ZOTERO 5.0.96.2

Zotero is a free citation 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, and Google Docs.

Installation: To use Zotero install both Zotero and a connector to a browser.

> Zotero is available at https://www.zotero.org/. Click Download. When you download Zotero, choose the connector for Firefox, Chrome, Safari, or Edge. The Firefox connector may not be working at this time. The word processor plugins for Word, LibreOffice, and Google Docs are already bundled with Zotero.

Open Zotero from your applications folder. The Zotero icons will appear on the top menu or under a top menu item in Word, such as Add-Ins, Zotero, or a scroll icon.
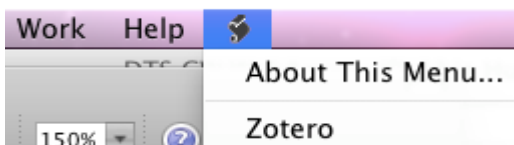

Fig. 1. Zotero icons under a scroll icon.

Syncing: Zotero supports syncing of data and files so that you can access your Zotero library on any computer with Internet access. You will need to create a login and pw in Sync under Preferences (under Zotero on the main menu) on each computer. Syncing your citations on a public computer may add your citations to someone else's account and/or someone may save citations to yours. See also Moving a Zotero Library later in this handout.

For documentation from Zotero, go to https://www.zotero.org/ and click Documentation.

Building a Zotero library

To **create a folder** for a new collection, open Zotero. Click the folder icon at the far left of the Zotero toolbar (Fig. 2) and name your new collection.
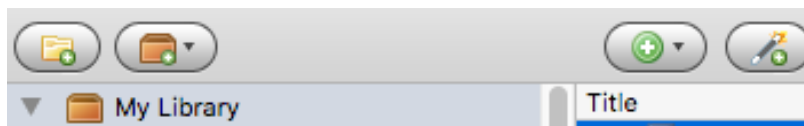

Fig. 2. Folder icon in Zotero.

Importing Citations: As explained in the appendix, you can import libraries into Zotero directly from a citation management system such as EndNote.

Citations from a Database: If Zotero knows you are viewing a list of records on an Internet page, a folder icon will appear in the upper right corner of the browser. Click the folder icon, and a box will come up to allow you to choose records on the page to add to your Zotero library. Or view a single record on the webpage and click the new icon in the browser.

Fig. 3. Zotero icons for a list, an article, a book, and a webpage, resp.

Example using WorldCat: Open your browser. Open Zotero. Click the yellow folder with the green circle on the Zotero toolbar to create a new library. Type in a name for your library. Click OK (Fig. 4).

Fig. 4 Naming a new collection

In the search box for WorldCat on the library homepage, search for << "natural theology" boedder >> to bring up a list of records that includes Bernard Boedder's book, *Natural Theology*. Click the yellow folder icon in the upper right corner of the browser (Fig. 3). A list of records comes up (Fig. 5). Check the box beside the correct record, the first one in this case. Click OK. Zotero will add the record to the Zotero library you just created.
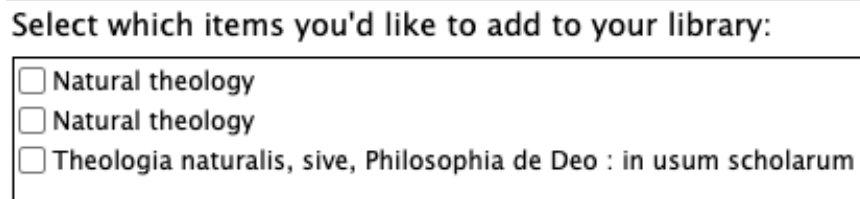

Fig. 5 List of records in DTS on WorldCat

Example using Atla: Open your browser. Open Zotero. Click the yellow folder with the green circle on the Zotero toolbar to create a new library. Type in a name for your library. Click OK. Or use a library you already created by clicking it. Click the Atla link (not the checkbox) on the library homepage to go to Atla (Fig. 6).

