Using Zotero

With the Australian Guide to Legal Citations (AGLC), 4th ed.

User Guide

UTS Library
University of Technology Sydney

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Introduction

What is Zotero?

Zotero is a reference management application designed to collect, store, share, manage and cite references.

- It automatically senses content in your web browser, allowing you to add it to your personal library with a single click.

- By creating a Zotero online account you can then sync your Zotero library to the cloud and between computers. It also allows for sharing of references between accounts.

⚠️ **Using the Australian Guide to Legal Citations (AGLC) style with Zotero**

If you are using the AGLC style with Zotero, please note the following:

- Zotero does not always work well with AGLC.

- Anything outside of Books, Journal Articles, Web pages, Cases or Legislation will need to be entered manually in Zotero.

- For many legal resources, there are no Zotero template. For example, it is not possible to enter conventions or treaties using the AGLC4 style in Zotero – so you will need to insert these citations manually in Microsoft Word.

Downloading and setting up Zotero

Installing Zotero 5.0 Application in your Windows PC

- Go to Zotero Download site: https://www.zotero.org/download/

- Click **Download**

Zotero Installation file (.exe) should download to your PC, most likely in your PC's **Downloads** folder.
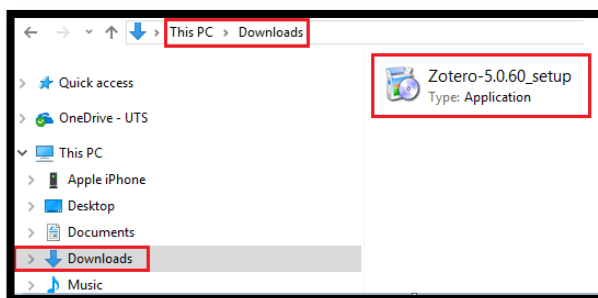
- Run the installation files. Follow prompts.

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- The Zotero **My Library** will launch. It should look something like this:
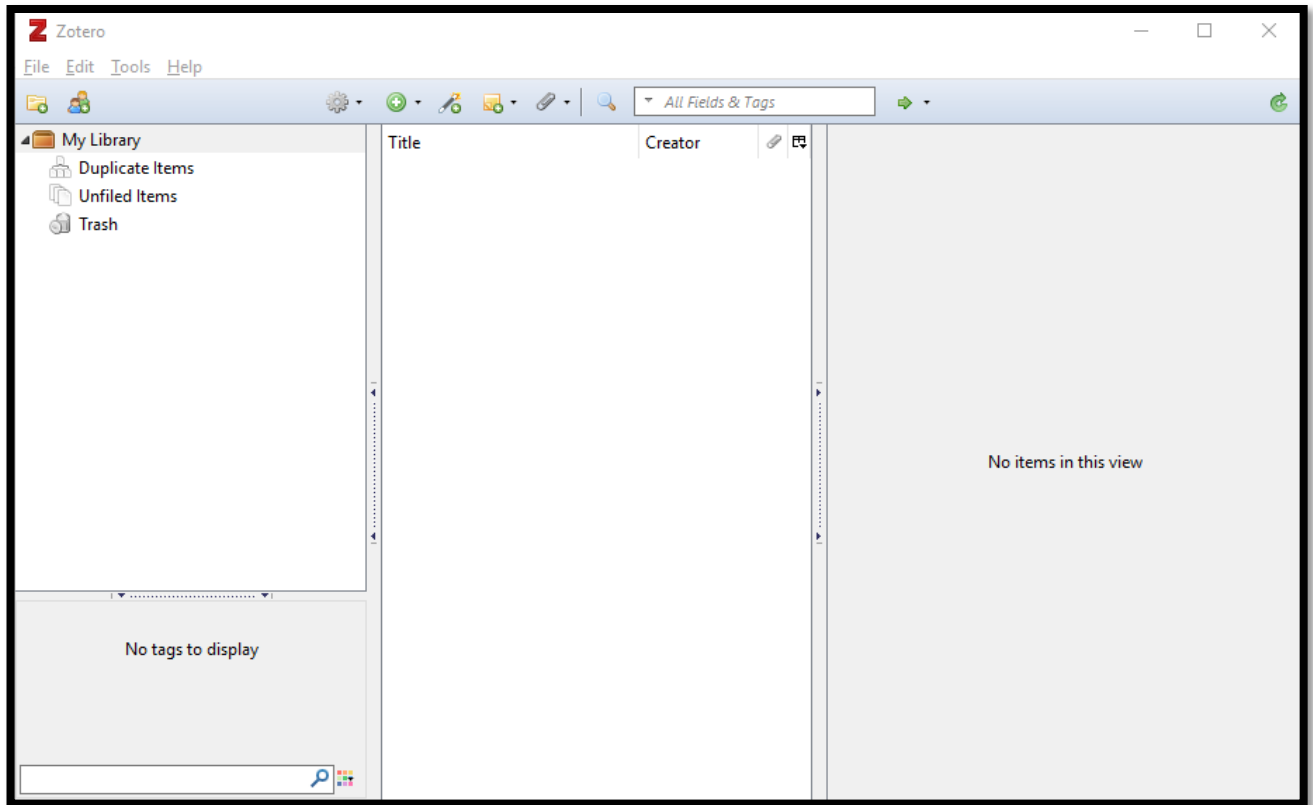
Zotero 5.0 has been successfully installed.

Installing Zotero 5.0 Application in your Apple Macintosh

What you will need:

- Apple Macintosh computer running macOS 10.11 or later.
- Google Chrome (version 55 or later)
- Microsoft Word for Mac 2010-2021 or Office 365.

Your Mac's default security settings may prevent you from downloading and opening the Zotero installation files.

To avoid this from happening, go to:

Macintosh > System Preferences > Security & Privacy > Allow apps downloaded from > Tick the radio button next to **"App store and identified developers".**

Library
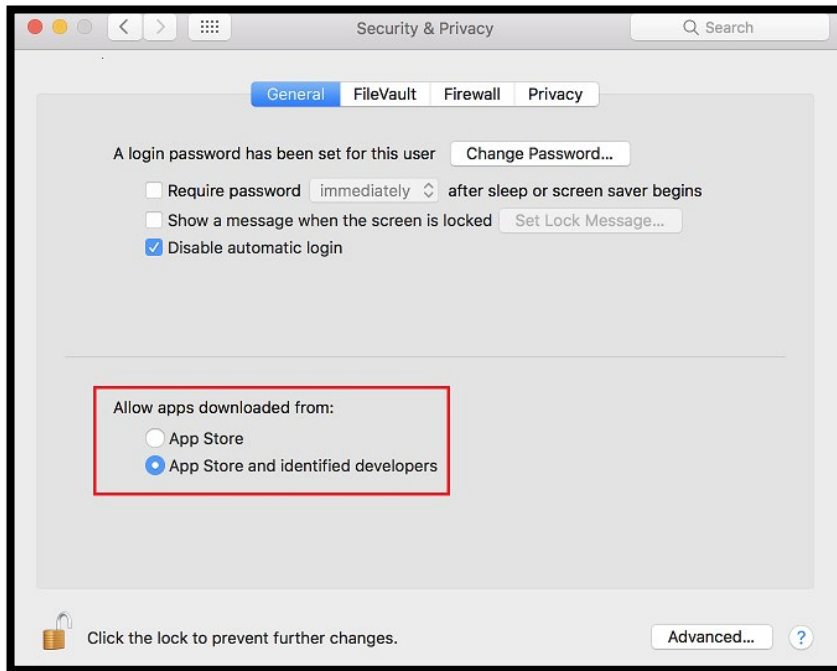
You should change it back to **"App Store"** once you have downloaded the required files.

- Quit Microsoft Word (if you have it open).
- Go to Zotero Download site: https://www.zotero.org/download/
- Click **Download**

Zotero Installation **Disk Image file (.dmg)** should download to your Mac, most likely in your Mac's **Downloads** folder.
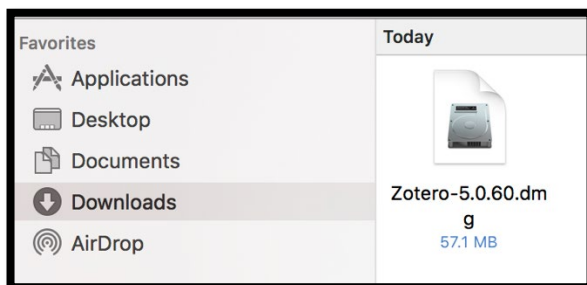
- Double click to open the disk image (.dmg) file

