KONSTFACK
University of Arts, Crafts and Design

Guide to the Reference Management Program Zotero

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Zotero

Zotero is a free reference management program for collecting, organizing, and using references. Zotero automatically detects different types of content when you browse the web, allowing you to save references with a single click. The references can be imported from various databases, library catalogues and other sources to create your own searchable database of references. The references

can then easily be inserted into a document in a word processing program along with a correctly designed bibliography in the reference style of choice, for example Oxford or Harvard.

The benefits of using a reference management system are many:

o Zotero reduces the risk of incomplete or incorrect references when completing a text
o Zotero collects all references in a searchable database and makes it easy to search and sort references
o With Zotero, references do not need to be written manually
o With Zotero, a bibliography can be automatically created according to the chosen reference style
o With Zotero, it is easy to switch between different reference styles if needed
o Zotero is free, therefor you can continue using it even after leaving Konstfack

Download Zotero

For Zotero to work, your computer must have MSOffice or LibreOffice installed. This guide is based on Windows and Microsoft Word. Note that some may look different on a Mac computer. Make sure that all office programs / word processing programs are closed before starting the installation.

Download the **Zotero program** and a so-called **connector** for the browser (Chrome, Firefox, Safari or Edge) you use. The connector is needed for the browser and the Zotero application to communicate:
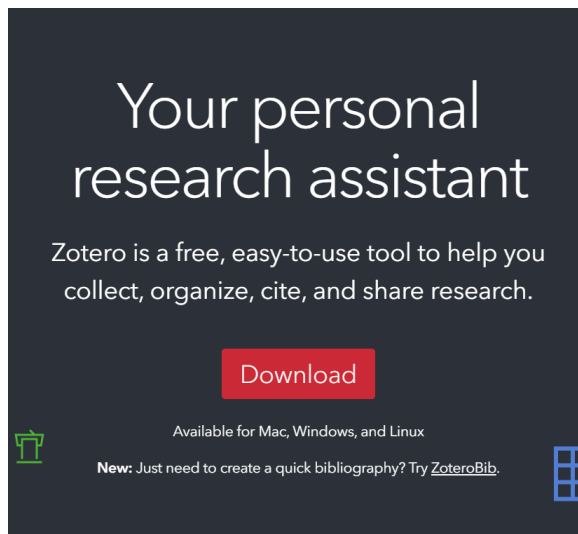
1. Go to Zotero's website: https://www.zotero.org/

Click **Download**

2. Choose which browser you want to use. Click on Zotero Connector for other browsers and select the connector for the browser you are using. The appearance may differ slightly between different browsers, but the features are still the same.

After you have downloaded both the Zotero program and a connector for your browser, a Zotero icon will appear in the upper right corner of the browser. The icon has the shape of a **Z** that changes depending on the material (article, book, website, video…) that is searched in the browser.

Some examples of what the Zotero symbol looks like:

The Zotero symbol, appears in the browser when the connector is downloaded in the browser

Book, for example from a library catalogue such as Libris

Article, for example from a database

Multimedia / video, for example a Youtube video

Folder, to save several references from a search result list at the same time
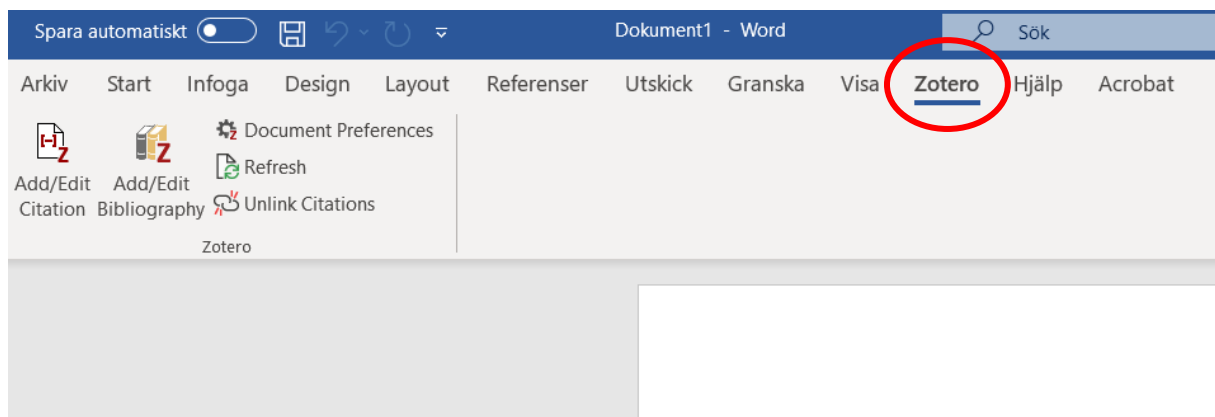
Zotero in the word processing program

In order for Zotero and word processing programs (e.g. Word or LibreOffice) to be able to communicate, a connection is needed.

If a Zotero tab does not appear in the word processing program menu bar, do the following:

1. Close the word processing program (NOTE: It is not enough to minimize the program).
2. Open Zotero, go to **Edit → Preferences → Cite → Word Processor**. Install the add-on for the desired word processing program.
3. Open the word processing program again. If no Zotero tab appears in the menu bar, the computer may need to be restarted.

