

zotero Instructions

Table of Contents

[Overview](#)

[Download Mozilla Firefox](#)

[Download Zotero for Firefox](#)

[Register for a Zotero Account](#)

[Create a New Group](#)

[Add Members to Group](#)

[Update roles of Members of a Group](#)

[Transfer Ownership of a Group](#)

[Set Zotero Preferences](#)

[Sync Zotero for Firefox and Zotero Standalone](#)

[Add File to Zotero Group Library & Retrieve Metadata](#)

[Create In-text Citation in Word](#)

[Create Bibliography in Word](#)

[Editing Metadata](#)

[Additional Training Resources](#)

- **Overview**

- Zotero is a free and open-source reference manager.
- There are three versions of Zotero that you can use; two are desktop client versions, and the third version is their website.
 - Zotero Standalone
 - is a separate, browser-independent application.
 - It is almost identical to the Firefox extension (Zotero for Firefox).
 - Since it lives outside of your browser, it does not have all of the advanced features.
 - Zotero Connectors (Chrome, Safari, & Firefox)
 - After installing Zotero Standalone, you can install one or more Zotero connectors.
 - Connectors are browser add-ons that allow you to save items directly from your web browser to Zotero Standalone.
 - The Firefox connector is special; it is called Zotero for Firefox.
 - In this case, Zotero is embedded within Firefox, and takes up half of your Mozilla Firefox window.
 - It runs on your computer and is not the same as the Zotero Server (website).
 - Only version which allows all available features of Zotero.
 - Zotero Server
 - View your libraries while logged into their website.

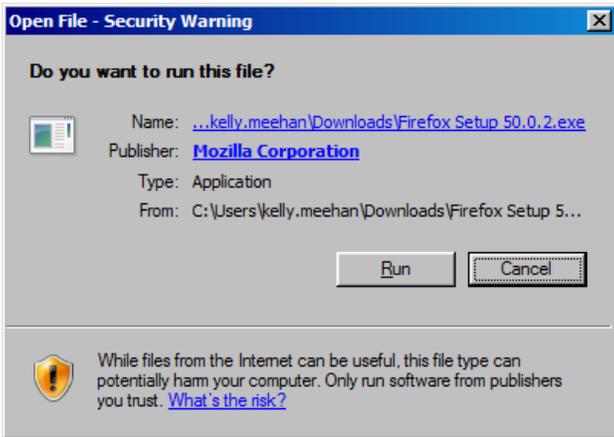
- **[Download Mozilla Firefox](#) (free and open-source web browser).**

- Click Download Firefox
- This will download a Setup Executable (.exe file)

[Table of Contents](#)

Table of Contents

- Open Executable
- Select Run



- **Download Connector (Zotero for Firefox)**

- Open Mozilla Firefox
- Go Zotero Download page (copy and paste into Mozilla search bar: <https://www.zotero.org/download/>)
- Click Install Zotero for Firefox

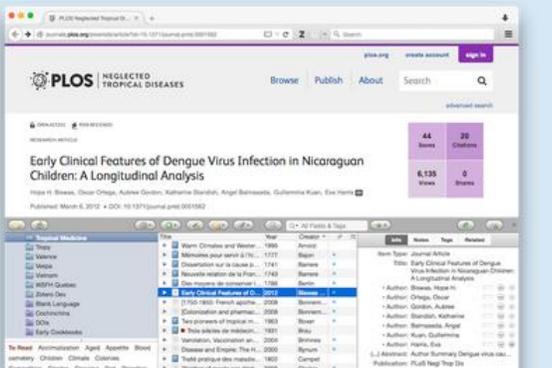
Zotero for Firefox

Zotero for Firefox lets you capture and organize all your research without ever leaving the browser.



Add a [plugin for Word or LibreOffice](#)

[Trouble installing Zotero?](#)



Zotero Standalone

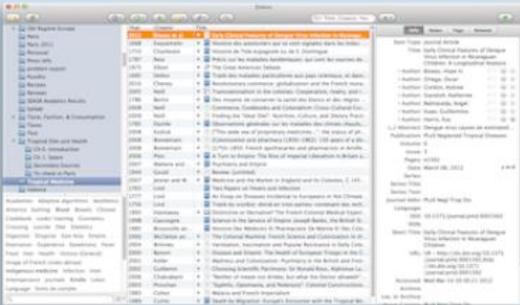
Zotero Standalone runs as a separate application and plugs into your choice of browser.



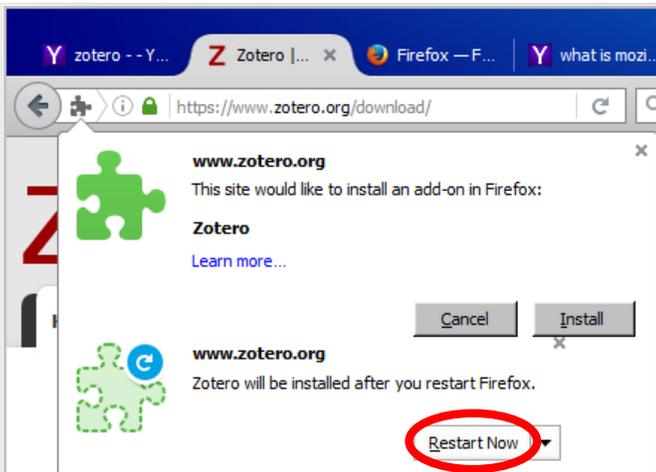
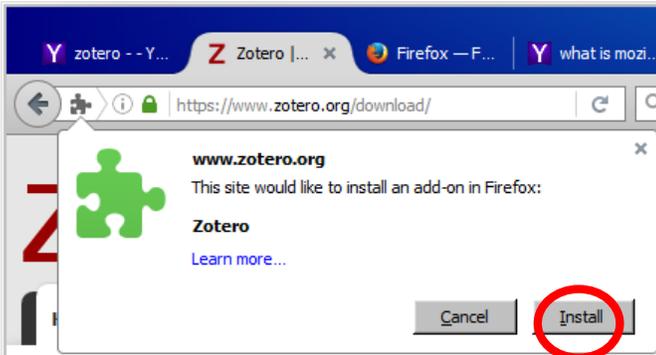
Next, add one of the following browser extensions:



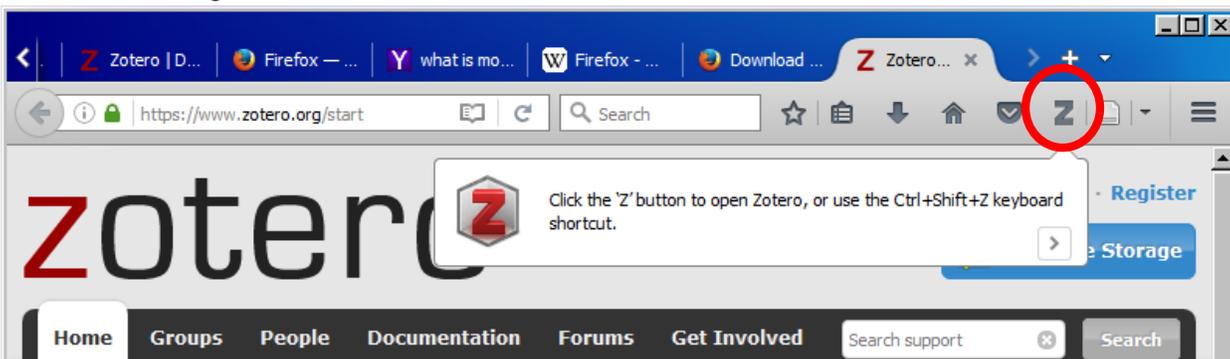
Plugins for Word and LibreOffice are included



[Table of Contents](#)



