

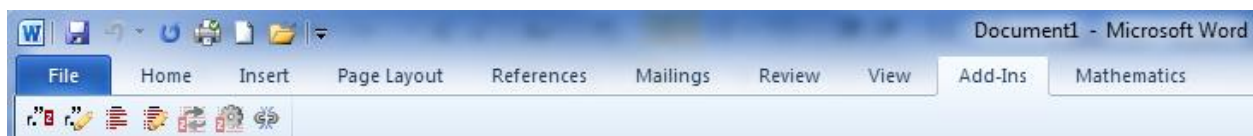
GATHERING AND MANAGING CITATIONS WITH ZOTERO

What is it?

Zotero is a bibliographic management tool that allows you to gather, organize, cite, and share all types of research sources. There are two versions: Zotero for Firefox, an extension that lets you organize your sources within the browser as you find them, and Zotero Standalone, a separate application with available extensions for multiple browsers. This guide describes Zotero for Firefox.

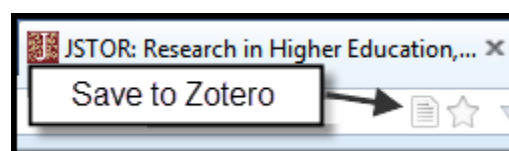
Getting Started

- Make sure you have a current version of Firefox installed. Install or update at <http://www.mozilla.org>.
- Install Zotero for Firefox:
 - Visit www.zotero.org/download.
 - Install Zotero 4.0 for Firefox. Restart Firefox when prompted.
 - If the installation is successful, you'll see the **Z** icon at the top right whenever you open Firefox. Click that icon to open the program. Zotero will overlay the lower half of the webpage you're viewing. (If you don't see the icon, look under the Tools menu for Zotero.)
- Install a word processor plugin:
 - Visit www.zotero.org/download.
 - Under Zotero for Firefox, click plugin for Word or LibreOffice.
 - Install the plugin for the word processor you use. Restart your browser.
 - If the installation is successful, you'll see the Zotero menu added when you open your word processor.





Importing Sources into Zotero

Zotero automatically “senses” importable content, identifying the type of source you are viewing and allowing you to add it to your Zotero library with one click. When Zotero recognizes an importable source, you'll see an extra icon added to the end of your URL bar.





Different types of content have different icons:

- Book 
- Journal article 
- Newspaper article 
- Video recording 
- Blog post 
- Web page 
- Thesis 
- Multiple items 

Click the icon to add the item or items to your Zotero library. Zotero will create a record with bibliographic information about the item. If the full text is available (e.g., a PDF of a journal article), Zotero automatically imports a copy of it, too.

Zotero is compatible with most library databases as well as many other online sources—bookstores, blogs, newspapers, even YouTube.

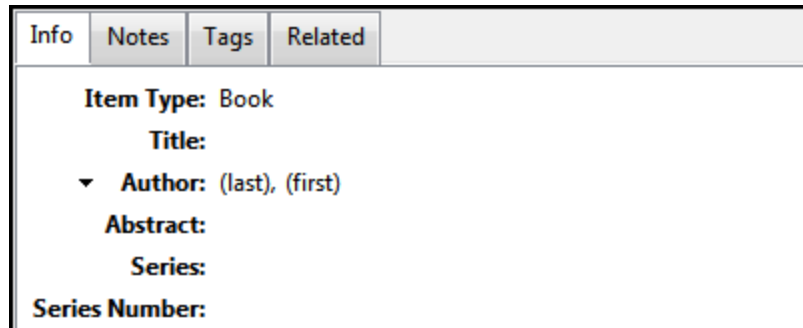
Other ways to add sources

- Enter an identifying number
 - Open Zotero and look for the toolbar above the center column
 - Click  (Add Item by Identifier)
 - Enter ISBN, DOI, or PMID – Zotero will look up the number and generate a record
- Enter items manually
 - Click  (New item)
 - Choose an item type
 - Enter item information in the Info tab
- Drag in PDFs
 - Drag a PDF from your computer to the center column (the list of items in your library)
 - Right-click the PDF and choose Retrieve Metadata for PDF
 - If the file includes metadata that Zotero can read, it will create an item record and attach your PDF to it

