Using Zotero for Citation Management

USING ZOTERO FOR CITATION MANAGEMENT

A Step-by-Step Guide to Organizing and Citing Your Research

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A Step-by-Step Guide to Organizing and Citing Your Research

When it comes to research, few aspects are as demanding and time-consuming as the process of citing scholarly sources: After all, not only must a researcher worry about properly formatting their references, but they must also figure out a way to organize and keep track of their sources. Luckily, this painstaking task can be simplified by using Zotero, the free and open-source citation manager.

Compatible with various operating systems, Zotero allows you to download references into a personalized library and then create properly formatted in-text citations and bibliographies in Microsoft Word with just a few clicks of the mouse. Zotero also enables you to import full text PDFs into your library and to attach research notes to pertinent citations, creating a centralized hub for your research materials.

This guide will provide an overview of the essential features of Zotero, explaining in step-by-step detail how to download the program, create reference libraries, insert in-text citations into Word, and back-up your library into the cloud.

1.

Installing Zotero

Installing Zotero and using its connector tool with Firefox will provide you with the original, most reliable, and most stable version of the program. However, if you would prefer to use Chrome or Edge instead of Firefox, Zotero also supports connectors that will work with these browsers. Regardless of which browser you choose, the installation process consists of two steps: first, you must download the program itself, and then you should intall a compatible browser connector. While Zotero's functionality remains largely consistent across platforms, its appearance may vary slightly depending on the computer environment. Detailed instructions and accompanying screenshots for various installation options are provided below.
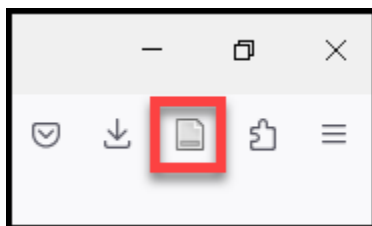
Installing Zotero for Firefox (PC Users)

If you are a PC user who uses Firefox to browse the internet, follow these steps to download Zotero and the Firefox connector:

1. Go to https://www.zotero.org/download/ and click **Download** underneath **Zotero 6 for Windows** (A).
2. You will be prompted to save an .exe file. Save this in a place you can easily access it, like your Desktop.
3. Locate where you saved the file, and double-click on it. The file should begin to extract, and you will be walked through the installation process.
4. Once Zotero has finished installing, return to https://www.zotero.org/download/. Choose **Install Firefox Connector** (B).
5. A pop-up box should appear, asking if you want to allow the installation. Choose **Allow**.
6. You will then be asked if you want to install Zotero Connector. Choose **Install**.

After installing, Firefox might ask to be restarted. If it does, close and reopen the program. Now, in the upper right-hand corner, you should see a white and gray rectangle, which represents the type of information Zotero sees that can be imported to its library (in this case, it sees a web page):

It is with this button that you will be able to capture references from the web and import them into your Zotero library.
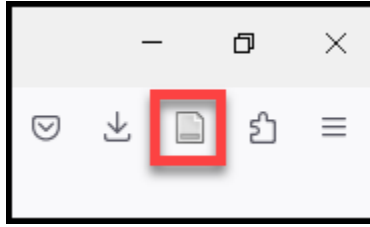
Installing Zotero for Firefox (Mac Users)

If you are a Mac user who browses the internet with Firefox, follow these steps to download Zotero and its connector:

1. Go to https://www.zotero.org/download/ and click **Download** underneath **Zotero 6 for Mac** (A).
2. You will be prompted to save an .dmg file. Save this in a place you can easily access it, like your Desktop.
3. Locate where you saved the file, and double-click on it. The file should begin to extract, and you will be walked through the installation process.
4. Once Zotero has finished installing, return to https://www.zotero.org/download/. Choose **Install Firefox Connector** (B).
5. A pop-up box should appear, asking if you want to allow the installation. Choose **Allow**.
6. You will then be asked if you want to install Zotero Connector. Choose **Install**.

After installing, Firefox might ask to be restarted. If it does, close and reopen the program. Now, in the upper right-hand corner, you should see a white and gray rectangle, which represents the type of information Zotero sees that can be imported to its library (in this case, it sees a web page):

It is with this button that you will be able to capture references from the web and import them into your Zotero library.

Alternative: Installing Zotero for a Different Browser

If you use a different browser other than Firefox, you can still use Zotero. The program will work with Chrome, Safari, and Edge.

1. Follow steps 1-4 outlined in the previous sections (depending on whether you are a PC or a Mac user).
2. Once Zotero has finished installing, return to https://www.zotero.org/download/. On the right, there should be an option to install a Zotero Connector for whatever browser you are using. For instance, this is what the page will look like if you are browsing the internet with Chrome:

If this does not happen automatically, choose **Zotero Connectors for other browsers**, found underneath the larger "Install Firefox Connector" link:
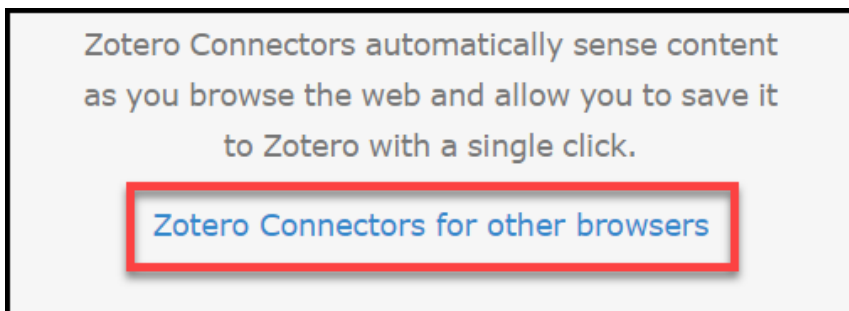

Depending on which browser you use, the instructions will be different. For all of them, however, you merely need to follow the installation instructions as specified on the screen.

Locating the Zotero Tools in Microsoft Word

When you install Zotero, it should automatically install an add-in in Microsoft Word

that allows you to insert in-text citations and bibliographies using the program. To locate this feature, go to the toolbar in Word and click on the **Zotero** tab:
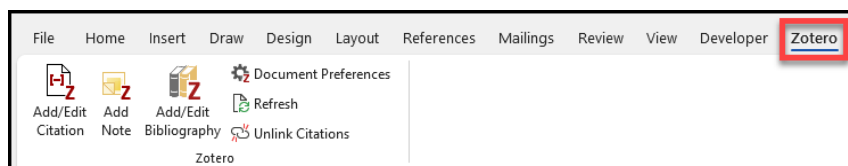
If, after installing Zotero, you don't see your Zotero tools in Word, try closing Word and restarting your computer. If, after a reboot, the tools are still missing, follow these steps:

1. Make sure the Word isn't running, either actively or in the background.
2. Go to Zotero.
3. If you are on a PC, click on **Edit → Preferences**. If you are on a Mac, go to **Zotero → Preferences**.
4. This will open the Zotero Preferences window. From here, click on the **Cite** tab (A) then click on the **Word Processors** sub-tab (B).
5. From here click either **Install Microsoft Word Add-in** *or* **Reinstall Microsoft Word Add-in** (C).
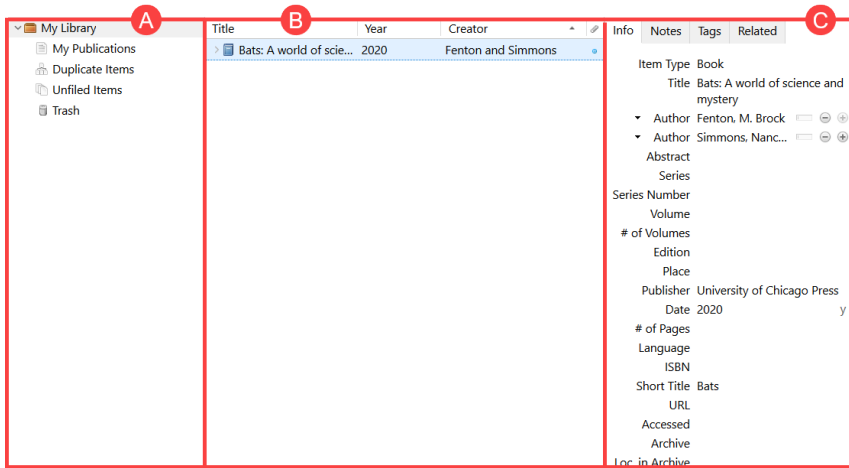6. Reopen Word and check for the tools.
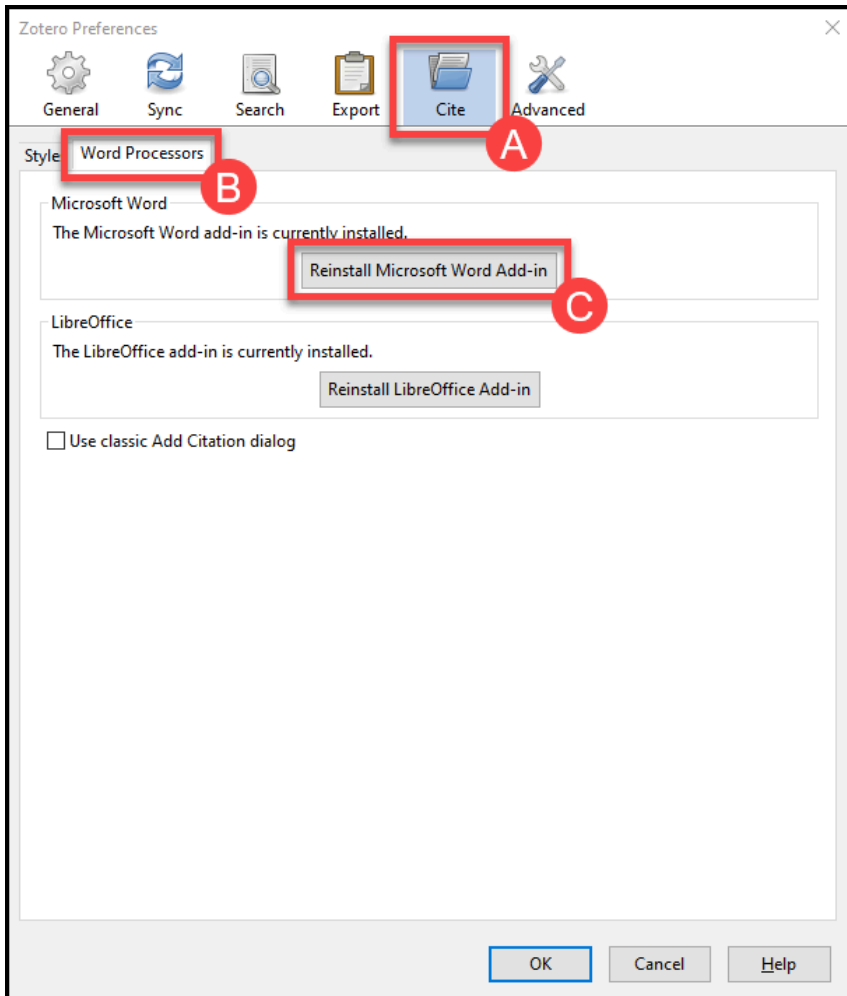
2.