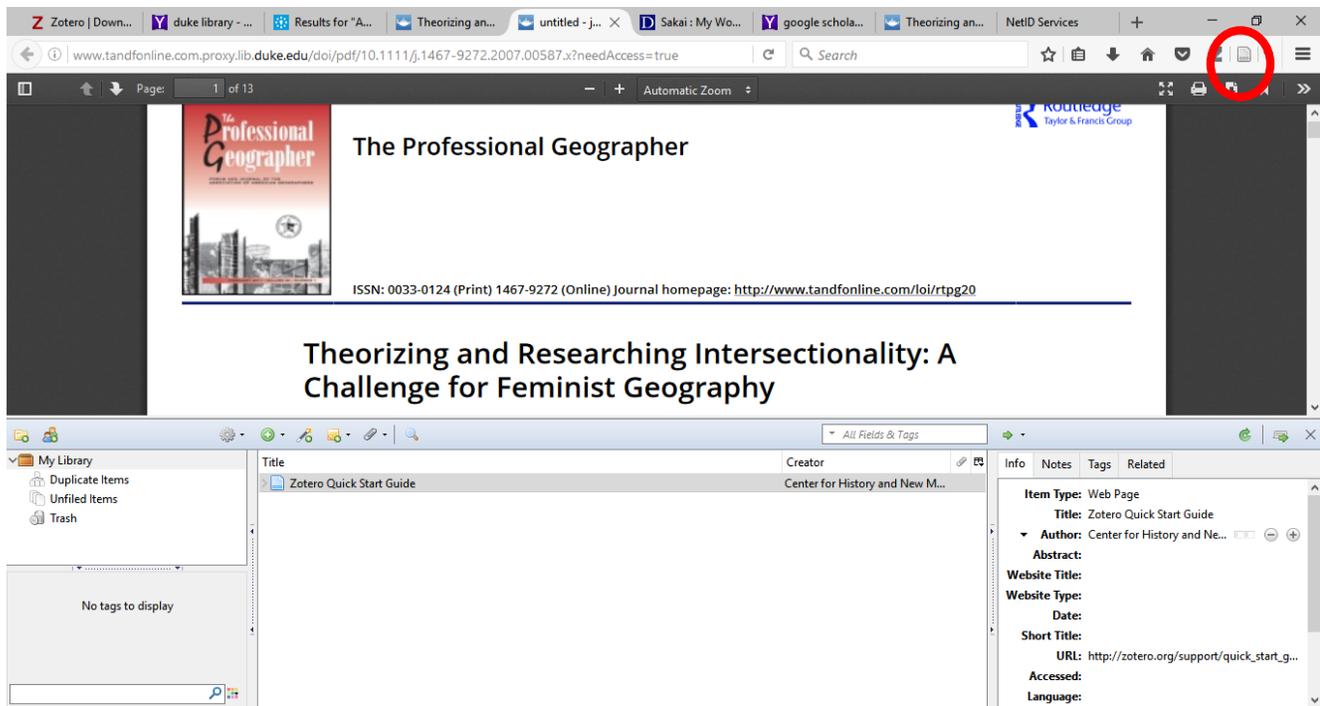
- Zotero for Firefox will add a Zotero, Z, icon to your Mozilla Firefox web browser in the upper right hand corner.



[Table of Contents](#)

Table of Contents

- When you click on the Z icon, the Zotero (half screen) online platform will appear. If you happen to have the Zotero Standalone application (discussed later), then this will bring up that screen instead. Merely close the Standalone if you wish to use the half screen online platform. **This feature can only be used with the Mozilla Firefox web browser.**

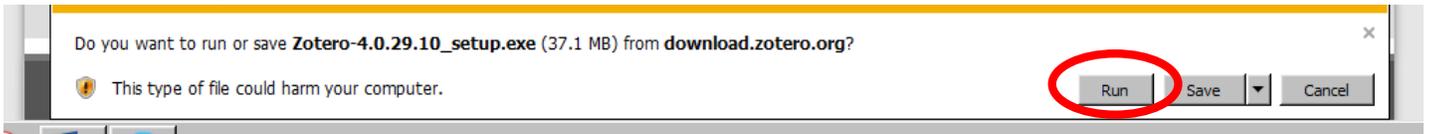


- When you have an article online, you can click the Save to Zotero button and it will be added to your library. (You will be prompted to [set your preferences](#) first, but more on that later.)
- **Download Zotero Standalone**
 - (This will download the desktop application version of Zotero onto your computer. The desktop version is independent of the internet.)
 - Click the Download Zotero for Windows button on the right

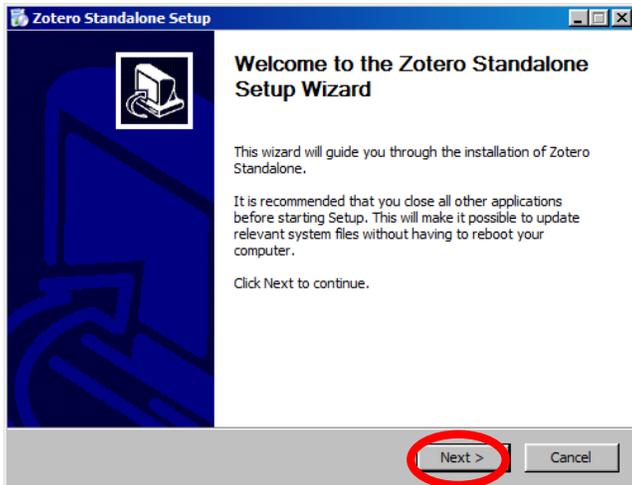
Table of Contents

[Table of Contents](#)

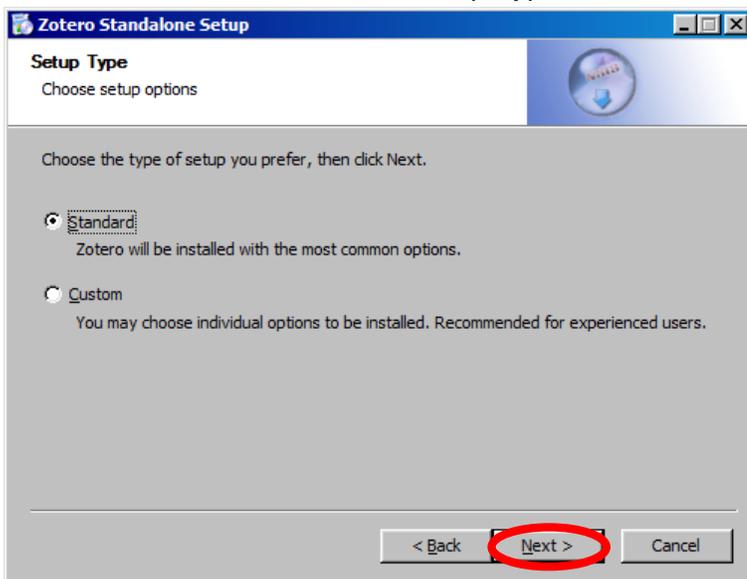
- This will download the Zotero Standalone Setup Executable File.
- Open this file and run it.



