categories of software, but the above are the leading products in their categories, and are therefore recommended. How-to guides targeting other combinations of reference managers, word processors, and operating systems will be developed in the future.

Requirements

1. Windows operating system
2. MS Word 2003 or above
3. Zotero Standalone
4. A browser (Chrome, Safari, Firefox recommended)

I. Installations and Setup

1. Install MS Word
2. Install Zotero Standalone

- a. Download Zotero standalone

Download here https://download.zotero.org/standalone/4.0.29.17/Zotero-4.0.29.17_setup.exe

If you run into any problems with the above link, visit <https://www.zotero.org/download/> and click on "Download Zotero for Windows".

b. Install Zotero

The installation is straightforward. After installing, a new tab named “Zotero” should appear in the MS Word ribbon (Figure 1).

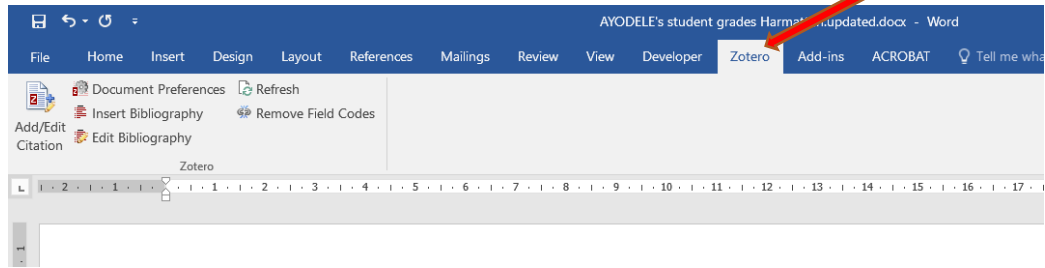


Figure 1

3. **Install a browser extension:**

Visit <https://www.zotero.org/download/>. Depending on your browser (if you are not using Chrome, Safari or Firefox, move to one of them now), click on one of the links under “*Next, add one of the following browser extensions.*”

After the installation, an icon should appear at the top of your browser. For example, the interface of Chrome is shown below:

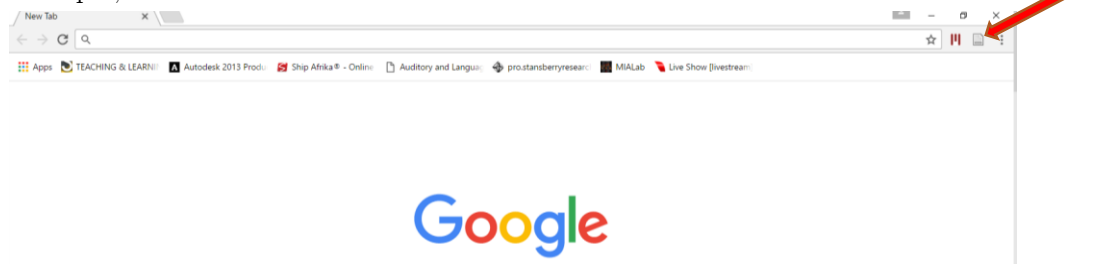


Figure 2

4. **Download OAU Faculty of Technology style template into Zotero**

A template for the Faculty of Technology reference style is located online. This template can be used by a large number of reference management packages.

- a. Enter <http://www.zotero.org/styles/obafemi-awolowo-university-faculty-of-technology> into your browser address bar and hit the ENTER key on your keyboard¹. A file download should start, with the file named *obafemi-awolowo-university-faculty-of-technology.csl*. Save this file somewhere on your system.
- b. Launch Zotero Standalone if it is not already running.
- c. In the Zotero menu bar, click on “Tools” and select “Preferences”. The window in Figure 3 should come up.

¹ Note that the address contains no spaces, and the “dash” symbols are hyphens, NOT underscores.

