

# Handbook: How to Use Zotero

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## Introduction

This handbook has been compiled to provide an introduction to Citation Managers for the benefit of our students and researchers.

Citation managers and word processor integration plugins are available for efficient documentation writes up. They allows quickand easy means for generating citations for academic reports, proposals and research papers.

The handbook uses the open source Citation Manager Zotero as an example. It details downloading, installing and using Zotero to store references generating bibliographies using Microsoft Word.

## How to Use this Handbook

This is a self-explanatory books form starting to end.

It's not meant to be read straight through, like a novel or a class curriculum; rather, is meant to be an active reference - a book you can flip through to find useful guidance on specific topics when you need to do the tasks discussed here.

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# 1. Zotero Citation Manager

## 1.1. What is a Citation Manager

A citation manager is also called a reference manager and bibliographic manager.

It is a citation database that you build – create lists of articles, books, reports, videos, webpages, etc.

- Software specially designed for students, scholars, and writers.
- Formats and generates bibliographies (reference lists) using the citation style you specify.
- Store, search and organize your research. Add notes, links, PDFs and other file types.

## 1.2. Features of Zotero Citation Manager

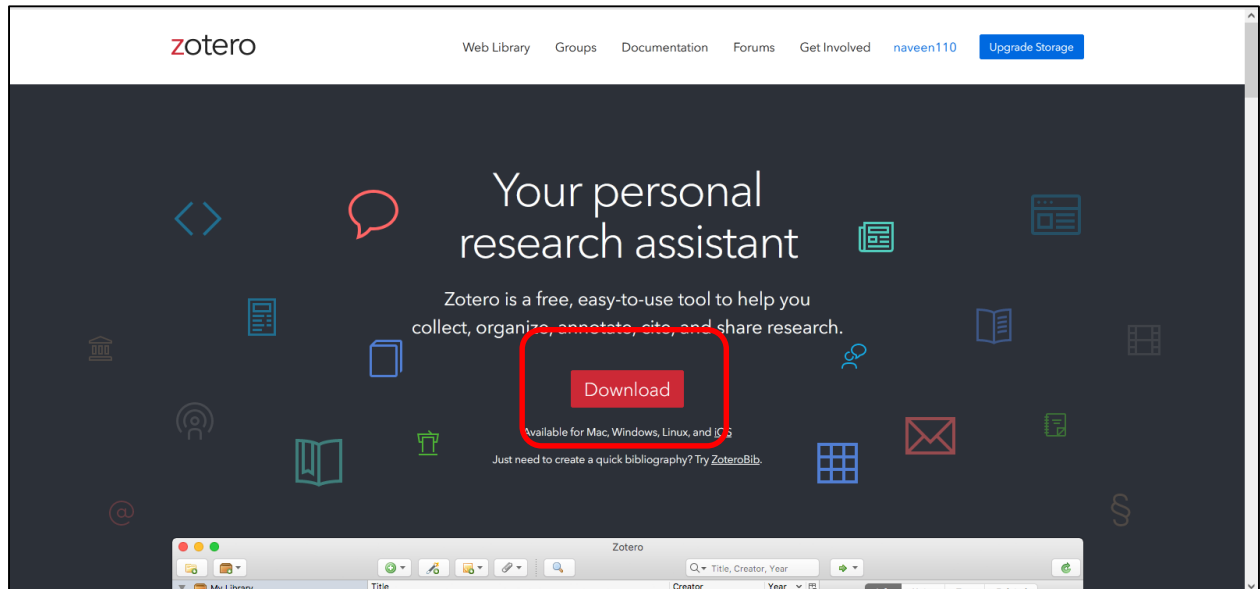
Zotero is a free, easy-to-use tool to help you collect, organize, annotate, cite, and share research. It is [open source](#) and developed by an independent, nonprofit organization.

Some features include:

- [Collect with a click](#). Automatically senses research as you browse the web.
- [Organize your way](#). Helps you organize your research any way you want. You can sort items into collections and tag them with keywords. Or create saved searches that automatically fill with relevant materials as you work.
- [Cite in style](#). Instantly creates references and bibliographies for any text editor, and directly inside Word, LibreOffice, and Google Docs. With support for over 10,000 citation styles, you can format your work to match any style guide or publication.
- [Stay in sync](#). Can optionally synchronize your data across devices, keeping your files, notes, and bibliographic records seamlessly up to date. If you decide to sync, you can also always access your research from any web browser.
- [Collaborate freely](#). Lets you co-write a paper with a colleague, distribute course materials to students, or build a collaborative bibliography. You can share a Zotero library with as many people you like, at no cost.

### 1.3. Download and Install Zotero Desktop Application

Download Desktop Application at <https://www.zotero.org/>



### 1.4. Install Zotero for Windows

Download and Install Zotero for Windows.



## 1.5. Install Zotero Connector (Optional)

Zotero Connectors are useful during literature search. They automatically sense content as you browse the web and allow you to save it to Zotero with a single click.

Connectors are available for popular browsers such as Firefox, Chrome, Edge, and Safari at <https://www.zotero.org/download/connectors>



The image shows a screenshot of the Zotero website's 'Connectors' page. The main heading is 'Install the Zotero Connector for Firefox', accompanied by the Firefox and Zotero logos. Below this, a blue 'Install' button is visible. To the left, there are icons for Chrome, Edge, and Safari, with a link to 'Show all connectors'. To the right, there is a link to 'Get Zotero' for Mac, Windows, and Linux. On the far right, a sidebar lists the connectors for Firefox, Edge, and Safari, each with its own 'Install' button.

**zotero** Log In - Register Upgrade Storage

Home Groups Documentation Forums Get Involved Search

Home > Connectors

 + 

### Install the Zotero Connector for Firefox

Zotero Connectors allow you to save to Zotero directly from your web browser.

    
Not the browser you're looking for?  
[Show all connectors](#)

[Install](#)

