ZOTERO Instructions

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• Overview

- o 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)

- Open Executable
- Select Run

Open File	Open File - Security Warning									
Do you	want to run this file?									
	Name: kelly.meehan\Downloads\Firefox Setup 50.0.2.exe Publisher: Mozilla Corporation Type: Application From: C:\Users\kelly.meehan\Downloads\Firefox Setup 5 Run Cancel									
Ì	While files from the Internet can be useful, this file type can potentially harm your computer. Only run software from publishers you trust. <u>What's the risk?</u>									

- 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









<u>C</u>ancel

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



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 <u>set your preferences</u> 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



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



- o 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

• 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:

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• 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



- In the <u>Groups tab</u>, you'll have listed all of the groups that you're a part of.
- Create new group

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Members	4		
Group Type	Private		
Group Library	Only members can view and edit		
Missouri Rive	r Climate II		
Group Library			
Manage Profile · Manage	e Members · Manage Library		

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





Add Members to Group

- Log in to your personal profile online.
- Groups tab
- Manage members (under the specific group you wish)





Home > Groups > Philippines Disasters > Settings

Philippines Disasters: Members Settings

Group Settings + Members Settings + Library Settings

Current Members

Username	Full Name	Member Since							
<u>ksmeehan</u>	ksmeehan	2016-06-08 14:29:01							
Update Roles									
Member Invita	ations								
No pending invitations.	No pending invitations.								
Send More Invitations	Send More Invitations								

- 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

Group Library	
Manage Profile • Manag	e Members · Manage Library
Members	4
Members Group Type	4 Private

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

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	Public, Open Membership Controls who can see and join your group
	Change Type
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What is this group about?	As the owner of this group, you can delete it.
Disciplines	Delete Group
Humanities African American Studies Armerican Studies Art History 🗸	Transfer Ownership
Hold the Control key (Windows/Linux) or Command key (Mac) to select more than one discipline. Upload a new group picture You can upload png, jpg, or gif files up to 512KB.	Offer ownership of this group to another user. If accepted this will give them control of the group as well as utilize that user's storage for any
Choose File No file chosen Group URL	New Owner Ifenn
Is there a webpage about this group?	Transfer
Enable Comments	

- 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



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

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- Add File to Zotero Group Library & Retrieve Metadata
 - Open Zotero (Either Standalone or Zotero for Firefox)
 - Follow <u>Sync Zotero instructions</u>
 - 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





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

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

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



• Create In-text citation in Word

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

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- \circ $\;$ 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.

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- 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.

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- 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

DEVELOP is the coolest place to work, ever {Citation}.

Z• Valentine, 2007

- 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.

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- Editing Metadata
 - It the info tab on the right hand side of the Stanealone 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.

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

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