UTS Library
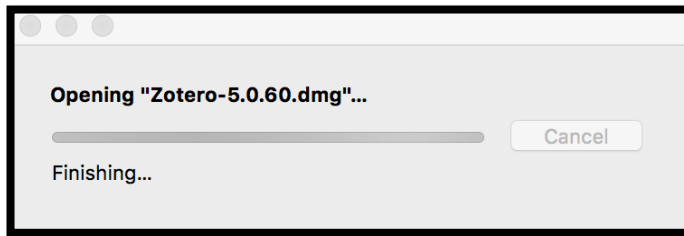
- Drag the Zotero icon to your Mac's **Applications** folder
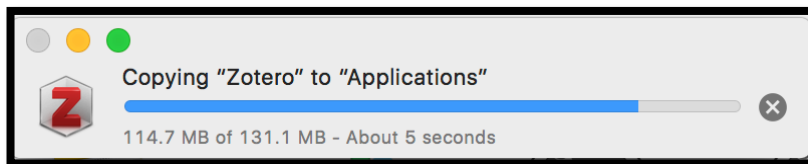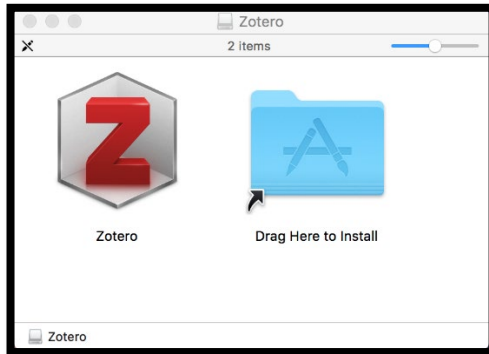
- Click **Open** if you are prompted with this warning message
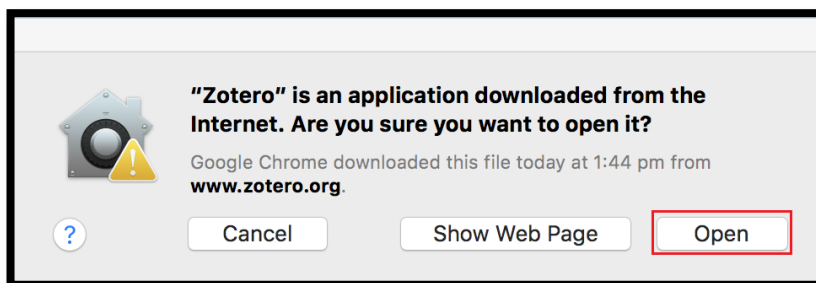
- Go to your Mac's **Applications** folder and find Zotero.
- **Double-click** on the Zotero icon to launch the application.
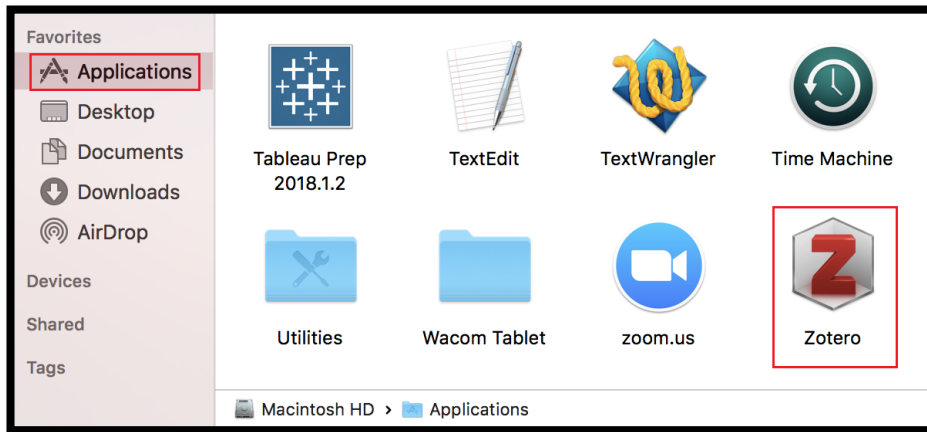
The Zotero **My Library** will launch. It should look something like this:
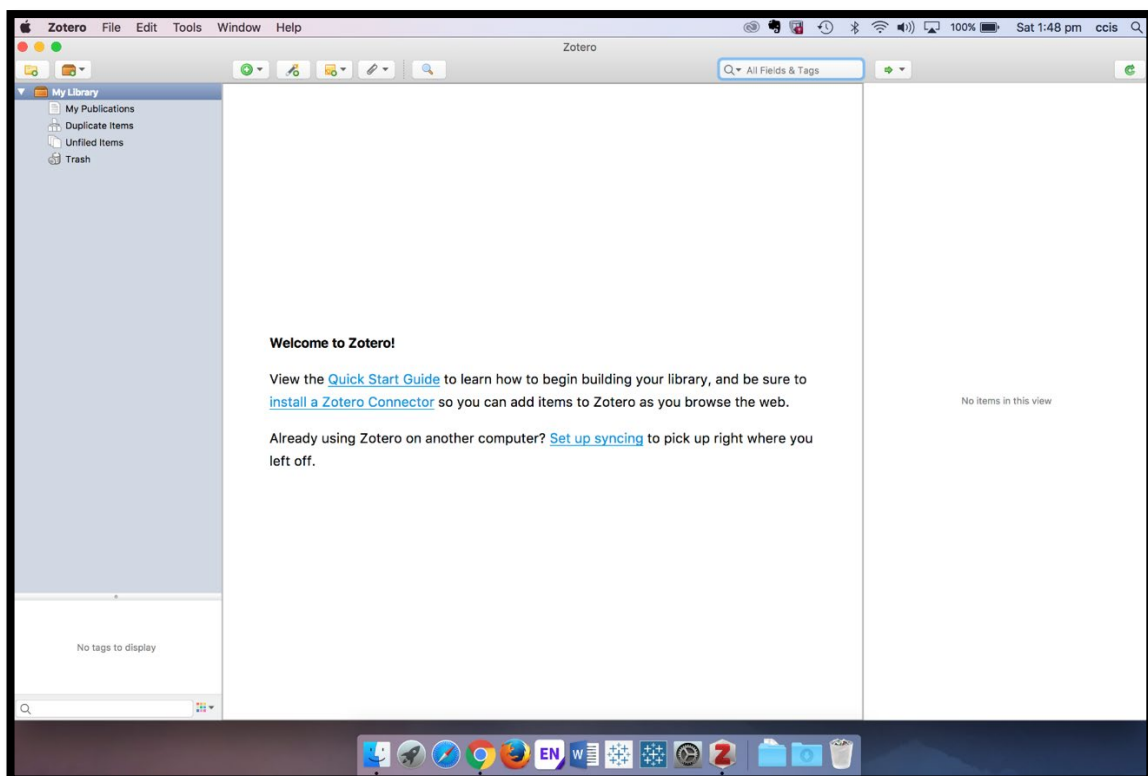
Zotero 5.0 has been successfully installed.

Installing Zotero Browser Connector for Chrome

Zotero has **Browser Connectors** for Safari, Chrome and Firefox.

In this example, we will be using the Chrome browser (you can download Chrome from https://www.google.com/chrome/ if you don't have it installed in your mac already).

- Open Chrome Browser
- Go to: https://www.zotero.org/download/
- Click on **Install Chrome Connector**

You will be taken to **Chrome Web Store**.

- Click **Add to Chrome**
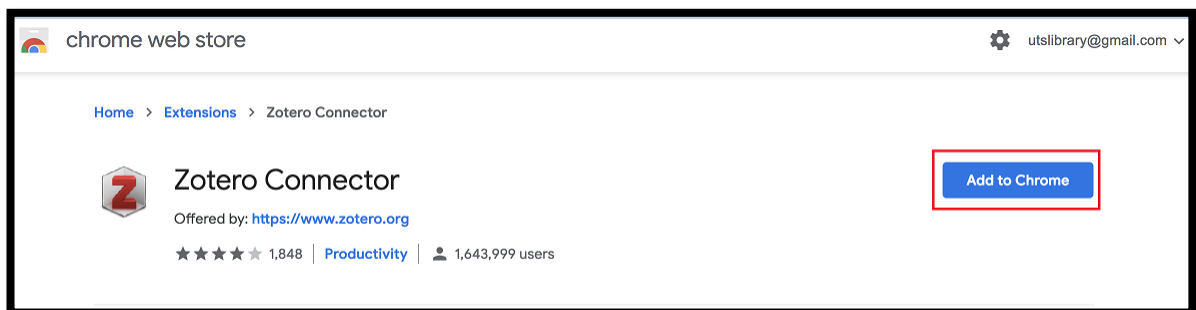
- If prompted, click **Add Extension**

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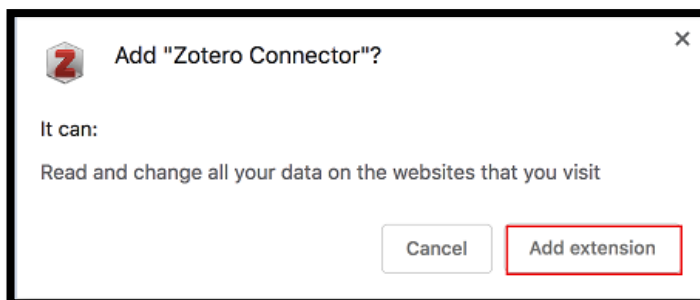
You should then get a confirmation message.
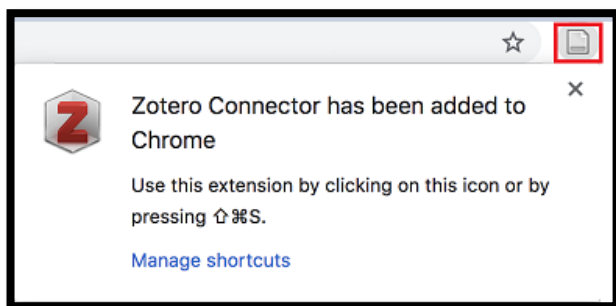
The newly installed **Zotero Browser Connector** will appear on the top right-hand-side of your Chrome browser

Zotero Browser Connector for Chrome has been successfully installed.

Adding AGLC as your preferred referencing style

If you are studying law at the University of Technology Sydney, you will probably be using [Australian Guide to Legal Citation (AGLC)](#) as your preferred referencing style.