  
[Get Zotero](#)  
For Mac, Windows, and Linux

  
**Firefox connector**  
[Install](#)

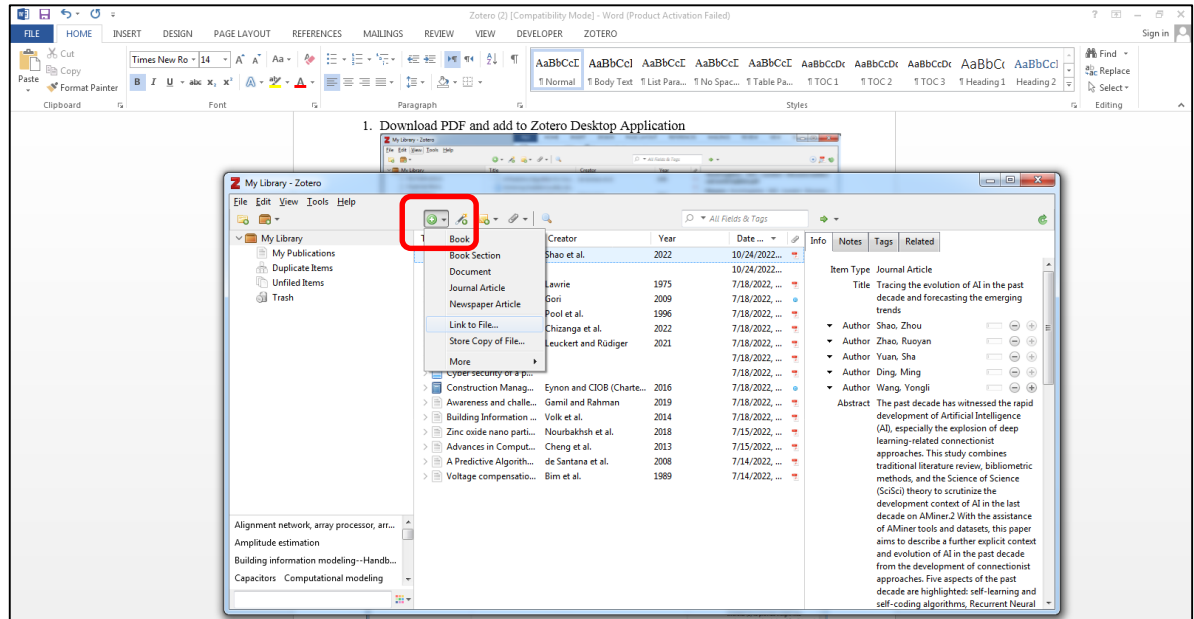
  
**Edge connector**  
[Install](#)

  
**Safari connector**

## 1.6. Adding References to Zotero

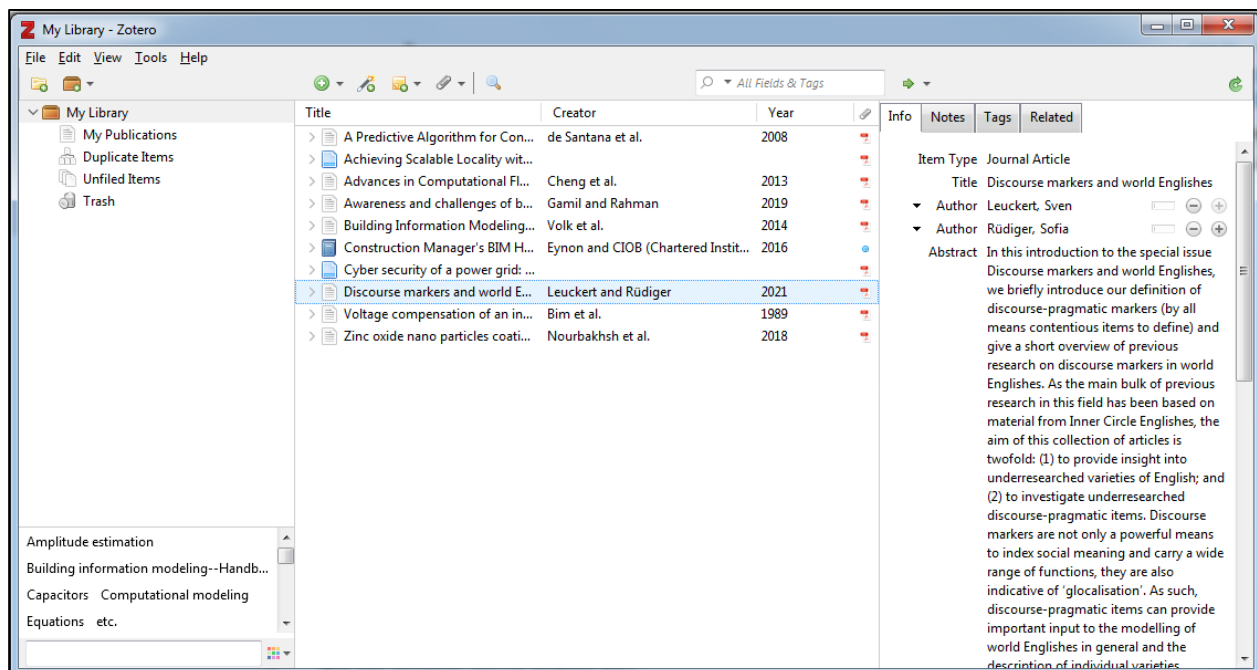
There are a number of ways to add references to Zotero

### 1.6.1. Download PDF documents and add to Zotero Desktop Application



### 1.6.2. Drag and drop pdf file in this window.

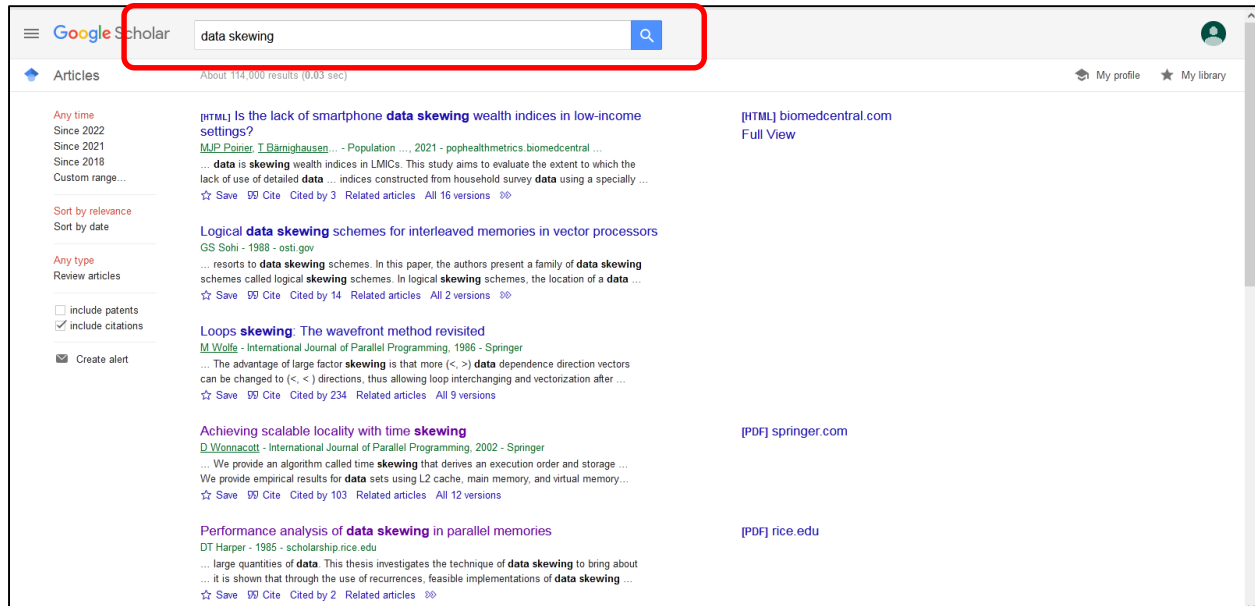
In a few seconds, zotero will extract citation information