The Zotero Library

Once installed, Zotero can be opened by navigating to where you have installed the program and double-clicking on its icon. This will open the Zotero window:
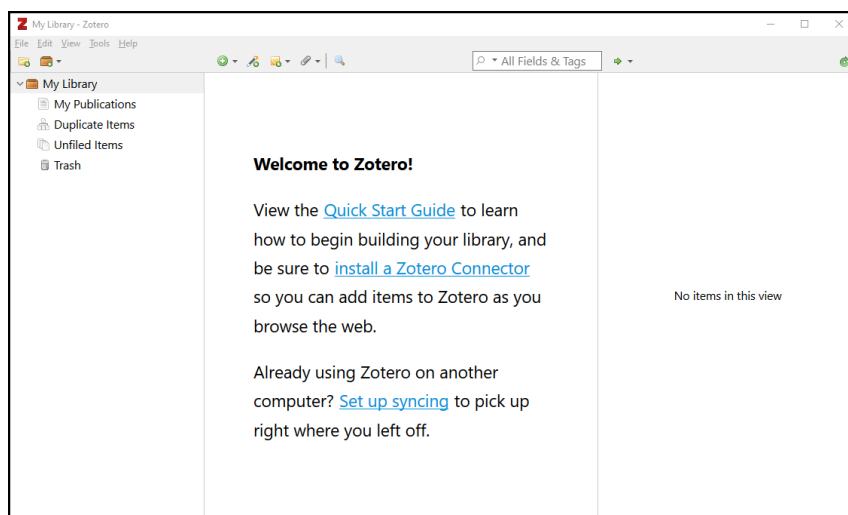
The library has three main panels, which are labeled below:

A. The left panel allows you to navigate your library's folder system. It is from this panel that you can build reference collections or create group libraries to share with others.

B. The middle panel provides a list of the references contained in the library or selected collection. Each reference will be listed horizontally.

C. The right panel lists the bibliographic metadata (e.g., author, title) associated with each reference.

The Zotero Toolbar

The Zotero toolbar is situated at the top of the Zotero window:

The various toolbar functions are as follows:
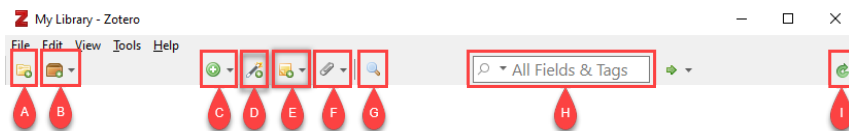
A. **New Collection:** This button allows Zotero users to create folders, or "Collections," in their Zotero library. Collections enable users to easily organize and group related references into distinct subgroups.

B. **New Library:** This button allows Zotero users to create multiple group libraries, each of which is separate from the user's main library. Group libraries can also be shared with other Zotero users.

C. **New Item:** This button allows a user to manually add a new reference to their Zotero library.

D. **Add Item by Identifier:** This button enables users to quickly add references to their library by entering in a key numerical identifier (e.g., ISBN, DOI).

E. **New Note:** This button allows users to create "notes." Notes can be associated with specific Zotero entries, and they allow users to record additional textual information about those entries.

F. **Add Attachment:** This button allows users to add files (such as PDFs) to their Zotero library. Attachments, like notes, can then be associated with individual Zotero entries.

G. **Advanced Search:** This button allows the user to perform an advanced search of their library.

H. **Search Bar:** This button allows the user to search their library for keywords and tags.

I. **Zotero Server Sync:** This button will synchronize the user's desktop library with their cloud-based library. This feature will only work if a user has created and has logged into a Zotero account.

Accessing the Zotero Preferences Panel

Sometimes it is necessary to "get underneath the hood" of Zotero (so to speak) and adjust the program's default settings. You can do this through the **Preferences** panel. To access this panel, go to **Edit → Preferences** (PC) or **Zotero → Preferences** (Mac):
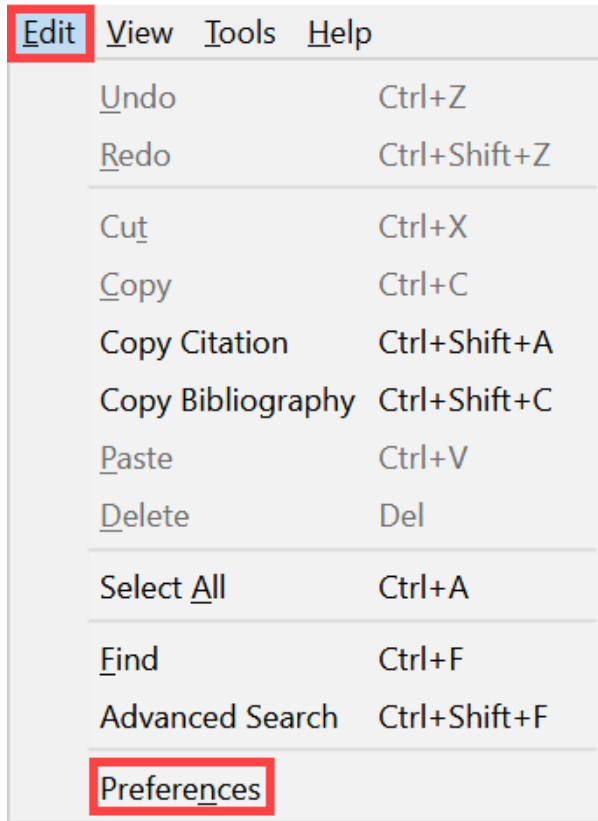
As mentioned earlier, the **Preferences** panel allows you to update the program's various settings. Two settings that you might want to adjust are the following:

- To ensure that Zotero will automatically capture available PDFs and snapshots of webpages when importing references, go to the "General" tab and ensure that boxes reading "**Automatically take snapshots when creating items from web pages**" *and* "**Automatically attach associated PDFs and other files when saving items**" are checked (A). If they are not, go ahead and enable them.
- If you would like to work with tags and create your own tags, Zotero's automatic importing of keywords from citations may really clutter your workspace. You can turn this feature off in advance by going to the "General" tab and unchecking the box labeled "**Automatically tag items with**

keywords and subject headings" (B).

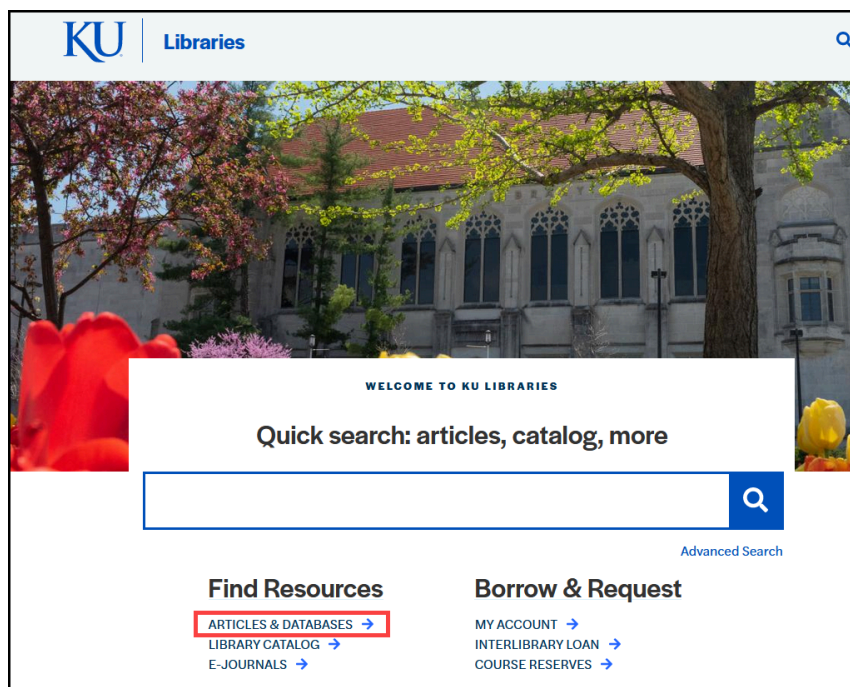Once you have adjusted the settings to your liking, click **OK**.

3.

Building and Organizing the Zotero Library

To start building your library after installing Zotero, begin by browsing the internet or the KU Library catalogue for items of interest. When you find a citation that you would like to download, simply click on the Zotero connector button. The reference will then be downloaded into your library.

Capturing Citations using the Zotero Connector

Zotero is capable of capturing citations from websites, library databases, and many other sources, and in this section, we will use the Google Scholar database to demonstrate how this process works.

1. First, go to the KU Libraries home page (https://lib.ku.edu) and choose the option that reads **Articles & Databases** underneath the Quick Search bar:
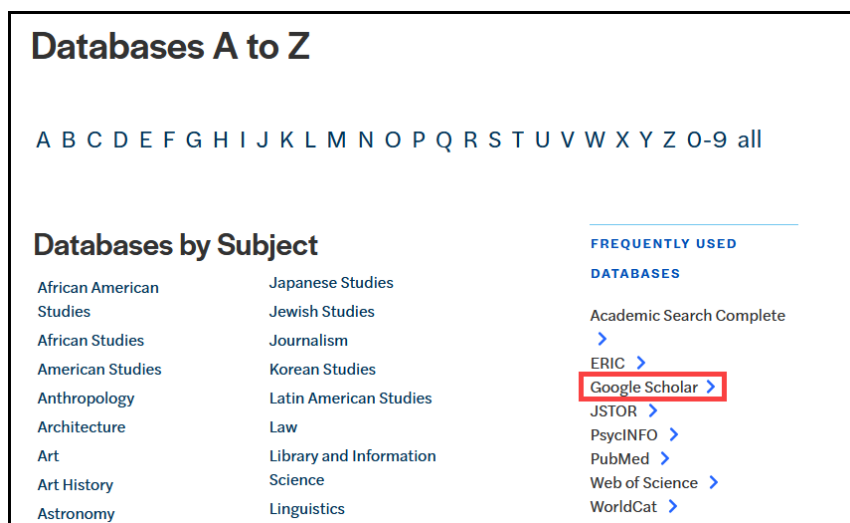
2. This will redirect you to a listing of all the databases that KU has access to. Scroll down to the **Frequently Used Databases** section and click **Google Scholar**:

3. Once redirected to Google Scholar, perform your search. You will then be presented with a listing of citations.

At this point, you have two options: You can capture multiple citations or you can capture them one at a time. Either way, the tool that allows you to easily download citations is the Zotero Connector that we installed earlier, which is located in the upper-right hand corner of the browser window.

Capturing Multiple Sources Simultaneously

To capture multiple references at the same time using the connector button, follow these steps:

1. Perform your search. Then, in the upper left corner of your browser, click on the **Zotero connector button** (A). Note that if the button appears as a yellow folder, this means that Zotero has detected multiple sources that it can capture.
2. After clicking the connector button, the **Zotero Item Selector** window will open. This window will list the citations from the Google Scholar search in the order they appear on the screen.
3. Check the tick boxes next to the references you want to capture (B).
4. Click **OK** (C). The selected references will then be added to your Zotero library.
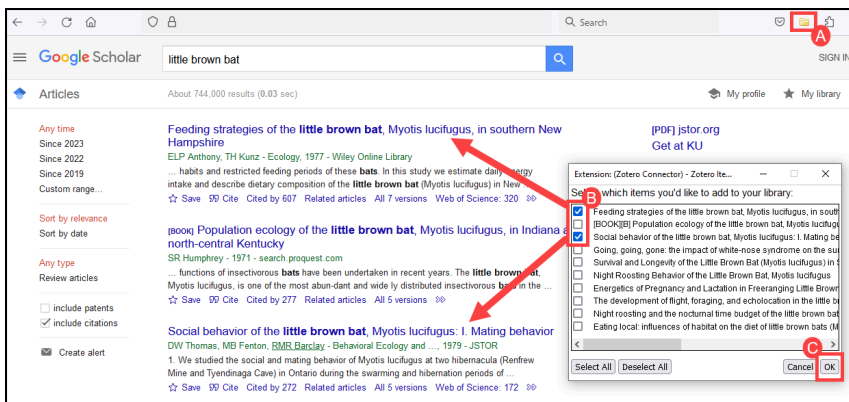
Capturing Sources Individually

To capture references individually using the connector button, follow these steps:

1. Perform your search. Then, click on the hyperlink leading to the reference you want to capture.
2. Once on the appropriate page, click on the **Zotero connector button** in the upper left corner of your browser
3. Since you are dealing with a single source, Zotero will not ask you which reference to capture. Instead, it will simply capture whatever reference is "right in front of it," so to speak.

