

## Get Started with Zotero

A free, open-source alternative to products such as RefWorks and EndNote, Zotero captures reference data from many sources, and lets you organize your citations and export bibliographies in many citation formats. You can also use Zotero to store and manage PDFs or other files.

Zotero is an extension for the Firefox web-browser. It runs in its own pane within Firefox, separately from web pages. Zotero works on Windows, Mac and Linux computers.

If you open an account on the Zotero Web site, you can backup your Zotero library and sync it across multiple computers.

### Download & Install Zotero

1. Download and install the Firefox Web browser if needed.
2. Open Firefox, go to **zotero.org** and click the big red **Download** button. 

The image shows a red rectangular button with a white downward-pointing arrow on the left and the word "download" in white lowercase letters on the right. Below the button, the text "Latest version: 2.0.9" is visible in a smaller font.
3. If a **yellow band** appears at the top of the web page saying *Firefox prevented this site (www.zotero.org) from asking you to install software on your computer*, click **Allow**.
4. In the software installation pop up window, click **Install Now**.  
**Note:** the install button may be greyed out for a few seconds while Zotero downloads.
5. **Quit and restart Firefox**. You should see the Zotero logo in the status bar at the bottom-right corner of your Firefox browser window.

**Note:** Firefox checks periodically for updates of installed extensions, including Zotero. You can also update extensions manually from the Firefox Tools menu. Special considerations may apply when updating or upgrading to new versions of Zotero. Be sure to check [zotero.org](http://zotero.org) for details.

### Open Zotero

1. In the bottom-right corner of your browser window, click the **Zotero icon** to open your Zotero library.



2. The *Zotero pane* opens underneath the Web page. In it, references, collections, and notes will be displayed in an iTunes-like layout.
3. To close the Zotero panel, click on the **X** in the upper right of the Zotero toolbar, or click again on the logo in the bottom task bar.

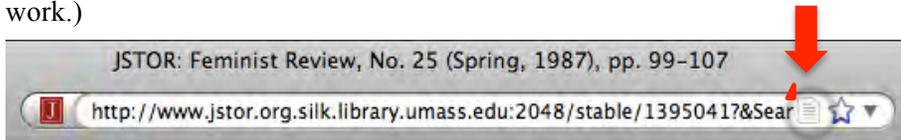
## Save Citations

### Automatically capture bibliographic information from the Web

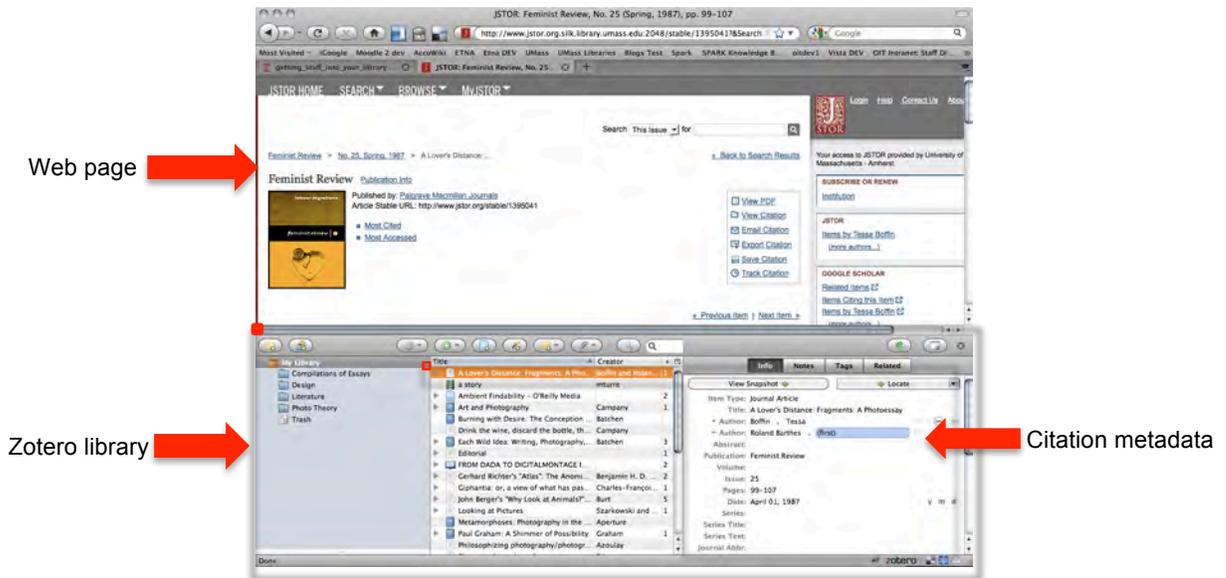
Zotero searches Web pages for citations for books, articles or other resources. Zotero's *site translators* work with most library catalogs, popular websites such as Amazon, Google Scholar, YouTube and the New York Times, and many gated databases.