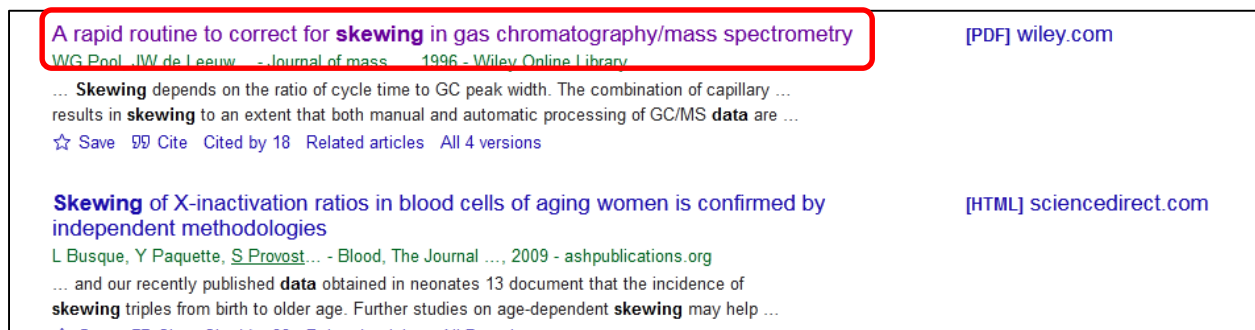


### 1.6.3. Use the browser connector

- Ensure that Zotero Application is running.
- Search for scholarly articles, e.g. By using Google scholar

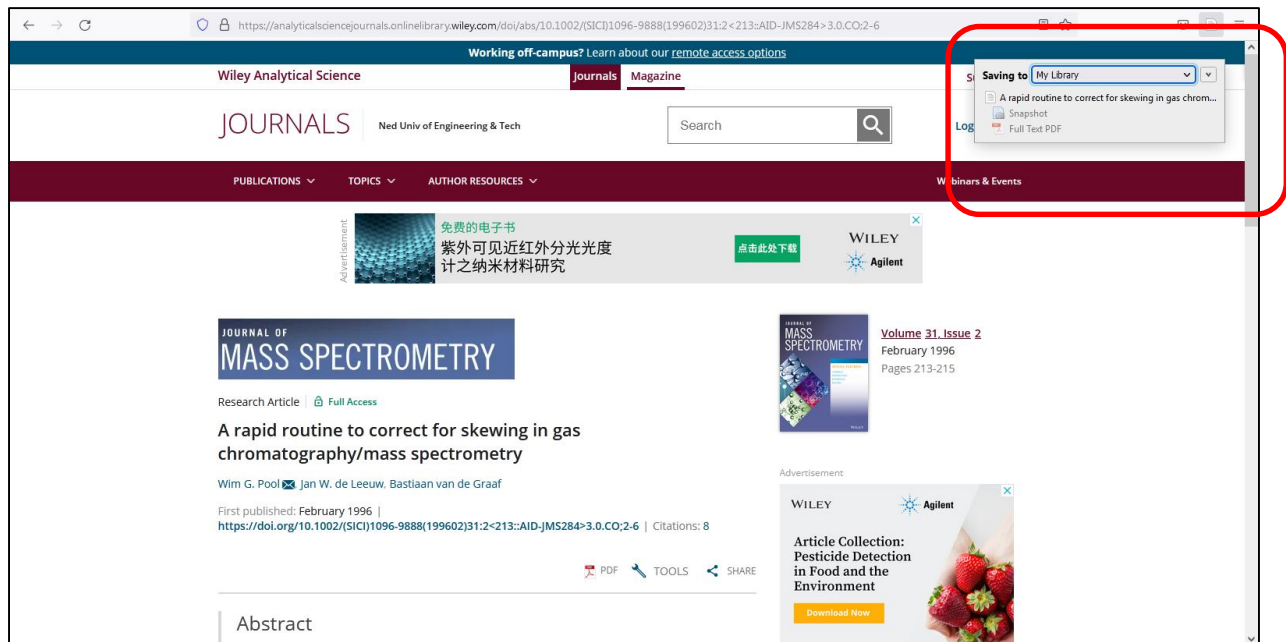


- Select and click on article from subscribed sources like IEEE, Elsevier, Wiley, etc.

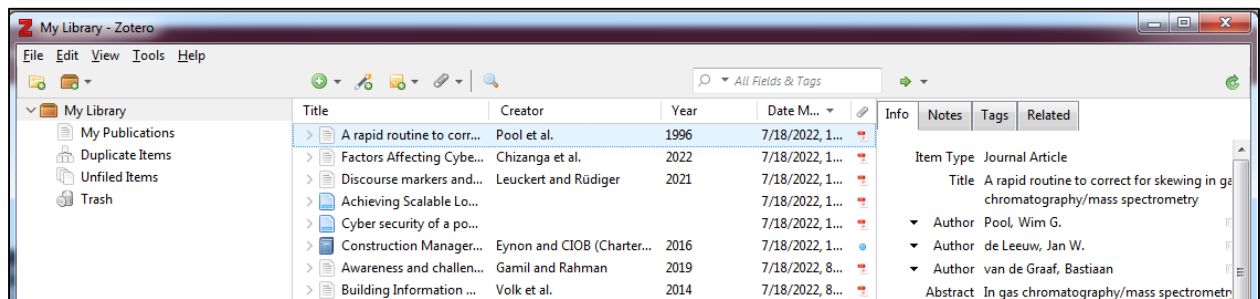




- Click on the connector at right top corner of browser. It will save citation and document (pdf if available) directly to Zotero Desktop app.