If the Zotero tab is still missing from the word processing menu bar after restarting your computer, do the following:

1. Close your word processing program (NOTE: It is not enough to minimize the program).
2. In the Zotero application, go to **Tools → Add-ons → Extension → Disable**
3. Then click **Restart now.**
4. Zotero is now restarted. To reinstall the add-on to your word processing program, go back to **Tools → Add-ons → Extension → Enable**. After this, the Zotero tab should appear in the menu bar in the word processing program.

Zotero tab appears in the menu bar of the word processing program Word. Click on the Zotero tab and Zotero's various functions will appear in the toolbar.

Select reference style

To specify what reference style to use in Zotero, click **Edit → Preferences → Cite → Styles** and select the reference style you want to use, such as Oxford or Harvard. If you do not find the reference style you want to use, click **Get additional styles…**

Change language in Zotero

To change the language of Zotero, click **Edit → Preferences → Advanced** and select **Language.**
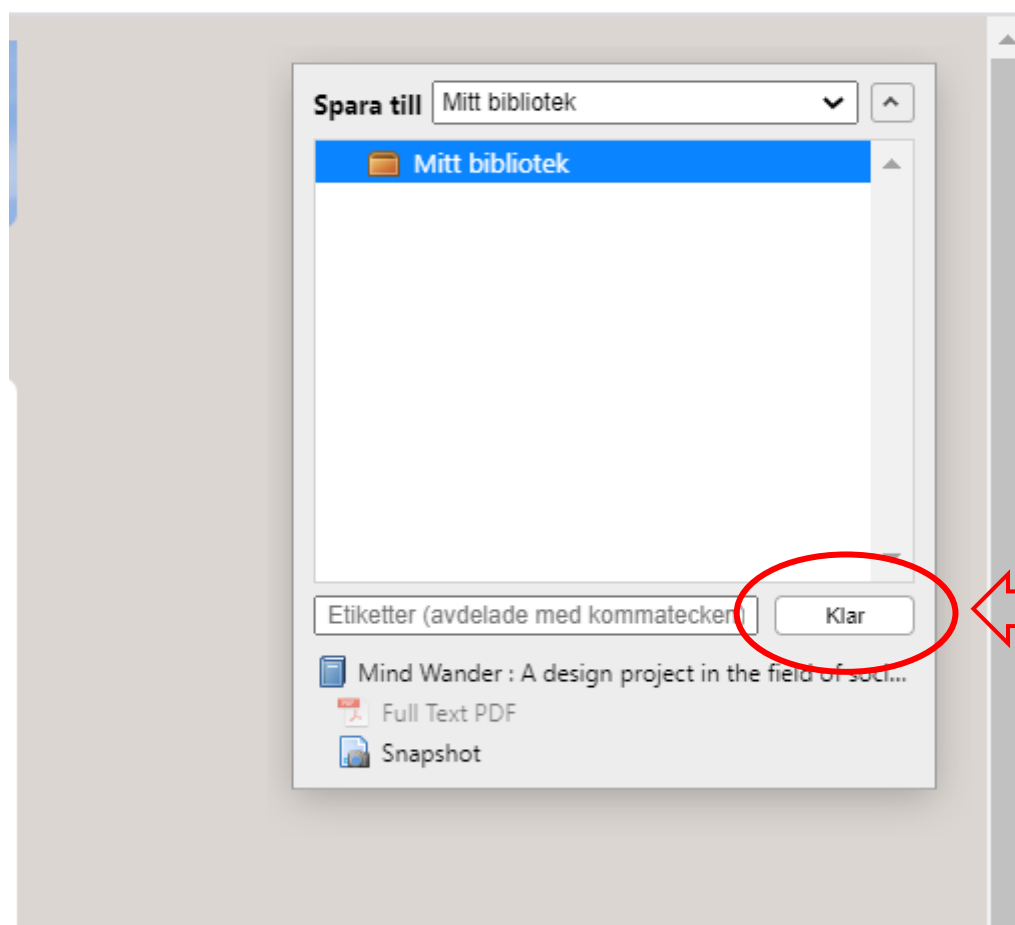
Save references

