

Zotero for beginners

USER GUIDE

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Zotero - Download

Zotero is a free, open-source reference manager software. It helps you to collect, organize documents, to insert citations and create a bibliography.

As a first step download the software from zotero.org and add the Connector. The software works well with different operating systems. The Connector helps you to save documents with one click. The browser offers the matching Connector.

[Home](#) > Downloads



Zotero 6 for Windows
Your personal research assistant

[Download](#)

[Other platforms](#)

[Installation Help](#)

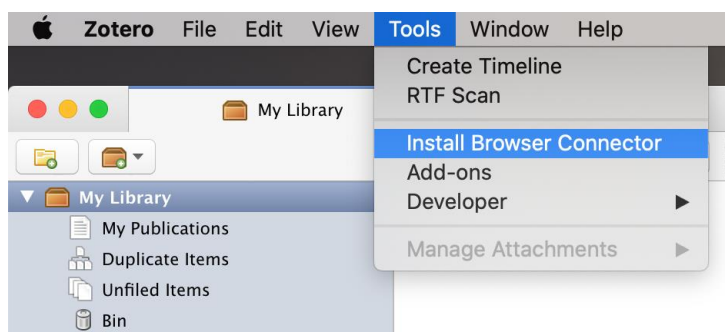
Zotero Connector
Save to Zotero from your browser

[Install Firefox Connector](#)

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

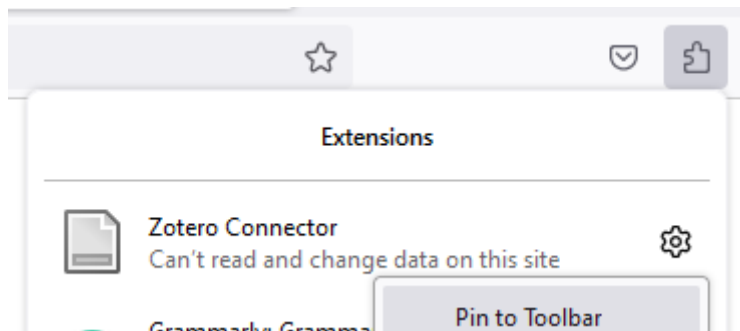
[Zotero Connectors for other browsers](#)

MAC-users: Safari browser might not work together with Zotero Connector. We recommend that you use Chrome for browsing. Zotero itself offers and adds the Chrome Connector:



Alternatively, you might try adding the Connector to Safari from the *Extensions pane* in Safari settings (works only with the latest version of MAC OS).

After downloading, the software's icon will appear on your desktop, while Connector icon will be shown in the URL lane. If the icon does not appear in the URL lane, then Pin it to the Toolbar:



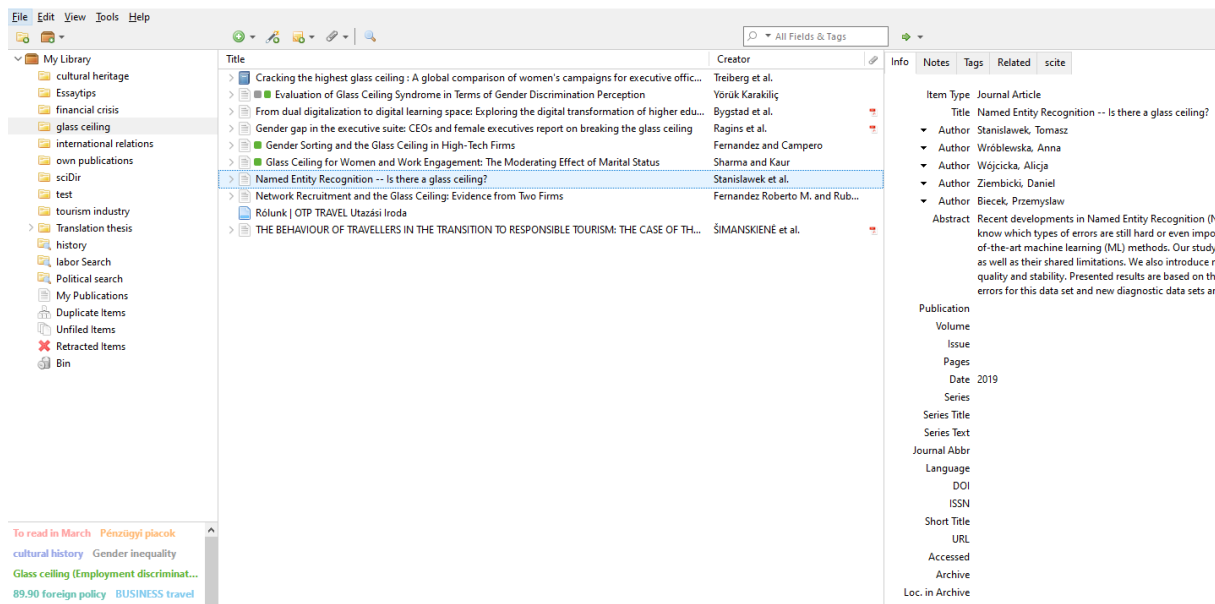
Connector's form depends on the content of the page: it can be a sheet of paper, a folder, a microphone, etc.