- Go to Zotero and check saved information

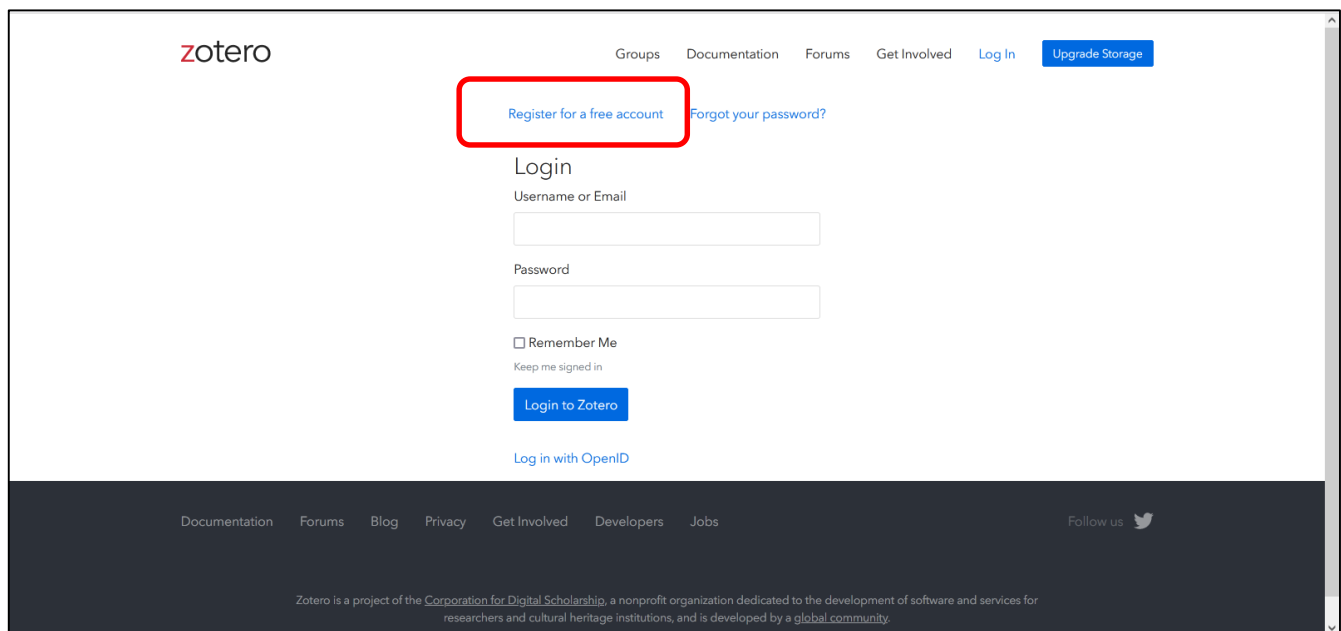


## 1.7. Access Zotero Anywhere

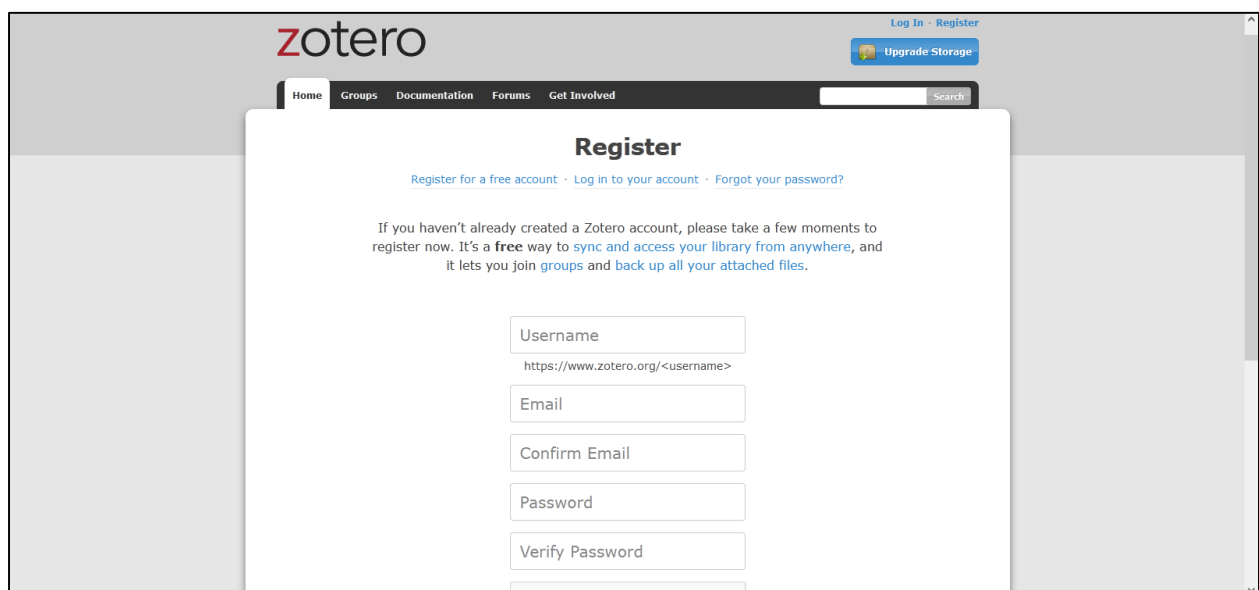
By default, Zotero stores all data locally on your computer. However using Zotero web account you can access your data anywhere

Creating a web account is a **free** way to [sync and access your library from any computer with internet access](#), join [groups](#) and [back up all your attached files](#).

- Create Web Account on Zotero at <https://www.zotero.org/user/login/>
- Register for Free Account on Login page



The screenshot shows the Zotero website's login page. At the top left is the 'zotero' logo. To its right are navigation links: 'Groups', 'Documentation', 'Forums', 'Get Involved', 'Log In', and a blue 'Upgrade Storage' button. Below these links, the 'Register for a free account' link is highlighted with a red rectangular box. To its right is the link 'Forgot your password?'. Below these links is the 'Login' section, which includes a 'Username or Email' input field, a 'Password' input field, a 'Remember Me' checkbox with the text 'Keep me signed in' below it, a blue 'Login to Zotero' button, and a 'Log in with OpenID' link. At the bottom of the page, there is a dark footer with links for 'Documentation', 'Forums', 'Blog', 'Privacy', 'Get Involved', 'Developers', and 'Jobs', along with a 'Follow us' link and a Twitter icon. A small paragraph at the very bottom states: 'Zotero is a project of the [Corporation for Digital Scholarship](#), a nonprofit organization dedicated to the development of software and services for researchers and cultural heritage institutions, and is developed by a [global community](#)'.



The screenshot shows the Zotero registration page. At the top left is the 'zotero' logo. To its right are navigation links: 'Home', 'Groups', 'Documentation', 'Forums', 'Get Involved', and a search bar. Below these links, the 'Log In - Register' link is highlighted with a blue box. To its right is a blue 'Upgrade Storage' button. Below these links, the 'Register' section is displayed. It includes the links 'Register for a free account', 'Log in to your account', and 'Forgot your password?'. Below these links, there is a paragraph: 'If you haven't already created a Zotero account, please take a few moments to register now. It's a **free** way to [sync and access your library from anywhere](#), and it lets you join [groups](#) and [back up all your attached files](#).' Below this paragraph are five input fields: 'Username', 'Email', 'Confirm Email', 'Password', and 'Verify Password'. Below the 'Verify Password' field is a blue 'Register' button.

- Login to your account and access the Web Interface.

The screenshot displays the Zotero Web Library interface. On the left, there is a sidebar with 'My Library' containing 'My Publications' and 'Trash'. Below this is a 'Filter Tags' section with various tags like 'Alignment network', 'Amplitude estimation', etc. The main area shows a table of research papers with columns for Title, Creator, Date, and Date Added. The table lists 15 papers, including titles like 'a rapid routine to correct for skewing in gas c...', 'Access and Alignment of Data in an Array Proc...', and 'Construction Manager's BIM Handbook'.

