Unit 4, Module 13, Video 2: Using the Zotero Plug-in with Microsoft Word™

In this Module’s first video, I introduced you to the basic features of the Zotero plug-in for Microsoft Word. But because you really get the maximum pay off from this tool if you use it for every single citation, I’m going to now show you how to tailor the in-line citation format to the most common variations you’ll want to use. These include just putting the publication year in parenthesis, citing multiple sources to substantiate the same point, and including a specific page number or range to fully cite a quotation or a very specific point.

These may seem like situations where it would be easier just to type things in. But the reason that’s a bad idea is this: if you always cite by including a field that’s inserted via the Zotero plug-in, then you can use some of its other features to generate a bibliography that is complete. I’ll demonstrate that but also show you how, for all of Zotero’s many virtues, the results you get are only as good as the meta-data you retrieve. So off we go!

Other in-line citation formats: 1. just the publication year

Recall that last time you watched me put in two in-line citations to the same source, and this was result: super-helpful Zotero formatted the second one just as it should, replacing the 2nd through 5th authors’ names with that fancy latinate et al. thing. But as you may have noticed in the articles you read, sometimes it just flows more smoothly if you mix it up a bit. One option is to put the author’s name (or names) in the text, and just put the publication year in parenthesis. To demonstrate this, I actually added one of this paper author’s sources to my Zotero library—a 2005 paper by Grave that was very frequently cited—and I’ll show you how this works.

Here’s a place where the author did that already. I’m going to replace the typed-in year-type citation with a true, Zotero-driven field. Like this. I find the paper.

Then I edit the citation by clicking the box, Suppress Author. And see the result?

Oh yeah. Get rid of the typed-in year thing.

Other in-line citation formats: 2. Page number for a quotation

You may have noticed how some authors will put in verbatim quotations. Now, as a matter of APA writing style, this is discouraged, a point made in Galvan and in the Purdue OWL. But if you think it’s necessary, here’s how you do it. To add a page number, type it in once you find the source in your library.

If you want to suppress the authors’ name, then you set that check box.

Other in-line citation formats: 3. Multiple sources for the same assertion
No doubt you've noticed the way that APA-format documents often have multiple sources that substantiate a single point. APA format stipulates that you put them in alphabetical order and then, when there are multiple sources by the same author, chronologically—again, guidance on this is available at the Purdue OWL.

Zotero makes this easy. Go in to add a citation. Then click the control, *Multiple Sources*. That brings up this handy dialog, and from here you just select the ones you want and move them into the right-most window. Like this.

And in they go.

There is an exception to this rule: you want to make it clear that one or more sources is more important. To signal that, you separate them with the phrase, “see also,” and you add that by putting it as a prefix to the first of the subordinate references. However, this will only work if you also un-check the option, *Keep Sources Sorted*. You'll really need to stay on your toes with this, however, and make sure that you've got things entered in the right order.

**Formatting your list of references**

As I mentioned at the start of the first video for this module, one of the great things about the careful use of Zotero is that you don’t have to fret about the completeness and accuracy of your list of references. I’m going to show you two ways to do this. The first is one I don’t suggest for making a true reference section. But it is a handy trick if you just need a document listing a set of sources. Here’s what you do.

Select the references you want to list. I’m actually going to do this by also leveraging a tag. I tagged several articles that were on the same topic: EMDR, which is a therapy technique. I search for the tag. Up they all come.

Right-click. Choose *Create Bibliography from Items….* You may be prompted to set the style – APA, of course. Then leave the output method, *Copy to Clipboard*, and click **OK**.

Go to your source document. Paste. There you have it.

But for your paper, if you have been good about always inserting fields for citations, then creating your reference list is super easy. I’m going back to the *APA*TemplateDemo* that we’ve used earlier, because I put in a bunch of references to demonstrate this point. Now that you understand how the show-code thing works, you can see them, right?

I’m scrolling to the end and the references are there, as codes. Now, you can select the Zotero command, *Refresh*, but I am mildly anxious about such things, so instead, I re-create it every time I want to make sure it’s all good. Like this.
Delete what’s there. Put my blinking insertion-point cursor just under the header, References. Go to the Zotero menu, select Add Bibliography. And it does. How great?

**Metadata**

Finally, I return to the issue of metadata, or data about data. In the prior video I introduced this concept. It’s important for a Zotero user because there's an ugly fact of life. Sometimes, a source's metadata will be screwed up. I'll show you some examples and some fixes.

**Bad case**

The problem I encounter most often is that some metadata will be in the wrong case, usually all of it capitalized. Here's an example that I messed up on purpose.

The result's not great either with the in-line citation.

Or in the list of references. So the best way to deal with this is to just pay attention as you import your sources. Spend the extra ten seconds to look over the metadata. For authors, you'll have to fix it by hand. But for other elements, you can right click and get an option to change the case. Here, I’m going from all caps to title case. And notice how I was able to use the Refresh command to update the in-line citation. And the list of references