

# Self-Guided Zotero Tutorial

**Kyle Denlinger, Wake Forest University** | Last updated July 2017  
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# Quick note:

During this tutorial, you will be asked to restart your browser. Please open these instructions in a different browser or download them to your computer to prevent losing your place.

Download a PDF version here: [goo.gl/Pm5LYW](https://goo.gl/Pm5LYW)

Last updated July 2017. Please notify [denlinkd@wfu.edu](mailto:denlinkd@wfu.edu) for any corrections.

# You'll need this stuff first:

- A computer running **Windows, macOS, or Linux**. (Sorry, Chromebooks.)
- A current **web browser**. Zotero works best with **Chrome, Safari, Firefox, & Opera**. (Sorry, IE, Edge, etc.)
- A current **word processor**. Zotero works with **Microsoft Word and LibreOffice**. Microsoft Word is demonstrated here. (Sorry, Pages for Mac.)

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# Installing Zotero

In this segment, you will install Zotero and the Zotero connector for your browser.



## **Step 1:**

Save any unsaved work and completely shut down your word processor (e.g., Microsoft Word), if it is running.

# Step 2:

Update your web browser.

- [Chrome](#) (☰ → Help → About Google Chrome)
- [Firefox](#) (☰ → ⓘ → About Firefox)
- [Safari](#) (Mac App Store → Updates)



## **Step 3:**

If prompted, close and restart your browser to finalize any updates.





## Step 4:

In your updated browser, go to [zotero.org](https://zotero.org) and click on **Download**.

[Home](#) > [Downloads](#)

## Zotero 5.0 for Windows

Your personal research assistant

[Download](#)

Other platforms

[macOS](#) · [Linux 32-bit](#) · [Linux 64-bit](#)

[Looking for Zotero 4.0?](#)



## Zotero Connector

to Zotero from your browser

[Install Chrome Connector](#)

Zotero Connectors automatically sense content as you browse the web and allow you to save it to Zotero with a single click.

[Zotero Connectors for other browsers](#)

**This one!**

# Step 5:

## Download Zotero 5.0.

## Step 6:

Open the installation file that you just downloaded. PC users should follow the installation wizard; Mac users should drag the Zotero icon into their Applications folder.

*Error message? Next slide!*

If this is your first time using Zotero and you get the error **The Zotero data directory could not be found**, then select **Use Firefox profile directory**.

If you know that you have an existing Zotero library on your computer, select **Locate** and find your existing directory.

If asked if you want to **import settings from Zotero for Firefox**, select **YES**.

**Big problems?**  
Contact a librarian or  
visit the Zotero forums

# Common Error Messages\*

These error messages were common before the release of Zotero 5.0 in July 2017. Users installing Zotero 4.0 may still see them.



## Zotero 5.0 for Windows

Your personal research

[Download](#)

Other platforms

[macOS](#) · [Linux 32-bit](#) · [Linux 64-bit](#)



## Zotero Connector

Save to Zotero from your browser

[Install Chrome Connector](#)

Zotero Connectors automatically sense content as you browse the web and allow you to save it to Zotero with a single click.

[Zotero Connectors for other browsers](#)

*Right here!*

**Step 7: Install the Zotero Connector for your browser. ([zotero.org/download](https://zotero.org/download))**

## Step 8:

Close and restart your browser, then launch Zotero from your **Applications** menu (Mac) or your **All Programs** menu (Windows).

# Saving Sources

In this segment, you will add sources to your Zotero library both manually and through the Zotero browser connector.

# Three\* ways to save sources:

- **From the Browser Connector**

Save sources directly from databases and journal websites

- **By Item Identifier**

Add books and journal articles by pasting in their ISBN or DOI

- **Manually, from a template**

Add all kinds of sources, even when they're not available online or are difficult to describe.

\* There are more than three ways, but these are the most important to know.



# Add Items from the Browser

Let's add some items from the browser connector. You'll use this method most frequently, as it works on most library databases, journal websites, and research repositories.



# Go to Google Scholar

First, make sure Zotero is open, then go to [scholar.google.com](https://scholar.google.com) in your browser.

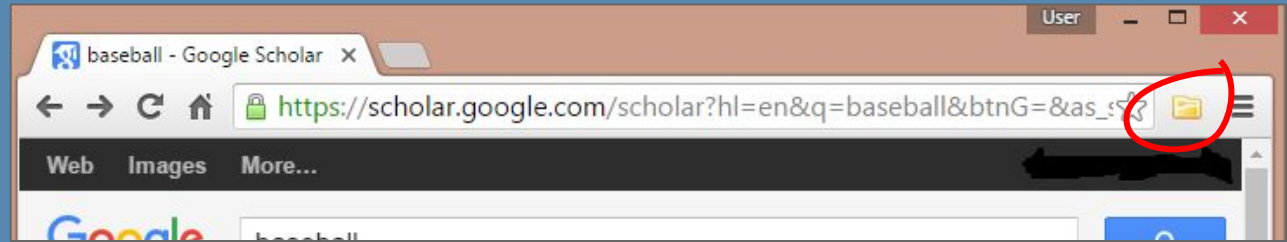
# Search for Sources

In Google Scholar, search for any topic. You should get a list of articles and books. Stay on the search results page.

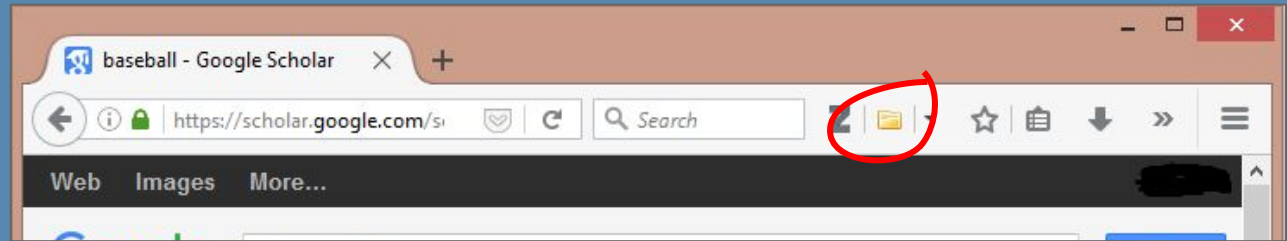
Google Scholar is used here for simplicity's sake. Zotero will work on most library databases, journal websites, and article repositories, as well as many other sites that contain sources.

