



zotero 5.0

Introductory guide: Mac and Windows

November 2019

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

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Getting & Setting up Zotero

With the release of Zotero 5.0 (July 2017) *Zotero for Firefox* and *Zotero Standalone* have been replaced by a single **Standalone** version. This is a browser-independent application, though you will have to download a separate 'connector' for your chosen browser.

Download Zotero

1. Get and Install Zotero

Go to zotero.org/download and select **Zotero 5.0 for Mac** or **Windows** (as appropriate).



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

2. Install a connector for your browser of choice (*Chrome, Firefox or Safari – NOT Microsoft browsers*).

Restart your browser.

Mac users: note that while *Safari* is an option there are functionality issues resulting in more complex processes to download many scholarly items. *Chrome* or *Firefox* are to be preferred.

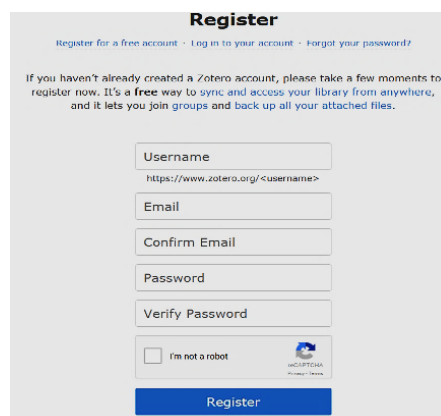


Create & Sync your Zotero Account

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.



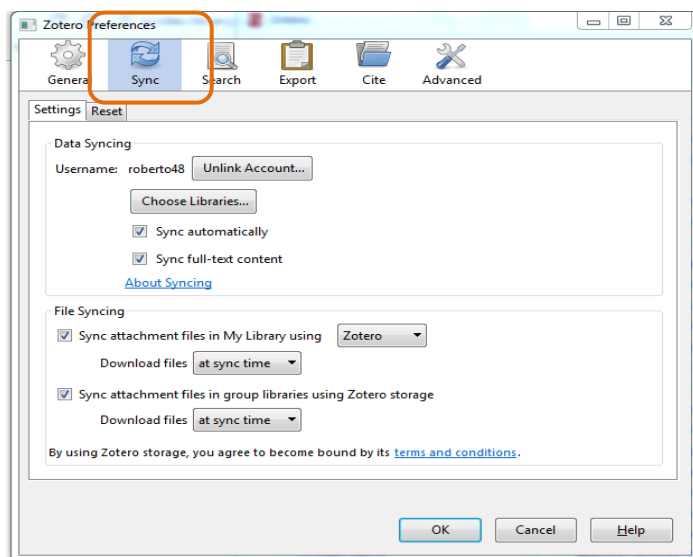
Configure your Preferences

Open the Zotero application

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

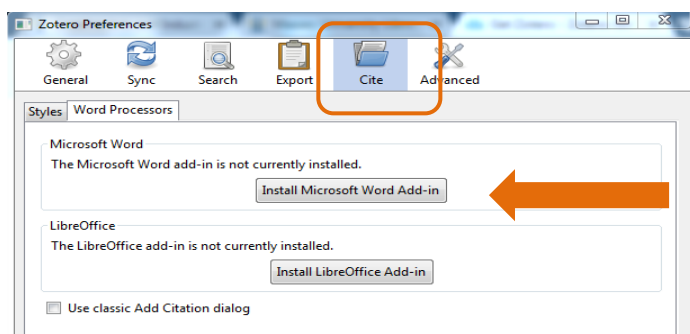
1. Enter your details in the Sync tab

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



2. Install and activate the word processor plugin

With Zotero 5.0 Standalone 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** tab and click on **Install Microsoft Word Add-in** to get the latest version. A restart may be required.

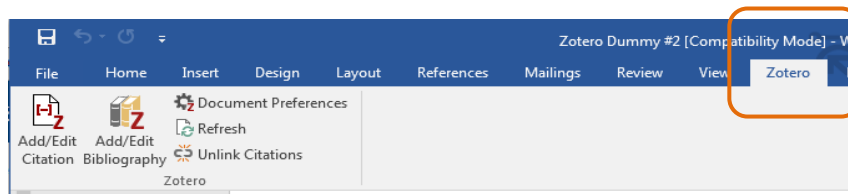


Next open *Word* to look for the Zotero **toolbar** – select Zotero tab:

