



zotero 6.0

Introductory guide: Mac and Windows

March 2023

This guide is a comprehensive introduction to using Zotero at Massey University Library.

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Getting & Setting up Zotero

Zotero 6.0 was released Mar 2022. Core functionality remains unchanged, but new work-flow features have been added such as integrated PDF management, enriched Notes and fuller support for iOS devices.

Download Zotero

1. Get and Install Zotero

Go to zotero.org/download and select **Zotero 6.0 for Mac** or **Windows** (as appropriate).



Open and run the program. Once installed drag the icon to your dock/toolbar.

Mac users note that you'll require macOS 10.11 (Big Sur) or later. If you can't update your OS the only option may be to use the older Zotero ver. 4.0 with limited functionality.

2. Install a connector for your browser of choice – Zotero will detect and offer it for the browser you are using (*Chrome, Firefox or Safari – NOT Microsoft browsers*).

Restart your browser.

Mac users: note that you don't need to install a connector as it comes bundled with Zotero for Mac.

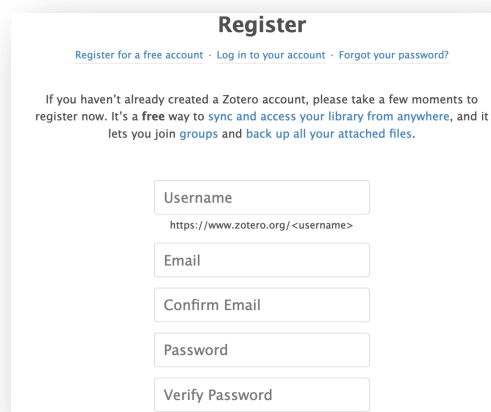
Instructions are on the download page. While *Safari* is now better supported there are a few inconsistencies – *Chrome* or *Firefox* are to be preferred.

Create & Sync your Zotero Account

Register for an Account at Zotero.

You will be prompted to do this. If you are not, go to [Zotero.org/user/register](https://zotero.org/user/register)

This allows you to store all your sources to the Zotero server ('cloud'), enabling syncing your library to other devices, creating group libraries to collaborate with other Zotero users and (usefully) backing up your library.



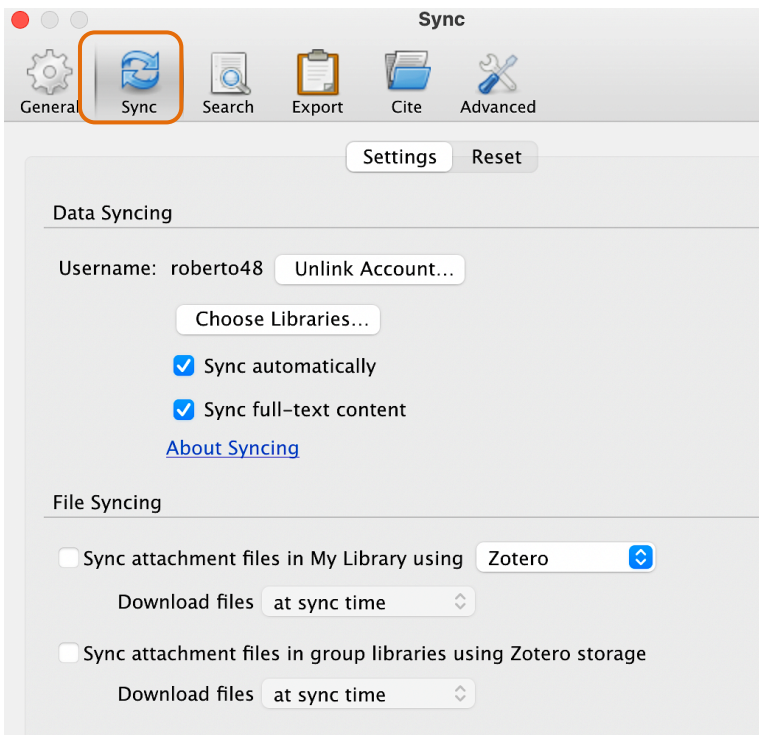
Configure your Preferences

Open the Zotero application

On a **PC**: In the **Edit** menu, select **Preferences**. On a **Mac**: In the **Zotero** menu, select **Preferences**

1. Enter your details in the Sync tab

... enter your username and password from your online Zotero account. Then click OK if using Windows.

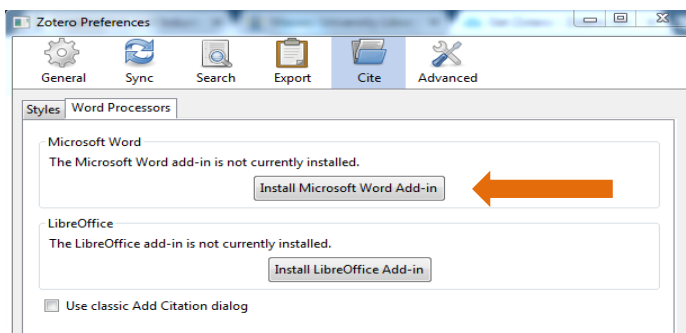


Unticking the **File Syncing** options (for attachments files and group libraries) is recommended unless you are likely to only have a small number of full-text PDF sources, or are willing to upgrade to a paid account for increased online storage in your Zotero Web/cloud library.

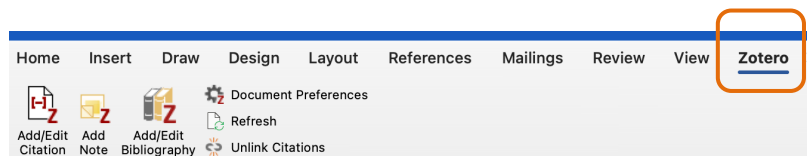
Leave the **Data syncing** options ticked to allow syncing of source data between a Zotero library on different devices.

