

# Using Zotero

## Managing References, Citations, and Preparing Bibliographies

### Prerequisites

#### Zotero Setup

1. Download the Zotero desktop application from <https://www.zotero.org> and install it on your computer
2. Click the **Tools** menu and select **Install Browser Connector** to integrate Zotero with Firefox, Chrome, or Safari. This will add a Zotero button to your browser's toolbar.
3. Install Zotero's Add-on for Microsoft Word or LibreOffice (depending on the word processor you prefer) by clicking the **Tools** menu and selecting **Add-ons**. This will add a set of buttons in your word processor's toolbar.

#### Create Your Zotero Account

1. Click on the Log In link at the top of the Zotero web site then click the "Register for a free account" link.
2. Fill in the form and complete the registration process. Follow Zotero's instructions to enable your account to synchronize with your desktop application. This will allow you to access your references and documents through Zotero's web site as well as on your computer.

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## Part 1

### 1. Building your personal database of references

There are several ways to add reference information to your personal database of research.

1. Use the Save to Zotero button on your web browser to retrieve information from a database (or other source)
2. Import the information from a file (e.g. ris or bibtex)
3. Ask Zotero to Retrieve Metadata for PDF
4. Add an item using an identifier (e.g. ISBN or DOI)

*Tip: You have access to many documents through the Concordia library. Off campus, you may hit a paywall and not be able to access these documents. Zotero can help you get access by automatically adding the Library's proxy server to its settings so that when you're not connected to the Concordia wifi*

*network, you will still be able to access and download research. As you do the following exercises, notice when Zotero calls your attention to the proxy (you'll see a yellow notification at the top of your browser). Accept these proxy settings.*

## **2. Using the Save to Zotero Button**

For the following exercise, use the *Political Science Complete* database.

1. Open a web browser and go the Libraries' home page
2. Select the link to "Databases by subject"
3. In the box "Search for database by:" enter "Political Science Complete" and click "Search"
4. Click on the "Political Science Complete(PSC)" link
5. Search for **elections AND Canada** (or use some keywords related to your own interest).
6. Review the list of results and decide on several that you think would be useful to keep.
7. Click the Save to Zotero button in your web browser (the button will have a folder image on it now). It will show you a list of the documents on the page, select the boxes of the articles that you'd like to put into Zotero.
8. Wait while Zotero saves the bibliographic information and PDFs (where available).
9. Now try importing just one article at a time. Go back to your web browser's page of search results.
10. Click on a link to one article so that you see all of the information about it.
11. Click the Save to Zotero button in your web browser (the button will have a document image on it now).
12. Wait while Zotero saves the bibliographic information and PDF (if available).
13. Repeat steps 5 - 8 using <https://scholar.google.com> to compare how it works, the process is the same.
14. Go to the Google Scholar Settings and change the drop down under Bibliography Manager to say "**Show links to import citations into EndNote**", then click Save.
15. Click the link that says Import into EndNote in one of the Google Scholar results. This will open Zotero and ask if you'd like to import this type of file (.ris). Click OK.

Note – It's a good idea to always double-check references once they have been imported in order to verify accuracy and completeness.

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### 3. Retrieve Metadata (Bibliographic Information) for a PDF

1. Go the Libraries' home page in your web browser
2. Select the link to "Databases by subject"
3. In the box "Search for database by:" enter "jstor" and click "Search"
4. Click on the "Connect:" link just to the right of the first Jstor entry
5. Search for "animals politics" (or use some keywords related to your own interests).
6. Find a journal article within the list of results and click the **Download PDF** button to save a PDF to your computer. *NB: depending on your browser's settings, this may open the PDF within the web browser. If that happens, click the icon in your browser's PDF reader to save the file to your computer. You can also click the Save-to-Zotero button in the browser toolbar and it will bring it into Zotero, retrieving (if possible) the bibliographic info at the same time.*
7. Open your computer's application to browse files and folders (e.g. Explorer, Finder, or Nautilus) and go to where you saved your PDF.
8. Drag the PDF onto your Zotero application. This will copy it to Zotero and Zotero will automatically try to get the bibliographic information about the PDF to create an entry for it.
9. If you try this with other PDFs and no reference entry appears in Zotero, namely you only see the PDF, you can also right click on the PDF and select "Retrieve Metadata for PDF" from the menu. This will cause Zotero to try and get that information to build an entry.