# See a little folder icon?

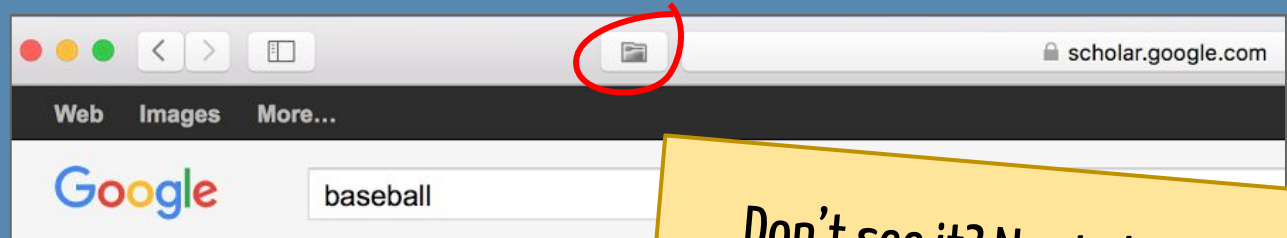
Chrome



Firefox



Safari



Don't see it? Next slide!

Make sure you're looking at a list of search results in *Google Scholar*. Zotero displays a custom save icon only when it can "see" a source on the page, such as a journal article or a book, or when it sees a list of search results containing sources like these. Many regular websites and lists of search results in basic Google Web Search will not display a custom save icon.

Is your browser connector installed correctly? Are you using that browser?

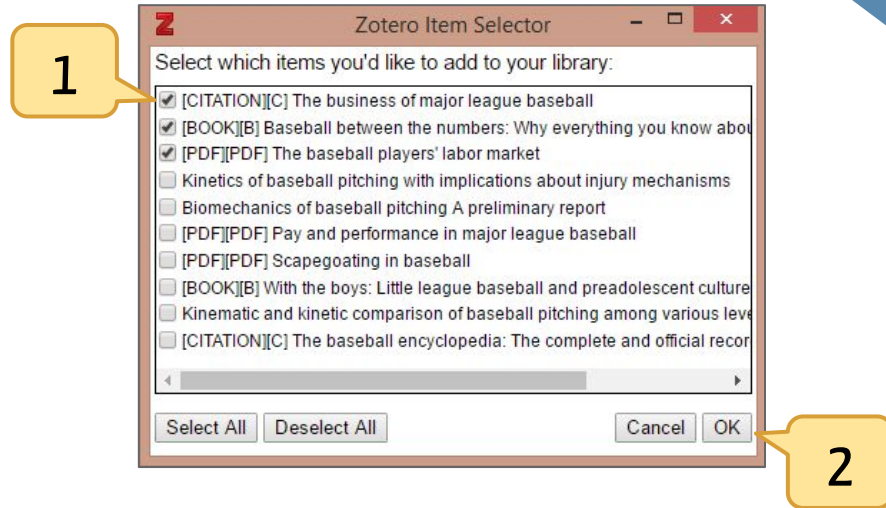
Does closing and restarting your browser fix the problem?

**Big problems?  
Contact a librarian!**

# Don't see the folder icon?

# Select Items

Click the folder icon, then select some items to add to your library. Click OK.  
Check if they were added to your library.

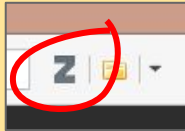


**Trouble? Next slide!**

Make sure that Zotero and the browser extension have been installed correctly, and that both are running.

If you're using **Firefox**, you might already have an old version of Zotero for Firefox installed. Click the Z icon and see if the items have been added there.

(Note: Zotero for Firefox is no longer supported. Contact a librarian.)



Does closing and restarting **Zotero** fix the problem?

Does closing and restarting **your browser** fix the problem?

**Big problems?**  
**Contact a librarian!**

# Items not added to Zotero?

# Add Items by Identifier

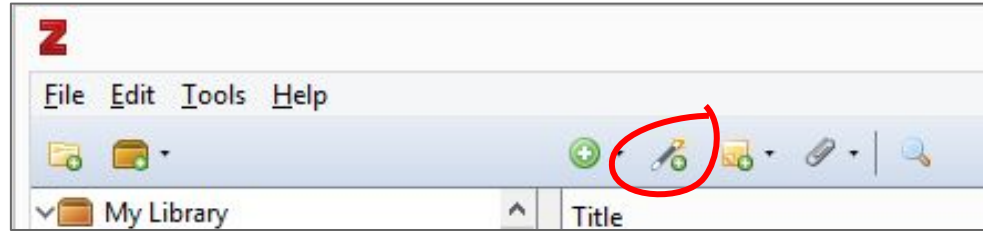
Now let's add an item by its unique identifier number. This is the most reliable way to save information for most books.





# Find an ISBN

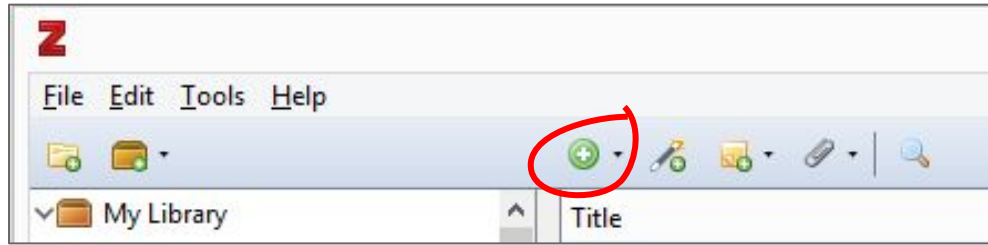
Most books have a serial number (ISBN) that identifies that particular edition. Find any ISBN, or just copy **9780870334337**.



Click the **Add Item by Identifier** button. (It looks like a magic wand.) Type or paste in your ISBN, then hit enter. Your book should be automatically added!

# Add Items Manually

Sometimes you'll need to add sources that aren't online (like manuscripts), sources that are non-standard (like reports), or ephemera or primary sources (like emails, artwork, or podcasts). For these, it's best to add them manually.