You need to add AGLC to your Zotero Style list. To do that:

- Quit Microsoft Word (if it is open)
- Launch Zotero application
- From the top menu bar, click **Zotero** > **Preferences**
- Click on **Cite** > **Styles.**
- In *Style Manager*, **Command (⌘) + Click** each of the referencing style you are **not** going to use.
- Then click the **Minus (-)** button to get rid of them.
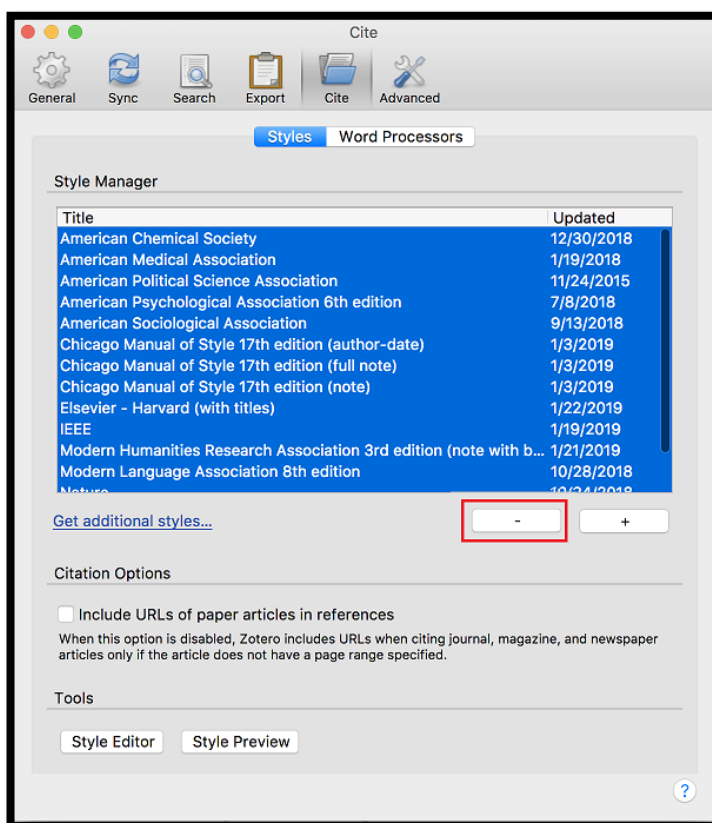
- Click **OK** to confirm
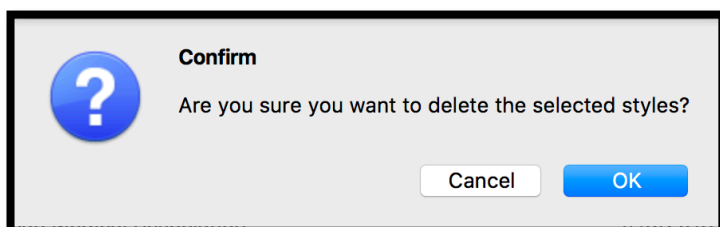
- Click on **Get Additional Style**
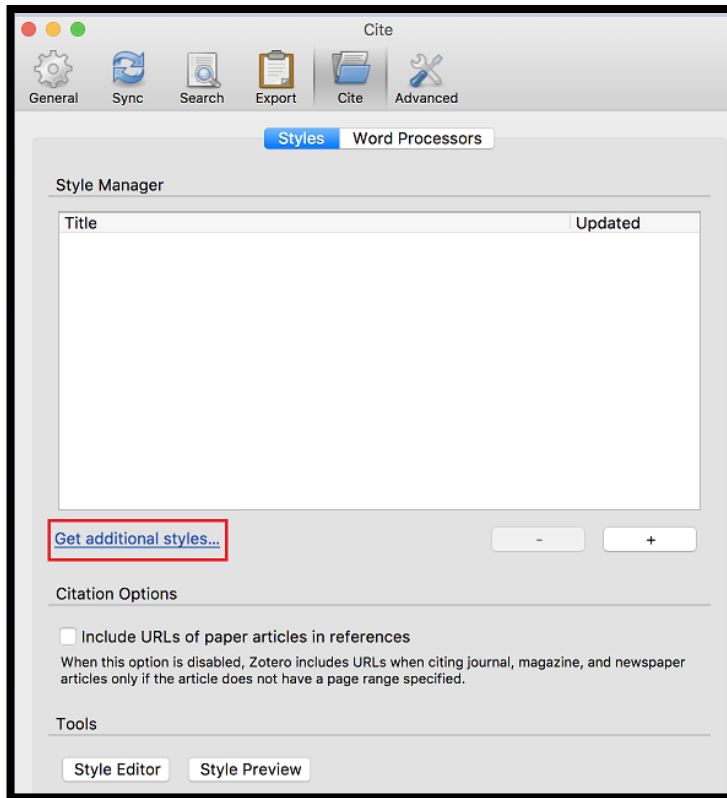
- In the **Zotero Style Repository**, search for **AGLC.** Then **click** on the **Australian Guide to Legal Citation** link.

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- AGLC will now be added to your Style Manager as the preferred referencing style. You may also want to tick the box next to **Include URLs of paper articles in references**.
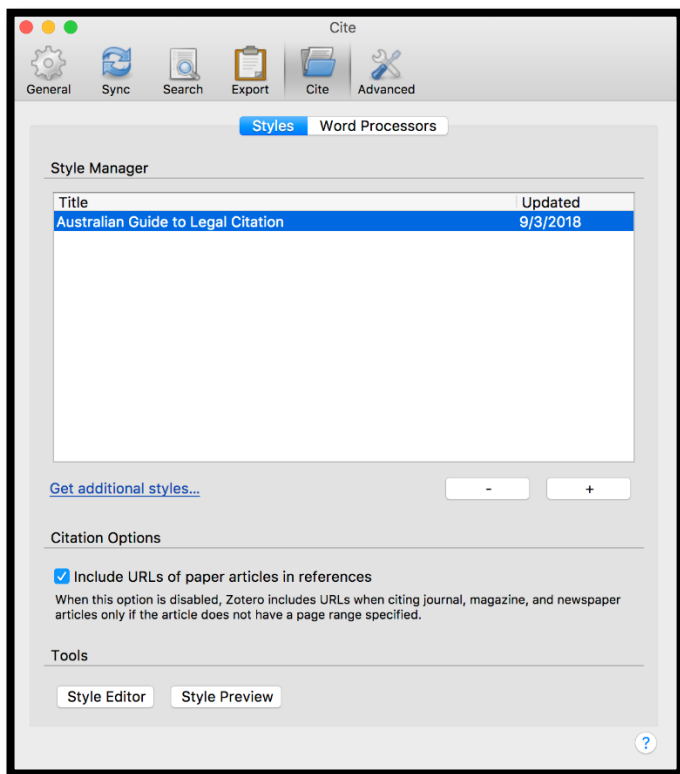
You have successfully added AGLC to your Zotero Style list and made it your preferred citation style.

Set up 'Data Syncing' for your Zotero Library

While Zotero stores all data locally on your computer by default, Zotero's sync functionality allows you to access your Zotero library on any computer with internet access.

Zotero syncing has two parts: **data syncing** and **file syncing**.

Free	**Data syncing** merges library items, notes, links, tags, etc.—everything except attachment files—between your local computer and the Zotero servers, allowing you to work with your data from any computer with Zotero installed. It also allows you to view your library online on zotero.org. Data syncing is free and has no storage limit. We recommend you **turn Data Syncing ON**.
Yearly subscription	**File syncing** syncs attached files (PDFs, audio and video files, images, etc.). To sync these attachments, you can set up file syncing. However, once you reach the 300 MB free storage limit, you will have to pay a yearly subscription fee to maintain and access your storage. If you don't want to pay for storage, you can **turn File Syncing OFF**.

The first step to **data syncing** your Zotero library is to create a Zotero account. To do that:

- Launch Zotero application
- From the top menu bar, click **Zotero** > **Preferences**
- Click on **Sync.**
- Then Click on **Create Account** (if you don't have a Zotero account yet)
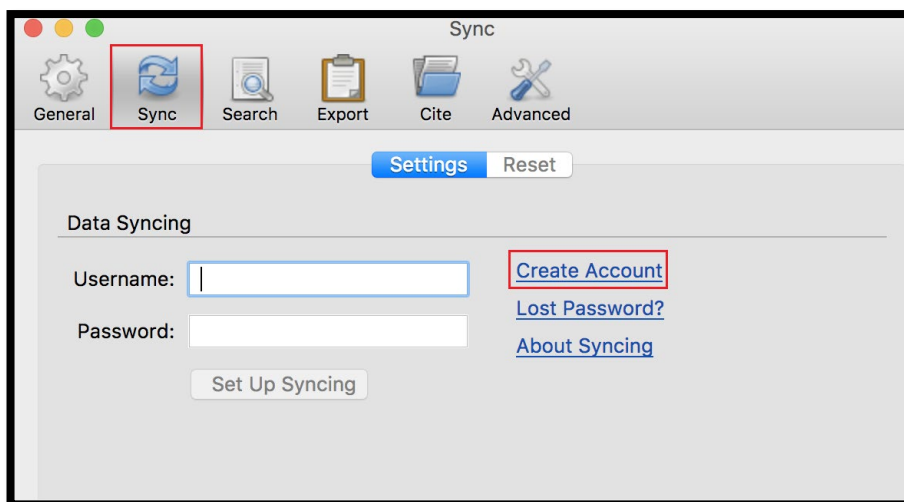
- Complete the **registration form**
- Zotero will send you a welcome email. You need to confirm your email address by clicking on the link in that email.