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### 4. Add an item using an identifier (e.g. ISBN or DOI)

1. Go the Libraries' home page in your web browser
2. Select the link to "Databases by subject"
3. In the box "Search for database by:" enter "Scopus" and click "Search"
4. Click on the "Scopus" link (just to the right of "Connect to:")
5. Search for "**artificial intelligence**" (or use some keywords related to your own interests).
6. Click on one of the results to see the details of the document. Scroll down the details page until you find the **DOI** (digital object identifier) and copy that code. It should look similar to *10.1016/j.inffus.2018.09.012*.
7. Click the magic wand icon in Zotero and paste the DOI into the box.
8. After a few second Zotero will have retrieved the bibliographic information for the document as well as the PDF if it can find a source to download it from. Tip: you can also use this technique for books by pasting in the book's ISBN code.

Tip: If you add a reference but are missing the PDF, right click on the reference and Zotero will show you an option to "Find Available PDF". If there is an open access source available, Zotero will retrieve it.

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## Part 2

### 5. Organizing References in Collections

1. Click the **New Collection** icon (folder) in the upper left of Zotero
2. Enter a name for your new collection and click **Ok**.
3. Repeat steps to create additional collections, if necessary
4. You can drag a collection's folder icon onto another collection to nest it inside
5. Click the "Unfiled Items" icon near the bottom of your Library hierarchy. This will show you all the references in Zotero, which you have not organized into collections.
6. Drag-and-drop individual references onto the folder icons of the collections in which you'd like those references to appear. You can include a reference in multiple collections. You can also select multiple references and drag them all at the same time (CTRL or SHIFT click).
7. To remove a reference from a collection, select the reference and press the delete key. It will be removed from the collection but not deleted from Zotero.

*Tip: To delete a reference entirely, you must right click on it and select Move to trash.*

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### Preparing Bibliographies and Citations

#### 6. Basic Bibliography

1. Right click on one of your collections
2. Click **Create Bibliography from Collection...**
3. Select the citation style that you would like to use, from the list provided
4. Choose **Bibliography** under Output Mode
5. Choose Save as RTF from Output Method (this is file format that will open in most word processors)
6. Save your file.

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## 7. Citing in Your Word Processor

1. Create a practice document in your word processor
2. Click the Zotero icon in your word processor's toolbar to **Set Document Preferences** (image of a cog with a Z).
3. Choose the citation style that you would like to use from the list provided and click **Ok**. If you do not see the one you want, you can click **Manage Styles**, then **Get additional styles...** from the new window to add the correct citation style.
4. Type something on your page and insert a citation by clicking the **Add/Edit Citation** button in the toolbar (image of a document with a Z).
5. Start typing the title of the document you'd like to search or the author's name and Zotero will suggest possibilities from your personal library. Click on the document you would like to cite and tap **Enter** on your keyboard to insert it.
6. Type some more and insert another citation. This time, when the search window appears click the **Z** icon on its left and select "**Classic View**", which will allow you to browse through your whole Zotero library and select the document you would like to cite.
7. Add a couple more citations.

## 8. Inserting a Dynamic Bibliography in Your Word Processor

1. In your practice document, move your cursor to the very end of your document.
2. Click the Add/Edit Bibliography icon (image of books with a Z) in your word processor's toolbar.
3. You will see that Zotero has added a bibliography for the references that you cited.
4. As you continue to work on your document, Zotero will update this bibliography.

If you are using **Google Docs** to write (or work with your team) you can follow the same process. You don't need to install anything extra. Look for the Zotero menu in Google Docs.

*Tip: To edit any of your citations or references, make the changes inside Zotero, then click the **Refresh** button (image of circling arrows with a Z) in your word processor's toolbar.*

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## Resources for More Help

- Official Zotero documentation  
<https://www.zotero.org/support/>
- Documentation on how Zotero works with Google Docs  
[https://www.zotero.org/support/google\\_docs](https://www.zotero.org/support/google_docs)

- How Zotero can help you access documents away from campus  
[https://www.zotero.org/support/connector\\_preferences#proxies\\_preferences](https://www.zotero.org/support/connector_preferences#proxies_preferences)
- Alternate cloud file storage options that work with Zotero  
[https://www.zotero.org/support/kb/webdav\\_services](https://www.zotero.org/support/kb/webdav_services)