



Zotero 6

Quick Guide

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This Quick Guide was created using:

https://www.zotero.org/support/quick_start_guide

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The Basics

What is Zotero?

Zotero is a free reference management system: With it you can capture citations automatically; use pre-defined bibliographic styles; store PDFs, images, and webpages; take notes; search PDFs and notes; and cite your Zotero library in MS Word, LibreOffice or Google Docs.

How do I install Zotero?

Download Now

Zotero can be downloaded and installed from the Zotero download page <https://www.zotero.org/download>.

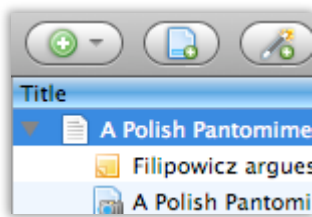
Be sure to install Zotero 5.0 as well as the Zotero Connector for your browser (Mozilla (Firefox), Chrome, Safari). For more details, see <https://www.zotero.org/support/installation>

How do I open Zotero?



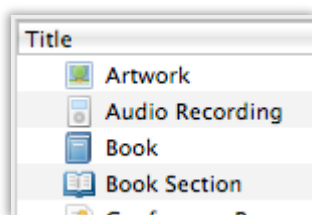
Zotero can be opened from your operating system's dock or file manager like any other program.

What does Zotero do?



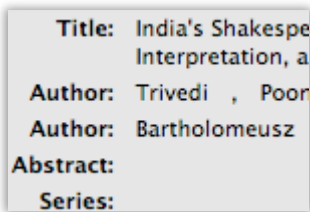
Zotero is, at the most basic level, a reference manager. It is designed to store, manage, and cite bibliographic references, such as books and articles. In Zotero, each of these references constitutes an item. More broadly, Zotero is a powerful tool for collecting and organizing research information and sources.

What kind of items are there?



Every item contains different metadata, depending on what type it is. Items can be everything from books, articles, and reports to web pages, artwork, films, letters, manuscripts, sound recordings, bills, cases, or statutes, among many others

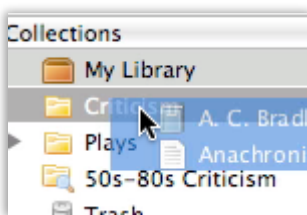
What can I do with items?




Items appear in Zotero's center pane. The metadata for that item is shown in the right pane. This includes titles, creators, publishers, dates, page numbers, and any other data needed to cite the item.

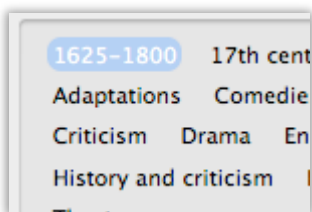
Organize

Collections



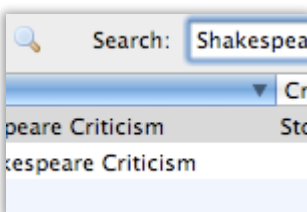
The left pane includes My Library, which contains all the items in your library. Right-click on „My Library” or click on the New Collection button ( above the left pane to create a new collection, a folder into which items relating to a specific project or topic can be placed. Think of collections like playlists in a music player: items in collections are aliases (or “links”) to a single copy of the item in your library. The same item can belong to many collections at one time.

Tags



Items can be assigned tags. Tags are named by the user. An item can be assigned as many tags as is needed. Tags are added or removed with the tag selector at the bottom of the left column or through the Tags tab of any item in the right column. Up to 9 tags can be assigned colors. Colored tags are readily visible in the item list and can be quickly added or removed using the number keys on your keyboard.

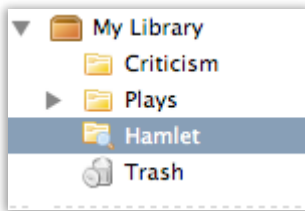
Searches



Quick searches show items whose metadata, tags, or content match the search terms and are performed from the Zotero toolbar. Clicking the spyglass icon to the left of the search box opens the Advanced Search window, allowing for more complex or narrow searches.



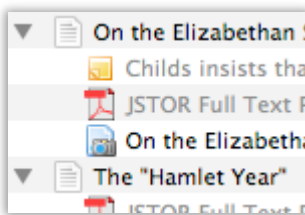
Saved Searches



Advanced searches can be saved in the left pane. They are similar to collections, but will update with new matching items automatically.

