Zotero Overview

Zotero – What Is It and Why It Matters

Zotero is a browser-based citation and research management tool for students. With a few clicks, it saves your online research, and creates proper citation for in-text and bibliographies. Your research is automatically synced to your own personal cloud, no matter what computer you use or where.

Zotero works best with Firefox because it is installed as a browser plug-in; however, it can be used with Chrome and Safari through the Standalone edition.

How To Get Zotero
(Note: the steps may differ due to the browser you decide to use)

- Firefox:
  - Go to zotero.org → download the Firefox extension
- Other browsers:
  - Go to zotero.org → install Zotero Standalone
- If you want Zotero to link to Microsoft Word, download this plugin:
  - www.zotero.org/support/word_processor_plugin_installation
    - This will “speak” directly to Zotero and automatically enter any in-text or bibliographic citations.
- After Zotero is installed, create an account
  - **IMPORTANT**
    - After you create an account, update your Sync Preferences
      - Tools→Preferences→Sync→type in your log in credentials→make sure “Sync automatically” is checked→click “OK”

Citation Styles

Zotero has a plethora of citation styles installed with the program. To select your preferred style:

- Open Zotero→Tools→Preferences→Export→Select “Default Output Format
  - This lists all of the commonly used citation methods

Zotero can find bibliographic information on the pages that you visit!

Importing Data For:

- Books:
  - Firefox: Blue book icon in the right-hand corner.
  - Chrome: Also a blue book icon in the right-hand corner.
  - Safari: Looks like a book on the left-hand side.
Zotero Overview

- **Multiple Items**: use this feature when you have a list you’d like to import to Zotero (i.e. results list from WorldCat)
  - Icon is a folder
  - Select which items you’d like to add to your library ➔ click “OK”

- **Articles & Webpages**
  - Firefox: Icon is a piece of paper
  - For Webpages on Other Browsers
    - You can right-click directly on the page, and then click “Save to Zotero”

*Note: New items will be filed under “Unfiled items”*

**Adding Items By Identifier**
To be used if you already know the item’s ISBN, DOI (digital object identifier) or PubMed ID (PMID).
  - Click the “Add Item by Identifier” icon (it looks like a little wand)
  - Enter in the information and press Enter

**Adding Items You Already Have (PDFs / Images)**
If you have material on a thumb drive or in your computer, you can import them by dragging them into Zotero.

**Adding Items By Hand**
To add an item, click on the green button with the plus sign (➕), select the type of material, and enter in the information.

**Collections and SubCollections**
“My Library” always contains a master list of all your records. If you delete a record from “My Records” it will disappear completely.

To create a new collection, click the new collection icon (folder with a green plus sign) and name the collection.

To create a sub collection within a main collection, right click (or command click for Mac) on the collection you want to create a sub collection for, and click “New Subcollection.” Name this new folder as well.

**Adding Items to Collections / Subcollections**
Just drag and drop the items from “My Library” to the appropriate collection or sub collection.
Zotero Overview

Adding Tags
Using tags in Zotero gives you another way to categorize items by giving them descriptive words to describe them.
  o To add a tag:
    o Select the “Tags” tab (right hand panel) ➔ click on the “Add” button.

Searching Within Your Research
There is a search box that has “All Fields & Tags,” which will search through all the research gathered in Zotero that contains that phrase. The dropdown menu also contains the options of “Title, Creator, and Year” and “Everything.” The latter will search through any notes that you may have added to the record.

Adding Notes to Your Research
Writing notes to accompany your research will help you understand how a particular item will fit into your research.
  o To add a note:
    o Click on the item you want to make a note for ➔ click “Notes” tab (right panel) ➔ click “Add” and begin typing.

Creating a Bibliography & Citation
Zotero can automatically create in-text citations as well as bibliographies in a preferred citation method. There are several ways to do this:

- **Citation**:
  o Edit Menu:
    - Click on the item to create a citation ➔ click “Edit” ➔ “Copy Citation.”
      You can now paste your citation into your paper.
  o Right Click:
    - Select the items to create a citation ➔ right-click ➔ click output method ➔ click “OK”

- **Bibliographies**:
  o Drag and Drop:
    - Select the items to create a bibliography ➔ drag and drop into your paper
  o Right Click:
    - Select the items to create a bibliography ➔ right-click ➔ click output method ➔ click “OK”
  o Edit Menu:
    - Click on the items to create a bibliography ➔ click “Edit” ➔ “Copy Bibliography.” You can now paste your citation into your paper.

To import your EndNote records to Zotero, follow the tutorial here:
https://www.zotero.org/support/kb/importing_records_from_endnote