Cite Your Sources Easier + Faster with Zotero

The basics
1. Register for a Zotero account: zotero.org/user/register
2. Download + install Zotero 6.0: zotero.org/download
3. Install Zotero Connector in your browser: zotero.org/download
4. Open the Zotero application. Login + sync your Zotero account:
   - On a PC: Select the "Edit" menu + choose "Preferences."
   - On a Mac: Select the "Zotero" menu + choose "Preferences."
   - Select the "Sync" tab, then login with your Zotero username + password.

Add sources to Zotero
A. Use the Zotero Connector icon in your web browser to add sources from the web. (In Zotero, click "Sync" to sync your new sources to your Zotero library.)
B. Drag + drop a PDF into Zotero.
C. Use "Add Item(s) By Identifier" (magic wand) option to add by ISBN (for books) or DOI (for articles).
D. Manually add item using green plus icon.

Organize sources
A. Add items to folders (called Collections in Zotero) by drag + drop.
B. Add tags to an item, and browse/filter your tag cluster in Zotero.
C. To identify and merge duplicate sources, click on Duplicate Items in Zotero.
D. Customize the metadata visible in your library using the "graph" icon (top right of the middle pane.).

Create references with Zotero
A. Drag + drop method (citations and references, but won't automatically update your biblibography):
   1. In Zotero, go to Preferences > Export to choose the citation style.
   2. Open a word document (e.g. MS Word, Google Docs).
   3. Drag source(s) from your Zotero library into the document to create references.
   4. Press Shift and drag source(s) from your library into the document to create in-text citations.
B. Word or GoogleDocs plug-in method (citations and references – automatic syncing/updating):
   a. Open a new document. Find the Zotero tab in the ribbon at the top. (If it's missing from Word, quit Word + restart it to install the plug-in.)
   b. Click "Document Preferences" to choose or change the citation style.
   c. Insert in-text citations with "Add/Edit Citation."
   d. Once you have in-text citations, insert your reference list with "Insert Bibliography."

Other Features
- Create a group (public or private): www.zotero.org/groups/
- Social features: follow users or libraries, create profiles, message users
- Bulk import (such as for systematic review) and export options
- Add a citation style (over 8000 available)
- Edit and customize a citation style
- ISBN scanner on iPad or iPhone (third party app)
- Mobile options: bookmarklet for browsers, or third party apps (Android and iOS)
- Zotero flags articles that have been retracted (via RetractionWatch)
- Purchase additional storage, or explore plugins with flexible storage options
- Other plugins/extensions for other functionality/features

Need help after today? Contact the citation management experts: <u>citation-managers@sfu.ca</u>