Zotero's interface language is the same as the browser's. If you want some alternatives, choose from available languages here: [Edit/Preferences/Advanced/Language](#)

Storage

Basically, Zotero offers 300 MB storage space free. It can be upgraded by [paying extra](#). Important to know, that only full-text pdfs use the storage, while metadata in themselves, not. Full text pdfs, if downloaded, are stored in the user's PC, so they can be accessed offline as well. At synchronization it can be defined whether to upload pdfs into the cloud. For further information check the chapter [Registration and Synchronisation](#).


Zotero's platform



Left column: Basic folders are grey:

- My publications: here you can put your own documents, from them Zotero creates a bibliography and makes it available publicly on Zotero.org website.
- Duplicate items: if you have accidentally downloaded the same documents more than once, Zotero will collect them here. To merge the items, click on merge button in the right-hand window.
- Unfiled items: all documents that have not been placed into separate folders, will be stored here.
- Bin: anything you no longer need and have been placed here. Items can be restored until they are not deleted from Bin.



To create a new folder, click on the first icon: (New collection):  and name it. You can create subdirectories, rename existing ones, delete unnecessary ones (right click on folders).

Centre column: here you can find the bibliographic data (metadata) of documents you have downloaded. If you click on the small triangle in front of a document, you can see what is attached to it (fulltext, URL, annotation etc.)

Right column:

- Info: the metadata (bibliographic data) that Zotero uses to generate citations. All rows can be revised manually.
- Notes: extra information added to a document, Zotero saves them.
- Tags (keywords, subject headings): added by the search engine, the publisher, the author or privately. All of them are searchable in the left bottom section below the folders.
- Related: linking documents that belong together: book-book chapter, conference volume-proceedings.

