

Zotero Basics

Get Zotero

1. Go to <https://www.zotero.org/> and click Download now.
2. Download Zotero 5.0 for your operating system **AND** the Zotero Connector for the browser you use.

Get Articles and Documents into Zotero

Import citations from a website

1. Open Zotero.
2. Search a database or website using the browser for which you installed the connector.
3. On the results page, you will see an icon in your web browser's address bar or next to it, depending on which browser you are using. You will see a different icon, depending on whether there are citations on a page, and if so, how many.

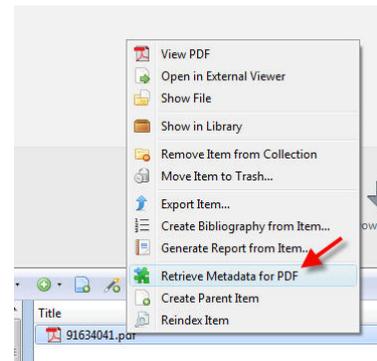


4. Click the icon to add a citation or web page information to your Zotero library.
 - a. If there is more than one citation on a page, all the citations will be displayed in a pop-up box. Check the items you want to save and click Ok.
5. A box will pop up in the bottom right corner to let you know where your items are being saved (in "My Library" or another folder you created).

Import PDFs on your computer

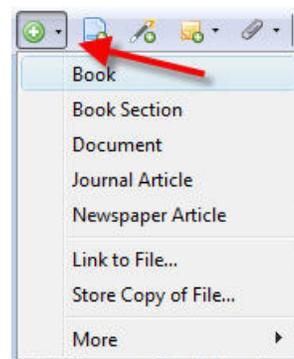
PDFs (and other files) can be dragged from your computer folders to your Zotero library.

1. Open Zotero and click on a Zotero folder.
2. Drag and drop a PDF into the middle (Title) Zotero panel.
3. Right click on it and select "Retrieve metadata for PDF." Metadata may be imported. If not, you can add it manually by right clicking and selecting "Create parent item".



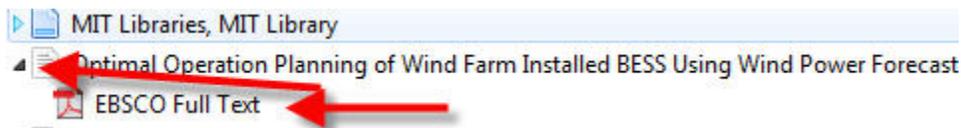
Manually add an item

1. Click on the "Add new item" icon.
2. Choose the type of item, and type in the information.



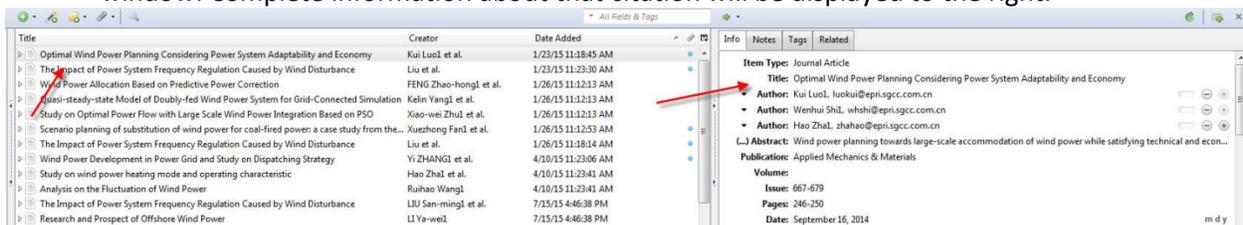
Tips and Tricks:

- Learn more about getting stuff into your library:
https://www.zotero.org/support/getting_stuff_into_your_library
- Where are your downloaded citations and PDFs saved?
 - The default location is the Zotero folder under your username. Example: C:\Users\myusername\Zotero.
 - You can find this by going to Edit > Preferences > Advanced tab > Files and Folders.
 - Click Show Data Directory. Attachments are in the Storage folder.
- Don't see an icon for importing citations from the Web?
 - Make sure Zotero is open and you downloaded the browser extension.
 - The web page you are viewing may have no citation information on it. If you need to save this page, right click anywhere on the page and select Zotero > Create Web Page Item from Current Page.
- Zotero will often save full text documents. Clicking the arrow next to the document title will reveal any saved files.



View Your Citations in Zotero

1. Open Zotero.
2. Any citations you have imported or added manually will be displayed in the main (middle) window. Complete information about that citation will be displayed to the right.



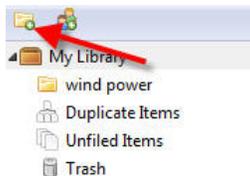
3. Edit the citation information in the panel to the right.

Tips and Tricks

- Choose which fields are displayed in the main window by clicking on the window icon () in the upper right.
- Click on a field name in the main window to sort your citations by that field.
- Check the citation information in the panel on the right after downloading a citation and make any necessary corrections. Most commonly you may notice information in an incorrect field or email addresses listed in the name field.
- Add your own tags (thesis, hw1, etc.) in the information window on the right in order to make it easy to search for certain PDFs.

Create Collections

1. Open Zotero.
2. If you have just installed Zotero, you will see the default folder of My Library. To create new folders to store your references, click the new collection icon.