Find the reference you want to save to your Zotero library. It can be a book from a library catalogue, a journal article from a database, a video from Youtube or an article from a daily newspaper. Note that the Zotero program must always be open when saving references from the web.
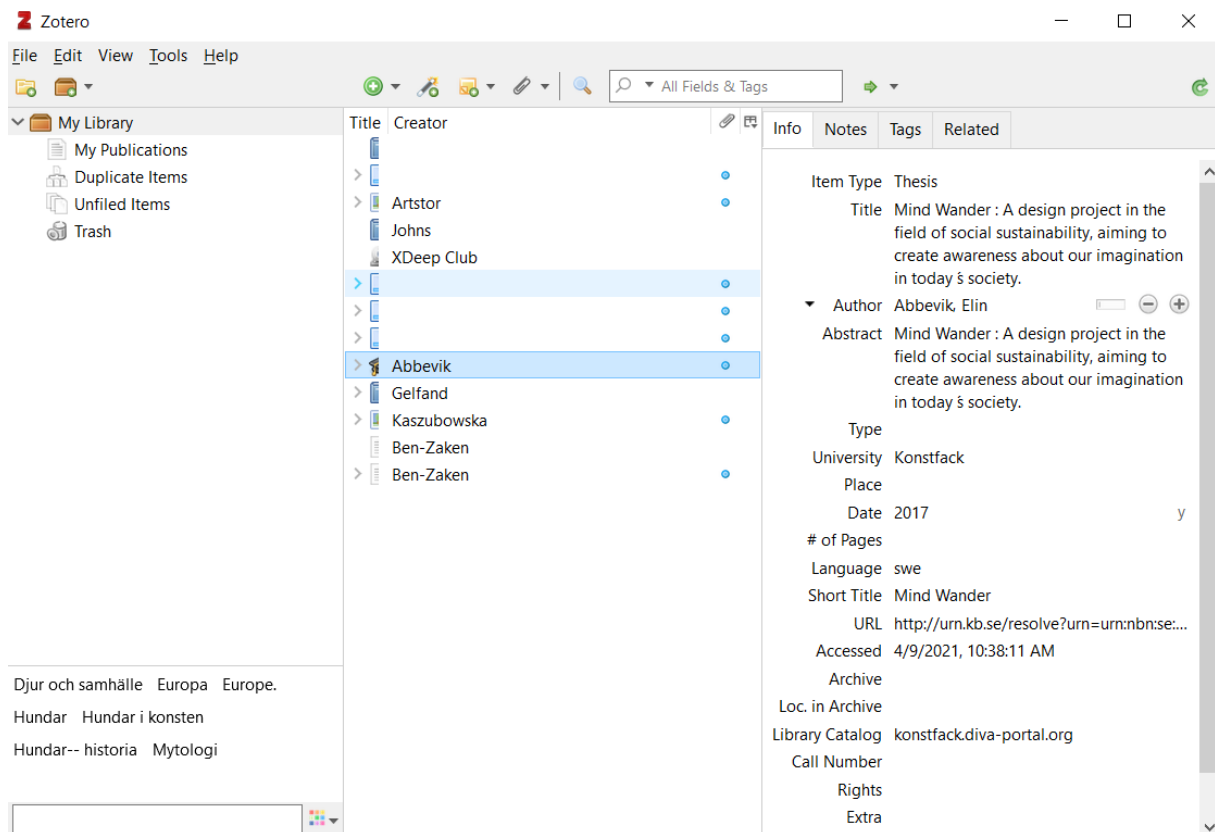
The Zotero icon **Z** changes depending on the material being searched. Generally, you click on the Zotero icon in the top right corner of the browser to save a reference to your Zotero library, no matter what type of material you want to save:
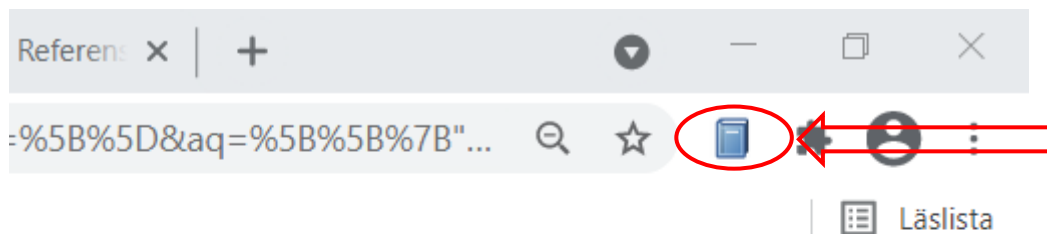
Click on the Zotero icon in the browser

Click **Done** to save the reference to your Zotero library

The image above shows what the saved reference looks like in the Zotero library. In this case, information about the type of thesis, place and pages were not included when the reference was saved but can be entered manually in the **Information bar**.

A blue circle ⬤ appears next to the saved reference. This indicates that a full text (PDF) has been saved together with the reference. Double-click the blue circle to open the full text.