- At some point a security warning may come up, requesting an administrator password.
 - Select No when this comes up and it will let you download it anyway.
- Select Next



- Select Standard Setup Type and Next

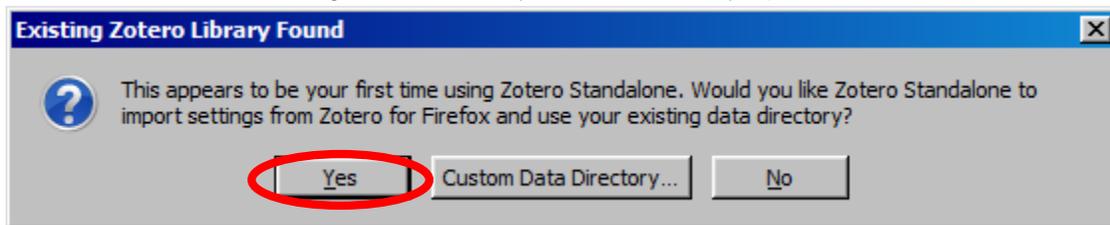


- Click Install
- Click Finish

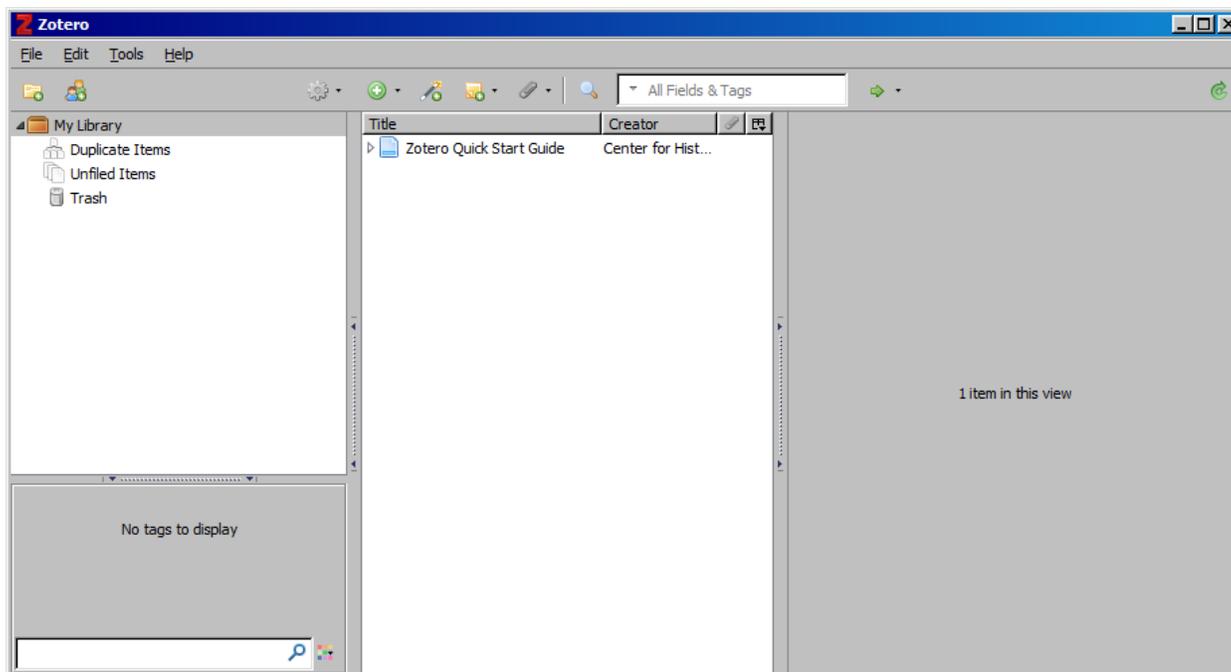
[Table of Contents](#)

[Table of Contents](#)

- An Existing Zotero Library Found box may open. Select Yes

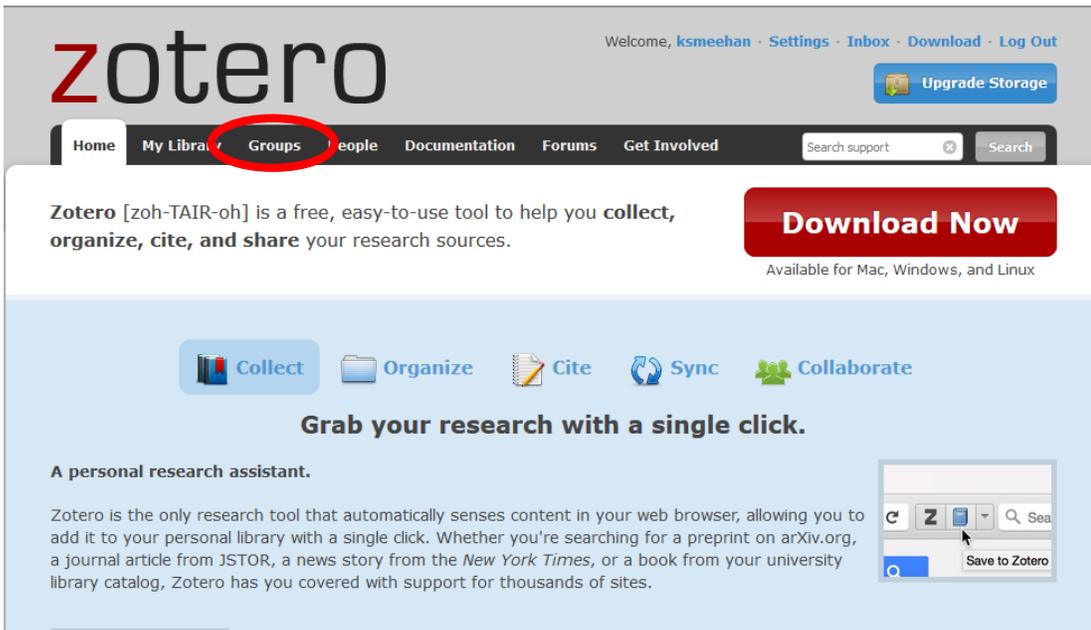


- You've now downloaded the Zotero Standalone application which should be open and look like this:



- [Register for a Zotero Account Online](#)
 - Fill in the requested information.
 - Write down your username and password for later for syncing Zotero for Firefox or the Standalone with the Zotero Server.
- **Create a New Group**
 - [Log in](#) to your personal profile online.
 - Click the [Groups tab](#)

[Table of Contents](#)



Welcome, [ksmeehan](#) · [Settings](#) · [Inbox](#) · [Download](#) · [Log Out](#)

zotero

[Home](#) [My Library](#) **[Groups](#)** [People](#) [Documentation](#) [Forums](#) [Get Involved](#)

Download Now
Available for Mac, Windows, and Linux

[Collect](#) [Organize](#) [Cite](#) [Sync](#) [Collaborate](#)

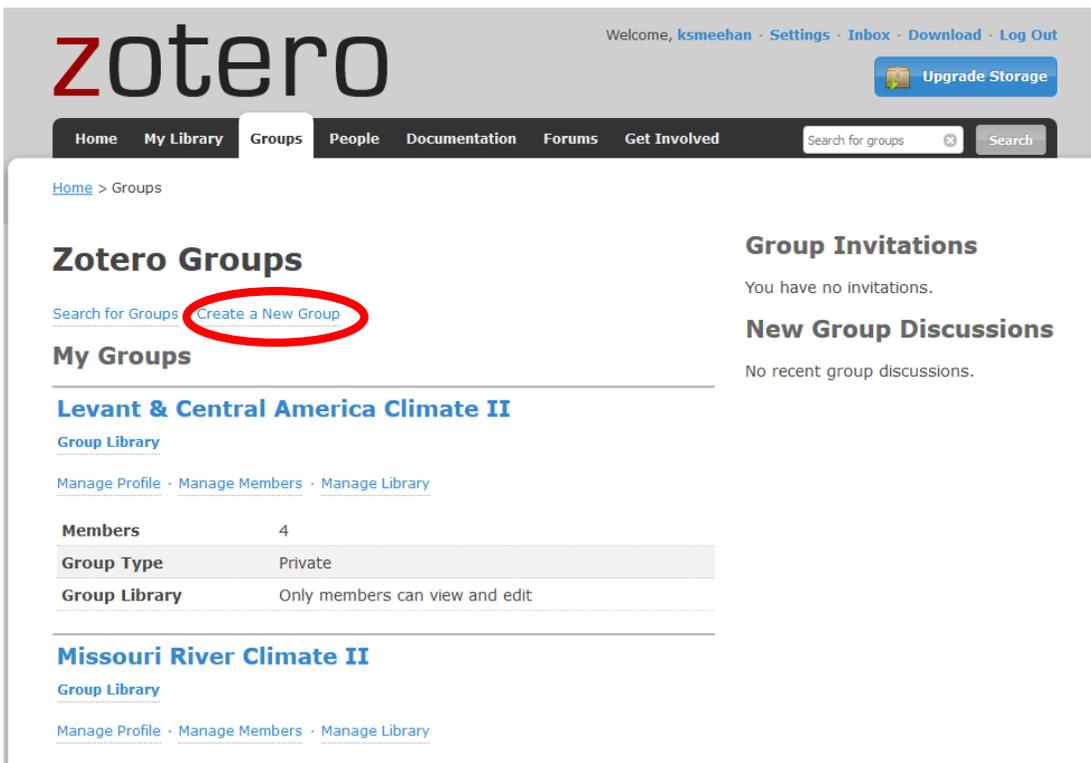
Grab your research with a single click.