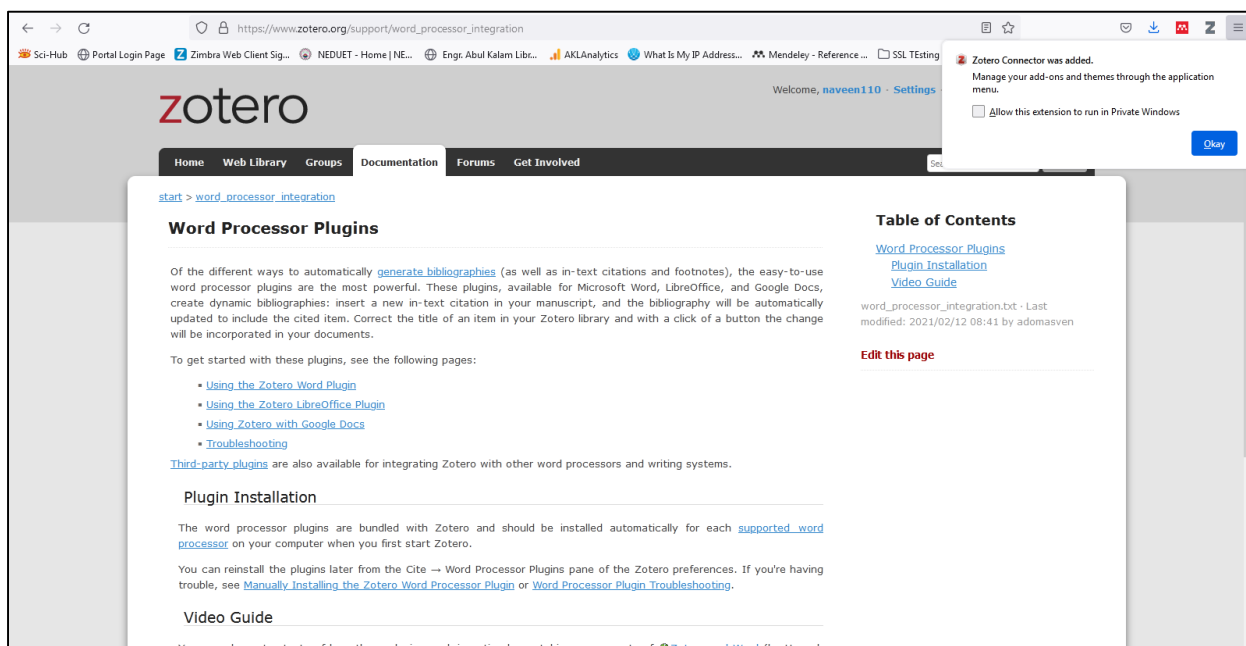
Title	Creator	Date	Date Added
a rapid routine to correct for skewing in gas c...	Pool et al.	1996	10/24/2022, ...
A rapid routine to correct for skewing in gas c...	Shao et al.	2022	10/24/2022, ...
Tracing the evolution of AI in the past decade ...			10/24/2022, ...
Access and Alignment of Data in an Array Proc...	Lawrie	1975-12	7/18/2022, ...
Modelling Cyber Security: Approaches, Metho...	Gori	2009	7/18/2022, ...
A rapid routine to correct for skewing in gas c...	Pool et al.	1996	7/18/2022, ...
Factors Affecting Cyber Security Awareness in ...	Chizanga et al.	2022-01	7/18/2022, ...
Discourse markers and world Englishes	Leuckert and Rüdiger	2021-03-11	7/18/2022, ...
Achieving Scalable Locality with Time Skewing I...			7/18/2022, ...
Cyber security of a power grid: State-of-the-ar...			7/18/2022, ...
Construction Manager's BIM Handbook	Eynon and CIOB (Chartered Institute of Buildi...	2016	7/18/2022, ...
Awareness and challenges of building informa...	Gamil and Rahman	2019-08-10	7/18/2022, ...
Building Information Modeling (BIM) for existi...	Volk et al.	2014	7/18/2022, ...
Zinc oxide nano particles coating on polyester...	Nourbakhsh et al.	2018	7/15/2022, ...
Advances in Computational Fluid Dynamics (CF...	Cheng et al.	2013-08-15	7/15/2022, ...
A Predictive Algorithm for Controlling Speed a...	de Santana et al.	2008-12	7/14/2022, ...
Voltage compensation of an induction generat...	Bim et al.	1989-09	7/14/2022, ...

## 2. Word Processor and Writing Integration

### 2.1. Plugin Installation

The word processor plugins are bundled with Zotero and should be installed automatically for each supported word processor on your computer when you first start Zotero.

You can reinstall the plugins later from the Cite → Word Processor Plugins pane of the Zotero preferences. If you're having trouble, see [Manually Installing the Zotero Word Processor Plugin](#) or [Word Processor Plugin Troubleshooting](#).



### 2.2. Word and Zotero

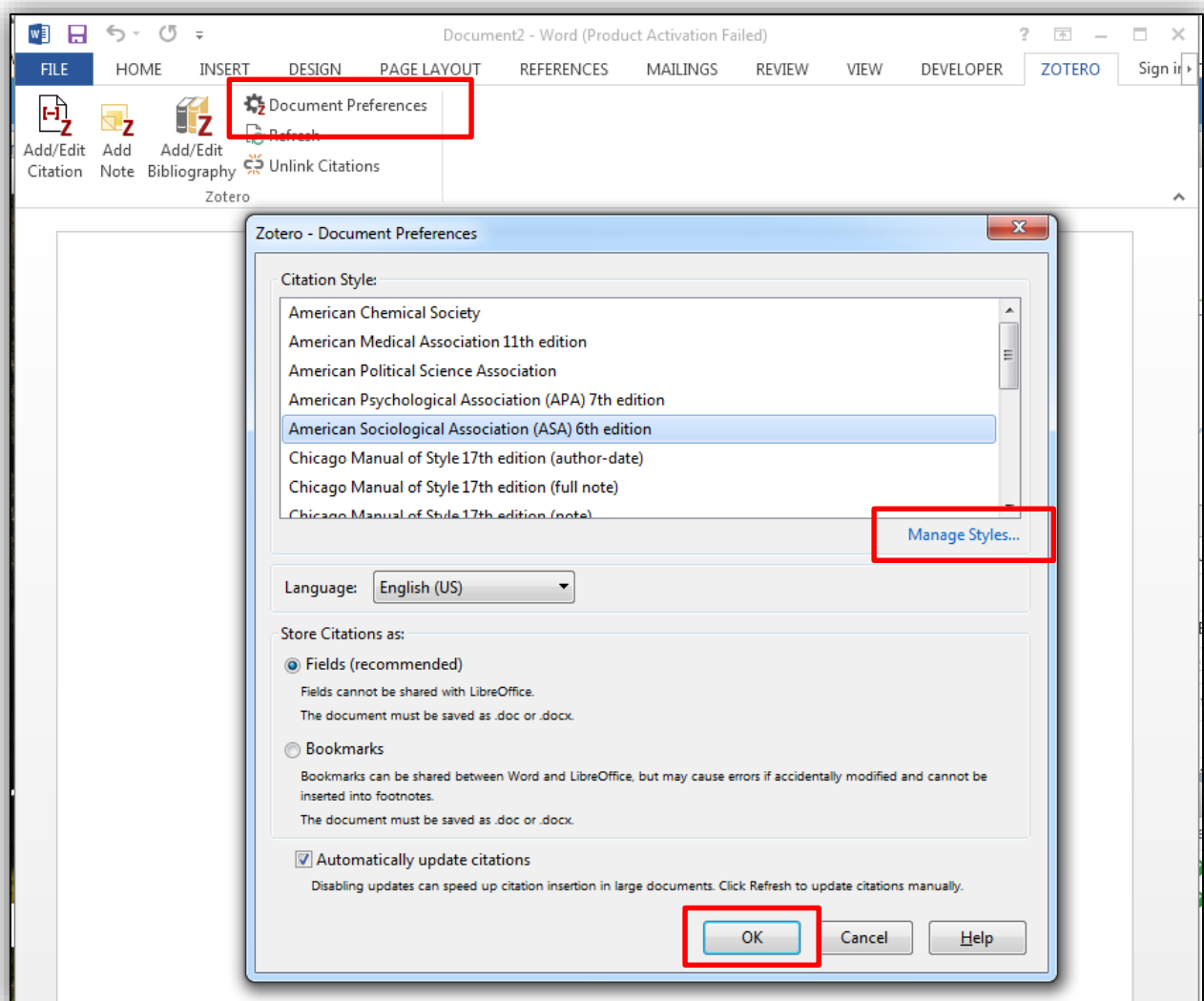
Successful installation of Zotero Plugin will result in a Zotero ribbon for Microsoft Word



