



zotero 7.0

Introductory guide: Mac and Windows

August 2024

This guide is a comprehensive introduction to using Zotero at Massey University.

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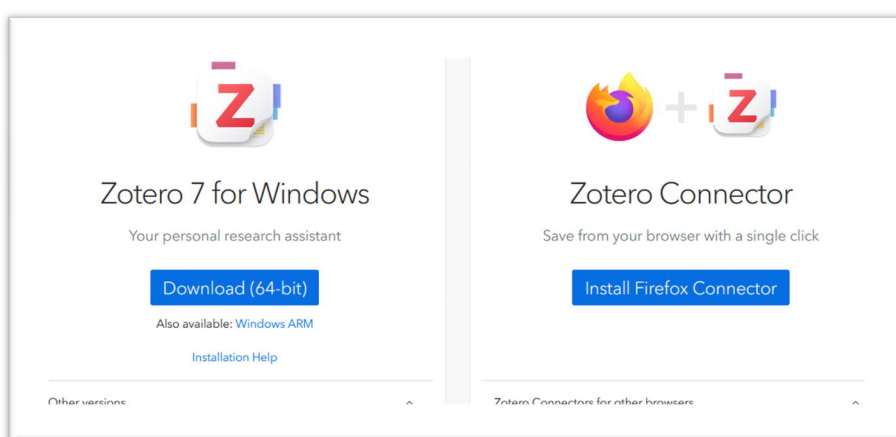
Getting & Setting up Zotero

Zotero 7.0 was released in August 2024. Core functionality remains unchanged, but new features have been added such as a redesign of the item pane, and the option to switch to 'dark' mode in the user interface as well as when viewing PDFs and EPUB content. Performance is faster than in version 6.0 and Zotero now supports Apple Silicon Macs and 64-bit Windows.

Download Zotero

1. Get and Install Zotero

Go to zotero.org/download and select Zotero 7.0 for Mac or Windows (as appropriate). Zotero will detect which operating system you're using.



Open and run the program. Once installed drag the icon to your dock/toolbar.

2. Install the Zotero connector.

Zotero will automatically detect which web browser you are using (prefer *Chrome*, *Firefox*, *Safari*, and *Edge*. Other browsers may be supported).

Restart your browser.

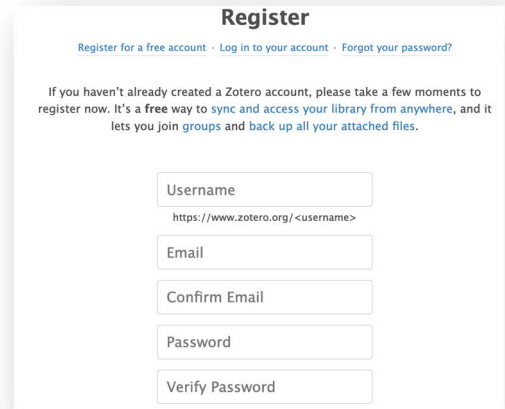
Mac users: note that you don't need to install a connector as it comes bundled with Zotero for Mac.

Instructions are on the download page. While *Safari* and *Edge* are now better supported there are a few inconsistencies – *Chrome* or *Firefox* are the preferred options.

Create & Sync your Zotero Account

Register for a free online Zotero storage account. You will be prompted to do this. If you are not, go to [Zotero.org/user/register](https://www.zotero.org/user/register)

This allows you to store all your sources on the Zotero cloud server, enabling syncing your library to other devices, creating group libraries to collaborate with other Zotero users and (usefully) backing up your library.



Storage

Note: You can store as many PDFs as you like in Zotero on your own device. However your free online Zotero account is limited to 300mb of storage, which can fill up quickly. Manage this in your settings [see below, and p.4]. Additional storage can be purchased (if required) on the [Zotero website](https://www.zotero.org)

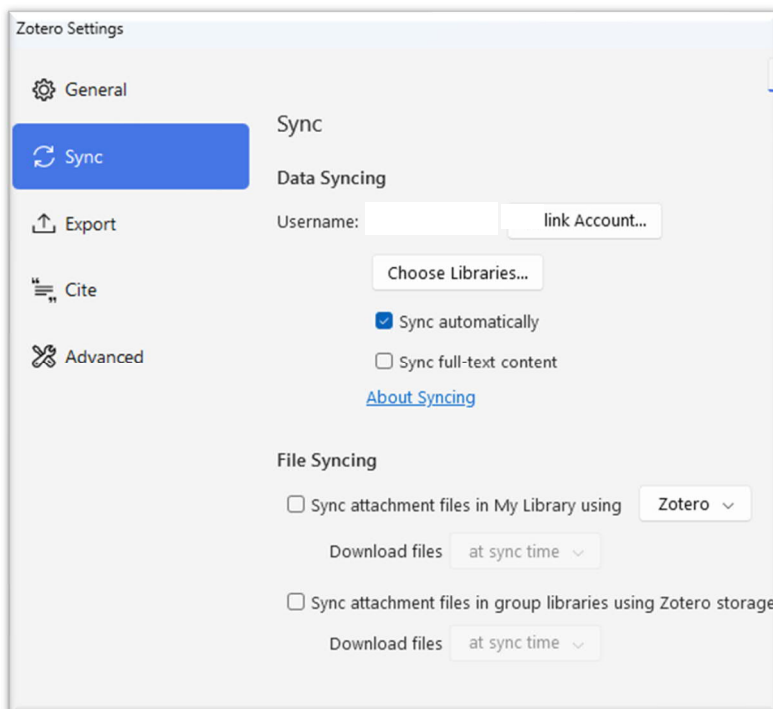
Configure your Settings

Open the Zotero application

On a PC: In the Edit menu, select Settings. On a Mac: In the Zotero menu, select Settings.