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

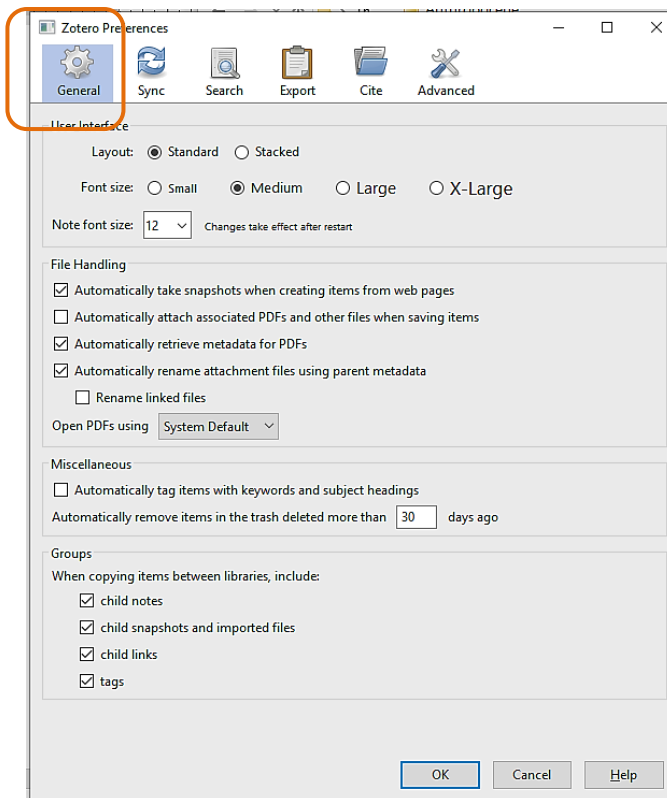
authenticate the plugin with your Google account. You can then begin inserting citations from your Zotero libraries just as you can with Word.

3. Configure general preferences

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

- To prevent Zotero from automatically importing subject headings from databases uncheck the box next to **Automatically tag items with keywords and subject headings**.
- If you store/attach all downloaded PDFs of articles you may reach your [free] Zotero storage limit (300MB). 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**.

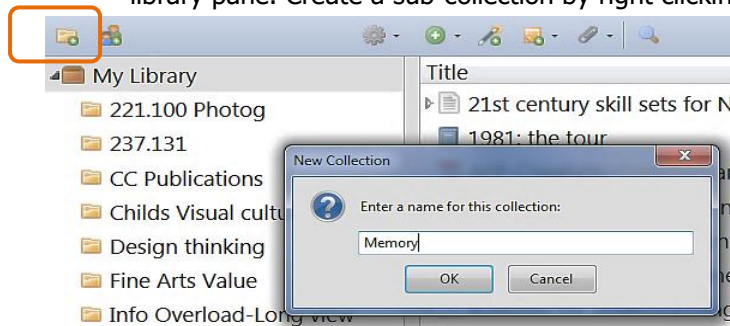
Alternatively, if you want to store PDFs in your Library but not reach storage limits, then leave this option checked, go back to the **Sync** tab and uncheck **Sync full-text content**. This will stop full-text PDFs attaching to your online Zotero storage sources (which has the 300MB limit), but not your Library on your own device.



Adding Items to your Zotero Library

Create Collections

Zotero can organize your research sources into folders termed 'collections'. You can add a source to any number of collections or 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.



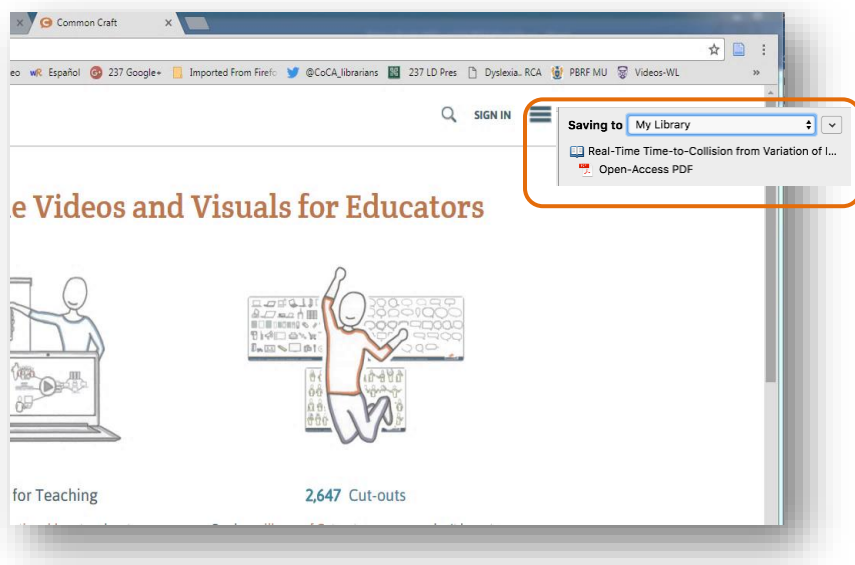
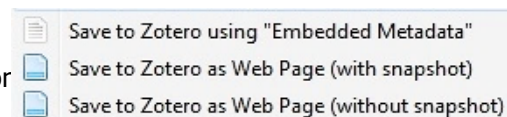
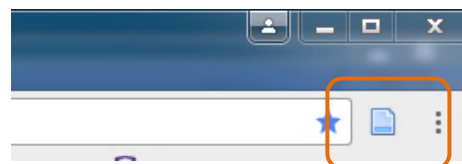
When a collection is open any items you save will automatically be filed into that collection. All items added to collections are also automatically added to **My Library**.