Click the **New Item** button (it looks like a green plus sign). Select **More**, then select the type that matches your item.

The image shows a software window with a light blue header and a white main area. At the top, there are four tabs: 'Info', 'Notes', 'Tags', and 'Related'. The 'Info' tab is selected. Below the tabs, the text 'Item Type: Podcast' is displayed. A large, empty text box is labeled 'Title:'. Below this, there is a section for 'Podcaster: (last), (first)' with a small icon to its right. A list of metadata fields follows: 'Abstract:', 'Series Title:', 'Episode Number:', 'File Type:', 'Running Time:', 'URL:', 'Accessed:', 'Language:', 'Short Title:', 'Rights:', and 'Extra:'. At the bottom, the 'Date Added:' and 'Modified:' fields are both set to '6/14/2017, 4:50:21 PM'.

Info Notes Tags Related

Item Type: Podcast

Title:

Podcaster: (last), (first)

Abstract:

Series Title:

Episode Number:

File Type:

Running Time:

URL:

Accessed:

Language:

Short Title:

Rights:

Extra:

Date Added: 6/14/2017, 4:50:21 PM

Modified: 6/14/2017, 4:50:21 PM

# Add Metadata

Now you can manually add all of the item's information in the form that appears.

# Be Careful!

Zotero is super powerful, but it isn't "smart." Zotero **does not know** when an item's data is incomplete or incorrect. It is up to you to correct any errors; **otherwise, your citations will be incorrect!**

# Things to Check:

- Is the **Item Type** correct? For example, is the item a *Book* or a *Book Section*?
- Are all **authors and editors** added and properly attributed?
- Is the **title** complete and accurate? Check for missing subtitles.

# Organizing your Library

In this segment, you will explore the Zotero interface, edit source metadata, organize a “collection,” and add notes and attachments.



The image shows the Zotero desktop application interface with several callout boxes pointing to specific features:

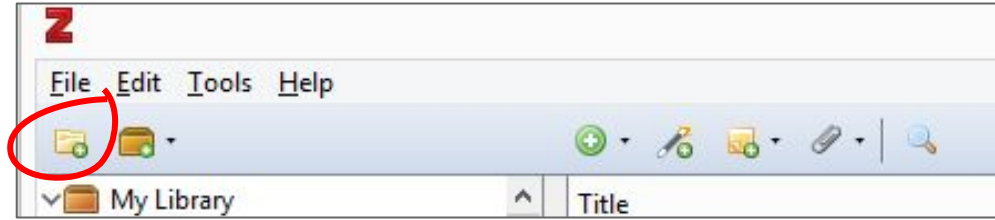
- Preferences/Options (Under Edit in Windows, under Zotero on macOS)**: Points to the top menu bar.
- New item**: Points to the green plus icon in the toolbar.
- Add item by identifier**: Points to the magnifying glass icon in the toolbar.
- Add attachment**: Points to the paperclip icon in the toolbar.
- New note**: Points to the notepad icon in the toolbar.
- Advanced search**: Points to the search icon in the toolbar.
- Basic search**: Points to the search icon in the toolbar.
- Edit columns**: Points to the gear icon in the toolbar.
- Locate selected item**: Points to the location pin icon in the toolbar.
- Sync Server**: Points to the sync icon in the toolbar.
- New collection**: Points to the folder icon in the left sidebar.
- New feed or group**: Points to the RSS icon in the left sidebar.
- Collection**: Points to a folder in the left sidebar.
- Group Libraries**: Points to the 'Group Libraries' section in the left sidebar.
- RSS Feeds**: Points to the 'Feeds' section in the left sidebar.
- Tag sorter**: Points to the 'toread' tag in the left sidebar.
- Libraries & Collections**: A yellow box highlighting the left sidebar.
- Collection contents**: An orange box highlighting the central list of items.
- Item metadata**: A red box highlighting the right-hand details pane.

# The Zotero Interface (Windows)



# Collections

Zotero makes it easy to organize your library into folders, or what it calls **Collections**. You might treat these like music playlists: just as any song can live in any number of playlists, any source can live in any number of collections.



# Create a Collection

To create a new collection, click the **New Collection** icon, right above **My Library**, or right click on **My Library** and select **New Collection**.

# Add Item(s) to a Collection

When you create or save a new item, it is automatically added to the currently selected collection. To add an existing item to a collection, select it from the center column and drag it to the collection. To select multiple items, hold Ctrl/Command while you click.

# Syncing your Library

In this segment, you will create a Zotero account and sync your library to [zotero.org](https://zotero.org).