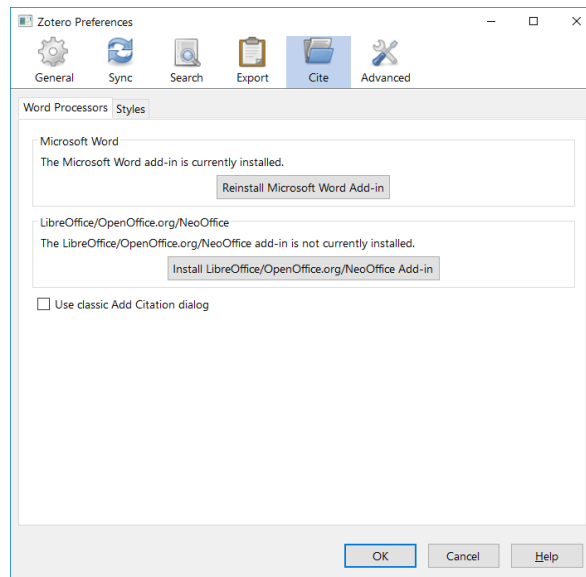


Figure 3

- d. Click to select the checkbox beside “Use classic Add Citation dialog”.
- e. Click on the “Styles” tab.

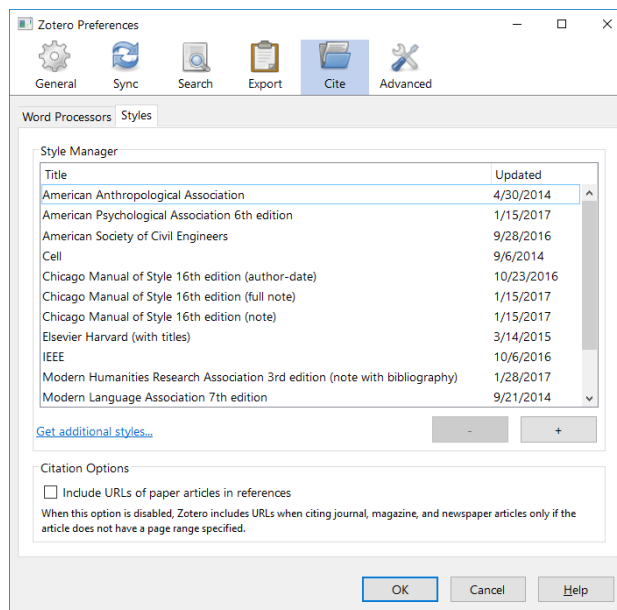


Figure 4

- f. Click on the button with the caption “+”, and browse to the location of the csl file you downloaded in step a.
- g. Click “Install” when asked if you want to install the template, and click ok.
- h. Your Zotero and MS Word are now fully configured to work with references in the OAU Faculty of Technology format.

II. Working with References

The process of using Zotero for reference management starts with the identification of you intend to cite in your manuscript. You then download the citations for the publications into Zotero from your browser. Once the reference is in Zotero's database, you can insert citations into your Word document, and create reference lists formatted in conformity with the Faculty of Technology referencing style guide.

1. Create collection for project

- a. Zotero allows you to organize your references. You can create a collection for each manuscript.
- b. In the left pane of the Zotero window, right-click on "My Library" and select "New Collection".
- c. Enter a name for the collection, e.g. "My MSc thesis" or "OAUtekConf1 Paper", and click "OK".
- d. Your new collection should now be listed under My Library.
- e. Highlight it, to be sure that all imported references are put in this collection.

2. Download citations into collection

- f. Open, using the browser in which you installed Zotero extension, the Google Scholar site (scholar.google.com).
- g. Perform a search using the title of the paper for which you wish to get a citation. You could also perform a general search in an area of interest.
- h. For example, Figure 4 shows the window when a search for "laminar flow" was done.