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.

If more than one option, choose the richest (generally "...metadata"). For many websites the data will be thin and a snapshot is the only option



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). If this fails, click the *Export* link on the right, then send it to Zotero by clicking the *Save* button. Use the RIS Format option - usually the default selection.

Clones, Fakes and Posthumans : Cultures of Replication

Series: [Thamyris /Intersecting: Place, Sex and Race](#)

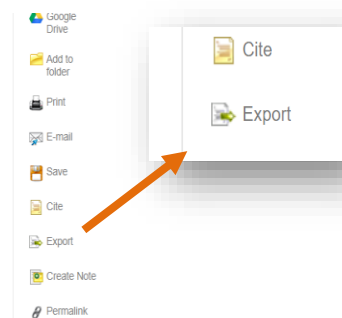
Authors: [Essed, Philomena](#)

Publication Information: Amsterdam : Brill | Rodopi. 2012

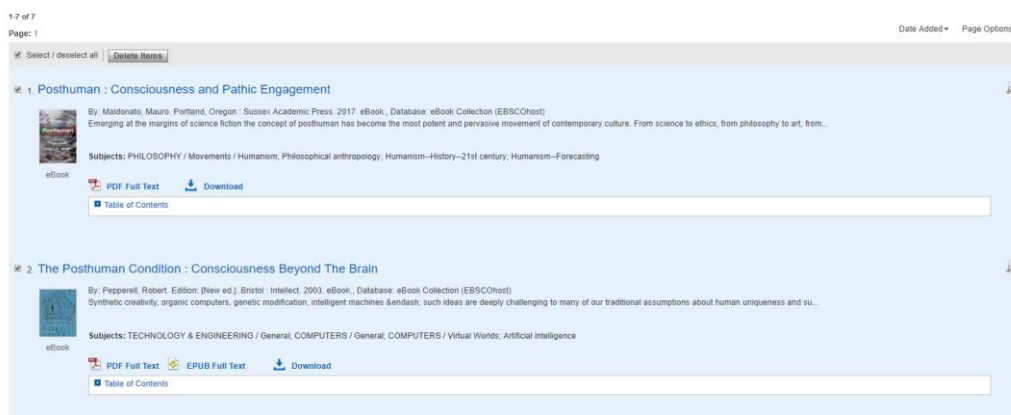
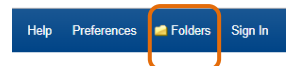
Resource Type: eBook

Description: Clones, Fakes and **Posthumans**: Cultures of Replication explores cloning and related phenomena that inform each other, like twins, fakes, replica, or homogenities, through a cultural prism. What could it mean to think of a cloning mentality? Could it be that a 'cloning culture' has made biotechnological cloning desirable in the first place, and vice versa that biotechnological cloning then enforces technologies of social and cultural cloning? What does it mean to say that a culture replicates? If biotechnological cloning has to do with choice and repetitive reproduction of selected characteristics, how are those kinds of desires expressed socially, politically and culturally? Lifting the issue of cloning above the biotechnological domain, we problematize the cultural context, including modernity's readiness to imitate and manipulate nature, and the skewed privileging of desirable socialities as a basis for exclusive replication. We also explore possible relations between a cloning mentality and a consumer society that fosters a brand-name mentality. The construction and (coercive) implementation of copy-prone technological and symbolic items are at the very heart of the consumer society and its modes of mass production as they have emerged from and seek to articulate, define, and refine modernity and modernization.

Subjects: [Culture](#)

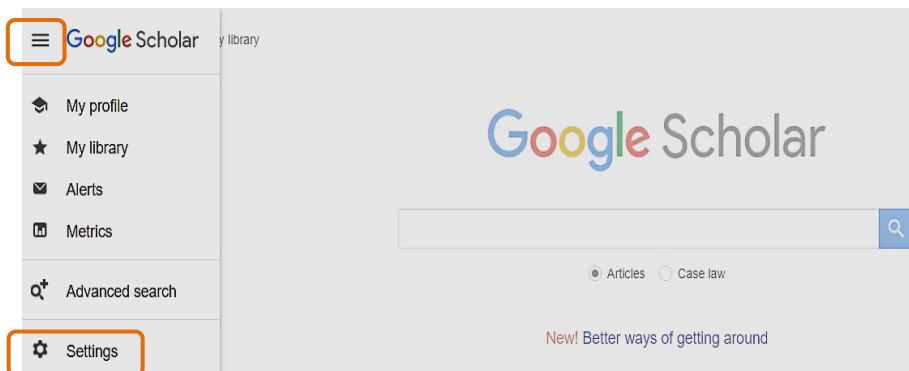


To save multiple items from a search result list select them using the folder icon to the right of a record in the result list. When done click the *Folders* icon in the blue bar top of the page and you'll see a list of saved sources. Select all or individual items as required and then send them to Zotero using the *Export* > Save process as above.



