

**Using Zotero Reference Manager 5.0
with Microsoft Word / Google Docs Plug-in
4th ed. Rev.**

Note: If you need any assistance is setting up or using Zotero please contact:

Ashley Thomson

Email: athomson@laurentian.ca

Text: 705-665-2074

1. Definition

Zotero is a free, easy-to-use tool that stores, organizes, and cites your references conveniently. With Zotero you can:

- gather, save, and organize your references as you're doing your research;
- insert the references you have saved into your paper as you write it—and generate a bibliography at the end of your paper based on the references you have cited—both intext citations and bibliography in whatever citation style you want;
- share your research sources with colleagues, or the world.

Zotero offers 300MB of free online storage. You have the option to purchase additional storage, but you probably don't need it if you use the set-up suggestions in this guide.

2. Get Started

On your Windows or Apple machine¹ :

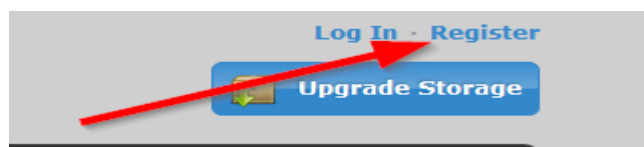
i. Download

a) Chrome or Firefox² and

b) Microsoft Word, either Mac OS or Windows version The *latest edition* of Microsoft's Office Suite which includes Word, is available **at no charge (and with automatic updates and no expiry date) to students or faculty** from <https://www.microsoft.com/en-ca/education/products/office/default.aspx> or may be accessed by typing in **Microsoft Office Education Free** into Google.

ii. Open one the following browsers: Chrome / Firefox and then go to <https://zotero.org/>.

iii. Click on **Download** and then click on **Register**. You can use any username and password you like. Zotero will authenticate your account by sending an email confirmation link to the email address you have chosen. Write down your username and password at the top of the next page.



¹ Note: Zotero does not yet work on Chromebooks.

² Note: Zotero is NOT compatible with Internet Explorer. While it is supposed to work with Safari (Apple version, not Windows) and Opera (with the Chrome connector), as well as Microsoft Edge (with the Chrome connector) it seems to work best with Chrome and Firefox.

Username: _____ Password: _____

- iv. **After registration** return to the download page (<https://www.zotero.org/download/>)

Then:

- a. **Download Zotero 5.0** for Windows (or Mac OS). This will appear on your desktop after installation.



- b. **Install the connector for either Chrome or Firefox.** Zotero Connectors automatically sense content as you browse the web and allow you to save it to Zotero with a single click (See bottom of page 4 of this handout for the various icons you will see once you have set up the connector).

3. Set Up

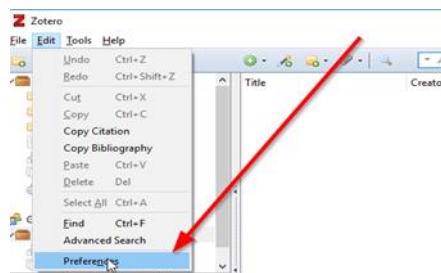
Introduction: The purpose of the first four steps that follow is to prevent .PDFs and other attachments from automatically loading into your Zotero account. These take up a lot of space and if they are included, you will soon exceed your 300 MG storage limit. [If you are interested in how much storage you are using, click on Settings at the top of the screen once you have



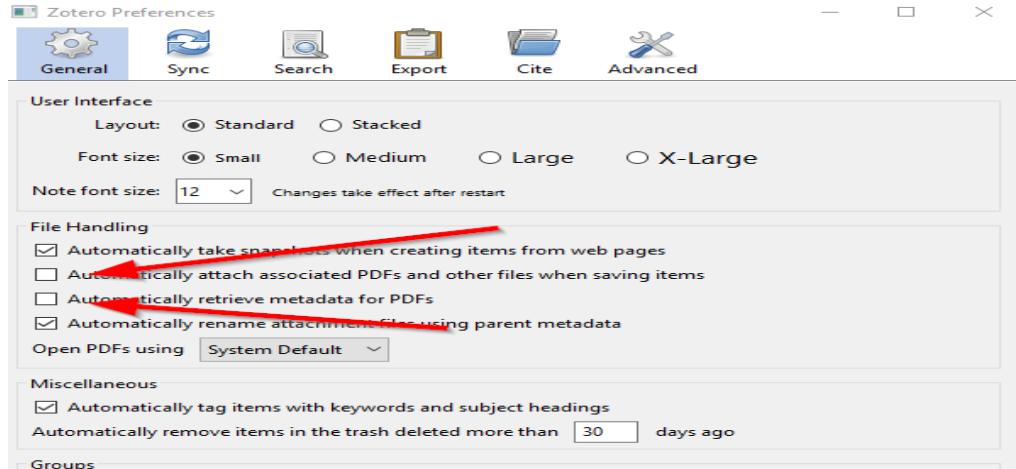
logged into Zotero.org. Then click on storage.]

