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# Getting Started with Zotero!

FREE Reference Management Software

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## The BASICS

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Created by UMass Amherst Biochem and Molecular Biology Students

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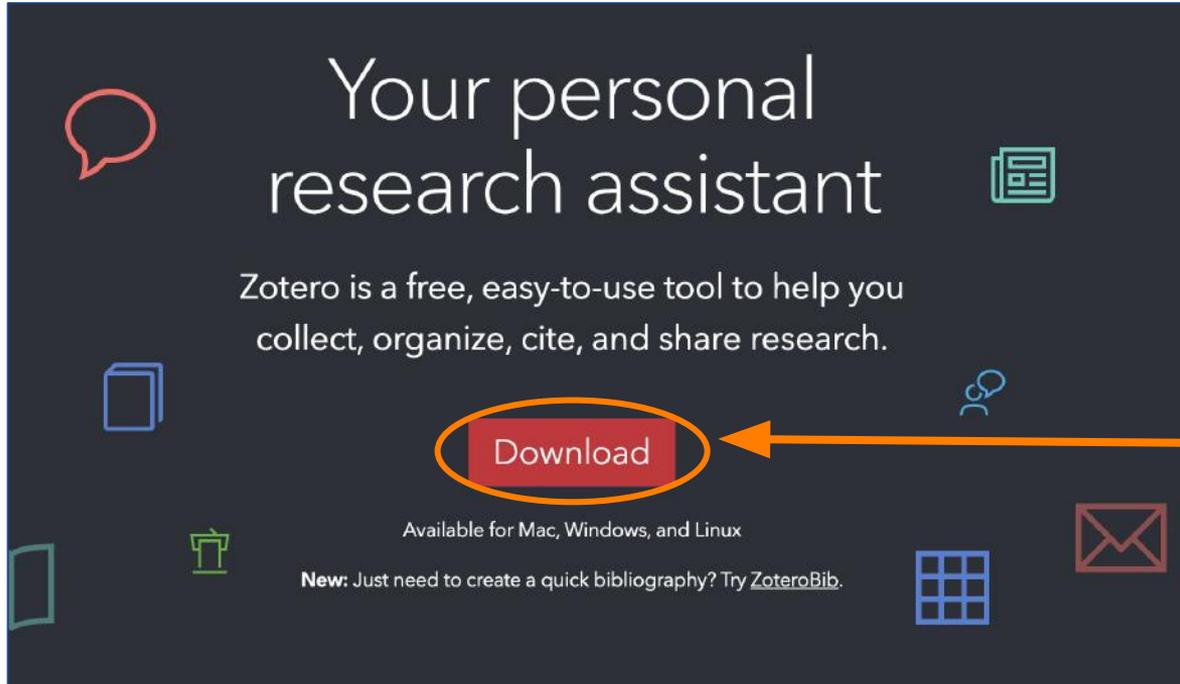
# First of all, Why Zotero?

- **Free** and easy tool to help you collect, organize and share references for your research and writing papers in a personalized database!
- Keeps all your sources organized in folders!
- Connects to web browsers - detects content as you search the web, and saves to your Zotero database with one click!
- “Cite while you write” with Google Docs, Microsoft Word, and Libre Office!
- Creates formatted bibliographies automatically!

# Downloading Zotero

(~5 mins)

# Downloading Zotero



## STEP 1:

Navigate to:

<https://www.zotero.org/>

## STEP 2:

**Click Here on  
Website to start !!**

**FOR MORE ON DOWNLOADING + INSTALLING VISIT:** <https://youtu.be/tcreauMno6l> (~3 min)

# Downloading Specifics

- **Download Zotero 5.0 for Windows or Mac**
  - **IMPORTANT** - Also download **Zotero Connector** for your browser of choice
- Register for a free zotero.org account

For Google Chrome



The screenshot shows two columns. The left column features the Zotero logo (a red 'Z' in a hexagon) and the text 'Zotero 5.0 for Mac' with the subtitle 'Your personal research assistant'. Below this is a blue 'Download' button. At the bottom, it lists 'Other platforms: Windows · Linux 32-bit · Linux 64-bit' and a link 'Looking for Zotero 4.0?'. The right column features the Chrome logo and the Zotero logo with a plus sign, and the text 'Zotero Connector' with the subtitle 'Save to Zotero from your browser'. Below this is a blue 'Install Chrome Connector' button. At the bottom, it says 'Zotero Connectors automatically sense content as you browse the web and allow you to save it to Zotero with a single click.' and 'Zotero Connectors for other browsers'.

For Safari



The screenshot shows two columns. The left column features the Zotero logo (a red 'Z' in a hexagon) and the text 'Zotero 5.0 for Mac' with the subtitle 'Your personal research assistant'. Below this is a blue 'Download' button. At the bottom, it lists 'Other platforms: Windows · Linux 32-bit · Linux 64-bit' and a link 'Looking for Zotero 4.0?'. The right column features the Safari logo and the Zotero logo with a plus sign, and the text 'Zotero Connector' with the subtitle 'Save to Zotero from your browser'. Below this is a blue 'Install Safari Connector' button. At the bottom, it says 'Zotero Connectors automatically sense content as you browse the web and allow you to save it to Zotero with a single click.' and 'Need help installing the Connector?' and 'Zotero Connectors for other browsers'.

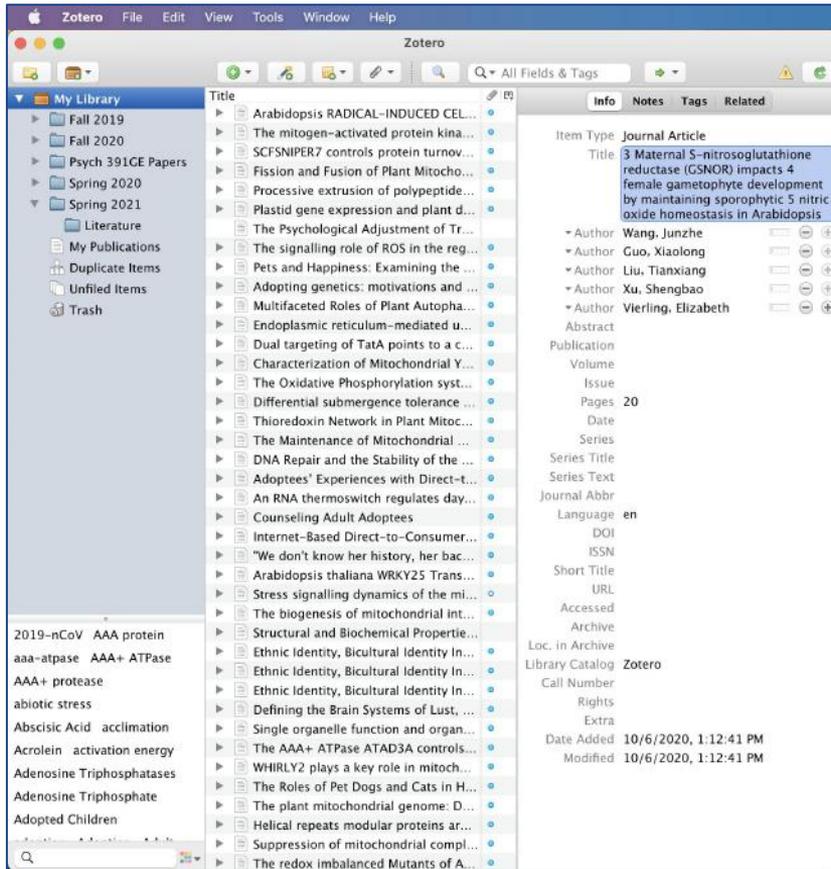
For Firefox  
Install connector after program