2. Install and activate the word processor plugin

The word processor plugins are bundled with Zotero and should be installed automatically for your installed word processor when you first start Zotero. If not there, select the **Cite** then *Word Processors* tabs and click on **Install Microsoft Word Add-in** to get the latest version. A restart may be required.



Next open *Word* to look for the Zotero **toolbar** – select Zotero tab:



If not there ask for Library assistance or go to: *Zotero website*> *Documentation*
> Word Processor Plugin Troubleshooting.

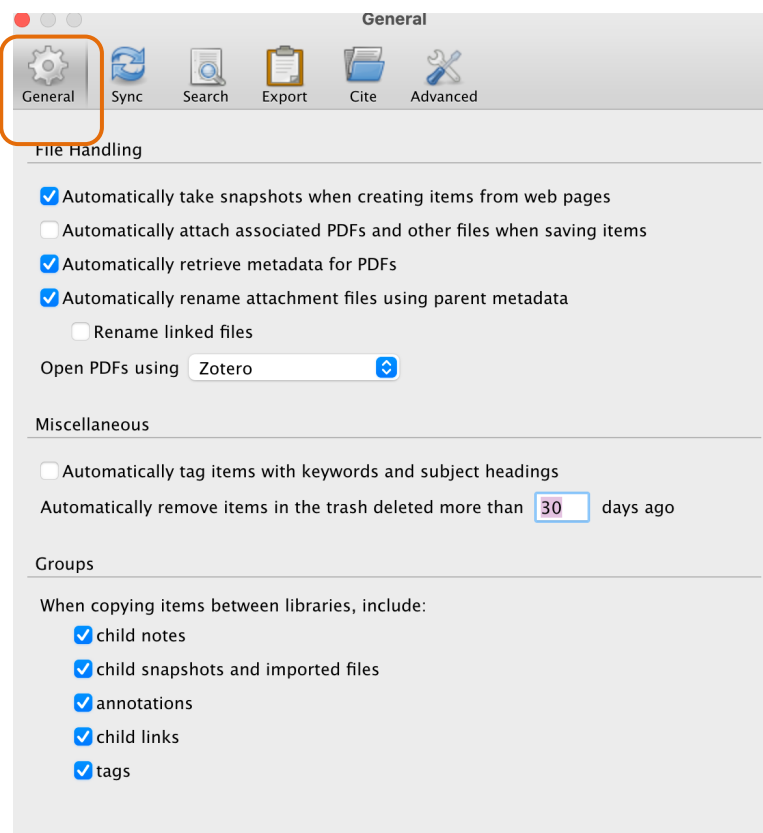
To use **Google Docs** with Zotero, you must have downloaded the Zotero program and the connector to the browser you use to access Google Docs. Using Zotero for the first time in a document will prompt you to

authenticate the plugin with your Google account. You can then begin inserting citations from your Zotero libraries just as you can with Word.

3. Configure general preferences

In the General tab uncheck, if applicable, the following boxes under Miscellaneous:

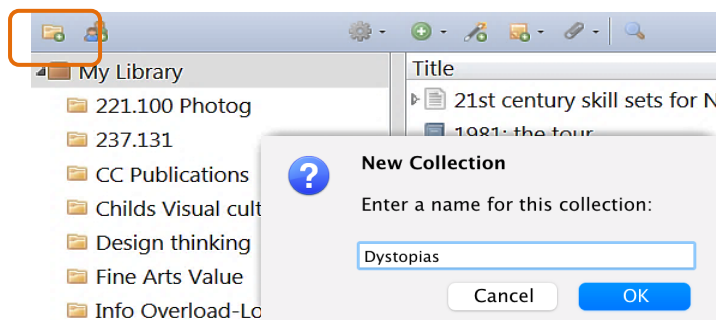
- If you do not want PDFs to be automatically downloaded into Zotero, uncheck the box next to **Automatically attach associated PDFs and other files when saving items**. If you leave this option checked, go back to the **Sync tab** and uncheck the **File Syncing of attachments** options. This will stop full-text PDFs attaching to your online Zotero storage sources (which has a 300MB limit), but not in the Library on your own device.
- It is recommended to uncheck **Automatically tag items with keywords and subject headings** to prevent Zotero from automatically importing subject headings from databases.



Adding Items to your Zotero Library

Create Collections

Everything added to your Zotero Library appears in 'My Library' but you can also duplicate these into any number of folders (termed 'Collections') and sub-collections. Create a new collection by clicking the **folder icon** above the library pane. Create a sub-collection by right clicking on an existing collection and selecting New Sub-collection.



When a collection is open any items you save will automatically be filed into that folder as well as automatically added to **My Library**.

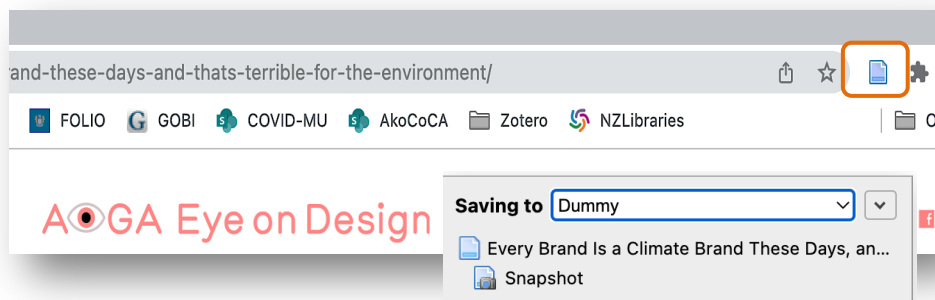
Saving Web Pages

Zotero can recognize descriptive information ('metadata') from many different forms of web pages.

