

## Zotero 101

### Introduction

*Zotero is a Firefox extension that captures, stores, and organizes a variety of information resources. It is a digital equivalent to the 3 x 5 note card. It is available for free from the Zotero website.*

*Zotero allows users to:*

*easily manage bibliographic data;  
add notes and highlight important information in digital form;  
insert citations and bibliographies into Microsoft Word or Open Office documents, using a number of citation styles; and  
create and export bibliographies from your bibliographic data in numerous styles.*

### Getting Started: how to get your information into Zotero

*Download Zotero and install it, following the directions on the Zotero website, <http://www.zotero.org> . To start Zotero, open your Firefox browser, then click on the Zotero icon in the bottom right corner of the browser window.*

### Adding records from the web

*Whenever Zotero recognizes a source on a web page you view, it will display a “save icon” in the address bar of your Firefox browser. The icon changes, depending on the type of source Zotero detects, and whether it detects one or more sources on that page.*

- 1. To add the item to your Zotero library, click on the icon. If there are multiple items, Zotero will display a dialog box, asking you to choose which items you wish to save.*
- 2. View the item in Zotero to check that all information appears correctly. If you wish to create your own controlled vocabulary, this is a good time to add those tags to the record.*
- 3. This process is the same for a library catalog, an academic database, or a newspaper or blog.*

### Adding an “archive” of a web page

*You may find it helpful as you do research to archive web pages of particular value, especially since there is no guarantee that it will still say tomorrow what it says today. Zotero allows users to create a snapshot of the web page, and store*

*that snapshot on their computer. It will also create a record for that item, so that you can cite the page in your work.*

- 1. When you are on a page you wish to archive, click the “Create new item from current page” icon in your Zotero toolbar.*
- 2. Check the “Info” tab to make certain you have any available, pertinent, bibliographic data.*
- 3. Click “View Snapshot” any time you wish to view the archived version of the page.*
- 4. If you wish to make notes or highlight on your archived page, use the tools that appear at the top of the window with the archived page.*

#### **Adding notes**

- 1. You can attach a note to a specific item, by clicking the Notes tab for that item, and then clicking Add.*
- 2. You can create a stand-alone note, or a note related to multiple items.*
  - a. Click the “New Standalone Note” icon in the Zotero toolbar.*
  - b. Type your information in the window that opens in the right Zotero pane.*
  - c. If you wish to relate this note to an item, click “Related” then choose the item from the list. Repeat if you wish to connect the note with multiple items.*

#### **Using Zotero with Microsoft Word or Open Office**

*Zotero has a feature that lets you use Zotero with either Microsoft Word or Open Office to cite sources and build bibliographies.*

#### **Insert a citation with one or more sources**

- 1. At the point in your paper you need to insert a citation to your source(s), click on the “Insert Citation” icon in your Zotero toolbar in Word.*
- 2. The first citation in the paper will ask you to choose a citation style. Pick the one your professor wants you to use, then click OK.*
- 3. Choose the source you wish to cite. If you want to cite multiple sources together, click “Multiple Sources” and then select the sources you wish to cite.*
- 4. Add any additional citation information, such as page number, then click OK.*

#### **Edit a citation**

*If you need to modify a citation after you have already inserted it, select the citation, then click the “Edit Citation” icon on the Zotero toolbar in Word. Make any changes you need to make, then click OK. If the information shows up incorrectly because it is wrong in your Zotero library, go into Zotero, make the changes, then follow the steps to refresh your document.*

### Insert a bibliography

*At any time while you are writing your paper, you can start building your bibliography.*

- 1. Go to the end of your document and insert a page break.*
- 2. On the new page, click the “Insert Bibliography” icon in the Zotero toolbar in Word.*
- 3. Do not insert any pages after this point, do not modify your document after this point. Doing so will interfere with how Zotero works.*
- 4. If you wish to include something in your bibliography, but did not cite it in your paper, simply click the “Edit Bibliography” icon in the toolbar and add the items you wish to add to your bibliography.*

### Updating or “refreshing” to show changes

*If your document doesn’t show changes you made to your Zotero library, simply click the “Refresh” icon in the Zotero toolbar in Word.*

### Working on Multiple Machines

*Zotero is set up to work on one computer. If you need to work on multiple machines, you’ll need to take a couple of steps.*

- 1. Go to the preferences pane in Zotero and click “Advanced.”*
- 2. Change the Storage Location to a custom location; for ease of portability, you’ll probably want to choose a place on a USB storage device.*
- 3. Each time you work on a new machine, you will need to set the Storage Location to the folder on your USB device.*

### Need More Help?

*For more help with Zotero, try one of the following:*

*<http://www.zotero.org/support>*

*<http://infoguides.gmu.edu/citationmanagement>*

*the reference desk at one of the four University Libraries*