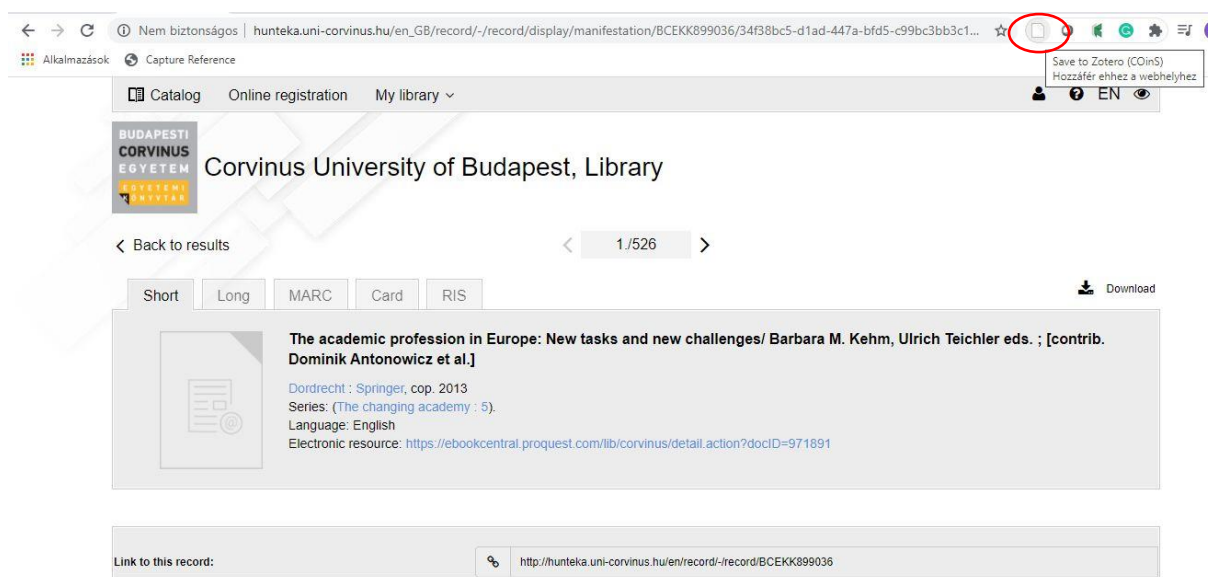
Downloading documents

You can download documents from almost any websites e.g. library catalogue, SuperSearch, GoogleScholar, databases etc. Zotero must be open to save. If you want to save the data to a specific directory, highlight it.

Examples of saving:

Library Catalog

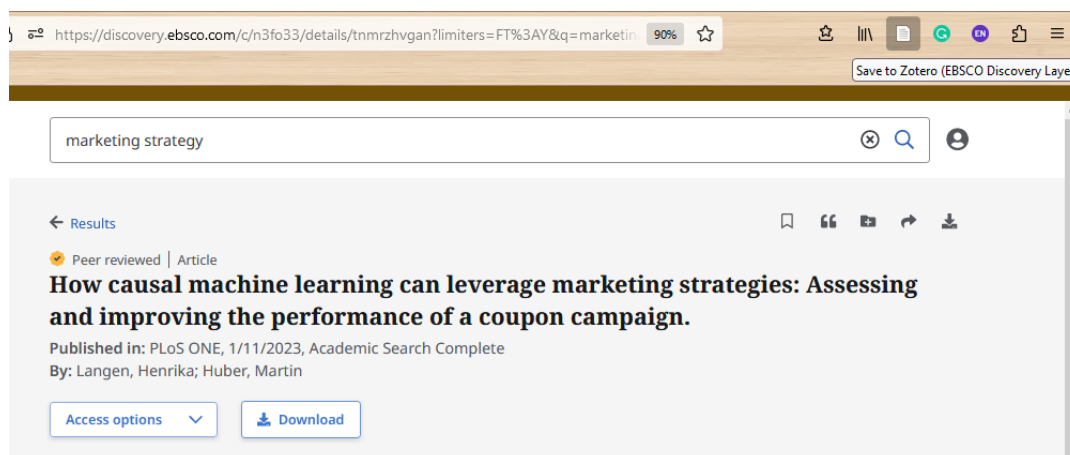
1. You can use the Connector to download records from the catalogue. Open the record and click on the Connector, it will automatically save the record to Zotero.



SuperSearch

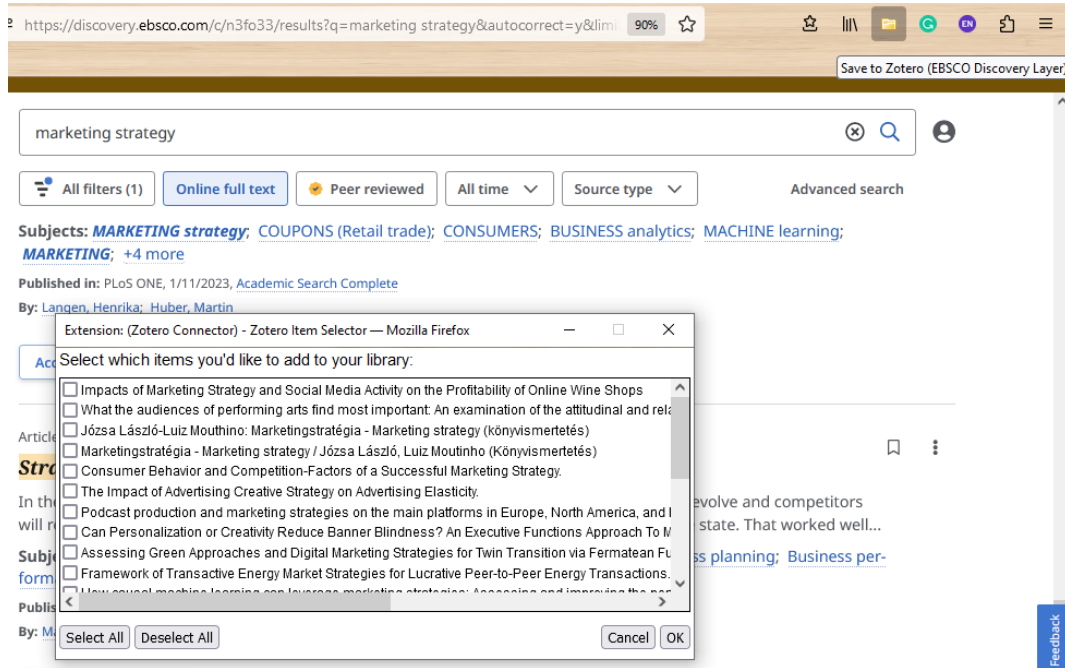
Connector works fine from SuperSearch. One or more records can be downloaded at the same time.