1. Enter your details in the Sync tab

.... enter the username and password you created when setting up your online Zotero account. Then click 'Link Account'.

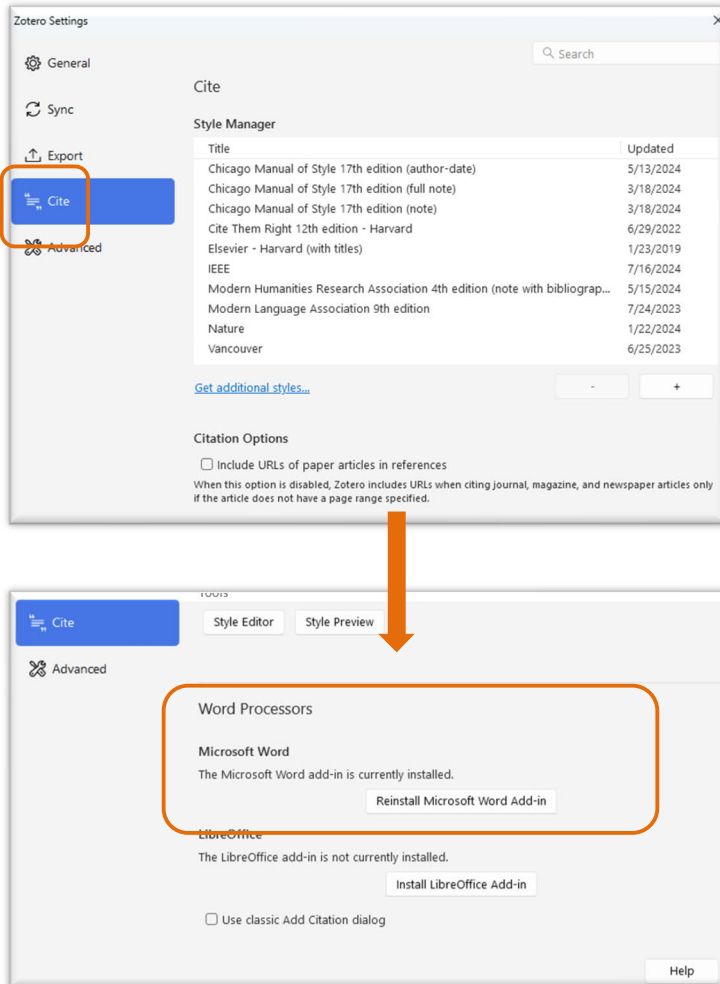


Unticking the File Syncing options (for attachment files and group libraries) is recommended unless you are likely to only have a small number of full-text PDF sources, or are willing to upgrade to a paid account for increased online storage in your Zotero Web/cloud library.

Leave the first Data syncing option ticked to allow syncing of source data between a Zotero library on different devices.

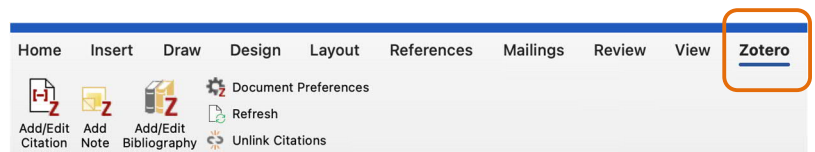
2. Install and activate the word processor plugin

Word processor plugins are bundled with Zotero and should be installed automatically when you first start Zotero. If not, select the Cite tab, then scroll down to the *Word Processors* section and click on Install Microsoft Word Add-in to get the latest version. A restart of Word may be required.



Next, open *Word* to look for the Zotero toolbar – select the Zotero tab:

If it's not there go to [Word Processor Plugin Troubleshooting](#) on the Zotero website.

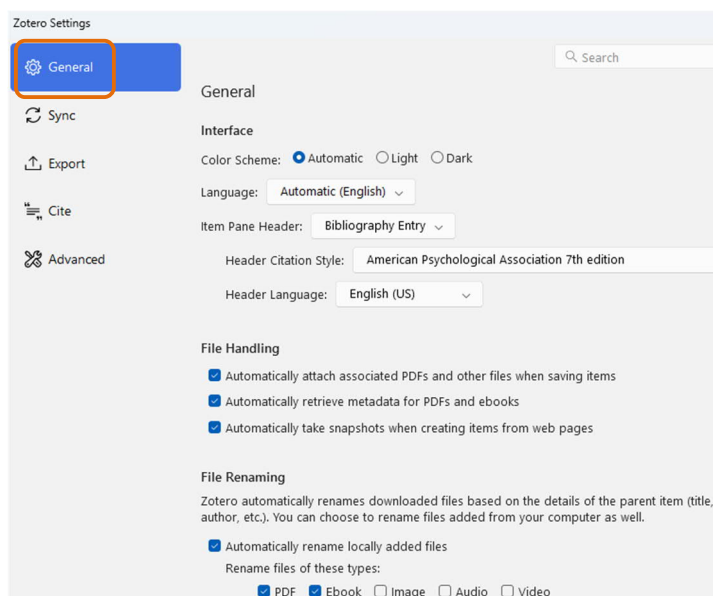


To use Google Docs with Zotero, you must have downloaded the Zotero program and the connector to the browser you use to access Google Docs. Using Zotero for the first time in a document will prompt you to authenticate the plugin with your Google account. You can then begin inserting citations from your Zotero libraries just as you can with Word.