To save a web page just click on the **source icon** to the right of the address bar.

The form of the icon will change for different sources (webpage, newspaper, book ...)

The metadata and (if selected) a snapshot of the page will be saved to Zotero.



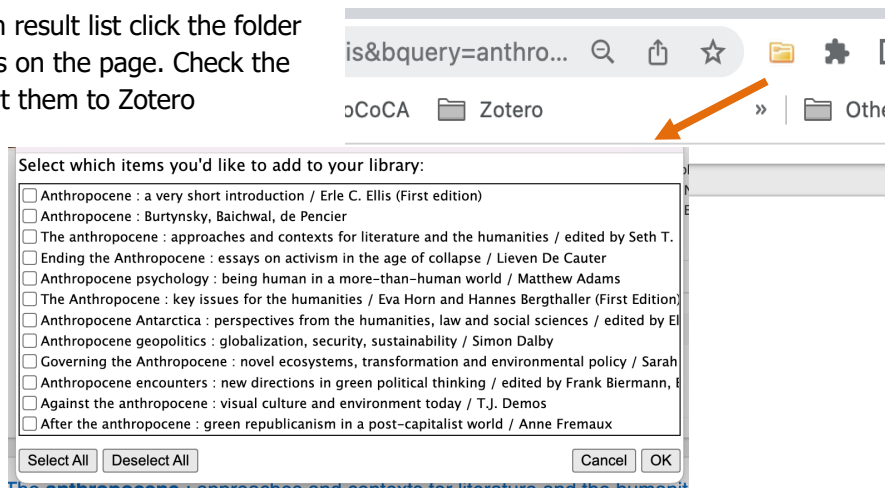
Saving Sources from Library Databases

You can import reference data for sources from most Library databases into Zotero including **Discover** and other **EBSCO Databases**.

To save individual sources click on the book or article title to open the full record, then on the source icon to the right of the address bar (as for a Web page).



To save **multiple items** from a search result list click the folder icon. This will generate a list of sources on the page. Check the ones of interest and then 'OK' to import them to Zotero



Note: if there is no Zotero icon visible on the address bar you may still be able to use the export tool provided by a database. Zotero supports export from *BibTex*, *RIS*, *Dublin Core RDF* and other formats.

Google Scholar

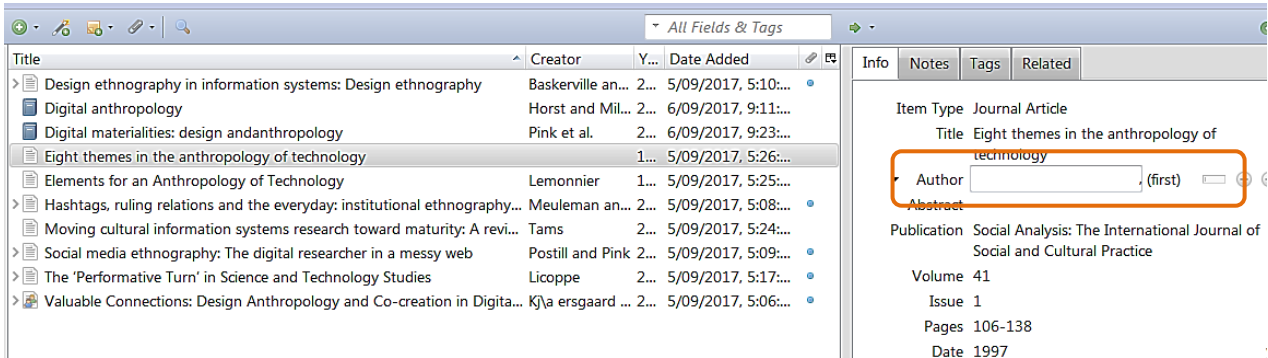
Exporting items from Google Scholar is essentially the same as other databases. To save individual items simply open the source from the results then save it using the icon on the address bar.

To save multiple items from a search result, click the folder icon to generate a list of sources on the page, then check ones you want to save [as above].

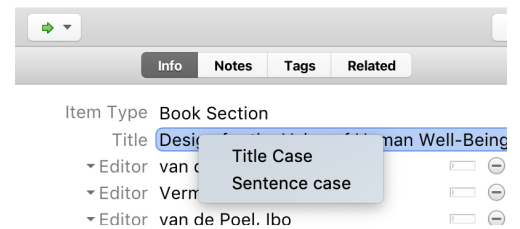
Check Citations for Accuracy

Although most of the reference information that Zotero captures will be fine, you'll need to check every item's data for accuracy and correct and/or add if need be. Zotero will accurately import the metadata, but that data itself may not be accurate.

You can add or amend any information by clicking any field in the Info pane to activate the edit function.

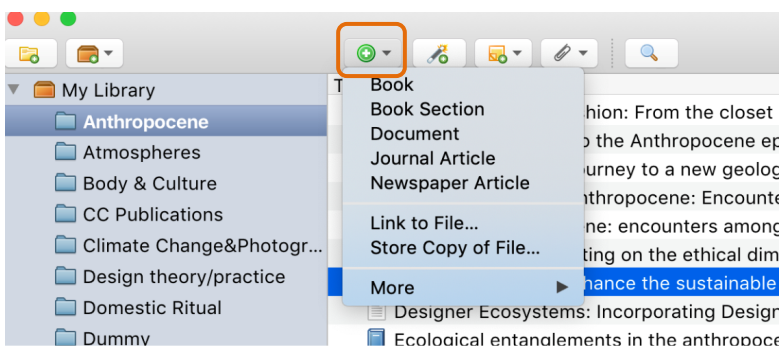


Note that Zotero's output for APA style does not automatically change 'title' casing to 'sentence' style as APA requires. To change titles that are not in sentence case for APA or other styles, **right-click** on the title and select **Sentence case**.

