zotero

UNCTAD User Guide

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United Nations Conference on Trade and Development

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1. Introduction

Zotero is an open-source research tool that allows you to collect, organize, cite and share bibliographic references. Zotero, together with the new UNCTAD bibliographic style will help you to optimize the research, editorial and publication processes of all your research documents and United Nations reports.

This is a guide to use Zotero, from its installation (including Firefox and UNCTAD style) to the generation of bibliographies, citations and reports using Microsoft Word. For more information about Zotero, please visit: www.zotero.org.

2. Installation

For **office** computers, both Firefox and Zotero are installed automatically to your computer. You have to change the data dictionary location (section 2.1) before you start using Zotero.

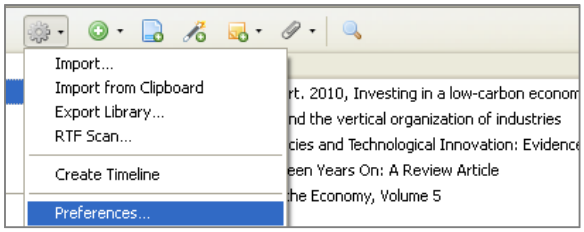
2.1. Configuration at Office and Setup Data Directory Location[1]

Zotero data directory location is where your data: notes, tags, file attachments, audio files etc. are stored. By default, this location is setup in the profile directory. To avoid filling up your network profile and better computer performance, we recommend you change the data directory location by doing this:

1- Start Zotero by pressing the icon

in the bottom right of Mozilla Firefox.

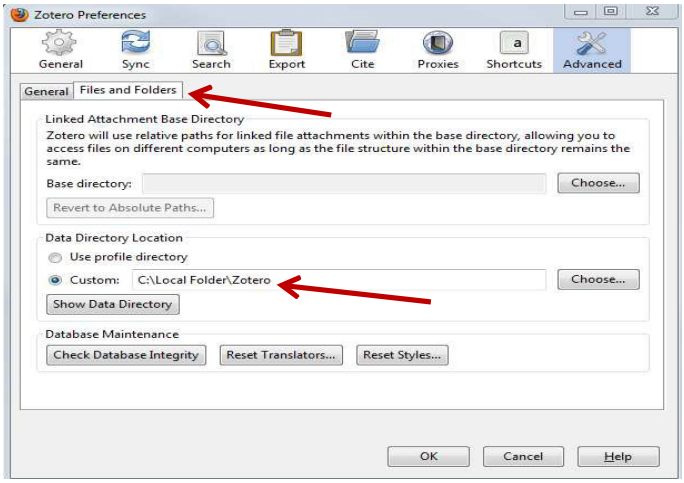
2- Click on the icon (middle column) and select "*Preferences*."



3- Click "Advanced"

4- Go to the "Files and Folders" tab.

[1] This section has been added by UNCTAD's IT Support Section.



5- In the Data Directory Location, select "Custom" and choose "C:\Local Folder\Zotero". Note: This folder will already have been created if installation was done automatically. Else, you need to create the folder.

6- Click "Ok" to close.

However, if Zotero is not installed in your computer or if you wish to install the system in your personal computer, please follow the steps in Section 2.2 to complete the installation.

2.2. Installation on personal computers

STEP 1: Firefox installation

Zotero is a Firefox extension. If Firefox is not installed in your computer please follow the next steps:

1. Create a new folder in your C drive named Mozilla Firefox, i.e C:\Mozilla Firefox.
2. Go to www.mozilla.org/en-US/firefox/new and click on "Firefox Free Download".

3. When installation asks you whether to run or to save the file, chose "**Run"**.
4. The Firefox Setup Wizard will guide you through the installation. Press "**Next**" till the end of the process.
5. When the wizard asks you where to install Firefox, choose the folder you just created.

STEP 2: Zotero installation

To install Zotero please follow these steps:

1. Open a session of **Firefox**
2. Go to www.zotero.org and press on the download button

3. Go to the section "*Downloads*" and chose the version "**Zotero for Firefox**".
4. You will get a warning. Click the "**allow**" button (it is safe!).

5. Click "**Install Now**".

6. When the installation is finished, you will get another warning. Press "**Restart now**".

7. Once installed you will see the icon "**ZOTERO**" or "**Z**" in the bottom right of the Firefox browser. You can open Zotero by clicking on it.