Google Scholar

To export items from Google Scholar you'll need to amend the *Settings* the first time you use it with Zotero.



Go to **Bibliography Manager** in **Settings** and select **Show links to import citations**, then **EndNote** from the drop down options (EndNote uses the same RIS export format).

An *Import into Endnote* link will then appear beneath every result item. Simply click this link to save the data for any source to Zotero.



[PDF] yimg.com

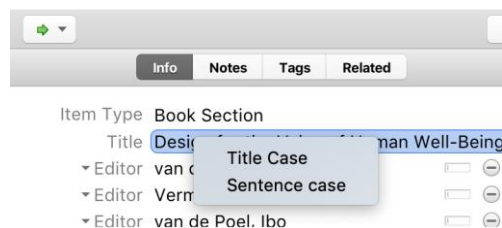
[PDF] sheltonography.com
MasseyLink

[PDF] tandfonline.com
MasseyLink

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.

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**.

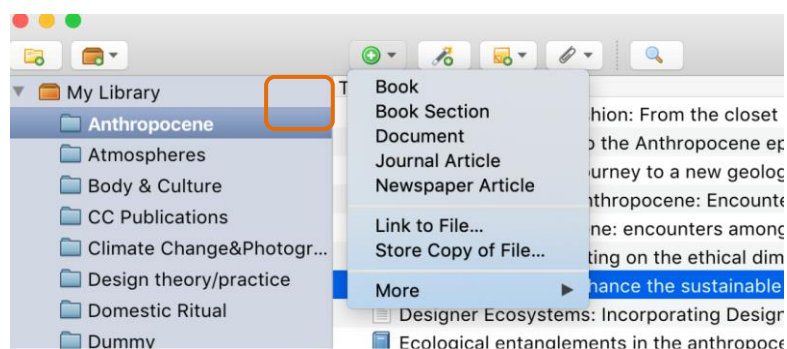


Other fields can be edited by clicking on the field. A blank box will appear for you to type in additional information or edits like the full first name of an author.



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.

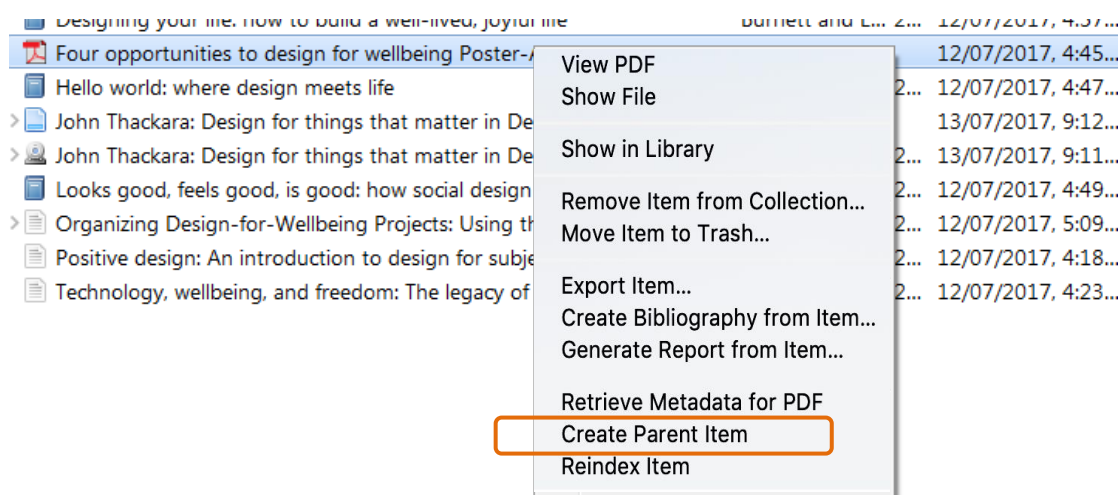
A screenshot of the 'New Item' form in Zotero. The form is titled 'Item Type: Book Section' and contains fields for Title, Author, Abstract, Book Title, Series, Series Number, Volume, # of Volumes, Edition, Place, Publisher, Date, and Pages. The 'Author' field is highlighted with an orange box.