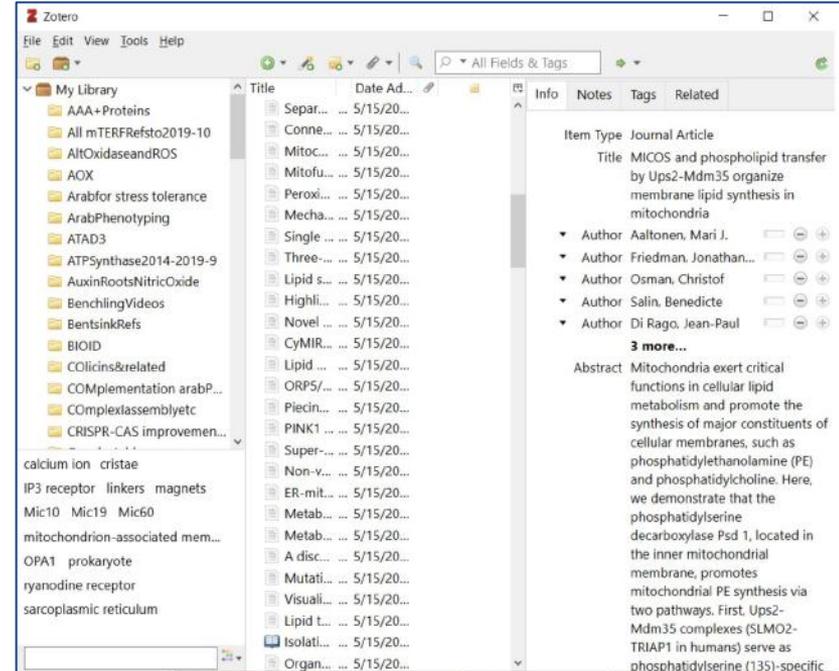
The screenshot shows the Firefox logo and the Zotero logo with a plus sign. Below this is the text '1. Install the Zotero Connector for Firefox' and 'Zotero Connectors allow you to save to Zotero directly from your web browser.' At the bottom is a blue 'Install' button.

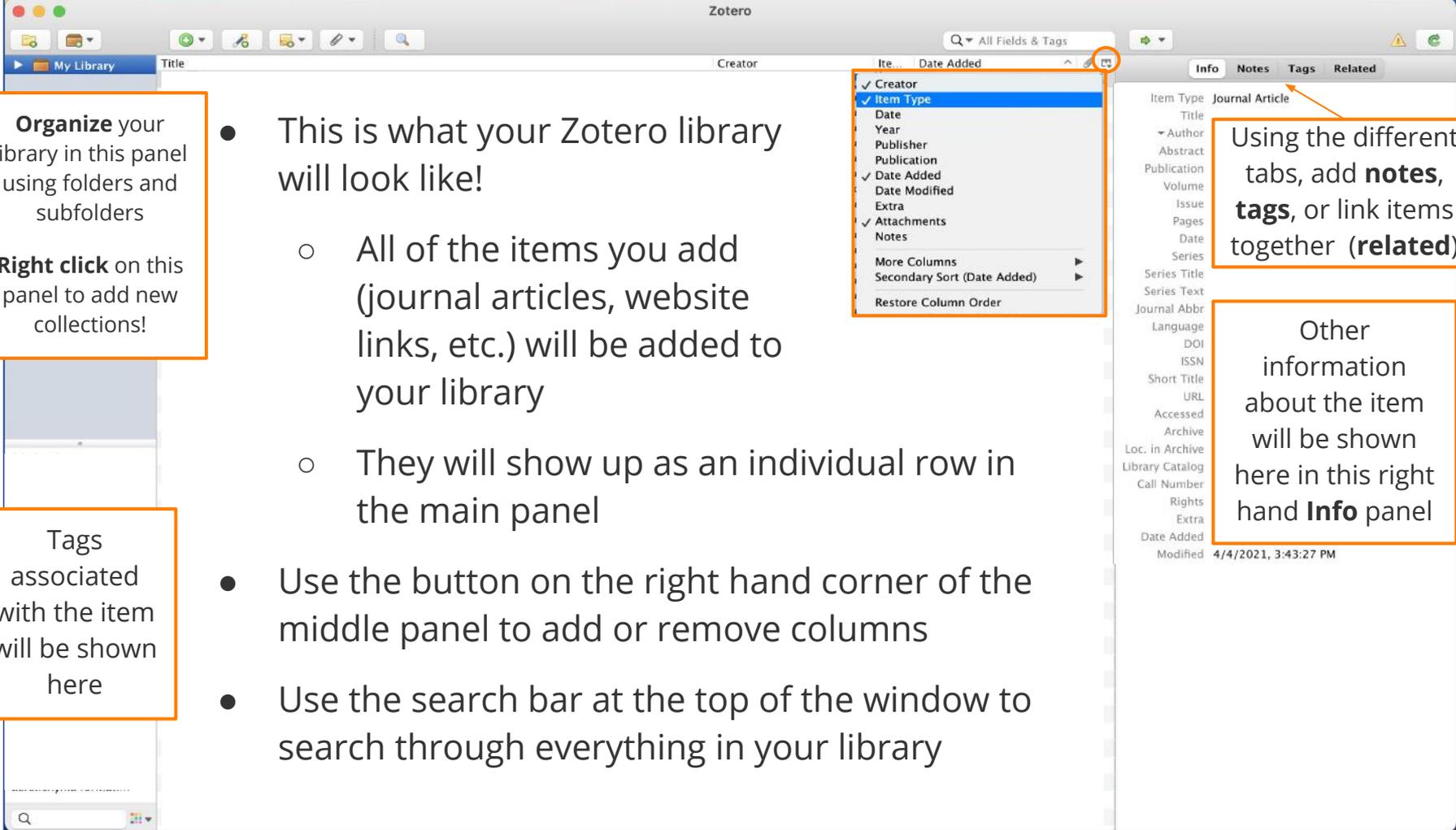
# Here's what it looks like on Mac vs. PC