Note that when there is only one reference on a page, the icon for the connector button will change depending on what type of reference you are trying to capture. The icons that Zotero uses are as follows:
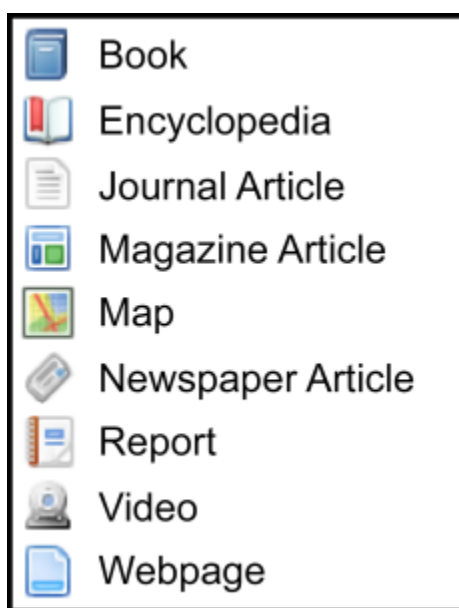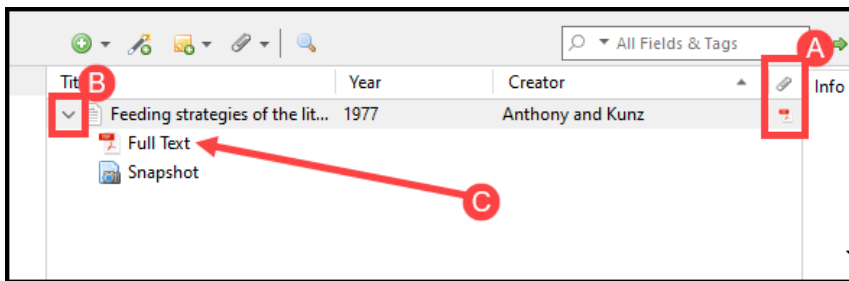

Automatically Downloading PDFs

When capturing references using the connector tool, Zotero will often attempt to

automatically download full-text PDFs and add them to your Zotero library as attachments. (For the best chance of bringing in a PDF, navigate all the way to the page that contains the "Download PDF" link.)

After capturing a reference, you can check to see if Zotero downloaded any associated PDFs by first locating the reference in question within the library. If the item has a small PDF icon in the paper clip column (A), that means the PDF is already attached to the item. You can view this PDF by clicking on the expansion triangle to the left of the citation title (B); this will list all attachments associated with the citation, of which one should be the PDF (C).

If Zotero is struggling to automatically download PDFs, you may need to adjust the Zotero Capture Tool's proxy settings. To do this:

1. In your browser, right-click on the Zotero Connector button and choose **Preferences** (if using Firefox) or **Options** (if using Chrome). This will open the Connector settings window. On the left, click on **Proxies** (A).
2. Under the Configured Proxies, click the + button (B).
3. In the **Login URL Scheme** box (C), type: https://www2.lib.ku.edu/login?URL=
4. In the **Proxied URL Scheme** box (C), type: %h.www2.lib.ku.edu/%p
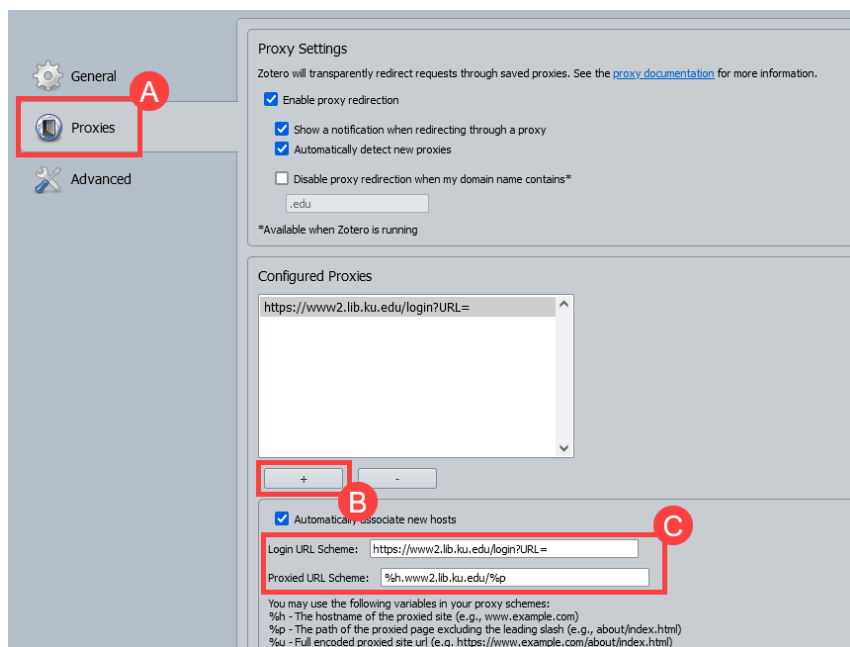
Even after adjust these settings, there will be times that Zotero is not be able to download PDFs automatically for you. If this happens, you might need to download the PDF yourself and attach it to a Zotero entry by hand. To do this:

1. Download the article from online and save it to your computer.
2. Go to your Zotero library. From the middle panel, select the citation you wish to attach the PDF to.
3. **Right-click** (PC) or **control+click** (Mac) on the citation. From the list of choices, choose **Add Attachment → Attach Stored Copy of File**.
4. Next, navigate to where you saved the PDF and attach it as you would attach a file to an e-mail.

Adding an Item by Identifier

As was discussed in the previous section, Zotero has a handy "Add Items by Identifier" tool that allows you to quickly add references to their library by entering in key numerical identifiers. Supported identifiers include International Standard

Book Numbers (ISBNs), Digital Object Identifiers (DOIs), PubMed ID (PMIDs), arXIV IDs, and Astrophysics Data System (ADS) Bibcodes. To use this feature:

1. Determine the unique identifier associated with the reference you are wanting to import into your library (e.g., its ISBN, DOI, PMID).
2. Once you have located the identifier, click on the **Add Item by Identifier** icon (A)
3. Enter or copy-and-paste the identifier into the text box provided (B) and hit **Enter**.
4. The item should now appear in your library (C):
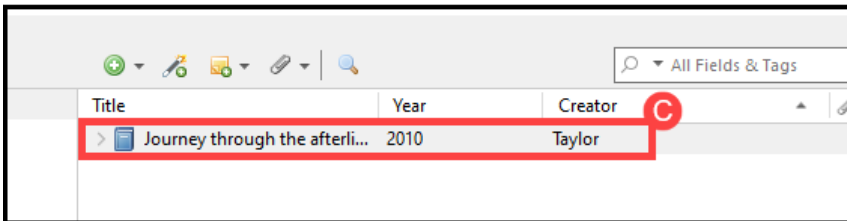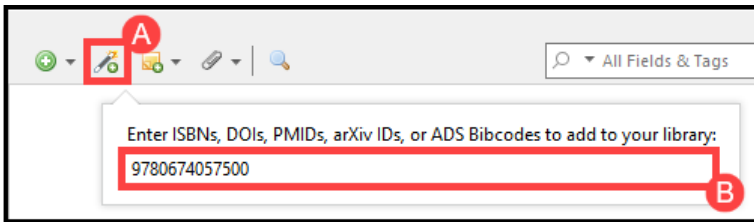
Adding a Reference Manually

What if you need to include an item in your library for which online citation information is unavailable (e.g., an unpublished manuscript, an interview transcript, a survey instrument, or a unique data set)? Never fear, for you can always manually add a reference to your Zotero library. To do this:

1. Click the **New Item button** (A) from the Zotero toolbar.
2. Select the type of reference you want to add (e.g., book, journal article, newspaper) (B). If you do not see the reference type you need, click **More** (C) for a complete list.
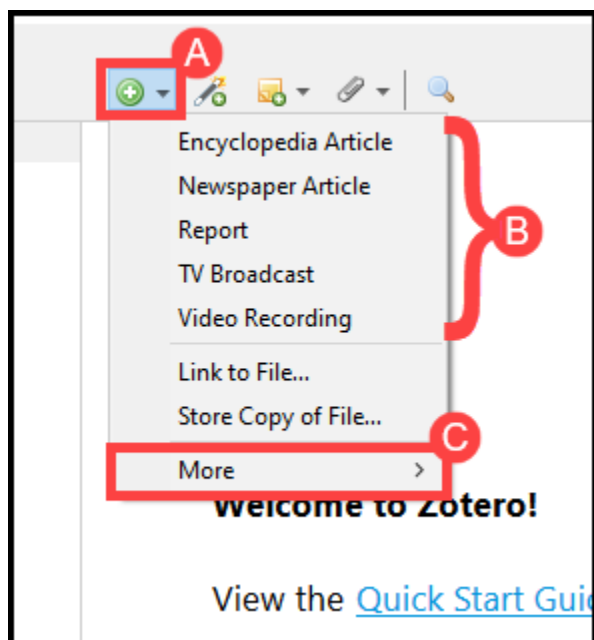
3. Zotero will add a blank reference template to your library (D). Click on this blank reference and open up the **Info** tab (E) on the right.
4. In the slots provided, add the required metadata (F). Note that this information will vary depending on the type of reference you are working with.
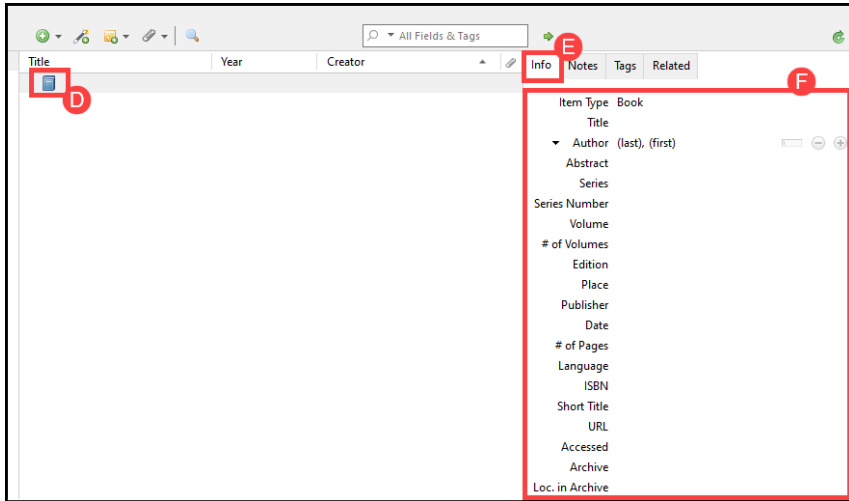
## Building a Library from Previously-Downloaded PDFs

You can also import a single PDF or a group of PDFs into your library, and, if the program can read them, it will convert them into Zotero entries. This does not work for every single PDF you might want to add to your library, but it can still save you some time if you plan on working with a considerable number of PDFs. To build a library from previously-downloaded PDFs:

1. From the file explorer, go to the folder where your PDFs are stored.
2. **Select the PDFs** you want to add to your library (A).
3. **Drag-and-drop** the files into the middle panel of your Zotero library (B).

