

Zotero Basics

A Guide



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Zotero

Zotero is a free, open source **Firefox** extension

To download the extension, go to <http://www.zotero.org/> and click on the red download button to download the latest version.

If you want to automatically create bibliographies and in-text citations and footnotes for your paper using Microsoft Word or OpenOffice or NeoOffice download the plug-in for Word or the extension for OpenOffice and NeoOffice at: <http://bit.ly/wordplugin> .

Once you have downloaded the extension and the plug-in you are ready to begin.

After you have installed Zotero:

Open Firefox

Zotero will appear as a pane at the bottom of the Firefox browser



You can click on the Zotero icon in Firefox to open and close Zotero and to resize the Zotero pane. You can also use the Toggle Tab button



to toggle between the full screen and the regular screen size.

To open Zotero on a computer in the library:

1. Click on the Windows icon
2. Select Departmentally Sponsored
3. Select Libraries
4. Select the Zotero icon and Zotero will automatically install



Building a list of References

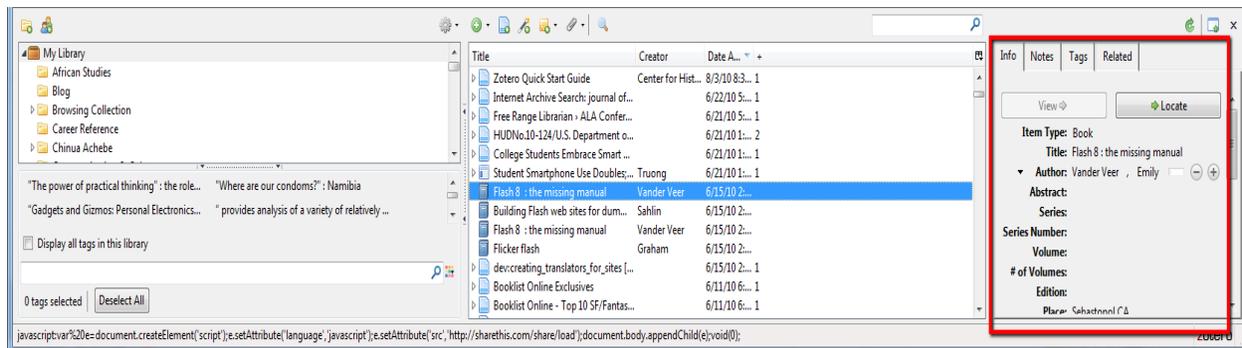
Entering references manually

- The green circle with a white cross is the new item button
- Click on it
- You will see a drop down menu of reference types
- Select the appropriate reference type

To enter a book, select book

In the right column you will see the citation fields necessary to create a new reference for your Zotero library.

Double click on a field to open it.



Enter:

Author: Eliot, Thomas Stearns

Title: Old Posum's book of practical cats

Place: New York

Publisher: Harcourt, Brace

Date: 1939

The reference saves automatically.

You may also copy and paste information into fields.

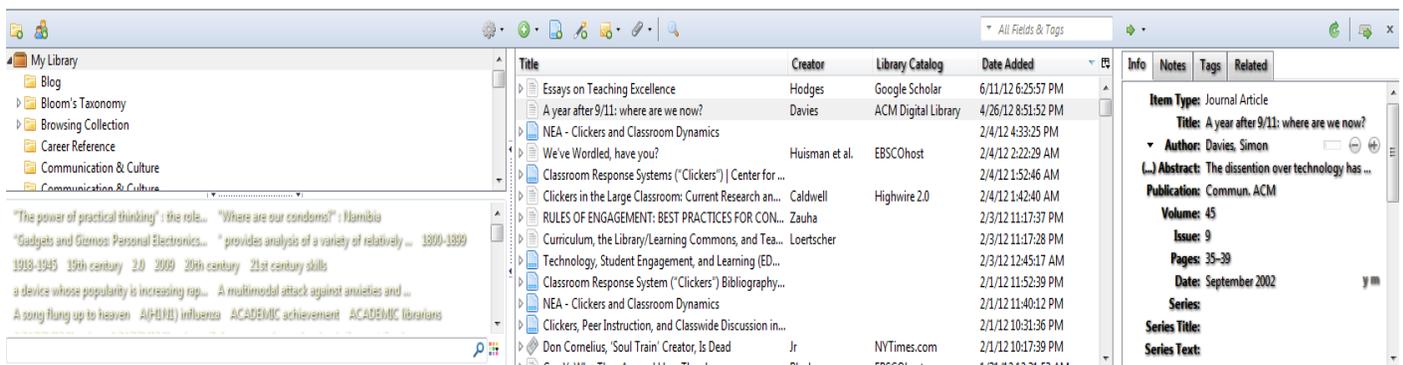
To make corrections or additions to a field, click on the citation in the middle column and the editable citation fields will appear again in the right column.