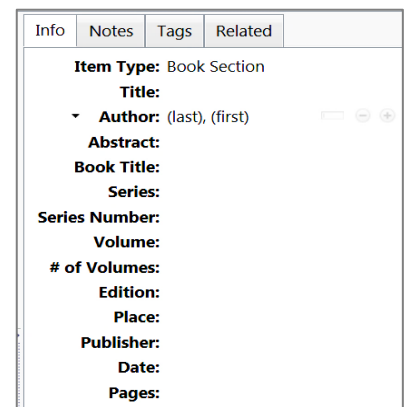


Manual Entry of Sources

If you can't automatically save or export items from any site then you can create a manual entry. Use the drop-down menu on the *New Item* button to choose the type of source you want enter e.g. Journal article, blog post, Book section [=chapter] etc.



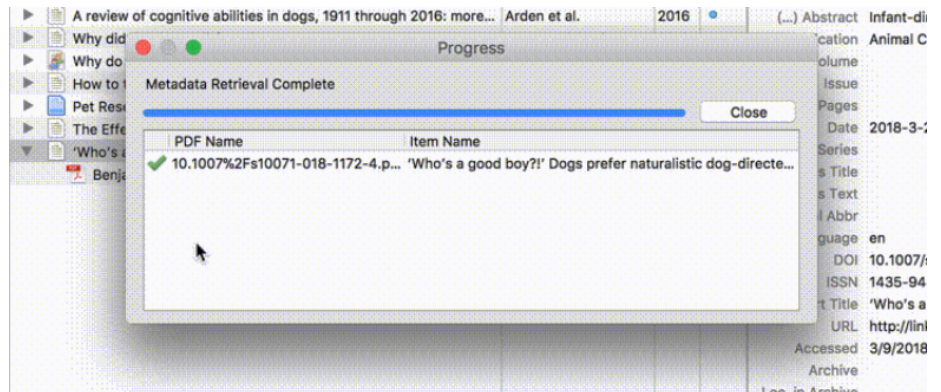
This will open a **form** in the right pane to enter known details in the fields. You don't have to complete all fields, just those needed for your citation style for the item/source type.



Saving & Working with PDFs

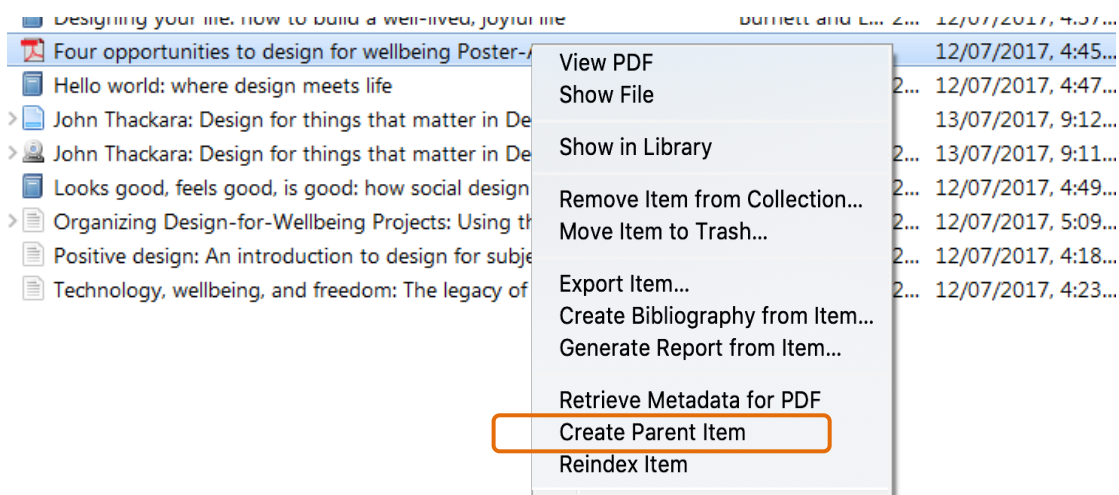
If selected in the *Preferences* [see p. 3] Zotero will automatically download an associated full text PDF of a saved source, if it's available.

You can also save PDFs already on your device to Zotero by dragging and dropping them into the middle pane of a collection. This will initiate an automatic search for metadata; if found it will then create the record and attach the PDF.