Important: Be careful not to drop the files on top of an entry that is already in your library (doing so will associate the PDFs with that entry, turning them into attachments). Instead, drag the files and drop them only when a thin line appears *between* library entries (C).
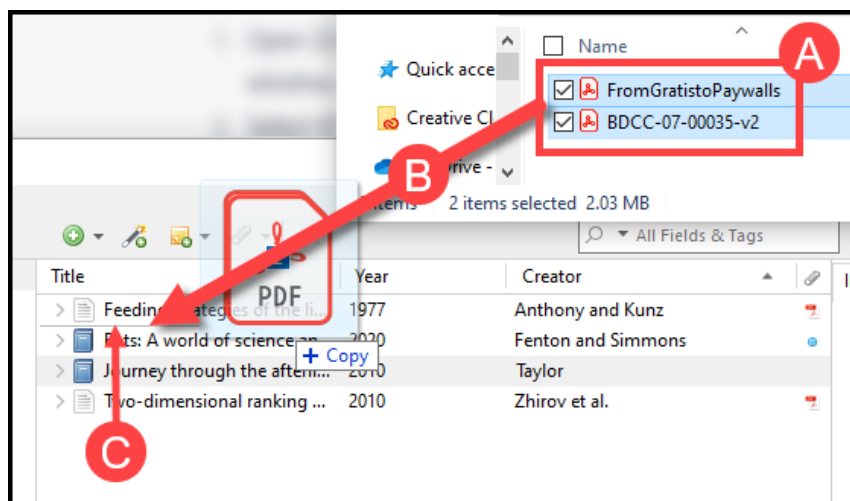
After a beat, the **PDF Metadata Retrieval** window will open. This window lets you know if Zotero was able to successfully convert a PDF into a Zotero entry (indicated by a green check mark) or if it was not able to convert the PDF (indicated by a red x).
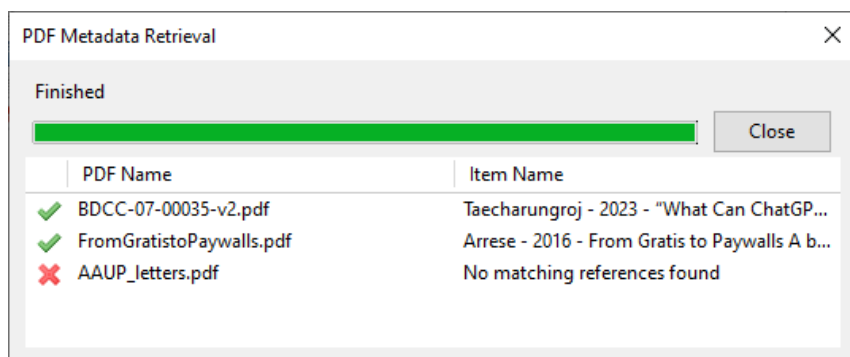
If Zotero is unable to retrieve the metadata for a PDF, it will simply drop the file into your library as-is. Luckily, you can manually convert this PDF into a Zotero entry by **right-clicking** (PC) or **control-clicking** (Mac) on it and choosing the **Create Parent Item** option. This will then attach the PDF to a blank reference template that you can fill out by hand.

Sorting References

You can control which citational attributes the middle panel displays by **right-clicking** (PC) or **control-clicking** (Mac) on any of the column headers (A) and choosing the appropriate fields (B):
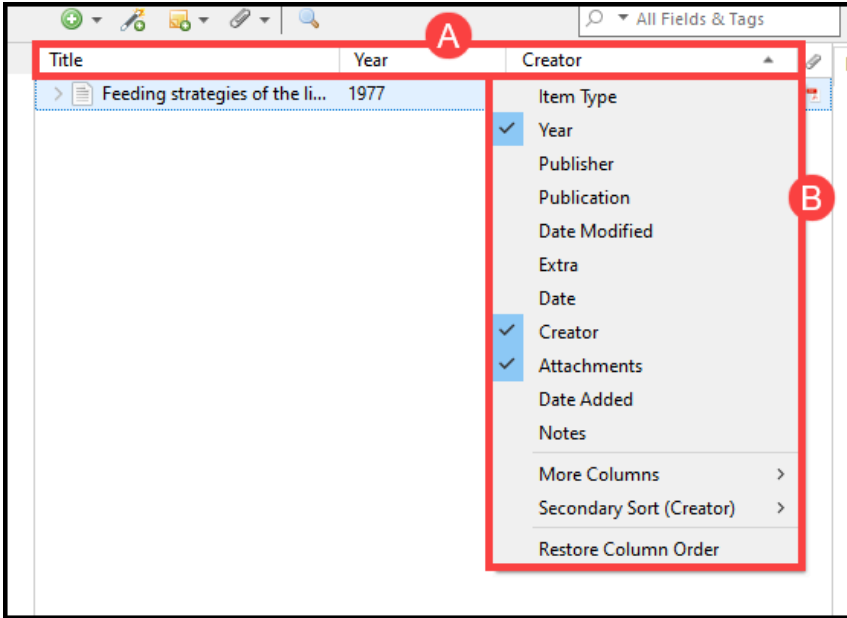
Clicking on the column headers individually will either alphabetically or numerically sort the references in your library, based on which header you selected (for instance, clicking on "Title" will list all of the references in your library alphabetically by title, whereas clicking "Year" will list the references by the year they were published).

Creating Collections

In Zotero, you can create unique folders, called "Collections," to divide your larger library into smaller subdivisions, thereby making it easier to locate pertinent references. To create a collection:
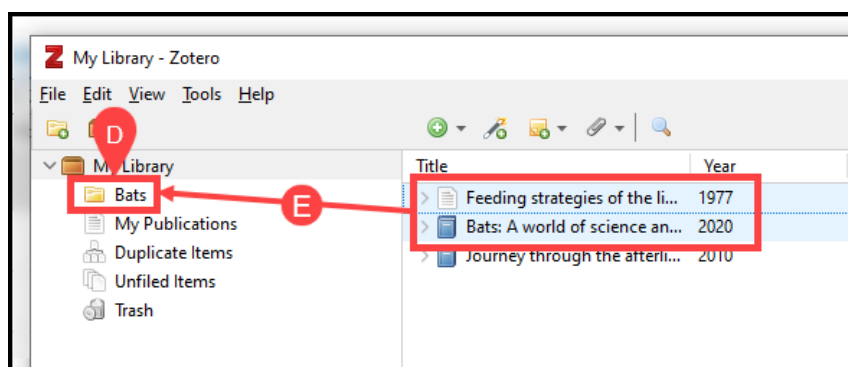
1.   Click on the **New Collection** file folder icon (A) in the upper left corner of

the Zotero library.

2. In the **New Collection** pop-up box (B), enter a name for the new folder and click **OK** (C).
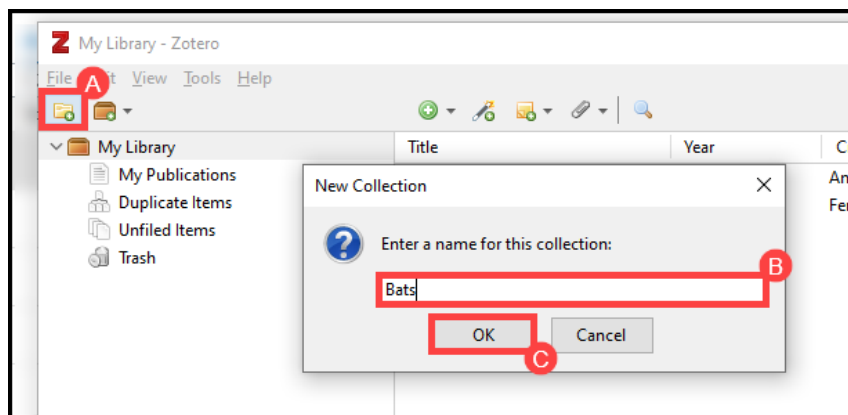
3. The new folder will appear in the left panel of your Zotero library (D). From the middle panel of your main library, you can **drag-and-drop** selected references into the new collection (E).


Note: When you drag-and-drop a reference from your main library into different collections, Zotero does *not* duplicate that entry; it is instead cross-lists the reference in different locations.

Working with Tags

Zotero allows you to assign keyword tags to references, enabling you to quickly access all associated references in your library with just the click of a mouse. To set up a tagging system:

1. Select a reference you would like to tag from the middle panel (A).
2. In the right-hand panel, choose the **Tags** tab (B). Then click **Add** (C).
3. Type in a name for your tag in the blank space provided (D). (If the tag is already in the system, it will pop up as you type.)
4. If you need to remove a tag from an item, click the **minus** icon on the right-hand side of the tag listing (E).
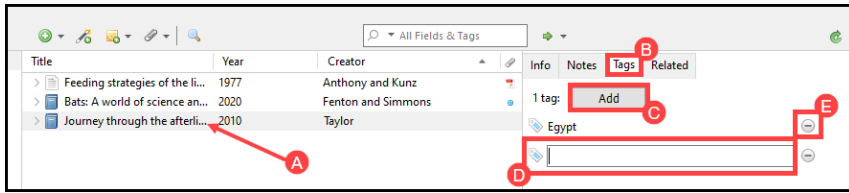

You can see which tags are active in your Zotero library by looking at the tag cloud located at the bottom of the left-hand panel:
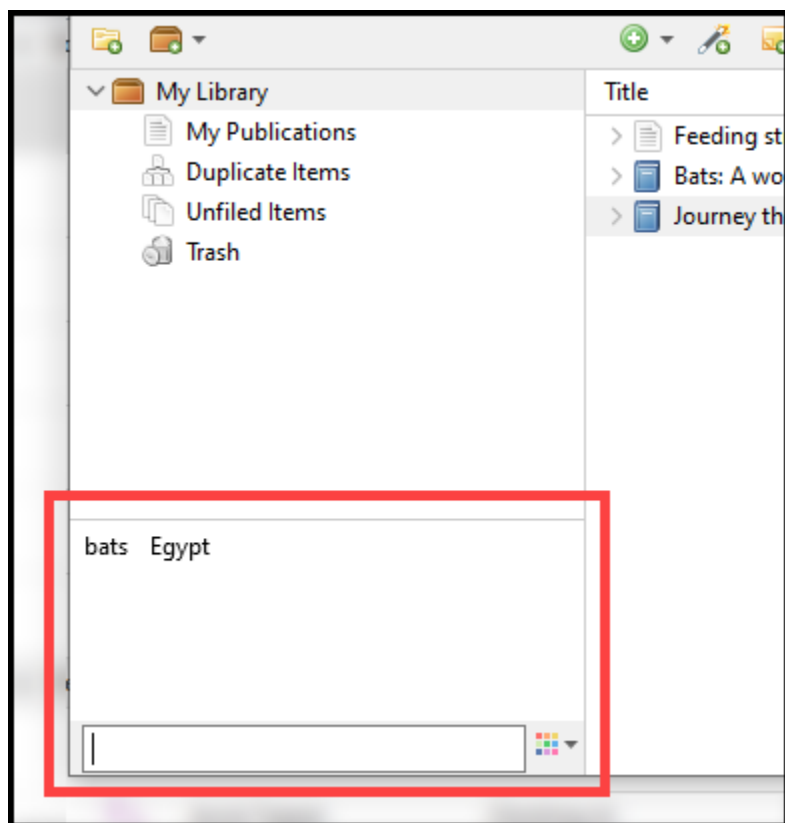
Note: If the tag cloud is not opened by default, locate the small dotted line surrounded by upward-pointing arrows located at the bottom of the panel. Click on this line and the tag cloud will open.

From the tag cloud, you can click on any of the keywords and Zotero will show you all the references in your library that contain that tag (to revert back to a listing of all tags, simply click on the chosen keyword once more to de-select it). For example, consider the following example: A user has selected the "bats" tag from their library's tag cloud (A). This has resulted in Zotero listing only those entries in their library that have been marked with the "bats" tag (B):
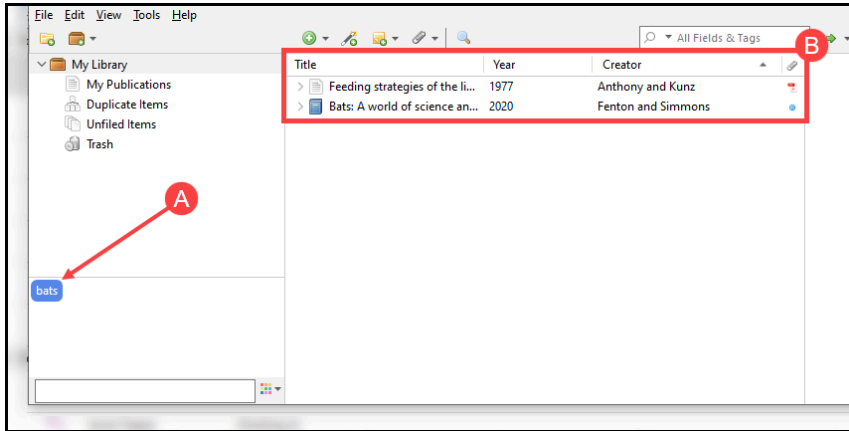
You can also color-code your tags to make organization even easier! To do this:

1. **Right-click** (PC) *or* **control-click** (Mac) on a tag in the cloud and select **Assign Color...** (A).
2. Chose a color from the **Color** box (B).
3. Click **Set Color** (C) to save your color preferences.