Mac:



PC:





**Organize** your library in this panel using folders and subfolders

**Right click** on this panel to add new collections!

Tags associated with the item will be shown here

- This is what your Zotero library will look like!
  - All of the items you add (journal articles, website links, etc.) will be added to your library
  - They will show up as an individual row in the main panel
- Use the button on the right hand corner of the middle panel to add or remove columns
- Use the search bar at the top of the window to search through everything in your library

Using the different tabs, add **notes**, **tags**, or link items together (**related**)

Other information about the item will be shown here in this right hand **Info** panel

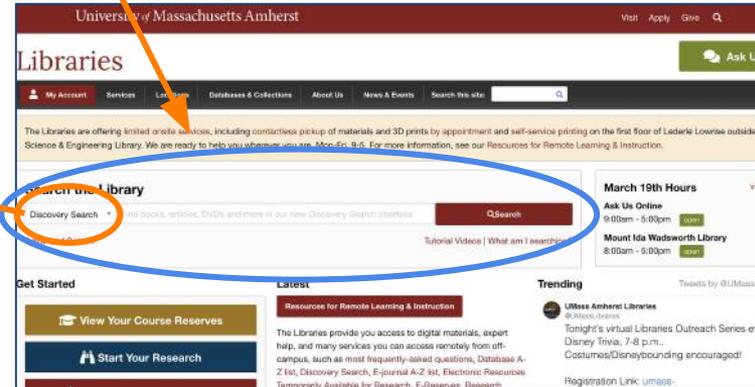
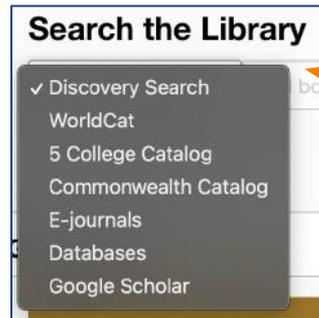
# **Adding to your Library**

# Where to Find Literature on the Web

Here is a list of databases that are useful when starting your research:

- PubMed - <https://pubmed.ncbi.nlm.nih.gov/>
- UMass Library Database - <https://www.library.umass.edu/>
- Web of Science - <http://www.webofknowledge.com/>

Choose from any of these -

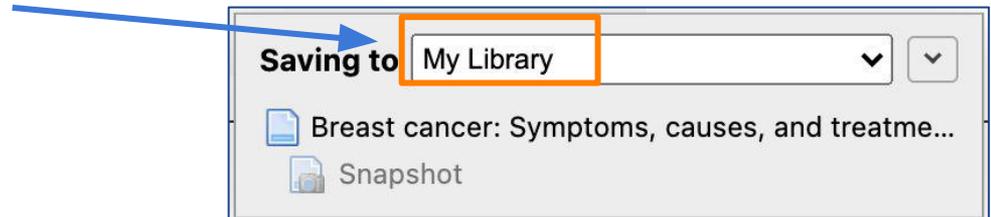


# Adding to your Library from the Web

- In your browser, search for an article (ex. Search in Database from previous slide)
- Click the Zotero icon at the top of your browser to save a citation from that page (It will look different depending on how many articles there are in your list)

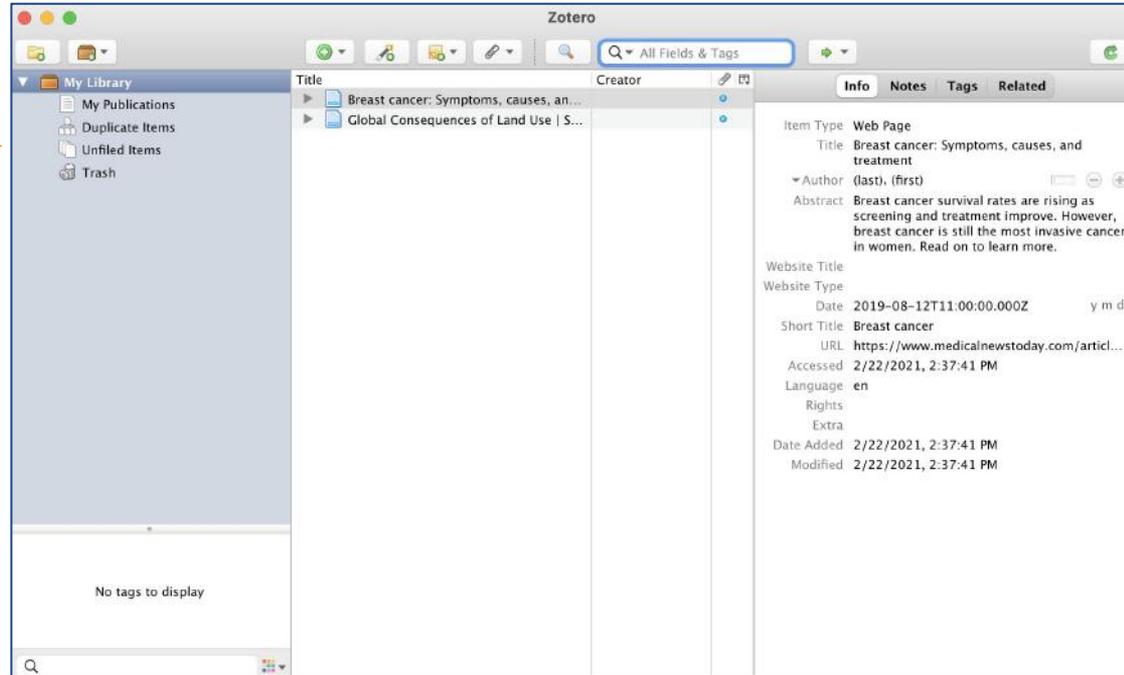


- A pop-up window will appear on the upper right of the screen and will indicate where your citations are being saved in your Zotero library



**MORE ON SAVING REFERENCES TO YOUR LIBRARY:** <https://youtu.be/d9fkwoITfbM> (~3 min)

Here's what it will look like when it is directly sent to your Zotero →



# Adding to your Library cont'd...

- If you are in a database, search your topic, and you can select as many of the search results as you want



Select which items you'd like to add to your library:

- Bee venom reduces burn-induced pain via the suppression of peripheral and central substance P expression in mice
- Gamma-aminobutyric acid regulates glucose homeostasis and enhances the hepatopancreas health of juvenile Chinese mitten crab (*Eriocheir sinensis*) under fasting
- Cloning and characterisation of NMDA receptors in the Pacific oyster, *Crassostrea gigas* (Thunberg, 1793) in relation to metamorphosis and catecholamine synthesis
- Ameliorative effects of escin on neuropathic pain induced by chronic constriction injury of sciatic nerve
- AmAMP1 from *Acropora millepora* and damicornin define a family of coral-specific antimicrobial peptides related to the Shk toxins of sea anemones
- Small Intestinal Ganglioneuromatosis Accompanied by an Ulcer in a 13-Year Old Dog
- Preliminary Anatomical Assessment of the Eye of the African Giant Rat (*Cricetomys gambianus*)
- Síndrome glaucomatosa em Chihuahua: da hipertensão ocular ao glaucoma
- The Basal Ganglia IX
- The Basal Ganglia VIII
- New approaches to studying morphological details of intramolluscan stages of *Angiostrongylus vasorum*

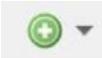
- IMPORTANT: if you are adding a source with a video or image, you may need to hand cite some of the info, but any added source can be edited in your library

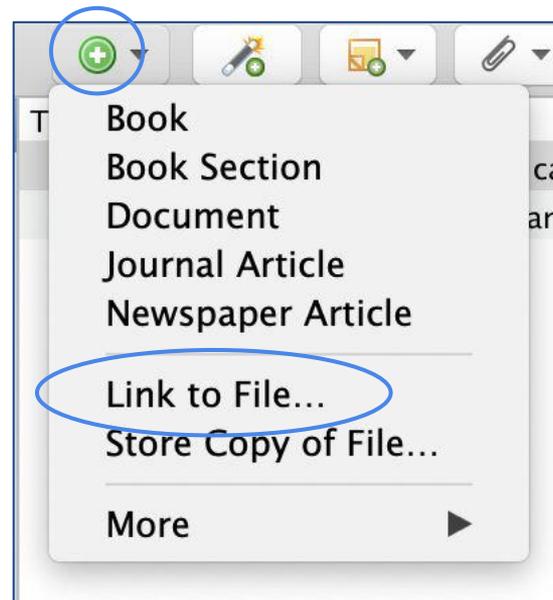
# Adding to your Library cont'd...

If you have an existing item that you want to add to your library:

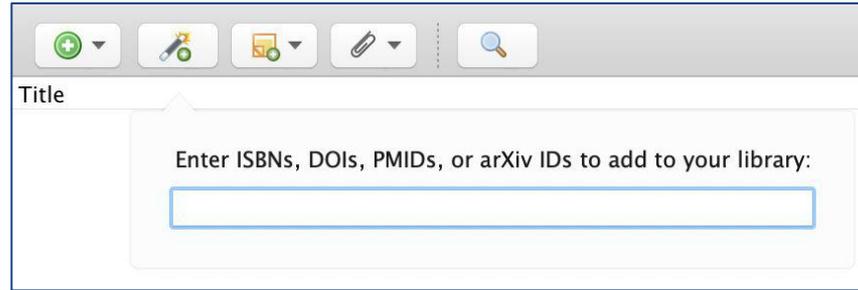
- **Click & Drag** the PDFs from your computer library directly into your Zotero library
  - Zotero auto-fills the metadata (citation information) it recognizes

Or:

- Click the new item button (  ) and choose the type of item you want to add
- Click Link to File...
- Select the item you want to add



# Adding by ISBN, DOI, PMID, arXiv

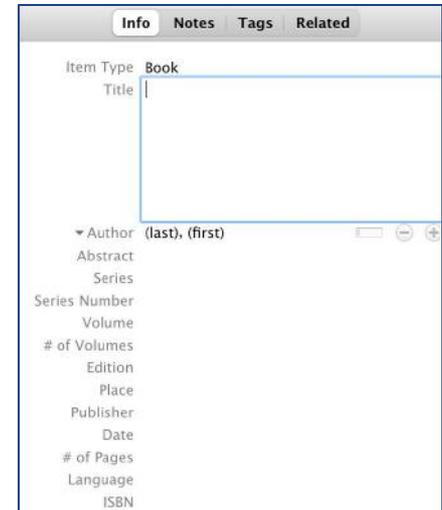
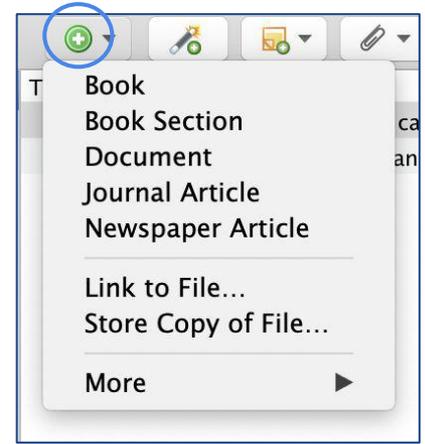


Easily add a number of ID number from top search bar-

- [ISBN](#) - International Standard Book Number
- [DOI](#) - Digital Object Identifier
- [PMID](#)- PubMed Identifier (add straight from PubMed database)
- [arXiv](#) - Archive for scholarly articles

# Manually Adding References to Your Library

- Highlight the folder in your Zotero library that you want to add the reference to
- Click the new item button (  ) and choose the type of item you want to add
- Type in each field necessary for your citation
- Edit citations by clicking on a field