- Now go back to Zotero **Preferences** Panel.
- Click on **Sync.**
- Log in using your new Zotero **username** and **password**
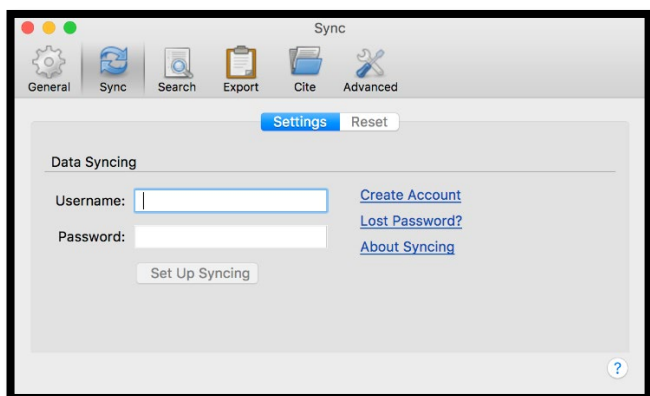
- **Turn ON Data Syncing, but turn OFF File Syncing** (unless you want to pay the yearly subscription fee for storage)
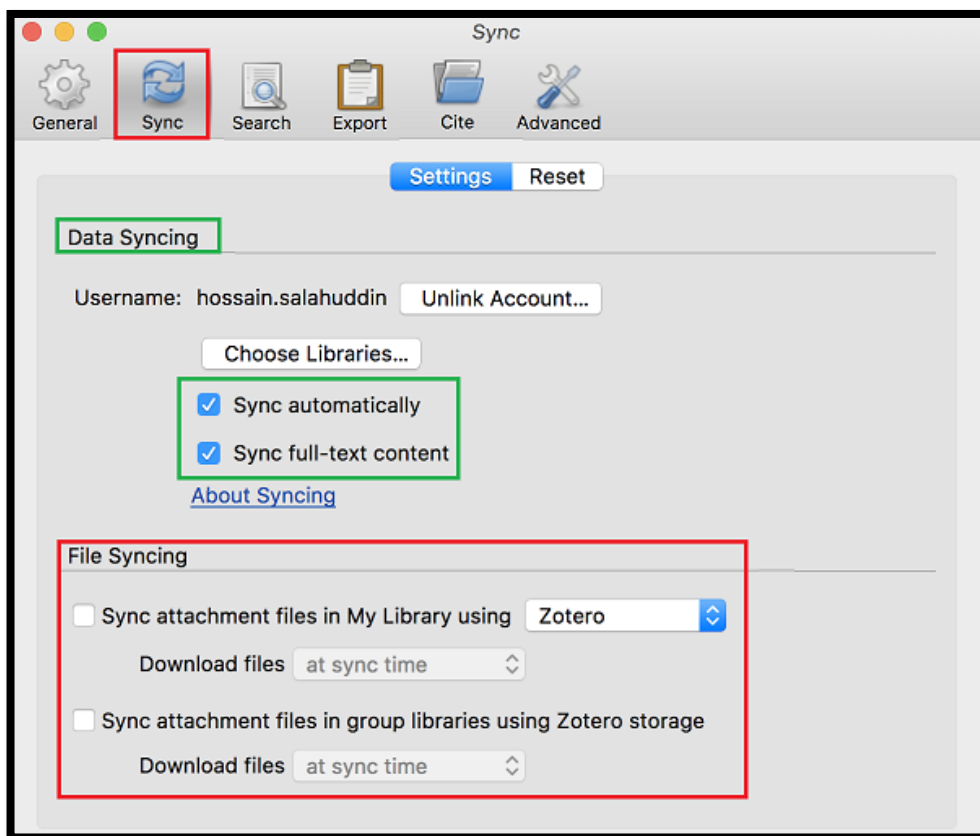
You have successfully set up **data Syncing** for your Zotero Library.

Add the UTS Library's OpenURL to Zotero

After importing references into Zotero from Google Scholar or other databases, you can then search for their full text in the UTS Library's collection.

To do that you need to add the UTS Library's OpenURL to Zotero.

- Launch Zotero application
- From the top menu bar, click **Zotero** > **Preferences**
- Click **Advanced**
- Under **OpenURL Resolver** field enter:
  https://search.lib.uts.edu.au/discovery/openurl?institution=61UTS_INST&vid=61UTS_INST:61UTS&
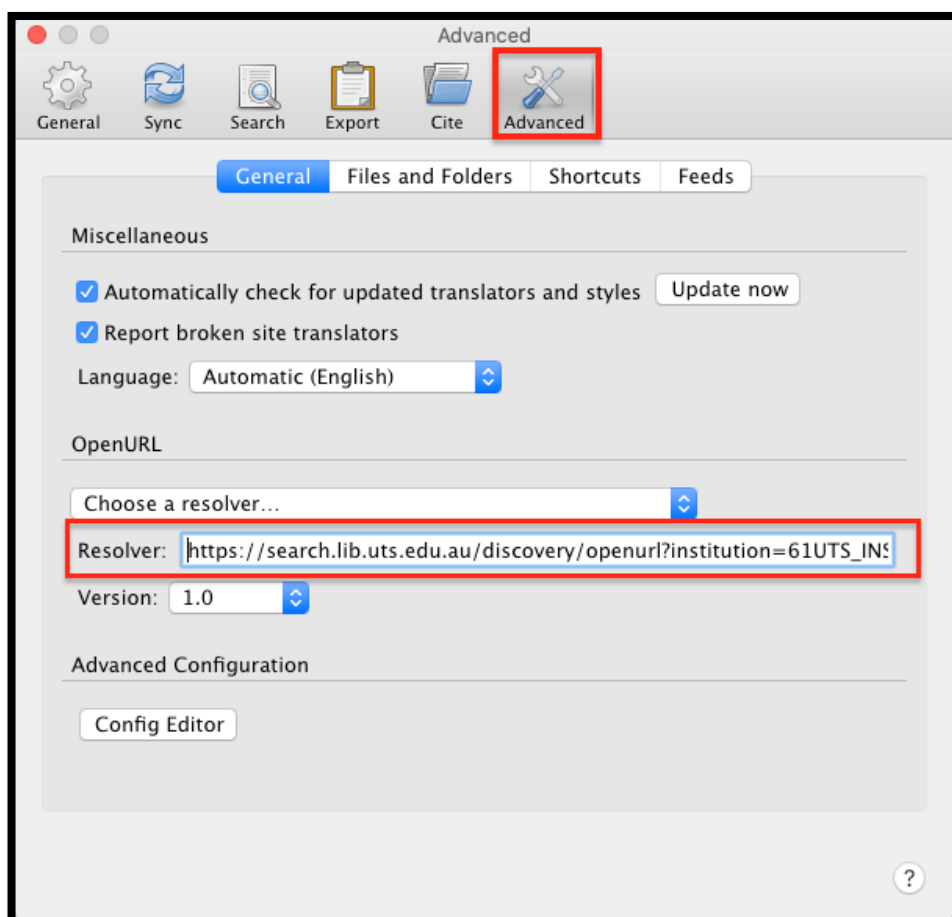
Now when you select an item in your Zotero Library, and then use the Library Lookup function within Zotero, it will search for the full text from UTS Library's collection.
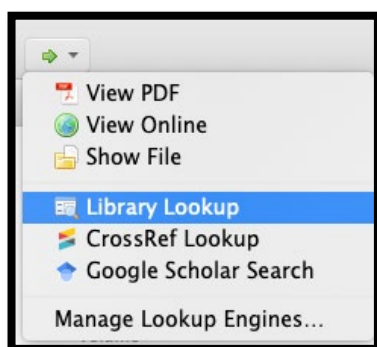
This will take you to UTS Library catalogue ad you will be able to access the full text of the resource (if UTS Library has a subscription to it).

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Setting up Zotero for the first use

Customising Zotero Display

There are very few display-customisation options in Zotero interface.

The only thing you can do is to add or remove columns by clicking: - this button is located on the top right-hand-side of the Zotero interface, and it will only appear once you have at least one reference in your Zotero Library.

How Zotero builds citation

In order to build a citation, Zotero's browser connector looks for key bibliographic information about the resource it is inspecting.

Zotero is not perfect!

Not all databases and websites work well with Zotero. Always double check the citations imported by Zotero don't have any mistakes in the title, author's names etc.

- In some cases, you will notice that Zotero has managed to capture *all* bibliographic data about a citation flawlessly, and you don't need to do anything.

- In other cases, you will notice that Zotero has imported *some* required data for an accurate citation, but not all. You will then have to **manually edit** the data to make sure the citation is displaying correctly.

- Sometimes the metadata has errors, this is particularly true with **AustLII**. Again, in cases like these, you will need to **manually edit** them yourself in Zotero.

- Occasionally, Zotero fails to bring *any* data in whatsoever. In cases like these, you will have to add the entire citation into Zotero Library manually. For example, UN Documents, Treaties, Yearbooks do not work well. Simply choose the closest resource type and add the citation in manually.

We will see a few examples of these shortly.

Inserting References into Zotero Library

Creating References Manually

Let's first look at how to create a reference manually in Zotero, because you might need to do that quite often in Zotero - particularly if you are using AGLC.

- Open Zotero

- Click on the New Item icon

- Select the type of resource. Note: some other items are hidden under **More**.

- Once you select a resource type, you will be given appropriate fields to fill out. You will need to fill out the **minimum information** that you need for your citation style.

Note:

- When entering manual citations, you only need to fill in the fields used in the citation and you can leave the rest blank.

Tips for Cases

- For a **reported case with round brackets**, use the *Reporter*, *Reporter Volume*, and *First Page* fields. The *Year* goes into the *Date Decided* field <u>without</u> brackets.