Saving PDFs

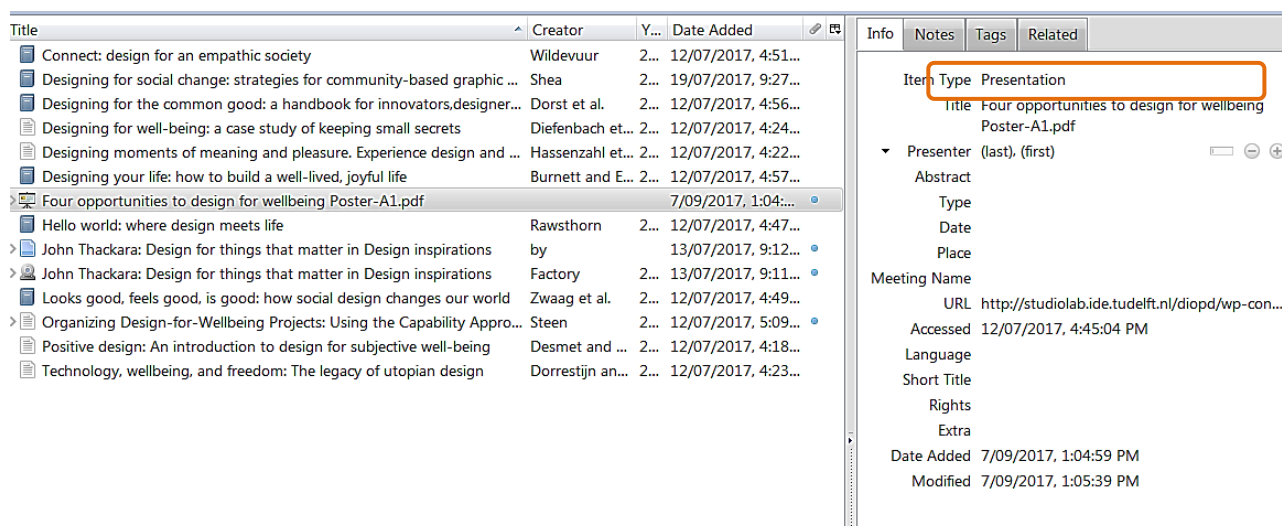
If selected in the *Preferences* [see p. 3] Zotero will automatically download the PDF Full Text if it's available from the resource/database. You can also save pdfs already on your computer to Zotero by dragging and dropping them into a collection. To prevent hitting the storage limit for the free version, go to *Preferences* > **Sync tab** and uncheck **Sync full-text content**. This will stop full-text PDFs attaching to your online ('cloud') Zotero storage sources (which has the 300MB limit), but not the Library on your own device.

In 2019 Zotero introduced a new PDF feature that automatically inserts an entry by extracting data about a source whenever you add one to your Library – whether by saving it or dragging it in. 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.

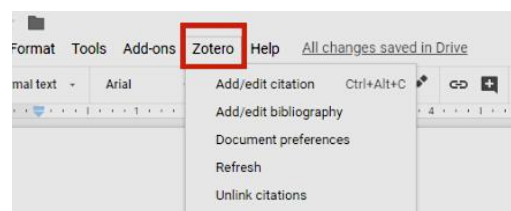


Creating Citations & Bibliographies from Zotero

The following refers to working with *MS Word* docs (Mac or Windows); *Open Office* works similarly. As of Oct 2018 Zotero also offers *Google Docs* integration. Look: [here](#) for full detail ... or (in brief) as follows:

Using Zotero with Google Docs.

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



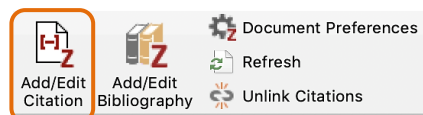
To add a citation to your document, select "Add/edit citation" from the menu or click on the Z button in the Google Docs toolbar (far right). Choose your citation style as prompted and then add citations and create bibliographies as described for MS Word following. Note though there are some limitations:

- Citation inserts and edits slow down significantly as the number of citations increases – you may want to disable automatic citation updates in the Zotero document preferences.
- You can't copy active 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>.

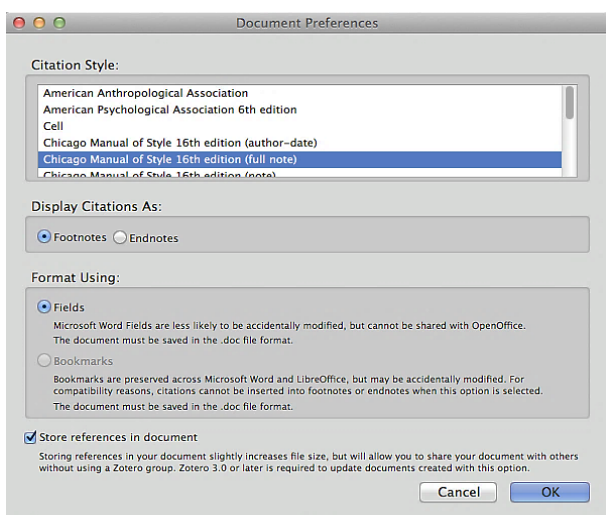
Inserting Citations

NOTE: the following uses the *Quick Format* bar mode of insertion and editing, not the *Classic View* dialog box. If the Zotero tab is not showing then go to the [Zotero site documentation](#) for guidance.