To remove references from a library, right-click, select the reference and choose **"remove selected item"**

Do **not** use **"delete selected item from library"** unless you wish to remove it completely (it will no longer be in **My library**)

References will post to **My Library** or to another **Collection** if one has been created and is open

My Library contains all the references collected. Other **collections** are folders you have created for similar references or specific projects or any other purpose that suits you. You may drag references from **My Library** into the collection folders.



Importing references

In your browser,

Open
Academic Search
And Search:

State of the union address

In the address box, you will see a yellow folder. If you mouse over it, it will say **"Save to Zotero"**.

results?sid=d3a2e432-e349-4b1e-88e6-d039a6494234%40sessionmgr4004&vid=2&hid=4208&bquery=state+"of"+the+unio 

Click on the folder and Zotero will ask which references you wish to save.

Select the items you wish to save and click OK

Items will import directly into **My library** and into a **collection** folder if you have selected one.

You can also import citations into Zotero after you have selected an individual record.

When you select an individual record, you will notice that the icon in the address bar changes to a document.

Click on the document icon in the address bar and the reference will automatically be saved into Zotero.

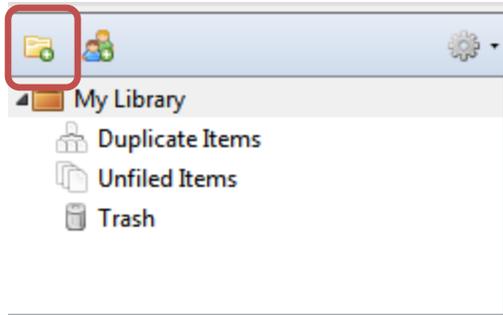
432-e349-4b1e-88e6-d039a6494234%40sessionmgr4004&hid=4208&bdata=JnNpdGU9ZWZWhvc3QtbG 

Collection Folders

To create a Collection Folder

- Right-click on My Library in the Collections pane
- Choose **new collection** from the pop-up window
- In the next pop-up window **name** the collection
- Click **OK**

You may also create sub-collections by clicking on the collection name, selecting new sub-collection, naming the sub-collection and clicking OK.



By right-clicking on a collection, you may also:

- Remove the collection
- Rename the collection
- Export the collection
- Create a bibliography
- Generate a report

Generate a report will generate a detailed list all the items in the collection



To add citations to a collection:

There are two ways to add citations to a collection in Zotero

Drag & Drop into the correct folder

Drag the item from the center column over to the new collection (in the left column)

Download directly to the folder

Open the collection that you want to add the citation, make sure it is highlighted
Search for the item using one of the IU Libraries' databases or go to a web site you would like to add to your library

Download the item to Zotero while the collection is open.

Note:

You are not able to move an item into a collection if the item is already in the collection.

Attachments:

You may embed attachments (text files, word documents, pdfs, images) in your Zotero references.

- Right-click on a reference in your library
- Select "Add Attachment"
- Under the **Add** drop down menu, select **Attach Stored Copy of File**



Output

Creating a bibliography

You may generate a bibliography from a **collection**

- Select a collection
- Right-click on the collection
- Select Create Bibliography from collection
- Choose the citation style you want in the pop-up window
- Select "Save as RTF"
- Click OK
- Select "Save" to save the file on your computer
- Open the saved file
- It will appear as a Word document

The bibliography will contain all the references in the collection you chose

You may also generate a bibliography from selected items in **My Library** or in a **collection**

- Select the items for the bibliography
- Right-click on mouse
- Choose create bibliography from selected items
- Select a citation style
- Select "Save as RTF"
- Click OK
- Select "Save" to save the file on your computer
- Open the saved file
- It will appear as a Word document

For example:

Eliot, Thomas Stearns. (1939). *Old Possum's book of practical cats*. New York: Harcourt, Brace.