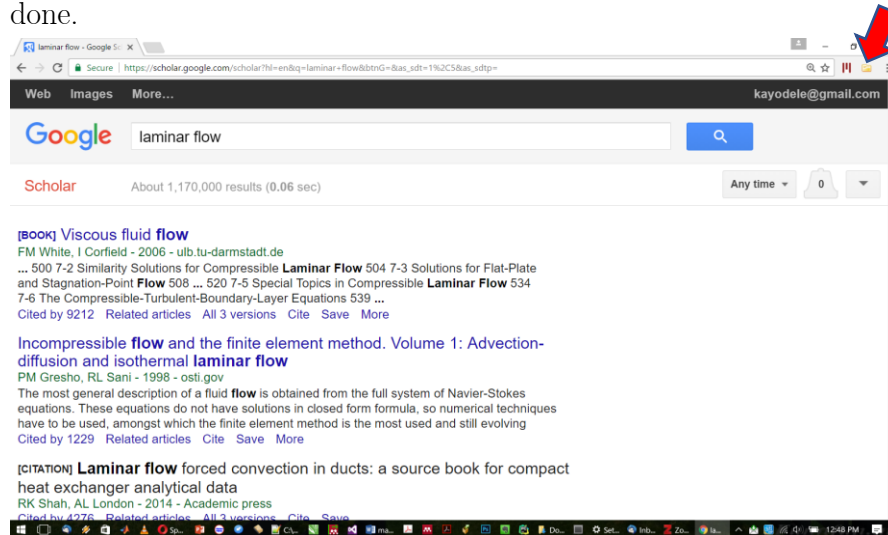


Figure 5

- i. At the top of the browser window, click on the Zotero extension button (indicated by an arrow in Figure 5).
- j. The Zotero Item Selector dialog box should pop up (Figure 6)
- k. Select items for which you wish to download citations, and click "OK".

1. The references should now be in Zotero.

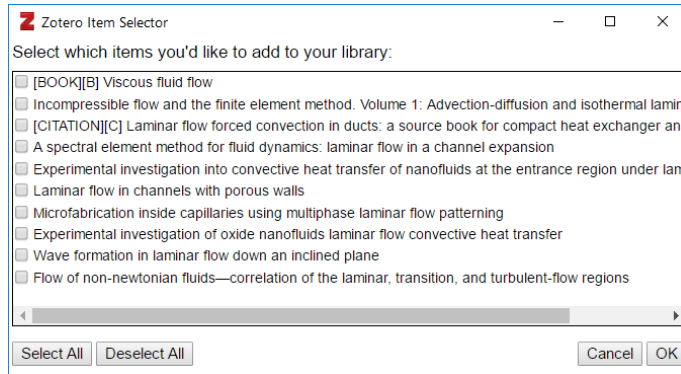


Figure 6

2. Define citation style

- a. In MS Word, select the Zotero ribbon, and click “Document Preferences”. The window in Figure 7 should come up.

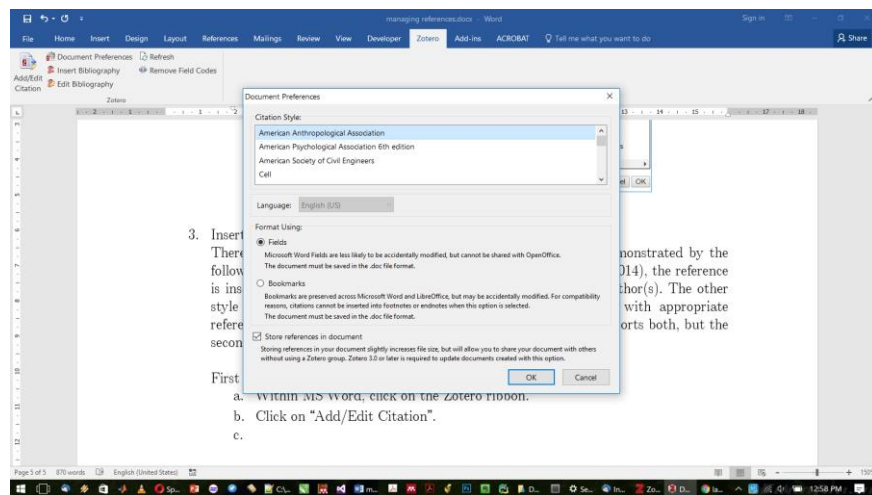


Figure 7

- b. Under “Citation Style”, look for Obafemi Awolowo University – Faculty of Technology”, highlight it, and click “OK”.

3. Insert citations into write-up

To work with references, you must have both MS Word and Zotero standalone running.

There are two common styles for inserting citations in-text, as demonstrated by the following two sentences. In one style, once used by Nobody et al. (2014), the reference is inserted as a part of the sentence by directly referring to the author(s). The other style features a sentence which makes an assertion or a point, with appropriate references inserted in parenthesis (Nobody et al., 2014). Zotero supports both, but the second style is easier to use.

First Style

- a. Within MS Word, click on the Zotero ribbon.