- For a **reported case with square brackets**, if the citation includes a volume number, add the *volume number* <u>before</u> *the reporter abbreviation* in the Reporter field (eg. **2 KB**); and leave the *Reporter Volume* field empty. The *Year* goes into the *Date Decided* field <u>without</u> brackets.

- For **medium neutral citations**, there are two ways of doing this:

    o the *judgment number* goes into the *Docket Number* field. Put the *year in square brackets* <u>before</u> the *Court abbreviation*, eg. **[2000] HCA** and leave the *Date Decided* field empty.

    o Put year in date decided field. The court abbreviation into the reported field, and the judgment number into the first page field.

Tips for Legislation

- For **Statutes**, the **Code field** is for the jurisdiction abbreviation: eg **Cth** (no brackets are required). Year goes into the "Date enacted" field.

- For **Bills**, enter the Bill title with the year and jurisdiction into the **Title** field. All other fields can be left empty.

Detecting References Automatically

Zotero's browser connector will try to detect references on a webpage. You can use the browser connector to add material to your Zotero library. Zotero desktop application must be open on your computer in order for this to work.

The appearance of the browser connector will change depending on what Zotero can detect on the page.

Z icon	When **no details** are detected, it will display the grey **'Z'** icon.
document icon	When a **web article/ web page** is detected, it will display a **blue 'document'** icon.
book icon	When a particular book is detected, it will display a book icon (for example in *Google Books*).
page icon	When a journal article is detected, a printed page will display.
folder icon	When **multiple items** are detected, it will display a **folder** icon (for example in *Google Scholar* search results): When saving from a page with multiple references, and check box will pop up asking you to select which references you want to save.

Note: If you **right-click** on any of the above icons, Zotero browser connector will give you the **Save to Zotero** option:
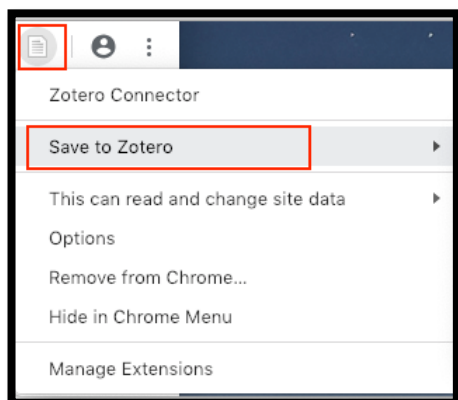
Importing References from a Webpage

To import references from a webpage to your Zotero library, click on the browser connector icon. By default, it will save the item into the collection folder you are currently in within Zotero, but you can choose another collection from a dropdown that will appear.
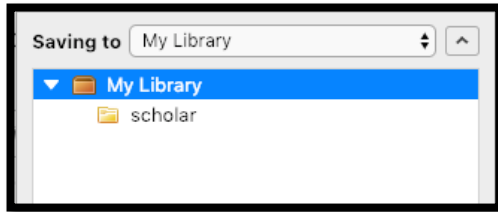
Where available, the full text of the article will also be saved in your library attached to the record.

Note:

Always double check the citations imported by Zotero! It will make mistakes.

Importing References from a Database

The basic rule of thumb for importing references from a database is:

- **Select** the records you want to import
- Select the **Export** option in your database
- Choose **Endnote/RefMan/RIS/Zotero** (depending on the database) as the export option
- Click **Export**

This method works well with GoogleScholar and HeinOnline.

Google Scholar

To download references directly from Google Scholar

- Click the **Cite** button which appears underneath the article
- Choose **RefMan**
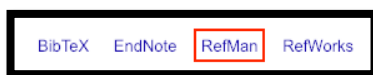
The reference will be added to your Zotero Library.

HeinOnline

If the full-text is available in HeinOnline, Zotero will recognise it as a **journal article**.

- **Right-click** on Zotero Connector in your browser
- Choose **Save to Zotero (HeinOnline)**

If the full-text is **not** available in HeinOnline, Zotero will recognise it as a **webpage.**

You will need to manually edit this entry in Zotero Library to turn it into a **Journal Article**.

AustLII

For the most part (but not always), Zotero recognises which database you are looking at within AustLII.

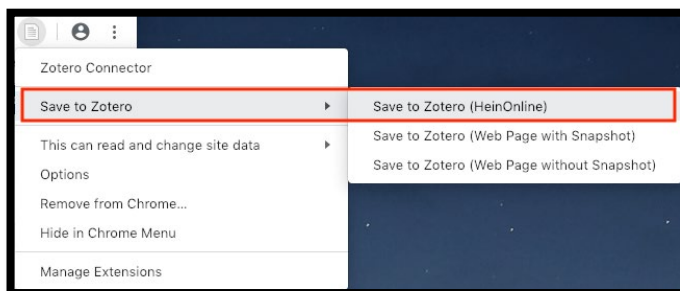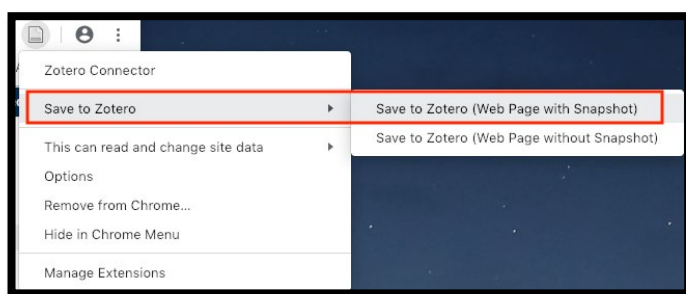The Browser Connector icon will change depending on the type of content being detected by Zotero:

Cases	⚖
Legislation	🏛
Journal Articles	📄

However, there are some issues with AustLII:

You will need to manually change the item type from Web Page to a Case, or a Bill or a Statute. These steps will ensure short titles for your references will work.

Legislation

1. Check the 'item type' is set to Statute.
2. Find the jurisdiction in the 'extra' field, then move the jurisdiction to the 'code' field.
3. Find the year in the Name of Act field, then move the year to 'date enacted'.

Reported cases

1. Check the 'item type' is set to Case.
2. Check the following fields are populated, if not move the correct information into these fields:
   o case name
   o date decided (use year only)
   o reporter (use abbreviated Law Report Series title)
   o reporter volume (year will automatically appear in round brackets when there is a volume number, square if this information is missing);
   o first page.
3. If you want square brackets and a volume number leave the 'reporter volume' field blanks and type the volume number in to the 'reporter' field before the reported abbreviation.

Medium neutral cases

1. Check the 'item type' is set to Case.
2. Check the following fields are populated, if not move the correct information into these fields:
   o case name
   o court (manually change this to the abbreviated version)
   o date decided (can be Year Month Day; Year Month; or Year – only the year will appear)
   o docket (contains the judgement number – this will automatically place the year in square brackets)
   o reporter (use abbreviated Law Report Series title)
   o reporter volume (year will automatically appear in round brackets when there is a volume number, square if this information is missing)
   o first page.

Issues with Lexis and Westlaw

Zotero is not automatically compatible with Lexis or Westlaw.

This means that when you are viewing an item like a case, or a statute on Lexis or Westlaw, Zotero will simply treat it as a 'Web Page'.
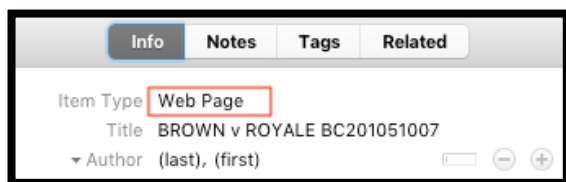
You will need to manually change the item type from Web Page to a Case, or a Bill or a Statute.

This problem happens with AustLII as we have seen earlier.

Workaround

In these situations, you can -

- Search for the same resource in HeinOnline, Google Scholar or another supported database and import the citation from there, or
- Enter the reference manually into Zotero (discussed earlier), or
- Try extracting citation data from the PDF and add/edit the missing or misplaced information (discussed next, but it doesn't always work)

Extracting citation data from PDF documents

If you have PDF documents saved on your computer, you can drag and drop the file into the center panel of Zotero.

The program will then try to detect the publication details from any metadata in the file, create a record and link the file to the record.

Note: Not every file will have the required metadata for Zotero to detect. Some files will work, others won't. Some files will give incomplete or incorrect data.


Always check and edit the bibliographic information that has been added from the PDF.