Save images, videos, multimedia

Zotero operates better for saving written references such as books, articles, and reports, but other references can also be saved in Zotero, such as images and videos. This is done in the same way as with written references, i.e. the material is searched for and saved by clicking the Zotero symbol in your browser. Images will be saved as Web page with Snapshot. In your Zotero library, you can then change the Item Type from Web page to, for example, Artwork or any other suitable Item Type. You can also fill in or change information about the saved item:
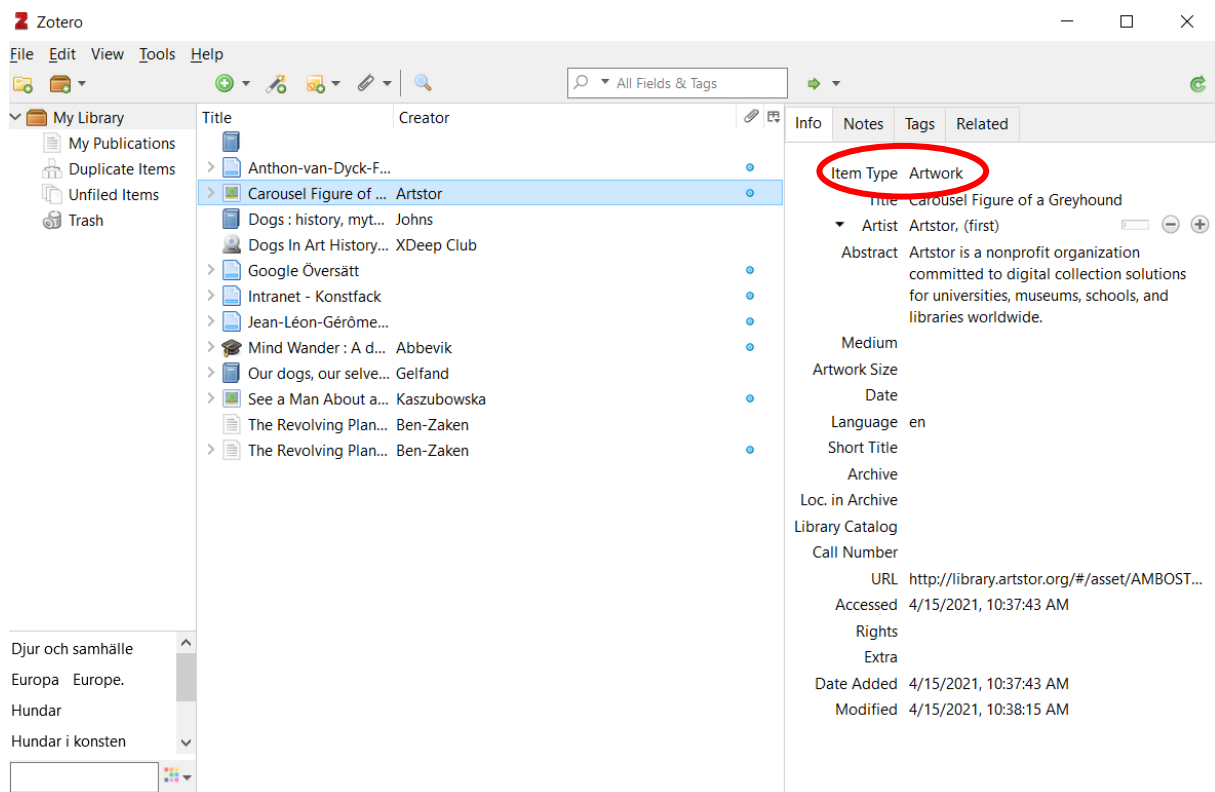
## Save entire list of search results or folder

To save an entire list of search results, for example when searching a database, click on the folder icon. A box will open. Select which references to save to Zotero. If all are to be saved, click **Select all** and then **OK**. Any full texts available will be included.
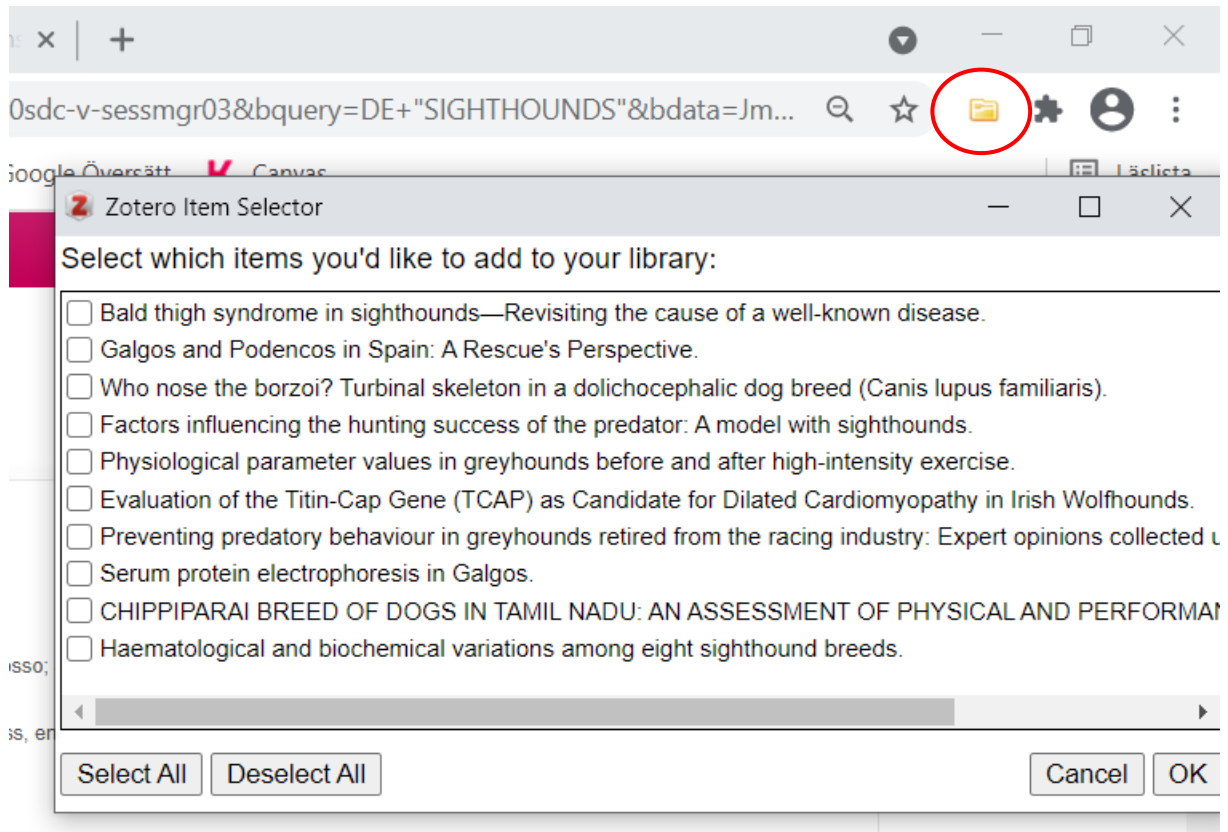
Save references by identifier