OR

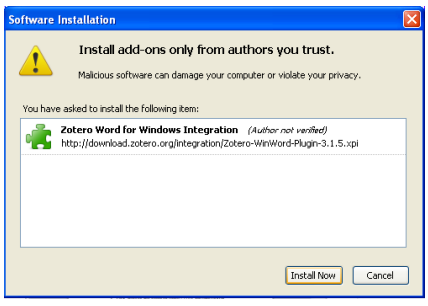
STEP 3: Microsoft Word plug-in installation

This will install the ICONS that you need to manage your Bibliography directly from Microsoft Word. Please follow the steps:

1. Close all Microsoft Word sessions
2. Go to www.zotero.org and press on the download red button
3. Go to the section "*Downloads->Word Processor Plugins for Zotero for Firefox*" and click on "*Zotero 2.1/3.0 word processor plugins*".
4. For **Windows users**:
   - Go to ¨*Microsoft Word->Windows*¨ section.
   - Click "*Word for Windows Plugin for Zotero 2.1/3.0*".

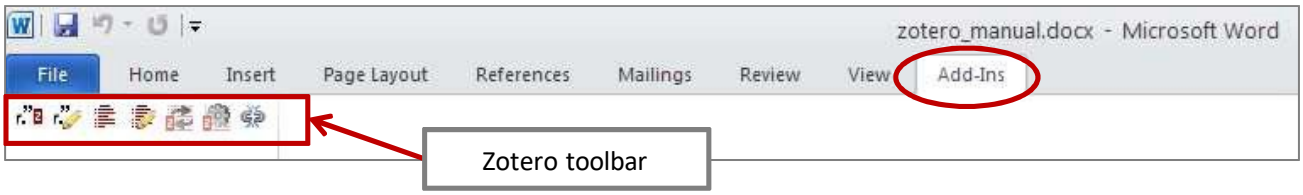
   For **Mac users**:
   - Go to ¨*Microsoft Word->Mac*¨ section.
   - Click on install "*PythonExt*"
   - Click "*Word for Mac Plugin for Zotero 2.1/3.0*" and then click OK.

Note that you will get the same warnings as for *Zotero Installation (step4-5).* As before, press "Allow", "Save Now" and "Restart Now".



Once installed you will have a Zotero toolbar in your Microsoft Word:

If you are using Microsoft Word 2007 version or above, you will find the Zotero toolbar in the **Add-Ins** tab:



* If you are a LibreOffice, OpenOffice or NeoOffice user, please follow the instructions you can find in: www.zotero.org/support/word_processor_plugin_installation_for_zotero_2.1

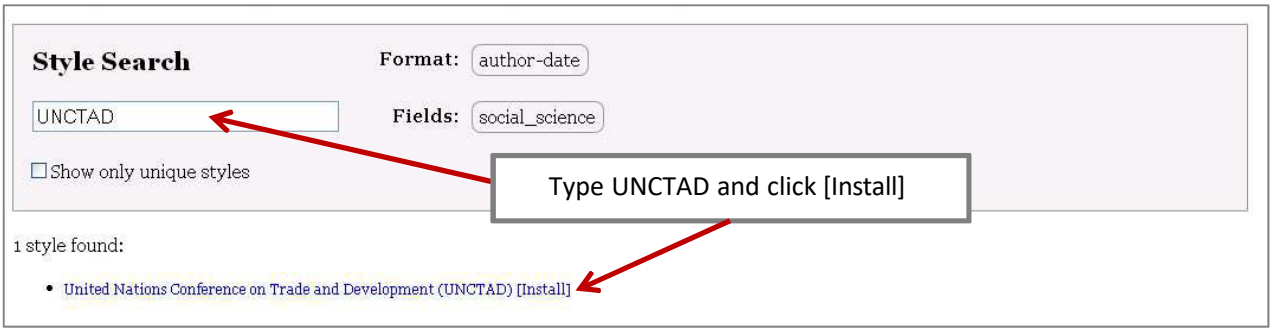
STEP 4: Create a Zotero account

Next step is to create your Zotero account (it is recommended to use your UN email address) in https://www.zotero.org/user/register . This account will allow you to share references among users.