When Zotero detects a citation, an icon will appear in Firefox's location bar at the top of the browser window, where the current web address, or URL, appears. Depending on the type of resource, the icon will look like a **Book**, an **Article**, or other resource, such as a **Movie** for video.

1. Navigate to a page in a catalog, database, online journal, bookstore or news site, etc.
2. Click the Zotero **resource icon** in the Firefox location bar and the citation information will be saved in your Zotero library. (The Zotero pane does not have to be open for this to work.)

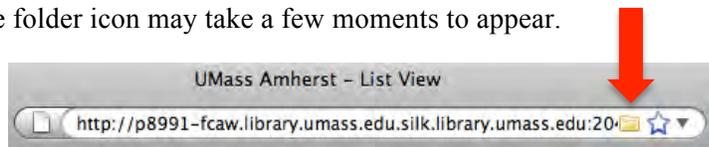


**Note:** Searches that result in more than one result show a **Folder** in the location bar. See below to *save multiple items at once*.

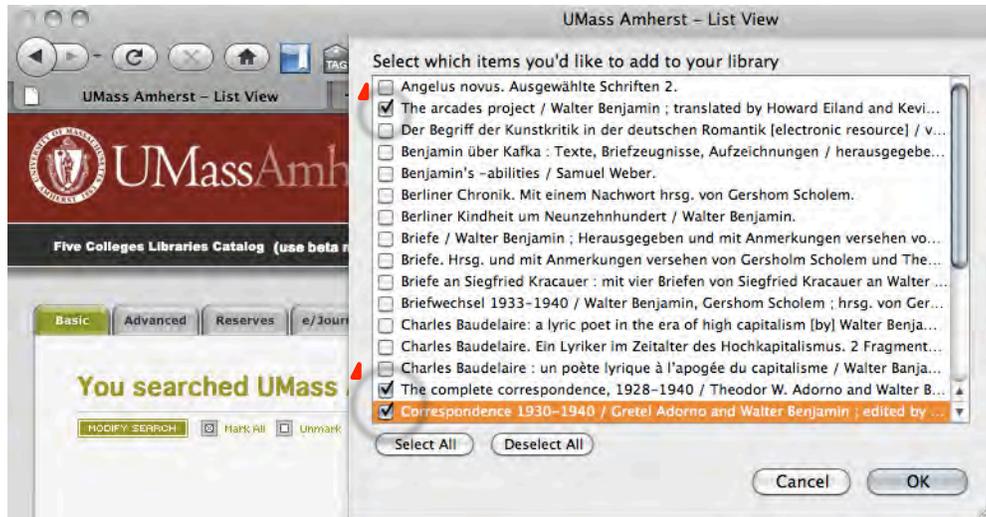


### Save multiple citations at once

1. When you are on a Web page showing search results with many items, you'll see a **folder icon** in the Firefox location bar instead of a book or article icon. **Note:** The folder icon may take a few moments to appear.



2. Click the folder icon for a list of the items on the page.



3. Select the items to save and click OK. References for the checked items will be added to your Zotero library.

### Create a citation by identifier

Zotero can automatically add items to your library using certain unique identifiers.

1. Open your Zotero library (click Zotero button at bottom-right of browser window).
1. In the Zotero toolbar, click the **Add Item by Identifier** button in the toolbar.