# Create an Account

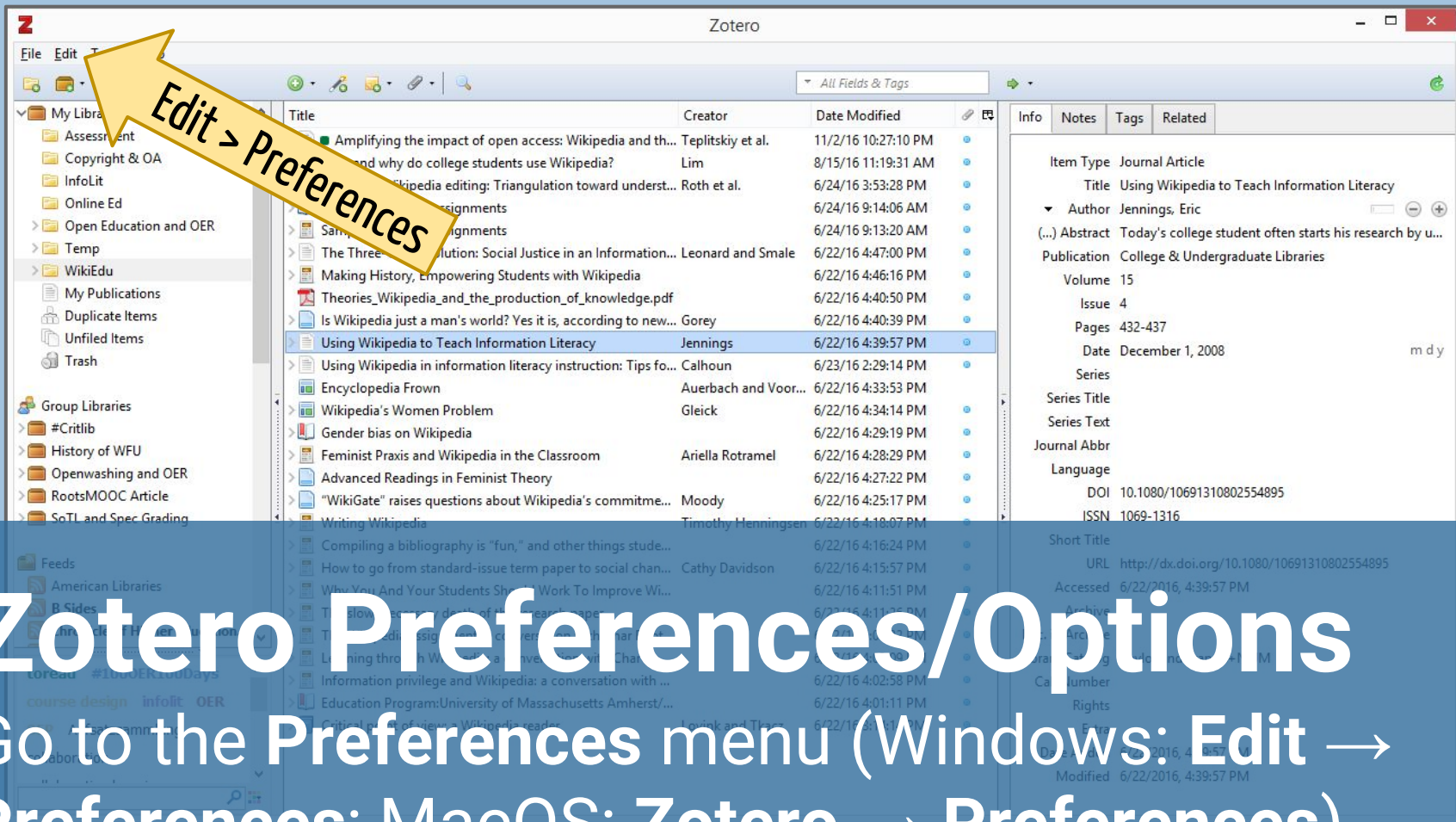
Create a free Zotero account by going to [zotero.org](https://zotero.org) and clicking **Register**. Be sure to use a strong, unique password.

This free account will allow you to sync your library, participate in groups, and post to the Zotero support forums.



# Email Confirmation

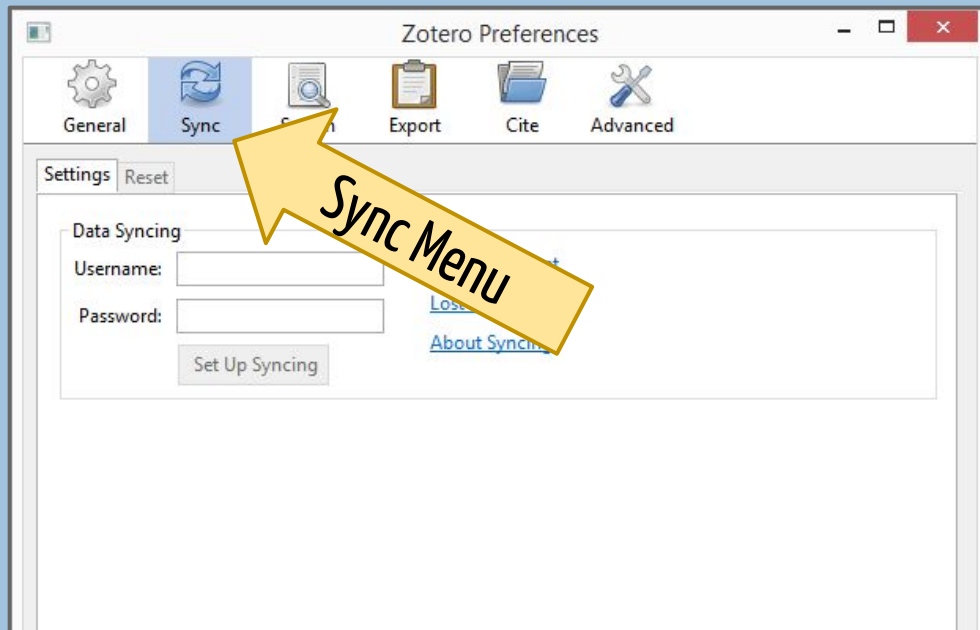
You should soon receive a confirmation email from Zotero. Follow the instructions in that email to verify your new Zotero account.



# Zotero Preferences/Options

Go to the Preferences menu (Windows: **Edit** → Preferences; MacOS: **Zotero** → Preferences)