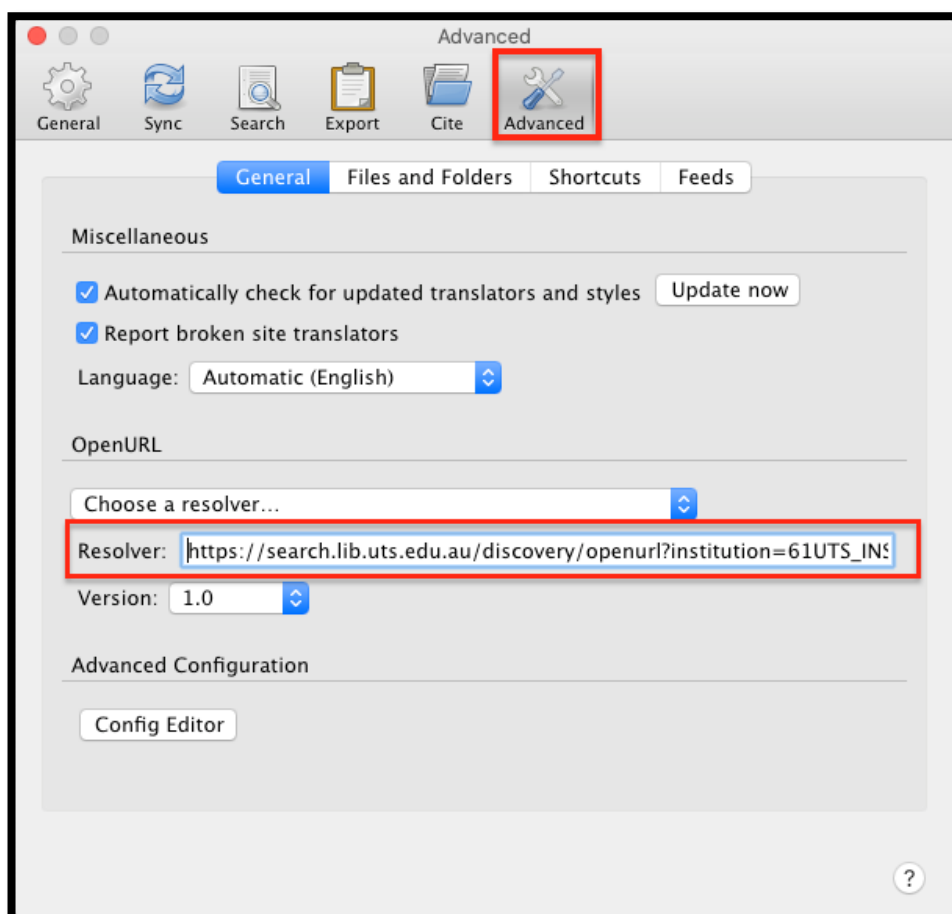 Library

Adding references by identifier

You can quickly add references to your Zotero library if you already know their ISBN or Digital Object Identifier (DOI)

To add a reference via one of these identifiers, click the **Add Item by Identifier** button at the top, type or paste in the identifier and press **Enter**
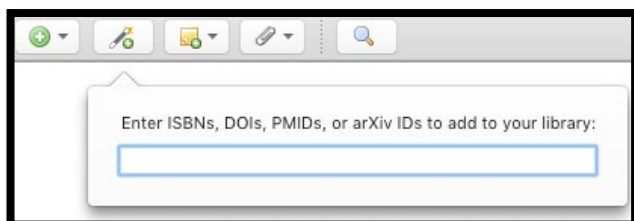

Adding full text articles to existing references

- Launch Zotero application
- From the top menu bar, click **Zotero** > **Preferences**
- Click **Advanced**
- Under **OpenURL Resolver** field enter**:**
  https://search.lib.uts.edu.au/discovery/openurl?institution=61UTS_INST&vid=61UTS_INST:61UTS&

- Now when you select an item in your Zotero Library, and then use the Library Lookup function within Zotero, it will search for the full text from UTS Library's collection.
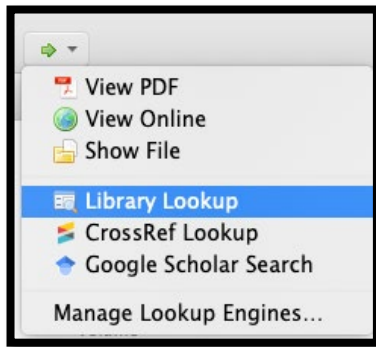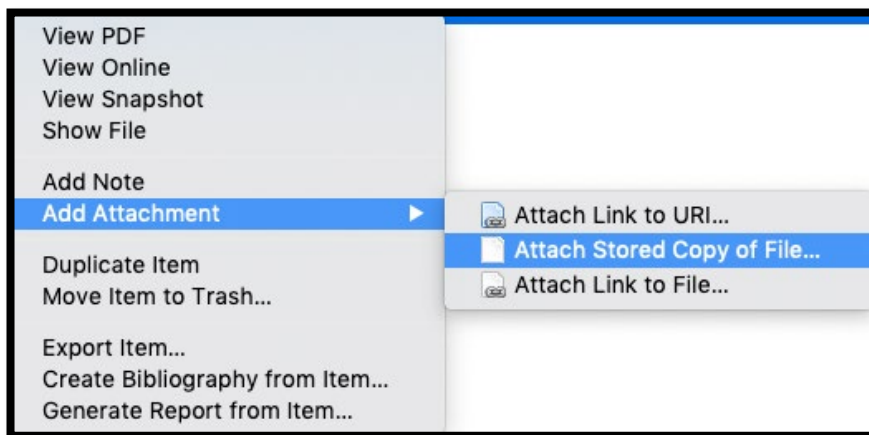
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This will take you to Library catalogue and you will be able to access the full text of the resource (if UTS Library has a subscription to it).

Manually adding attachments and links to attachments

To add attachments already stored elsewhere in the computer:

- **Right click** on an existing citation

- Click **Add Attachment** > **Attach Stored Copy of File**

Rather than attaching a copy of a stored file, you can also attach link to an **existing file** in the local hard drive, or a **link to URI** (for web location).

Creating collections and subcollections to organise your references

You can create **collections** and **subcollections** in Zotero to organise your materials.
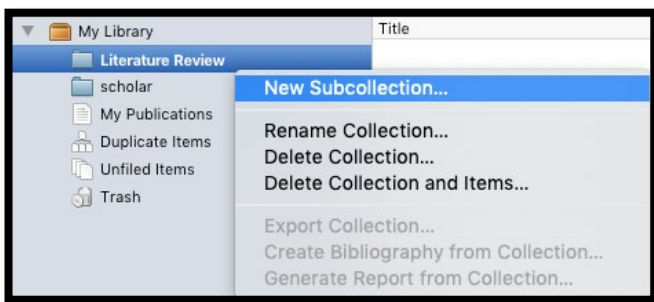
- To create a new collection, right-click within your Library panel and select **New collection.** Name the collection in the pop-up box.
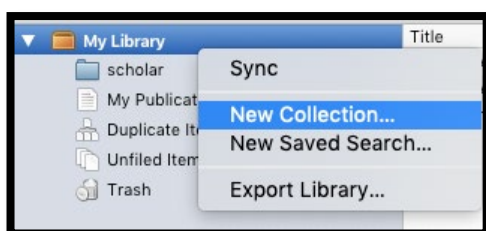
You can also create **subcollections within collections**, or sub folders.

- To add subcollection within an **existing collection**, right click on the folder and select **New Subcollection** and give it a name.

- **Add items** to collections and subcollections by **dragging** and **dropping** them into the folder.

You can remove items from folders by **right clicking** and selecting **Remove Item from Collection**. This will not delete the item from your library.

You can **rename** collections or subfolders at any time by right clicking on a folder and selecting **Rename Collection**.

Adding tags to classify references

Zotero tries to tag items when it brings references in, but not always.

You can always add custom tags to items in your library. Tags can be useful because they can help quickly retrieve related items. You can use tags for assigning **keywords**, or actions to carry out, for example '**to read'**.

To view, add and remove tags, **select an item** in your library and click on the **Tags tab**. (Items downloaded from a database or catalogue may come with tags already attached).
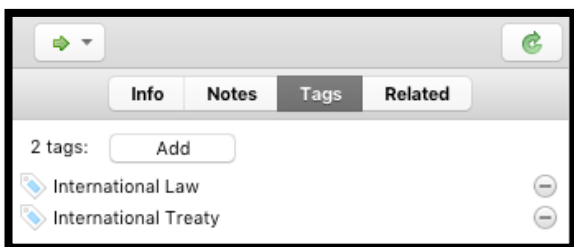
You can add your own tags or delete existing tags.

Display Items by Tags

Your tag cloud is displayed in the panel below your Collection folders at the **bottom left-hand-side** of the Zotero interface. This panel will only display the tags *within that collection*.
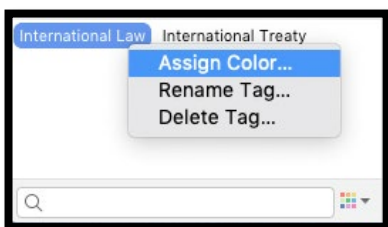

Clicking on a tag will display all items tagged with that term. You can choose more than one tag to show items with that combination of tags.

You can colour code your tags, this will add a coloured square to the item in the middle panel.

You can also search for tags using the search box.

Library

Adding Notes to items

The **Notes** field allows you to add personal notes for your records. Each item may have multiple separate notes.

To add a note, **select an item** and click the **Notes tab** on the right-hand panel. Click the **Add** button.
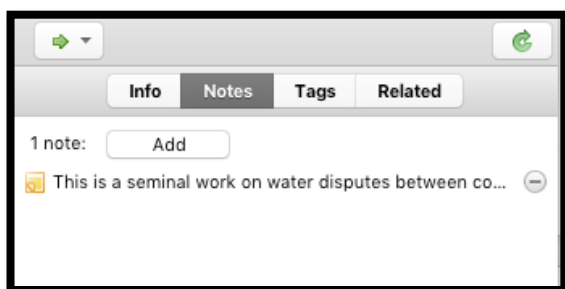
You can edit the note within this panel, or in a new window. Notes fields allow text formatting, highlighting and hyperlinking.