You will now see a small colored square (D) next to all the citations that have been tagged with the pertinent keyword:
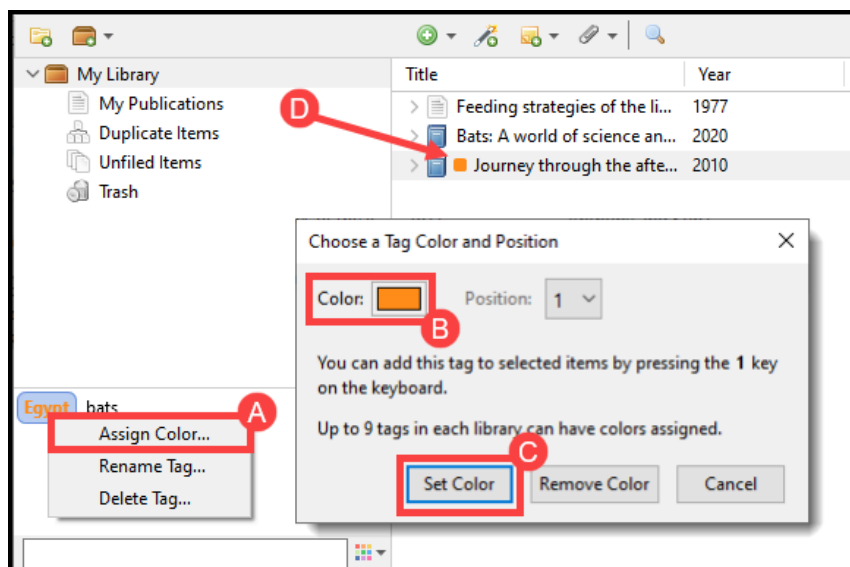
Once a color has been assigned to a tag, you can also assign a "position" to that tag by re-opening the **Assign Color** box and selecting a number from the **Position** box. Assigning a position enables you to click on a reference from the middle panel and then key in the appropriate number; this will automatically add the corresponding tag to the reference in question.

Finally, to delete a tag from the tag cloud, **right-click** (PC) or **control-click** (Mac) on it and choose **Delete Tag…**

Managing Duplicate References

Sometimes, in the course of amassing sources, you will discover that you have duplicate copies of a reference in your library. Of course, you can go through your library and weed these out by hand, but luckily, Zotero has a "merge" function that makes removing duplicates substantially easier. To use this tool:

1. Click the **Duplicate Items** (A) link under the **My Library** folder in your Zotero library. Zotero will then list all the entries in your library that are duplicates of one another in the middle panel.
2. Select a reference that you would like to merge; Zotero will then grab all

duplicates of that reference (B).

3. In the right panel, you will see a drop-down box that lets you toggle between the duplicate entries (C). From here, choose which version you wish to serve as the "master item". This will be the library entry that Zotero keeps after discarding any duplicates.

4. Click **Merge (#) items** at the top of the right panel (D). Zotero will then collapse down the duplicates into a single library entry.

5. Repeat this process for any other duplicate entries in your library.
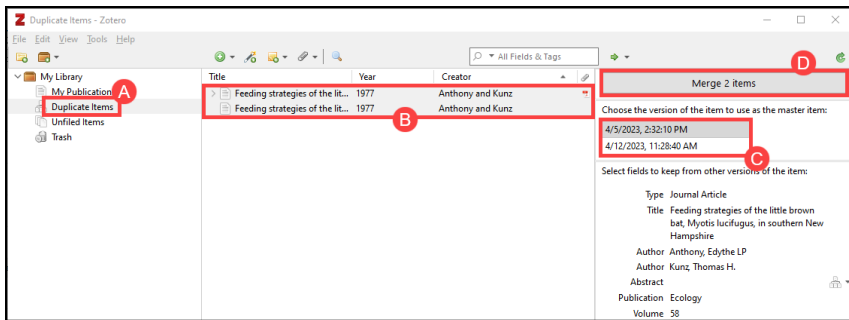
4.

Using Zotero with Microsoft Word

In addition to using Zotero as an organizational tool, you can also use the program to generate in-text citations and bibliographic entries in a variety of word processors. In this section, we will focus on using Zotero with Microsoft Word.

To have the two programs work together, first, make sure that you have Zotero running in the background. Then, open Word. From the program toolbar, click the **Zotero** tab. (If you do not see the Zotero tab, please read through the section entitled "Locating the Zotero Tools in Microsoft Word" from chapter 1):
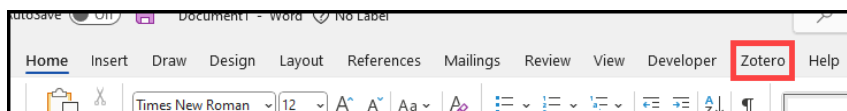
After clicking this tab, you will see the following options displayed in the Word ribbon:
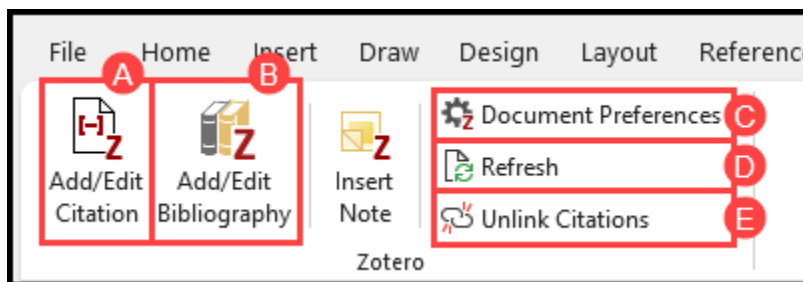
A. **Add/Edit Citation:** This button allows you to insert or modify a citation at the current cursor position.
B. **Add/Edit Bibliography:** This button allows you to insert or modify a bibliography at the current cursor position.
C. **Document Preferences:** This button enables you to set your citation style

(e.g., APA, MLA, Chicago).

D. **Refresh:** This button refreshes the document; if you have edited the contents of a citation in Zotero, the "Refresh" button will ensure that the document reflects those changes.

E. **Unlink Citations:** This button will sever the connection between Word and Zotero. This will convert your citations to plain text, preventing you from either automatically updating them with the "Refresh" button or converting them to a different style with the "Document Preferences" button.

Choosing a Citation Style

Before generating in-text citations and bibliographies, you will need to tell Word which citation style you want to work with. To do this, click **Document Preferences**, select the style you would like to use from the **Citation Style** list, and then click **OK**:
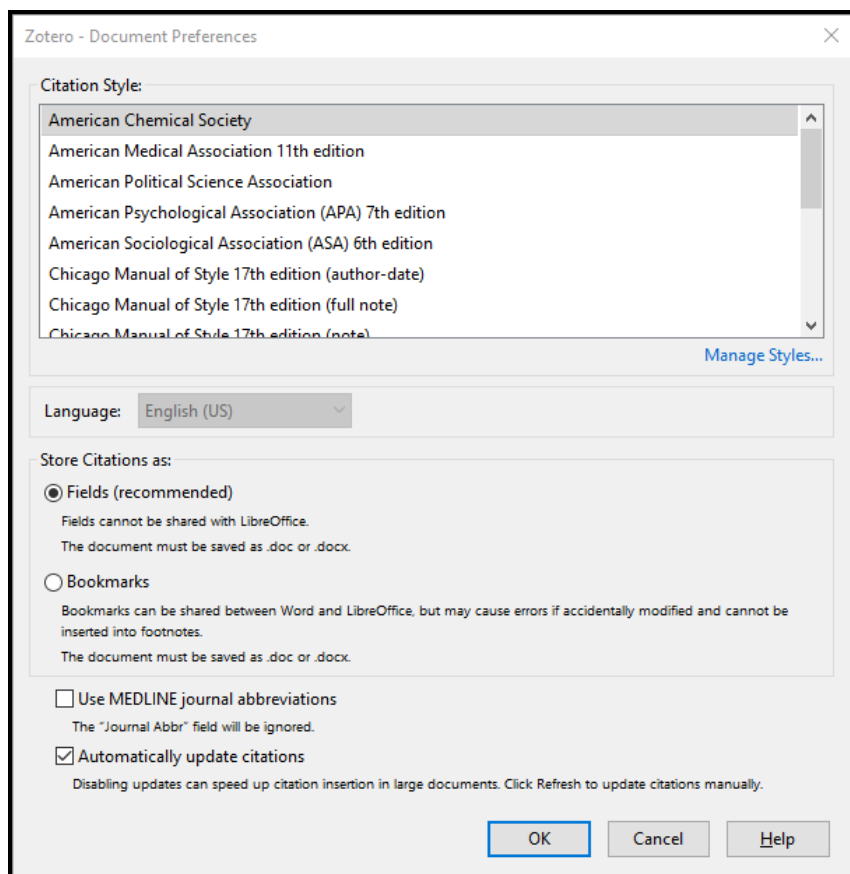
Zotero comes preloaded with the most commonly used citation styles (e.g., APA, MLA, Chicago), but what if the style you need is not on the list? Luckily, Zotero allows you to load additional styles manually. To do this:

1. Open Zotero and go to **Edit → Preferences** (PC) *or* **Zotero → Preferences** (Mac).
2. From the Zotero Preferences window, select the **Cite** tab (A). From this tab, click the link below the "Style Manager" box that says **Get Additional Styles** (B).
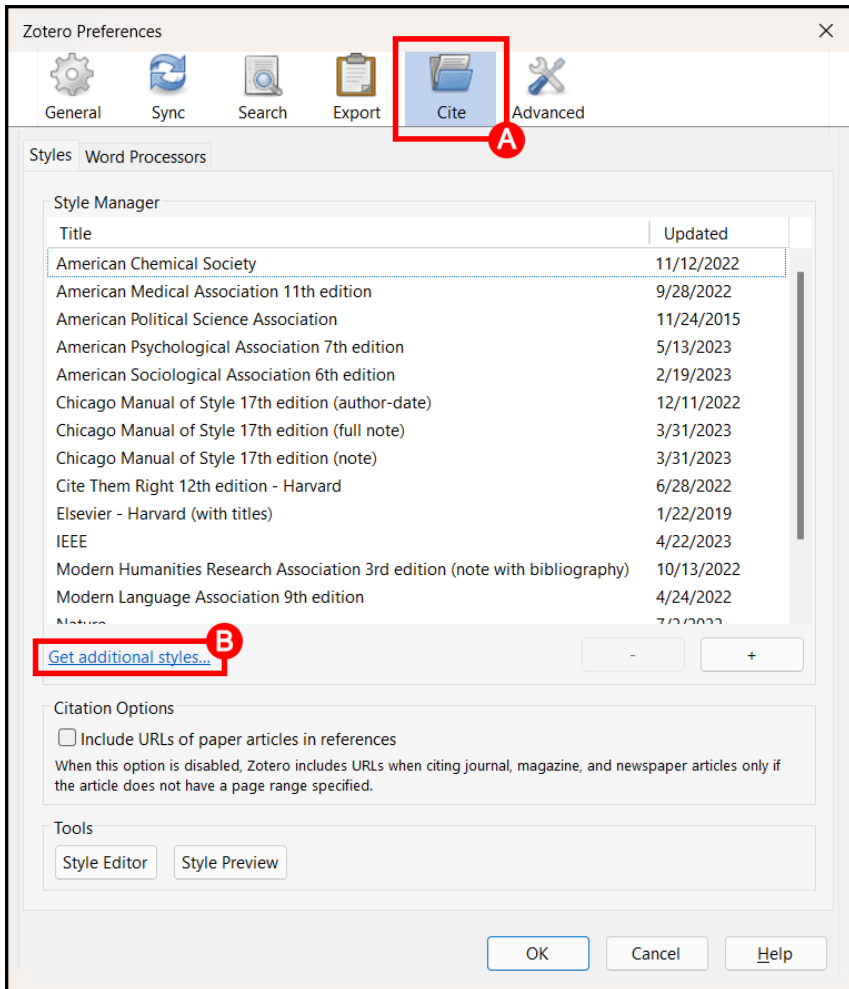
3. This will open the **Zotero Styles Repository**, which lists over citation 10,000 styles that you can use. To find a style, search for it by name (C); you can also toggle the results by format style or by academic field (D).