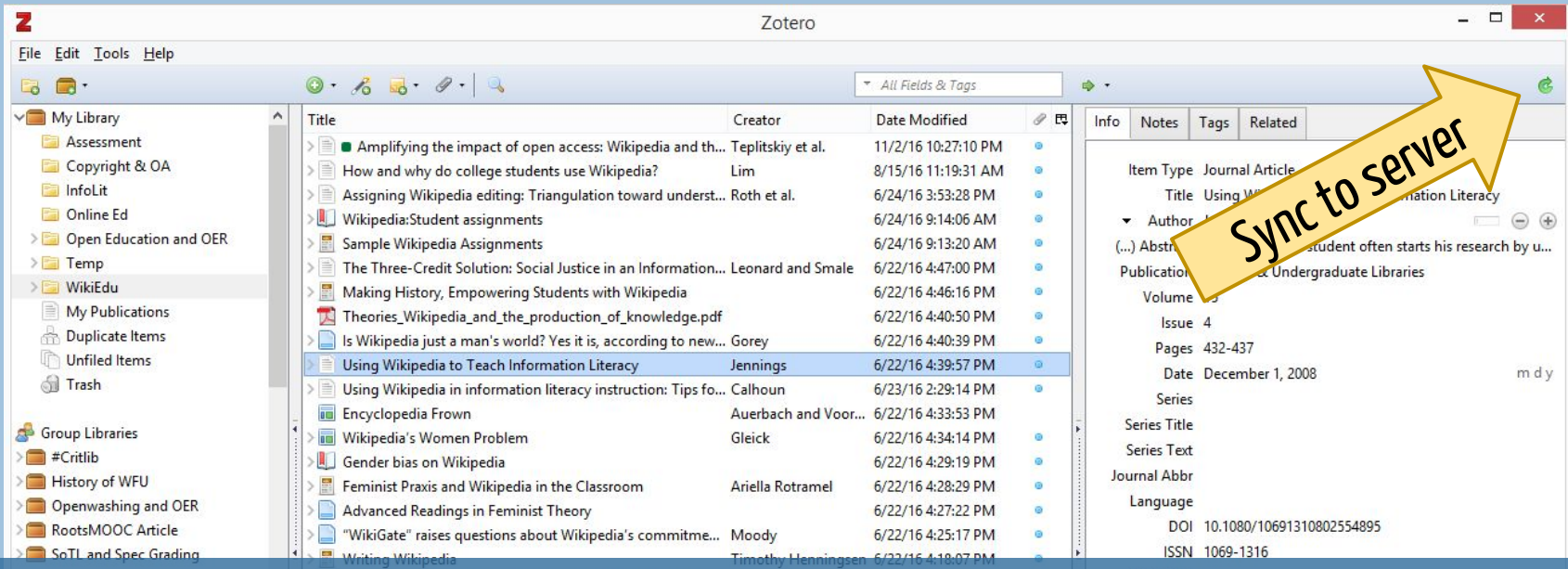


# Enter your Credentials

Enter Zotero credentials into the Data Syncing settings. Click **Set Up Syncing**.

# A Note on Storage:

Zotero provides users with a small amount of free storage space for their library and files. The default sync settings will sync your entire library along with any attachments (like PDFs). These attachment files can quickly fill your free space. To avoid this, you can purchase additional storage space from Zotero or simply turn off the file syncing options. In any case, it's usually best to ensure that **Sync Automatically** remains selected. The free space Zotero provides will almost always be enough for your source data.



# Initiate a Sync

Click the Sync to Zotero Server icon to initiate a manual sync of your library.



# Log in at [zotero.org](https://zotero.org)

Go to [zotero.org](https://zotero.org) and log in. If everything synced correctly, you should now see the sources in your library on [zotero.org](https://zotero.org).

# Citations & Bibliographies

In this segment, you will generate citations and bibliographies using Zotero's Quick Copy feature and the word processor plugin.

# Quick Copy

Sometimes you just need a quick citation. Zotero's **Quick Copy** feature makes it easy to grab a single citation or an entire bibliography directly from your Zotero library. Here's how.



# Quick Copy

To generate a quick bibliographic citation, simply click on a source from your Zotero library and drag it into an email, Google Doc, etc. If you hold **shift** before dragging, it will insert an in-text citation.

# Quick Copy

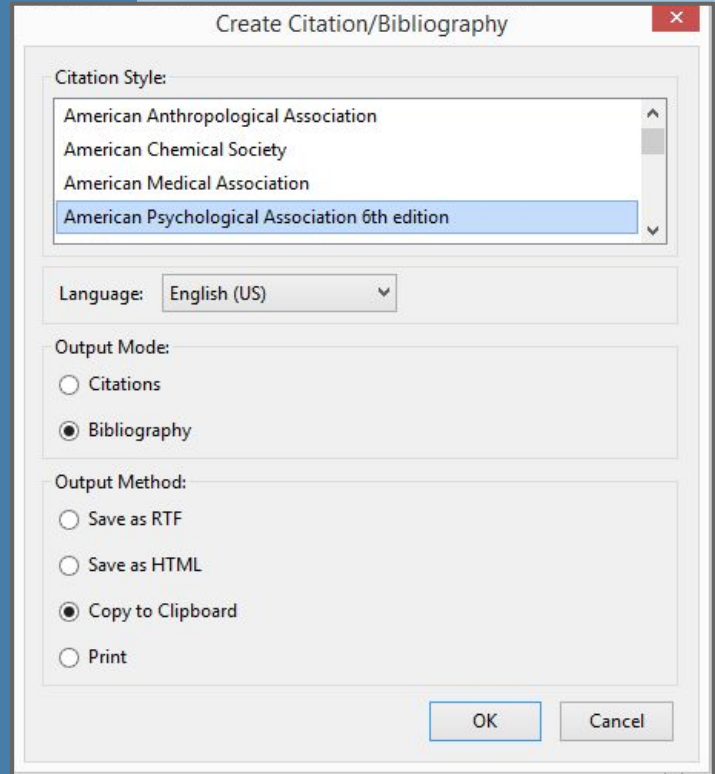
The Quick Copy method will use whatever citation style is set as your default. You may change the default in your Export Preferences: **Edit > Preferences > Export**



# Right Click Menu

Another way to get a quick citation or an entire bibliography is to right click on a single source, a selection of multiple sources, or an entire collection in your Zotero Library. Select **Create Bibliography from Item/Items/Collection.**

Select the citation style you want, select whether you want citations or a bibliography, and select **Copy to Clipboard**. You can now paste your bibliography into a document or text box.



# **Super Important Note:**

Pasting in a bibliography or using the click and drag method (Quick Copy) creates bibliographies that are independent from your Zotero library. Future changes to sources in your library will not affect these bibliographies.

# Cite as you Write

Zotero has awesome “cite as you write” tools for Microsoft Word and [LibreOffice](#) that will keep your citations and bibliographies updated as you write. Here’s how to use it.

