

Zotero is one of several free (or mostly free) citation managers. Others include Mendeley and EndNote. All work in the same basic ways.

You can use Zotero to share and manage papers and easily organize and keep track of citations.

The features below are available on both Zotero Standalone and Zotero for Firefox. Screenshots and instructions are for Zotero Standalone, but the web version is very similar.

INSTALLATION

Go to www.zotero.org and click "Download Now." This will bring you to a page where you can opt to download Zotero for Firefox or Zotero Standalone.

Choose Zotero Standalone if you prefer Safari or Chrome to Firefox or if you want to run Zotero as its own program instead of in the browser. Zotero Standalone syncs with the Web version.

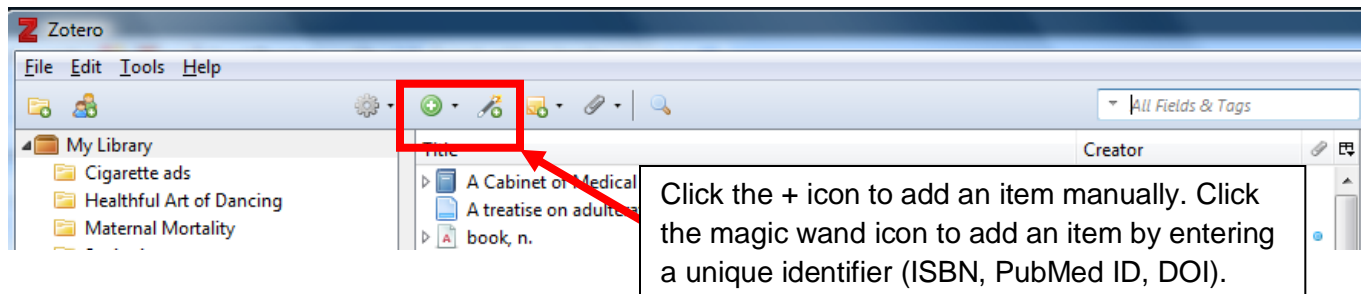
If you choose Zotero Standalone, it automatically comes with a Word plug-in. If you install Zotero for Firefox, you will have to add the plug-in.

If you're using Standalone, you'll see a Zotero icon on your desktop. Open it to run Zotero. If you're using Zotero for Firefox, in the bottom right corner of your Firefox window you'll see a Zotero button (you may have to select Tools→Toolbars→Add-on bar to view). Click it to view or hide your saved citations. Zotero continues to run when Firefox is open, whether or not you are viewing your library. Other than this difference, both versions work the same way.

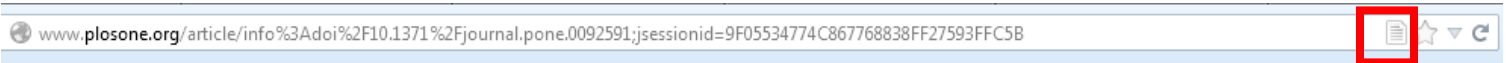
IMPORTING REFERENCES

Zotero offers a number of ways to add references to your library:

- You can add references **manually**.



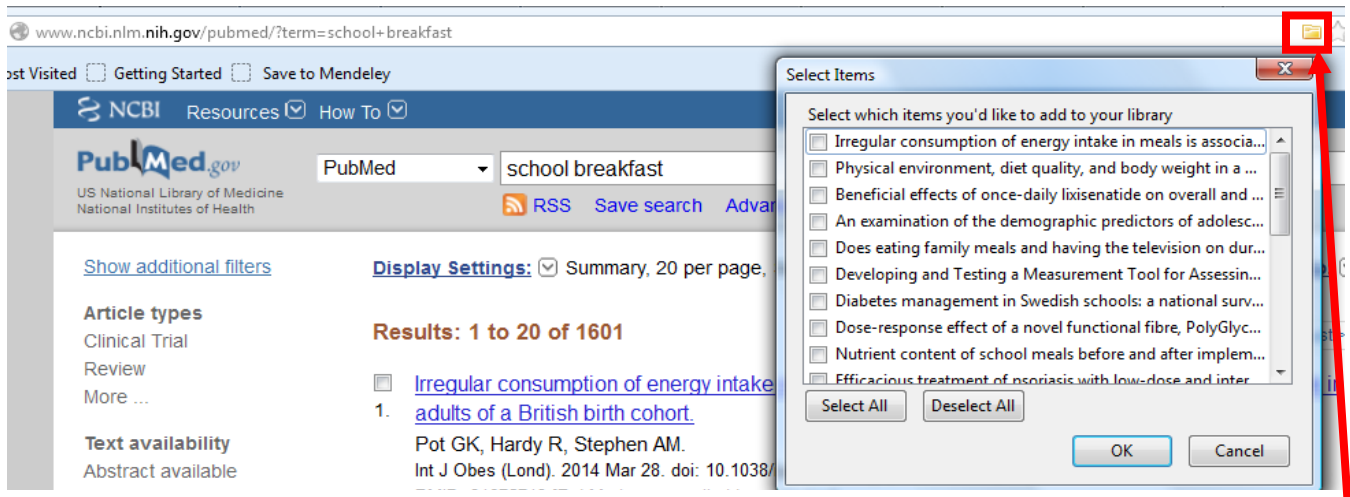
- You can **drag and drop** a PDF from your desktop or other file into your library. Then right click the item and select “Retrieve metadata for PDF.”
- You can **import from your browser** (using the browser in which you installed Zotero). Click the icon that appears to the right of the URL address bar in Firefox or Chrome. This should also import associated PDFs. If no icon appears, click the Zotero icon at the bottom of the browser, then the “Create new item from current page” icon. This will also save a copy of the page.



