



Using Zotero: a quick guide

This is a quick guide to Zotero. There are many other functions and options available which are not included here. For more information go to <https://www.zotero.org/support>

What is Zotero?

Zotero is a bibliographic software package which allows you to:

- Import references from databases
- Import saved PDFs to create references
- Add correctly formatted citations to Word documents
- Build a bibliography
- Share references with a defined group

How do I register?

Zotero offers a free and two-paid for versions. For most users the free version provides adequate storage and functionality.

To register go to <https://www.zotero.org>.

Zotero has a web and a desktop interface; to access all the functions of Zotero you will need to use both.

PCs in the Library and PC clusters in College have Zotero desktop installed. You can access it via the **Software Hub**.

To download Zotero desktop onto your own machine click on the **Download** button and follow the installation instructions.

Syncing between your desktop and web accounts

Setting up account syncing between your desktop and web versions is **really important**. If you don't do this, and don't use it, then you may lose references you have added when you log off

To set this up on the desktop version:

- go to the **Edit** tab, and then choose **Preferences**
- On the **Sync** tab of the popup window, enter your Zotero username and password and click **Set Up Syncing**

It is good practice to regularly sync when using Zotero, and you can do so by clicking on the round green arrow in the top right of the program window. If you are using a College PC, make sure to enter your Zotero username and password in the Sync tab every you sign on to the computer, or your references will not save.

How do I add references to my account?

There are various way to do this:

1. Import using the web importer Zotero Connector
2. Import saved PDFs to generate references
3. Add references manually
4. Import references from a file
5. Adding references by identifier

1. Import references using the web importer bookmarklet

Zotero Connector allows you to import references from a range of resources including Web of Science, Scopus, PubMed and Google Scholar.

To install the bookmarklet in your browser:

From the Zotero website:

- Click the **Download** link on the homepage
- Click the **Install Browser Connector** link
- Follow the instructions to install the Web Importer

To import references into Zotero:

- Conduct a search in your chosen resource
- From the **Results** screen click on **Zotero Connector** in your toolbar
- A box will appear containing a summary of all the references on the screen
- Select the ones you want to import by ticking the relevant boxes or choose **Select All**
- To view these references in Zotero desktop hit the **Sync** button
- To view in Zotero web you may need to refresh your browser

2. Import saved PDFs to create references

If you have saved PDFs of journal articles you can drag and drop files, or folders into Zotero desktop. Articles will need to have a digital object identifier (DOI) in order for this to work. This will generate a reference for the article and also save a copy of the PDF in your Zotero library.

Please note that the free version of Zotero has a 300MB limit. There are paid for storage options, but Imperial unfortunately does not provide these.

3. Add references manually

- To add references manually click on the **File** tab, and then click on **New item**
- A drop down menu of item types will appear, and so you should select the relevant one, which will give you a blank template.
- Complete all the required fields (you may wish to refer to a guide for your chosen referencing style so you know what these are for each type of material) and hit the **Save** button

4. Importing references in a file

If you are searching a resource which is not compatible with the web importer you can save your references in a file and import into Zotero.

- Conduct a search in your chosen resource
- On the **Results** screen select the references you want to export
- Look for a Save/Export citations button
- Save the references in .RIS or.BibTeX format
- In Zotero click on the **File** tab and select **Import**
- Find your saved file and hit the **Open** button
- The saved references will now be imported into your Zotero library

5. Adding references by identifier

You can add references using identifiers such as an ISBN or a DOI. To do this, click the wand icon above the reference list.

A popup search bar will appear, into which you can copy the identifier. The reference will then be added to your library.

How do I organise and search my references?

You can organise your references by creating folders (called Collections) and adding tags to references.

Creating folders:

- Right click in the side navigation and click **New Collection**, and give the folder a name
- Drag and drop the references you want to add onto the folder name

Adding tags:

- First click on the reference to open it
- Click the **Tags** tab above the information above the reference
- Some imported references may already have tags added
- Click **Add**, and then type the text you want for your tag and press enter
- All the tags will appear in the bottom left of the browser, and you can filter by clicking on the tags

How can I annotate PDFs?

References with PDFs attached will have a blue dot in the column with a paperclip in. Open the PDF by double clicking somewhere in the row.

Once the PDF has opened, you will be able to annotate it by using the tools at the top of the page.

How do I create a reference list/bibliography?

Zotero can take the references in your library and insert them as citations in your Word document and generate a reference list in a variety of referencing styles. You can also use Zotero with Google Docs, but the instructions below are for Microsoft Word.

Zotero will be installed in the tabs across the top in Word when you download Zotero desktop. Zotero should automatically appear in Word

once you've downloaded the application from Zotero.org. If you're not seeing it in Word despite downloading the app then you may need to do a manual installation.

In Zotero go to Edit – Preferences – Cite and in the Word Processors tab there should be an option to install or reinstall the Word add -in. After doing this, close and re-open Word.

If you are using a College PC and do not see Zotero you may need to open Zotero desktop and go to the **Tools** menu, select **More** and check that the **Zotero Word for Windows** plugin is enabled.

In Word:

- Please your cursor where you want a citation to appear
- Click on **Add/Edit Citation** in the Zotero tab
- The first time you use this a popup may prompt you to choose which referencing style you are using. You can also change the style through the desktop app by clicking the **Edit** tab, selecting **Preferences**, choosing the **Cite** tab and selecting the one you one from the list, or looking for additional styles through **Get more styles**
- After clicking the **Add/Edit Citation** a search field will appear, and you can search for the details of the reference you want, before you select the correct reference from the list provided and press **Return** on your keyboard.
- When you've finished adding citations, place your cursor where you'd like your reference list to appear and click on **Add/Edit Bibliography**. This will generate a reference list in your selected style

How do I share references with other people?

With Zotero you can set up or join groups which allow you to share references and collaborate more easily.

Go to zotero.org/support/groups for more information.

How do I create a profile in Zotero?

In Zotero web you can create a profile which details your areas of interest. You can also upload your own publications to Zotero to allow other researchers to access them. Please check the publisher's copyright policies before doing this.

In Zotero web click on **Settings** in the top right corner. This allows you to update things including your **Profile** and **Privacy**.

How do I get help with Zotero?

- Online guides are available at <https://www.zotero.org/support/>
- Watch '[Easy Referencing with Zotero](#)' as part of [Imperial's suite of technology programs](#)
- You can also [contact your subject librarian](#) for further assistance or to book a one-to-one