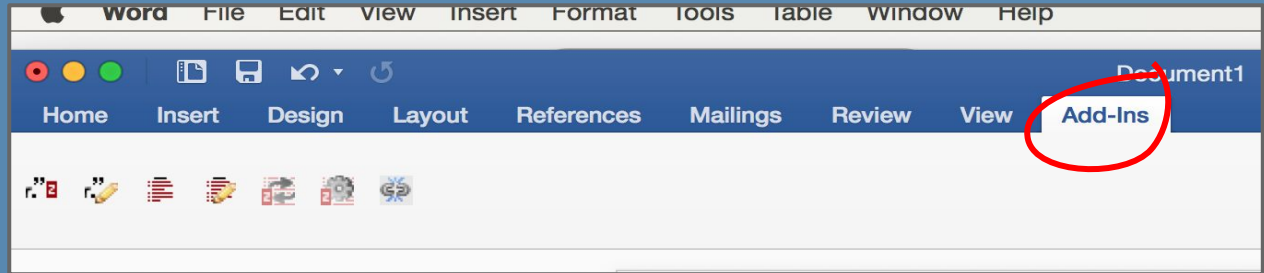
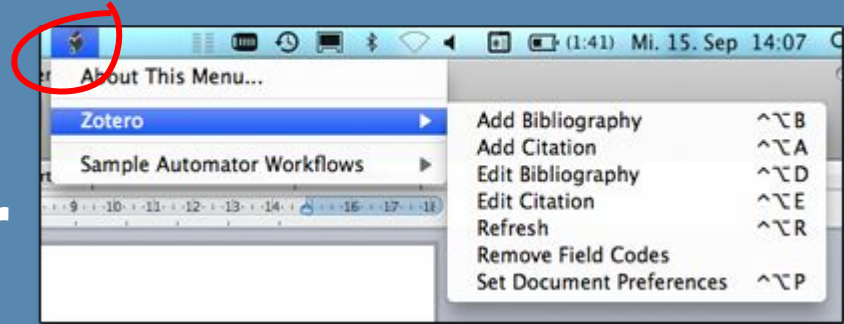
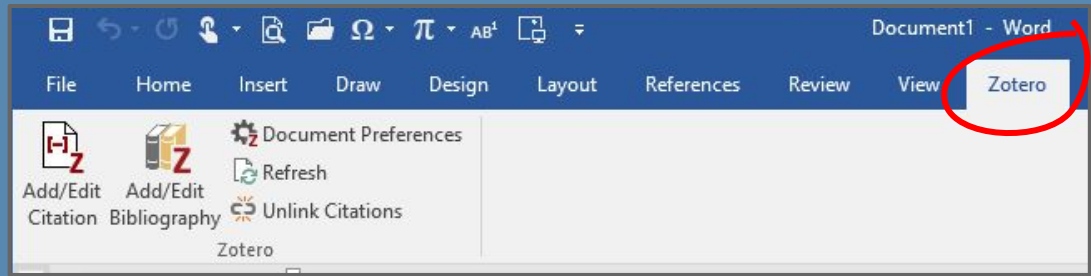


# **Save your Work!**

First, save and close any unsaved work in Word or LibreOffice, then open a new blank document.

# Look around for your Zotero menu or toolbar

It's in different places in different versions of Word and LibreOffice.



Don't see your Zotero toolbar? Next slide!

# Don't see the toolbar in Word?

Try this first:

1. Close your word processor entirely.
2. In Zotero: **Edit > Preferences**
3. In the **Preferences** menu, click **Cite**
4. On the **Word Processors** tab, click the button to install the add-in
5. Restart your word processor

Make sure it's visible:

View > Toolbars > Zotero  
(In most versions of Word)

Big problems?

Contact a librarian or  
visit the Zotero forums

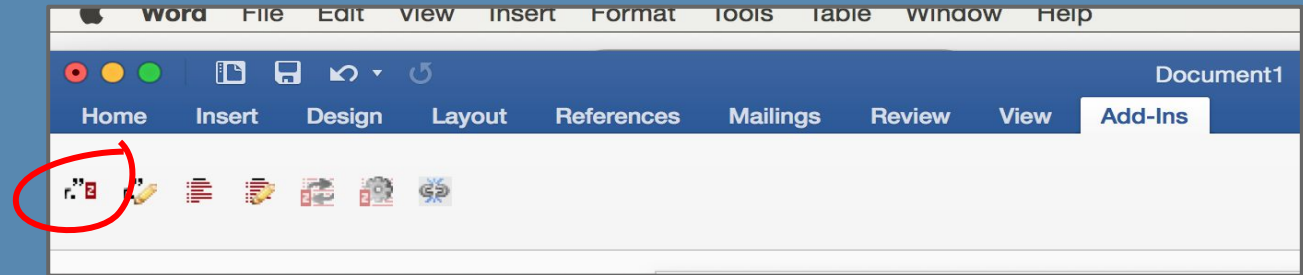
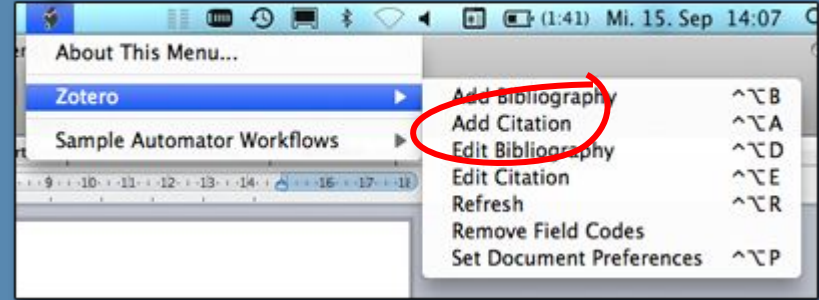
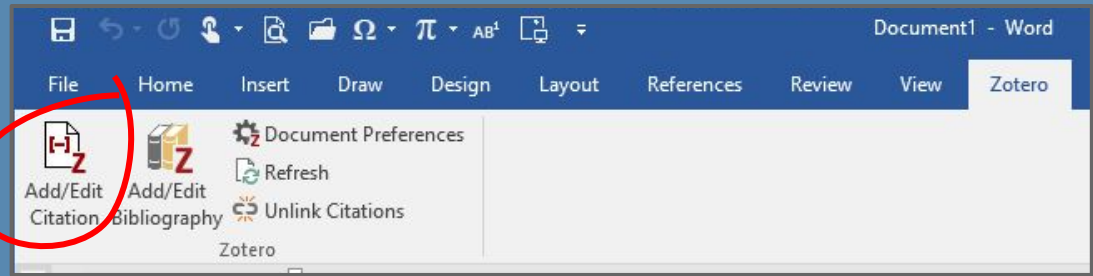