3. Configure general preferences

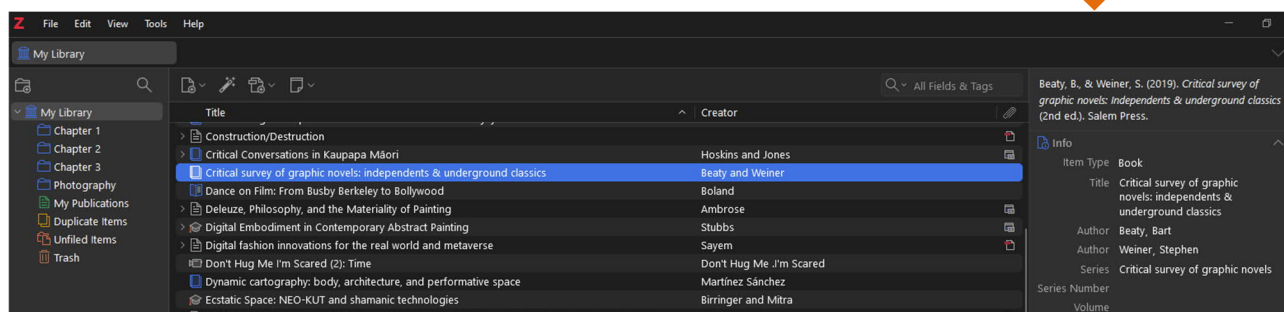
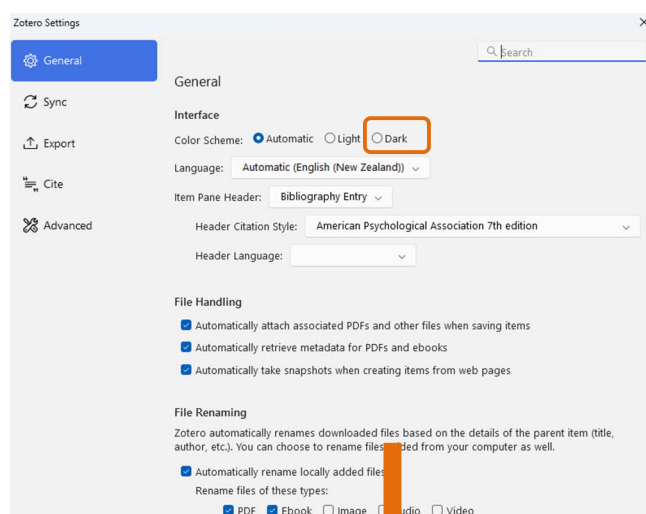
In the General tab uncheck, if applicable, the following boxes under Miscellaneous:

- If you do not want PDFs to be automatically downloaded into Zotero, uncheck the box next to Automatically attach associated PDFs and other files when saving items. If you leave this option checked, go back to the Sync tab and uncheck the File Syncing of attachments options. This will stop full-text PDFs attaching to your online Zotero account (which has a 300MB limit), but not in the Library on your own device.
- It is recommended you uncheck Automatically tag items with keywords and subject headings to prevent Zotero from automatically importing subject headings from databases.



4. Dark mode

Zotero 7 offers the option to set your interface to 'Dark' mode. To enable this go to Edit, select Settings, and under the General tab select the 'Dark' option.

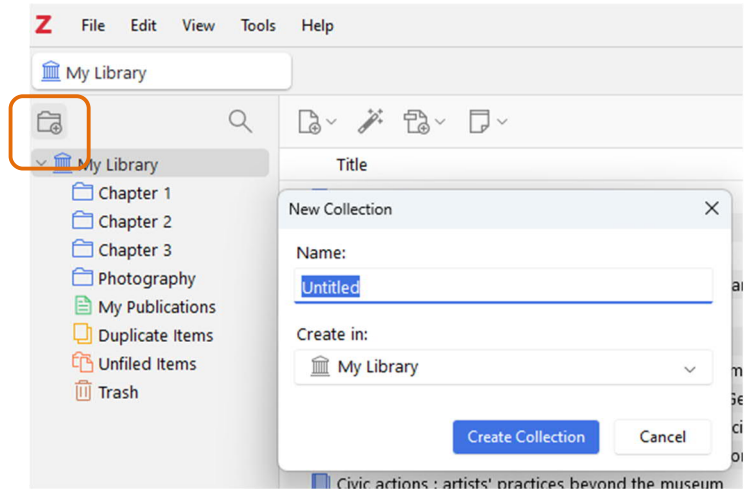


Adding Items to your Zotero Library

Create Collections

Everything added to your Zotero Library appears in 'My Library' but you can also duplicate items into any number of folders (termed 'Collections') and sub-collections. Create a new collection by clicking the folder icon above the 'My Library' pane. (Create a sub-collection by right clicking on an existing collection and selecting New Sub-collection.)

When a collection is open any items you save will automatically be filed into that folder as well as automatically added to My Library.

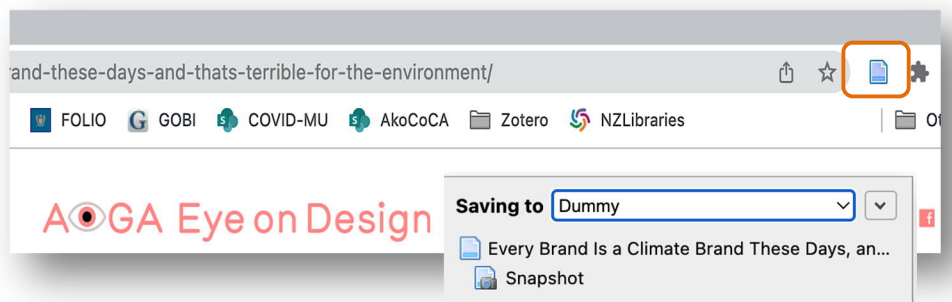


Saving Web Pages

Zotero can recognize descriptive information ('metadata') from many different forms of web pages.

To save a web page just click on the source icon to the right of the address bar.