2. Enter an **ISBN number**, **Digital Object Identifier (DOI)**, or **PubMed ID** and click OK.
3. The item will appear in your library, metadata and all.

**Note:** The quality of the imported data depends on the source: Zotero uses WorldCat for ISBNs and CrossRef for DOIs. Both are mostly accurate, but not without fail. Most importantly, Zotero commonly fails to import more than the first author of a work from WorldCat.

### Cite a Web page

By default, when you cite a Web page, Zotero adds a snapshot of the page, along with some metadata including the URL. One of the great things about snapshots is that if the Web page is ever moved or taken down, you'll still have access to your copy.

1. Navigate to the Web page you will cite and/or store.
2. Open your Zotero library (click the Zotero button at bottom-right of browser window).
3. In the Zotero toolbar, click the **Create New Item from Current Page** button.



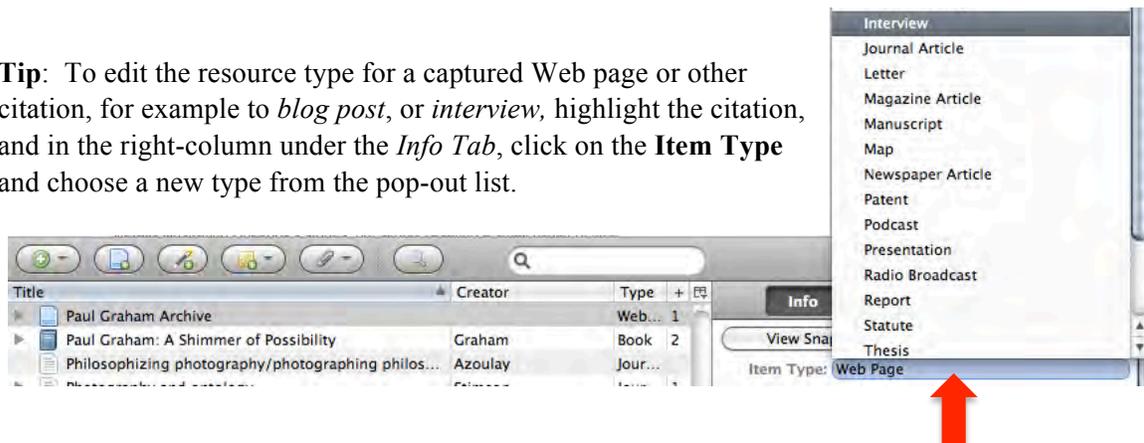
- By default, Zotero makes a snapshot and saves a copy of the web page will be added as a child item.



Double-click the snapshot icon to see the page as it appeared on the day you captured it. Click the URL in the citation panel to return to the live Web site.

**Optional:** To prevent Zotero from capturing a snapshot of Web pages (but still capture the URL), go to the Zotero **Preferences** (Gear icon), and on the *General* tab, uncheck **Automatically take snapshots when creating items from web pages**.

**Tip:** To edit the resource type for a captured Web page or other citation, for example to *blog post*, or *interview*, highlight the citation, and in the right-column under the *Info Tab*, click on the **Item Type** and choose a new type from the pop-out list.



### Manually add items to your library

Not everything you need to use in your research is online. You can manually add items to Zotero:

- Click on the **green plus icon** in the center of the Zotero toolbar and select an **item type** from the drop down menu. Choose **More** for additional item types. (If the options do not fit your item exactly try to find the kind of item that would contain the useful data fields.)
- A blank item of the type you selected will appear in your center column.
- Click on any of the fields in the right column to enter information (title, author, date, etc.).



**Note:** To add additional authors click on the + next to the first author.

### Import records from other reference tools

Many users come to Zotero with collections stored in other reference management software. You can import entire collections into Zotero from these bibliographic file formats:

- Zotero RDF
- MODS (Metadata Object Description Schema)
- BibTeX
- RIS
- Refer/BibIX
- Unqualified Dublin Core RDF

To import records:

1. Click on the gear icon and select “Import.”
2. Browse to your file, select it, and click open.

If the file you have imported is valid and well-formed, the collection should now be in your Zotero library in a uniquely named import folder.

