GETTING STARTED WITH ZOTERO

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In this video we'll show you how to get started using Zotero, a tool that helps you manage your research and citations.

First, you'll need to go to the Zotero web site at zotero.org and download two things: the software and a plug-in for your browser.

It also helps create an account, which allows you to sync with the web so you have a backup and can access your data on multiple computers.

Once you've done this, open your downloaded software and enter your account information in the program preferences.

Adding Citations

You'll see that your library is empty. In Zotero, you add citations mainly by browsing the web.

When you are on a web page with a record you want to save to Zotero, click on the Zotero icon in your browser bar. Here's an example of a book from the Laurier Library catalogue. When I click the Zotero icon, the book gets added to my Zotero library.

The Zotero icon looks different depending on the format of the source. In this case, it looks like a folder because there are a lot of items on the page. When you click on the folder icon, you get a list of all the items and can select all of them or check just some of them.

Zotero works well with non-scholarly formats too, like videos or web pages. Again, the icon looks a bit different for these formats.

If I go back to my Zotero software, I can see that all the examples I just showed have been added.

The citations show up in the middle section, and if I select one the citation details are displayed on the right.

Make sure you always check this information, edit anything that isn't correct, and add any information that's missing, so mistakes don't carry though into your citations later.

You can also add citations to Zotero manually, by clicking on the plus icon above your citations and choosing the type of source it is, then entering the information.

If you know the ISBN or DOI of the source, adding manually is easy. Click on the wand icon, enter the number, and Zotero will find the citation information for you and add it.

Organizing Research and Citations

Once your citations are in Zotero, you can attach files if you like, so your files and citations are all in one place. Click on the paperclip icon and choose whether to attach a url or file. Please note that the free version of Zotero has a size limit on storage, so if you want to attach a large number of files check zotero.org to see how you can best avoid those limits.

Once you have attached files, you can do all your reading and notetaking within Zotero. Click on the title of a file you've attached to view it. Here you can highlight or add notes, which are searchable. This helps you keep all your citations, files, and notes in one spot.

On the right, you can click on the Tags tab for your record to add tags or key words. This is a helpful way to organize your citations by theme so they are easily searchable that way.

You can also add notes that are attached to specific citations. Click on the sticky note icon and choose the type of note you want, then enter the note text. Notes you make on a specific source will show up under its citation.

To organize your citations, create folders by clicking on the folder icon. You can drag and drop citations into folders.

You can always see all your citations by clicking on Library, or search for citations using the search box.

Using Citations in Word

Those are the basics of adding and organizing your citations in Zotero.

At some point, you'll want to use them in your writing. One of the best ways to do this is to use MS Word, on either a PC or Mac.

When you install Zotero a plugin is installed in Word, so you can connect to your Zotero library from within Word. You'll see a Zotero tab in the top ribbon.

To add a citation, put your cursor where you want it to be and then click on the Add/Edit citation button in the Zotero tab. The first time you do this, you'll be asked to choose a citation style for this document, such as APA. Then you'll see a Zotero box appear, where you search for the citation you want. Once you've selected it, in- text citation information appears in your document in the style you chose.

When you're finished writing and inserting citations, put your cursor where you want your bibliography to appear and click on the Add/Edit Bibliography button. A bibliography or list of references will appear with the citations to all the sources you added in-text.

Questions & Help

If you have any questions, ask us at library.wlu.ca/help/askus.