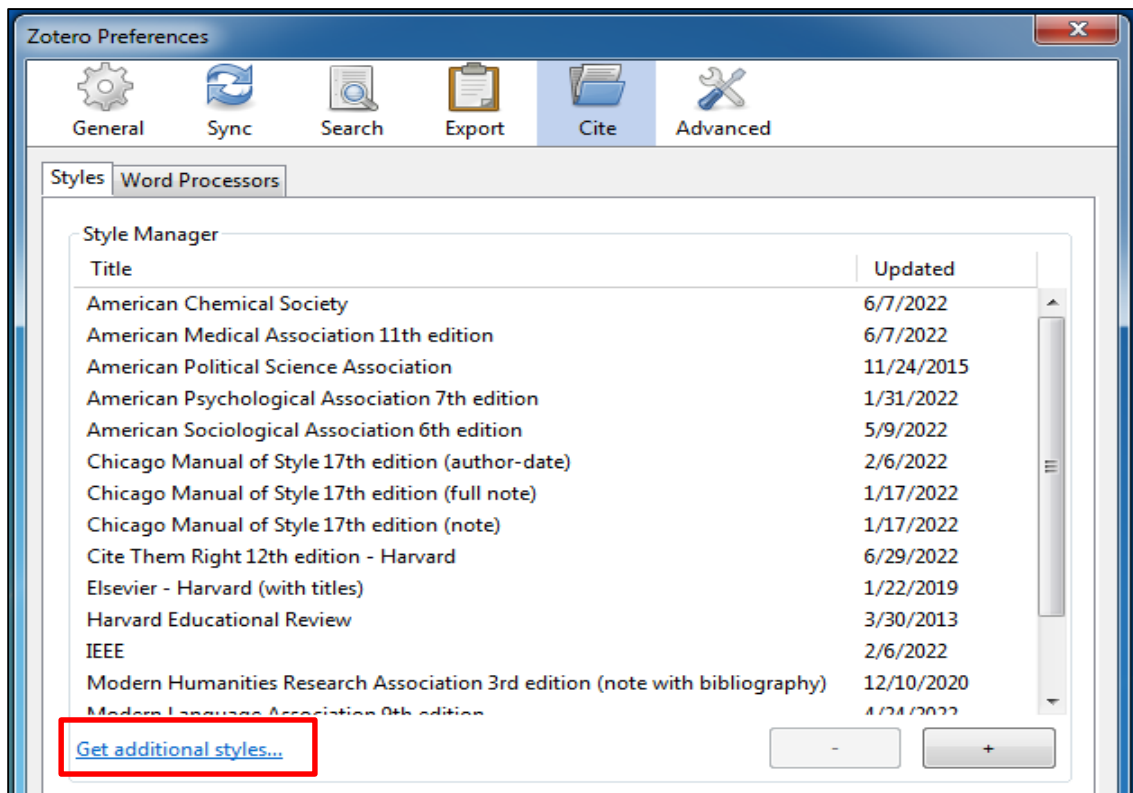
## 2.3. Setup Preferences for Citation Style and Add Citation Dialog Box

### 2.3.1. Set up Citation Style

1. Select Document Preferences.
2. Select required style and Press OK.
3. If style is not available, Choose Manage Styles...