**Important:** See the [zotero.org](http://zotero.org) help pages for important information on using import and export to transfer references from one machine to another or from one reference management system to another and the effect export/import has on plugins for word processors and End Note.

## Generate Bibliographies, Citations and Reports

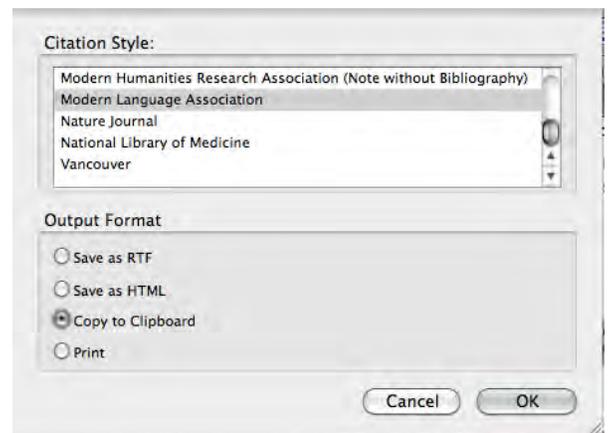
### Quick Copy (Drag-and-Drop)

To quickly add references to a paper, email, or blog post:

1. Go to the Zotero **preferences** (gear), open the **Export tab**, and choose a **citation style** from the Default Output Format dropdown menu.
2. Position your application windows on the screen so that you can see both the Firefox browser window and the window into which to copy the citation.
3. Drag an item from the Zotero panel, and drop it into the text field or onto the document page in the target window.

### Create a bibliography

1. Control-click (Windows) or Command-click (Mac) to highlight multiple references from the center column of the Zotero panel.
2. Right-click (or control-click on Macs) any selected item and select **Create Bibliography from Selected Item(s)**.
3. In the dialog box that opens, choose a citation style for your bibliography format and choose to:
  - *Save as RTF* (rich text file)
  - *Save as HTML* (opens a Web page in your browser window that you can save )
  - *Save to Clipboard* (copies the bibliography to your clipboard to paste into any text field)
  - *Print* (sends your bibliography to a printer)



### Reports

To generate a report about items in a collection:

1. Right click (ctrl-click on a Mac) on any item, set of items, or collection, Zotero and choose **Generate report from selected item(s)**.
2. Zotero will generate a HTML report based on the selected item(s) and display it in your browser window which you can print, save as a Web page or copy and paste into an email.

See the Zotero support pages to learn how to change the sort order on reports, use reports to organize notes you have entered in Zotero's *Notes* field, or to track and assess students during the writing process:

<http://www.zotero.org/support/reports>

## Open a Zotero Account to Backup & Sync your Library

Citations and files are, by default, stored on the local computer you are using when you add them. By creating a user account at Zotero, you can store a copy of your library on the Zotero server and synchronize your library between all the computers you regularly use.

**Note:** All the computers you use must be using the same version of Zotero in order to sync a library.

1. Create a (free) Zotero account (at [zotero.org](http://zotero.org)).
2. Open Zotero's **Preferences** (gear button in the Toolbar of the Zotero pane) and go to the **Sync Tab**.
3. Enter your login information in the Zotero *Sync Server* section.

**Note:** By default, Zotero will sync your data with the server whenever changes are made. To disable automatic syncing, uncheck the *Sync automatically* checkbox.

The first time your Zotero library syncs, Firefox may appear to hang, especially if you have a large library. Be patient!

**Note:** If your library contains attached files, be aware that each user is given 100 MB of free storage for attached files, but larger storage plans can be purchased.

## About using Groups to Share Resources

Groups let you share collections with a class, work with colleagues on a project, or keep track of activity in your field more broadly. To create or join a group you must set up an account on the Zotero server (see above).