- A) Downloading one record: click on the document title, open it, then click on Connector (looks like a sheet of paper):



A) Downloading more records at the same time:

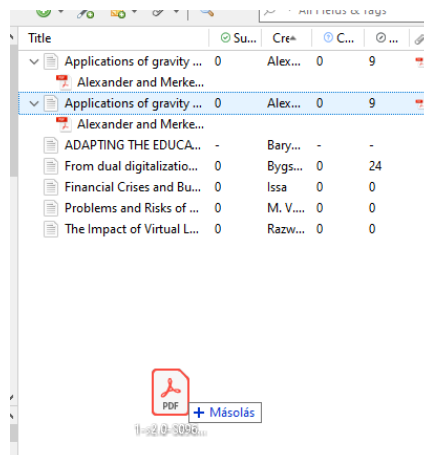
After making a search in SuperSearch, click on Connector, since there are more documents on the page the icon forms a folder. From the pop-up window select the documents you want to download:



Alternative ways to download documents from SuperSearch

1. Download the pdf, retrieve metadata

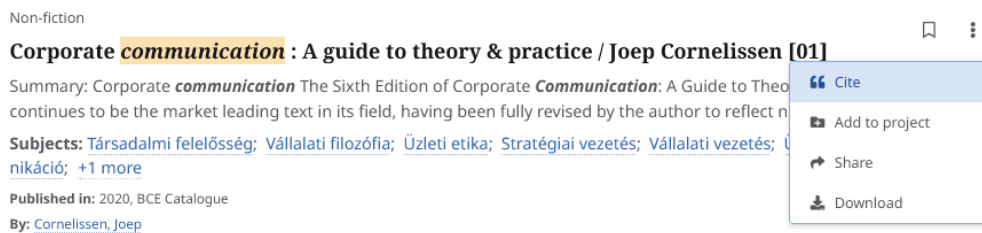
Download the pdf to the desktop and with 'drag and drop' drag it into the centre column:



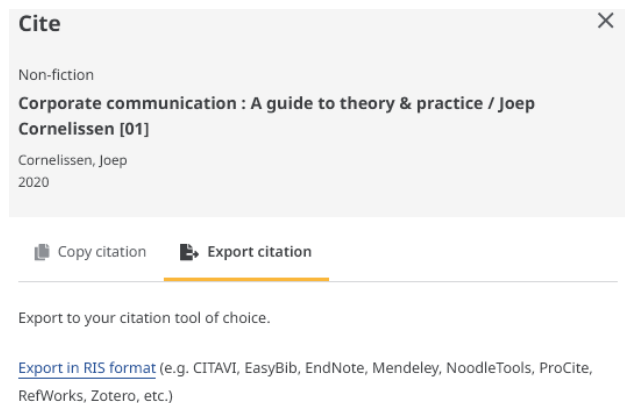
PDFs, in themselves, are not sufficient to insert citations, you need to have also the bibliographic data (metadata). Zotero has a built-in metadata retriever, in most cases it can extract the necessary data from pdf files. This only works for pdfs that are so-called double-layered pdfs (most of the pdfs on the web are that type). If a pdf is created by scanning from a book, it does not contain the metadata. In this case you have to enter the data manually this way: right click and choose "Create parent item.."