Fortunately, there is a work-around which will allow you to access the full-text of documents you want to save (**See step v in this section as well as See 5.iii in the handout**)

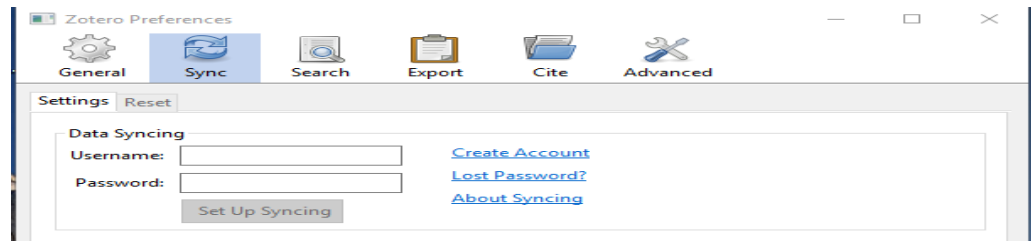
- i. **Open** the Zotero icon on your desktop. At the top left, click on **Edit** then select **Preferences**. (On an Apple machine, Click **Zotero** on the top left see find Preferences, second line down)



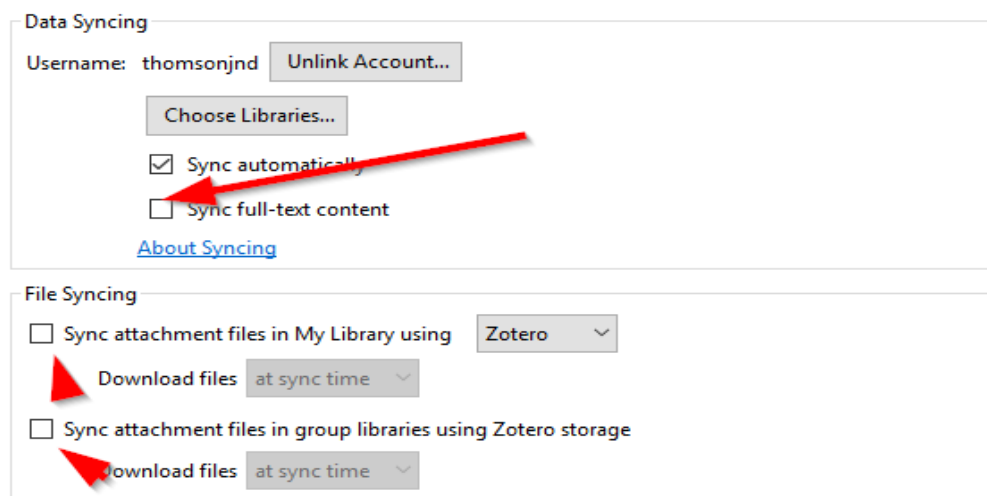
- ii. At the **General** tab (top left), **uncheck the options** that allow for the automatic attachment of .PDFs as well as the automatic retrieval of metadata. To repeat, while there are no limits on the data sync, you only are given 300MB of free storage space for your attachments.