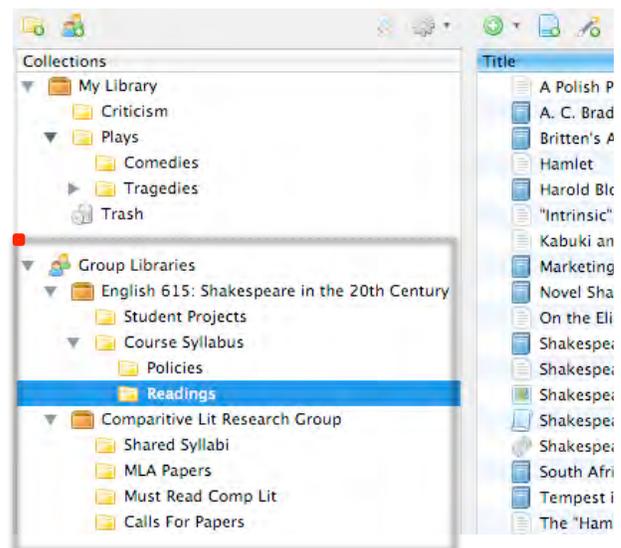
If you are a member of a group and have enabled data syncing in your Zotero in Firefox, the group library will appear in the left column, in a separate section from your *My Library*.

**Private Groups** allow only those invited to join the group or see the group's page.

**Public, Closed Membership Groups** provide a controlled group environment with a public presence. The group can publicly present its work and sources, but the only way to join the group is by invitation.

**Public, Open Membership Groups** are open to the public. Anyone who wants to join can join instantly.

To learn how to create and manage groups see: <http://www.zotero.org/support/groups>.



## Zotero on a Thumb Drive

If you wish to carry your Zotero library with you to use on computers you don't own, or if you object to storing your library on Zotero's servers, you can run Firefox off a portable drive such as a USB thumb drive. See [http://www.zotero.org/support/kb/portable\\_firefox](http://www.zotero.org/support/kb/portable_firefox)

## Working with Attachments

### Automatically download and attach files when you save items

If a PDF is available on the citation page for an article in a database or journal, you can setup Zotero to automatically download and attach the PDF file to the citation (a copy if the file will be stored in your library).

1. In the Zotero toolbar, click the **Actions icon** (gear) and choose **Preferences**.
2. Under the *General* tab, check **Automatically attach associated PDFs and other files when saving items**.
3. When you save a citation by clicking the *article icon* in the Firefox location bar, if a PDF or other file is available, Zotero will download and save a copy. The file will be attached to the citation as a *child item*.
4. To view the file, click the **gray triangle** in front of the citation to expand it, then double-click on the child item to open the file.

### Attach a file to a citation

You can move copies of any type of file into your Zotero library, or you can link to files stored on a local drive.

**Note:** If you are working with an existing collection of PDFs for which you do not have citations, see *Add PDFs to Your Library and Retrieve Metadata*, below.

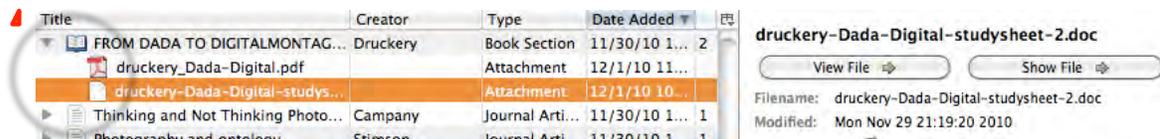
### To attach a file from your local computer to a citation:

1. Add a citation to your library using any of the methods described above.
2. Click the **New Child Attachment** (paperclip) button on the Zotero toolbar.
3. Choose **Attach Stored Copy of File...**
4. Navigate to a word processing document, spreadsheet, image or media file, etc, on your local drive and click OK.

A new copy of the file, separate from the original file, is added to the Zotero data directory (inside the Firefox profile directory), and shows in the Zotero library as a *child* of the citation.

**Note:** If you sync files across computers (see *Synching Zotero across Computers*, below) the file will be copied to your Zotero storage online, and to other computers you sync to your account.