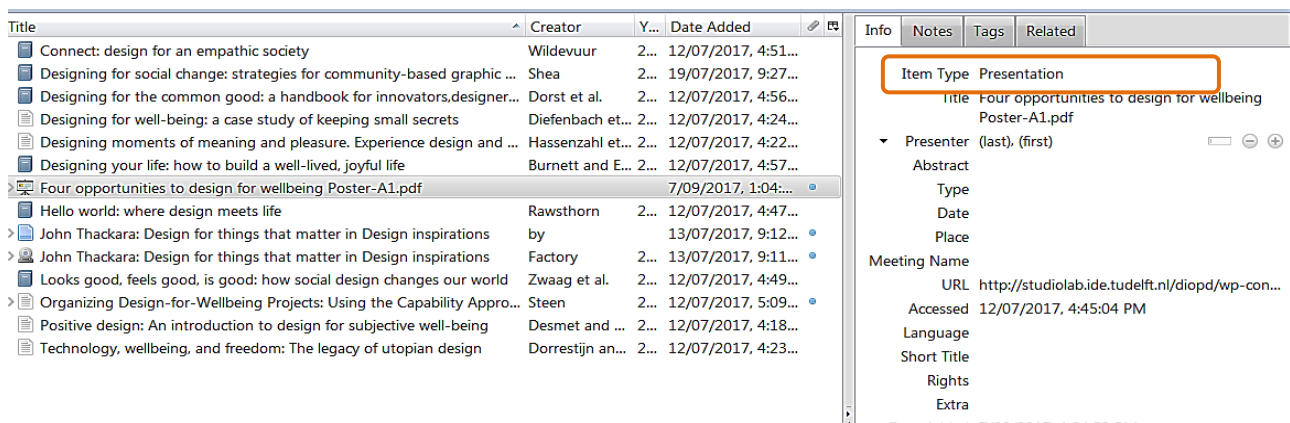


Remember though, to prevent hitting the storage limit of your free online Zotero account, go to *Preferences* > **Sync tab** and uncheck **Sync full-text content** [see p.2].

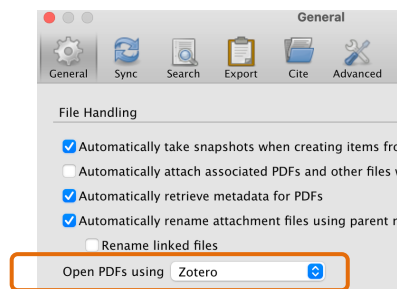
If you're not happy with the results, right-click the item and select *Undo Retrieve Metadata*. If retrieving metadata does not work, you'll need to manually add the information to the item. Right click and choose **Create Parent Item** :



Now, you can fill in the information for the item manually. Make sure you change the **Item type** to the correct entry as this controls how the citation is formatted.



Zotero ver 6.0 includes a **PDF Reader** that allows you to open [in a tabbed interface], read, annotate and add metadata to any stored PDF. To activate this you will need to choose to open them within Zotero – go to the Preferences-General tab.

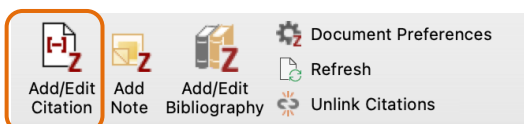


Creating Citations & Bibliographies from Zotero

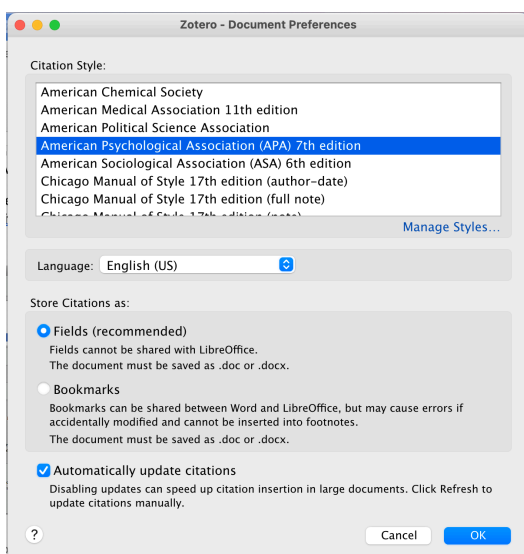
The following refers to working with *MS Word* docs (Mac or Windows); *Libre Office* works similarly. Zotero also offers *Google Docs* integration (see process following Word description).

Inserting Citations in Word Documents

Note: if the Zotero tab is not showing in Word then go to the [Zotero site documentation](#) for guidance.



Ensure your Zotero Library is open. Place your cursor where you'd like to add a citation in the text and click **Add/Edit Citation** in the Zotero toolbar

