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

Getting Started:
1. Register for a Zotero account: zotero.org/user/register
2. Download + install Zotero 5.0: 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 (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 biblography):
   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/
- Social features: follow users or libraries, create profiles, message users
- Mobile options: bookmarklet for browsers, or third party apps (Android and iOS)
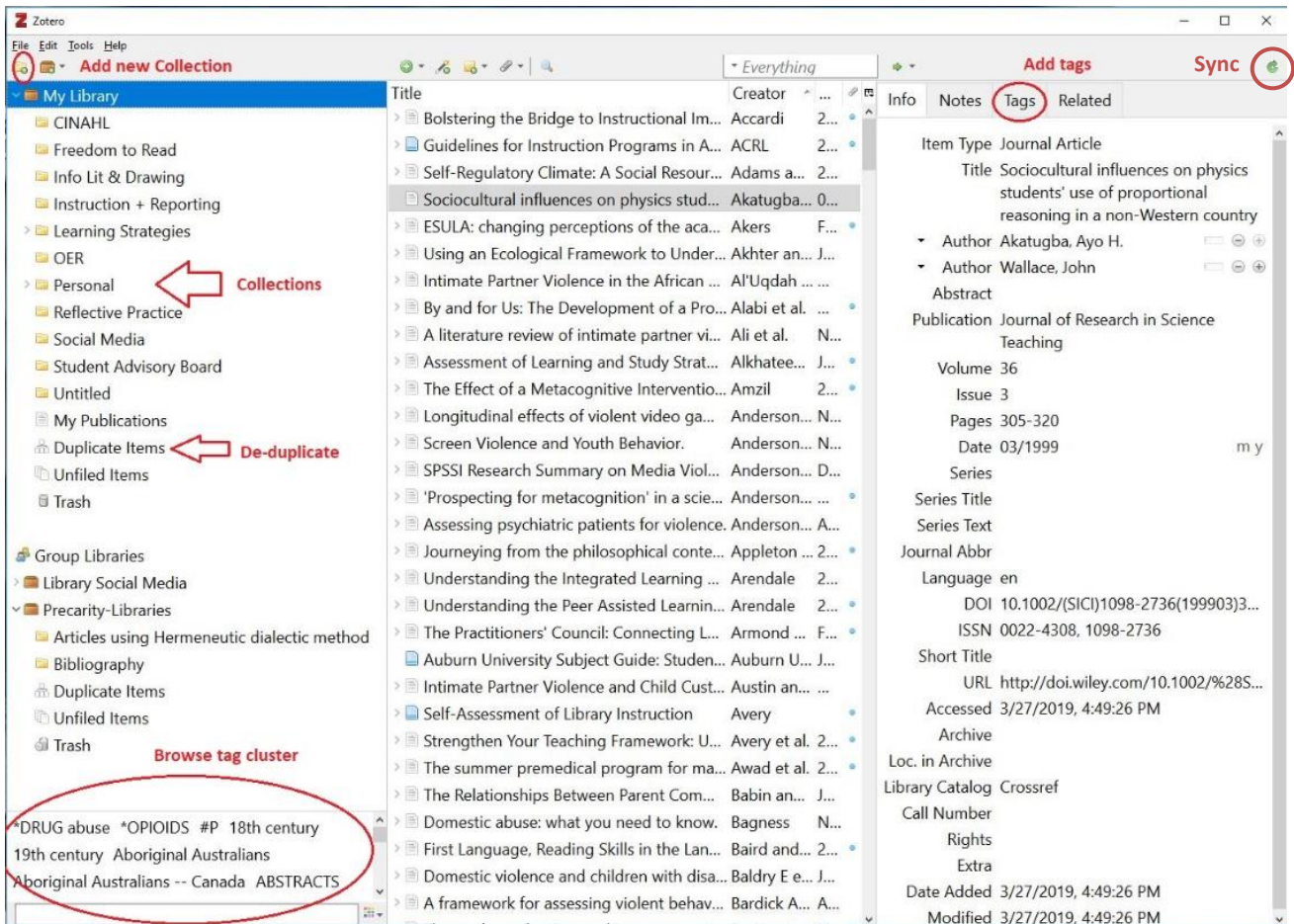
Need help after today? Contact your Community Scholars Librarian: comschol@sfu.ca

Contact us by email, or set up a phone or in-person appointment.