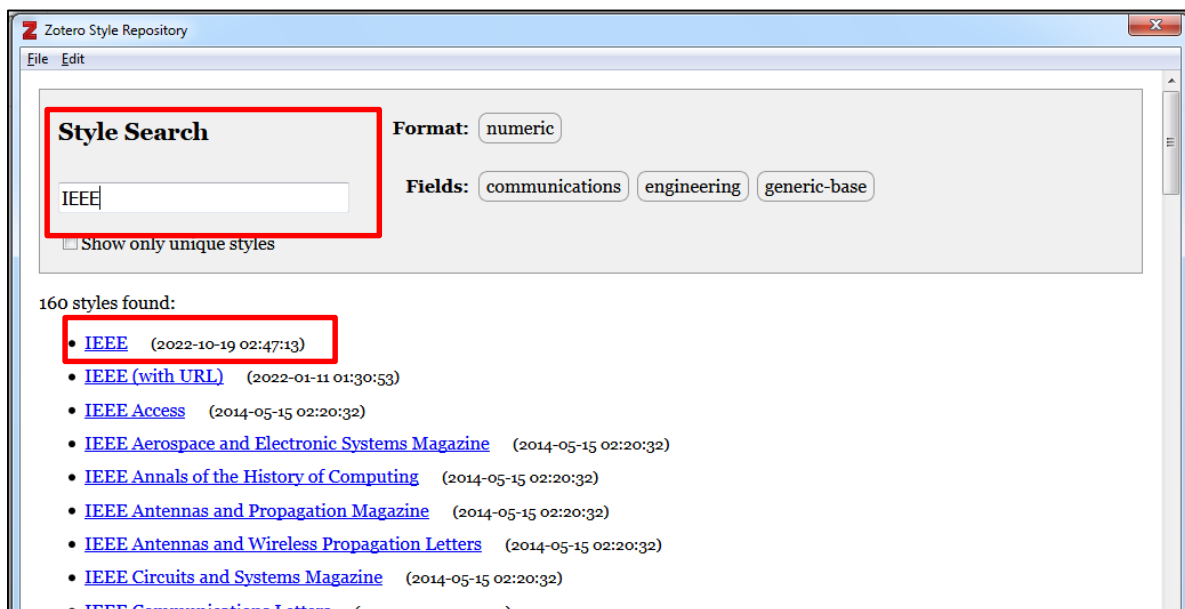


4. Select Get Additional Styles...



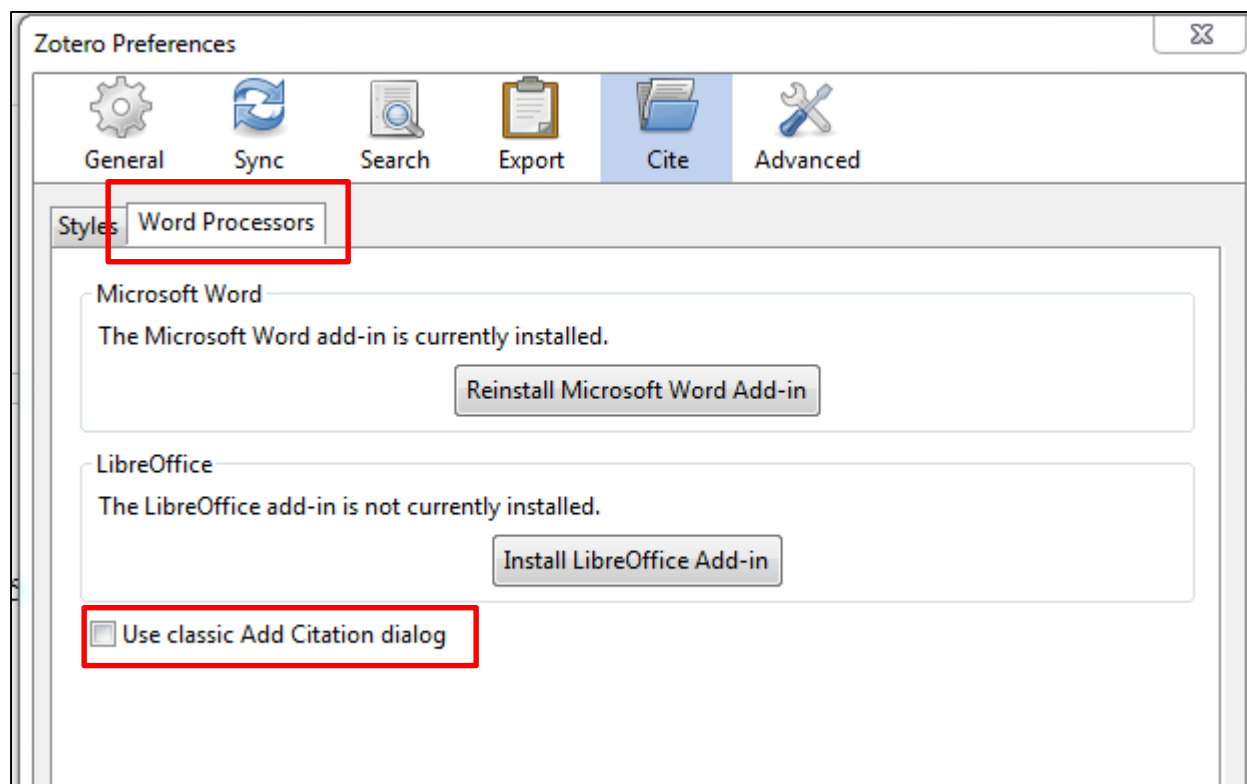
5. Search for a Style

6. Select and click on it to add to Zotero.



### 2.3.2. Set up Add Citation Dialog Box

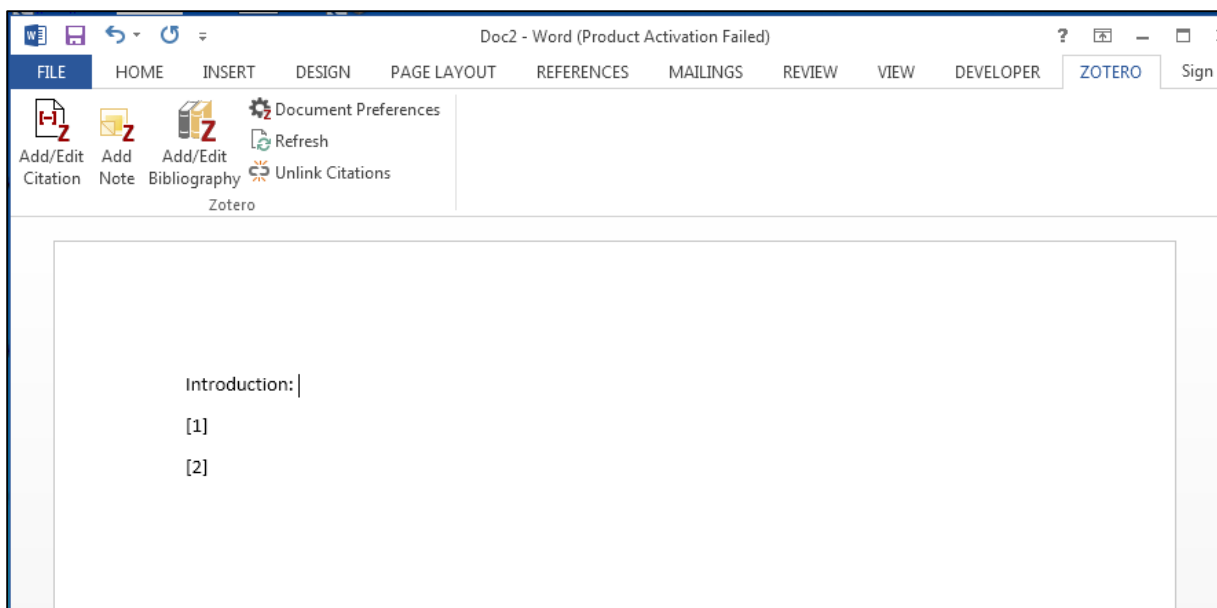
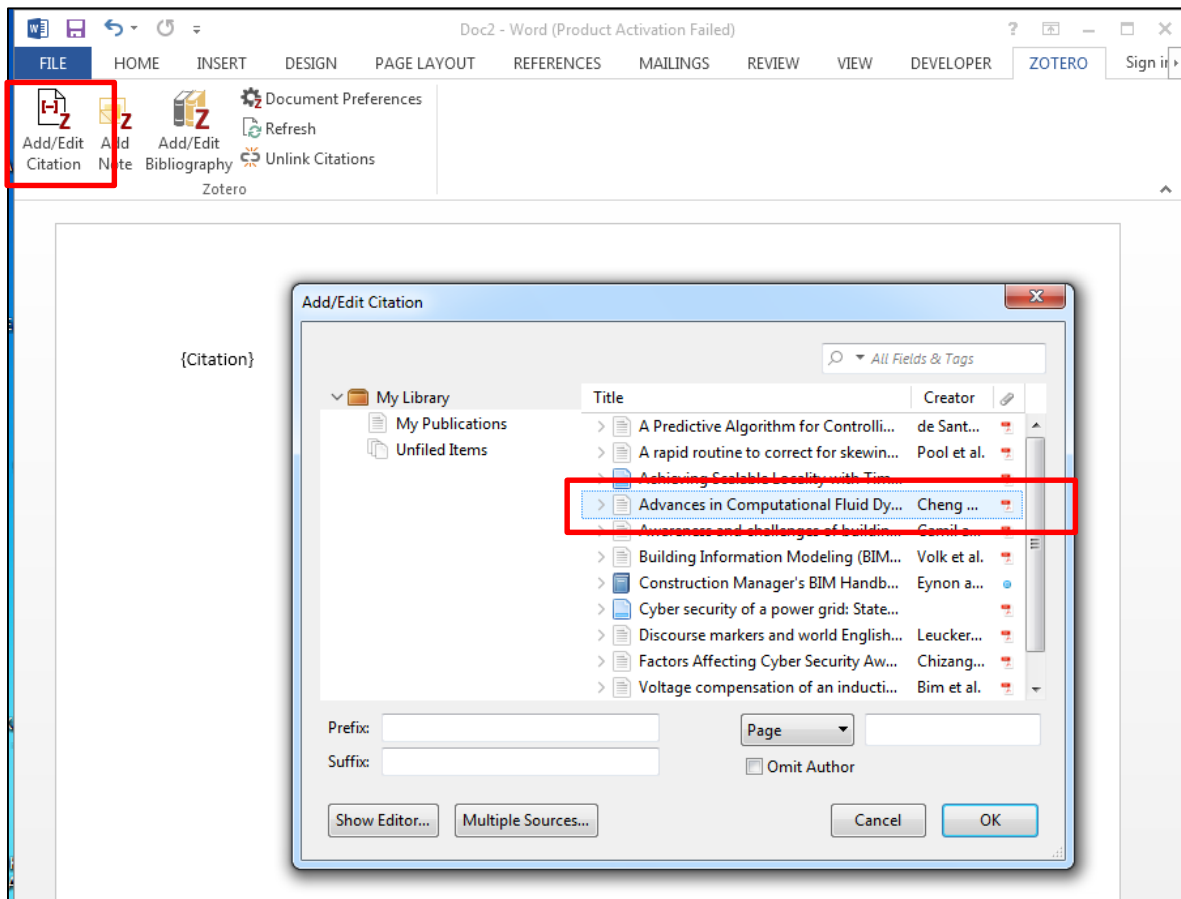
In the Word Processors tab, check Use classic Add Citation dialogue.