- b. Click on “Add/Edit Citation”. The window in Figure 8 shows up.
- c. Select the citation of interest and click “OK” if you are only citing the one reference. If you wish to cite multiple sources together, do NOT click “OK” yet.

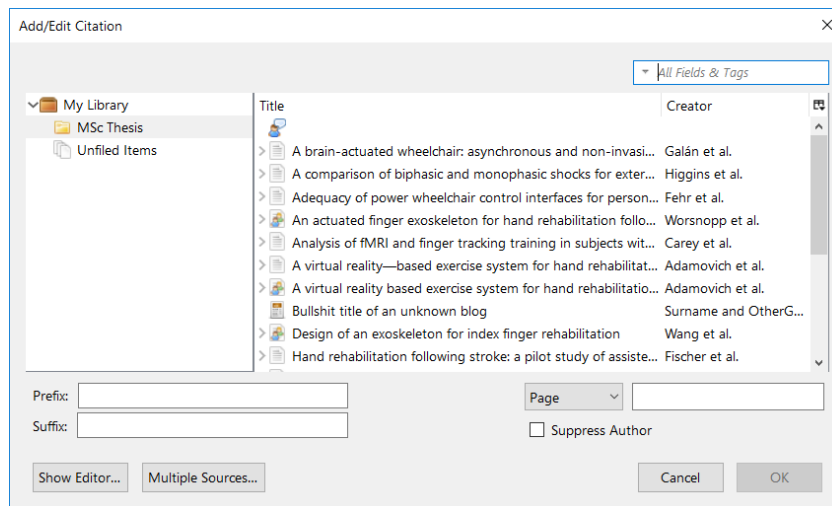


Figure 8

- d. Click on “multiple sources”, and the window should change to something similar to Figure 9.
- e. Now, you can highlight references in the middle pane, and use any of the FOUR arrows between the middle and right panes to add or remove citations, or change the order in which they are cited.

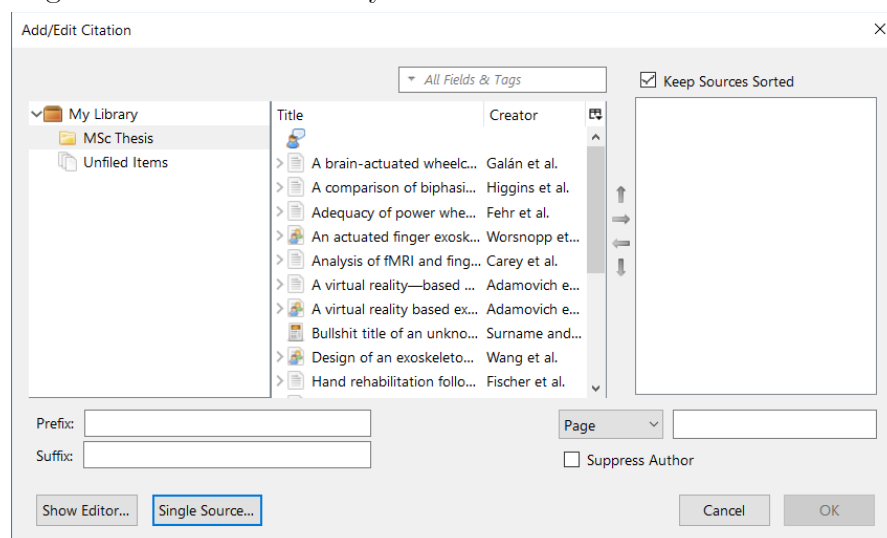


Figure 9

- f. When you are done, click “OK”.

Second Style

- a. For the second style of citations, proceed as above, but with one major difference.
- b. Click on “Suppress Author” in the windows shown in Figures 8 or 9.

- c. Rather unfortunately, Zotero would then require you to manually type in the authors' names to accompany the year of publication, which is the only thing that will appear in parentheses.

4. Modify citations

To modify citations, simply highlight them, and call up the "Add/Edit Citations" dialog box.

5. Create Reference List

The really fun part of using Zotero for reference management comes when you need to populate your reference list.

- c. Using the mouse, set the caret (the blinking symbol that indicates where the next character you input into Word will appear) wherever you wish the reference list to appear.
- d. In the Zotero ribbon, click "Insert Bibliography".
- e. A nicely-ordered and formatted list of your references should appear.