4. When you have found the style you want, click on it from the list provided (E) to add it to your Style Manager.
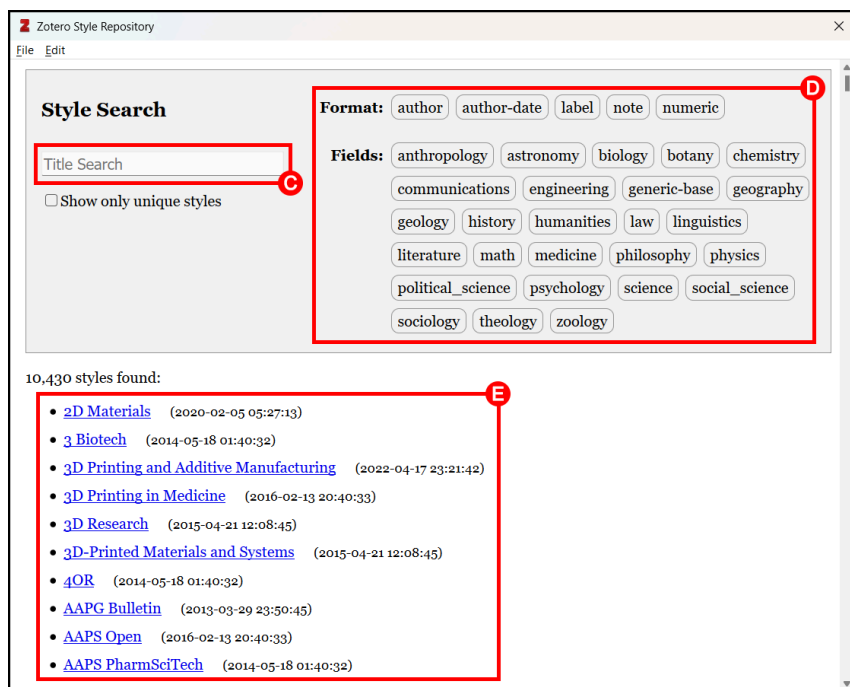
5. Next, return to the Zotero Preferences window. The style you selected will now be included in the "Style Manager" list (F). Click **OK** (G).
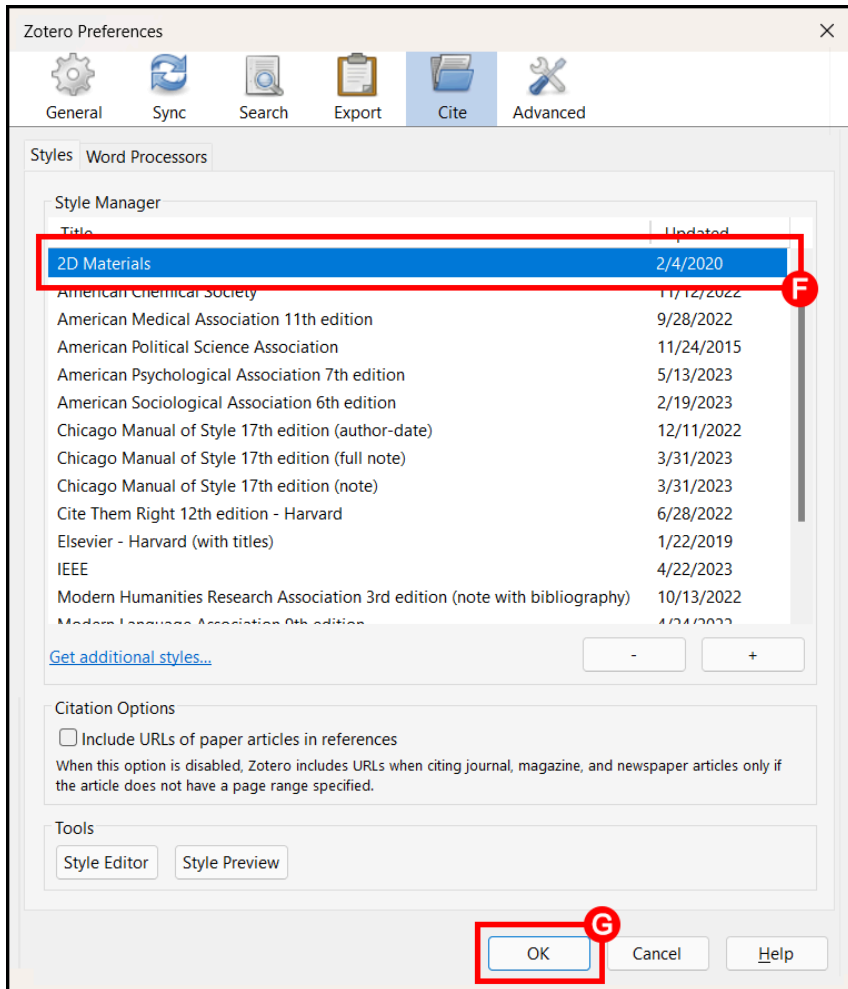
6. Finally, go to Word and click **Document Preferences.** From the **Citation Style** list, select the newly-added citation style and then click **OK**.

Generating In-Text Citations

Now that our citation style has been selected, we can use Zotero to generate in-text citations in our Word document. To do this, make sure that Zotero is running in the background, then:

1. Place the cursor at the location where you want the citation to appear (A). Note that Zotero will generate the citation at the location of the cursor, so it is important to ensure that the cursor is in the right place!

2. From the Zotero toolbar, click the **Add/Edit Citation** button (B).

3. A small red box will appear. In the slot provided, begin typing a title, an author name, or a year (C). Zotero will present you with a drop-down list of potential matches. If you see the citation you want, click on it (D):
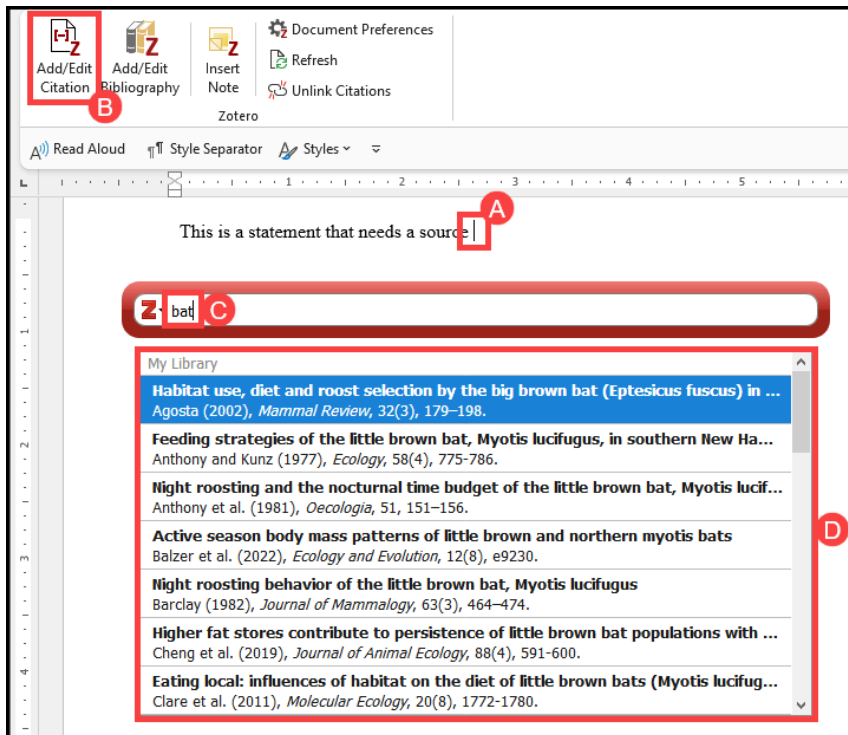
4. The citation will now be listed in the red box. If you need to adjust how the citation appears (e.g., if you need to add a page number or suppress the author's name), click on the citation (E) and use the **Prefix**, **Suffix**, **Page** and **Suppress Author** functions to tweak the citation to fit your needs (F).
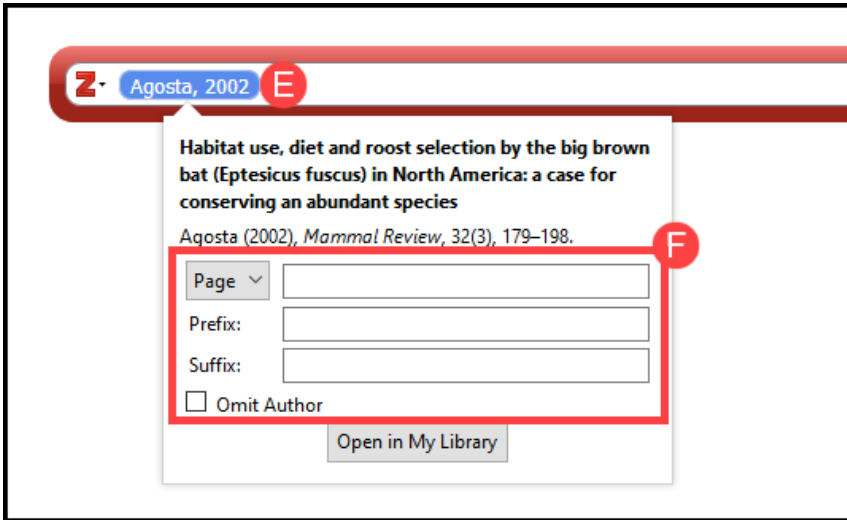
5. To add another citation immediately after the first, simply type another keyword, name, date, etc. and select the appropriate citation from the drop-down list.


6. When finished, hit the **Enter** key on your keyboard. The in-text citation will appear automatically in your document. Zotero will also hold the citation in memory to include in your bibliography later.