References can be imported into Zotero using DOI or ISBN. Many journal articles have a DOI number, a unique identification number. This can be entered directly into Zotero to save a reference. The same goes for books' ISBNs. To import references via DOI or ISBN click **Add item(s) by Identifier**. Enter DOI or ISBN and press **enter / return**. If the reference number is not found and the reference therefore cannot be imported, it is recommended to save the reference from a library catalogue or database (see above) or enter the reference manually (see below).
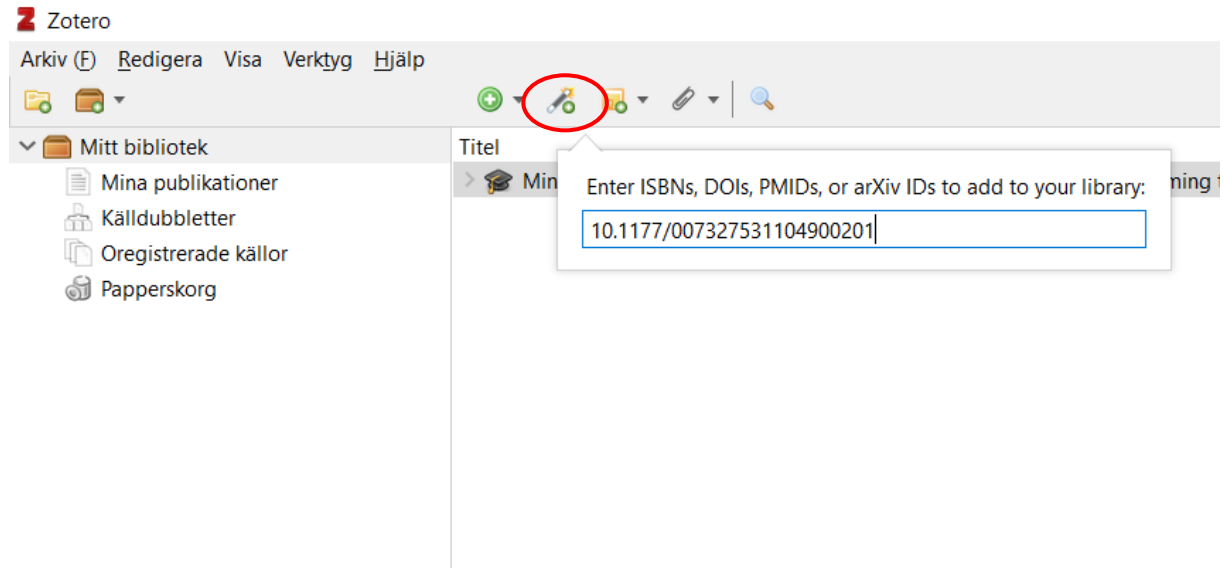
Enter references manually