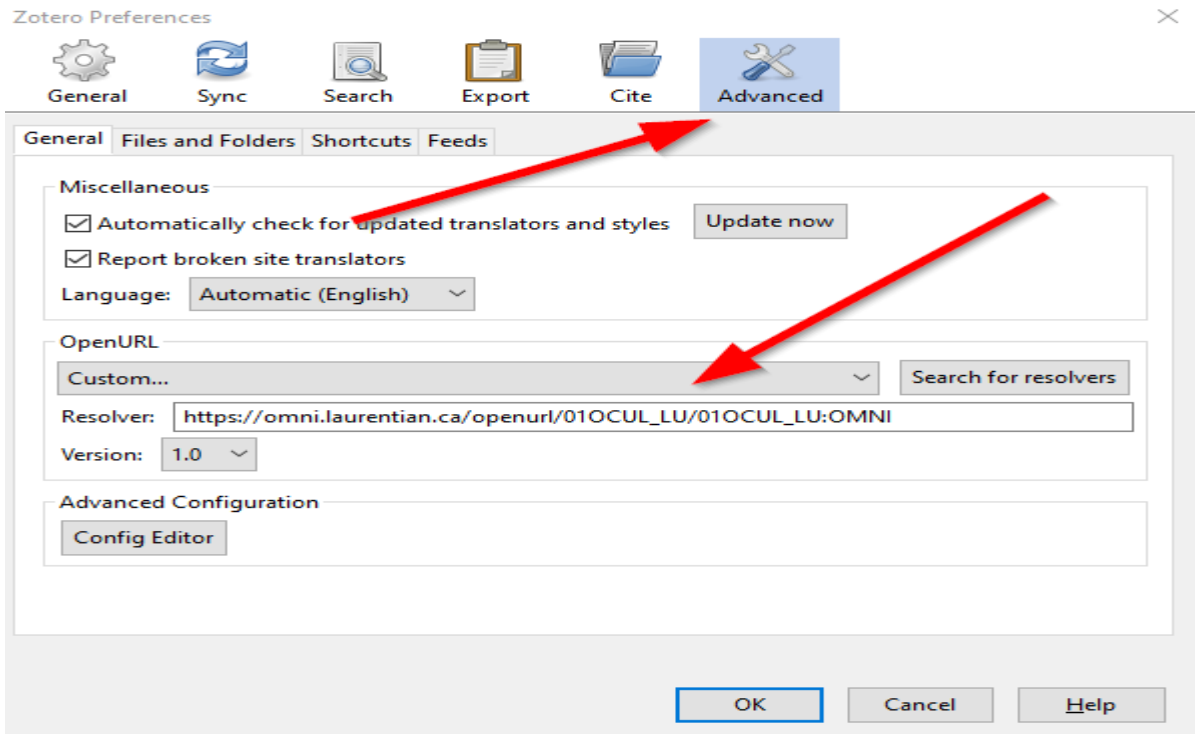
- iii. **Set your username and password** on the **Sync** tab in the Zotero preferences. This will allow you to access Zotero on whatever computer you happen to be using.



- iv. Click **Set Up Syncing** and then unclick **Sync Full-Text Content** as well as **Sync Attachment files**.



- v. Click **Advanced** and then in **Resolver** line type: <https://sfx.scholarsportal.info/laurentian>. This will enable Zotero's Library Lookup service to find full-text documents licensed by Laurentian University. (See 5. lii of this handout)



4. Get References into Zotero

Introduction: Citations can be imported into Zotero from many databases and websites.³ How this is done will depend on where the citation is coming from.





- i. **Open Zotero** on your Desktop.
- ii. **Create a Collection:** Collections can function as subject folders that allow you to place all your references related to the same topic or assignment in one place. To create a collection, click on Collection Icon and name the Collection:



Once a collection has been created, references will be added to whichever collection is highlighted in your Zotero library. Note: References can sit in more than one Collection at a time and *all your references will appear in the My Library collection*

- iii. Most of the time, including with Ebsco, ProQuest, and Ovid platform databases, as well as Google Scholar, you should be able to add references to Zotero directly. The icons will change depending on the item. **Clicking these icons will save the item to your Zotero Collection.**

³ Don't try to download directly from a .pdf.


Book item	Website Item	Journal Item	List of Items
			


iv. Exceptions

Gale Databases use the normal "export citations" feature. In such cases:

- Mark citations to be Saved;
- In the Saved Citations folder, click Citation Tools;
- Click Export and then select Procite (as a format);
- Download and save on your desk-top;
- Use the "Import..." option in the Zotero File menu to load them into your account.