Editing In-Text Citations

If you need to make changes to a citation that has already been inserted into your document:

1. Click on that citation (A) and then choose the **Add/Edit Citation** (B) option from the Zotero toolbar.
2. The red box will reappear, containing the citation in question. Click on the citation (C) and make any necessary changes in the box provided (D).
3. Hit the **Enter** key. The in-text citation will then automatically be updated.
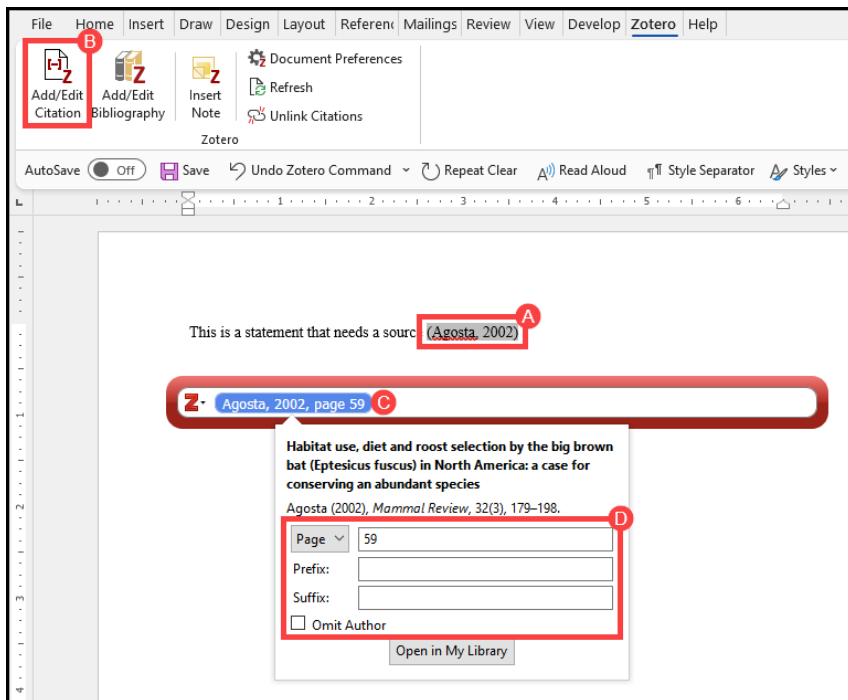
If you need to change the content of the citation itself (e.g., correcting a typo, adding/removing an author's name, updating the year of publication), you will have to make this change in Zotero itself. To do this:
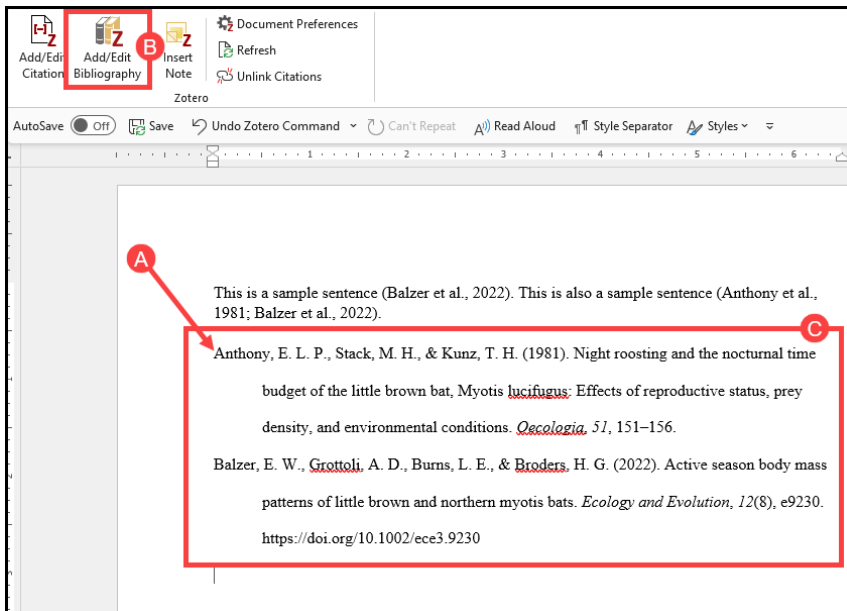
1. Return to your Zotero library and locate the citation that needs to be updated.

2. Adjust the citation's metadata. Then, click away from the citation to save any changes.
3. Return to Word, and from the Zotero toolbar, click the **Refresh** button. The update should be pushed through.

Inserting a Bibliography

When you are finished adding in-text citations to your document, the next steps is to generate a bibliography that lists all of the sources that you have used. To add a bibliography to your document:

1. Place your cursor at the location in the text where you would like your bibliography to be generated (A).
2. Then, from the Zotero tab, click on the **Add/Edit Bibliography** button (B).
3. Zotero will then generate a bibliography (C), listing all the citations that you have used in your document.

Note that this bibliography is dynamic, which means that whenever you *remove*

a Zotero-generated in-text citation from your document, the bibliography will automatically update to reflect that removal; likewise, if you *add* new Zotero-generated in-text citations to your document, the bibliography will automatically update to reflect that addition.

If you need to change aspects of the bibliography itself (e.g., correcting a typo, adding/removing an author's name, updating the year of publication), you will have to make this change in Zotero itself. To do this:

1. Return to your Zotero library and locate the citation that needs to be updated.
2. Adjust the citation's metadata. Then, click away from the citation to save any changes.
3. Return to Word, and from the Zotero toolbar, click the **Refresh** button. The bibliography should now reflect the changes you made.

Switching from One Citation Style to Another

Sometimes you might find yourself needing to convert all the citations in your document from one style to another. Luckily, Zotero can do this very easily: In the Word menu, go to the Zotero tab and choose the **Document Preferences** button. A window will appear listing various citation styles. From the list provided, select your desired citation style and then click **OK**. Zotero will automatically update the citations in your document to reflect your newly-chosen style.

Finishing Up

To create a final copy of your document, you will need to remove Zotero field codes—essentially, you will need to "unplug" Zotero from your Word file. Removing field codes will return your document to plain-text, which means that you will be able to edit any citations as if they normal text. The downside is that you will lose Zotero's ability to automatically update/format those citations. A good plan, then, is to save a copy of your document with the Zotero field codes in place first, that way if you need to go back and make major changes, you will still have a "plugged in" version. To remove field codes to create your plain text, final document:

1. First, save your "plugged in" version as a backup.
2. Next, go to the Zotero toolbar and click the **Remove Codes** icon.
3. A warning box will appear. Click **OK**.
4. **Important:** Immediately save the new version with a new name. This will ensure that you have two copies of the file: one with the Zotero formatting and one without.

Using Zotero with Google Docs

If you don't want to use Microsoft Word when writing up your research, you can also use Zotero with Google Docs. When you install the Zotero Connector, a Zotero tab will automatically be added to your Google Docs menu, and while the interface is a bit different from Word, the Zotero tools work the exact same way.
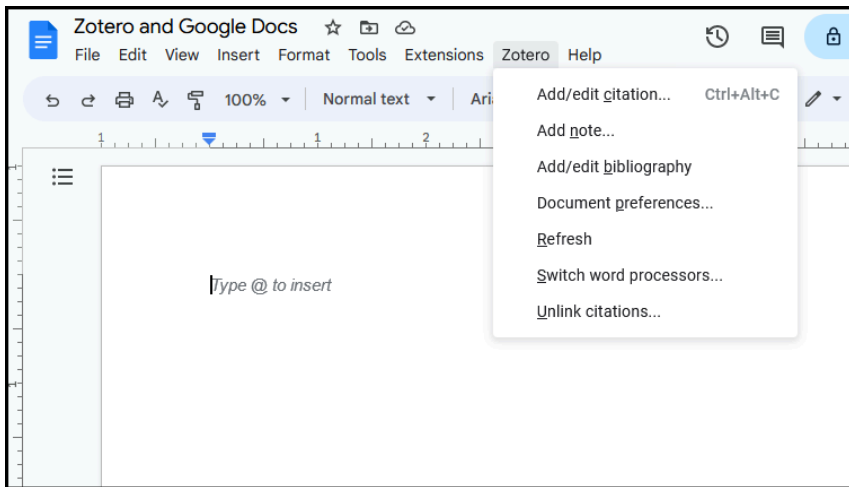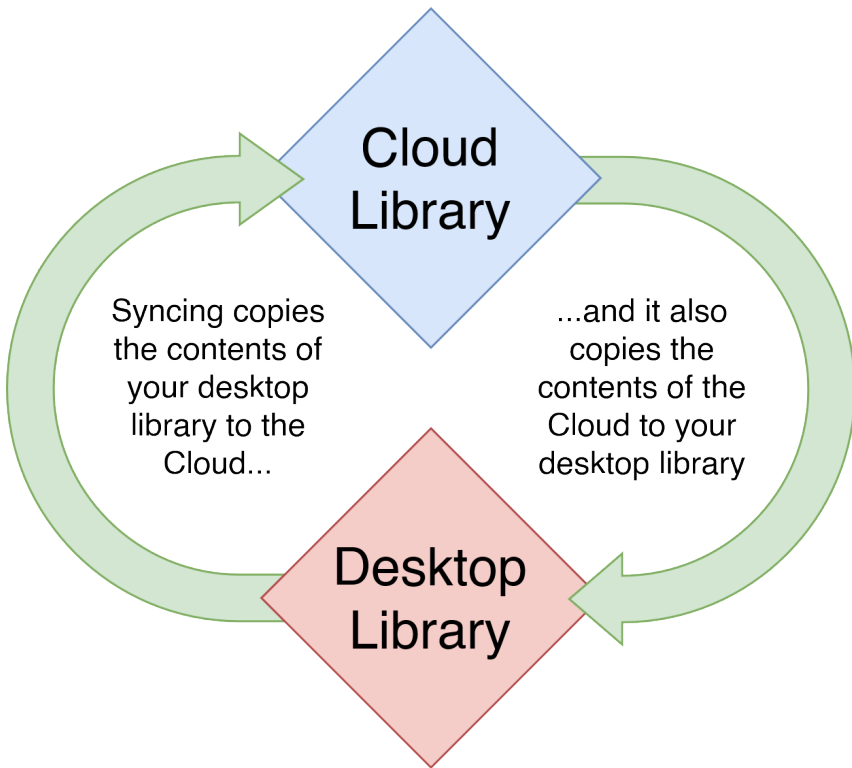

Note that when you are working with the Zotero feature for the first time in Google Docs, you will be asked to authenticate the plugin using your Google account. This authentication step is not related to any Zotero account you might have (see next chapter for more), and a Zotero account is not required to use the program with Google Docs.

5.

Zotero in the Cloud

Are you interested in accessing your Zotero library on more than one computer? If so, look no further than Zotero's powerful syncing function, which enables you to copy your library to Zotero's online server and share it across multiple devices. This allows you to access and edit your library whenever—and wherever—you need to!

So what exactly happens when you sync a library? Simply put, syncing will copy all of the citations in your desktop library up into the Cloud; additionally, it will copy any cloud-based citations down into your desktop library. This means that the sync function does *not* replace one version of your library with another: it simply synchronizes the content of your online and desktop libraries, ensuring that both display the same thing.

Cloud
Library

Syncing copies
the contents of
your desktop
library to the
Cloud...

...and it also
copies the
contents of the
Cloud to your
desktop library

Desktop
Library

Setting Up the Syncing Function

To sync your library, you first need to register for a free Zotero account at https://www.zotero.org/user/register. After creating an account, you will then need to log in through Zotero itself. The steps to do this are as follows:

1. Open up Zotero. Then, in the toolbar, go to **Edit → Preferences** (PC) *or* **Zotero → Preferences** (Mac).
2. From the Preferences window, click on the **Sync** tab (A).
3. On this page, enter the email and password that you used to set up your Zotero account (B).
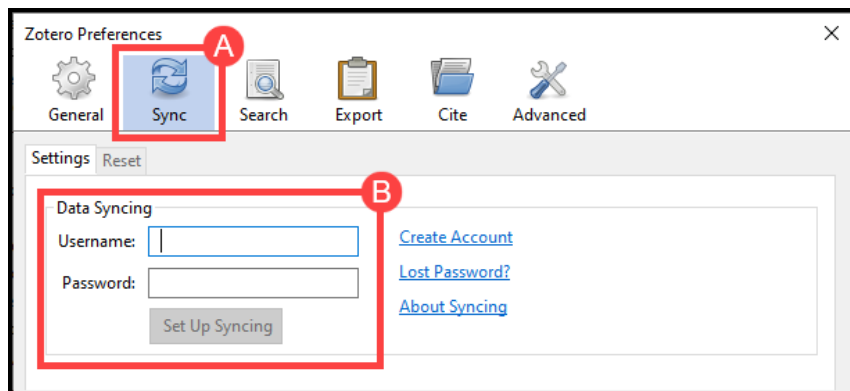
4. Since the Zotero online account has limited storage space, it is recommended that you uncheck the **Sync attachment files in My Library using...** and **Sync attachment files in group libraries using Zotero storage** options (C).