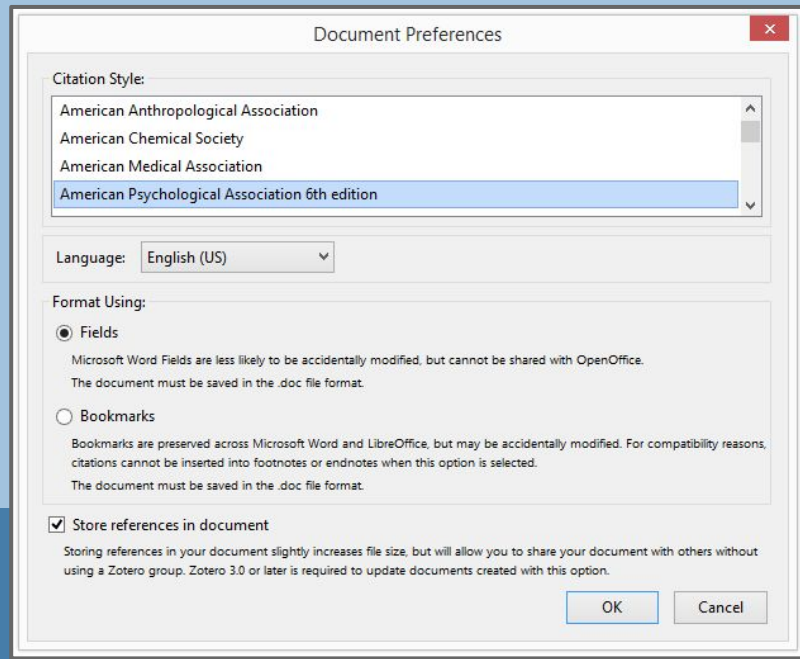
# Add a Citation

The following steps will show you how to add an in-text citation. Most citation styles use in-text citations, but certain styles (e.g. Chicago) use footnotes. Zotero works great with both.

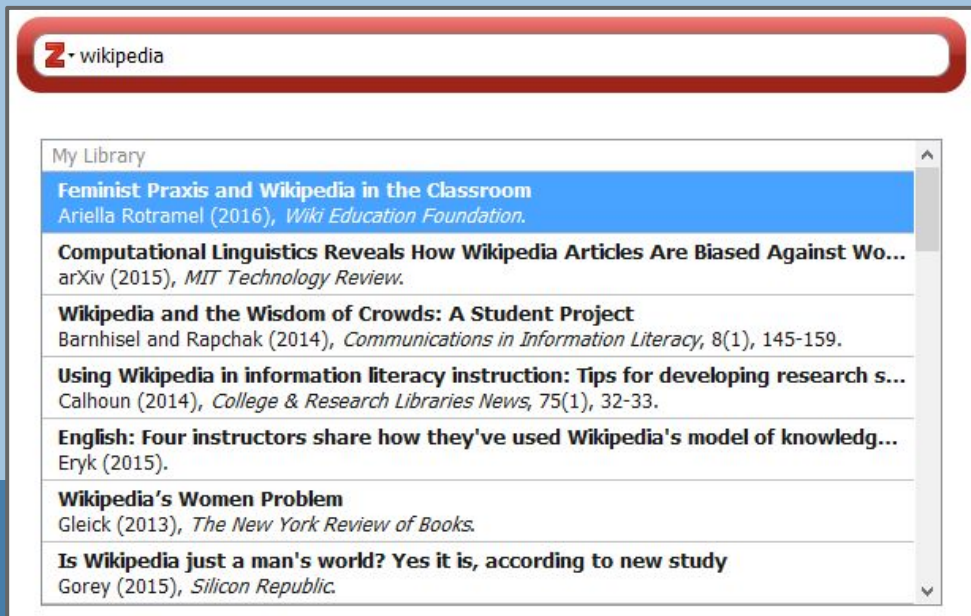


Place your cursor where you want the citation to go, then click **Add Citation**.





If this is a new file, you'll first see the **Document Preferences** window. Pick a citation style from the list, then click **OK**.



In the red search bar that appears, search for and select an article in your Zotero library. Hit enter to insert the citation.



# Edit a Citation

The following steps will show you how to add additional sources, page numbers, or prefix or suffix info to an existing citation.

## Super Important Note:

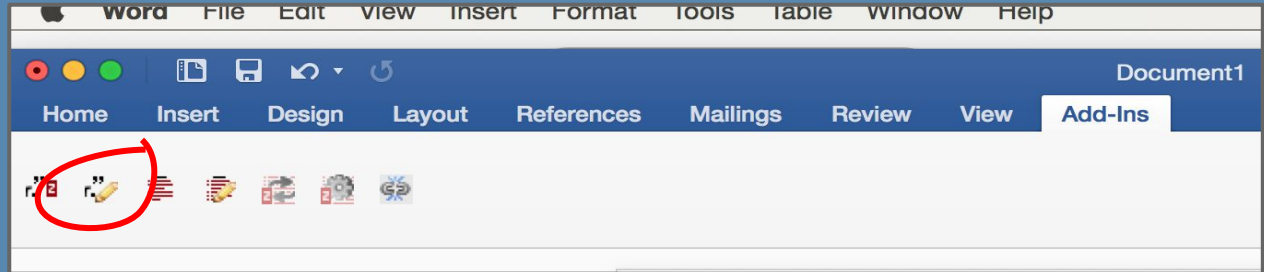
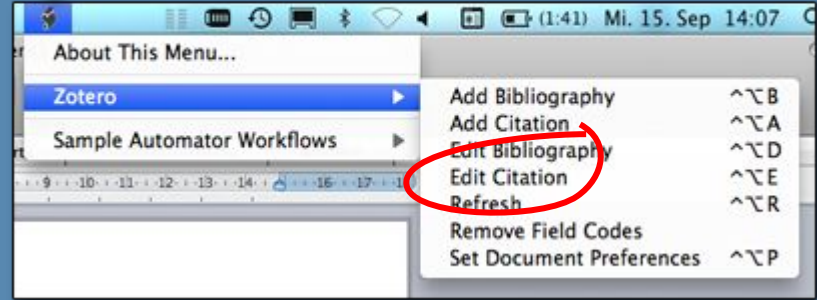
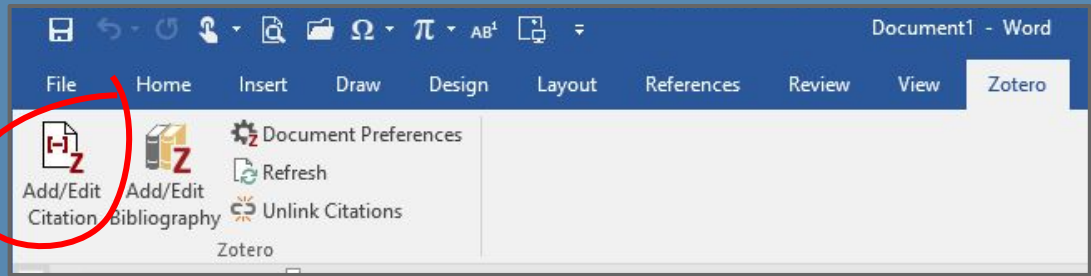
You might be tempted to type directly into a citation to add a page number or remove an author's name. **Don't do this!** Zotero won't recognize your edits and you might lose important citation info.