STEP 5: UNCTAD bibliographic style installation

Finally, you need to install the UNCTAD bibliographic ("United Nations Conference on Trade and Development", is standard for UNCTAD publications and documents) style:

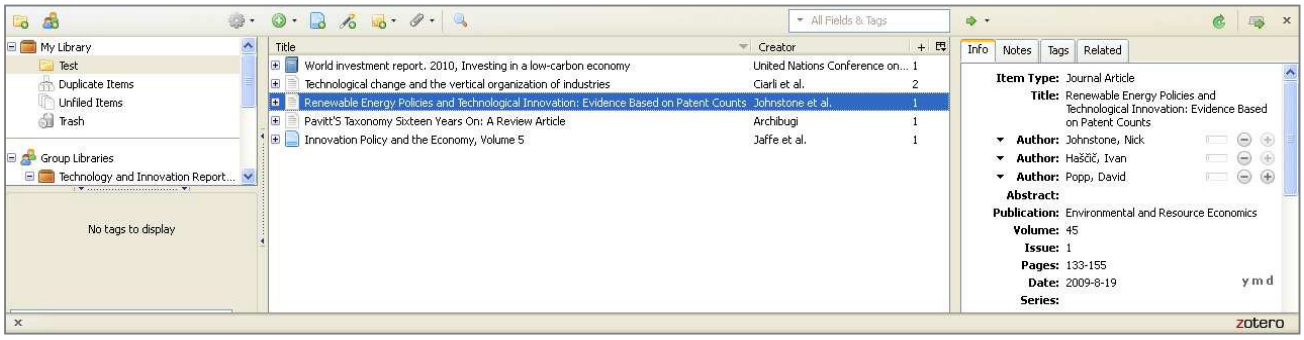
1. Go to the Zotero style repository: https://www.zotero.org/styles?q=unctad).
2. Type "UNCTAD" if it does not already appear in the "Style Search" box. The style "United Nations Conference on Trade and Development (UNCTAD)" will appear below the search box. Click [Install].
3. A confirmation box will appear. Press "Install" to finish the installation.



3. Setup your reference library with Zotero

3.1. Start working with Zotero

In order to start with Zotero press the icon zotero in the bottom right of the Mozilla Firefox. Zotero interface is composed by three columns: 1) **libraries and collections** (left); 2) **references** in the selected collection (middle); 3) detailed **information** of the selected reference (right).



Setup Data Directory Location

Zotero data directory location is where your data: notes, tags, file attachments, audio files e.t.c are stored. By default, this location is setup in the profile directory. To avoid filling up your network profile and better computer performance, we recommend you to change the data directory location. To do this:

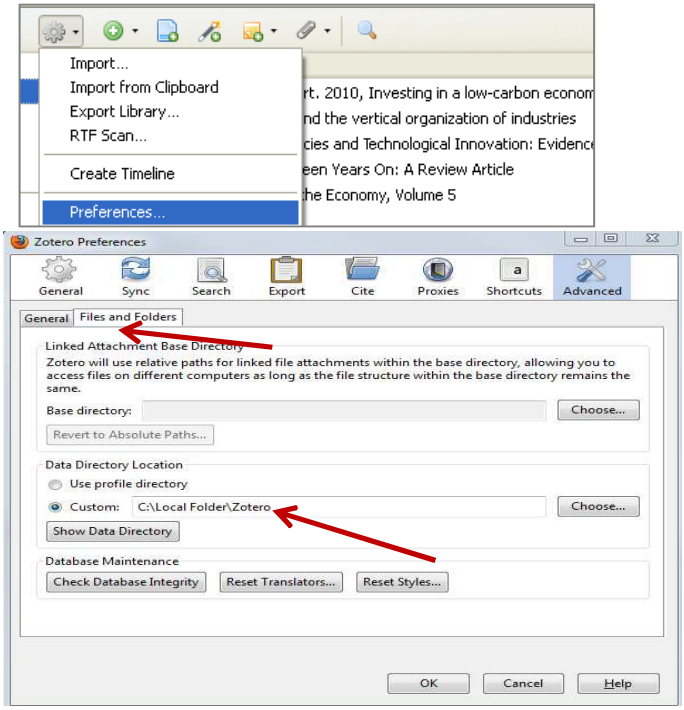
1- Start Zotero by pressing the icon

in the bottom right of the Mozilla Firefox.

2- Click on the icon (middle column) and select "*Preferences*."

3- Click "Advanced"

4- Go to the "Files and Folders" tab.