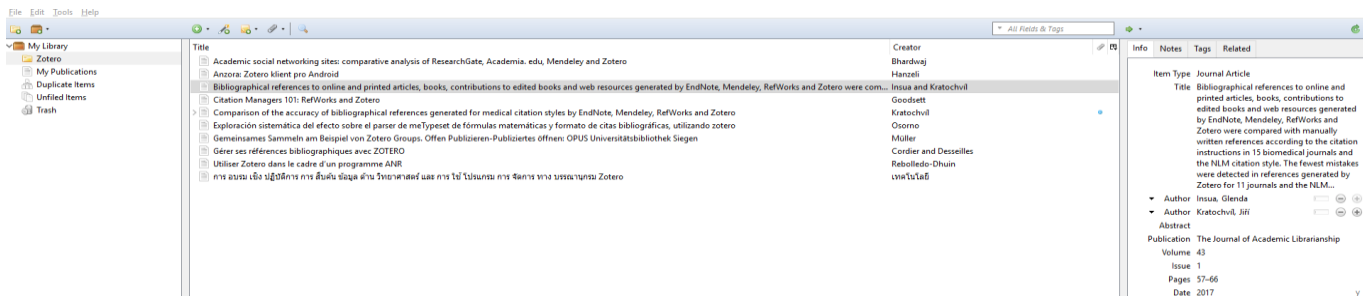
Engineering Village Databases also use normal "export citations" feature. In such cases:

- Mark Citations;
- Click Download icon  and then select BibTex (as a format);
- Click Download record(s) and the Zotero will pop up allowing you to import your citations.

- v. You can also **Add references manually** by clicking on the  icon and then filling in the blanks on the left-hand side of the page. This is not recommended not only because it is time consuming but because mistakes appear. Best alternative for articles—search by article *title* in Google Scholar; for books, use [WorldCat](#).

5. Work within Zotero

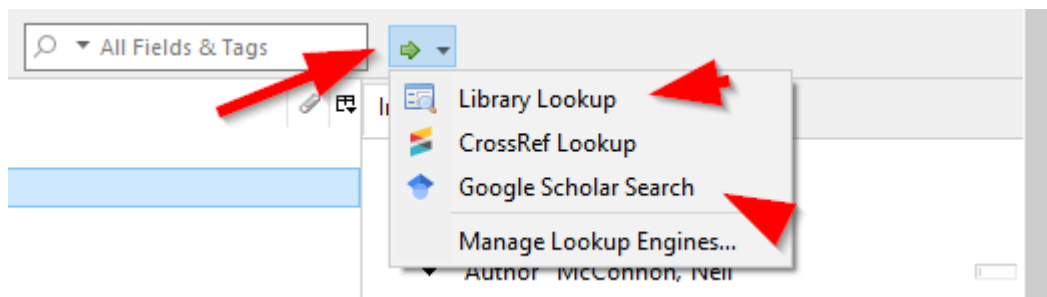
Introduction: Your Zotero library contains three columns. The left column is an overview of your collection (s), the middle column displays a selected collection's content, and the right column displays the details of a selected item



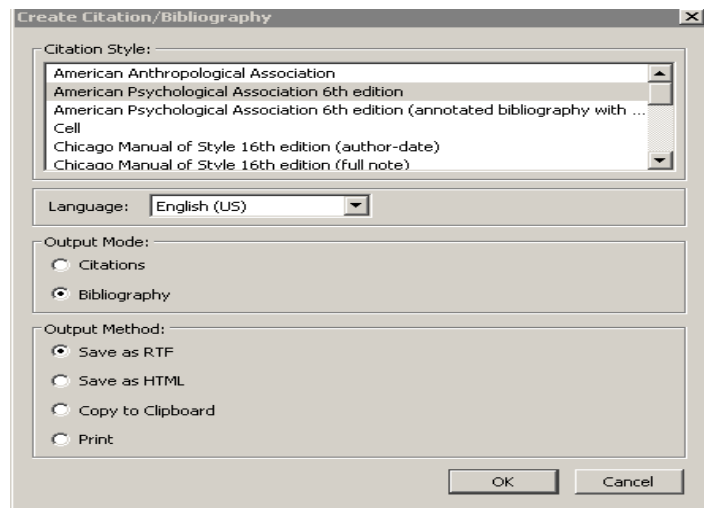
- Duplicates:** To see whether you have duplicates, click on the Duplicates collection. This will allow you to merge duplicates one at a time.