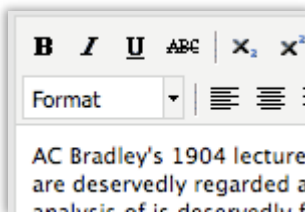
Collect

Attachments



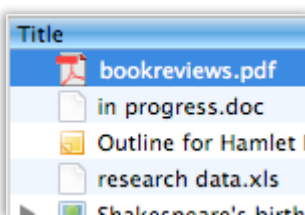
Items can have notes, files, and links attached to them. These attachments appear in the middle pane underneath their parent item. Attachments can be shown or hidden by clicking the arrow or plus sign next to their parent item.

Notes



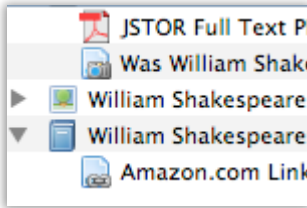
Rich-text notes can be attached to any item through the Notes tab in the right column. They can be edited in the right column or in their own window. Click the New Standalone Note button (📝) in the toolbar to create a note without attaching it to an item.

Files



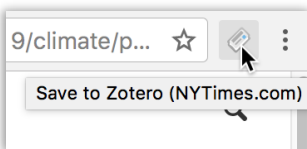
Any type of file can be attached to an item. Attach files with the Add Attachment button (📎) in the Zotero toolbar, by right-clicking on an existing item, or by drag-and-dropping. Files do not need to be attached to existing items. They can simply be added to your library. Files can also be downloaded automatically when you import items using the Zotero Connector in your browser.

Links & Snapshots



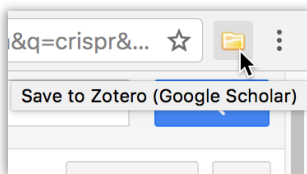
Web pages can be attached to any item as a link or a snapshot. A link simply opens the website online. Zotero can also save a snapshot of a web page. A snapshot is a locally stored copy of a web page in the same state as it was when it was saved. Snapshots are available without an internet connection.

Capturing Items



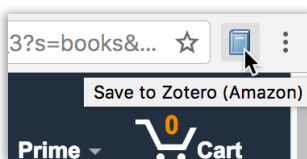
With the Zotero Connector for Chrome, Firefox, or Safari, it's simple to create new items from information available on the internet. With the click of a button, Zotero can automatically create an item of the appropriate type and populate the metadata fields, download a full-text PDF if available, and attach useful links (e.g., to the PubMed entry) or Supplemental Data files.

Single or Multiple Captures



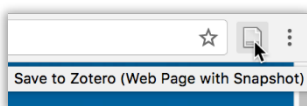
If the save icon is a book, article, image or other single item, clicking on it will add the item to the current collection in Zotero. If the save icon is a folder, the webpage contains multiple items. Clicking it will open a dialog box from which items can be selected and saved to Zotero.

Translators



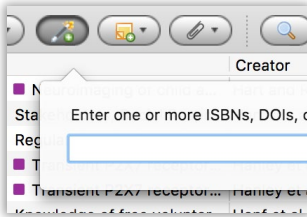
Zotero uses bits of code called translators to recognize information on webpages. There are generic translators which work with many sites and translators written for individual sites. If a site you're using does not have a translator, feel free to request one in the forums.

Saving a Web Page



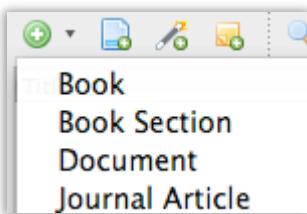
If the Zotero Connector does not recognize data on the page, you can still click the save button in the browser toolbar to save the page as a Web Page item with an attached snapshot. While this will save basic metadata (title, URL, access date), you may need to fill in additional metadata from the page by hand.

Add Item by Identifier



Zotero can add items automatically using ISBN number, Digital Object Identifier (DOI), or PubMed ID. This is done by clicking the Add Item by Identifier button in the Zotero toolbar, typing in the ID number and clicking OK. You can even paste or enter (press Shift+Enter for a larger box) a list of such identifiers at once.

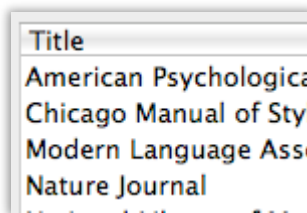
Manually Adding Items



Items can be added manually by clicking the green New Item (+) button in the Zotero toolbar, then selecting the appropriate item type. Metadata can then be added by hand in the right-hand pane. Apart from the versatility this provides, it is important for adding primary documents.