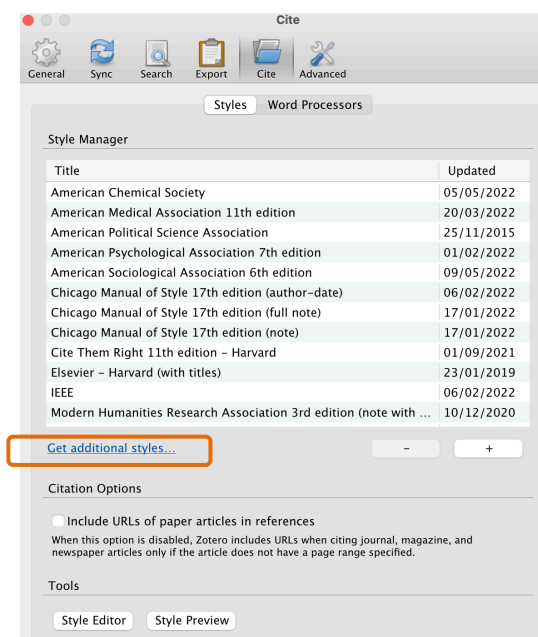


Select a Citation Style

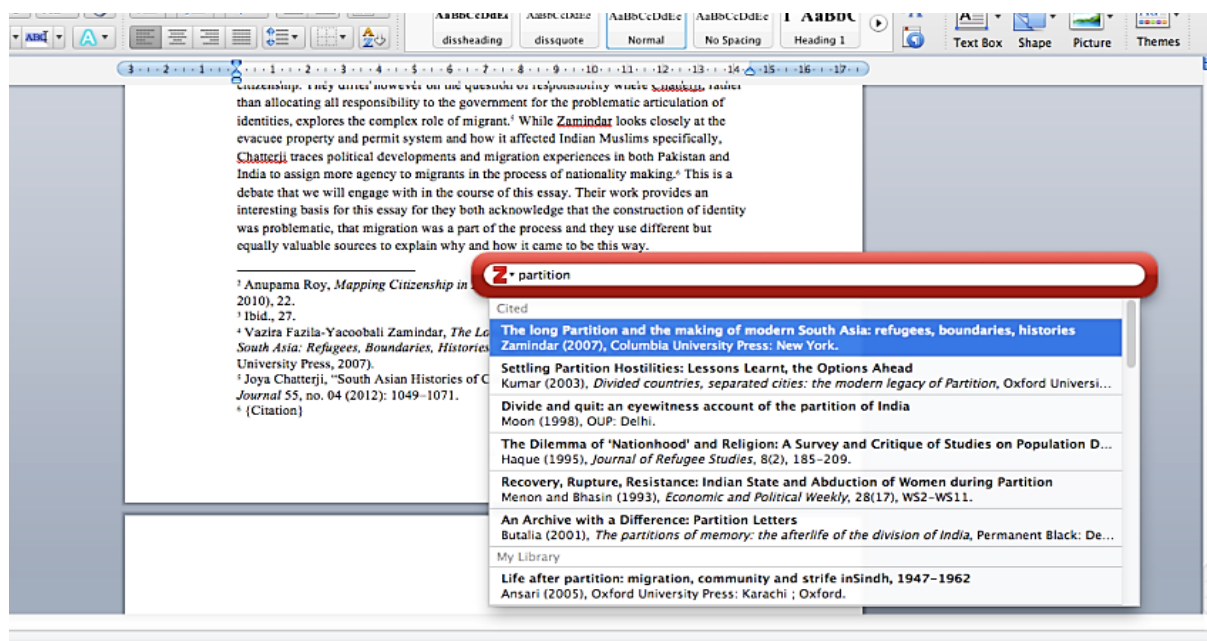
The first time you insert a citation in a new document you will be required to choose a citation style. Commonly at Massey this will be **APA 7th edition** or **MLA 9th edition**.

Note: if you do not see the style you want listed, you'll need to click on **Cancel** and go to Zotero's **Preferences**. Under **Cite** select **Styles**. Click on **Get additional Styles...**

Find the style you want and click on the title. Click on **Install**. This style will now be listed when you go back into Word to install the first citation.

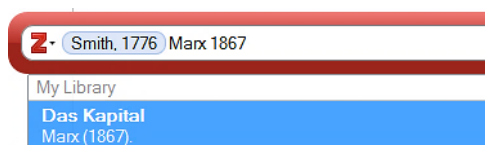


Once the style is selected a red Zotero search bar should open. Enter a key word from the source title or author you want to insert - a list of options will appear. Select the desired item and hit **Enter twice**.



Inserting Multiple Citations

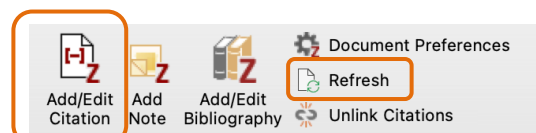
After selecting the first item, don't press return, but type the key word for the next one, select from the listing and the next will appear.



Editing Citations

Any errors or changes in an in-text citation need to be corrected in Zotero, not in Word - always use the **Zotero Edit Citation** function in the Zotero toolbar if you are making changes like those following. And if you have updated any citations in Zotero, click the **Zotero Refresh** button on the toolbar to update your document.

To **edit an** in-text cite, highlight the citation, then click **Add/Edit Citation** on the toolbar.



Place your cursor inside the blue highlighted citation and an editing box will pop up:

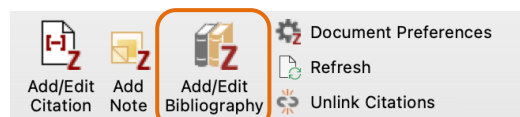


Add or edit **page numbers**, prefixes or suffixes or omit an author as required, then press enter twice.

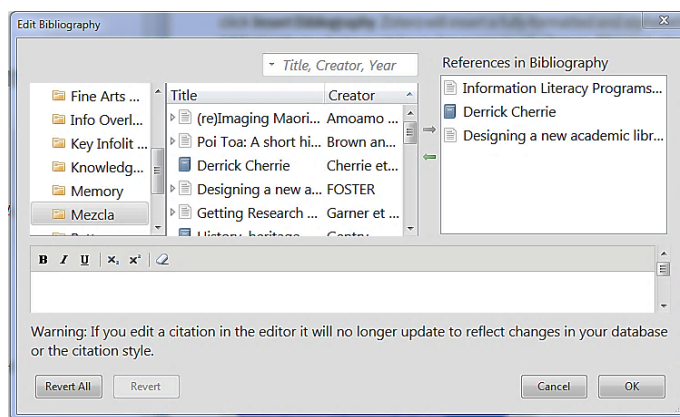
To **delete** a citation highlight/select the citation (all the greyed area), **delete** it, then click the Zotero **Refresh** button.

Creating References and Bibliographies

You can create a Bibliography/References list at any time once you've added a few citations. Position your cursor at the end of the doc then click **Add/Edit Bibliography**. Zotero will insert a fully formatted and alphabetized bibliography in whatever style you have previously chosen. All in-text cites subsequently inserted will automatically generate a reference in the bibliography in alphabetical order.



Clicking the **Add/Edit Bibliography** button will open a window where you can select and add additional items to the bibliography that you haven't cited in-text, or remove cited items from the bibliography.