The Zotero icon at the bottom right of the browser.

The Zotero importer icon for articles. The icon appearance will change based on item type.

- You can **import libraries** from other citation management softwares. First, export the bibliographic data from the other program. Then click Zotero’s gear icon (⚙️) and select “Import...” Browse to your file, select it, and click the “Open” button. This should import the exported items into your Zotero library in a date-stamped collection.
- You can **import selected citations from a database**. Use the URL bar folder icon on search results page and select the items of interest. Or use the database’s features to send the items to the citation manager in RIS format. This should also import associated PDFs where available.



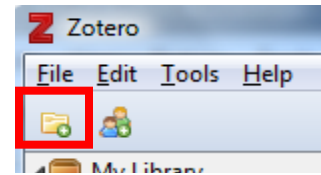
Clicking the folder icon will allow you to select the items from your results list that you’d like to add to your Zotero library.

- For more details, visit https://www.zotero.org/support/getting_stuff_into_your_library

ORGANIZING YOUR COLLECTIONS

Creating Collections

Zotero allows you to sort your items into collections. Click the folder icon to create and name collections.

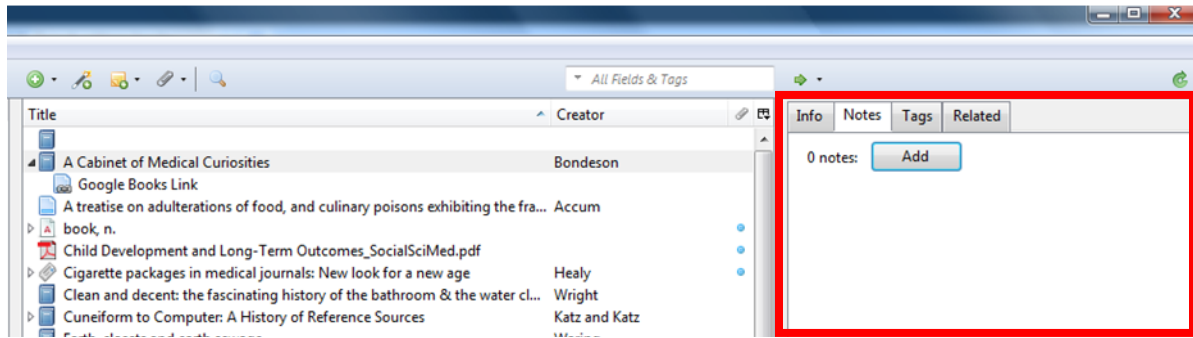


You can also create sub-collections by right clicking a collection name.

Drag and drop items into your collections.

Notes and Tags

Once you've clicked on an item record, you'll see several tabs appear in the record information box on the right.



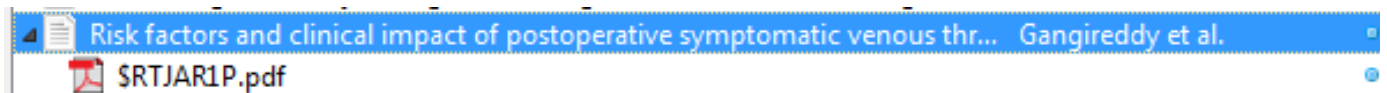
In the **Info tab**, you can make any necessary changes to the bibliographic information.

In the **Notes tab** (shown), you can add an infinite amount of notes relating to the item.

In the **Tags tab**, you can add searchable tags to the item. You can then click the tags in the lower right box to show all items with that tag. You can also add tags by dragging an item title to a tag in the lower right box.

View and Add Associated Files

To view PDFs, saved web pages, and other documents associated with a Zotero collection item, click the arrow next to the item type icon.