A personal research assistant.

Zotero is the only research tool that automatically senses content in your web browser, allowing you to add it to your personal library with a single click. Whether you're searching for a preprint on arXiv.org, a journal article from JSTOR, a news story from the *New York Times*, or a book from your university library catalog, Zotero has you covered with support for thousands of sites.



- In the [Groups tab](#), you'll have listed all of the groups that you're a part of.
- [Create new group](#)



Welcome, [ksmeehan](#) · [Settings](#) · [Inbox](#) · [Download](#) · [Log Out](#)

zotero

[Home](#) [My Library](#) **[Groups](#)** [People](#) [Documentation](#) [Forums](#) [Get Involved](#)

[Home](#) > [Groups](#)

Zotero Groups

[Search for Groups](#) **[Create a New Group](#)**

My Groups

Levant & Central America Climate II

[Group Library](#)

[Manage Profile](#) · [Manage Members](#) · [Manage Library](#)

Members	4
Group Type	Private
Group Library	Only members can view and edit

Missouri River Climate II

[Group Library](#)

[Manage Profile](#) · [Manage Members](#) · [Manage Library](#)

Group Invitations

You have no invitations.

New Group Discussions

No recent group discussions.

- Create a name for your new group
- Choose private membership
- Click Create Group

[Table of Contents](#)



[Home](#) > [Groups](#) > New group

Create a New Group

[Search for Groups](#) · [Create a New Group](#)

Group Name

Choose a name for your group

Group URL: <https://www.zotero.org/groups/<number>>

Group Type

Public, Open Membership

Anyone can view your group online and join the group instantly.

Choose a Public, Open Membership

Public, Closed Membership

Anyone can view your group online, but members must apply or be invited.

Choose Public, Closed Membership

Private Membership

Only members can view your group online and must be invited to join.

Choose Private Membership

○ Click Save Settings



[Home](#) > [Groups](#) > [Philippines Disasters](#) > Settings

Philippines Disasters Settings

[Group Settings](#) · [Members Settings](#) · [Library Settings](#)

Group Type

Private

Public, Closed Membership

Public, Open Membership

Controls who can see and join your group

Library Reading

Anyone on the internet

Any group member

Who can see items in this group's library?

Library Editing

Any group member

Only group admins

Who can add, edit, and remove items from this group's library?

File Editing

Any group member

Only group admins

No group file storage

Who can work with files stored in the group? Public Open groups cannot have file storage enabled.

[Table of Contents](#)

- **Add Members to Group**
 - [Log in](#) to your personal profile online.
 - Groups tab
 - Manage members (under the specific group you wish)

Missouri River Climate II

[Group Library](#)

[Manage Profile](#) · [Manage Members](#) · [Manage Library](#)

Members	1
Group Type	Private
Group Library	Only members can view and edit

Philippines Disasters

[Group Library](#)

[Manage Profile](#) · [Manage Members](#) · [Manage Library](#)

Members	1
Group Type	Private
Group Library	Only members can view and edit

- Send more invitations

zotero Welcome, [ksmeehan](#) · S

[Home](#) [My Library](#) [Groups](#) [People](#) [Documentation](#) [Forums](#) [Get Involved](#)

[Home](#) > [Groups](#) > [Philippines Disasters](#) > Settings

Philippines Disasters: Members Settings

[Group Settings](#) · [Members Settings](#) · [Library Settings](#)

Current Members

Username	Full Name	Member Since
ksmeehan	ksmeehan	2016-06-08 14:29:01

[Update Roles](#)

Member Invitations

No pending invitations.

[Send More Invitations](#)

[Table of Contents](#)

- Add emails in the first box (and a message in the second box if you wish).
- Invite Members

Invite Members

Group: [Philippines Disasters](#)

Invite Members



Separate email addresses or zotero usernames with a comma.

Personal Message (optional)



Enter a personal message to include along with instructions on how to join your group.

[Invite Members](#)

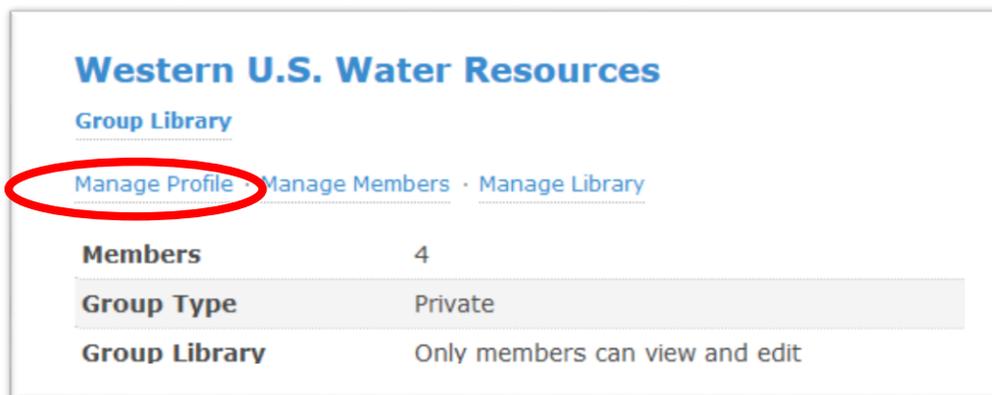
- You'll now be brought to the Member Settings Page of that group, where you can now update roles (once invited members accept).
- Update roles (once they have accepted email invitations)

- **Update roles of Members of a Group**

- [Log in](#) to your personal profile online.
- Groups tab
- Manage members (under the specific group you wish)
- Select Role from drop-down menu for each member
- Update Roles

- **Transfer Ownership of a Group**

- [Log in](#) to your personal profile online.
- Groups tab
- Manage Profile



Western U.S. Water Resources

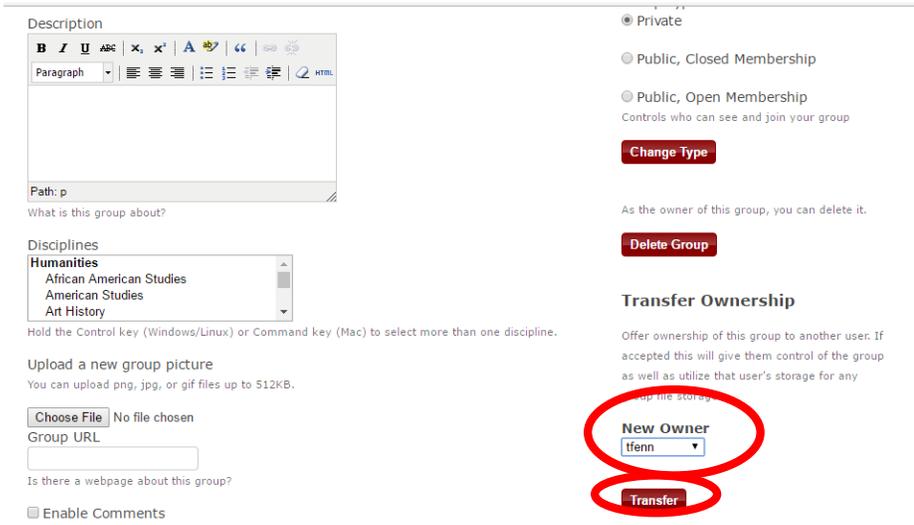
[Group Library](#)