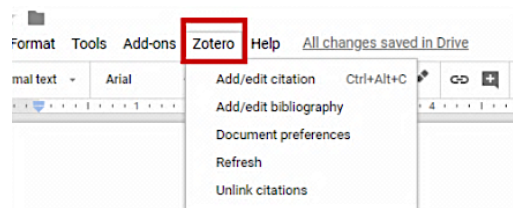


Zotero will also integrate with **writing tools** such as *Scrivener* or *Overleaf* - though with more limited functionality than Word. See the [Princeton University Library](#) guide.

Using Zotero with Google Docs

In brief. For fuller detail see [here](#).

Upon opening a Google Docs in a browser with a Zotero connector installed, you'll see a Zotero tab added:



To add a citation to your document, select "Add/edit citation" from the menu or click on the Z button in the Google Docs toolbar (far right). Choose your citation style as prompted and then add citations and create bibliographies as described for MS Word [above]. Note that there are some limitations:

- Citation inserts and edits slow down significantly as the number of citations in the doc increases – you may want to disable automatic citation updates in the Zotero document preferences.
- You can't copy Zotero citations between documents; copying citations within a document is OK.
- Text formatting related to citations may be limited.
- If someone views the document without the Zotero Connector installed, or if you download the document without first making a copy and unlinking citations, active citations in the document will show as links such as <https://www.zotero.org/google-docs/?abc123>.

Quick Copy

To quickly add a full **reference citation** to a document or email, select items in the centre column of your Zotero library and drag them into the desired text area - Zotero will automatically create a formatted reference.

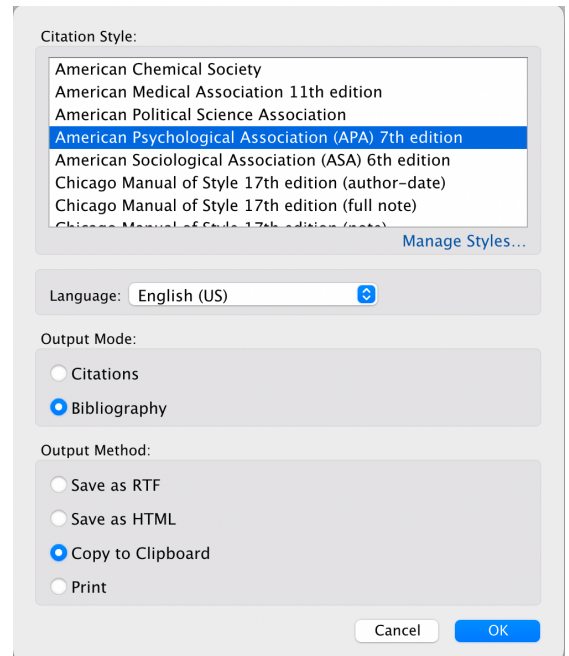
To copy **an in-text citation** instead of a reference, hold down the **Shift** key and drag.

Fuller Bibliography or Citation List

Highlight the required references in your Zotero library and then right-click (control-click on Macs) to select **Create Bibliography from Selected Item(s)...** Select a citation style for your citation/bibliography format and choose to either create a list of **Citations** or a **Bibliography**.

Then choose one of the following four ways to create your citation/bibliography :

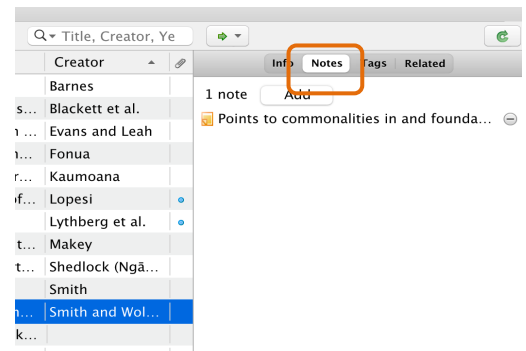
- **Save as RTF** to save the bibliography as a rich text file.
- **Save as HTML** to save the bibliography as a HTML file for viewing in a web browser (will also embed metadata)
- **Copy to Clipboard** to save the bibliography to your clipboard then paste into any document.
- **Print** to send your bibliography straight to a printer [may not be functional].



Working with Notes

Zotero 6.0 added a number of enrichments to the Notes function that allows you to add comment on sources. These are inserted under the **Notes** tab next to the main *Info* tab:

Features include a range of basic editing tools and a link inserter.



In a Word doc click on the **Add Note** button to select from a list of notes you want to add. The text of that note will then be inserted along with the associated citation.

Version 6.0 also allows you to embed **images** in the Notes area. Simply drag the image into the Notes field and annotate it with a caption or context. To insert into a document, click *Add Note*, select the appropriate note and enter. You will probably need to edit the image though with Word's *Picture Format* tools

Group Libraries

Project collaborators may set up group libraries in order to share sources. Members of the group need an individual Zotero account as access to the group library is through the Zotero 'cloud', and there must be

sufficient storage space to host group sources. If you intend to store full-text PDFs of the sources (not just the references) you may need to purchase additional storage space. To continue with the 'free' service you will have to limit the group references to 300MB - file storage always draws from the storage account of the group owner. [For an institutional 'lab' group there would be an annual subscription cost see [here](#).]

Setting up Groups

Go to the upper left-hand corner of the Zotero tool bar and click the **New Library** drop-down menu, then select **New Group**. This will take you to the Zotero website for new groups. If not already logged into your Zotero account, you'll be prompted to.

On the *Create a New Group* page enter your **Group Name** then select the **Group Type**. If you want to invite only known people choose *Private membership*. Click the **Create Group** button.

Review the permissions for each member.