Important: All references are in the My Library collection. Each reference may also be placed in one or more collections—so if you have five collections, the same reference could appear five times. *These are not considered duplicates!!*

- ii. **Edit:** Zotero facilitates the management and formatting of citations. However, *you should always check the citation data as well as the formatting of your in-text citations and the generated bibliography, to ensure the completeness and accuracy of the information. You can edit any citation from the column to the right.*
- iii. **Access Full-Text of an Article:** In the middle column, move your cursor over the article you want to read, then click the **arrow at the top** of the column to the right. You can select **Library Lookup** or **Google Scholar Search**. Library Lookup works if you have followed 3 v. in the Set-Up Instructions.



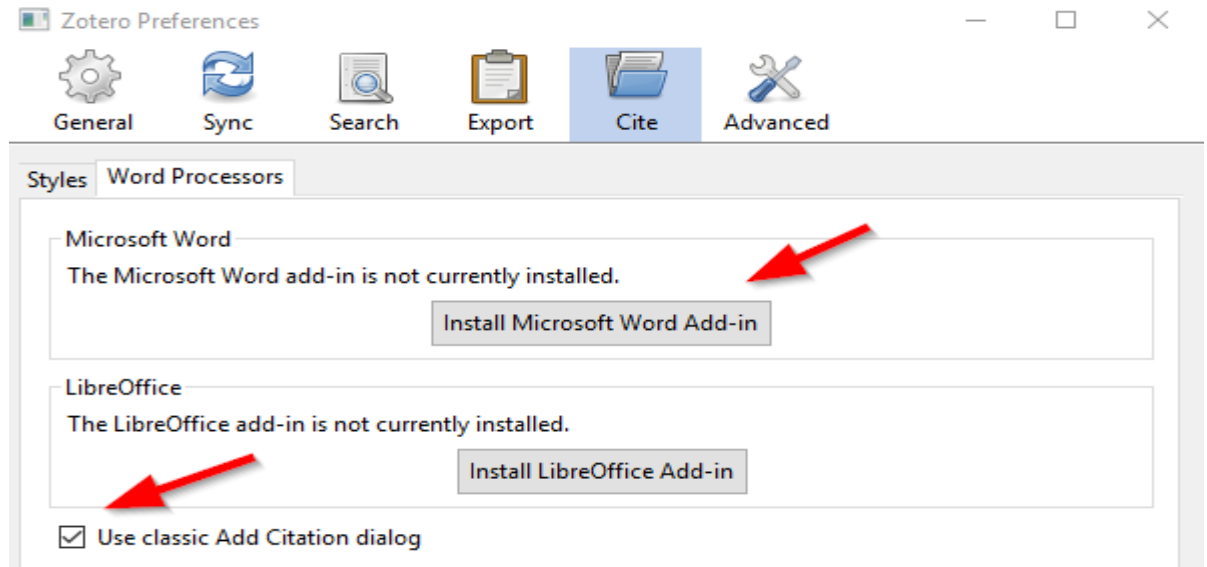
- iv. **Create a Bibliography:**
 - a. Within a collection, select items that you want to include.
 - b. Right click your mouse and then left click **Create Bibliography from items**
 - c. Pick your Citation Style / Language / Output Mode and Output Method. Save on your Desktop.



6. Installing Zotero in a Google Docs / Microsoft Word

Zotero can automatically format citations and create bibliographies in documents, assignments, manuscripts, and more in a multitude of different citation styles. Before you can use this functionality, you must **install Zotero's plug.**