B) Saving individual articles as .ris-file

You can find Tools/Cite next to the article:

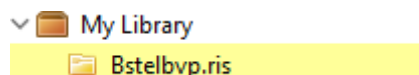


Select Export citation/Export in .ris file



Using this method, metadata go directly into Zotero. Pdfs can be linked to them with right click/Add Attachment/Attach stored copy of file

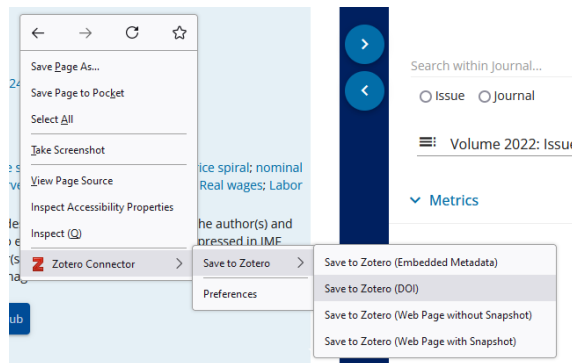
If you want to download several articles at the same time save them first into your Dashboard. From here, select those you need and import them as .ris file into Zotero, using File/Import-function in Zotero. The exported file will be placed among folders, e.g.:



Troubleshooting

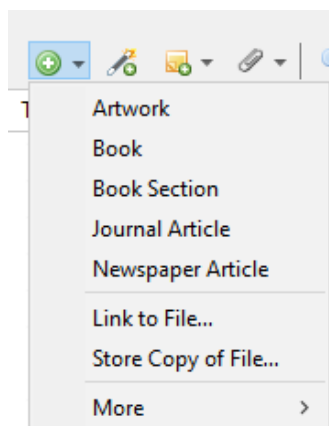
A) If Connector fails:

1. right-click on the page, Zotero, select the form you need:

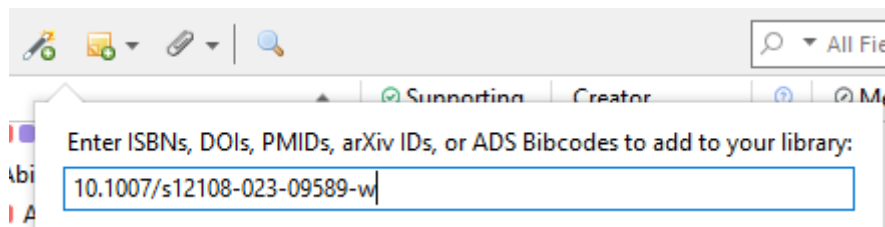


B) If all else fail: manual data entry

In Zotero, click on the little green plus icon, select the document type you need and fill in the data in the right-hand column:



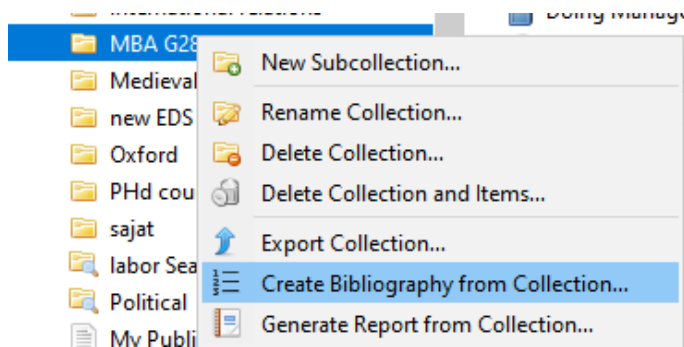
If you click on the next icon (Add item(s) by Identifier), Zotero will search for ISBN, DOI, or any other ID and in most cases finds the metadata and loads the required document:



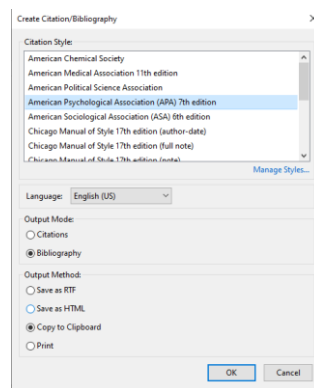
Creating a Bibliography

1. If you were making a bibliography of a collection:

Right click on the collection's name, 'Create bibliography from collection':