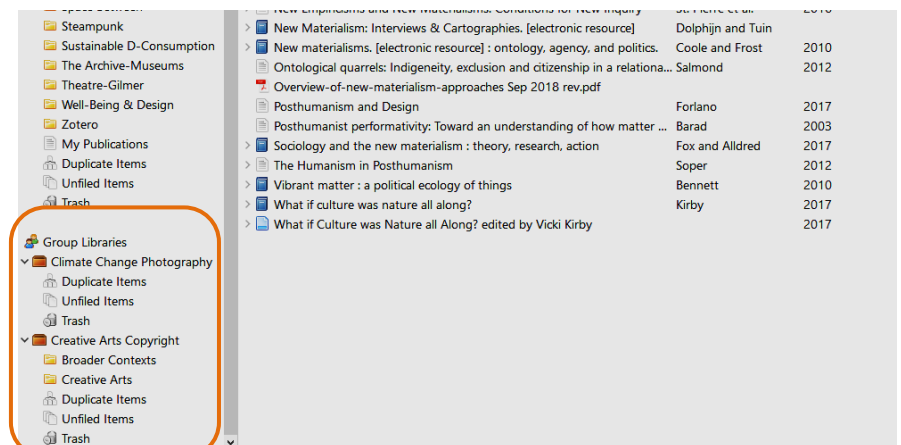
To invite other members click in **Member Settings** then the **Send More Invitations** link. (Best to send a personal email to invitees to let them know - it may end up in a spam folder). When invited members click on the link in the email they'll be added to the group.

Username	Full Name	Member Since
Ideacon	Lauren Deacon	2013-10-06 20:59:38
robert048	Craig Cherrie	2015-02-03 02:17:38

Member Invitations
No pending invitations.
[Send More Invitations](#)

Once members are in your group you can also configure their roles – Admin, Member or remove them.

To **add items**, return to your Zotero library on your own device. Your Zotero account will need to be synced before you'll see your group folder as your group library is stored in the Zotero 'cloud' so group members can access it from their respective devices. Group folders are listed below your personal folders in the left-hand pane.



Add items to your group library in the same way as your personal collections; click on a group folder, then do a search to add some new citations using the Zotero icon in the URL bar. Alternatively, you can drag and drop items from other folders into your group folders.

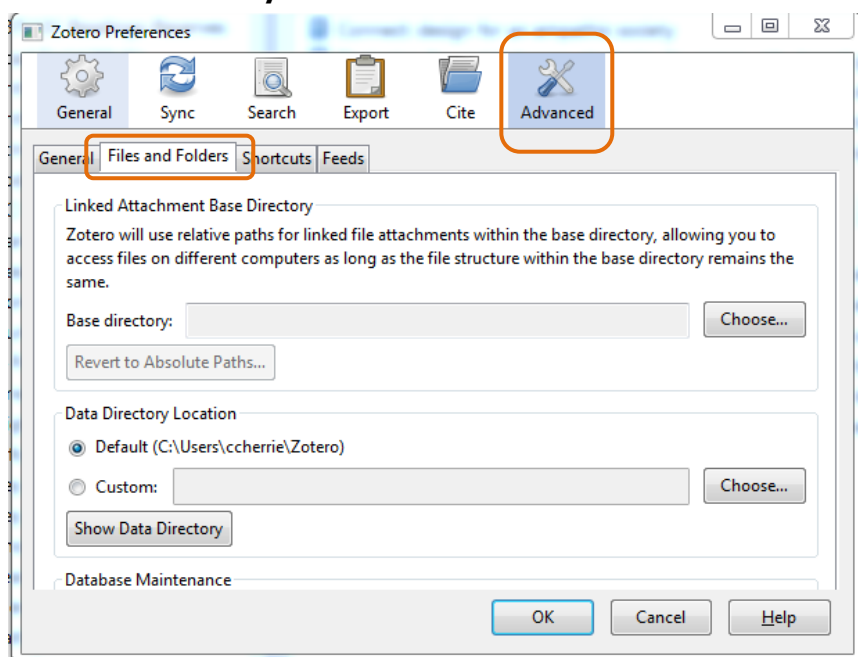
Backing Up your Zotero Library

if your data is substantial and vital it is important to back up your Zotero library regularly - 'syncing' is not always totally fool-proof and the Zotero cloud server stores only the most recent version of your library.

Copy your Zotero Directory

Note: before you copy or move any Zotero files be sure to close your Zotero library. Failure to do so could corrupt the data.

Open Zotero and go to **Preferences**, then **Advanced**. Click **Files and Folders**, then click **Show Data Directory**.



The Zotero directory on your computer will show.

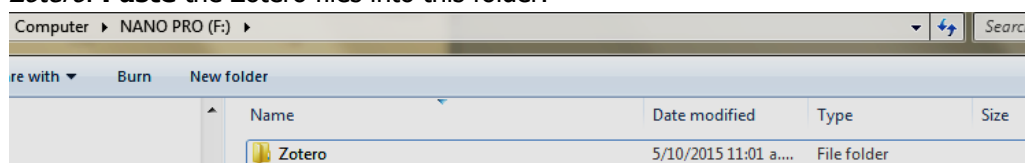
Close your Zotero library then highlight all files on the **Zotero directory** box (copy the entire directory, including storage and the other subdirectories).

Now right click to **Copy** these files and **Paste** files to the backup repository.

For fuller detail see [Backing up your Zotero Data](#).

Save your Zotero directory to an External Device

Go to your backup location (e.g. a USB drive or recognised device), create a **New folder** and name it as **Zotero**. **Paste** the Zotero files into this folder.



Be sure to include a **date** in the name of the saved Zotero backup folder e.g. Zotero 5 oct 2022.

Further Guidance

Look at the **Zotero website** *Documentation* sections: <https://www.zotero.org/support/start>

or email **library@massey.ac.nz**