If a reference cannot be found in a database or library catalogue or the like, it can be entered manually in your Zotero library. Click the New Item button, select the type of reference and then enter the information in the **Information bar** on the right. See different reference style guides, for example Oxford or Harvard, for information on which fields need to be filled in order for the reference appear correctly.
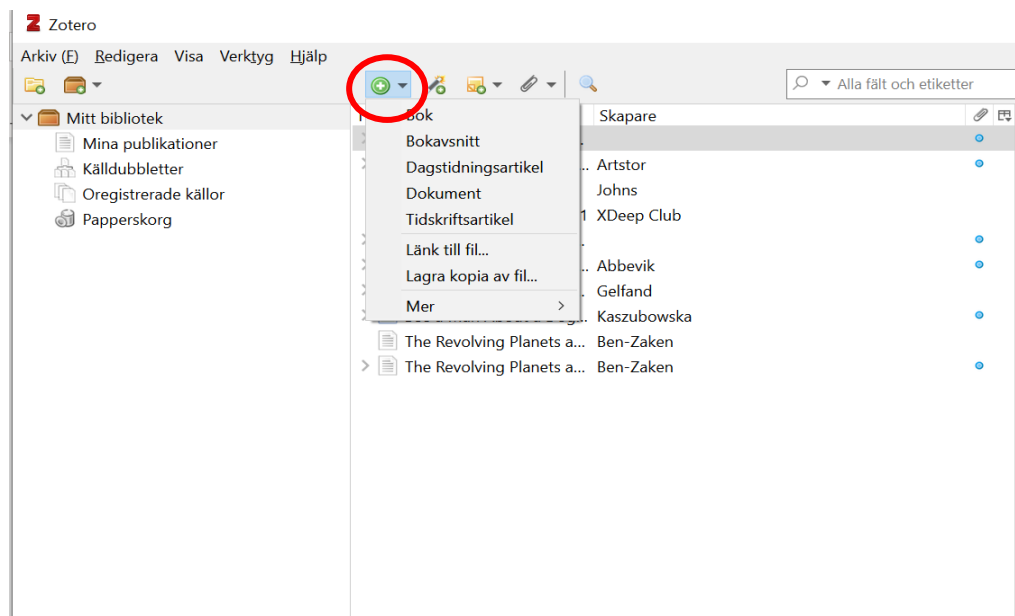
Reference from PDF

If you have references, such as an article, in PDF format saved on your computer, Zotero can often create references of metadata contained in the PDF. To do this, **drag** a PDF from where you have saved it on your computer and **drop** it in your Zotero library. You can also click **New Item → Store copy of file** in Zotero and search for the PDF you want to use.

If this does not work, it may either be because no metadata is found for the selected PDF or this function is not installed. The metadata retrieving for PDFs can be found under **Edit → Preferences → General → Automatically Retrieve Metadata for PDFs:**
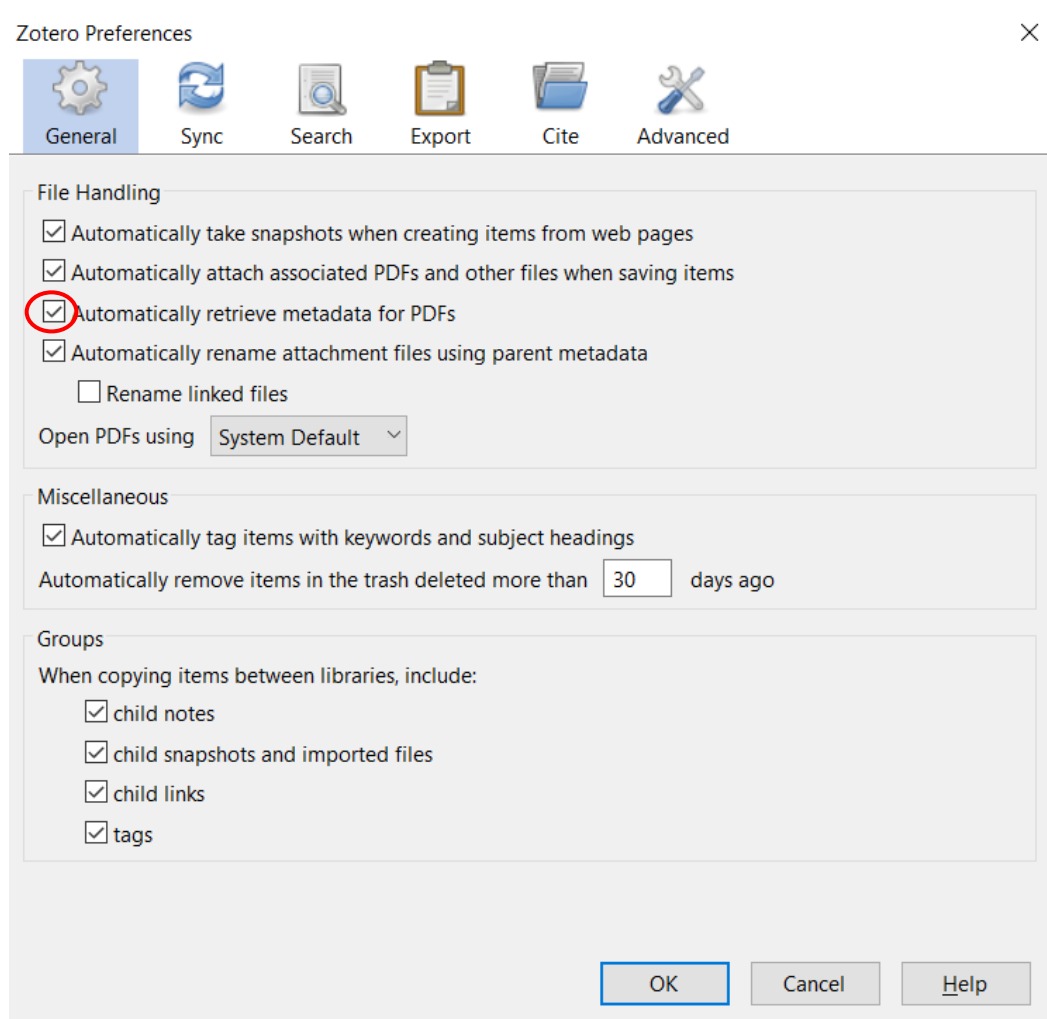
Add files

Drag and drop a file into your Zotero library and a copy will be stored in Zotero. If the file is dragged to an existing reference, the file is attached to the reference. You can also right-click on a reference in your Zotero library to add a file. Select **Add attachment**, and then search for the file on your computer.

