Guide to Zotero

NOTE: In this guide we focus on Zotero in Windows 10 with MS Word 2016.

- Some features are missing in previous versions of Zotero, Windows and MS Word.
- Zotero and MS Word on macOS may work a little differently.
- Read more about the system requirements here.

Install Zotero and create an account

Install Zotero on your own computer

Make sure that all Office programs and word processing programs are not running when you start.

- LiU students can download the program from **zotero.org.** Click on Download.
- LiU employees can download the program through the self-service portal Min IT.
- Register an account. To access your Zotero library of references on the web, you first need to register an account. Go to **zotero.org** and click on Register and follow the instructions.

Install the Zotero connector in your browser

To be able to import references (e.g. books and articles) to **Zotero** and insert them into your text, you need to download a so-called **Connector** to your browser. The Connector-extension is available for Chrome, Firefox and Safari from **zotero.org**. Just click on **Download**.

you now have:

- A Zotero desktop icon that you click to open your Zotero library.
- An extension in your browser that can import references to Zotero.
- A plugin for your word processing program MS Word that can insert references into your text.

Synchronize references

- You need to synchronize references and files in your Zotero desktop library with the Zotero web server so that you can access them no matter what computer you use.
- From inside **Zotero**, go to **Edit → Preferences → Sync**
- Enter your username and password and select **Set Up Syncing**. Click **OK** to exit.

The document was last updated on 2021-01-15.
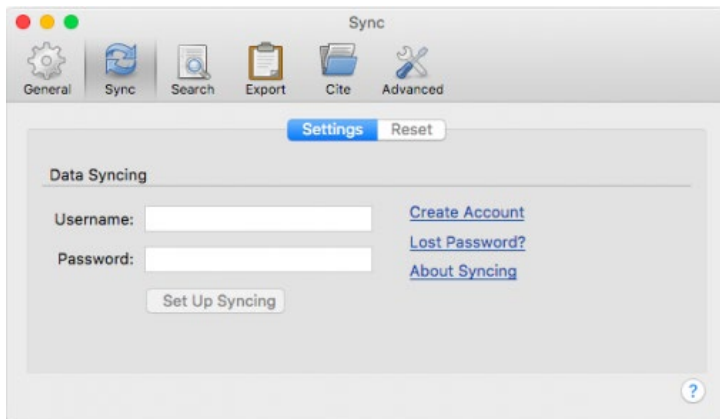
- Click on the ⟳ symbol to sync with your Zotero account online.

Import references to your Zotero library

When you are searching in a library catalog, database or search engine there is an icon (book, document, folder or web page) in your browser:
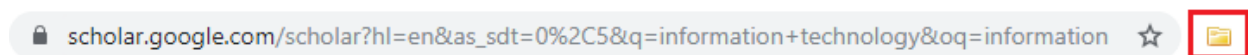
When you click on the icon, the reference is saved directly in your Zotero library. When you click on the folder icon, you can choose to save multiple references at once.

NOTE! Sometimes all the information about the reference is not included in the imported reference. This is most frequent with web pages and articles. For example, you may need to supplement the author, title or magazine number yourself. Always check the references in your Zotero library to make sure that your references and reference lists are accurate!

- If the correct icon is not visible, you can create a reference to a web page by clicking on the web page icon ▭ that is visible. A reference is then created based on the information that Zotero can find on the web page, and then you must supplement this reference yourself with the missing information.
- You can enter references manually into your Zotero library. Click **New item** ⊕ and select the type of material you want to post. Then just enter all your information regarding author, title, etc.
- You can add references using arXiv ID, ISBN, DOI or PubMed ID. Click **Add Item(s) by Identifier** and enter the number.
- If you have PDF articles on your computer, Zotero can sometimes create references to the metadata contained in the PDF. Drag and drop a PDF into Zotero, or click **New item** ⊕ and **Store Copy of File** and extract the PDF you want to save to your computer. Now the PDF is saved and added to your Zotero library and a reference is created. **TIP!** you can then easily search in the full text of the PDFs via the search box.

The document was last updated on 2021-01-15.

Organize and share references

You can create different folders to organize your references. Click on **New Collection** 🗂 in the top left corner. Drag and drop the references to shift them between folders. In **Unfiled Items** you will find references that you have not yet assigned to a folder.