[Manage Profile](#) · [Manage Members](#) · [Manage Library](#)

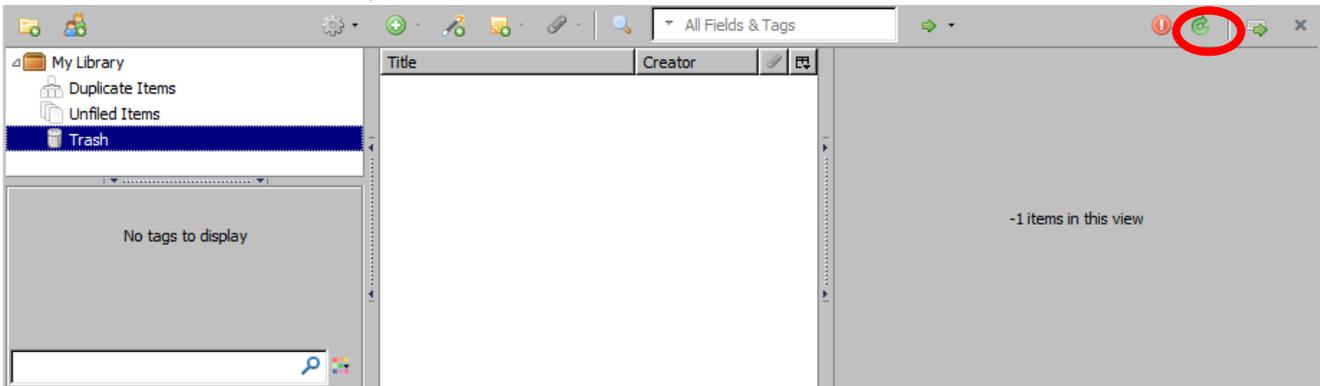
Members	4
Group Type	Private
Group Library	Only members can view and edit

[Table of Contents](#)

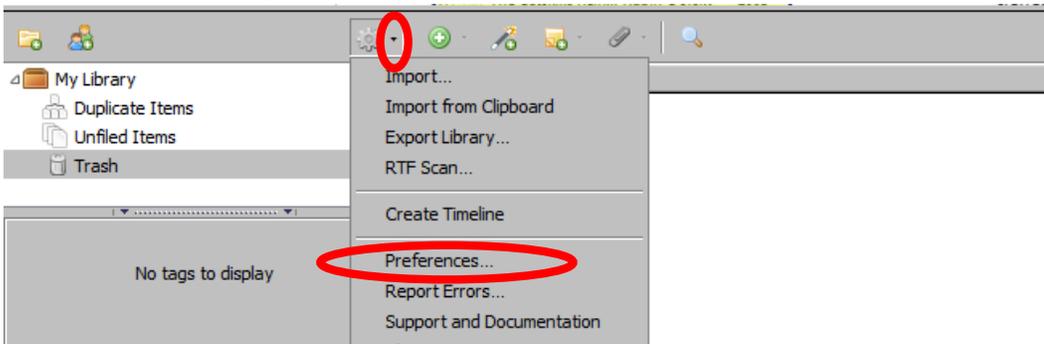
- Select new owner from drop down menu on lower right hand side of screen.
- Click transfer



- **Sync Zotero Desktop Client (Zotero for Firefox or Standalone) with Zotero Server**
 - Click on the sync button.

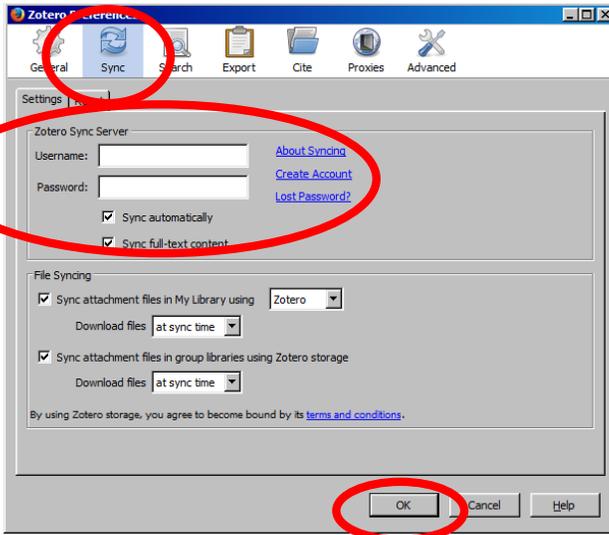


- **Set Zotero Preferences**
 - Click on the arrow next to Settings/Actions icon in either Standalone or for Firefox.
 - Click preferences



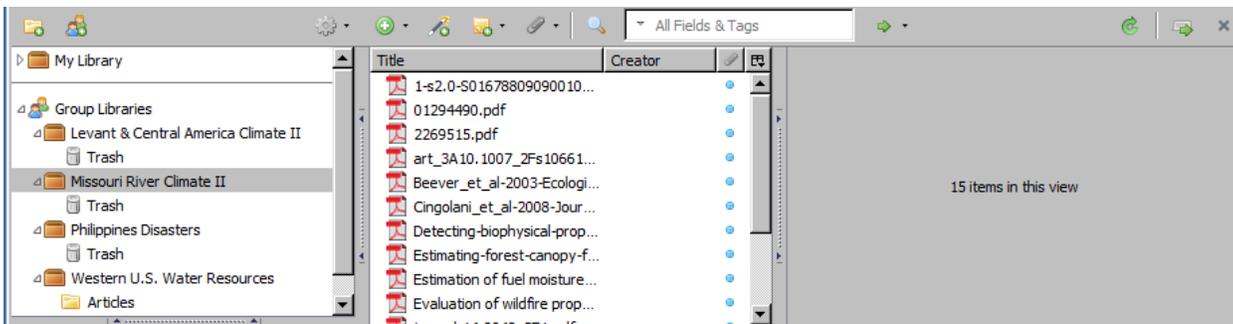
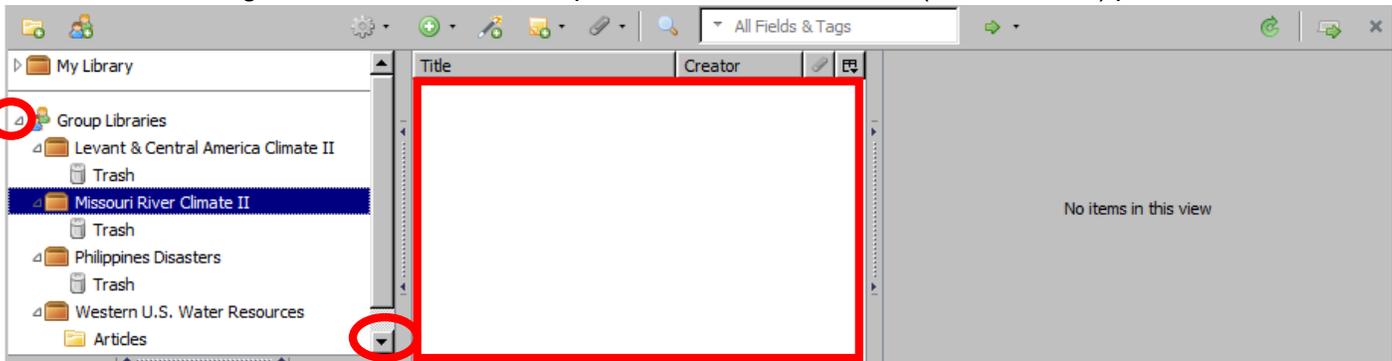
[Table of Contents](#)