5. Click **OK** (D).
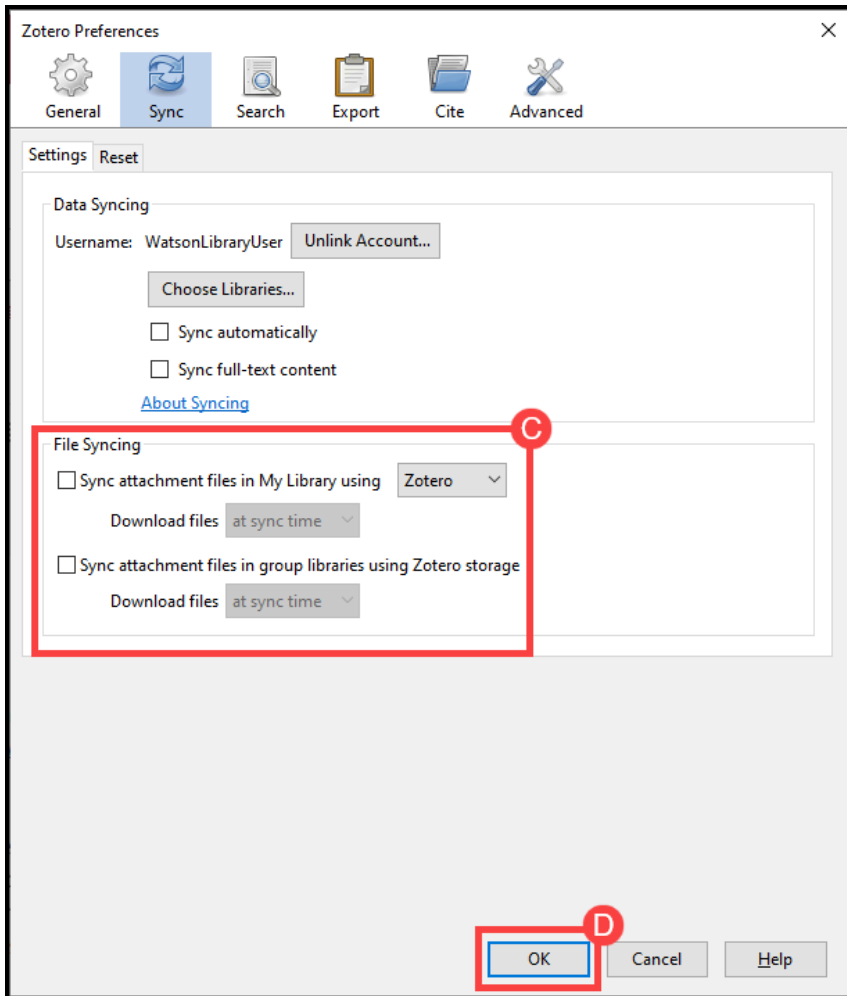
6. Now that you have connected your Zotero program to your online account, you can sync your library. To do this, click on the **Sync** button located on the Zotero toolbar:
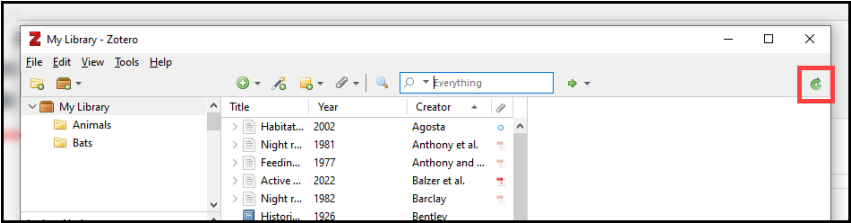
Expanding Your Storage Quota

Zotero offers users 300 MB of free online data storage. If you are just syncing citational information, this quota is often more than enough. However, if you would like to sync a large collections that contain copious attachments, you will find yourself quickly running out of space. Luckily, Zotero offers several tiers of paid subscriptions that will expand your storage quota. These tiers are as follows:

Storage Quota	Price (Per Year)
300 MB	Free
2 GB	$20
6 GB	$60
Unlimited – Individual	$120
Unlimited – Lab (Minimum 15 users)	$450 + $30 per additional user

To upgrade your storage, log into your Zotero account through your web browser and choose your desired tier at the following URL: https://www.zotero.org/settings/storage.

Working with Group Libraries

Zotero also allows users to share citations and PDFs with other users through its "Group Library" feature. To set up a group library, follow these steps:

1. In Zotero, click on the **New Library** button and choose **New Group**:
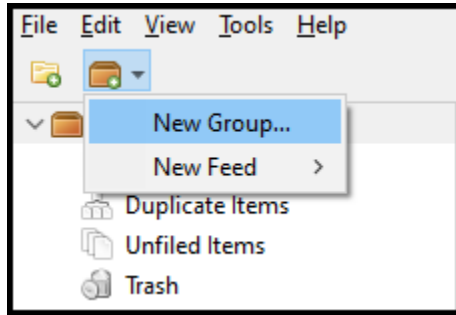
2. This will redirect you to the "Groups > New group" page on www.zotero.org. In the box provided, enter a name for your library (A).

3. Next, choose what type of group you want to create (B). The three types are as follows:

   ◦ **Public/Open** means that "anyone can view your group online and join the group instantly"
   ◦ **Public/Closed** means that "anyone can view your group online, but members must apply or be invited"
   ◦ **Private** means that "Only members can view your group online and must be invited to join."

4. Finally, click **Create Group** (C).

5. After creating your group library, you will be redirected to the "Groups" page on www.zotero.org. To invite others to your group library, click the **Manage Members** link under the title of the group library in question:
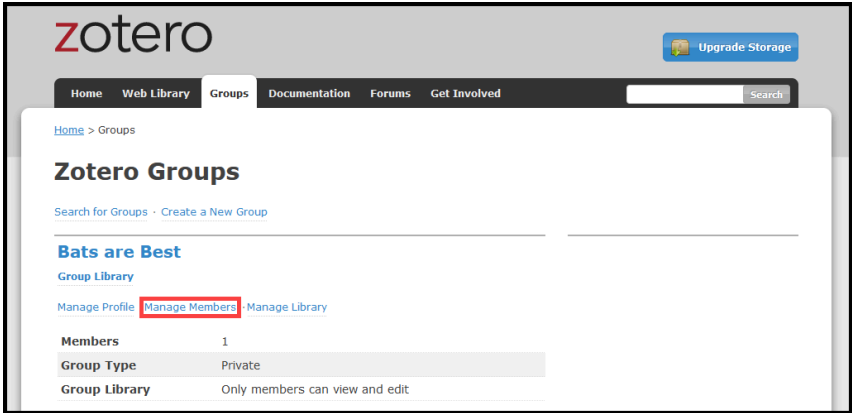
6. This will redirect you to the Members Settings page for your group library. To add members, click on the **Send More Invitations** link (A) near the bottom of the page. In the space provided (B), type out the e-mail addresses of the people who you wish to share your library with. When you are ready to send out these invitations, click the **Invite Members** button (C):
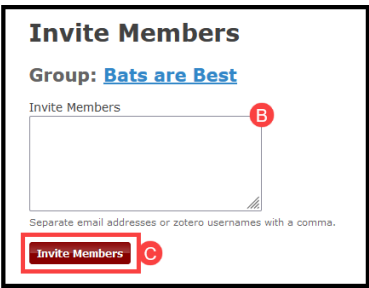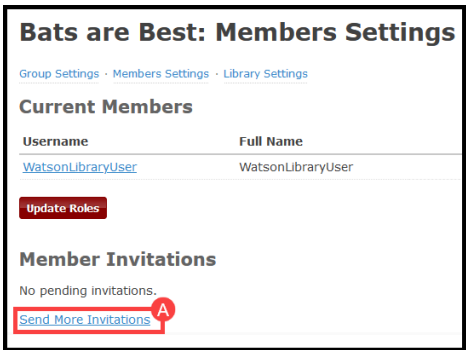

7. When finished, return to your Zotero library and lick the **Sync** button. Once the sync is complete, you will see the new group on your local Zotero library under the "Group Libraries" listing:
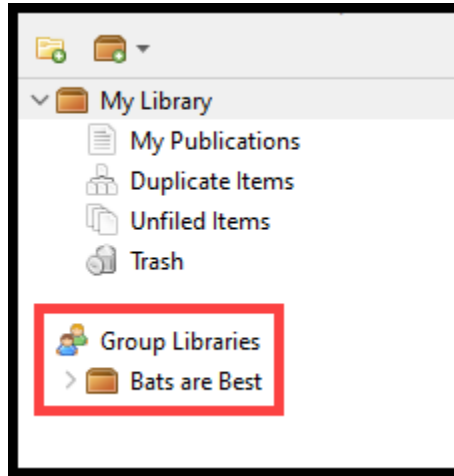
You can now drag citations into this group to share; these citations will sync with your cloud account and also appear in the Groups tab of anyone with whom you have shared the library.

Accepting a Group Library Invitation

Those who have been invited to join your group will receive an email providing a link through which to accept or decline your invitation.
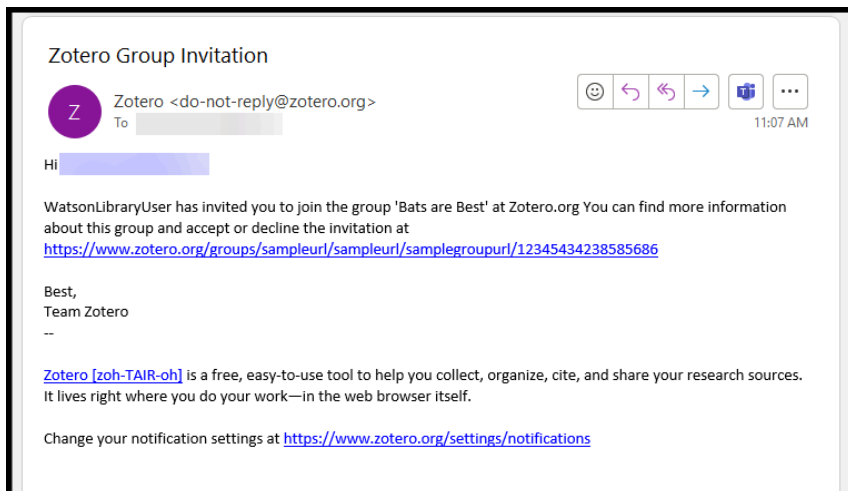
Those who have not already registered with Zotero will have to do so before they can accept the invitation. Those who already have a Zotero account will simply be directed to a login screen and then will be given the options to *join* the group or *decline* the request.

Deleting or Changing Permissions for Group Library Members

Zotero allows you to designate whether your invited group members will simply be able to view the information you have shared (i.e., they are "members") or whether they will be able to both view it and make changes to it (i.e., they are "admins"). You can change these permissions, or remove a group member entirely, from the group settings area in the Zotero cloud library but only after they have accepted your invitation to join.

1. Log into your account on www.zotero.org and then click on the **Groups** tab.
2. Find the name of the group library that you want to edit and click **Manage Members**. (You will only be able to change these settings for groups that you created.)
3. The members of the group library are shown with a drop-down box indicating their role. Choose the appropriate role from the box then click **Update Roles**.

Adding Items to a Group Library

To add citations to a group library that you have created or which you have been invited to, follow these steps:

1. Be sure that you have synced your Zotero libraries since the creation of the new group.
2. Go to your **My Library** folder. Then drag citations from this folder into the shared group library.
3. Click the **Sync** button when you are ready to upload your changes.

Bringing Items from a Group Library into your own Library

You can also bring citations from shared libraries into your personal library by following these steps:

1. Click on the shared library from which you would like to copy a citation.
2. Locate the citation in question and then drag it into your **My Library** folder. This will copy the citation into your personal library.
3. Click the **Sync** button when you are ready to back up your personal library.

Additional Resources:

Official Zotero Documentation Center: https://www.zotero.org/support/

Zotero Forums: https://forums.zotero.org/discussions

KU Libraries' Zotero LibGuide: http://guides.lib.ku.edu/citation/Zotero

KU Technology Training Workshop Calendar: https://workshops.ku.edu/

Need Further Help? Email zotero@ku.edu