**you can create groups to share references with others.**

- Click **New Library** 📚▾ → **New Group** in Zotero.
- A web page opens, and you need to log into your Zotero account online.
- Here you create your group; you can have both private and public groups. Make your selections and click **Create Group**.
- To invite members to your new group, click **Members Settings** → **Send More Invitations**.
- Then enter the email addresses of the people you want to invite to your group and click **Invite Members**.
- In order for the group to be visible in your desktop Zotero, click on sync 🔄 .
- Your group will now appear under **Group Libraries** and you can now drag and drop your references to and from this group.

Insert references in MS Word

1. You can find the Zotero Word plugin under the Zotero tab in the MS Word toolbar.
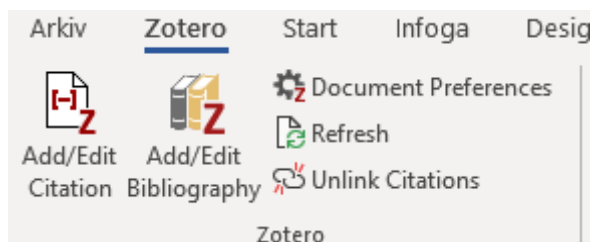

2. First, to choose which reference style you want to use, click **Document Preferences**. For example, select APA and click OK.

The document was last updated on 2021-01-15.
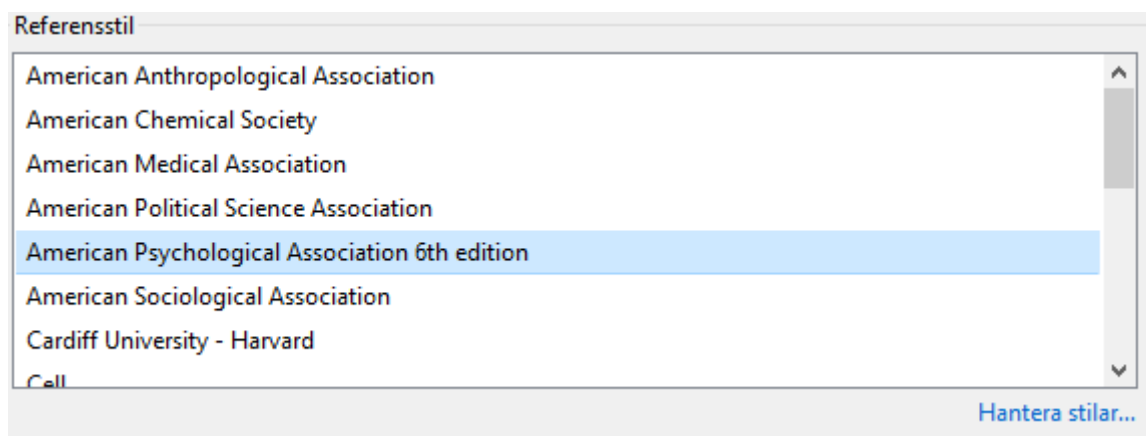
3. Place the cursor where you want a reference in your text and click **Add/Edit Citation**. you must have Zotero running when you do this. Now a box from Zotero appears in your document. you can search for example title or author and find the reference you want to insert and then click **ENTER** on the keyboard. Alternatively, you can click on Z and select classic view to browse all references in your Zotero library. Select the reference you want to insert and click OK.

4. Once you have entered the references in your document, place the cursor where you want your reference list and click on **Add/Edit Bibliography**. you can change the style of the references and reference list by clicking on **Document Preferences** and if you do not find a style that fits, you can find more under **Manage Styles**.