3. To create a sub-collection, right click on the collection and select New Subcollection.

Tips and Tricks:

- Import items directly into a collection by selecting the folder before saving the citation, or drag items from the My Library folder to a more specific folder.
- Click on My Library to see everything in your Zotero library. Copies of the citations will be moved into your folders, but they will still remain in your library.
- A citation can be placed in many folders at once.
- If you select an item and then select another item while holding down the shift key, you will select all the items in-between.

Create a Zotero Profile

1. Go to zotero.org and click Login to create a profile.
2. In Zotero, go to Edit > Preferences > Sync tab to enter your user information.

This will allow you to:

- Back-up your collection on the Zotero server (you get 300MB for free and can purchase additional storage).
- View your library from different computers
- Share your citations with a group. You can create a group using the people icon () in Zotero.
- Save searches and add results to your personal library automatically. Right click on My Library in Zotero and select “New Saved Search”. The search will create a folder and update it when new items are added to your library that match the search criteria. This is a useful way to see when someone in your group added a new item.

Tips and Tricks:

- You can store an unlimited number of citations on the Zotero server, but PDFs and other associated documents will use your allotted storage space. Use the Sync tab in your Zotero preferences (Edit > Preferences) to stop Zotero from syncing attachments.

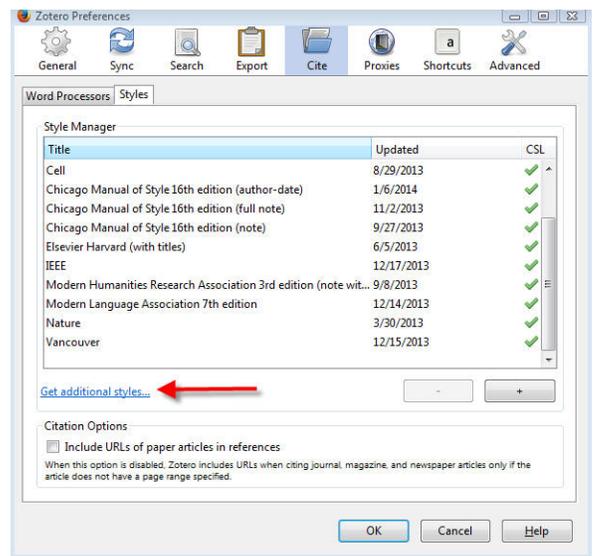
Cite References in your Paper and Create a Bibliography

1. Open Microsoft Word and type your paper. (It also works with Open Office)
2. When you want to add a citation, you will find the Zotero toolbar in a number of places, depending on your operating system, version of Word, and version of Zotero.

- a. In the Zotero tab at the top of the screen.
 - b. In the Add-Ins tab at the top of the screen.
 - c. Hovering around the screen as its own toolbar (labeled with a “Z”).
 - d. In the Scripts menu (the lightning bolt icon on a Mac).
3. Click on the Add/Edit Citation button. This will look different on different systems, but you can hover over any icon to see what it does.
 4. The Z bar will open (you may be asked to choose your citation style first). Search for a document by keyword by typing into the box, or click the “Z” and select classic view to see a list of your documents.



5. Select a citation and click Ok. The citation will be inserted.
6. To change the citation style, click the document preferences. If you do not see your preferred citation style, you can add more to the list by opening Zotero, clicking Edit > Preferences > Cite > Styles Tab and clicking Get additional styles. You can choose from thousands of styles to install.
7. To create a bibliography, move your cursor to where you would like the bibliography inserted, and click the Add/Edit Bibliography button.
8. To remove a document from the bibliography, delete it and hit Refresh. All references to it will also be deleted.



Tips and Tricks:

- To create a list of citations without citing the records first, drag them from the Zotero window into a blank document or select the citations in the Zotero window, right click and select “create bibliography” and paste into Word.
- If you are sending a final draft of your paper to someone else, consider saving a new version of the document and removing the codes with the Unlink Citations button. Zotero inserts codes into Word so the citations can be updated and refreshed. Removing the codes enables someone to view the document if they are using different citation management software. Citation numbers and your bibliography will no longer automatically update if you do this, so make sure to save a copy of your paper first.
- Mendeley and Zotero can usually read each other’s citations in Word, so you could start citing with one program and finish with another, however this can get very messy and lead to errors, so only do this if necessary. Citations from another reference manager will not be added to your Zotero library.

Edit Your Preferences

In Zotero click Edit > Preferences. Some things you might want to change:

- General:
 - Check or uncheck what you want Zotero to do automatically when saving citations from a website, such as download a PDF when available, save an image of the site, tag items, etc.
- Sync:
 - Enter your Zotero account information (or click “Create Account” if you don’t have one.)
 - Check your preferred sync options to your online Zotero account.
- Search:
 - Make sure PDF indexing software is installed and up-to-date, which helps with searching within PDFs.
- Export:
 - Set an export format for exporting references to another program.
- Cite:
 - Install the Microsoft Word add-in under the Word Processors tab.
 - Click the Styles Tab to install more citation styles
- Advanced:
 - If you work from off-campus a lot, enter the resolver: http://owens.mit.edu/sfx_local (version .1) to make it easier for Zotero to access MIT resources.
 - On the Files and Folder tab, view and/or change the Data Directory Location to save your Zotero files to a specific location.