

How-to Guide for Zotero Reference Management Software

Overview: *Zotero is a free reference management program that enables you to store and organize metadata and documents for references including books, journal articles, websites and other resources. You can use your Zotero library to create in-text citations and bibliographies in MS Word. The following is a [how-to guide](#) to get you started in Zotero. In addition, the following link will lead you to a series of videos with user-friendly Zotero tutorials: [Zotero Tutorial Videos](#)*

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Getting Started with Zotero:

1. Download Zotero at <https://www.Zotero.org/download/>
 - a) You have two options for downloading Zotero for your desktop: Zotero for Firefox or Zotero Standalone. You can choose to install either desktop version or both.
 - i. If you choose to install Zotero Standalone, download the browser extensions for either Chrome, Firefox or Safari, depending on which browser you use most commonly. A plugin for Word is automatically installed with this version.
 - ii. If you use Mozilla Firefox frequently, you may choose to install Zotero for Firefox, which allows you to save and organize documents without leaving Firefox. *Make sure to install the plugin for Word if you choose this version.*
2. You will also want to register online and create a user account, which can be done by clicking **Register** in the top right corner of the Zotero download page. This online account will allow you to back up your library to the cloud, access your library from multiple computers and network and share references with other Zotero users.
3. To ensure syncing between your online account and desktop Zotero library, you must add user account info to Zotero Standalone by going to **Tools > options > Sync** and then entering your account info (make sure **sync automatically** is checked). In Zotero for Firefox, hit the  **gear button**, then go to **preferences > sync** and enter your account info/make sure **sync automatically** is selected.


Importing references into your library from the internet:

1. Using your Zotero extension in your browser, you can save bibliographic information from online library catalogs or google scholar into your Zotero Library.

Zotero is able to use a web translator to determine what type of resource you are looking at. For example, if you were looking at the bibliographic information for a book in an online university library page, Zotero would recognize this and a book icon would appear at the top of your browser:



In **Firefox and Chrome**, this icon will appear *in the top right* of your browser; in **Safari**, it will appear *in the top left* of your browser. The icon that appears will vary depending on the type of resource, but should say **save to Zotero** when you hover over it with the mouse arrow. To add an item to your Zotero library, simply click on this icon.

If you are on a webpage with multiple records, a **folder icon**  will appear instead. Clicking the folder icon allows you to choose which records to download.

If you locate a PDF online that you want to add to your library:

Locate the resource while in your browser and hit the *save to Zotero* icon. You can also save a PDF to your desktop and then drag it directly into your library. Make sure [PDF indexing](#) is turned on; you can then **retrieve the associated metadata** (see below) for the PDF.

Retrieving Metadata for a reference in your library:

1. When you pull a PDF or document into Zotero, if it does not automatically import all the associated metadata for that reference, you may want to use this option. If you go to the reference in your library and right click on it, there will be an option to **Retrieve Metadata**. If you click on this, Zotero will scan the document to try to find the associated metadata.

*Note, this may not work for older documents that are not able to be indexed/searchable. In that case you may have to **manually enter** metadata for that reference into your library (see below).

Manually entering references into your library:

If you are unable to retrieve the metadata for a document or find it in a library catalog, you can always manually enter it. To do so:

1. Click on the green plus button, and select a reference type.




2. Enter metadata including title, author, publisher, date, etc.
3. Use **Tags**, **Notes** and **Related** Tabs to [organize](#) the reference further (see below).
4. Click on the paperclip icon to attach a file or link to the reference.



Setting up PDF Indexing:

Full-text PDF indexing allows PDF text to be searched with quick search (“Everything” option) and advanced search.

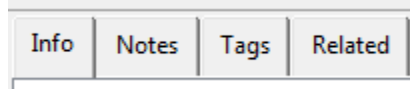
1. Set up PDF indexing by going to **Tools > options > search > Check for update (or installer)** and hitting **Install** in Zotero standalone or  **> preferences > search > Check for update (or installer)** and hitting **Install** in Zotero for Firefox.