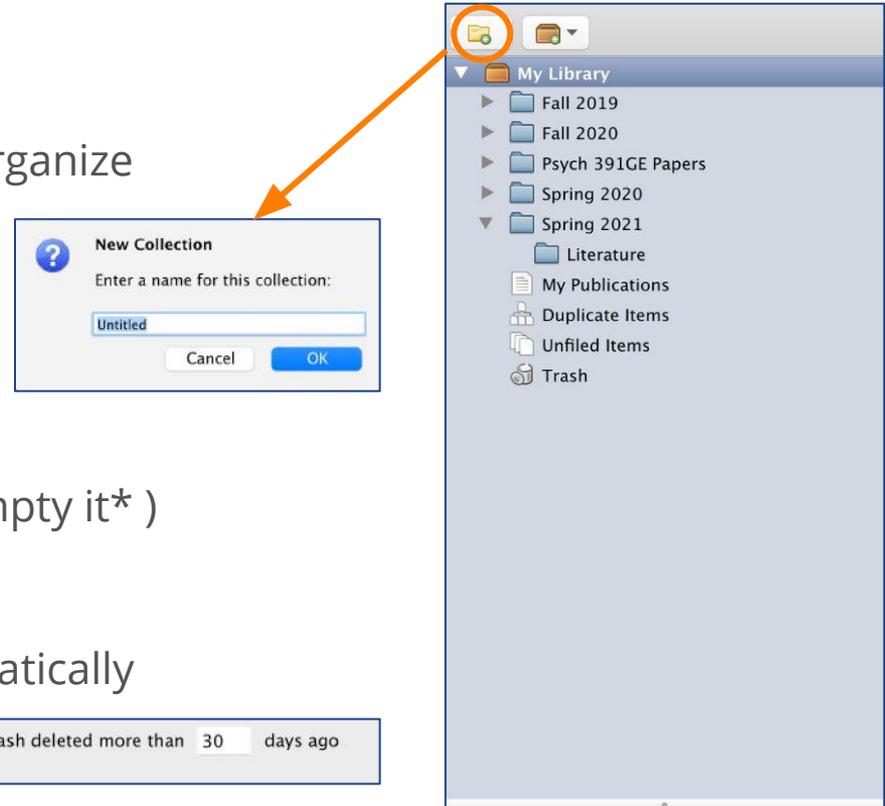
# Organizing Your Library

- Create and edit collections (folders) to organize your work
- To move an item to Trash, right click, and choose "Move Item to Trash" - or highlight and click delete on keyboard

(\*Items stay in the "Trash" folder until you empty it\*)

- → can change when items will be automatically deleted in Preferences :

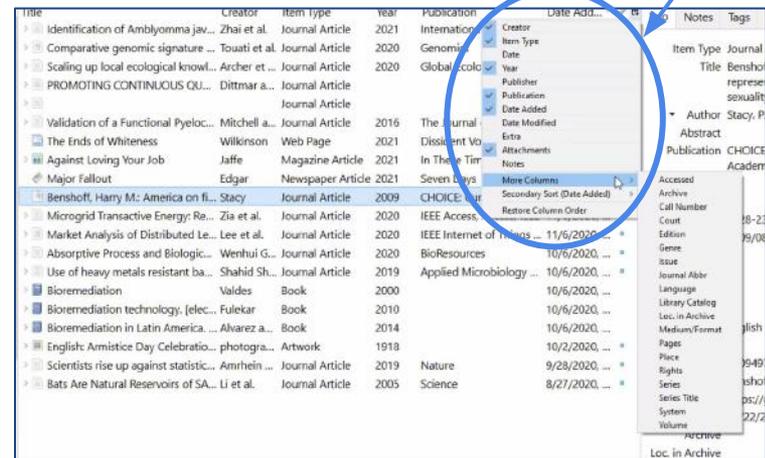
Automatically remove items in the trash deleted more than 30 days ago



# Building and Organizing your Zotero Library

Tabs you will see in your Zotero Library:

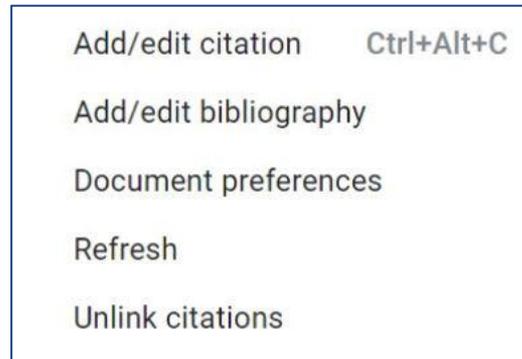
- **Unfiled items** - items you have not put into a sub collection
- **Duplicate items** - items that you have downloaded more than once (can see when viewed and differences of duplicates so you can decide which you want to be “item of record”)
- Specify what you want in middle columns from the dropdown menu



# Citing and Creating Bibliographies

# Add Zotero to Word & Google Docs!

Never hand-enter reference citations again!



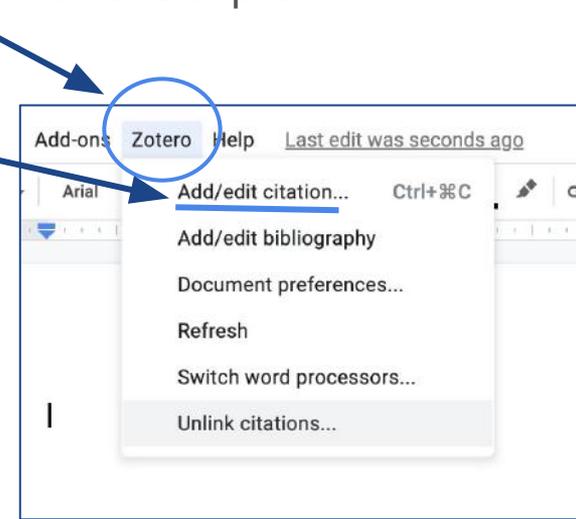
**GOOGLE DOCS**



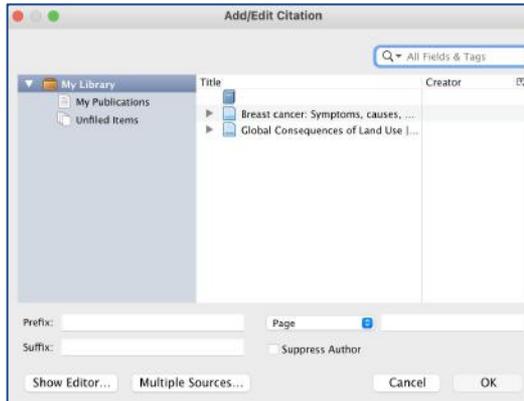
**MICROSOFT WORD**

# How to Cite While You Write - GOOGLE DOCS

- To add a citation from Zotero into your work, click “Zotero” at the top of the Google Doc
- From the dropdown menu choose “Add/Edit Citation”
- Pick citation you want from dropdown menu
- Easily look up articles in your library HERE:



- Or, open in your library →

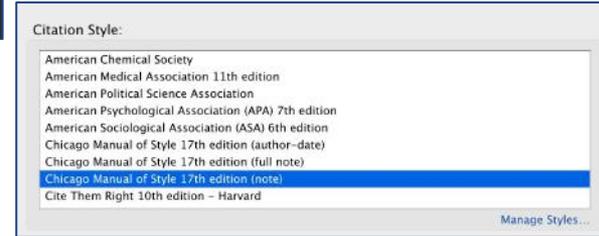
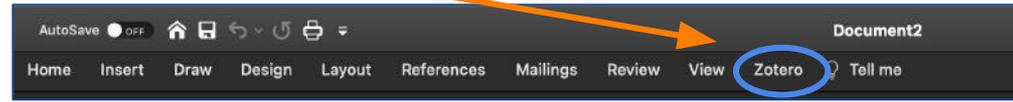


FOR MORE VISIT:

[https://youtu.be/E5\\_xjfm57wU](https://youtu.be/E5_xjfm57wU) (~4min)

# How to Cite While You Write- MICROSOFT WORD

- Click on the Zotero tab on the top bar
- Choose from drop down menu- "Add/Edit Citation"
- Choose citation style
- Easily look up articles in your library HERE:



