Cite Your Sources Easier + Faster with Zotero

The basics
1. Register for a Zotero account: zotero.org/user/register
2. Download + install Zotero 5.0: zotero.org/download
3. Install Zotero Connector: zotero.org/download
4. Open the Zotero application. Login + sync your Zotero account:
   ○ On a PC: Select the "Edit" menu + choose "Preferences". Select the "Sync" tab, then login with your Zotero username + password.
   ○ On a Mac: Select the "Zotero" menu + choose "Preferences". Select the "Sync" tab, then login with your Zotero username + password.

Add sources to Zotero (3 ways)
A. Use the Zotero icon in your browser to add sources from the web.
B. Drag + drop a PDF into Zotero. (If the bibliographic information isn't automatically extracted from the PDF, right-click + choose "Retrieve metadata for PDF.")
C. Use "Add Item(s) By Identifier" option to add by ISBN (for books) or DOI (for articles).

Organize sources
A. Add items to folders (called Collections in Zotero).
B. Add tags to an item, and browse/filter your tag cluster in Zotero.
C. To identify and delete duplicate sources, click on Duplicate Items.

Create references with Zotero (2 ways)
A. Drag + drop method:
   1. In Zotero, go to Edit > Preferences > Cite to choose to change 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.
B. Word plug-in method:
   1. Open a new MS Word document. Find the Zotero tab in the ribbon at the top. (If it's missing, quit Word + restart it to install the Word plug-in.)
   2. Click "Document Preferences" to choose or change the citation style.
   3. Insert in-text citations with "Add/Edit Citation."
   4. Once you have several in-text citations, insert your reference list with "Add/Edit Bibliography."

Create a group
1. In Zotero, use "New Library" (briefcase icon) to create a new group.
2. In the window that appears, name + select your group type.
3. Go to Member Settings to add team members to your group.
4. In Zotero, drag + drop references into your group library to share with members.

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