Place your cursor where you'd like to add a citation in the text and click **Add/Edit Citation** :



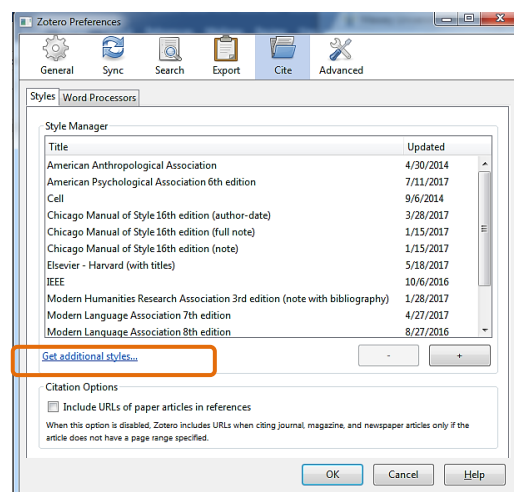
Select a Citation Style



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 6th edition** or **MLA 8th edition**.

you'll need to click on **Cancel** and go to Zotero's **Preferences**. Under **Cite** select **Styles**. Click on **Get additional Styles...**

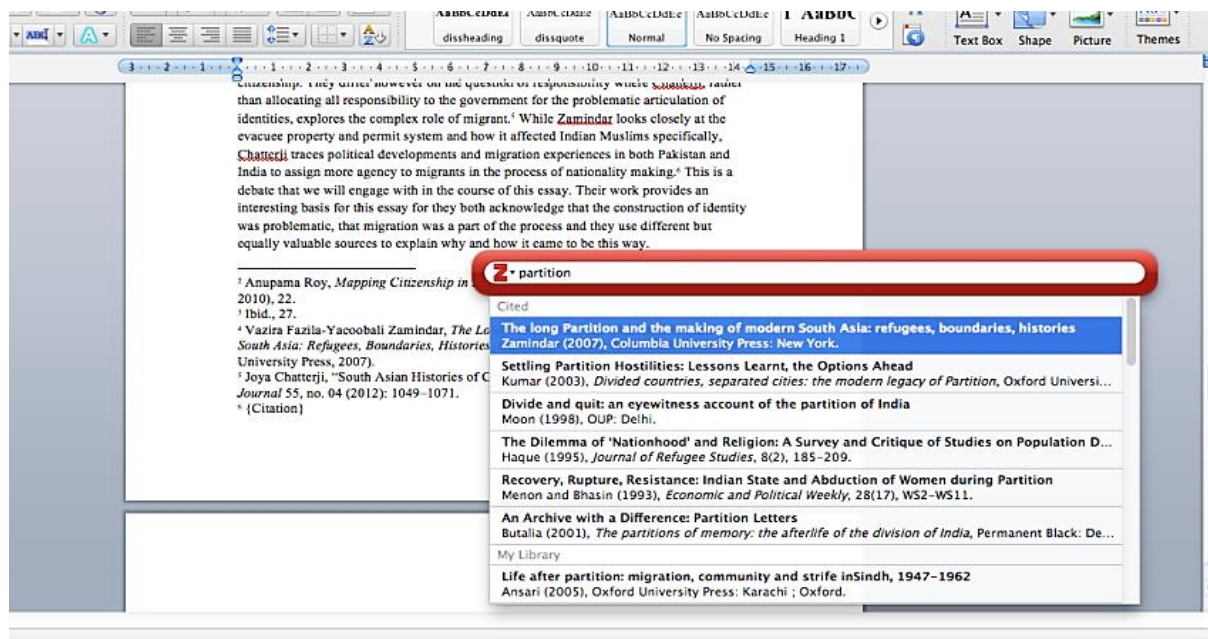
Find the style you want and click on the title. Click on **Install**. This



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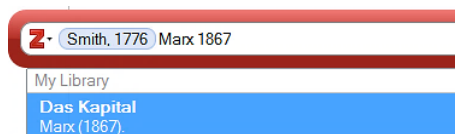
style will now be listed when you go back into Word to install the first citation.

Once the style is selected a red Zotero *Quick Format* search bar should open. **Enter a key word** from the source title or author you want to insert and 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.

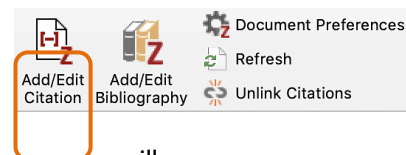
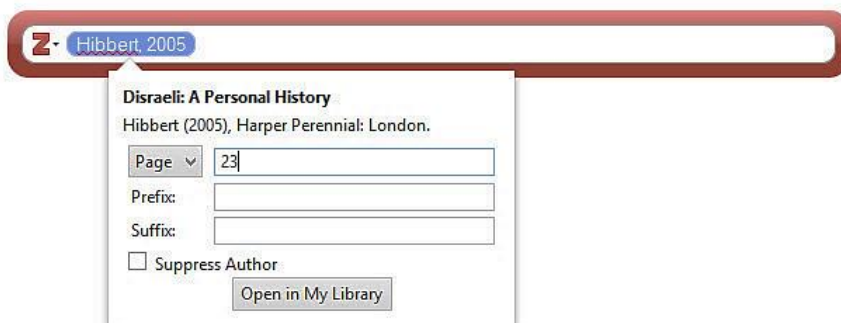


Editing Citations

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. After you have updated any citations, use the **Zotero Refresh** button on the toolbar to update your document.

