

## USING ZOTERO TO SAVE, CITE, AND SHARE RESEARCH WITH YOUR TEAM

### Getting Started:

1. Register for a Zotero account: [zotero.org/user/register](https://zotero.org/user/register)
2. Download + install Zotero 5.0: [zotero.org/download](https://zotero.org/download)
3. Install Zotero Connector in your browser: [zotero.org/download](https://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 (Overview)

- A. Use the Zotero Connector icon in your web browser in the Community Scholars Portal to add sources from the web
- 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.

### Add sources to Zotero (Community Scholars Portal)

- A. Use the Community Scholars Portal to search for an item:  
<https://www.lib.sfu.ca/about/overview/services-you/community-scholars>
- B. Follow the link(s) until you reach the source of the item
- C. Click on the Zotero Connector icon to add the source to the library/collection you have highlighted
- D. Check that the metadata (information about author, title, etc.) has been added correctly in Zotero

### Organize sources

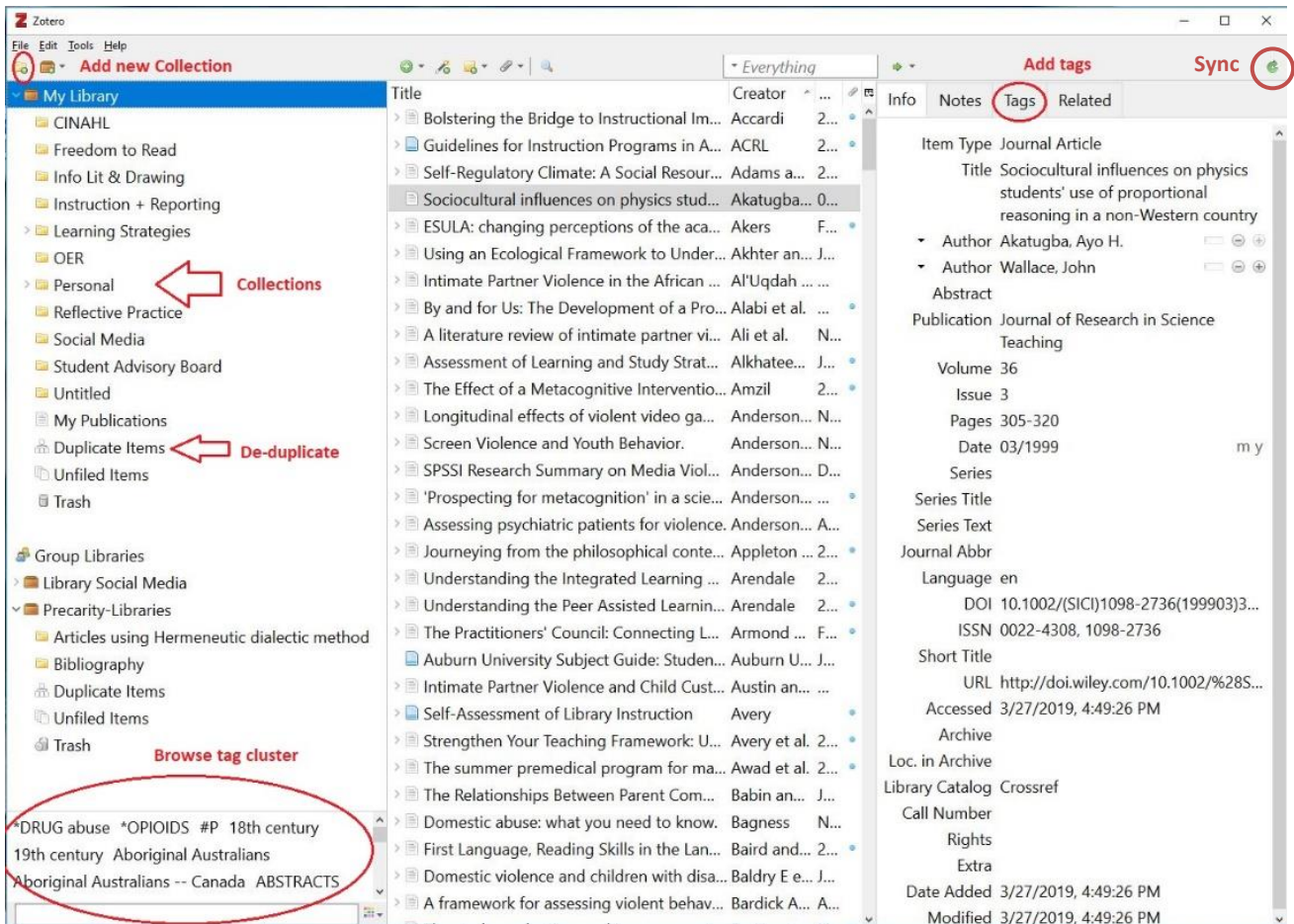
- A. Add items to folders (called Collections in Zotero) by drag + drop.
- B. Add tags to an item and browse/filter your tag cluster in Zotero.

### Create references with Zotero

- A. Drag + drop method (citations and references, but won't automatically update your bibliography):
  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. Hold 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/](https://www.zotero.org/groups/)
- Social features: follow users or libraries, create profiles, message users
- Mobile options: bookmarklet for browsers, or third party apps (Android and iOS)



**Need help after today?** Contact your Community Scholars Librarian: [hdefores@sfu.ca](mailto:hdefores@sfu.ca)  
Contact us by email - we can set up a phone or zoom meeting.