Organizing references in Zotero:

- There are multiple ways to organize your Zotero library:

- **Collections and Subcollections:** On your Zotero desktop, you can create collections within your library to better organize your references.
 1. To do this, in the left pane of your desktop Zotero, *right click on My Library* and select **New Collection**. Enter a name for your collection. You can then drag and add items from your library on top of the collection name and it will add them to that collection.

*Note all references will remain in My Library, as well as the collection you move them to.
 2. You can also right click on collection headings and create **New Subcollections** to organize your references further
- **Tags/Notes:** You can add annotation and tags (or keywords) to each reference in your library to better organize items.
 1. When you have an individual reference selected in your library, the metadata for that item appears on the right-hand side of the library. Within the metadata pane, there are four tabs:



If you click on the **Notes** tab, you can add annotation to individual references.

2. If you click on the **Tags** tab, you can add keywords that describe the reference to the metadata. These tags will then appear in the lower left-hand portion of the screen as you add them. You can tag multiple references with the same keyword.
 - To filter your data using the tags, click on a tag name in the lower left portion of the screen. This will filter your references down to only those which were tagged with that particular keyword. You can select multiple tags at once.
 - To back out of filtering your references using tags, click on the tags you have already selected and it will bring you back to the full list of references.
3. You can also use the **Related** tab to create a list of other items in the library that are related to that particular item.

[Creating a group to share references with others:](#)

1. Log into **Zotero.org**, then go to the **groups** tab and click **create a new group**
2. Choose a name for the group and select the type of group as *Private* or *Public*. Options include:


- *Public Open membership*: Can be searched by Google and the Zotero site. Any Zotero user can join this group.
- *Public Closed membership*: Membership must be approved by the group administrator.
- *Private*: Invited members can view the group page.

Select one of these options and hit **create group**.

3. Decide whether you will give members the right to add, edit and delete items in the group library.
4. Your groups will then appear in your desktop Zotero, and you can add items to the shared libraries within them.

Backing-up your Zotero library:

It is good to back up your library regularly, as there are things that can go wrong with cloud based storage or your desktop library.

1. If you are in Zotero standalone, go to the **Tools** Menu and click on **Options** and then **Advanced**. If you are in Zotero for Firefox, click on the  button, then **Preferences** and then **Advanced**.
2. Click on the **Files and Folders** tab and then **Show Data Directory**. This will take you to the location where all the files for your Zotero library are stored.
3. Select all of the folders in this location; right click on them and hit copy. Then close Zotero desktop.
4. Select a location for the backup files to be stored on your computer or on an external drive and **create a new folder**. Label it with Zotero Backup and the current date.
5. Open the folder you created and paste all of the folders from for your Zotero library in the newly created Zotero Backup folder.
6. Your Zotero library is now backed-up. If you ever need to use the backed-up version, go into the backup folder, select and copy all folders and paste them into the location accessed via **Preferences > Advanced > Files and Folders > Show Data Directory**.

Purchasing more file storage:

1. Each Zotero user gets a **300 MB free** file storage. Additional storage can be purchased from Zotero's website. Information on the cost of storage plans can be found at: <https://www.zotero.org/support/storage>
2. To purchase additional storage, go to Zotero.org and log-in. Click on **settings** in the upper right-hand corner and then on the **storage** tab. On this page, you are able to select and purchase additional storage plans.

Citing Zotero References in MS Word:

*Make sure you have installed the Word Plugin from Zotero.org (see [getting started with Zotero](#)) before you try this.

1. Put cursor where you want the citation to go in MS Word

2. Go to the **Zotero** menu in MS Word (this will either say “Zotero” or be a picture of a scroll depending on your version of MS word) and hit **add citation**
 - a. You can also add Zotero to your toolbar if it is not already there by going to **view > toolbars > Zotero bibliographic management**
3. Choose the citation style you want to use and click ok
4. Search for the author name or title of the citation you want to add, and click on it to select it. Then hit **enter**

Creating a bibliography in MS Word:

1. Click where you want the bibliography to go in your word document and go to the **Zotero** Menu; hit **Insert Bibliography**. This will create a bibliography using the references already cited in the text of your document.