- To view the attached file, click the **grey triangle** in front of the citation title. The attached file will show as a *child item* to the citation. Double-click to open the attachment. The file will open in the default application for their file type set by your Operating System.



### To link to a file without saving a copy in your Zotero library:

The *Link to File* method is most useful if you always work on the same computer and do not sync Zotero using the Zotero server. If you sync your library across computers (see *Synching Zotero across Computers*, below), linked files are updated as references only; the file will not be copied to your account on Zotero and you will not be able to open it from another computer.

- Click the **New Child Attachment** (paperclip) button on the Zotero toolbar.
- Choose **Attach Link to File...**, then locate the file to link to and click OK.
- To view the attached file, click the **grey triangle** in front of the citation title. The link to the file will show as a *child item* to the citation. Double-click to open the attachment. The file will open in the default application for their file type set by your Operating System.

### Add PDFs to your library, and automatically and retrieve metadata

If you are new to Zotero the prospect of importing metadata for a large collection of PDFs might seem daunting. Don't worry! If your PDF is *searchable* (i.e., it was created from a text-based document or is a scanned PDF that has been OCR'd), Zotero can query the Google Scholar database for matches to the text and automatically generate a citation.

- Drag a PDF into your Zotero library or use the **Store Copy of File** option from the *Add New Item* menu (green plus-sign).
- In the center column of the Zotero panel, select the PDF(s) for which to retrieve metadata. Right-click and select **Retrieve Metadata for PDF**.

If a match for a PDF is found, Zotero creates a new library item (citation), fills in the bibliographic metadata for the citation, and attaches the original PDF to the new item.

## Managing Your Library

### There is no save, and no undo in Zotero

As soon as information is entered into your Zotero database it is saved. You can delete an item or edit an item. You can remove an item from a collection. (see below)

### Changing the type of item

Click the **item title** to open its citation panel. On the Info tab, the first field is *Item Type*. Put your cursor over the current type (it will become highlighted) and click for a pop-out menu of item types to choose from. **Note:** Information fields change when you change item types. You may see a warning that some fields will be lost.

### Removing an item from your library

Right-click on the item (Command-click on a Mac) and choose **Delete Selected Item from Library**.

### Viewing an attachment

Click the **gray triangle** in front of an item title to see *child-items* such as attached files. Double click the child-item to view it.

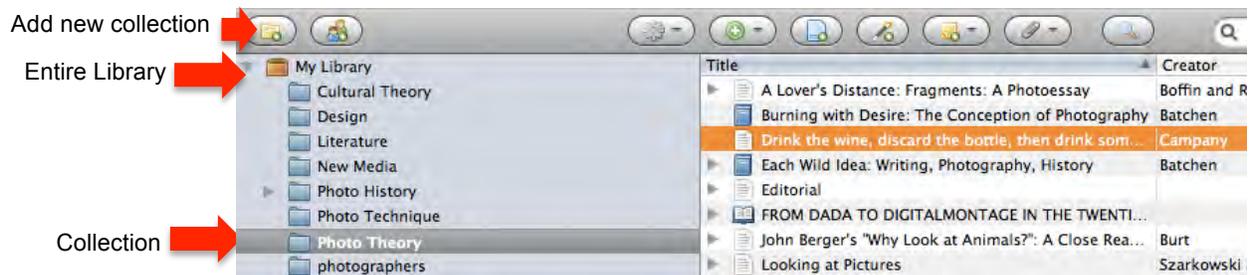
### Searching your library

Simply type a query into the Zotero **Search box** at the top-right of the toolbar. Zotero will search metadata, notes, tags and even search within attached PDFs and saved Web pages.

### Creating Collections

Organize items into folders by research topic or project. Items listed in collections refer to items in your Library; the same citation can be referenced in any number of collections.

1. Click on the **New Collection** icon above the left column. A new *folder* will appear in the left column of the Zotero panel.
2. You will be prompted to give the collection a **title**.
3. To add items to a collection, drag them from the center column over to the new collection, or by add the item to Zotero while the collection is open (highlighted) and the item will also be added to your Library..