OR open in classic view in your library →



FOR MORE VISIT:

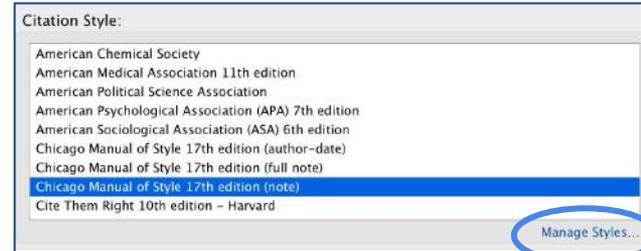
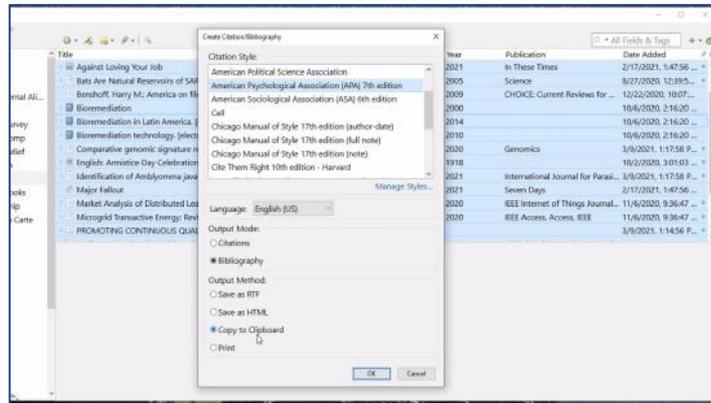
[https://youtu.be/E5\\_xjfm57wU](https://youtu.be/E5_xjfm57wU)  
(~4min)

\* ALSO COMPATIBLE WITH  
LIBRE OFFICE!!



# Creating Bibliographies from your Zotero Library

- Select references or collections to include in your bibliography → hold control to select multiple references
- Right click selection and choose “Create Bibliography”
- Choose bibliographical style you want
- Click “Copy to Clipboard” and press OK
- Paste wherever you like (ex. Google Docs or Word)



\*click “manage styles” for more style options

**FOR MORE ON CREATING CITATIONS VISIT:**  
<https://youtu.be/Wcla7iFXnLs> (~7 min)

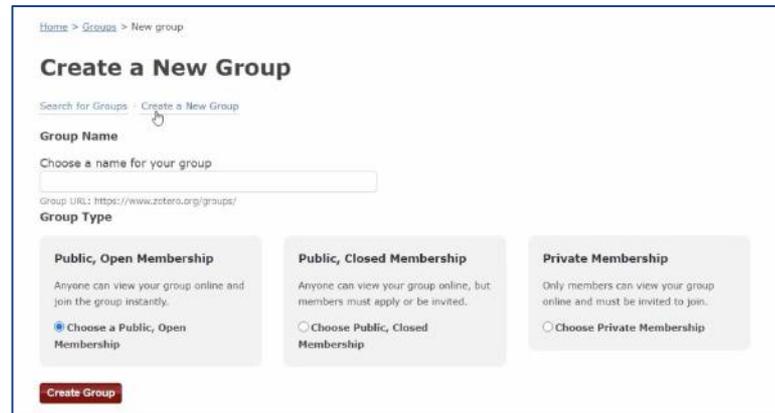
# Creating a Bibliography while Writing

- While typing a paper with in-text citations from your Zotero library, you can easily create a bibliography
- Put cursor at end of paper
- Click “Add/Edit Bibliography”
- Change to APA (7th) citation to order alphabetically
- \*Make sure to ensure all information you are looking for is included in the citations- you should **NOT** try to edit this directly, go to your Zotero library and change the entry for that citation or you will get an *ERROR*
- To make sure someone else can open - save as PDF or unlink citations

# Collaborating with Zotero

# Group Libraries

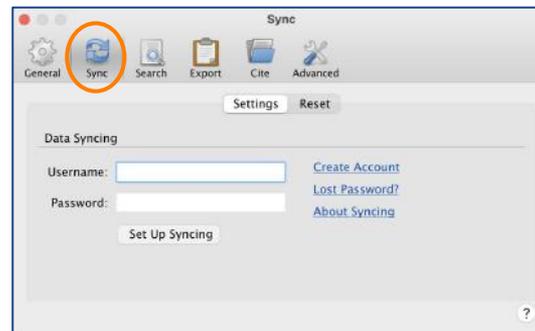
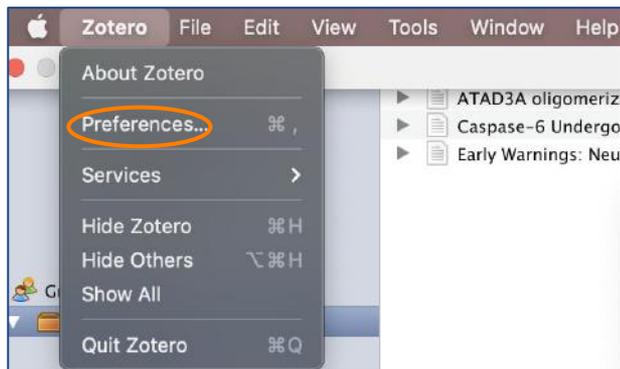
- Share with your colleagues or peers!
- First, make sure syncing is turned on (see next slide)
- In library, go to groups, click “Create a New Group”
- Can make group public, public viewable, or private (best for students)
- Add people through email, even if they don’t have Zotero (they can sign up after being invited)
- As owner of group, sharing PDFs will only eat into **your** data max



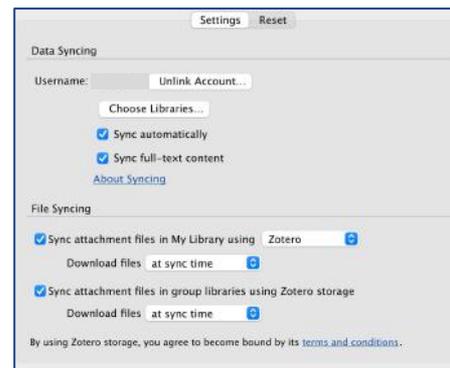
The screenshot shows the 'Create a New Group' page in Zotero. At the top, there is a breadcrumb trail: 'Home > Groups > New group'. The main heading is 'Create a New Group'. Below this, there are two links: 'Search for Groups' and 'Create a New Group', with a mouse cursor hovering over the latter. The 'Group Name' section has a text input field with the placeholder text 'Choose a name for your group'. Below the input field, the 'Group URL' is shown as 'https://www.zotero.org/groups/'. The 'Group Type' section contains three radio button options: 'Public, Open Membership' (which is selected), 'Public, Closed Membership', and 'Private Membership'. Each option has a brief description of its membership rules. At the bottom of the form is a red 'Create Group' button.