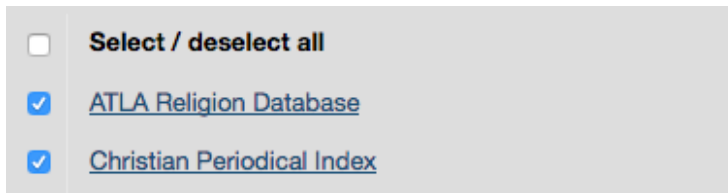Fig. 6 The Atla link on the library homepage

In Atla search for << missionary and (resign* or failure or attrition or burnout) >>. A list of records comes up. Click the title of one of them. In the upper right-hand corner of the browser is an icon of a sheet of paper as in Fig. 3. Click the icon, and Zotero will automatically add the record to your open Zotero library (Fig. 7).
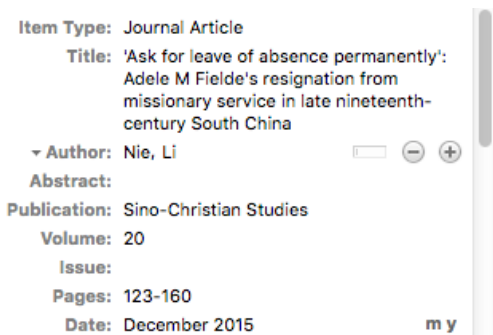

Fig. 7

Manually Adding Entries: If you have an item in hand but not on the screen, click the New Item icon on the Zotero menu (Fig. 8). Choose the type of record you need, e.g. book, book section, journal article, and type the information about the item into the appropriate fields of the new record.
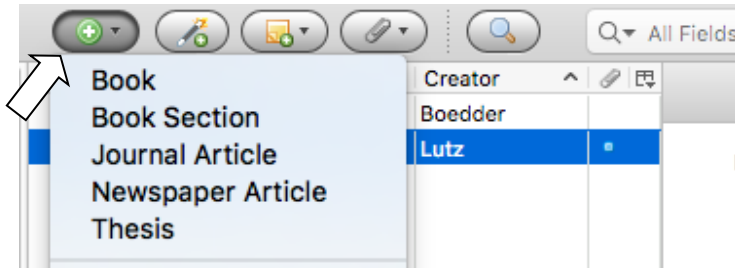

Fig. 8 New Item icon

Citing within Word

To **insert a citation** within a paper, click Add/Edit Citation on the Zotero toolbar in Word while the cursor is in the footnote field, choose a bibliographic style, type words from the citation into the box that comes up, cursor to the correct record in the list that comes up, and press <enter>. Click the citation and add page numbers if necessary. Press <enter>. Press <enter> again to create the footnote.
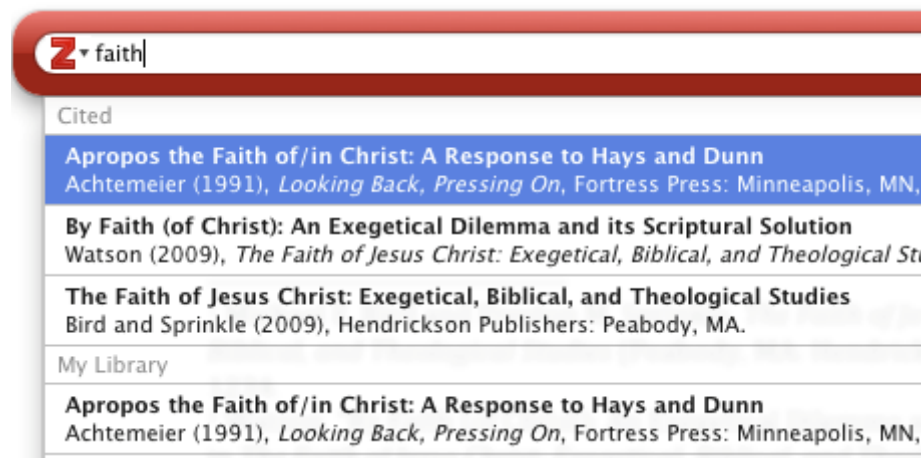

Fig. 9 Type in the Zotero box, and select the citation.

To **add multiple sources** to a single footnote, enter a single citation into the Zotero box as above. Before you press <enter> to create the footnote, type the next citation in the Zotero box. Continue as needed.