Editing Information about Sources

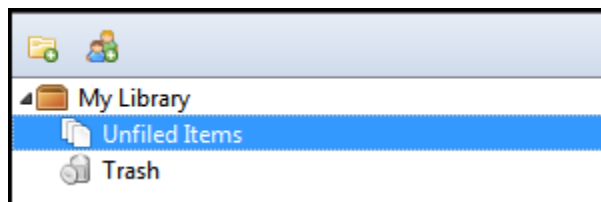
Each item in your Zotero library has four tabs of content: Info, Notes, Tags, and Related. You can edit or add to this content to make your Zotero library more useful. Changes are saved automatically.


- Info – bibliographic/citation information
- Notes – content added by the user
- Tags – an organizational option. Tags are usually created by the user, but may be imported automatically for some sources and types of items. You can always delete or change tags that you don't want.
- Related – connects items in the Zotero library to one another. For example, you might create a relationship to remind yourself that one article in your library cites another.

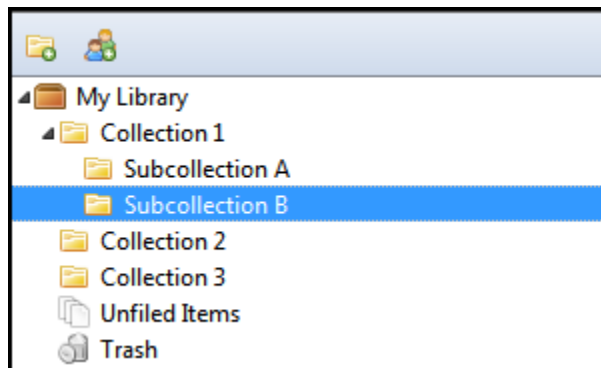


Organizing Items

By default, everything added to Zotero is placed in the Unfiled Items section under My Library.



Click  (New Collection) to create folders within your library. You can also right-click the folders you've created to make subcollections. To organize your library, just drag items from one folder to another.

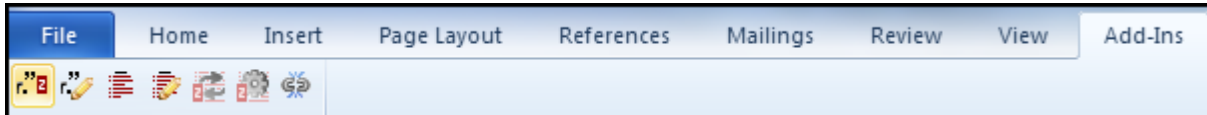


Deleted items are moved to the Trash folder. You can right-click the Trash folder to empty it, or right-click a deleted item and choose “Restore to Library” if you decide to keep it. (If you try to import an item and see an error message that says “You cannot make changes to the currently selected collection,” it probably means you have the Trash folder selected. Select Unfiled Items or one of your collections and try again.)

Creating Citations and Bibliographies

The Zotero word processor plugin helps you create and modify citations and bibliographies using the items in your Zotero library.