5- In the Data Directory Location, select "Custom" and choose "C:\Local Folder\Zotero". Note: This folder will already have been created if installation was done automatically. Else, you need to create the folder.

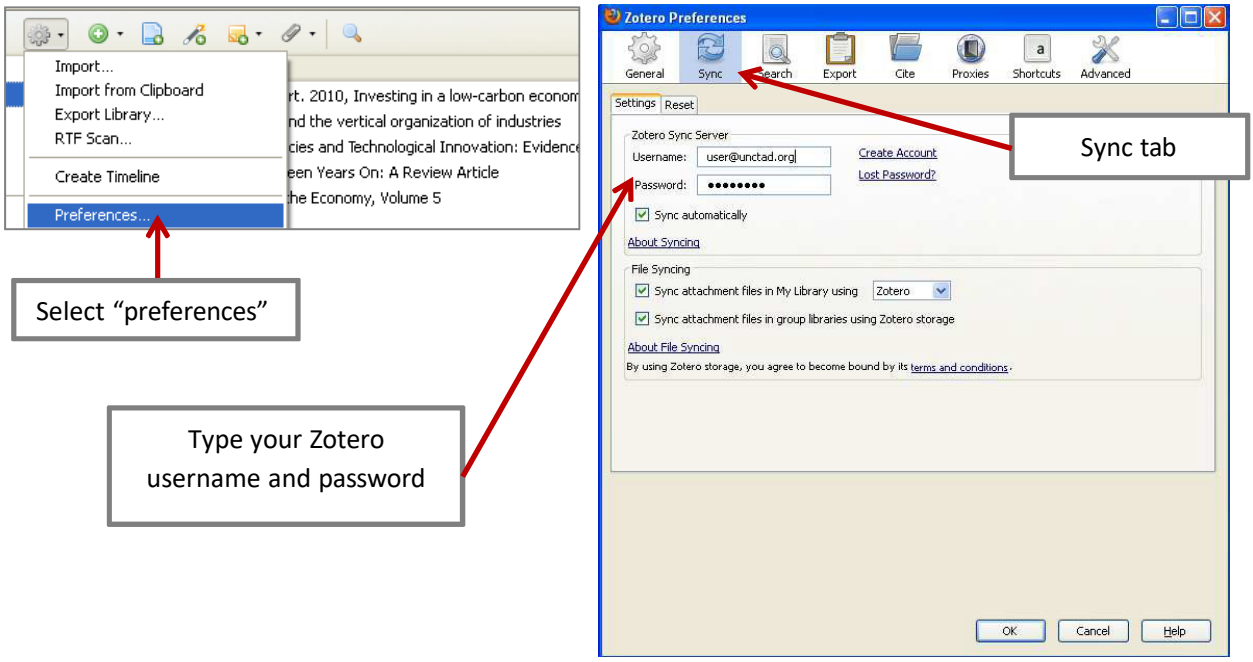
6- Click "Ok" to close.

Zotero Data Synchronization

Zotero synchronization function allows you to synchronize your libraries between your local computer and the Zotero server. It will also keep your shared libraries up to date, with the latest changes made by your colleagues. To synchronize Zotero follow these steps:

1- Click on the i n (middle column) and select "*Preferences*."

2- Go to the "Sync" tab, type your Zotero username and password and press OK.