# Choose your Citation

First, select the citation you'd like to edit.  
Click on it--it should turn gray.

# Click Edit Citation



(Barnhisel & Rapchak, 2014)

Z Barnhisel and Rapchak, 2014

**Wikipedia and the Wisdom of Crowds: A Student Project**

Barnhisel and Rapchak (2014), *Communications in Information Literacy*

Page ▾

Prefix:

Suffix:

Suppress Author

Open in My Library

In the red search bar, click on the blue bubble of the source you'd like to edit. Add page numbers, a prefix or suffix, or "suppress author" where appropriate.



(Barnhisel & Rapchak, 2014, p. 23; Calhoun, 2014, p. 13; Eryk, 2015, p. 151)

Z • Barnhisel and Rapchak, 2014, p. 23 Calhoun, 2014, p. 13 Eryk, 2015, p. 151

English: Four instructors share how they've used Wikipedia's model of knowledge production to probe deeper into politics of access and representation, questions of authorship, and the study of ideology.

Eryk (2015).

Page ▾ 151

Prefix:

Suffix:

Suppress Author

Open in My Library

You can also add numerous sources to the same citation by adding them to the red search bar. Each source may be edited separately--just click its button.



# **Add a Bibliography**

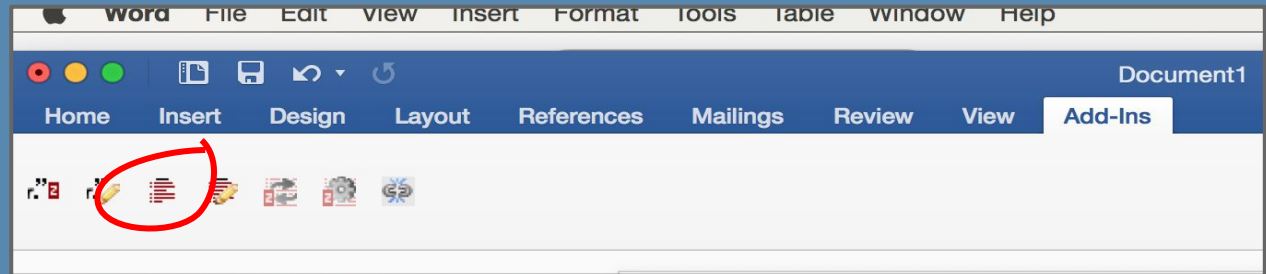
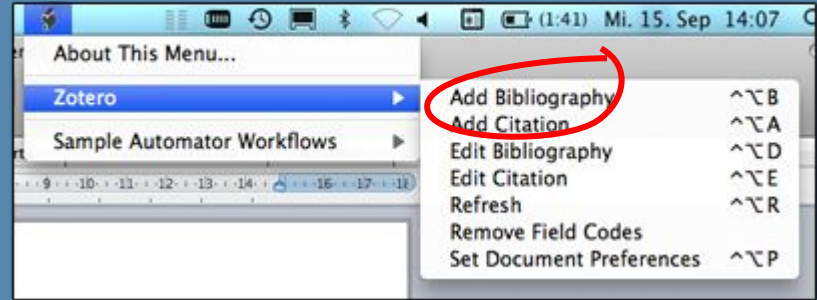
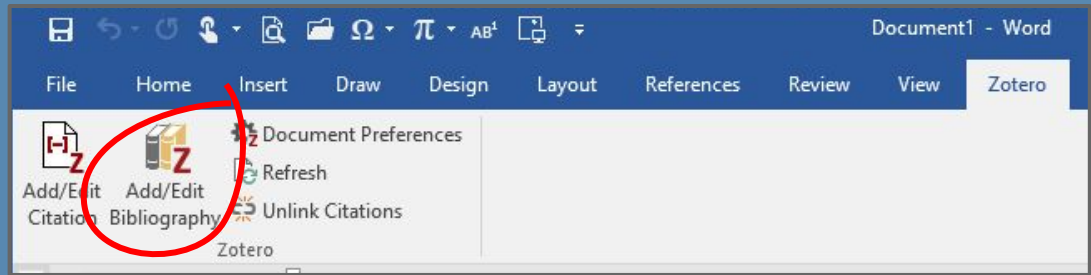
The following steps will show you how to insert a fully-formatted bibliography that includes the works cited in your paper.



# Place your cursor

Usually bibliographies begin on a new page. Be aware that Zotero will insert a bibliography wherever your cursor is located, even if that's right in the middle of your document.

Place your cursor, then  
click **Add Bibliography**





# Add more sources

All of the sources cited in your paper should appear in the bibliography. If you continue to add citations of new sources above in the body of your paper, Zotero will automatically add their references to the bibliography.

## **Super Important Note:**

Zotero is **powerful**, but it's not **smart**. It can't detect mistakes like misspellings, missing info, or incorrectly classified sources. **Always check your bibliography.**



# Correct mistakes

If you catch a mistake, **fix it in your Zotero library**, then click **Refresh** in the Zotero toolbar in Word. Any changes will push throughout your document.

# Need help?

If you encountered problems or need help, search the Zotero forums ([forums.zotero.org](https://forums.zotero.org)) or contact your librarian.

For more Zotero help: [www.zotero.org/support/](https://www.zotero.org/support/)



**Self-Guided Zotero Tutorial by Kyle Denlinger, Wake Forest University.**

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