The appearance of the icon will change for different sources (webpage, newspaper, book etc). The metadata and a snapshot of the page will be saved to Zotero.



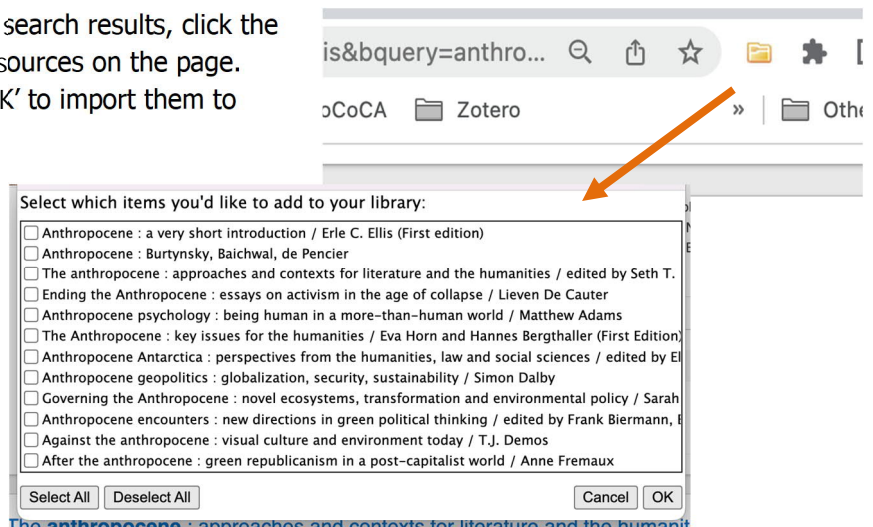
Saving Sources from Library Databases

You can import reference data for sources from most Library databases into Zotero including *Discover* and other EBSCO databases.

To save individual sources click on the book or article title to open the full record, then on the source icon to the right of the address bar (as for a Web page).



To save multiple items from a list of search results, click the folder icon. This will generate a list of sources on the page. Check the ones of interest and then 'OK' to import them to Zotero



Note: if there is no Zotero icon visible on the address bar you may still be able to use the export tool provided by a database. Zotero supports export from *BibTex*, *RIS*, *Dublin Core RDF* and other formats.

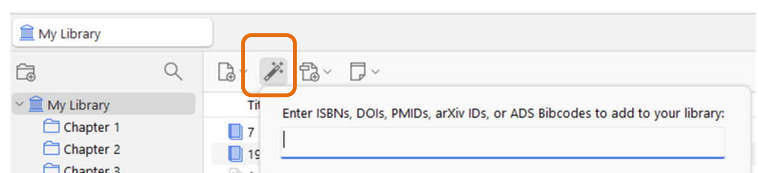
Google Scholar

Exporting items from Google Scholar is essentially the same as other databases. To save individual items simply open the source from the results then save it using the icon on the address bar.

To save multiple items from a search result, click the folder icon to generate a list of sources on the page, then check ones you want to save [as above].

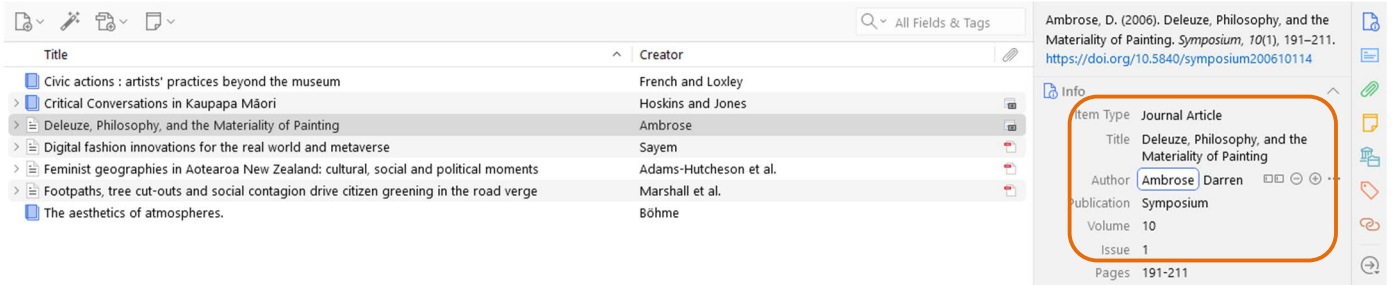
Add Items by Identifier

You can also use Zotero's built-in 'identifier' tool to import sources. Click the 'magic wand' icon on the menu bar above the main library to activate. Enter identifiers such as ISBNs, DOIs, and PubMed IDs. Zotero will search for the metadata and, if available, use it to create a record.



Check Citations for Accuracy

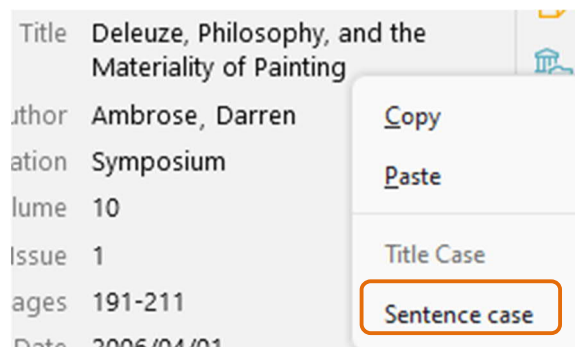
Although most of the reference information in Zotero records will be fine, you'll need to check every item's data as some of it may not be accurate. Metadata from the original source can go into unexpected fields or may need editing. Click any field to edit the information in it.



Check whether your reference is displaying correctly for your chosen style using the preview at the top of the 'Info' pane.