### Adding a sub-collection within a collection

Create a new collection then drag it into an existing collection or right-click on an existing collection and choose **New Subcollection**.

### Sorting Library items

To sort items in your Library, or in a Collection or Group:

1. Click a **header** at the top of the center column.

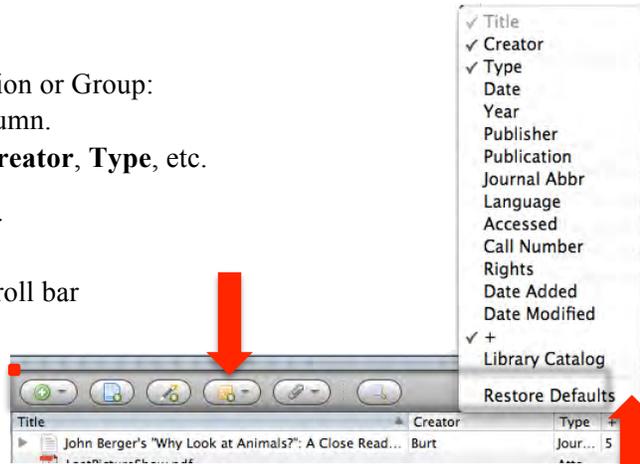
Items in your Library will sort by **Title, Creator, Type, etc.**

2. Click again on a header to invert the order.

### Changing library headers

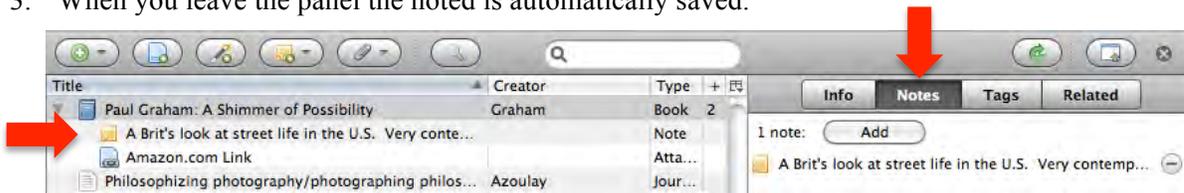
1. Click the **column button** above the scroll bar for the center column and check or uncheck item information to display.

Each checked item adds a header to your Zotero library.



### Adding Notes

1. Click **Notes** at the top of the right column.
2. Click **Add** to open a text box where you can enter text.
3. When you leave the panel the noted is automatically saved.

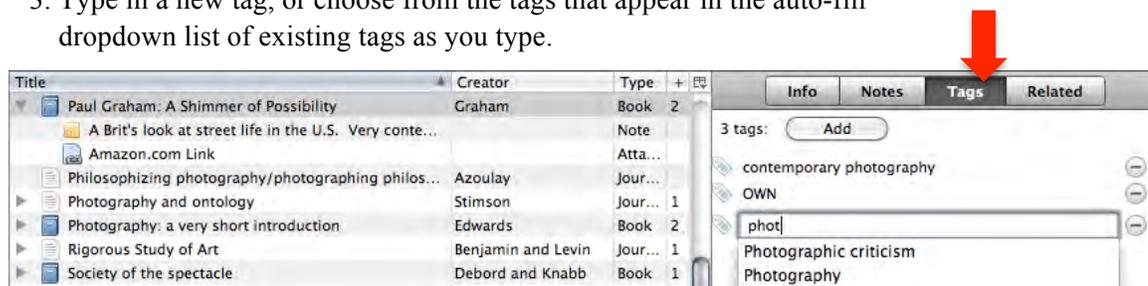


Notes are saved below the associated citation. Click the gray triangle to see notes. Double-click to open.

### Adding Tags

Tags serve as keywords to aid in searching your library. Some citations arrive in Zotero with tags.