Search Zotero Library and its Collections

You can search your entire Zotero Library and its collections by clicking on the Search icon located at the top of the Zotero interface. You can also search for notes and tags you have added to your references.
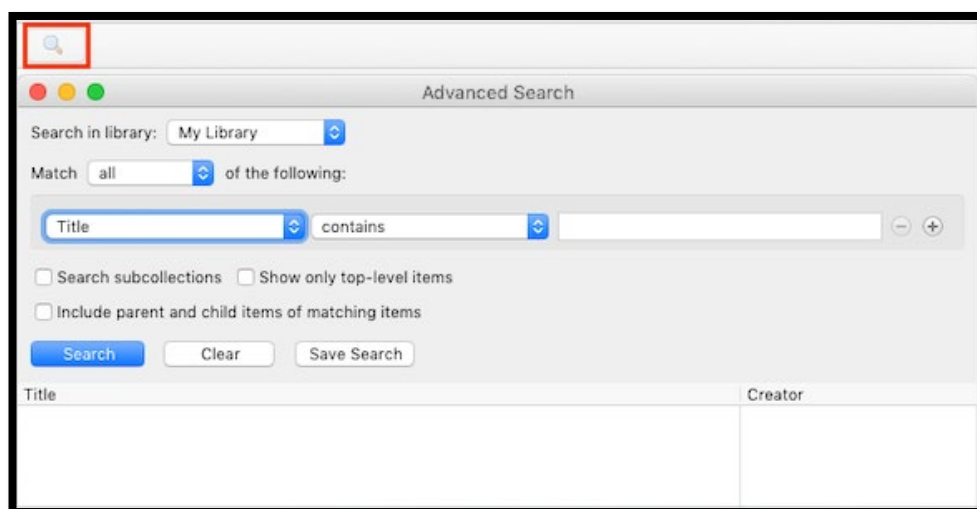
Inserting References from Zotero into Microsoft word using AGLC

The Zotero Plugin for Microsoft Word

When you installed the Zotero application, you have also installed the Zotero plugin for Microsoft Word. This plugin allows you to insert references directly from Zotero Library into your Microsoft Word document.
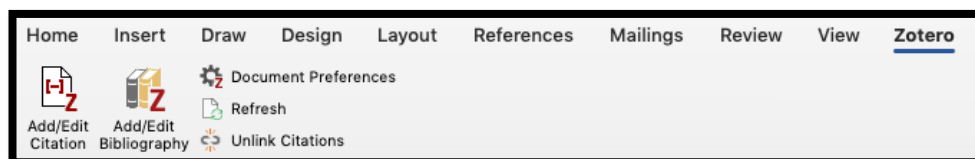
- **Add/Edit Citation** - Adds a new citation or edit an existing citation in your document at the cursor location.
- **Add/Edit Bibliography** - Inserts a bibliography at the cursor location or edits an existing bibliography.
- **Document Preferences** - Opens the Document Preferences window, e.g. to change the citation style.
- **Refresh** - Refreshes all citations and the bibliography, updates any item metadata that has changed in your Zotero library.

Unlink Citations - Removes Zotero field codes from the document. Removing field codes changes your references in to plain text and prevents any further automatic updates of the citations and bibliographies. **This is irreversible**.

Removing field codes should only be done when you are ready to finish and/or submit your thesis. You should save a back-up copy of your document in case you do need to make changes.
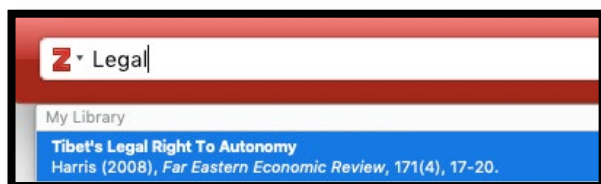
Don't click Unlink Citations unless you are absolutely sure what you are doing!

Adding Citations in Microsoft Word

- Open Microsoft Word
- Click on **Zotero tab**
- Click **Add/edit Citation**

Option 1: Quick View

Enter your terms (author, words from the title) in the search bar, the references that match will be displayed. Click to **select**.
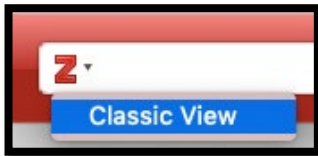

Adding Multiple Citations in Quick View

- To add multiple citations in Quick View, enter the first citation
- Enter the words from the next citation (ie: author name, words from the title)
- Repeat until you have added all required citations
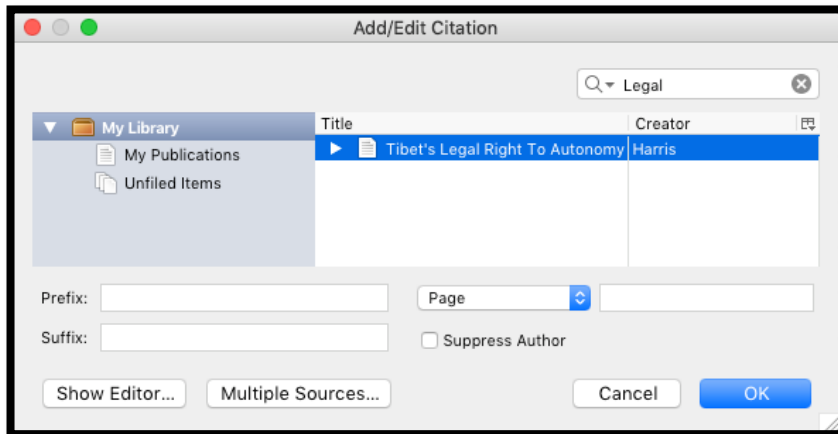- Hit **enter** to insert them into your document.

- Click on that little drop-down button next to Z.
- Switch to **Classic View**

The Classic View displays your entire library.

- Select the desired reference and click **OK** to insert it into your document.


Adding Multiple Citations in Classic View

o   To add multiple citations in Classic View, Click on **Multiple Sources**

o   Select the first source, then press the green arrow

o   Select the second source, then press the green arrow

o   Repeat until you have added all required citations

o   Press OK to insert them into your document.

Handy Tips

If you prefer **Classic View (**like we do!), you can train Zotero to use it as the default option when you trying to insert references into Word. To do that:

- From the top menu bar, click **Zotero** > **Preferences** (in PC **Edit** > **Preferences**)
- Click **Cite**
- Click **Word Processors**
- Tick that box next to **Use classic Add Citation dialog**

 Library
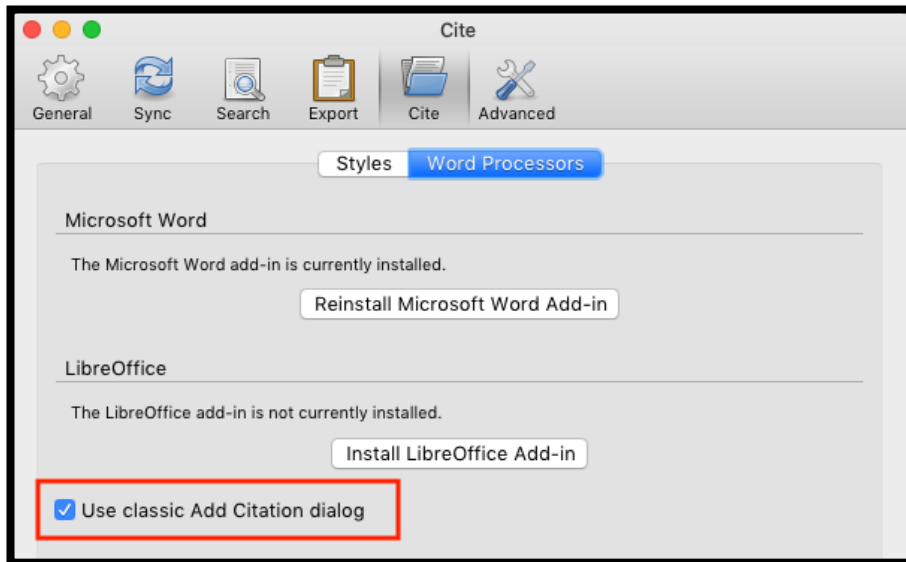
Previewing a Citation in AGLC Style

To preview a particular citation in AGLC style:

- Highlight the reference in Zotero
- From the top menu bar, click **Zotero** > **Preferences** (in PC **Edit** > **Preferences**)
- Click on **Cite** > **Styles**
- Click **Style Preview** (a new window will pop-up)
- Click **Refresh**

You can now preview the selected citation in AGLC style:

Editing a Citation you have entered already

- In Microsoft Word, click on **Add/Edit Citations**
- Choose **Classic View**
- Locate the citation you want to edit.
- Add page numbers, and other text, or remove the citation.
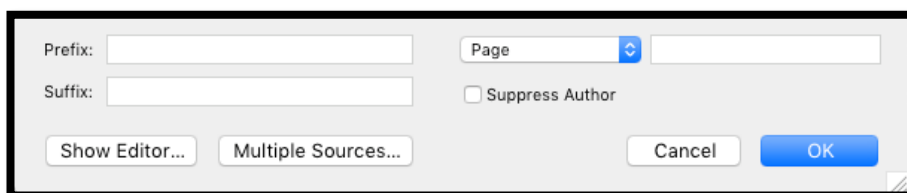
Adding a Bibliography

Once you have finished your work, you can generate a bibliography. To do that:

- In Microsoft Word, position your curser in the location where you want your bibliography to appear.
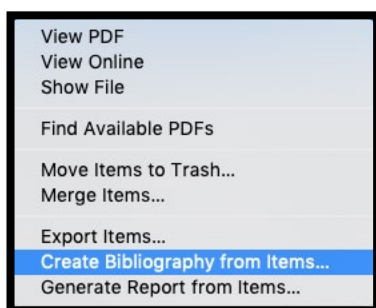- Click on **Add/Edit Bibliography**

Once you have added a Bibliography, you will need to copy/paste the references into the right categories according to the AGLC rules. **Zotero won't do that!**

The bibliography tool will show your citations in the correct AGLC order (splitting A Articles/B Cases/C Other etc in alphabetical order) but **it lacks headings**.