5. When you want to edit an existing reference, such as to insert a page reference or hide the author, place the cursor in the reference and click **Add/Edit Citation**. Now a box from Zotero will appear with the current reference. Click on it. A window opens where you will have the opportunity to edit the reference and for example select hide author. Click **ENTER** on the keyboard to exit.
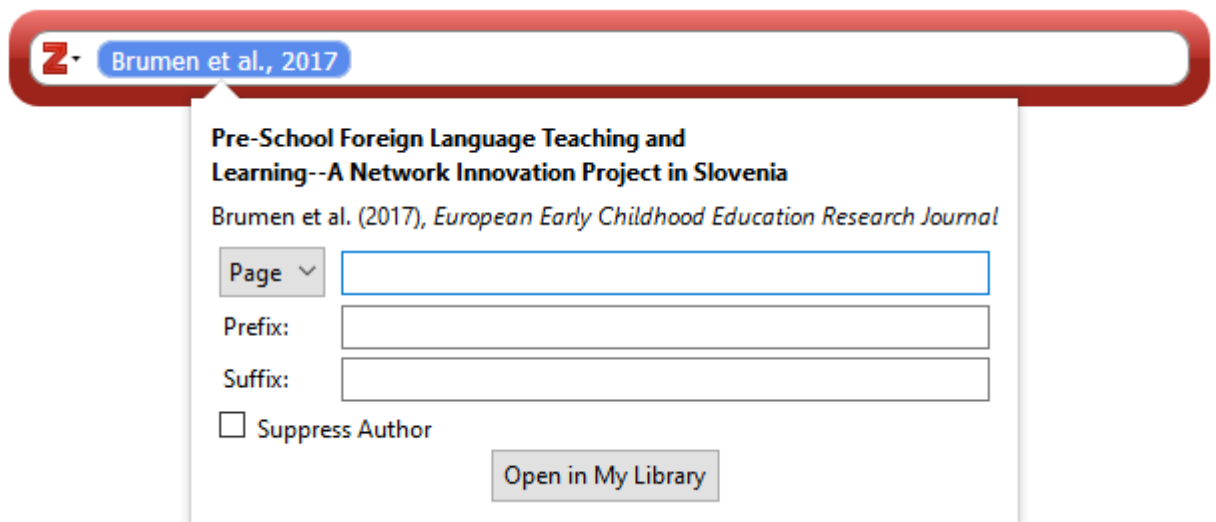

6. When you are done with your text, you should make a copy and remove the link to Zotero before submitting your text. Save a copy of your text first. Then click **Unlink Citations** to remove the links.

    NOTE! you cannot reproduce the references after unlinking them, there is a warning before you do, so it is important that you have a copy if you want to edit the document later.

The document was last updated on 2021-01-15.

Insert references into Google Docs

1. Zotero in Google Docs is linked to the Zotero connector in your browser and it currently only works with Firefox or Chrome.
2. You can find the Zotero plugin under the Zotero tab in the Google docs toolbar. Here, just like in MS Word, you can add and edit references and reference lists. you can also remove your link to Zotero before submitting your text.
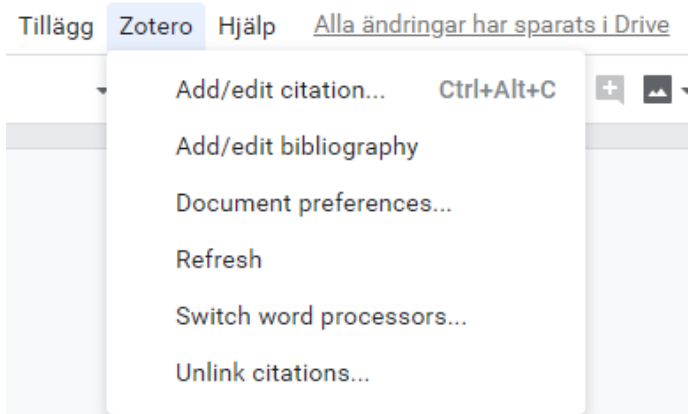
3. There is also a "Z" direct link function in the toolbar to easily add or edit references.
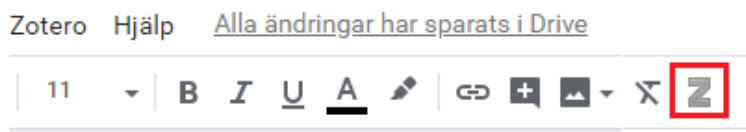
More information and help

- [Zotero Frequently Asked Questions](#)
- [Zotero Quick Start Guide](#)
- [Get Help with Zotero](#)
- [User Forums](#) (international discussion forum for Zotero users)
- Linköping University Library offers introduction to Zotero for students and staff.
- Visit our [website](#), [book an introduction](#) or contact us via [biblioteket@liu.se](#)

The document was last updated on 2021-01-15.