- Enter username and password information
- Sync automatically and Sync full-text content should be checked



● Add File to Zotero Group Library & Retrieve Metadata

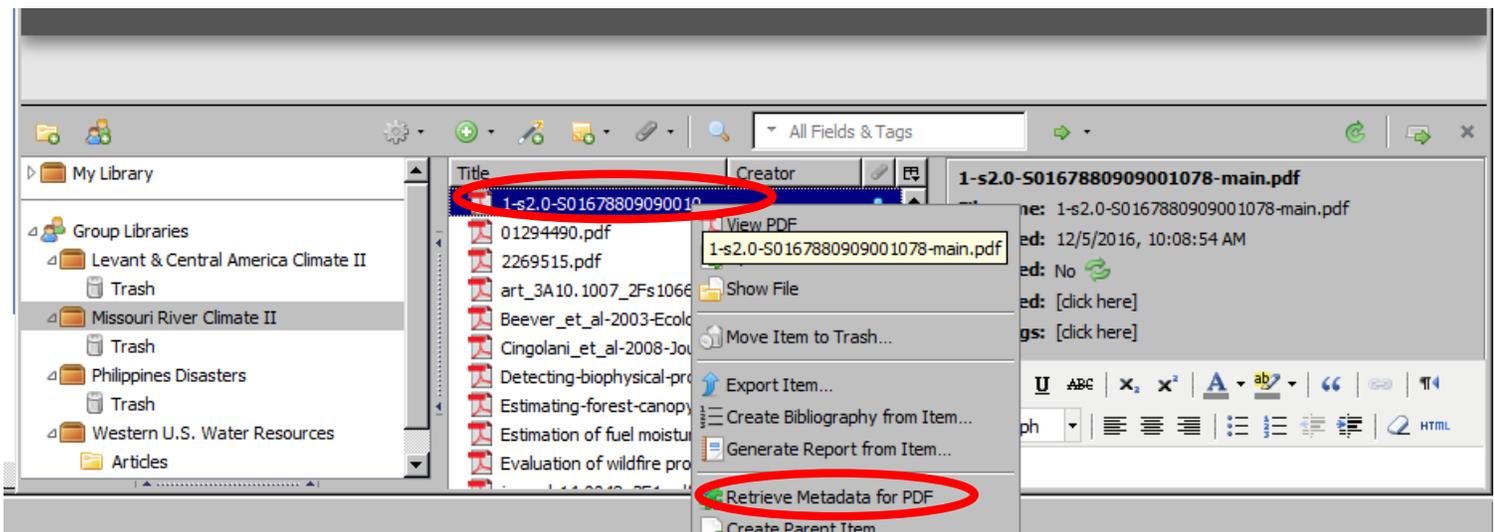
- Open Zotero (Either Standalone or Zotero for Firefox)
- Follow [Sync Zotero instructions](#)
- Click on triangle next to Group Libraries
- Scroll down the left pane to select the folder you wish to add items to
- Drag PDFs from Windows Explorer into Zotero's middle (white section) pane



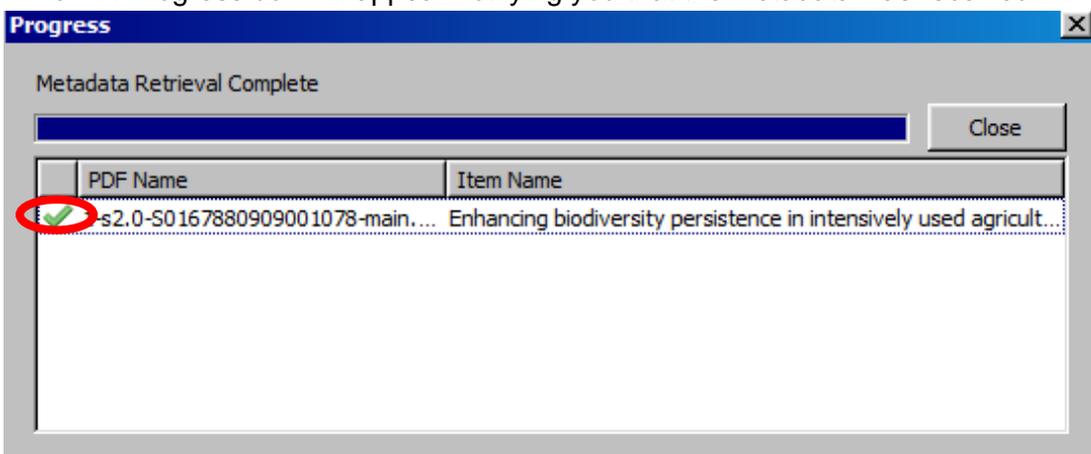
[Table of Contents](#)

Table of Contents

- Right click on newly added article
- Retrieve Metadata for PDF



- A Progress box will appear notifying you that the metadata was received.



- Retrieving the metadata filled in the info section of the file.

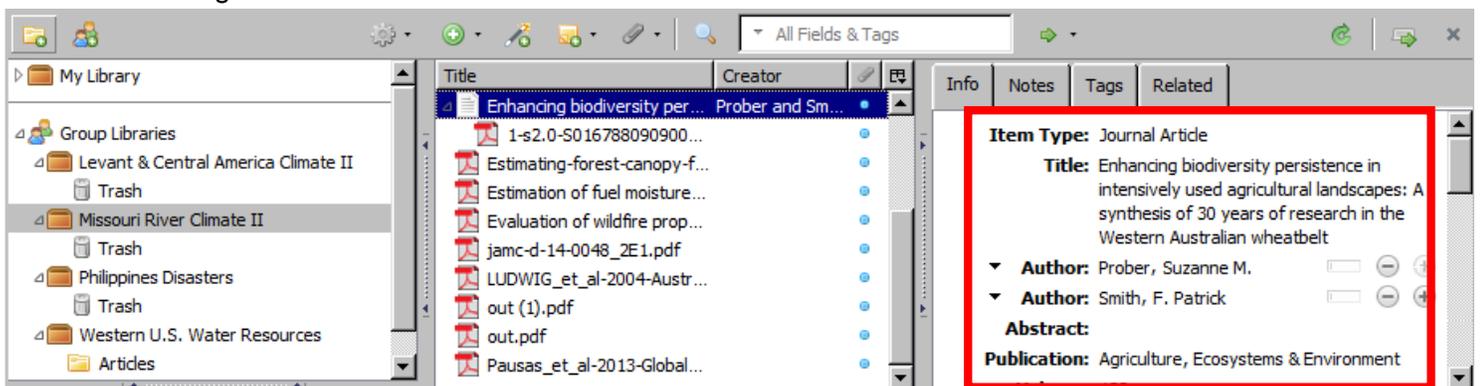
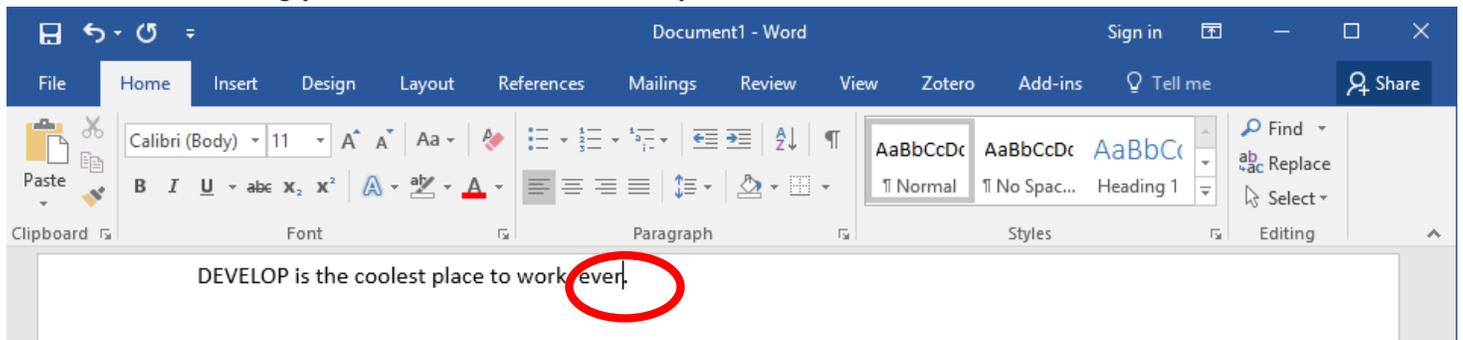