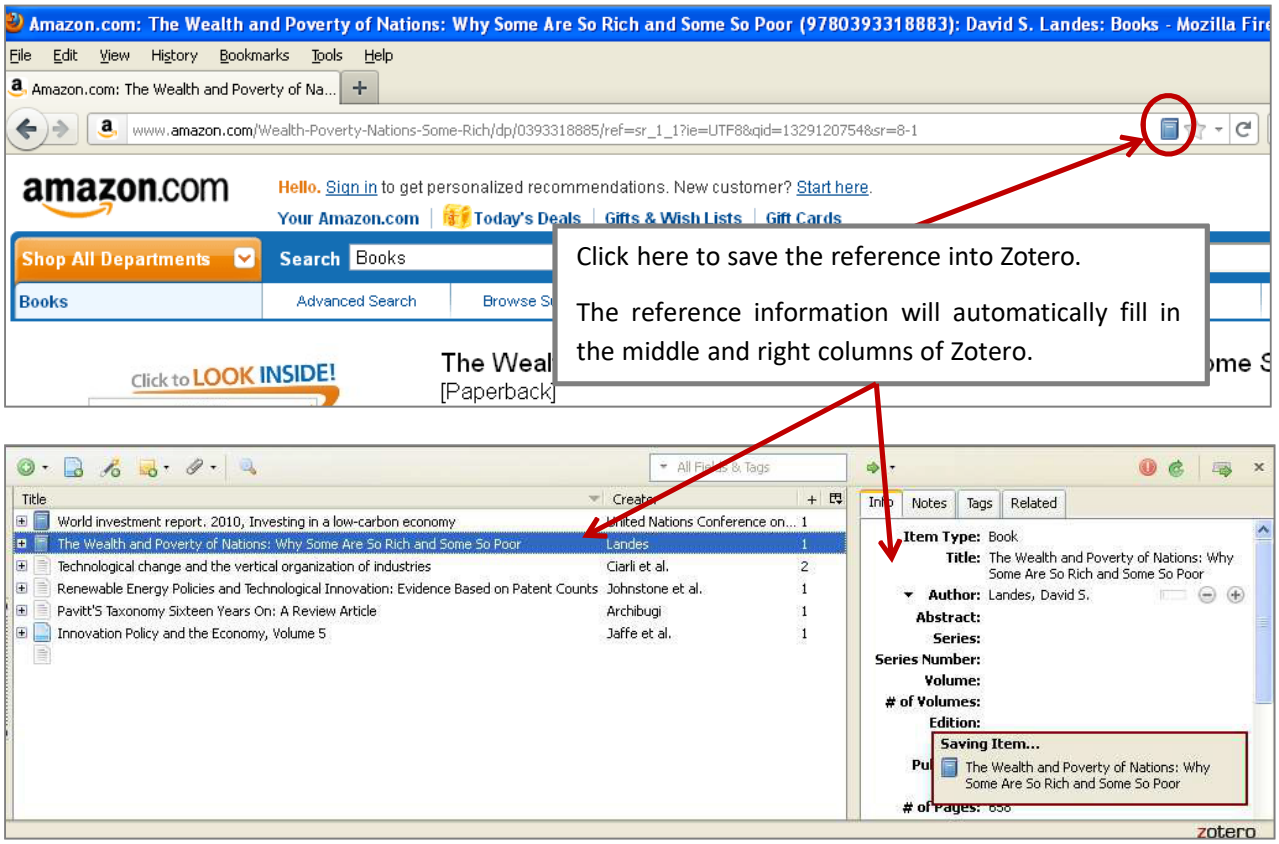


3.2. Import and Create library Items

There are several ways to add items to your library:

Method 1: Automatic capture of bibliographic information from the Web

When you are looking at the record for a book on an online library catalog, Zotero's book icon will appear in Firefox's location bar. Simply click on the book icon and Zotero will save all of the citation information about that book into your library. You will automatically see it in middle and right columns after the "click".



Other type of documents will have other icons. See below the most popular item types:

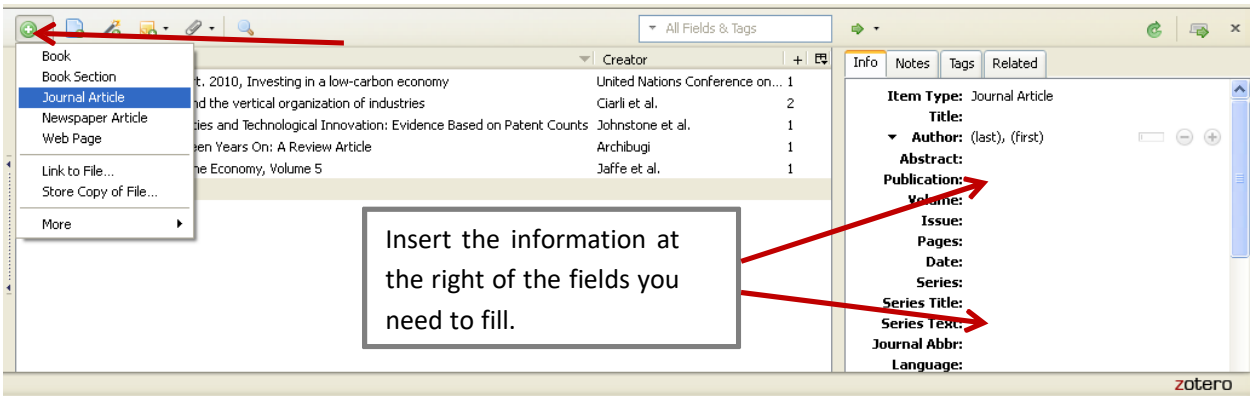
Book	Journal article	Report	Book Chapter
Newspaper article	Magazin article	Presentation	Webpage