# Group Libraries- Ensuring Syncing is On

- To make sure syncing is turned on to collaboratively work in group libraries, go to Zotero Preferences
- Click on Sync and log into browser account



- Set your preferences  
\*tip: to save space unclick "sync full-text context"



# Group Libraries Settings

[Home](#) > [Groups](#) > [Group Name](#) > Settings

## Group Name: Settings

[Group Settings](#) · [Members Settings](#) · [Library Settings](#)

### Group Information

Group Name

Description

**B** *I* U ~~S~~  $x_2$   $x^2$  **A** **A** *I* **“** **”** [Link](#)

Paragraph     

What is this group about?

Disciplines

- Mathematics
- Molecular Biophysics and Biochemistry**
- Neuroscience
- Physics

Hold the Control key (Windows/Linux) or Command key (Mac) to select more than one discipline.

Group URL

Is there a webpage about this group?

Enable Comments

**Save Settings**

Profile Image



**Choose Image**

### Owner Options

As the owner of this group, you can delete it.

**Delete Group**

[Home](#) > [Groups](#) > ["Group Name"](#) > Settings

## "Group Name" Settings

[Group Settings](#) · [Members Settings](#) · [Library Settings](#)

### Group Type

Private

Public Closed

Public Open  
Controls who can see and join your group.

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### Library Reading

Anyone on the internet

Any group member  
Who can see items in this group's library?

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### Library Editing

Any group members

Only group admins  
Who can add, edit, and remove items from this group's library?

---

### File Editing

Any group members

Only group admins

No group file storage  
Who can work with files stored in the group? Public Open groups cannot have file storage enabled.

**Save Settings**

## Note:

- It is best to collaborate on documents with Zotero citations using **Google Docs**
- Moving documents with Zotero citation links between word processors is possible but challenging!
  - You risk losing links between citations and bibliography if done incorrectly
- Guide to moving documents between word processors:
  - [zotero.org/support/kb/moving\\_documents\\_between\\_word\\_processors](https://www.zotero.org/support/kb/moving_documents_between_word_processors)

# Additional Zotero Features

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# Data Storage on Free Account

- Zotero gives a maximum of 300MB of file storage for free to all users
- If you want to exceed this, more storage *can* be bought
- However, to minimize storage use (helpful for students), you can choose to either save the entire pdf (uses up more storage) **or instead** save just the source (less storage space)  
→ to do so, go to Preferences and in General, unclick :  Automatically attach associated PDFs and other files when saving items

Storage Limit	Cost (USD)
300 MB	Free
2 GB	\$20/year (equal to \$1.67 per month)
6 GB	\$60/year (equal to \$5 per month)
Unlimited	\$120/year (equal to \$10 per month)

- Sync to email if you want access on other devices



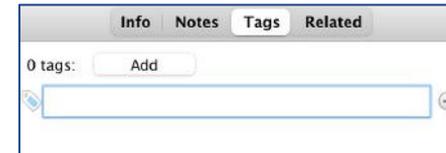
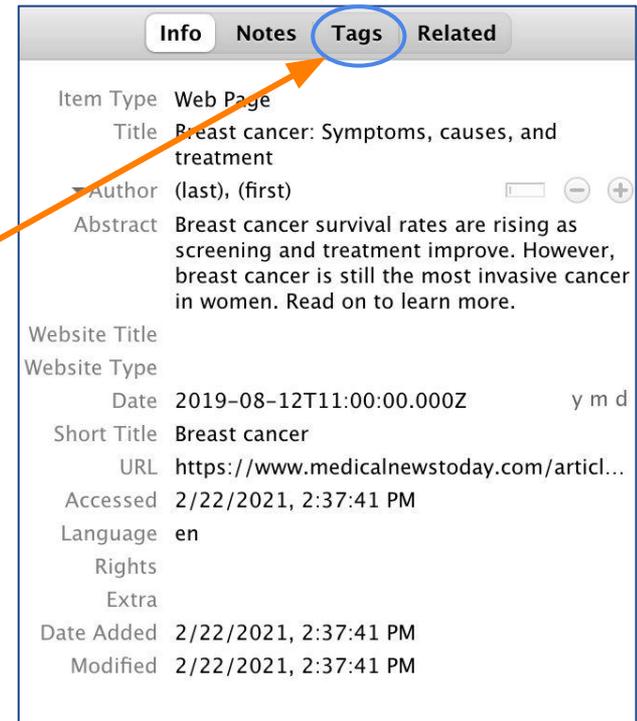
- **\*FOR STUDENTS:** Remember to link your Zotero to an email you will have access to after graduation if you start with school email !!!

# How to Add Tags

- Tags help further organize and sort your papers

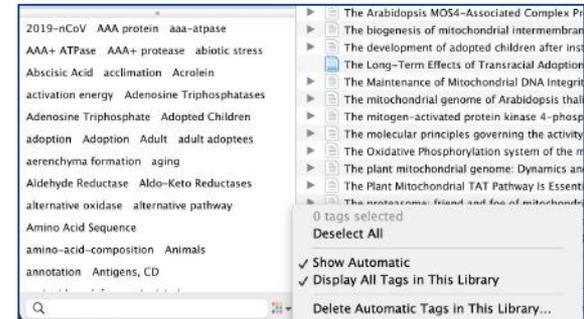
## CREATING A TAG:

- Click on a the item in your library you want to create a tag for
- On the right hand side, a column called “Tags” will appear
- In the Tags tab click “Add” to add a tag, and then type what you would like to call the tag into the box below
  - Tags can be include topics, methods, status, ratings, etc.



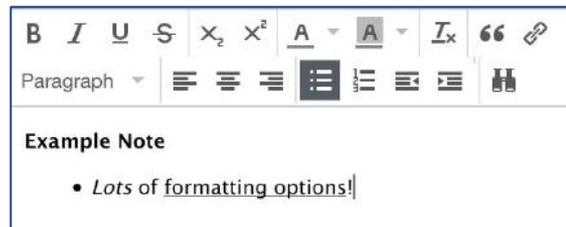
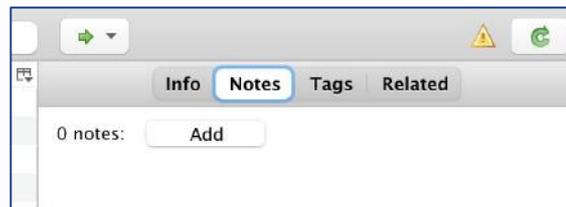
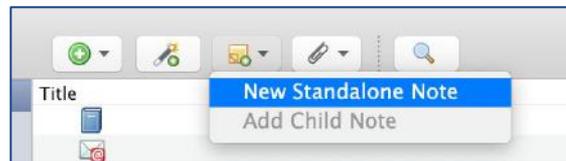
# Using Tags