To **edit** in-text, 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 and then press enter twice.

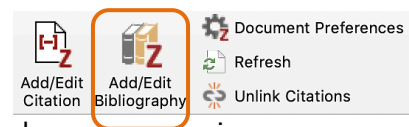
To **delete** a citation

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

Creating References and Bibliographies

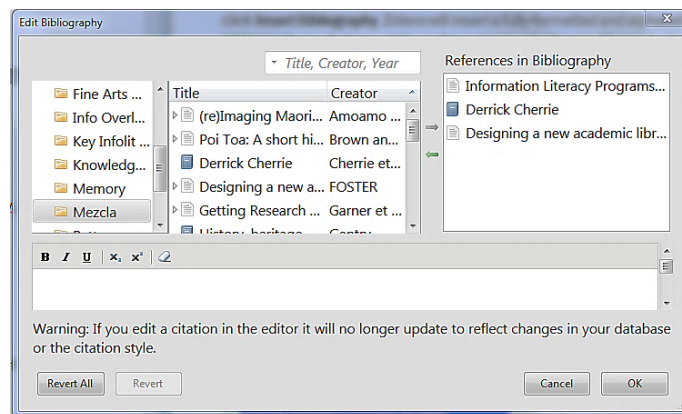
When you have added a few citations, position your cursor at the end of the doc then click **Add/Edit Bibliography**. Zotero will insert a fully-formatted and alphabetized bibliography in whatever style you have previously chosen.

All in-text cites added from now on will be automatically added to the bibliography in alphabetical order.



in

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, or remove cited items from the bibliography.



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.

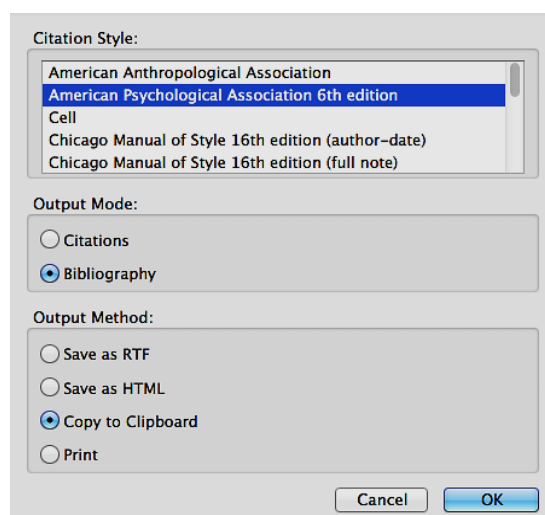
To copy an **in-text citation** instead of a reference, hold down the **Shift** key and drag.

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].



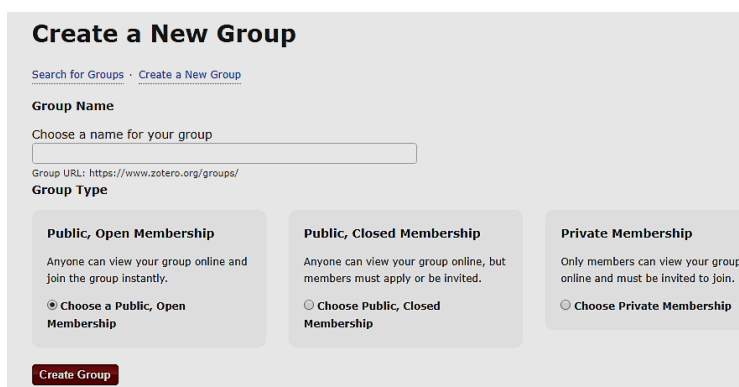
Group Libraries

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) then this will become an issue (300MB limit). You may need to purchase additional storage space [For a small 'lab' group this will be a modest annual subscription cost see [here](#)). To continue with the 'free' service you will have to limit sharing to references only unless the number of sources are small.

Setting up Groups

To set up a group library, go to the upper left-hand corner of the Zotero tool bar and click the **New Library** drop-down menu, then select

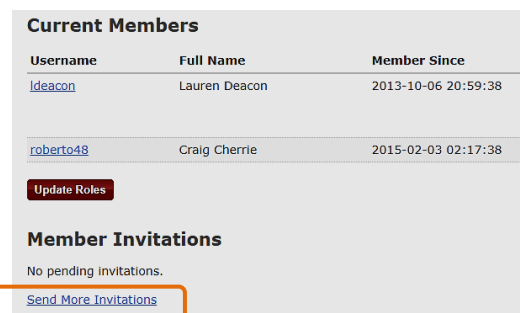
New Group. This option will take you to the Zotero website for new groups. If not already logged into your Zotero account, you'll be prompted to. On the *Create a New Group* page enter your **Group Name** then select the **Group Type**. If you want to invite only known people choose *Private membership*. Click the **Create Group** button.