If you want to archive the web page you are visiting as a reference, click the "*Create New Item from Current Page*" icon on the **middle column** of Zotero. This will create a web page item in your library with basic information from the page.

Method 2: Manual Entry

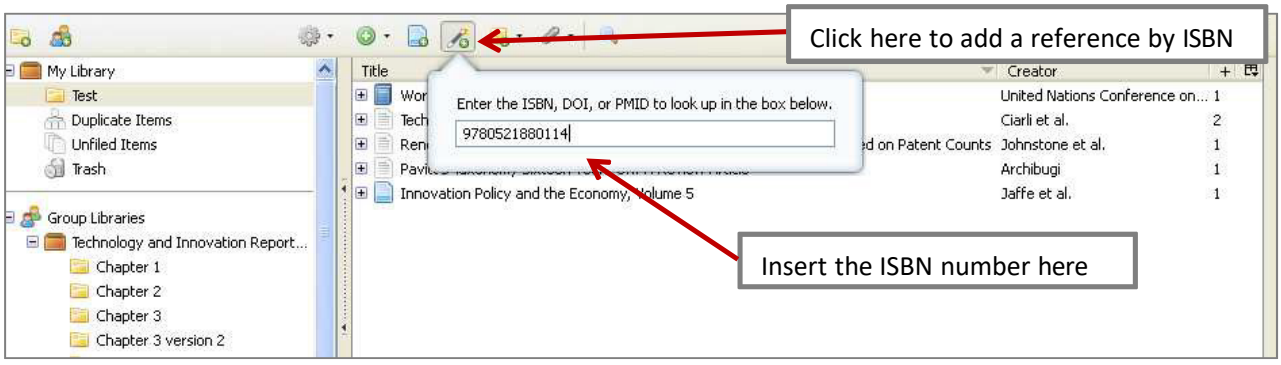
You can add a reference manually by clicking the icon (at the **middle column** on Zotero) and selecting the type of publication that you would like to add.

Click here to add a reference manually and chose the type of publication.



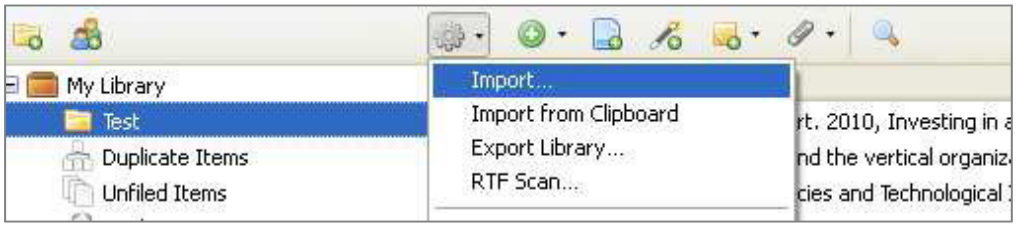
Method 3: Entry by ISBN

To add a reference using the ISBN click the icon , add the ISBN and press ENTER. The reference will automatically be added to your library



Method 4: Imports from other reference tools

To import collections from other reference tools into Zotero, click on the icon and select "Import." Then browse and select the file to be imported. Only files with the following formats will be accepted by zotero: Zotero RDF, MODS (Metadata Object Description Schema), BibTeX, RIS, Refer/BibIX, Unqualified Dublin Core RDF.