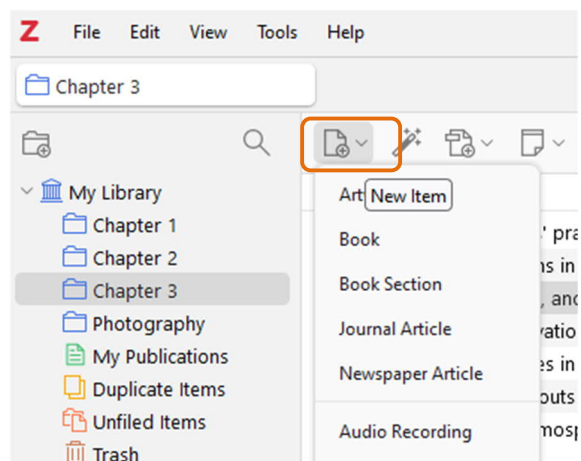
Note that Zotero's output for APA style does not automatically change 'title' case to 'sentence' case as APA requires.

To change titles that are not in sentence case for APA or other styles, right-click on the title and select Sentence case.



Manual Entry of Sources

If you can't automatically save or export items from a website you can create a manual entry. Use the drop-down menu attached to the *New Item* button to choose the type of source you want to enter e.g. Journal article, Blog post, Book section [Zotero's term for a chapter] etc.



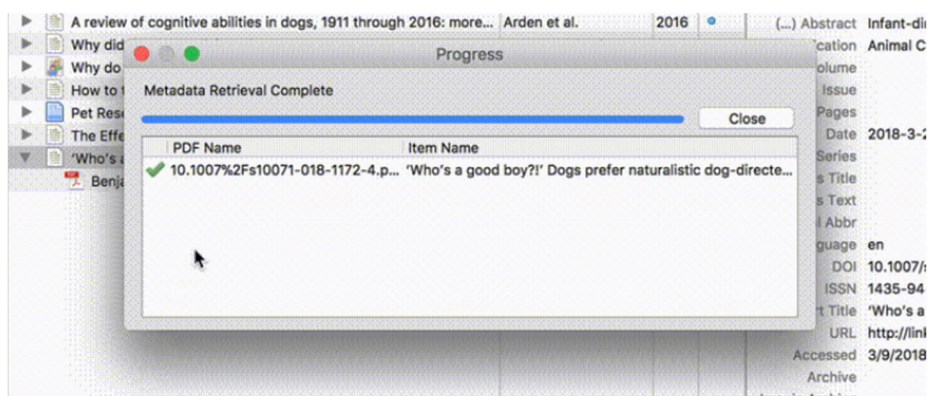
Info	Notes	Tags	Related
Item Type: Book Section			
Title:			
▼ Author: (last), (first)			
Abstract:			
Book Title:			
Series:			
Series Number:			
Volume:			
# of Volumes:			
Edition:			
Place:			
Publisher:			
Date:			
Pages:			

This will open a form in the right-hand pane. Enter the details you have about your source in the relevant fields. You don't have to complete all fields, just those needed for your citation style for the item/source type. Use the [OWLL website](#) to check the requirements for your chosen style.

Saving & Working with PDFs

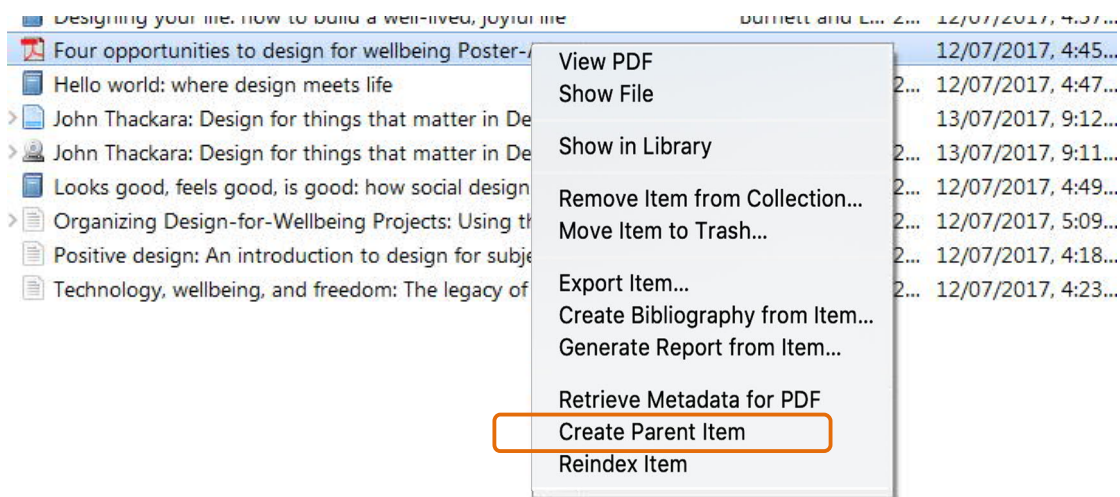
If selected in the *Preferences* Zotero will automatically download a full-text PDF of a source when adding the reference to the library (if one is available).

Any PDFs already stored elsewhere on your device can be saved to Zotero by dragging and dropping them into 'My Library' (or any of your collections) on the left-hand side of the screen. Zotero will automatically search for metadata; if found it will then create the record and attach the PDF.