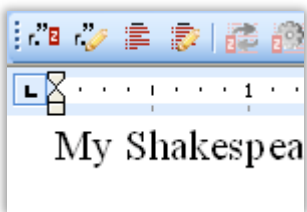
Cite

Citing Items



Zotero uses Citation Style Language (CSL) to properly format citations in many different bibliographic styles. Zotero supports all the major styles (Chicago, MLA, APA, Vancouver, etc.) as well as the specific styles for over 9,500 journals and publishers.

Word Processor Integration

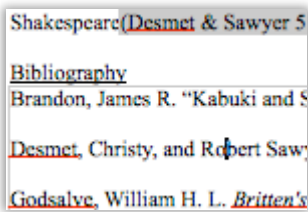


Zotero's Word and LibreOffice plugins allow users to insert citations directly from their word processing software. This makes citing multiple pages, sources, or otherwise customizing citations a breeze. In-text citations, footnotes and endnotes are all supported.

Zotero can also be used with Google Docs. Google Docs support is part of the Zotero Connector for Chrome and Firefox and requires the Zotero program to function. (For further information on Google Docs integration, see https://www.zotero.org/support/google_docs)



Automatic Bibliographies



Using the word processor plugins makes it possible to automatically generate a bibliography from the items cited and to switch citation styles for the entire document with the click of a button.

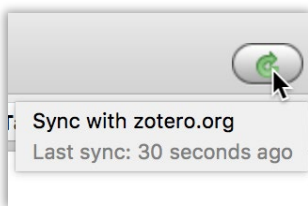
Manual Bibliographies



Zotero can insert citations and bibliographies into any text field or program. Simply drag-and-drop items, use Quick Copy to send citations to the clipboard, or export them directly to a file.

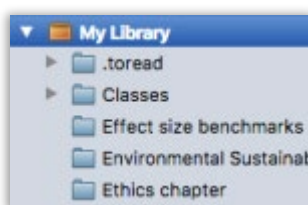
Collaborate

Syncing



Use Zotero at multiple computers with syncing. Library items are synced through the Zotero servers (unlimited storage for references), while attachment syncing can use the Zotero servers (free 300 MB) or your own WebDAV service to sync files such as PDFs, images or audio/video.

Zotero Servers

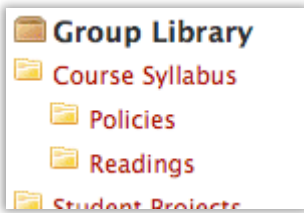


Items synced to the Zotero servers can be accessed online through your zotero.org account. Share your library with others or create a custom C.V. from selected items.

Make copies of your research readily available on zotero.org for readers, the public, and other researchers using "My Publications".



Groups



Zotero users can create collaborative or interest groups. Shared group libraries make it possible to collaboratively manage research sources and materials, both online and through the Zotero client. Zotero.org can be the hub of all your project group's research, communication and organization.

PDF-Reader and Zotero Notes

Double-clicking a reference in Zotero or a PDF file attachment opens another tab in Zotero with the PDF reader.

In the reader, standard highlighting and note functions for PDF editing are available in the center part of the three-part view (highlight, note, select area, highlight color).

In the left column of the reader you can see the passages you marked and your notes in the text as annotations. You can further edit, annotate, and add tags here.

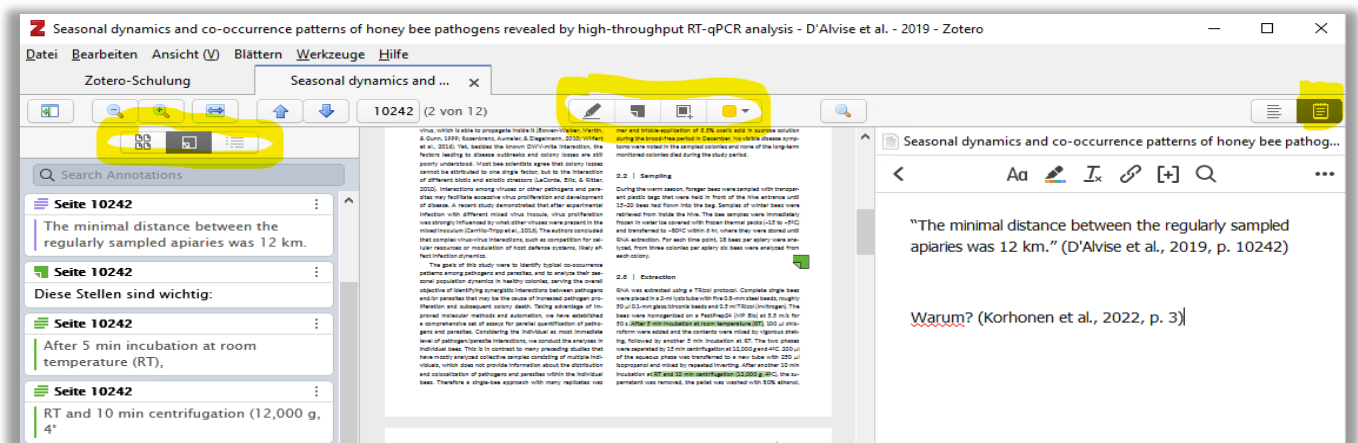
Alternatively, you can also preview the PDF pages or – if available - view a table of contents in the left column.