You must add the headings yourself manually. We recommend doing this after you have finished working on your document.

Quick bibliography

You can quickly generate a bibliography in word by highlighting a selection of items in your Zotero library and then, **right-click**, choose **Create Bibliography from Items…**

- Choose your **Citation Style**
- **Output Method: Copy to Clipboard**
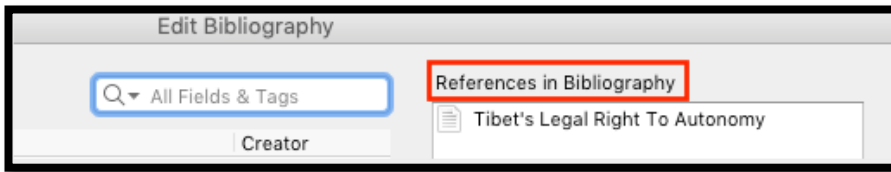- Click **OK**
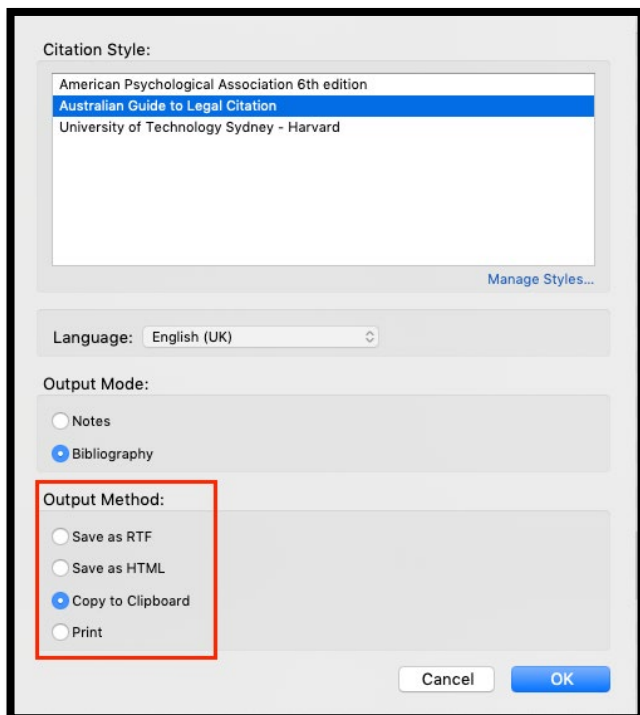
You will now be able to paste these references into a blank Word document and generate a quick bibliography.

Edit bibliography

- In Microsoft Word, click on **Add/Edit Bibliography**

All sources cited in your document will be listed.

To add additional sources to your bibliography,

Click anywhere within your bibliography, click the **Add/Edit Bibliography** button. Select the references to be added and click the green arrow ➡ to add more sources to the right-hand column. These will be added to your bibliography.

Syncing

Access and use the same Zotero Library from multiple computers using Zotero Syncing feature

- Go to: https://www.zotero.org/user/login/
- Log in using your Zotero credentials
- Click on **My Library.** You will now be able to see your entire Zotero library online.
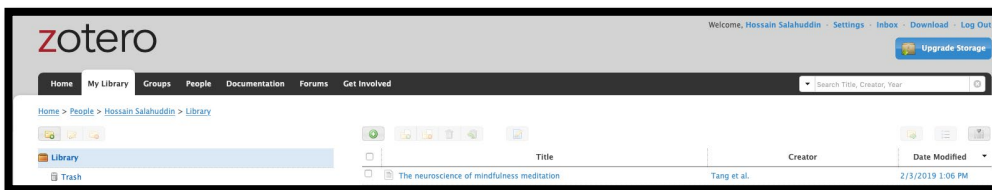
- You can click on a reference, see its detailed metadata, abstract and links to attachments.
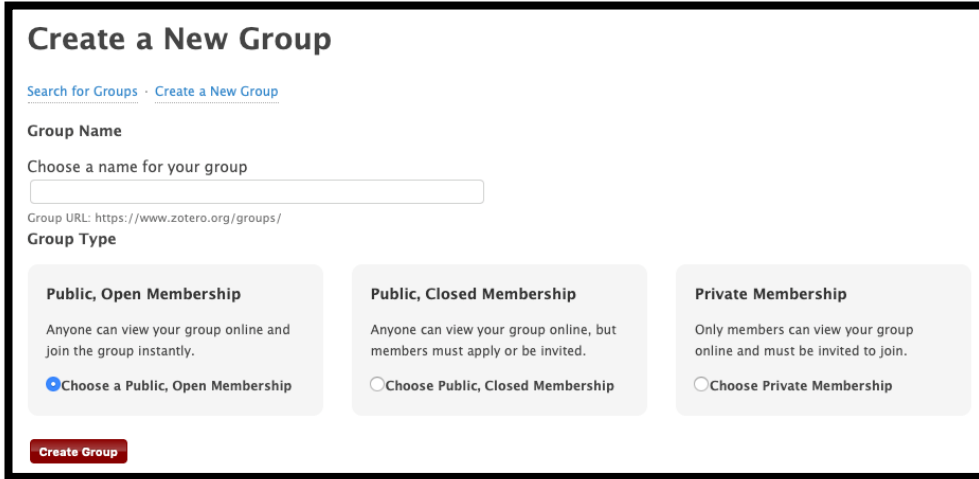- You can edit items and those changes will sync back to your local Zotero Library.

Creating and joining Zotero Groups

With Zotero groups, you can:

- Share your own work or sources you have discovered with others who are working in related areas.
- Collaborate with colleagues, publicly or privately, on ongoing research.
- Discover other people with similar interests and the sources they are citing.

Creating a new Zotero Group and inviting members

- To create a new group, go to the top menu bar of Zotero, then click **New Library** > **New Group**
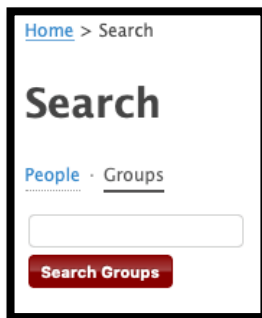

- Give your new group a **name** and choose the most appropriate option for **Group Type**.

You can then invite other existing Zotero users to your group.

Joining an existing Zotero group

- Go to https://www.zotero.org/search/type/group
- **Search** for groups using a **keyword**

- Find a group and **join**.
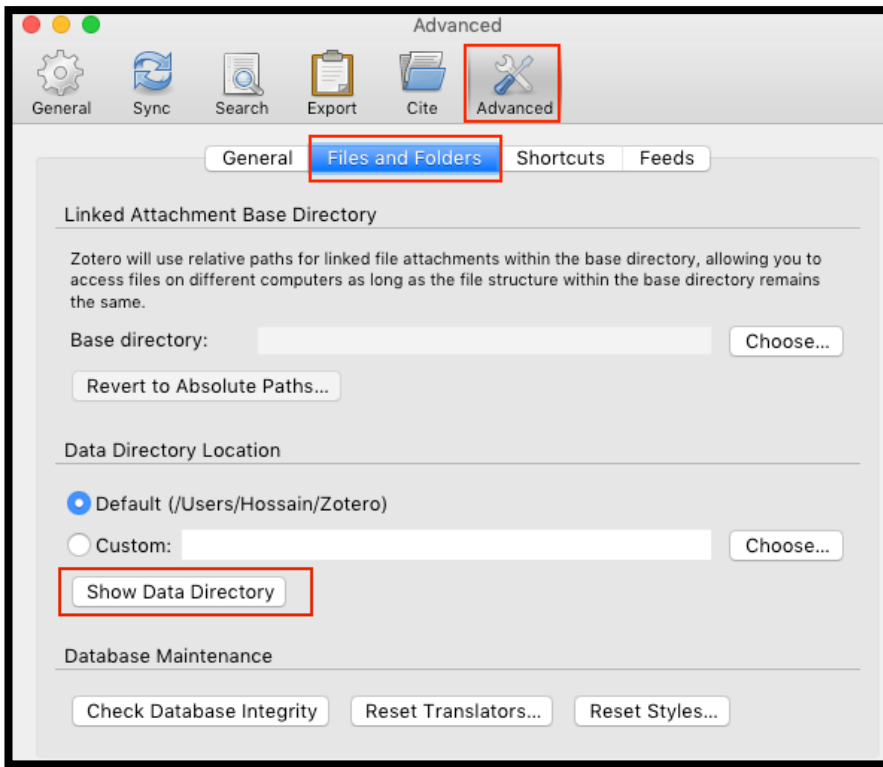
Back-up Zotero Library

 Syncing is **NOT** a good substitute for backing up: the Zotero servers only store **the most recent version** of your synced library! Imagine if you have accidentally deleted a bunch of references from your local library, those references will be deleted from your synced library as well!

This is why we strongly recommend that you frequently back up your Zotero library in an external storage device (eg. a USB Flash Drive).

To do that:

- Go to Zotero **Preferences**
- Click **Advanced**
- Click **Files and Folders**
- Click **Show Data Directory** (this is the folder you need to copy for your back-up, but don't copy it just yet!)

- **Quit** Zotero application
- Now **copy** that entire Zotero folder into a USB flash drive. Give it today's date. This is your backup.

 Please backup your Zotero Library on a regular basis!

Additional Resources

For further guidance, please see the following resources:

- o [Zotero Download Link](#)
- o [Zotero QuickStart Guide](#)
- o [Zotero for Law – Workshop Recording](#)
- o [The University of Melbourne – Introduction to Zotero](#)
- o [Harvard Library - Zotero Guide](#)

UTS Library