Organize references and create folders

To organize references in Zotero, you can create different folders. Click on **New Collection…** at the top left corner:

 New collection…

Give the new collection a name and click **OK**. Drag and drop the references to move them between different folders. All references, regardless of whether they are in a folder or not, are found in the top folder called **My Library.**

Trash

If a reference is to be deleted, drag it to **Trash**. You can also right-click on a reference and select **Move Item to Trash …** Right-click **Trash** and click **Empty Trash** to empty it.

Incorrect references

Always check that the saved references are correct. Sometimes not all bibliographic information is included when a reference is saved to Zotero. For example, journal issue, pages or authors may be left out. This can easily be added manually in your Zotero library by marking the incomplete reference and fill in the missing or incomplete information in the **Information bar**. Any changes made are automatically saved when entered. If you correct references in this way, you only need to do it once. The reference will then be correct when inserted in a document in a word processing program.

Insert references in word processing program

The Zotero program must be open when references are to be inserted into a text in a word processing program. Zotero's toolbar in Word looks like the one below. If another word processing program is used, the toolbar may look different.
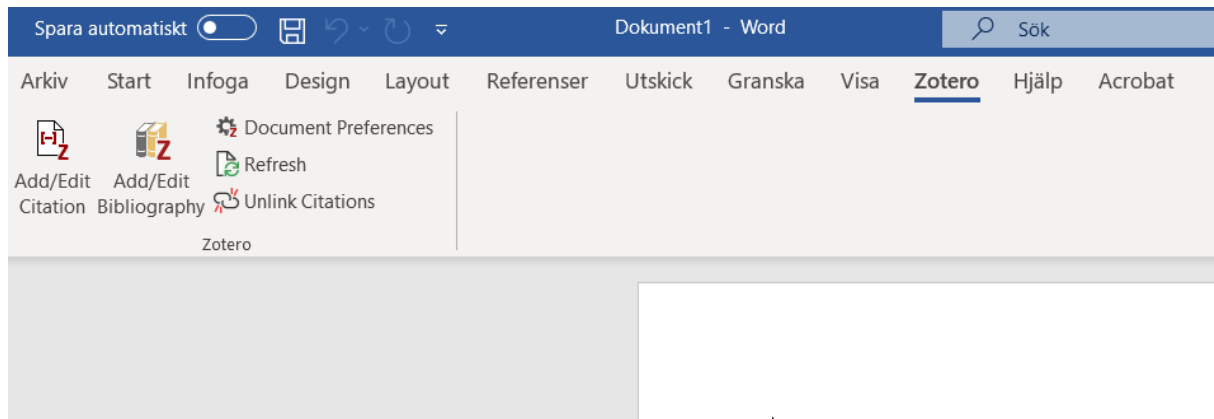
Place the cursor where a reference is to be inserted. Click **Add / Edit citation** in the Zotero toolbar in the word processing program. The first time you do this, a box will appear where desired reference style is selected. Also select language. Then click **OK**.

In the Zotero search box that appears, you can search for the title or author of the reference to be inserted. Click **Enter / Return** to insert the reference.

To scroll through all the saved references, click the **Z** in the box and select **Classic view**. Your entire Zotero library will then be visible. Select the reference to be inserted in the text and click **OK**.
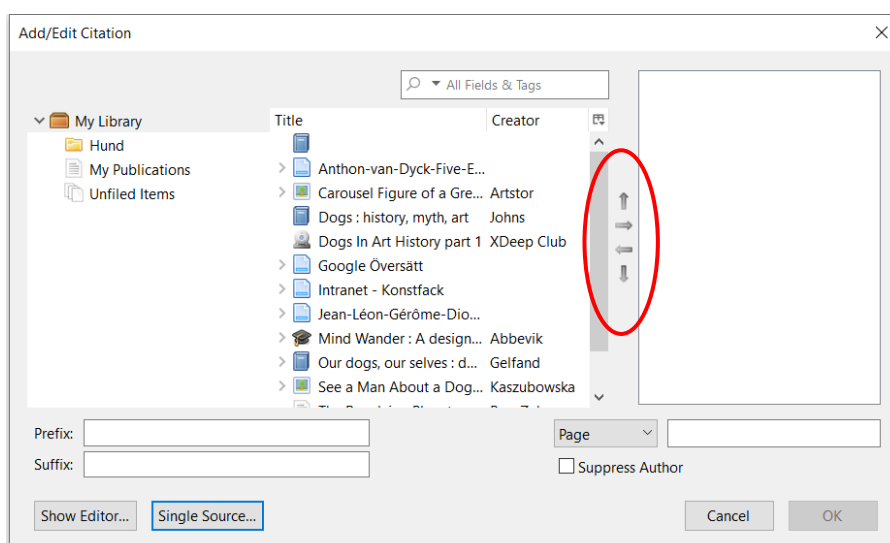
To insert several references in the same note, click on **Multiple sources** and use the arrows to select the references to be inserted in the box to the right. Click **OK**.