The right column of the reader has the same tabs as in the Zotero database: Info, Tags and Related.

You can get to the Zotero notes by clicking on the notepad icon in the upper right corner:

You then have the option to create notes related to the open PDF (Item Notes) or standalone notes: via the "plus" icon either next to "Item Notes" (subordinate note to the open PDF) or next to "All Notes" (standalone note).

The annotations of the left column can be added to any note by drag&drop (open desired note before).



In the note editor (right column after selecting a note) you have various editing options for the note text: Aa [color] [text color] [link] [plus] [search]

Using the **[+]** icon, you can, for example, add further references from your database to the note as a citation using the same citation dialog as in Word.

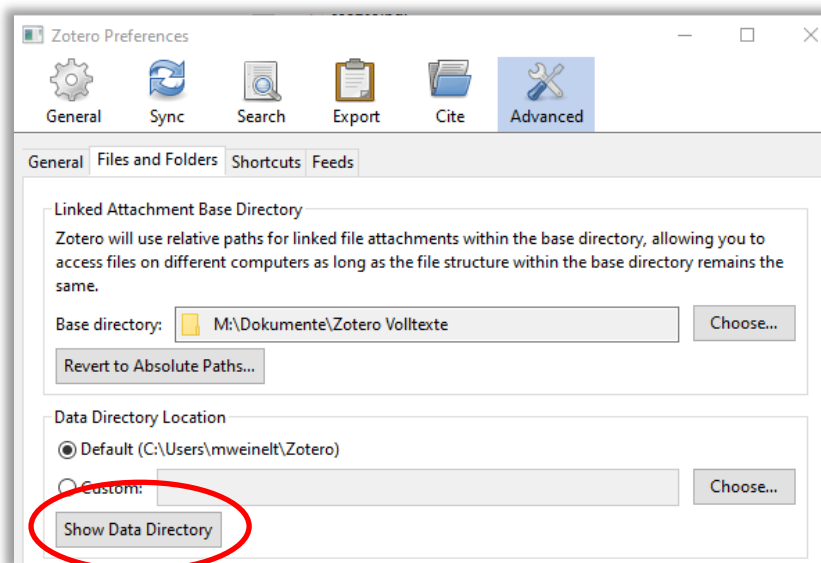
When writing your work in Word, LibreOffice or GoogleDocs, you can then automatically insert the texts, images and references from your notes into your document at the click of a button

Backup

You should create a backup copy of your Zotero library on a regular basis.

Creating backup copies

To create a backup copy, create a copy of the Zotero folder. The fastest way to get to the file storage location of Zotero is via the Files and Folders tab in the advanced preferences. (Edit (Mac: Zotero) → Preferences → Advanced → Files and Folders)



Use the Show Data Directory button to find to the exact location. The default setting is the Firefox profile directory. Alternatively, you can define your own file storage location under Custom.

After locating your Zotero library, close Zotero, and copy your Zotero data directory to a backup location (copy the entire directory, including “storage” and the other subdirectories).

Restoring your Zotero library from backup

If you were not using Zotero syncing (or were but don't want to perform a full sync) and have a backup of your Zotero data directory, you can restore your library by replacing the contents of your active data directory with that of your backed-up data directory.

Open the Advanced pane of the Zotero preferences and click “Show Data Directory”. This should reveal your active data directory containing zotero.sqlite and possibly a 'storage' subdirectory. Close Zotero and move zotero.sqlite and 'storage' from this



folder into a temporary folder on your desktop. Next, copy zotero.sqlite and 'storage' from your backup into the active data directory. When you now reopen Zotero, your Zotero library should be restored.

Once you've successfully restored your data, you can delete the temporary folder on your desktop.

Note that, if you were using Zotero syncing, any changes you made to your library since the backup and subsequently synced to the Zotero server will be applied to your restored database as soon as you sync.

Questions and request for changes?

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