Pain, S. (2000). My pet possum. *New Scientist*, 166(2236), 40. doi: Interview.

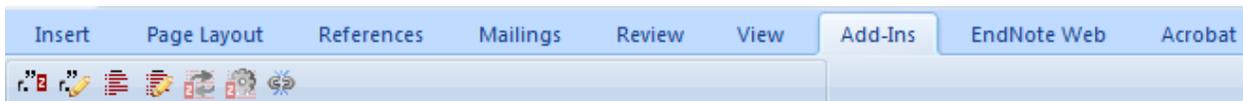
Piper, Peter. (2006). *Picking peppers*. New York: Knopf.

Schwartz, B. (1939). Mr. Eliot and Old Possum. *Nation*, 149(27), 737-738. doi: Article.



Automatic Bibliography

- Install the Zotero Word Add-In
- The add-in will appear under Add-Ins in Word's top toolbar



Functions:

You will see seven function icons
Zotero Bibliographic management:

- Zotero insert citation
- Zotero edit citation
- Zotero insert bibliography
- Zotero edit bibliography
- Zotero refresh
- Zotero doc prefs
- Zotero remove codes

Begin typing your paper, and when you reach a point when you wish to insert a

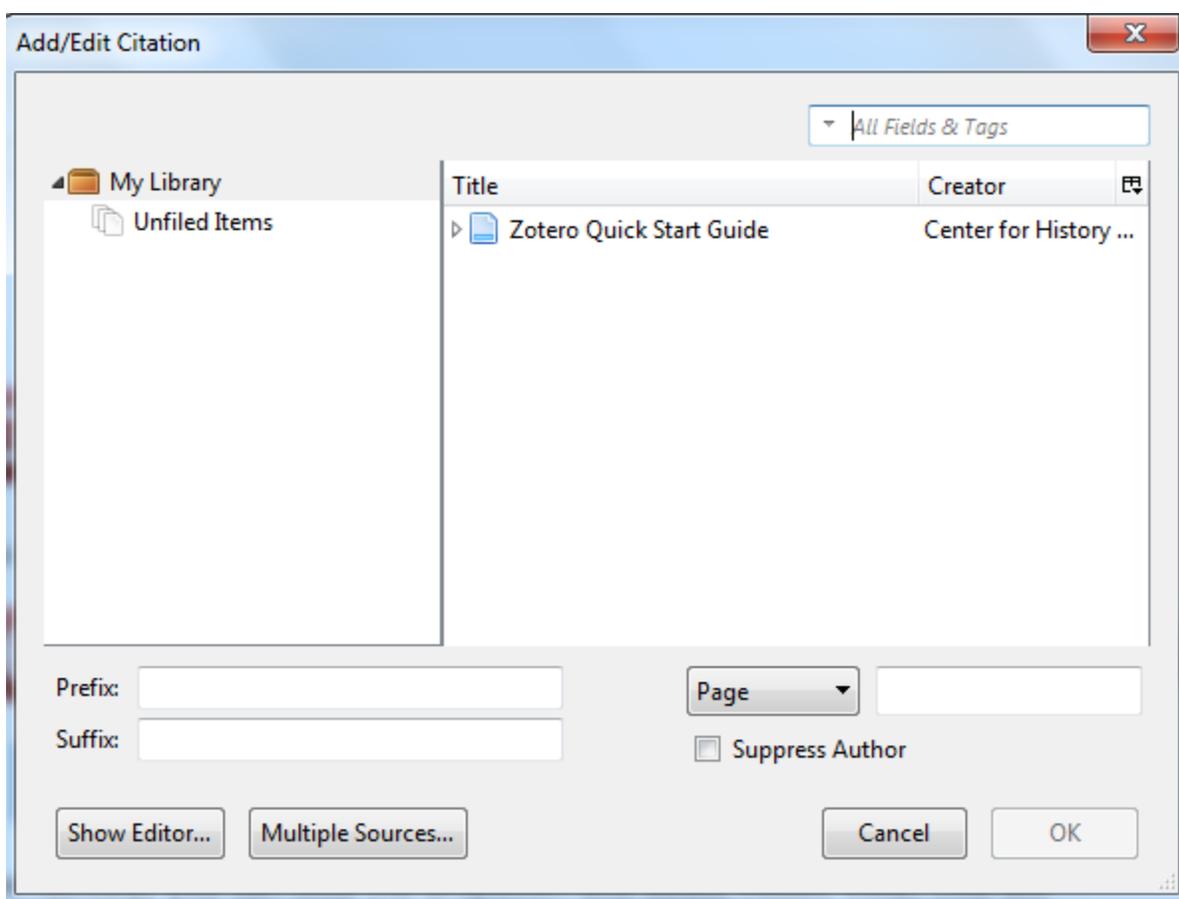
citation, use the **Zotero insert citation icon** . Type a keyword (author's name, term in the article, etc.) into the search box.



