

# USING ZOTERO

## Step 1. Download & Set preferences

- a. Download Zotero from [zotero.org](http://zotero.org). You have two options:
  - Zotero for Firefox lets you capture and organize all your research without ever leaving the Firefox browser. You have to use the Firefox browser both to download the plugin AND to use Zotero. If you download the Firefox plugin for Zotero, you should also download the plugin for Word OR for LibreOffice / Open Office from: [http://www.zotero.org/support/word\\_processor\\_plugin\\_installation](http://www.zotero.org/support/word_processor_plugin_installation)
  - Zotero Standalone runs as a separate application and plugs into your choice of browser (Firefox, Chrome or Safari). Download the appropriate browser extension.
- b. Set preferences. Open the Zotero window in your Firefox browser OR open the Standalone program. Click on the “gear” icon and select “preferences.”
  - On the SYNC tab, you can create an account at [zotero.org](http://zotero.org) if you want to sync your library to the Zotero server and use Zotero on multiple computers OR share references with groups.
  - On the SEARCH tab, under PDF indexing, click the bar to **install the pdf indexers**.
  - On the ADVANCED tab, under Open URL, change the RESOLVER url to:  
**[http://emory-primoprod.hosted.exlibrisgroup.com/openurl/01EMORY/01EMORY\\_services\\_page?](http://emory-primoprod.hosted.exlibrisgroup.com/openurl/01EMORY/01EMORY_services_page?)**

## Step 2. Add stuff to create your Zotero library

- a. Automatically. From a library catalog, or a library database, or sites like the New York Times and Amazon, Zotero detects the info on the page and a Zotero icon will display in your browser. The icon displays either IN your address bar (Chrome), to the left of the address bar (Safari) OR to the right of the address bar next to a “Z” (Firefox). Click on the icon (folder, book, page, etc) to add the item to your library.
- b. No auto detection? You can from many library databases export items in a RIS/Reference Manager/EndNote format and then import them into Zotero (using the gear button).
- c. To save a website as an item, either use the “blue page” icon if one displays, or right click on the page and choose “Save page to Zotero.” **NOTE: DO NOT USE THIS OPTION IF THERE IS A ZOTERO ICON IN THE ADDRESS BAR – USE THAT INSTEAD!!**
  - This will save an image of the page in addition to saving the webpage metadata.
  - The text on the page is searchable in your Zotero library (**if it’s indexed**). To see if it’s indexed, click on the attached page image (it’s an icon with a camera on it). In the far

right column in your Zotero library, you'll see the file information. If it says "Indexed: NO", right click the highlighted item (in the center column) and choose "re-index item." If the information on the right changes to "Indexed: Yes" then the text on that saved page is now searchable in your library.

- d. Add a reference using a **DOI, ISBN, PMID number**: From your Zotero library, click on the "magic wand" icon. Type the number in the box that opens and hit enter. A reference will be added if Zotero can find a matching number.
- e. To add a reference by hand, click on the green plus button in Zotero. Choose the type of item and add the data in the column on the right.
- f. You can attach files to the items in your library. To do so, either choose the paper clip icon at the top of the library OR right click on the item in your library and choose "attach file."
- g. **YOU CAN ALSO DRAG AND DROP A PDF** into Zotero. Then you right click on the pdf and choose "Retrieve metadata for PDF." If there IS metadata attached to the PDF, Zotero can create a reference from the PDF and attach the PDF to the reference.
- h. Some pdfs will become searchable in your library. They must be capable of being indexed however.
  - To see if they are indexed, click on the pdf in your library. In the far right column in your Zotero library, you'll see the file information. If it says "Indexed: NO", right click the highlighted item (in the center column) and choose "reindex item." If the information on the right changes to "Indexed: Yes" then the text of the pdf is now searchable in your library.

### Step 3. Organize and Annotate your library

- a. **Create Collections** – a collection is a group of references – by clicking the folder icon at the top left of the Zotero window. Drag and drop items from whole library into collection (**an item can appear in more than one collection**). OR import an item into Zotero while this collection is open/highlighted.
- b. **Add tags**. Select an item, and in the right column, select the "tags" tab.
  - Your tags display in the left column of your library.
  - You can hide or show the tag display.
  - If you click on a tag in the left column, it will show you only the items in your library with that tag.
  - Deselect the tag by clicking on it again.
- c. **Take notes**. Select an item, right click and choose "add note." You can also add standalone notes. Notes are searchable in your library.

- d. **Search your library.** Use the search box at the top, or click the magnifying glass to get to advanced search.

#### Step 4. Write with Zotero

- a. The Word plugin adds a toolbar to Word. In the Word tabs, it's under "Add-Ins." On Mac Word 2011 and later, it's a free-floating toolbar. In older versions of Mac Word it's under the scroll icon after "Help" in the top menu bar.
- b. To insert a citation, click the first toolbar button, "Zotero Insert Citation." Zotero will prompt you to choose a bibliographic style. Then search for the citation you want and click OK to insert it into the document.
- c. Once you've added all your references, place your cursor at the end of the document and press the third toolbar button to insert the bibliography. **Always check to make sure the bibliography is correct!**
- d. You can also drag & drop Zotero references into a Google Document – or Word (or any text field in a web page) to create a formatted bibliography entry.
- e. You can also create a bibliography if you select references or a folder in your Zotero library, right click to save as RTF, HTML file, or Save to clipboard to paste into any text field, or to print.

#### Step 5. Syncing to the Zotero Server / Group libraries / Collaboration

- a. If you sync your library to the Zotero server, you can access it from multiple computers. The Zotero server provides synchronization, group collaboration, and web access services for Zotero library metadata (bibliographic information), notes, and tags. Zotero server accounts are free. Zotero File Storage is an optional service that adds support for attached files like PDFs, images, and web snapshots to the Zotero server services. To sync, you need to create an account at [zotero.org](http://zotero.org).
  - Open your library.
  - Click on the "gear" icon and select "preferences."
  - Click on the SYNC tab.
  - Click on the "Create Account" link. Create your account and then add the username and password information to the SYNC tab.
  - You can sync up to 300 MB of attached files to the Zotero server free. After that you have to pay for storage.
- b. If you want to share items from your library with others, you can create a Group Library. You need to have a Zotero account to do this. At the top left of your Zotero library, there is an icon with two people, "new group." Click on that to create a group library. You can invite others to

join your library (if you login on the Zotero website) and group members can share references and attached files.

## Step 6. Get help.

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

Research Guide: <http://guides.main.library.emory.edu/zotero>

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