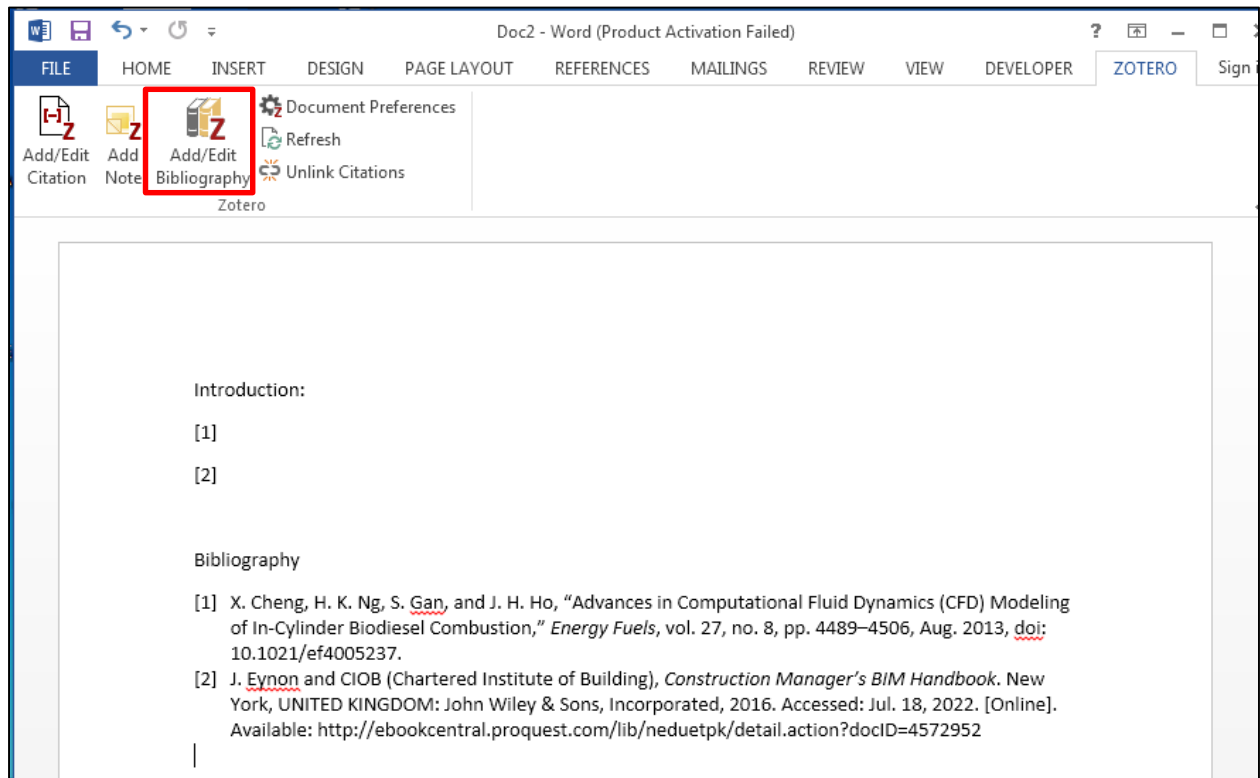
## 2.4. In text Citation

- Click on Add/Edit Citation Button
- Select required citation and press OK



## 2.5. Insert Bibliography

- Place cursor where you wish to
- Select the Add/Edit Bibliography button.



## More Help: Zotero Support Links

### Quick Links

- [Installation](#)
- [Quick Start Guide](#)
- [Getting Help](#)
- [Frequently Asked Questions](#)
- [System Requirements](#)

### Using Zotero

- **Getting Stuff Into Your Library**
  - [Adding Items](#)
  - [Adding Files](#)
  - [Importing from Other Reference Managers](#)
- **Organizing Your Library and Taking Notes**
  - [Collections and Tags](#)
  - [Searching](#)
  - [Sorting](#)
  - [PDF Reader](#)
  - [Notes](#)
  - [Related Items](#)
  - [Duplicate Detection](#)
- **Generating Bibliographies, Citations, and Reports**
  - [Creating Bibliographies within Zotero](#)
  - [Word Processor Integration](#)
  - [Citation Styles](#)
  - [Reports](#)
- **Syncing, Collaboration, and Backup**
  - [Data and File Syncing](#)
  - [Groups](#)
  - [Share your work with My Publications](#)
  - [Backup](#)
- **Zotero Preferences**
  - [Preferences](#)
  - [Zotero Connector Preferences](#)
- **Getting the Most Out of Zotero**
  - [Plugins](#)
  - [Visualize your library with Timelines](#)
  - [Tips and Tricks](#)
  - [Zotero for Mobile](#)
  - [Community-developed Video Tutorials](#)