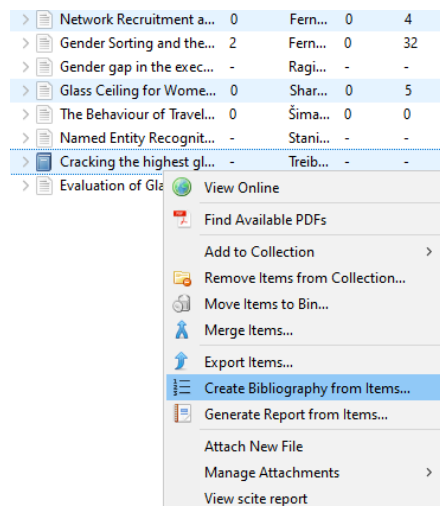
In the pop-up window, select the required reference style, tick Copy to clipboard option and OK:



Open a word processor, CTRL+V to insert the bibliography.

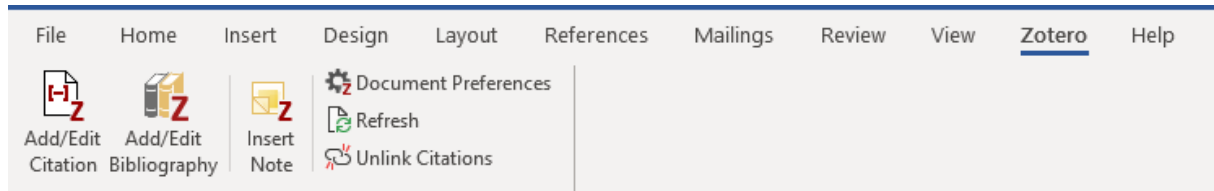
If some of the items in the collection were to be made into a bibliography:

Select them (using CTRL), right-click, "Create bibliography from items", then the previous steps: style selection, copy to clipboard, CTRL+V.

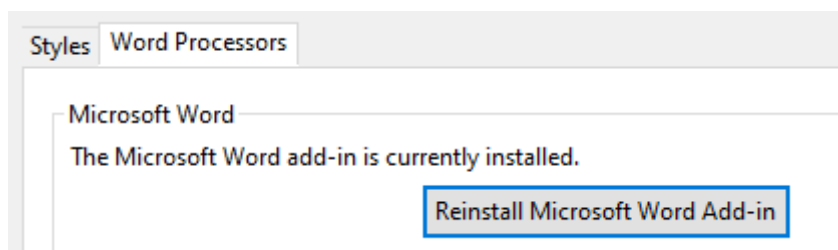


Cite-while-you-write plugin (Inserting citations while writing the text)

With this plugin you can insert citations while writing your paper. First, check whether the word processor has the Zotero tab.



If not, reinstall it: Zotero, Edit/Preferences/Cite/WordProcessors/Reinstall Microsoft Word Add-in



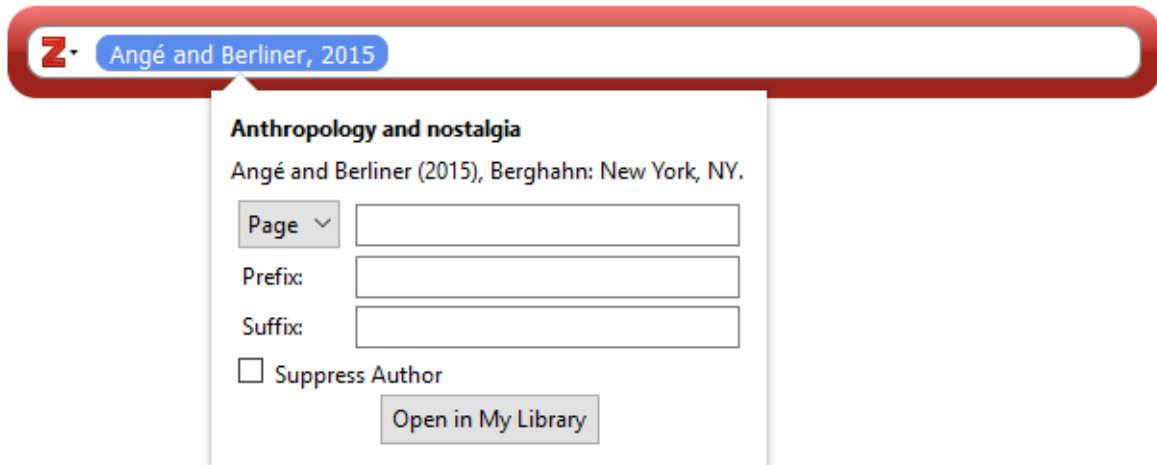
Start writing your paper, if you need a citation, click on the first icon (Add/Edit Citation), select the citation style, then OK:

- a) A red oval bar appears. Here you can enter the words that appear in the documents you have saved, all of which contain the characters you have entered.