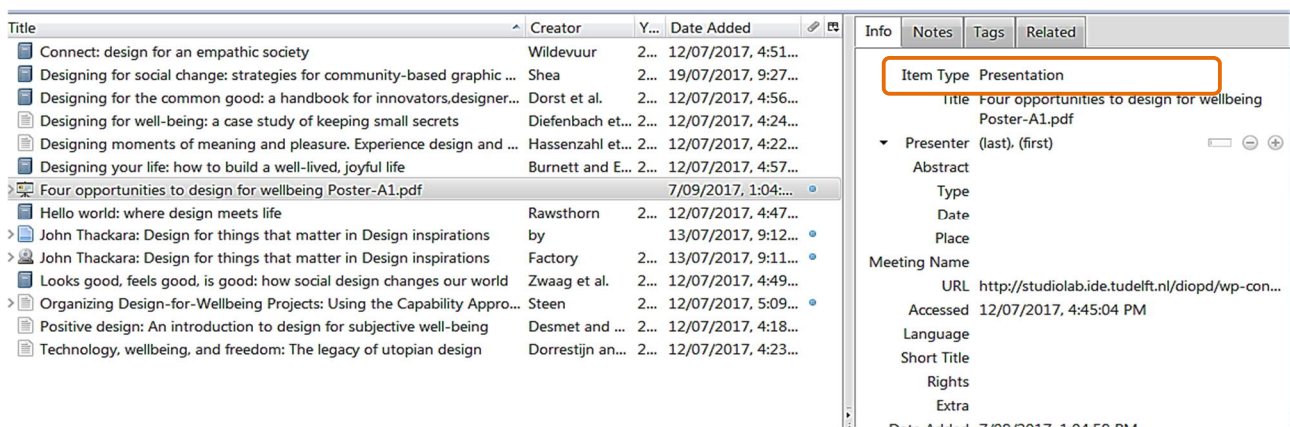


NOTE: to prevent hitting the storage limit of your free online Zotero account, go to *Preferences* > *Sync* tab and uncheck *Sync full-text content* [see p.4].

If retrieving metadata doesn't work, you'll need to manually add the information to the item. Right click and choose Create Parent Item:

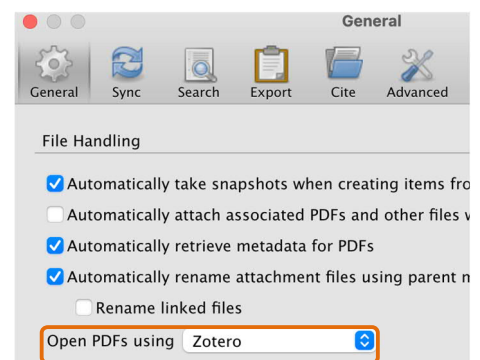


Now, you can fill in the information for the item manually. Make sure you change the Item type to the correct entry as this controls how the citation is formatted.



Remember to check that the information attached to any PDFs you import is accurate [see p.7].

Zotero 7.0 includes a PDF Reader that allows you to open [in a tabbed interface], read, annotate and add metadata to any stored PDF. To activate this you will need to choose to open them within Zotero – go to *Preferences* > *General*.

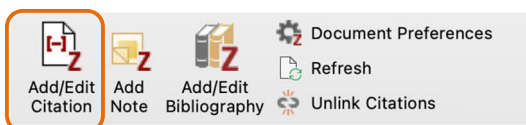


Creating Citations & Bibliographies from Zotero

The following refers to working with *MS Word* docs (Mac or Windows); *Libre Office* works similarly. Zotero also offers *Google Docs* integration [see p.12].

Inserting Citations in Word Documents

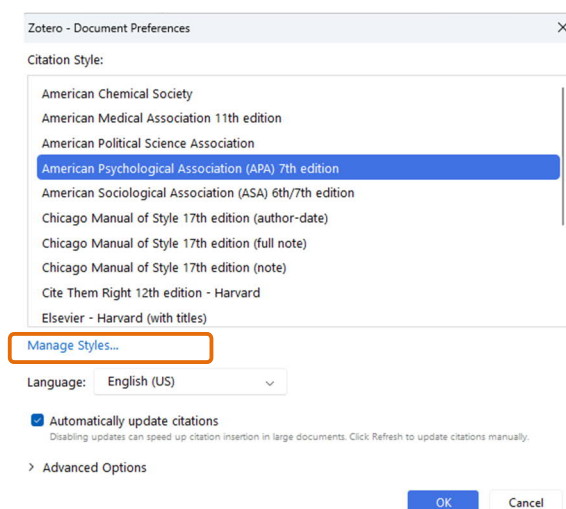
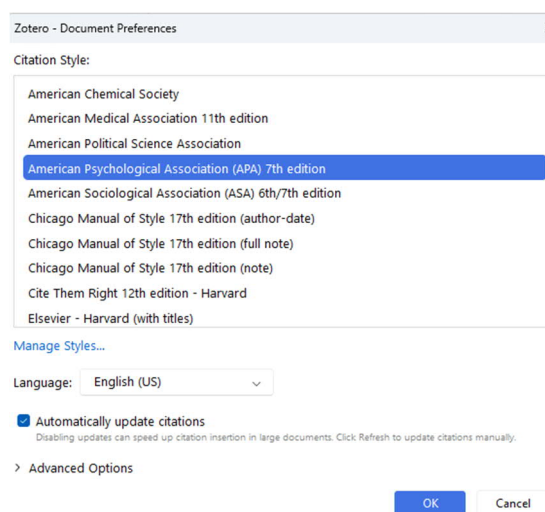
Note: if the Zotero tab is not showing in Word then go to the [Zotero site documentation](#) for guidance.