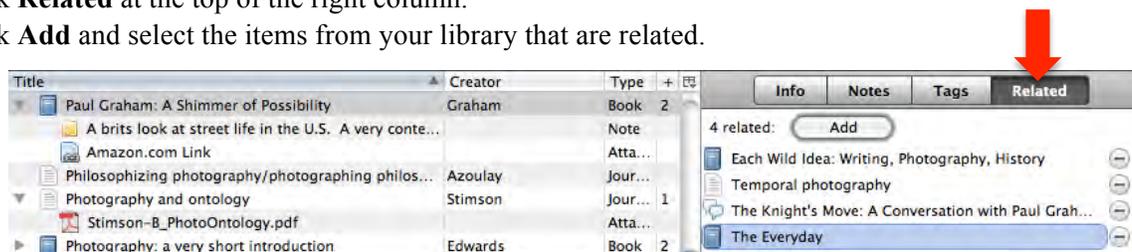
1. Click **Tags** at the top of the right column.
2. Click **Add** to add a tag (you can add as many tags as you like).
3. Type in a new tag, or choose from the tags that appear in the auto-fill dropdown list of existing tags as you type.



### Relating Library items

To associate items under the **Related** tab:

1. Click **Related** at the top of the right column.
2. Click **Add** and select the items from your library that are related.



## Zotero and Word Processors

Zotero provides plugins for Microsoft Word and OpenOffice that generate bibliographies as well as in-text citations and footnotes or end-notes.

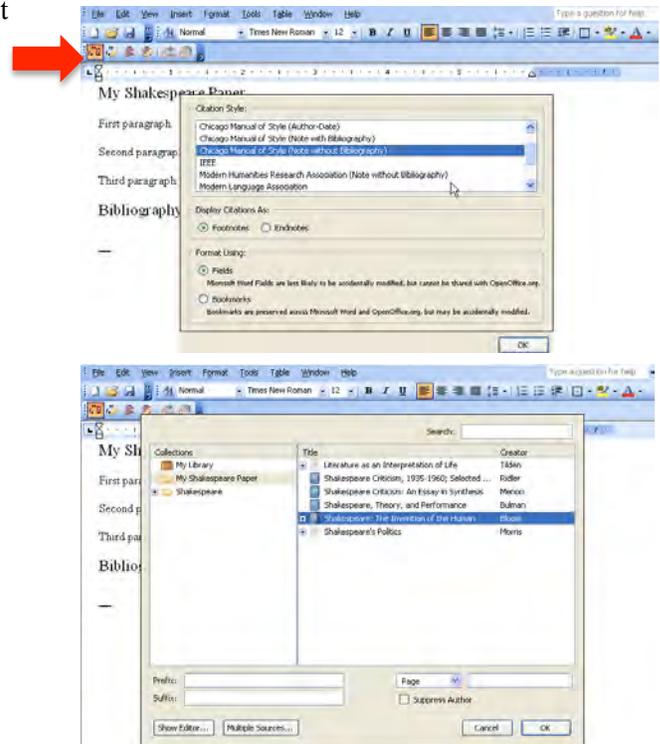
As with EndNote or Write-N-Cite for RefWorks, these plugins create dynamic bibliographies. When you insert a new citation in your manuscript, the bibliography is automatically updated to include the cited item. If you edit an item in your Zotero library you can update the changes to citations and bibliographies in your texts.

### Install the Zotero plugin

1. To download the Microsoft Word (or Open Office) Plugin go to [http://www.zotero.org/support/word\\_processor\\_plugin\\_installation](http://www.zotero.org/support/word_processor_plugin_installation)
2. Make sure Microsoft Word is not running and install the plugin.
3. After installing the plugin, a set of Zotero buttons should appear on the Add-in tab in Word.

### Insert a citation

1. To insert a citation, click to insert your cursor in your Word document exactly where you want the citation to appear.
2. In the **Add-ins** tab menu click the **Insert Citation** button (first button on toolbar). A Zotero window will open.
3. Choose a citation style and click OK.
4. Select the reference to cite and click OK. Zotero will add the citation at your cursor.



### Add a bibliography

1. At the end of your paper, click the third button: **Insert Bibliography**. Your bibliography will appear.  
**Note:** As you add new citations to the paper, they will be added automatically added to the bibliography.
2. To change bibliographic styles, click the last button on the toolbar: **Set Doc Pref**, and choose a style.