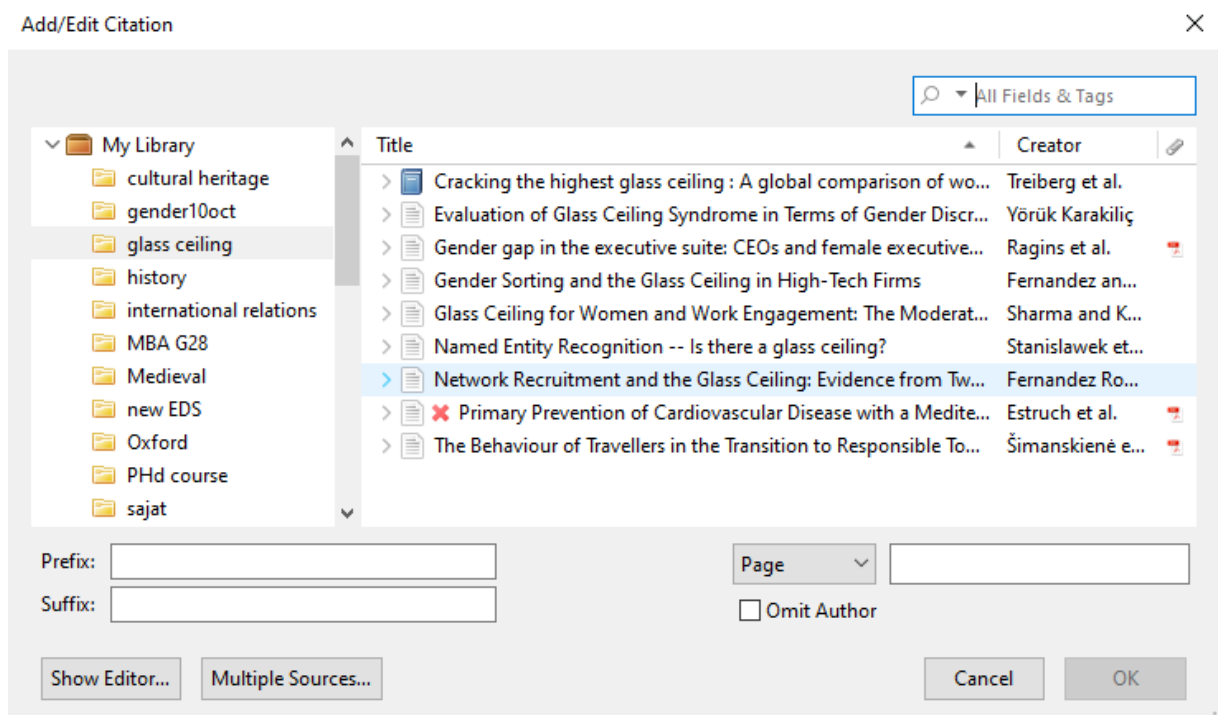
Select the one you want to use, Enter and it's pasted. If you want more than one quote to go in the same place, do not press Enter after selecting the first, but type another word, find the citation you need, press Enter.

To insert a page number, before pressing Enter click on the quote, a pop-up window appears, enter the page number.



Once you have all necessary citations, click on the 2nd icon - Add/Edit bibliography - to insert the bibliography. All references used in the text will be included.

- b) If you do not remember the documents you've saved, when the red oval bar appears click on the little triangle next to the letter Z letter, then click on Classic view. Result:



You can also select the documents you need from here. If you need more citations on the same place, you can set them by clicking on More sources.

If you are creating a narrative citation, the author is embedded in the text, so in-text citation must contain only the publication year, e.g. *Walters (2003) wrote that...* To get a correct citation tick the option *Omit author*. If you do so, Zotero will handle it as a correct citation and will be included in the citation list.