This page offers options to change the permissions level to allow members to do more or less editing.

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). Invited members just need to click on the link in the email they receive from Zotero, and they'll be added to the group.

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



Username	Full Name	Member Since
Ideacon	Lauren Deacon	2013-10-06 20:59:38
roberto48	Craig Cherrle	2015-02-03 02:17:38

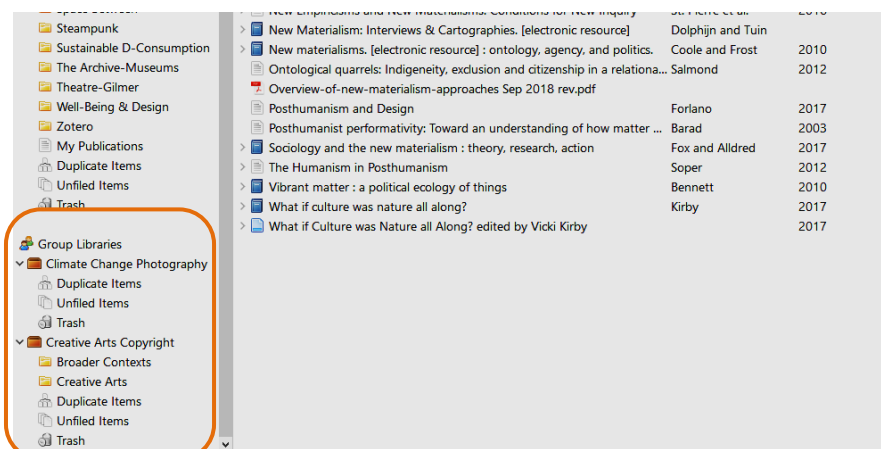
[Update Roles](#)

Member Invitations

No pending invitations.

[Send More Invitations](#)

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.



You can 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.

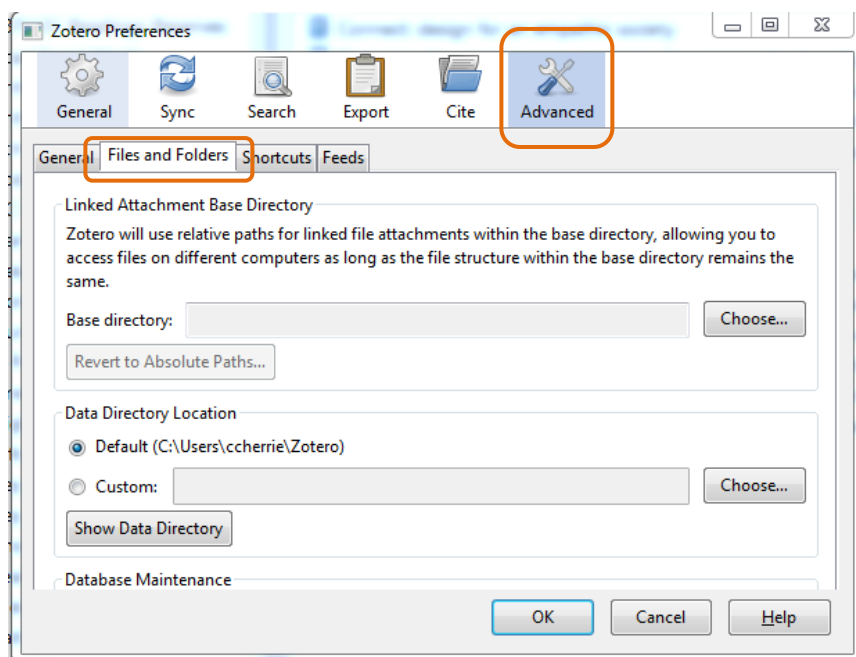
Backing Up your Zotero Library

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**.



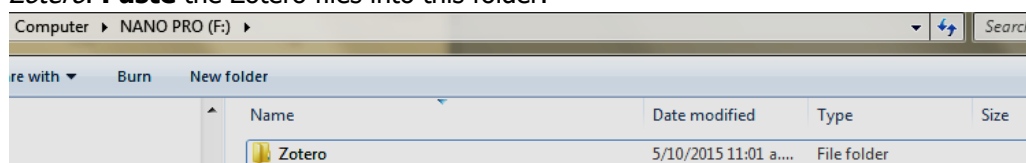
The Zotero directory on your computer will show.

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.

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 2019.

Further Guidance

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

or email library@massey.ac.nz