You will then see references that match the keyword you typed in your search.



Alternatively, you can click the dropdown and select classic view. This will open another screen and allow you to view your entire library. Select the item you wish to insert and click OK.



The in-text citation will appear in your paper.

Ex. My paper begins here ("ACM Snapshot," n.d.)

Use **Zotero Edit Citation** to:

- Select a different citation
- Add prefixes or suffixes to suppress an author's name
- Add addition citation information including page numbers, book chapter, figure verse.

- Highlight the reference and open Edit Citation.
- Add the information in the boxes at the bottom of the Zotero library window
- Press OK

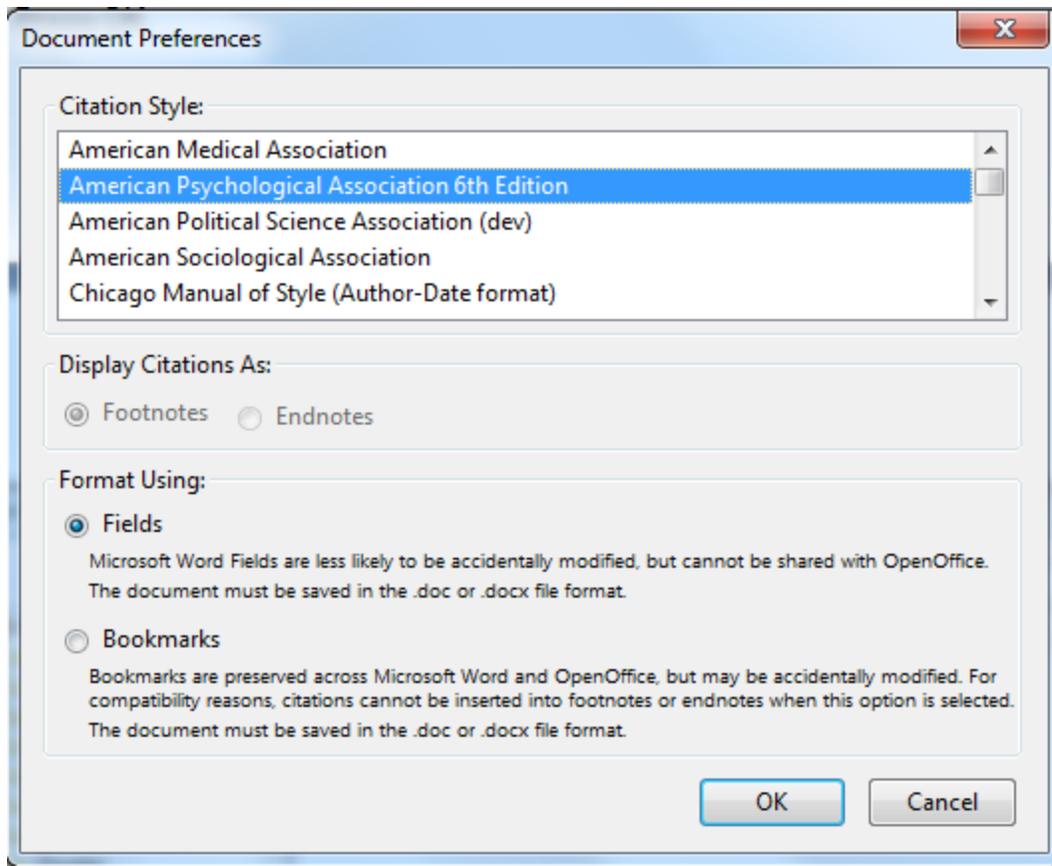
My paper begins here ("ACM Snapshot," n.d., p. 77)

To create the bibliography, use the **Zotero Insert bibliography** icon

The **Zotero Refresh** icon will refresh the Zotero references.