Ensure your Zotero Library is open. In your Word document, place your cursor where you'd like to add a citation in the text and click Add/Edit Citation in the Zotero toolbar

Select a Citation Style

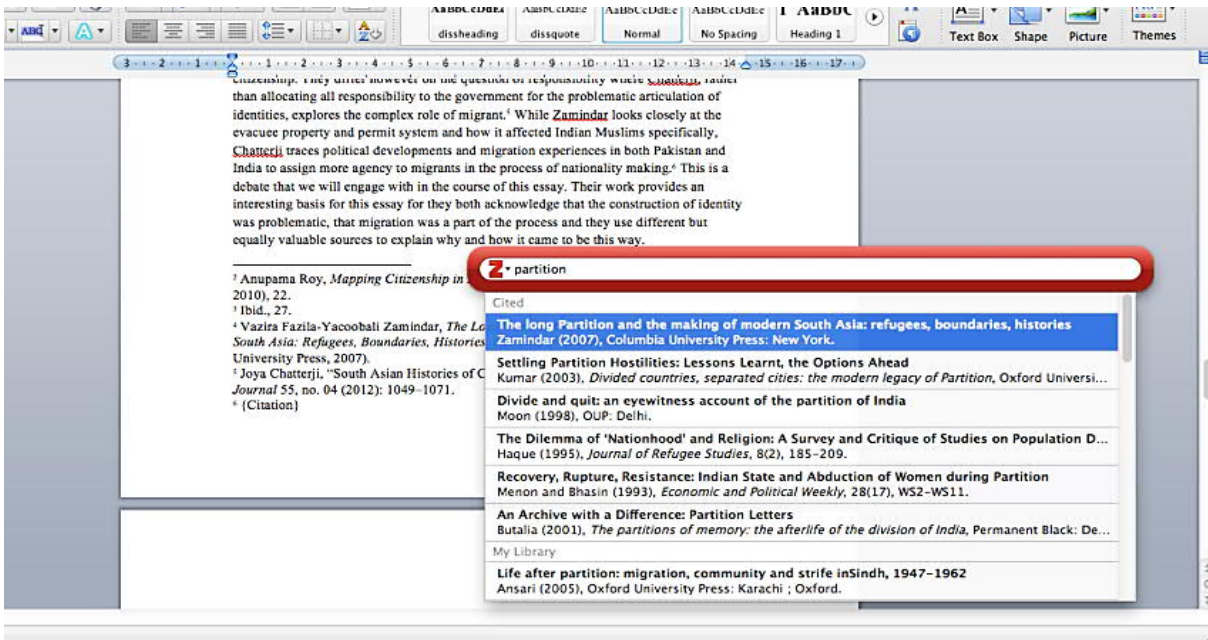
The first time you insert a citation in a new document you will be required to choose a citation style. Commonly at Massey this will be APA 7th edition or MLA 9th edition.



Note: if you do not see the style you want listed, you'll need to click on Manage Styles then click on Get additional Styles...

Find the style you want and click on the title. Click on Install. This style will now be listed when you go back into Word to insert the first citation.

Once the style is selected a red Zotero search bar will open. Type key words from the source title or author you want to insert - a list of options will appear. Select the desired item and press Enter twice.



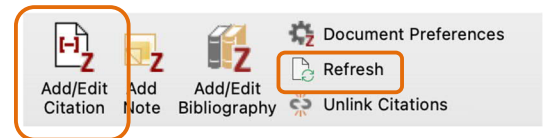
Inserting Multiple Citations

After selecting the first item, don't press enter, but type the key word for the next one, select from the listing and the next will appear.



Editing Citations

Any errors that appear in in-text citations MUST be corrected in Zotero, *not* in Word. Once you've made corrections in Zotero, click the Zotero Refresh button on the toolbar to update your document.



Always use the Add/Edit Citation button in the Zotero toolbar if you are making changes like those following.

To edit an in-text cite, highlight the citation, then click Add/Edit Citation on the toolbar. Place your cursor inside the blue highlighted citation and an editing box will pop up:



Add or edit page numbers, prefixes or suffixes, or omit an author (as required), then press enter twice.

To delete a citation, highlight/select the citation (all the greyed area), click delete, then click the Zotero Refresh button.

Creating References and Bibliographies

You can create a Bibliography/References list at any time once you've added a few citations. Position your cursor at the end of the doc then click Add/Edit Bibliography. Zotero will insert a fully formatted and alphabetized bibliography in whatever style you have previously chosen. All in-text cites subsequently inserted will automatically generate a reference in the bibliography in alphabetical order.



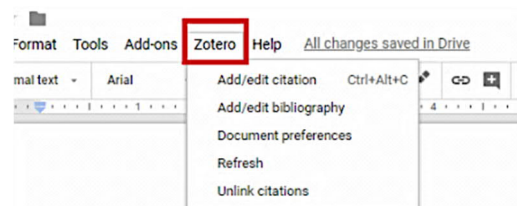
Once you've created a bibliography, click the Add/Edit Bibliography button again to open a window where you can select and add additional items to the bibliography that you haven't cited in-text, or remove cited items from the bibliography.

Zotero will also integrate with writing tools such as *Scrivener* or *Overleaf* - though with more limited functionality than Word. See the [Princeton University Library](#) guide.

Using Zotero with Google Docs

In brief. For fuller detail see [Using Zotero with Google Docs](#).

When you open a Google Doc in a browser with a Zotero connector installed, you'll see a Zotero tab added:



To add a citation to your document, select "Add/edit citation" from the menu or click on the Z button in the Google Docs toolbar (far right). Choose your citation style when prompted and then add citations and create bibliographies as described for MS Word [above]. Note that there are some limitations:

- Citation inserts and edits slow down significantly as the number of citations in the doc increases – you may want to disable automatic citation updates in the Zotero document preferences.
- You can't copy + paste Zotero citations between documents; copying citations within a document is OK.
- Text formatting related to citations may be limited.
- If someone views the document without the Zotero Connector installed, or if you download the document without first making a copy and unlinking citations, active citations in the document will show as links such as <https://www.zotero.org/google-docs/?abc123>.