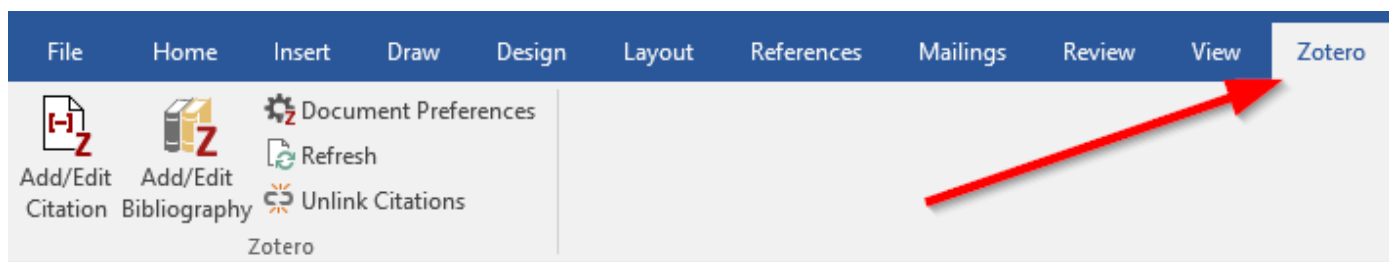
- i. **Google Docs:** When you have installed the Zotero connector in Chrome or Firefox, the Zotero plug-in will appear automatically in Google Docs
- ii. **MS Word:** While Zotero also supports LibreOffice you might as well use Word since it is now free as part of the Office suite. The Zotero plugin enables Zotero to create and automatically update your bibliography and citations in your word processor. Install the plugin from the **Cite** tab in Zotero's options found under the **Word Processors** drop-down menu.



When you install, be sure to tick off **Use classic Add Citation dialog** (See default view in iii. below.)




7. Using Zotero in Your Word Processor

- i. Once the plugin has been installed, there is a tab added which, when clicked, leads to various Zotero options:

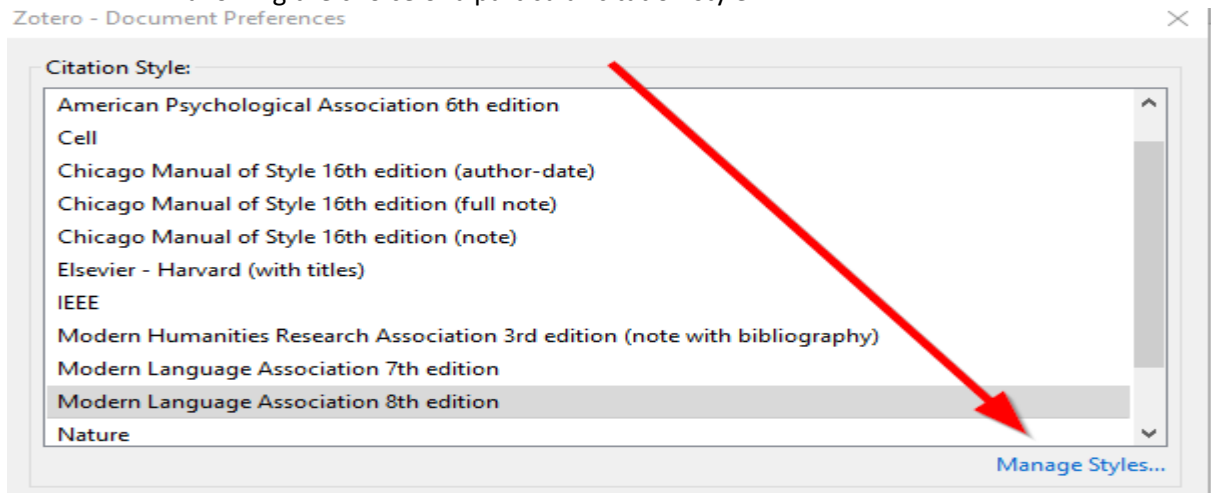


Note. In older versions of Word for Mac, a custom toolbar appears as a set of icons. The icons perform the following functions:

	Insert a citation
	Edit a citation
	Insert a bibliography
	Edit a bibliography

	Zotero refresh
	Document preferences
	Remove codes

- ii. Open an existing or new Word document **along with the desktop version of Zotero**. Place your cursor where you would like the reference to go and click on the “Add/Edit Citation” The first time you do this a **Document Preferences** dialog box will appear allowing the choice of a particular citation style.

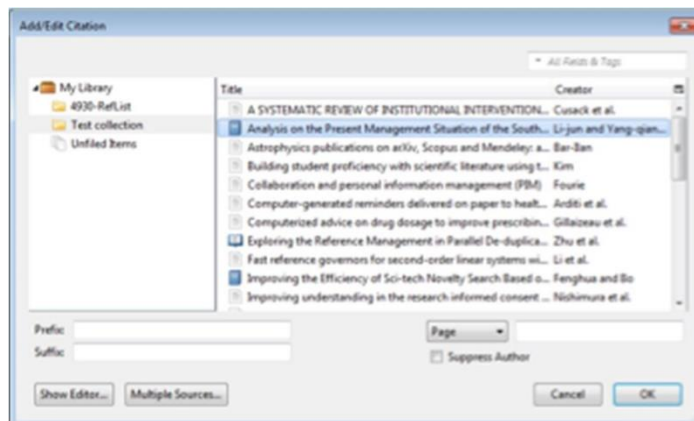


Zotero comes with the most common citation styles pre-installed, but If the style you want does not appear, click on the "Manage Styles" link, search for the style you need, and install it. Click OK.