Table of Contents

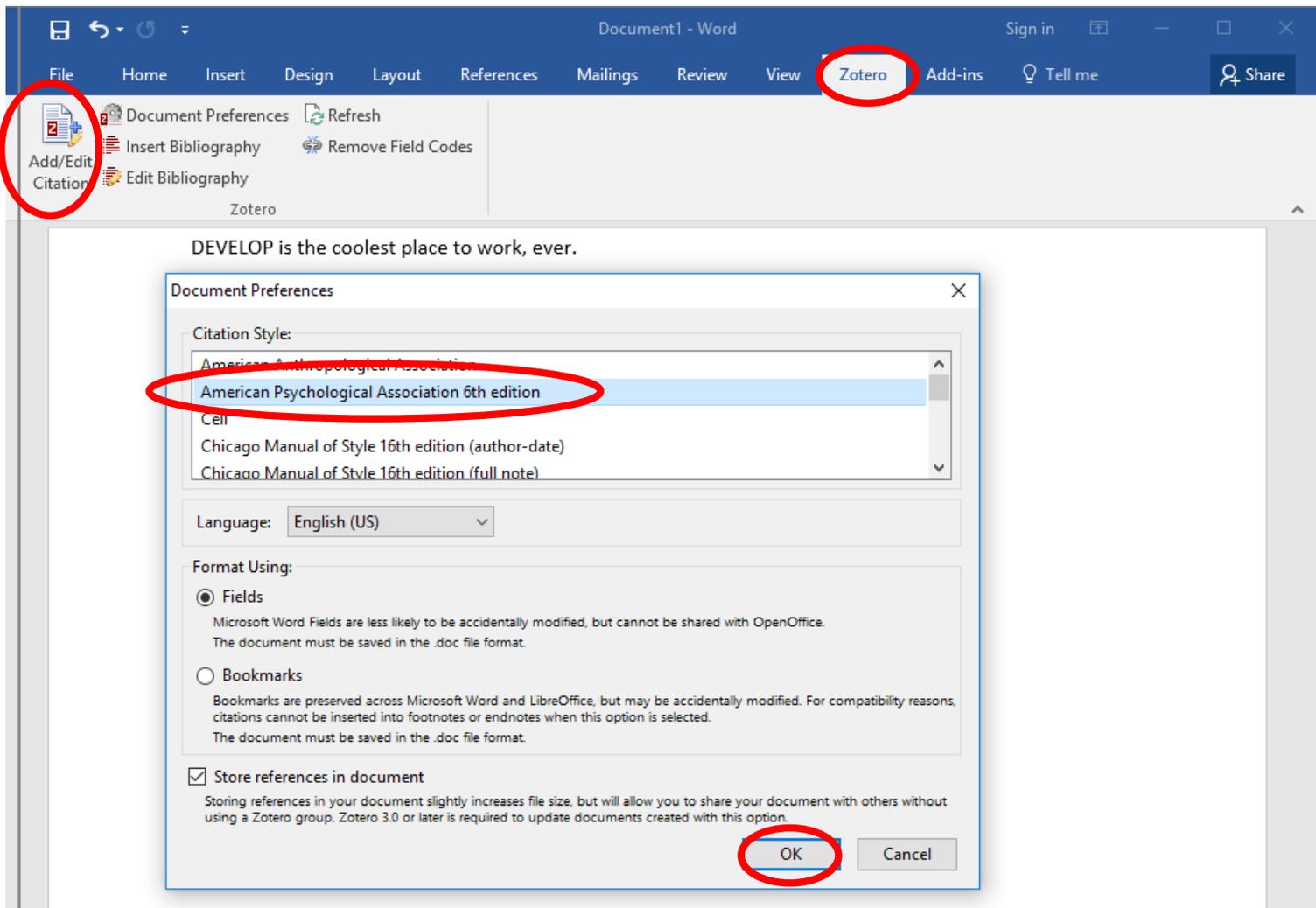
[Table of Contents](#)

- **Create In-text citation in Word**

- Placing your cursor in the text where you'd like the citation to be added.



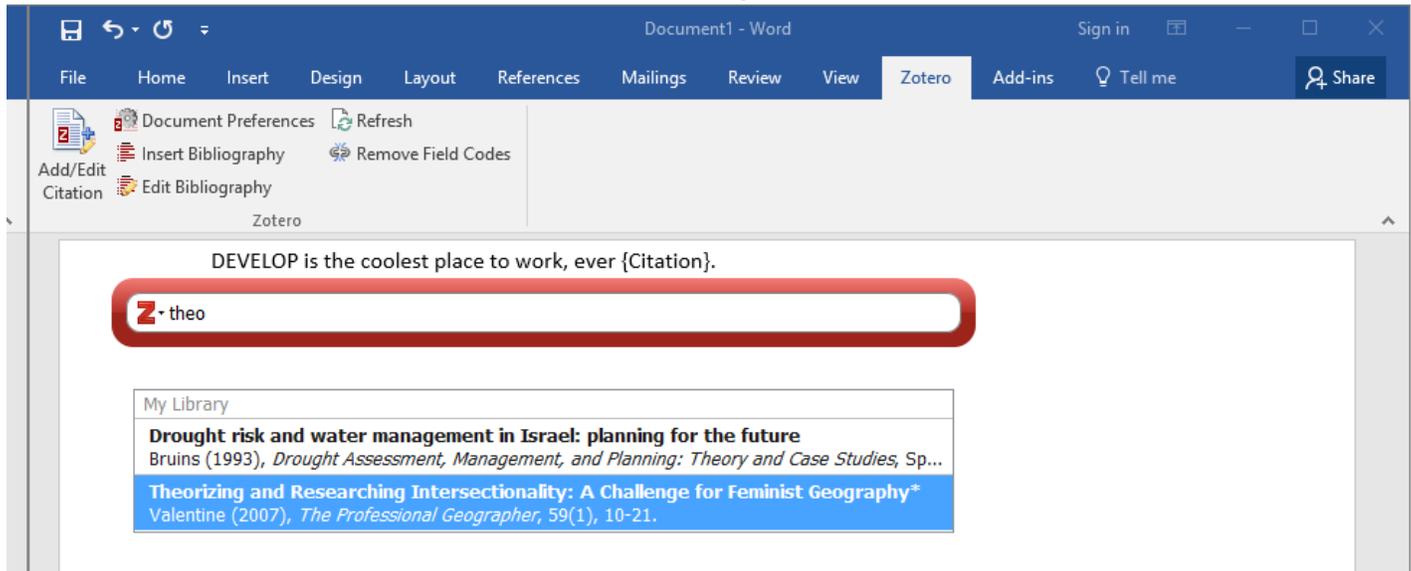
- Click the Zotero tab in the top ribbon.
- Click the Add citation icon, located in the upper left side of the ribbon.
- Select APA 6th edition as the citation style.