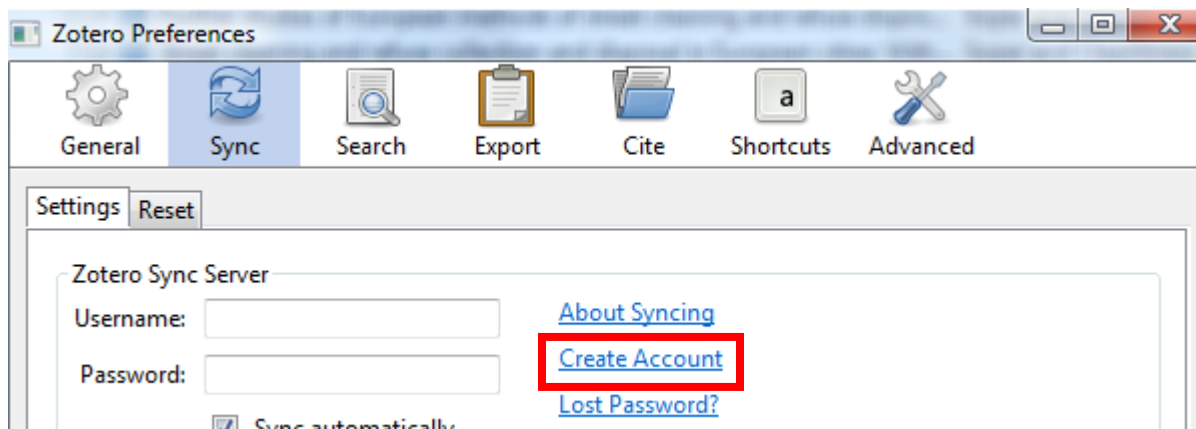


You can add an attachment by right-clicking a record and selecting "Add attachment."

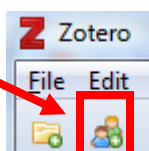
SHARING

Groups

To share and collaborate on Zotero, you first need to set up a Zotero account. To do this, click the **gear icon** and choose **preferences**. Click the **Sync** tab and the **create account** link.



To create a group, click the group icon.



This will bring you to Zotero's website, where you can name the group, specify the type of group you wish to create, invite group members to join (click **Members Setting**), and select which members can view, add, and edit items (click **Library Setting**).

You can drag and drop relevant files from your library into the group folder. You can organize items in a group using folders.


Zotero offers three kinds of groups:

Private groups

Members of a private group can access the same library, share files and notes, and add items.

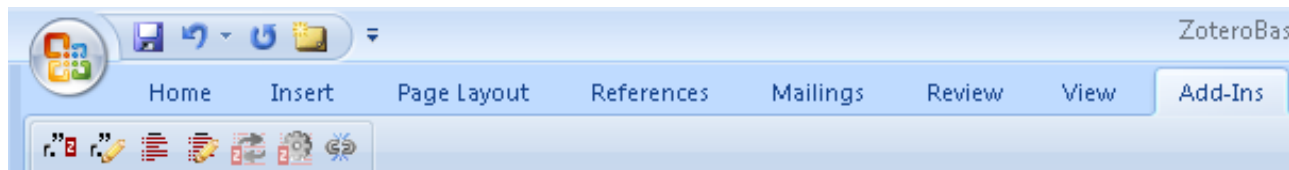
Public Groups


Public groups can have **closed membership** (anyone can view the group online, but members must be invited) or **open membership** (anyone can view and join the group). Open membership groups are only for creating reading lists of materials—any attached files will not be shared.

You may have to use Zotero's sync button () on the top right to update the group library if changes do not appear automatically.

CITATIONS AND BIBLIOGRAPHIES

Zotero's Word plug-in lives in the Add-Ins tab.



1. Place your cursor where you want the citation(s) to appear.
2. Click **Insert Citation.** 
3. In the box that opens, select the citation style you wish to use. If you opt to change the style later, click the gear icon in the Add-Ins tab.
4. Enter a search term to bring up the citation you're looking for. You can enter multiple citations at once. Click the "Classic View" dropdown to select a citation from your full collection list.

Insert a bibliography

Move your cursor to where you want the bibliography to appear. Click **Insert Bibliography.** 

If you notice that a citation is not appearing properly in the bibliography (author fields look odd, capitalization is not correct), update the information within Zotero (not in the Word bibliography).

Then click the **refresh button** () in Word.

MORE INFORMATION

Zotero offers a quick start guide: https://www.zotero.org/support/quick_start_guide

Zotero also offers tutorials: https://www.zotero.org/support/screencast_tutorials

Check out our LibGuide for more on citation managers:
<http://libguides.nyam.org/content.php?pid=536391>

Contact a librarian: library@nyam.org