- There are no limits to the number of tags an item can have
- Once a tag is made, they are easily searchable using the search bar at the top of your library
- You can also filter your library or a collection to show a set of one or more tags using the tag selector on the bottom left of Zotero
- Clicking a tag will show all of the items with this tag in the selected collection



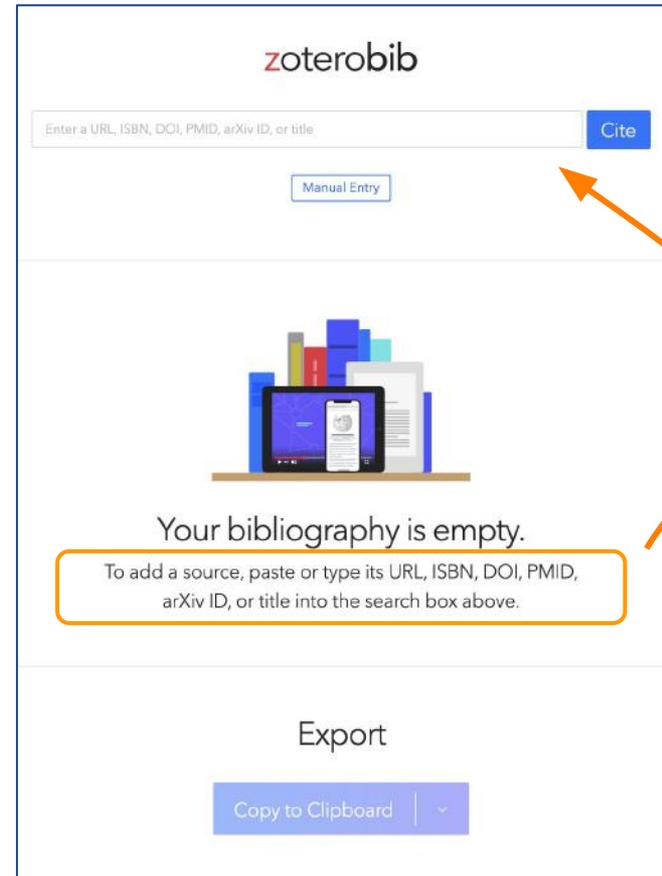
# Note Taking

- **Note-taking**
  - Types of notes:
    - Standalone (its own item)
    - Child Note (added to another item)
  - Searchable and easily editable
  - Text saves as you type
  - Can also be tagged or related to other items



# ZoteroBib → <https://zbib.org>

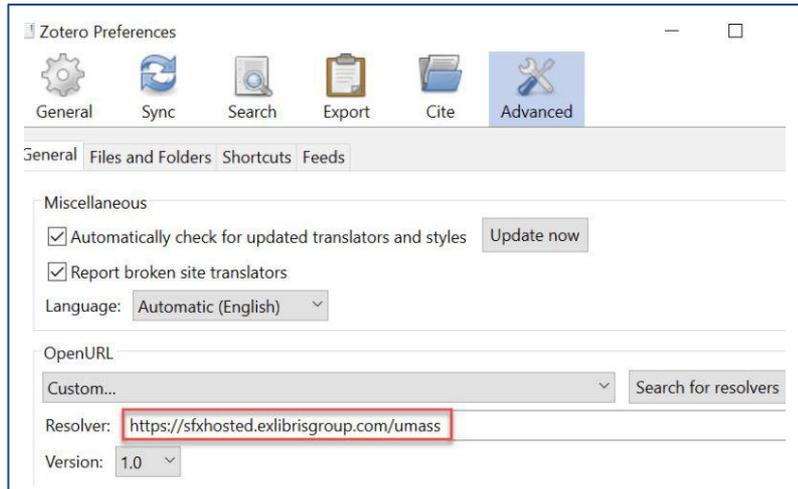
- Free and easy way to build a bibliography instantly without an account or software installation
- Bibliography is stored in browser's local storage
- Over 9,000 citation styles
- Can create a link to the bibliography version to open on another browser or share



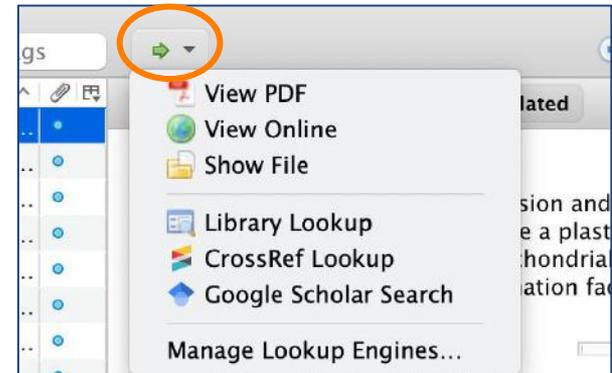
**ZOTEROBIB FAQ:** <https://zbib.org/faq>

# OFF CAMPUS TIP

- Set the UMass Libraries as your favorite library: click "Edit or Zotero," "Preferences," then in "Advanced," enter "<https://sfxhosted.exlibrisgroup.com/umass>" as resolver, version 1.0



This will allow you to find full text versions of items in your library by clicking the green Locate button!



# Questions/Comments?

Fill out our **Google Form** to provide feedback:  
[forms.gle/Fpsea6ftiknFXSeJA](https://forms.gle/Fpsea6ftiknFXSeJA)

Zotero **Help & FAQs:**

[zotero.org/support/start](https://zotero.org/support/start)

## Using Zotero

- **Getting Stuff Into Your Library**
  - [Adding Items](#)
  - [Adding Files](#)
  - [Feeds](#)
  - [Retrieve PDF Metadata](#)
  - [Importing from Other Reference Managers](#)
- **Organizing Your Library and Taking Notes**
  - [Collections and Tags](#)
  - [Searching](#)
  - [Sorting](#)
  - [Notes](#)
  - [Related Items](#)
  - [Duplicate Detection](#)
- **Generating Bibliographies, Citations, and Reports**
  - [Creating Bibliographies within Zotero](#)
  - [Word Processor Integration](#)
  - [Citation Styles](#)
  - [Reports](#)
- **Syncing, Collaboration, and Backup**
  - [Data and File Syncing](#)

## Zotero Feedback

Please provide feedback so we can improve these guides.

\* Required

What is your role? (Check all that apply) \*

- Undergraduate Student
- Graduate Student
- TA
- Professor
- Researcher
- Other: \_\_\_\_\_

What University do you attend? \*

- UMass Amherst
- Other: \_\_\_\_\_