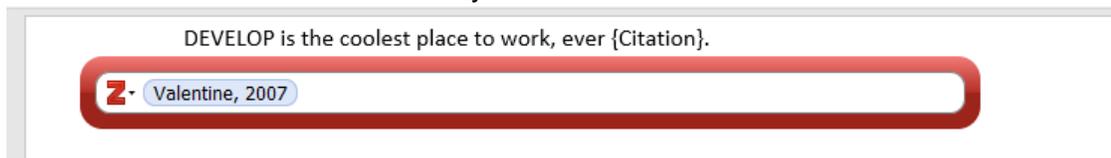
[Table of Contents](#)

[Table of Contents](#)

- In the red box that comes up, type in either the name of the article, or the authors. Zotero will bring up some options and you can choose the article you wish to reference.
- Double click on the article you are referring to.

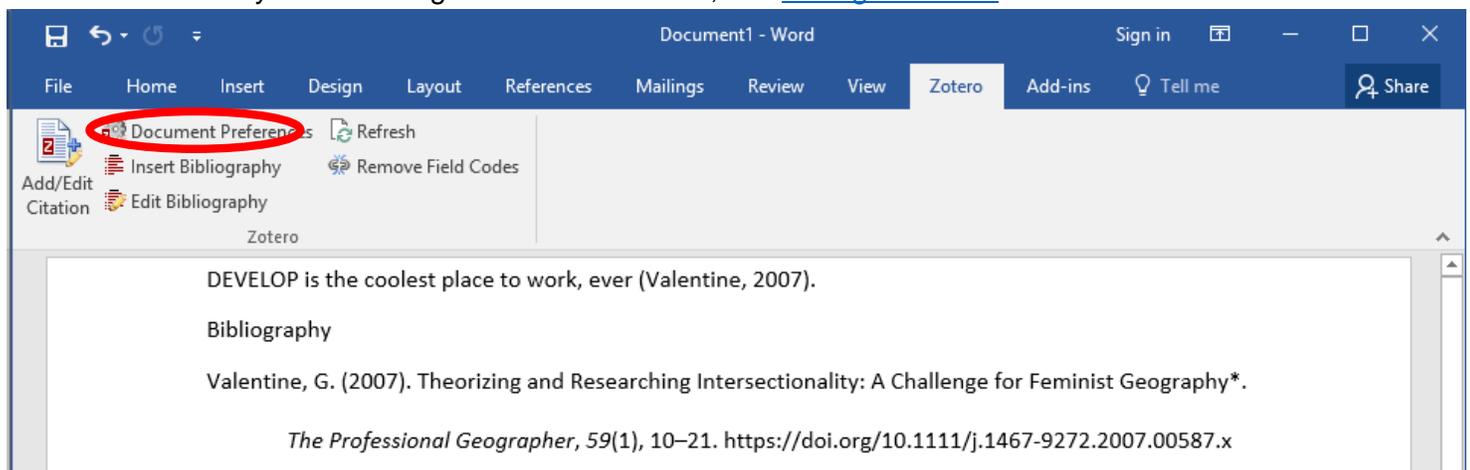


- The citation will appear in the red box (giving you a chance to edit it).
 - (If there are errors, don't edit it here, instead see [editing metadata](#).)
 - Click enter key



• Create Bibliography in Word

- Place your cursor where you'd like to insert a bibliography.
- Click the Zotero tab in the top ribbon.
- Click the Add bibliography icon, located in the left side of the ribbon.
- If any information generated is incorrect, see [editing metadata](#).

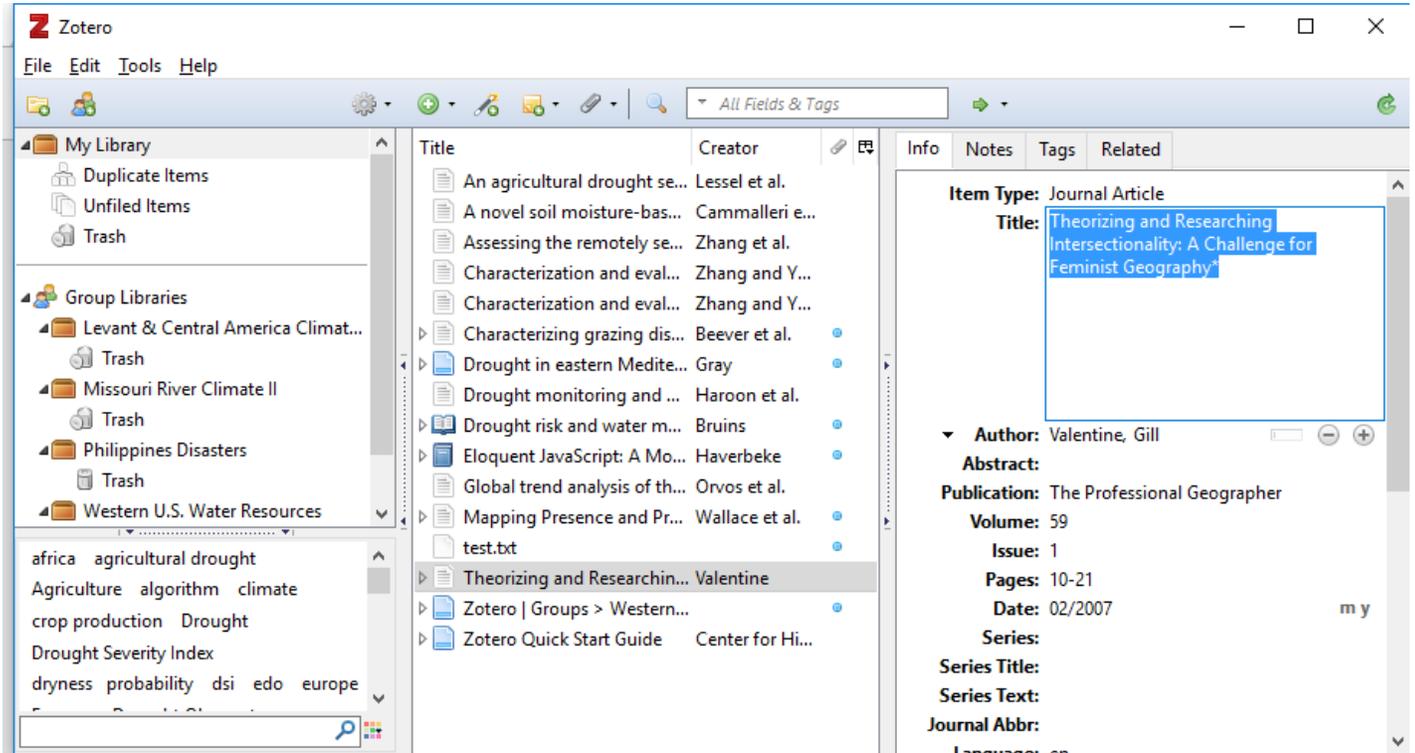


[Table of Contents](#)

[Table of Contents](#)

- **Editing Metadata**

- In the info tab on the right hand side of the Standalone or for Firefox, click in the area you wish to change and manually make edits here. This will ensure any generated citations or bibliographies will be correct.



- **Additional Training Resources**

- <https://www.zotero.org/support/>
- <http://libguides.northwestern.edu/c.php?g=114874&p=750362>

Email develop.geoinformatics@gmail.com for troubleshooting questions, or drop in during Open Hours on Mondays and Wednesdays from 1-3 PM EDT.