Other icons:

Insert Note: Insert a new note at the current cursor position

Document preferences: Here you can change the citation style at any time during and after the editing process. To do this, simply click on an inserted citation and select Document preferences - new style.

Refresh: if you modify data in Zotero (adding more authors, change the year of publication, etc.) and you have already used that document, clicking on the refresh button will display these changes.

Unlink citations: Zotero uses codes to insert citations. If you click on this button, the connection between Zotero and the document will be broken. **Caution: the process is irreversible!** Only use it when you are completely ready. The best way if you create a copy from the whole document and remove the codes from the copy. If you still need some updating you can use the original version. and you are sure that you no longer want to revise the document.

Why is it useful then?

- If you want to make any manual editing in the bibliography, it is better to do it if there is no active connection between Zotero and the word processor.
- It's either recommended or required by many journal publishers to remove Zotero codes before submission of a manuscript, as Zotero (and other) fields can interfere with publishing and manuscript management systems.

Registration and Synchronisation

The benefits of registration are:

1. You can create group libraries for joint work.
2. If you need any technical help, developers and other users can help you in [Forums](#).
3. Synchronisation: saved documents are also stored in the cloud, so if you replace your computer your data won't be lost.

You can register in Zotero.org and group libraries can be set also here.

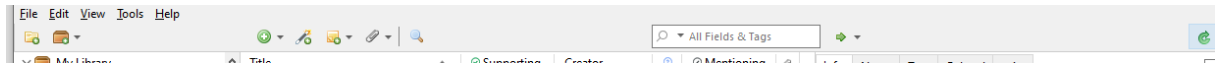
Synchronisation: very useful if you use not only your PC but also a common computer (e.g. PCs in reading halls).

Enter the data you have used at registration here: Edit/Preferences/Sync, Settings.

Synchronisation is divided into two parts: Data Syncing and File Syncing

Data Syncing:

- Sync automatically: if you tick it, Zotero will upload the newly downloaded data into the cloud almost immediately. If not ticked, you can still synchronize manually by clicking on the small green arrow (right upper corner):



- Sync full-text content: notes, annotations added to the document will also be synchronized

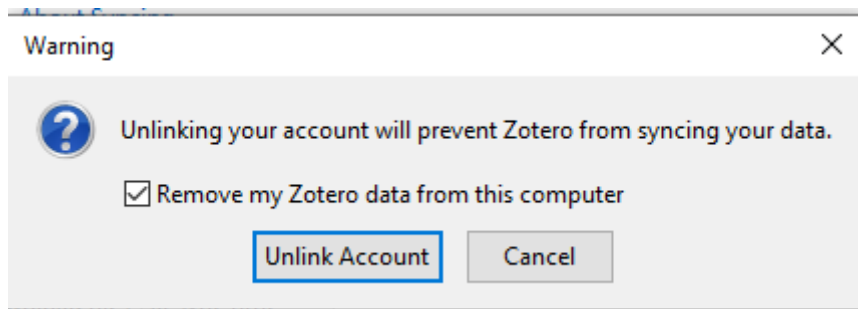
File syncing

This adjusts uploading pdfs:

- Sync attachment files in my Library...: if this is ticked, pdfs will be uploaded automatically. As you may have read at the section [Storage](#), pdfs use the available storage space. If you would like to save the storage space, do not send pdfs into the cloud, since they are stored also in your computer. But, if you used another computer, and you have collected new pdfs, upload them temporarily to the cloud so you could download them later to your own PC.
- Sync attachment files in Group Library: if you create a Group Library, all members will use your storage space. It is recommended to upload pdfs during the joint work to provide access to the full text for all members, then after finishing the project, delete them. This can be done in Zotero.org, after logging in under Settings/Storage, using *Purge Storage in my Library*-button. **Be careful: this deletes all uploaded pdfs, i.e. your personal pdfs as well if uploaded.** Before deleting, to make synchronisation inactive, untick File Syncing-option in Zotero.

Important: if you are using a machine that is used by others as well (e.g. a PC in the Library's reading hall), unlink your account after synchronisation and delete your documents from that machine:

- Settings - Sync - Unlink account
- Tick the box in front of "Remove my Zotero data from this computer."
- Unlink account



More information:

https://www.zotero.org/support/quick_start_guide