Set Doc Preferences allows you to set the style preference (APA, MLA, Chicago or others); you may also change the style after you have finished your document

There are a limited number of styles available in Zotero.



Zotero Remove Codes icon allows you to remove the link between Zotero and Word

A sequence for citing while you write and building a bibliography

Open your Zotero library

Open Word

On the Zotero Add-in tool bar

- Set Doc Preferences to select a style
- Click on Insert Bibliography
- Begin the paper
- Insert a citation

The bibliography will now appear below your text as you write.



Syncing Your Zotero Library

You can access items in your library on multiple computers by using the Zotero sync feature. A copy of the items in your library, notes, links, etc. is stored on the Zotero server and allows you to sync that data between different computers.

- Click on the icon that looks like a gear and select "Preferences".
- From the pop-window, select the "Sync" tab
- Select "Create Account", if you do not have a Zotero username and password.
- Click OK to close the window
- Click the green arrow  in the right corner of Zotero to Sync your library

Sync Files in Your Zotero Library

Data syncing will back up regular library items, it will not back up attachments. To backup your attachments you will need to use Zotero File Storage or your own existing WebDAV account to back up PDFs, videos, images, etc.

It is recommended that you use Zotero File Storage to back up your files if you are not familiar with WebDav. **To use Zotero File Storage you must have Zotero 2.0b7 or later installed on your computer.**

To Sync Files using Zotero File Storage:

- Click on the icon that looks like a gear and select "Preferences".
- From the pop-window, select the "Sync" tab
- Select "Create Account", if you do not have a Zotero username and password.
- Under File Syncing, make sure "Sync attachment files in My Library using" is checked.
- Select from the drop-down

****Zotero only provides 300MB of free file storage****

Pricing for storage is available at: <http://www.zotero.org/support/storage>

Zotero Groups

Groups allow you to share collections with others. To create a group:

- Click the New Group icon located next to the New Collection icon in the top left corner of the Zotero. 

OR

- Go to <http://www.zotero.org> and sign in to your account, click the Groups tab then select the "Create New Group" button in gray.

Group Roles

There are three roles for users in groups:

- regular members
- administrators
- group owners

Administrators have the ability to change a group's public/private status, members' roles and group library settings.

Group owners have all the same privileges as administrators, but can also delete the group or transfer ownership to another member.

Groups can be:

Private

- This page is only visible to group members and users invited to join the group
- Private groups are completely hidden from group searches. They are not shown on members' public profile pages and will not appear in search engine results.

Public, Closed Membership

- The group page is visible to the public but users can only join by invitation
- Administrators of the group can choose to show or hide an entire public library or individual collections from non-members.

Public, Open Membership

- The group page visible to the public, any user can join the group.
- Administrators of the group can choose to show or hide an entire public library or individual collections from non-members.

Export

You may export Zotero references

Zotero RDF – Exports as a Zotero Resource Description Framework document

RIS – Exports as a RIS tagged format text file

ReferBibIX – Exports as a ReferBibIX tagged format text file

Unqualified Dublin Core RDF – exports as a Dublin Core Resource Description Framework document

Wikipedia Citation Templates -

BibTex - bibTeX is a format for bibliographical references used in combination with the word processing system TeX/LaTeX

The **RIS** format allows you to export any notes you have taken (translator options) RIS is a common format for transferring references between databases, like EndNote and Zotero and other applications
RIS does not transfer attachments

Export references to EndNote from Zotero:

- Click on the gray gear icon  in Zotero
- Select export library
- From the pop-up window select "RIS" or "Refer/BibIX"
- A pop-up window will appear, prompting you to your Zotero library in a file.
****Remember where you saved the file****
- Open EndNote and select Import from the File Menu
- From the pop-up window, click on the "Choose File" button and select the file from your computer. **Make sure "Files of Type" is set to "all Files"**.
- Select "Reference Manager (RIS)" or "ReferBibIX" from the Import Option drop down
- Select your preferred option from the "Duplicates" drop-down menu. By default, a reference is considered a duplicate if the author, year, title and reference type match a reference already in the library.
- Select "Unicode (UTF-8)" from the "Text Translation" drop-down menu.



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