To change to the **Classic View**, click the arrow to the right of the Z in the search box (Fig. 9). In the Classic View you can choose the library to use and click on the entry you want. Type the page numbers in the Page box and click OK to enter the citation. To enter multiple citations, choose Multiple Sources on the lower left. Click the green arrow after choosing an entry to place it in the right-hand column. Then add page numbers.

To **change the format** of all your citations, click Document Preferences on the Zotero toolbar in Word and choose a new style.

If the format you choose automatically uses a shorter form for citations after the initial one, it will also reformat citations appropriately if you select and **move text** within the document and thereby reorder the footnotes. Use Refresh on the toolbar to update the format when necessary.

Zotero 5.0.96.2 uses the 8th edition of Turabian, which includes the use of Ibid. If Turabian style is inadequate for your needs, try one of the Chicago (17th ed.) options. The **Author-Date** format places the author, date, and page number in the text. The **Full Note** format uses the author's last name, title, and page numbers for later citations which are not consecutive. The **Note** format inserts even initial citations in the short form (author's last name, title, pages). Both Chicago's Full Note and Note formats omit the title in consecutive citations after the first one.

To **install a new style** from the Zotero Style Repository, go to Zotero, choose Preferences under Zotero on the main menu. Click the Cite tab, choose Styles, and click the link, Get additional styles. To download a style to your computer, click the title of the style you want.

Click Zotero Add/Edit Bibliography on the Zotero toolbar in Word to **create a bibliography** for the citations you used.

Use **Add/Edit Citation** to change a page number or to add or remove citations in a footnote, but make other edits directly in the Zotero record. If you edit a citation manually in your paper, Zotero cannot update it. In addition, if you use **Add/Edit Bibliography** to edit the bibliography, entries you edited will not update. For most changes, edit records directly in the Zotero library. But this may not be sufficient.

Before making **final changes** in the footnotes and bibliography, save a second copy of the paper. Click Unlink Citations in one copy to break the tie to Zotero. Then make final changes manually. Use the copy still connected to Zotero if you decide later to make major revisions to the paper.

Moving a Zotero library to another computer

To move your Zotero library to another computer, copy the Zotero data folder from your Zotero profile on the first computer to the Zotero profile on the second.

To locate your Zotero data, open Preferences under Zotero on the main menu and click Show Data Directory under Files and Folders in the Advanced tab.

Close Zotero on both machines before you copy the Zotero files. (See https://www.zotero.org/support/kb/transferring_a_library for more detail.)

This method works well for infrequent moves. To use the same Zotero libraries on multiple computers, use syncing instead. See https://www.zotero.org/support/sync for details.

Backing up and restoring a Zotero library

To back up: To locate your Zotero data, open Preferences under Zotero on the main menu and click Show Data Directory under Files and Folders in the Advanced tab. Close Zotero. Copy your Zotero data directory to a backup location.

To restore: See https://www.zotero.org/support/zotero_data .

Appendix: Importing Records from EndNote into Zotero

This description of how to move bibliographic records from EndNote to Zotero is condensed from https://www.zotero.org/support/kb/endnote_import. The instructions assume that you still have EndNote installed. Please be aware that you may lose data when you move records from EndNote to Zotero.

Exporting an EndNote Library

Go to the File menu → Export. Save the file to the EndNote data directory (e.g., My Documents\endnote.Data). Export in XML format. Click "Save." Close EndNote.

Go to https://www.zotero.org/support/kb/endnote_import to see how to import file attachments and figures.

Importing into Zotero

Open Zotero. Under the File menu, select "Import…." A dialog box will appear asking you to select the file to import. Navigate to the location where you exported your EndNote library (if you followed the instructions above, this should be My Documents\endnote.Data) and select the XML file. Click Open.

Some fields in EndNote records cannot be imported into fields in Zotero records. However, Zotero will store the information from these fields in a note attached to the imported record. Copy the information you need from the note into the pertinent fields in the Zotero records. Review the notes to determine what information to retain. Then delete the notes.

To **export/import libraries** from other database managers, you can use a similar method.