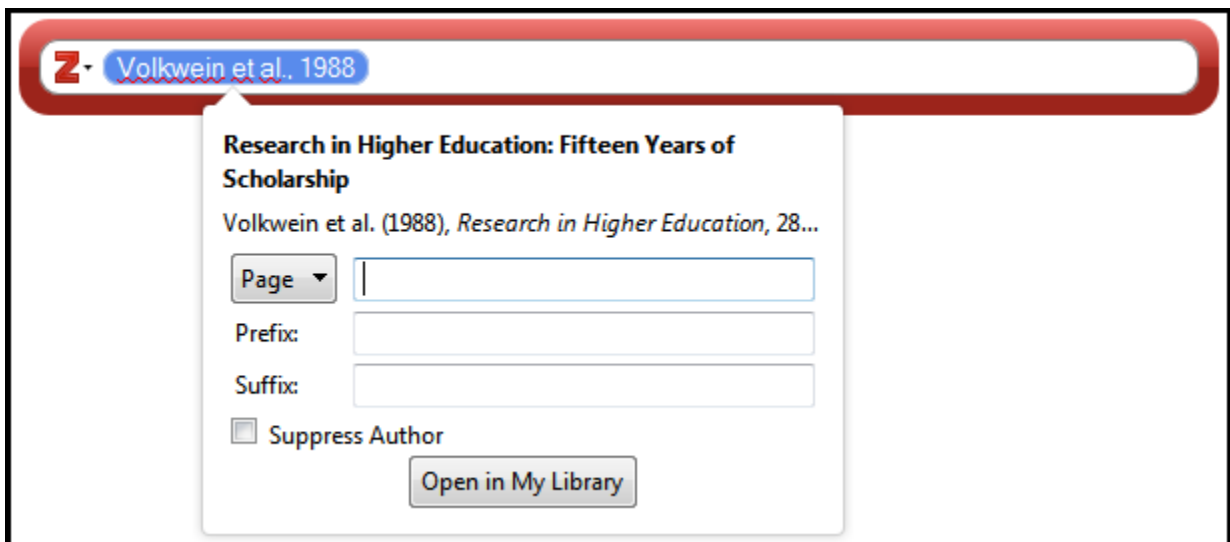
To add a citation to your text, select Zotero Insert Citation (the first icon on the left). The first time you insert a citation in a new document, you'll be prompted to select your citation style. (About fifteen styles are included with the initial installation of Zotero. If the one you need is not among them, you can install nearly seven thousand more from the Zotero Style Repository at www.zotero.org/styles.)



Start typing the title or author of the source you wish to cite. Zotero will suggest one or more matching options. Choose the one you want.

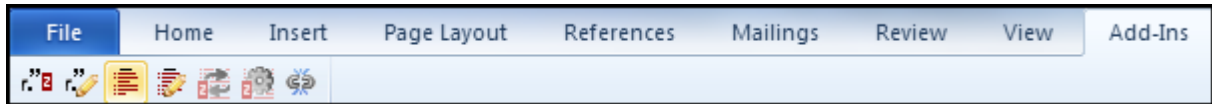


To add a page number, click the author's name in the blue oval, then use the dialog box. Hit enter when you've finished. A citation will be created in the style you selected.

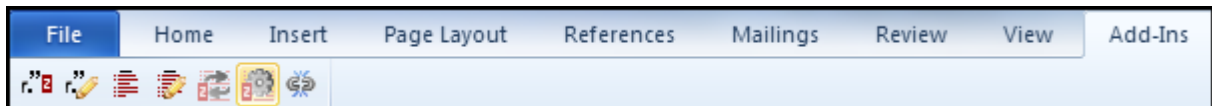


To create your bibliography, navigate to the point in your document where you would like your bibliography or Works Cited list to appear. Select Zotero Insert Bibliography (the third icon from the

left). Zotero will generate a bibliography in the style that you selected when you inserted the first citation.




You may find it necessary to change from one citation style to another. To do this, select Zotero Set Doc Prefs (second icon from the right). Choose the new style. Zotero automatically updates both the textual citations and the bibliography at the end to the new style.



Syncing and Sharing

To back up your Zotero library, access it from multiple computers, or share it with another user, you'll need to create a Zotero account. First, go to the Zotero website and click Register. Create a user name and password.

Open your Zotero library on your computer. Click the icon at the upper right labeled Sync with Zotero Server . You will be prompted to enter the user name and password you created. After syncing, you can log in to zotero.org and use your library online. You can also sync more than one computer to the same Zotero account, so that you can work in multiple locations.

Finally, you can use your Zotero account to create research groups and invite other users to view and contribute to shared libraries.

Questions?

Additional tutorials, including screencasts, are available at <https://www.zotero.org/support>. For questions and troubleshooting, check the forums at <https://forums.zotero.org/categories/>.

Contact Molly Strothmann, Social & Behavioral Sciences Librarian, at mstrothmann@ou.edu with questions about Zotero or to arrange instruction for classes and other campus groups.