Return to your document and you will see the following graphic unless you have made **Use classic Add Citation Dialog** the default as you were installing the Word plug-in (See 6 ii. above):



click on the inverted triangle and pick “Classic View.”



Click on OK to return to your document. An in-text citation will appear where the cursor was originally, formatted according to the citation style you selected.

- iii. When all the necessary citations have been inserted throughout the document, place your cursor at the position that the bibliography should appear. Then click on "Add/Edit Bibliography" to generate the bibliography. It should now appear in the correct format for the citation style you chose.

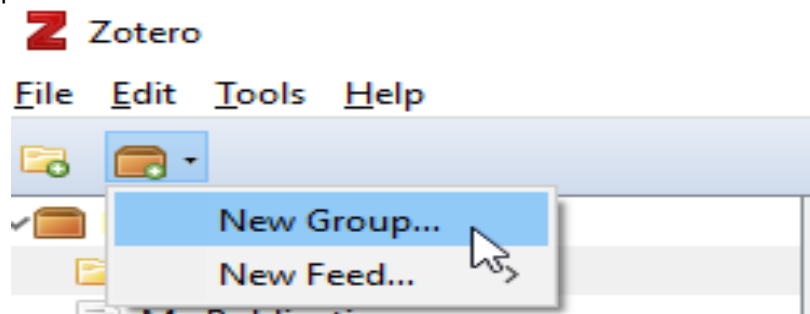
Sept. 2020

APPENDIX A: Working with a Group

Introduction: With groups, you can collaborate remotely with project members, set up web-based bibliographies for classes you teach, and so much more.

- **Share** your own work or sources you have discovered with others who are working in related areas.
- **Collaborate** with colleagues, publicly or privately, on ongoing research.
- **Discover** other people with similar interests and the sources they are citing

- i. Click the Brown folder near the top left of your Zotero window and then select New Group



- ii. Sign into your Zotero account on the web and then choose Groups. In Groups, you can search for an existing group

[People](#) · [Groups](#)

Found 2 results

Laurentian Law and Justice Department

[Group Library](#)

Members	3
Group Type	Public, Open Membership
Group Library	Anyone can view, only members can edit

- iii. OR... create a new group by choosing a Group Name and the Group Type

Create a New Group

[Browse All Groups](#) · [Search for Groups](#) · [Create a New Group](#)

Group Name

Choose a name for your group

Laurentian

Group URL: <https://www.zotero.org/groups/laurentian>

Group Type

Public, Open Membership

Anyone can view your group online and join the group instantly.

Choose a Public, Open Membership

Public, Closed Membership

Anyone can view your group online, but members must apply or be invited.

Choose Public, Closed Membership

Private Membership

Only members can view your group online and must be invited to join.

Choose Private Membership

Create Group

- iv. Once your Group has been set up, it will appear under your Groups tab. At that point, you can click Manage Members to invite others to join it

Laurentian

Group Library

[Manage Profile](#) · [Manage Members](#) · [Manage Library](#)

Members

1

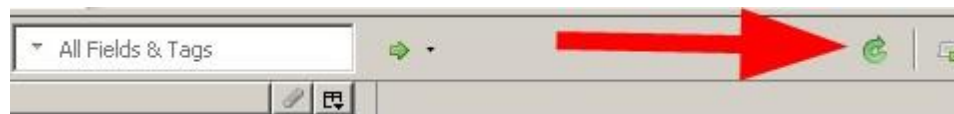
Group Type

Public, Open Membership

Group Library

Anyone can view, only members can edit

- v. To have your group appear in your list of collections, click on the Zotero icon and then click the sync button to have the group appear:



- vi. Finally, if you want to delete a group library you have created, you must do it from zotero.org. In the

As the owner of this group, you can delete it.

Delete Group

Zotero Group Settings page click