

Manage Your Research With **Zotero**

What's Zotero?

Zotero [zoh-TAIR-oh], Zotero.org, is a free, easy-to-use program for collecting, managing, and citing research sources. It includes web browser integration, one-click saving for many items, and group sharing.

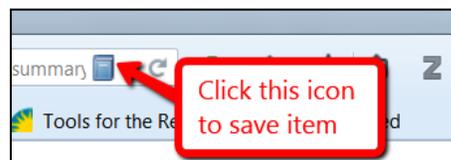
Getting Started

1. Go to www.zotero.org/download/ and click **Register** for a free account with 300 MB of storage space.
2. Click **Download** to install the Zotero desktop software. Available for Windows, macOS, and Linux.
3. Install the **Zotero Connector** for your preferred browser. Available for Chrome, Safari or Firefox.
4. Launch Zotero and **Sync** your Zotero account by going to Edit → Preferences → Sync. Enter your Zotero account, and click **Set Up Syncing**. Sync anytime by selecting the green circle icon in the top right. 

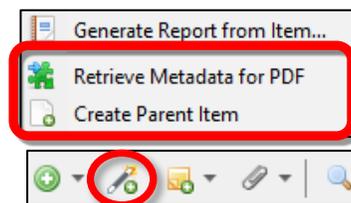
Note: With syncing, you also can access your Zotero library at Zotero.org. Third-party mobile apps are available; learn more at: www.zotero.org/support/mobile.

Saving and Organizing Items into Your Zotero Library

- **Via Web Browser:** The Zotero Connector monitors the webpages you view for items Zotero can save for you. When something is detected, a small icon will appear in the browser bar – a book icon when it senses a book to cite, a page icon for an article, a folder icon for a list of items (like in a database or catalog), etc.
 - **NOTE:** You can automatically capture article PDFs along with article citations. Go to Settings → Preferences → check the box by **Automatically Attach Associated PDFs**.



- **Via PDFs:** You can drag and drop previously saved PDFs into your Zotero Library. If the citation information does not show up, right click on the item and select **Retrieve Metadata for PDF**.
 - You can also search for the metadata by DOI number. Use the 'magic wand' icon in Zotero and paste in the DOI:
 - If that doesn't work, right-click on the item entry, then click on **Create Parent Item**, and fill in the pertinent details manually.



- **Manual Entry:** Use the new item icon, green plus sign to manually enter items. Be sure to choose the appropriate material type, then fill in the pertinent citation details. You can add an attachment, such as a PDF, by clicking the paperclip "Add Attachment" icon.



- It is possible to manage the items in your Zotero library using collections and subcollections, tagging, notes and other tools. You can search your folders/collections by keywords, author names, titles, etc. using the **search box**. Where possible, this will also search the full-text of PDFs/documents and notes saved in your Zotero library.
- **NOTE: ALWAYS double-check your citations** to be sure it captured all pertinent details like title, author, journal, etc. Some clean-up work may be needed to ensure correct citing in your own papers.

Collaborating via Public & Private Groups

Zotero lets you create as many public or private groups for collaboration as you wish, under the Groups tab or at www.zotero.org/groups. Both public and private groups can have online discussions via this page.

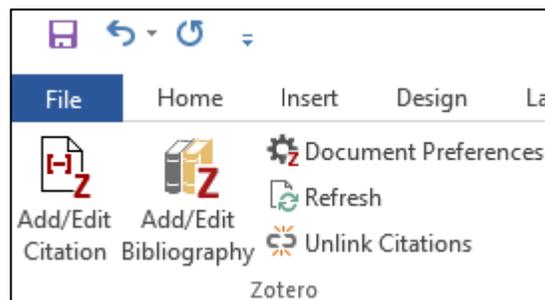
- **Private groups'** libraries will be visible and editable for group members only.
- **Public groups** can have either open or closed membership. Open group libraries will be visible and editable for the public. Closed group libraries can be visible to the public, but edited only by members.
- You can share items from your personal Zotero library with a group library.
 - The easiest way to do this is to drag and drop an item from your library to the group library when using the Zotero desktop application (this does not work when logged in at Zotero.org).
 - PDFs added to a group library will use the group owner's Zotero storage space.
 - Only private groups OR public groups with closed memberships can share full-text documents and PDFs



Citing While You're Writing

During the Zotero software download, plugins for Word and LibreOffice were added to these programs. In Word, a new "Zotero" tab will appear next to the "View" tab. You might need to restart the program for them to show up. If you still have problems see: https://www.zotero.org/support/word_processor_plugin_installation

- First, go to the **Document Preferences** window, where you can choose a citation style (additional styles can be downloaded at www.zotero.org/styles).
- Place the cursor in your Word document where you want to add a citation and click the **Add/Edit Citation** button. A Zotero search bar will appear where you can enter keywords, author name, etc. to find an item in your library. Choose the item, hit enter, and a properly formatted citation will be added to your paper.
 - If you need to add page numbers, click the arrow by the Z in the Zotero search bar and choose **Classic View**. This will open a window displaying your Zotero library, including a box to fill in the page number and a button to add multiple sources.
- Click the **Add/Edit Bibliography** button to create a properly formatted bibliography for all the citations in your paper. It will automatically update as you add more citations.



More Information

- Zotero Quick Start Guide: https://www.zotero.org/support/quick_start_guide
- Zotero video tutorials: https://www.zotero.org/support/screencast_tutorials
- Need a quick and easy way to create a bibliography? Try **ZoteroBib** (zbib.org) helps you build a bibliography instantly from any computer or device, without creating an account or installing any software.
- Smithsonian Libraries' How Do I...Manage Citations & Bibliographies: <https://library.si.edu/research/create-manage-citationsbibliographies> (includes a link to this handout)
- Still have questions? Contact Ask-a-Librarian by email at AskALibrarian@si.edu.