Create bibliography

To create a bibliography, place the cursor where you want the bibliography in your document in the word processing program and click **Add / Edit Bibliography**. The bibliography is designed according to the selected reference style and the references are placed in alphabetical order:
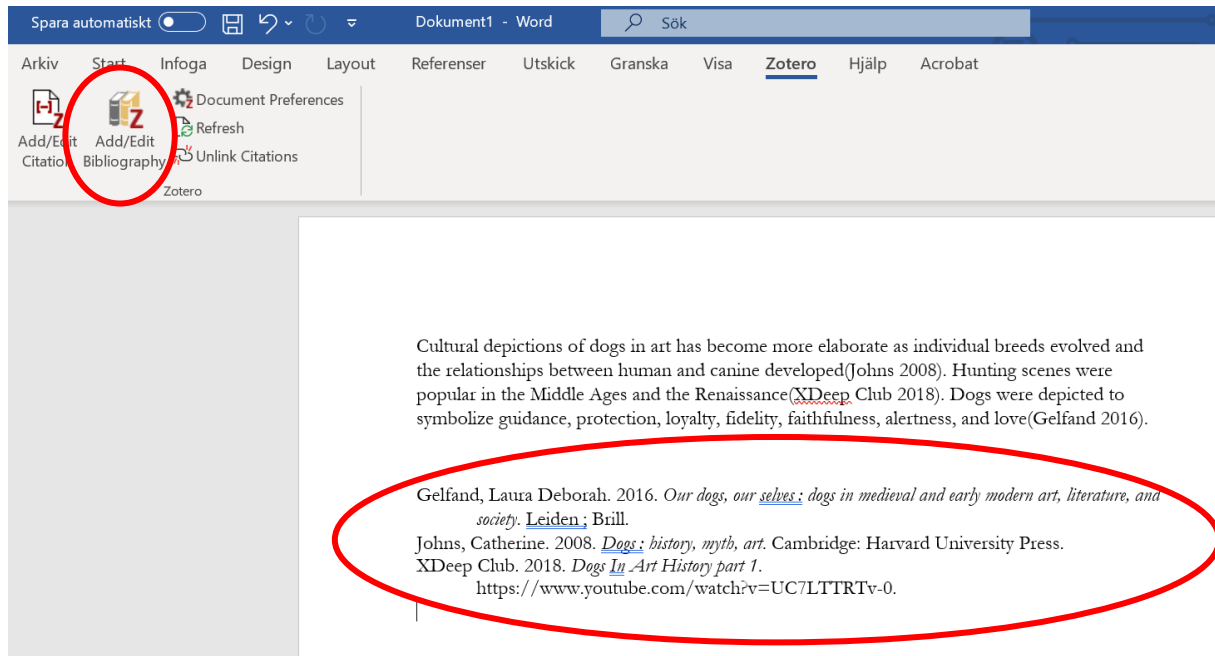
The bibliography is automatically updated when a new reference is inserted in the text. If a reference is deleted from the text, it will also be deleted from the bibliography when you click the **Refresh** button, provided that the reference only appears once in the text. If the reference appears twice or more in the text and one is deleted, the reference will remain in the bibliography after clicking the **Refresh** button.

If a reference does not appear correctly in the bibliography, according to the selected reference system, this can be changed in the Zotero library by marking the incorrect reference and correcting it in the **Information bar**. In this way, an incorrect reference only needs to be corrected once. Update the bibliography in your text by clicking **Refresh** and the error will be fixed.

Unlink Word and Zotero

When you have finished your text, you can save a copy of the document and in this copy click **Unlink Citations**. This will give you a copy without any Zotero codes or connection to your Zotero library in the document.

Please note that if any changes in the references are made manually when the document and Zotero are still linked, the references will return to Zotero standard as soon as an update is made (when clicking **Refresh)**.

Sync, back up and share references

To be able to sync and access your Zotero library anywhere, you need a Zotero account. It's free and allows your Zotero library to be synchronized with Zotero's web server. With an account, you can also join groups to share references with other Zotero users and back up attachments.

Start by creating an account on **zotero.org → Log In → Register for a free account**

Then go to **Edit → Preferences → Sync** in Zotero. Fill in the selected username and password and tic the box **Sync automatically** and **Sync full-text content**. Your Zotero library will be synchronized and backed up in the future.

You can also create groups to share references with other Zotero users. An account on Zotero is required for this function. Create an account on **zotero.org → Log In → Register for a free account** Click **Create a New Group** when you are logged in to Zotero.org.

Groups can be private or public. Go to https://www.zotero.org/groups/ and click on Manage Members for the group you want to invite someone to. You need to be logged in to your Zotero account to do this.

More information and help

If you have any questions, check **out http://www.zotero.org/support/**

or

contact the library at Konstfack **biblioteket@konstfack.se**

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