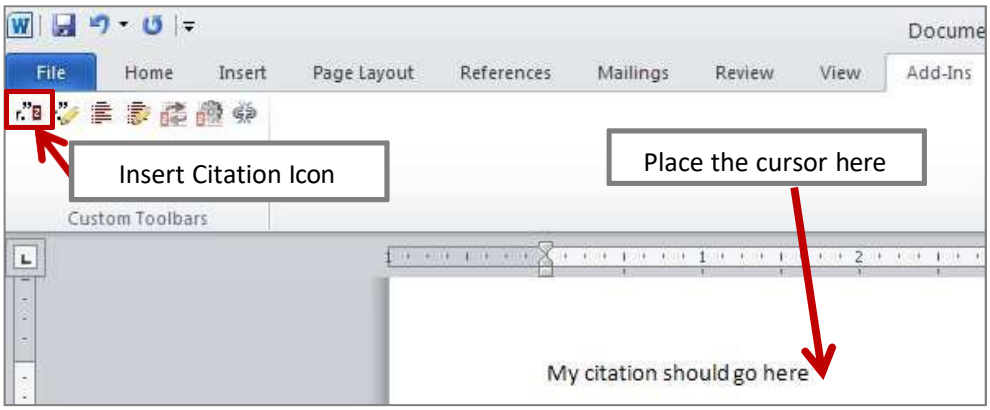


4. Use Zotero with Microsoft Word

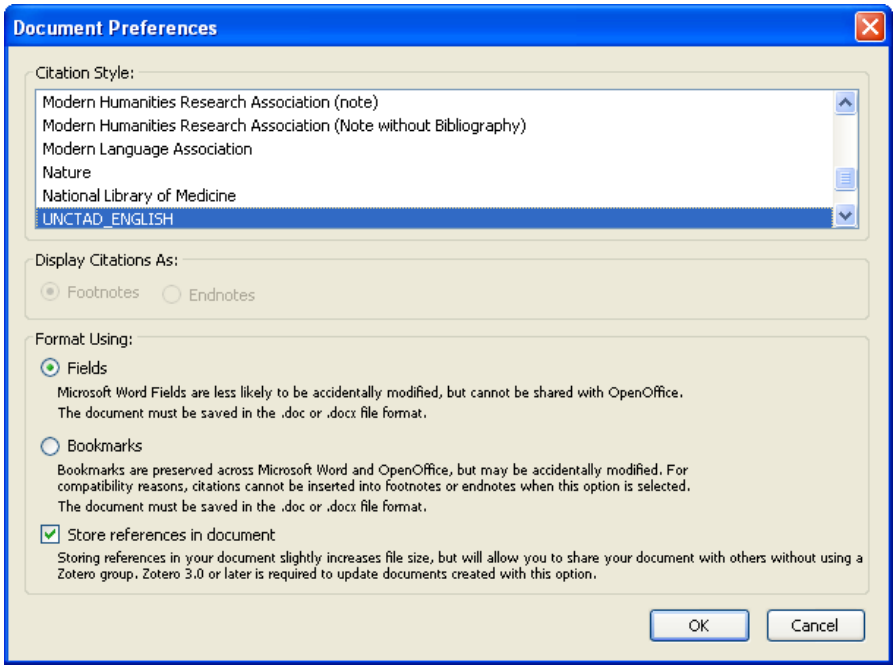
4.1. Add "UNCTAD style" citations.

To add a citation please follow the steps:

1- Place the cursor in the Microsoft word document, where you want to add the citation, and click on the Zotero Insert Citation Icon:

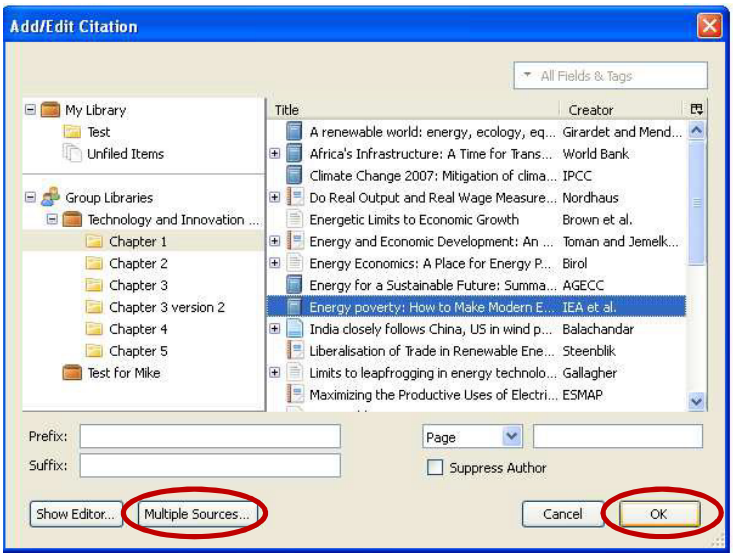


2- The first time you try to add a citation, Zotero will ask you which citation style you want to use. You need to choose "United Nations Conference on Trade and Development", this standard for UNCTAD publications and documents and press OK.



3- In some Microsoft Word versions you will see the Zotero "little view". If this happens, click on the Z and chose "Classic view" to see all your library items:

4- Browse and select the reference that you would like to add and press "OK":

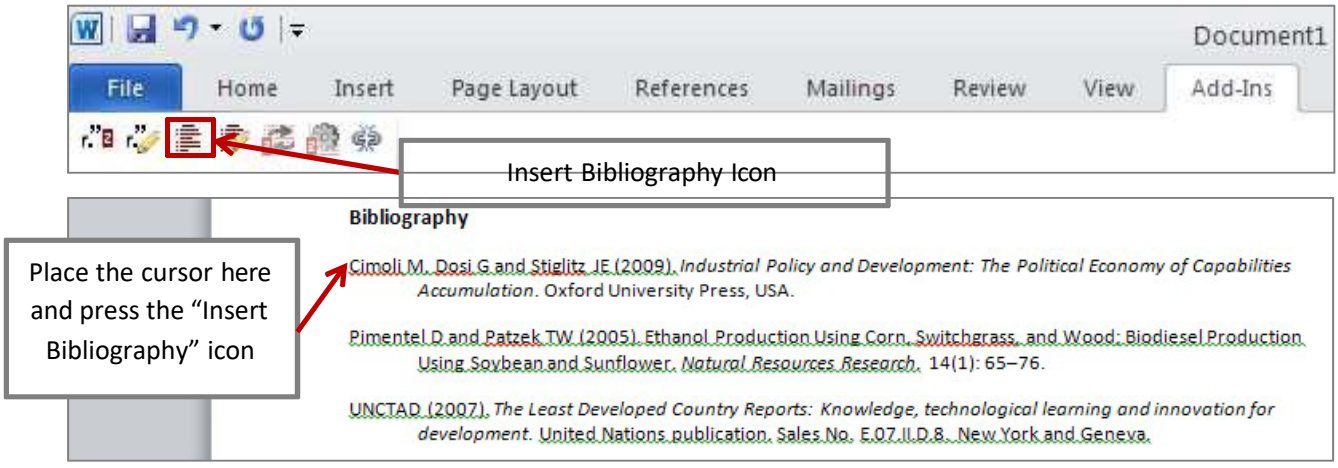


You can add multiple references at the same time clicking at the "Multiple sources" button.

Note: if you wish to change the bibliography style press the icon

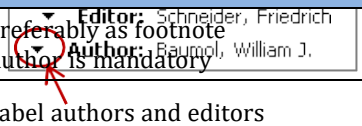
4.2. Add bibliography

To generate the bibliography from all the cited references place the cursor were your bibliography should go and click on the "Zotero Insert Bibliography" icon



ANNEXES

A. How to classify your bibliography for the UNCTAD TDR code in Zotero.

Type of Reference		Conditions [Zotero Variable]	Notes
	Blog post	[Item type]="**Blog post**"	Preferably as footnote Author is mandatory
	Book	[Item type]="**Book**"	Label authors and editors accordingly in Zotero:  Click on the arrow to change from Author to Editor
	Book Chapter or Section	[Item type]="**Book section**"	
	Journal article	[Item type]="**Journal article**"	
	Magazine article	[Item type]="**Magazine article**"	[Publication] = "**Name of the Magazine/Newspaper**"
	Newspaper article	[Item type]="**Newspaper article**"	
	Speech or presentation	[Item type]="**Presentation**"	If available insert the address into the [URL] variable.
	United Nations Publication	[Item type]="**Book**" or "**Report**" [Call number]=**Publication's sales number**	Sales number is mandatory
	Webpage	[Item type]="**Webpage**"	Preferably as footnote
	Report	[Item type]="**Report**"	
	Working paper	[Item type]="**Report**" [Series Title]=**Name of the series** [Report Number]= **Working paper number**	Examples of series: - NBER working paper series - UNCTAD Discussion Papers
	Any Other paper or document	[Item type]="**Document**"	Use [Extra] field to add additional information like "**Unpublished document**". If available, insert the address into the [URL] variable.

B. Available formats