Quick Copy

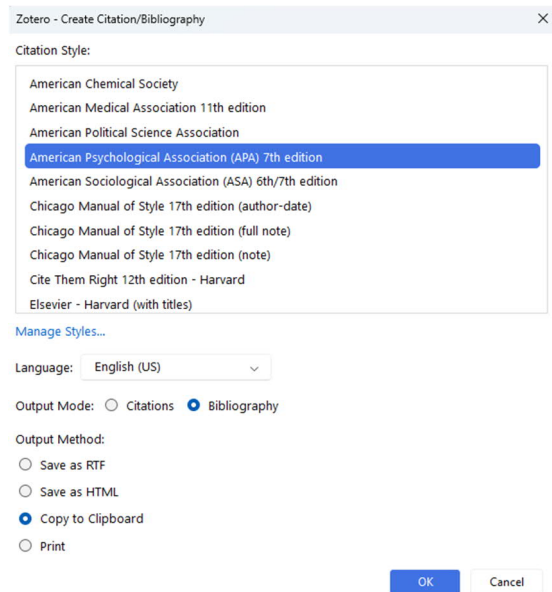
To quickly add a full reference citation to a document or email, select items in the centre column of your Zotero library and drag them into the desired text area - Zotero will automatically create a formatted reference.

To copy an in-text citation instead of a reference, hold down the Shift key and drag.

Fuller Bibliography or Citation List

Highlight the required references in your Zotero library and then right-click (ctrl-click on Macs) to select Create Bibliography from Selected Item(s).... Select a citation style for your citation/bibliography format and choose to either create a list of Citations or a Bibliography. Then choose one of the following four ways to create your citation/bibliography:

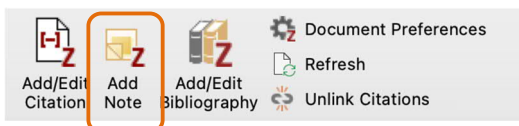
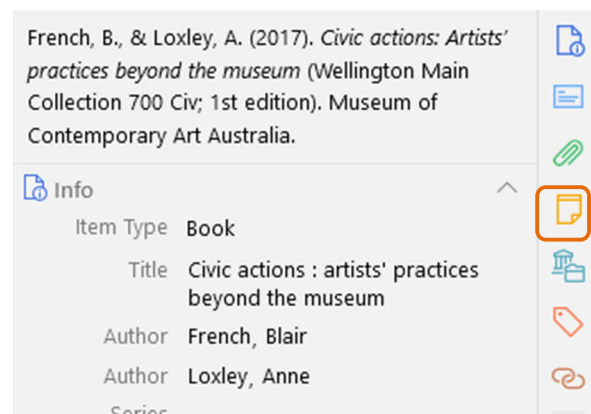
- Save as RTF to save the bibliography as a rich text file.
- Save as HTML to save the bibliography as an HTML file for viewing in a web browser (will also embed metadata).
- Copy to Clipboard to save the bibliography to your clipboard then paste into any document.
- Print to send your bibliography straight to a printer [if enabled on your device].



Working with Notes

Zotero includes a Notes function that allows you to add comments on sources. These are inserted under the Notes tab to the right of the main *Info* tab.

Features include a range of basic editing tools and a link inserter.



In a Word doc click on the Add Note button to select from a list of notes you want to add. The text of that note will then be inserted along with the associated citation.

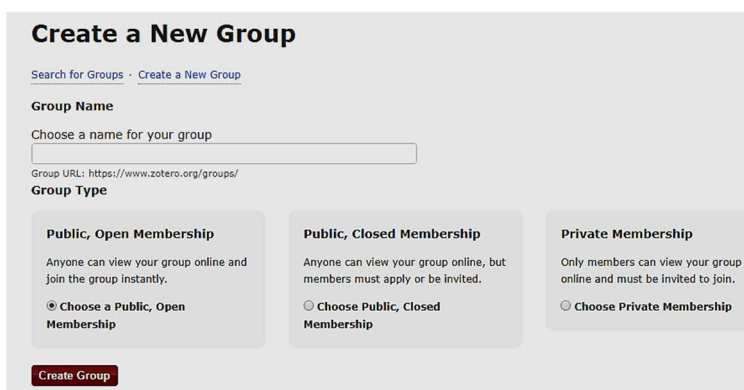
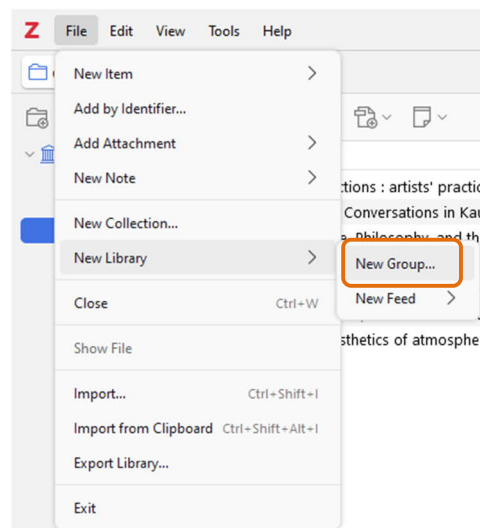
Version 7.0 also allows you to embed images in the Notes area. Simply drag the image into the Notes field and annotate it with a caption or context. To insert into a document, click *Add Note*, select the appropriate note and enter. You will probably need to edit the image with Word's *Picture Format* tools

Group Libraries

Project collaborators are able to set up group libraries in Zotero in order to share sources. Members of the group need an individual Zotero account as access to the group library is through the Zotero 'cloud', and there must be sufficient storage space to host group sources. If you intend to store full-text PDFs of the sources (not just the references) you may need to purchase additional storage space. To continue with the 'free' service you will have to limit the group references to 300MB - file storage always draws from the storage account of the group owner. [For an institutional 'lab' group there would be an annual subscription cost, see [Zotero Storage](#).]

Setting up Groups

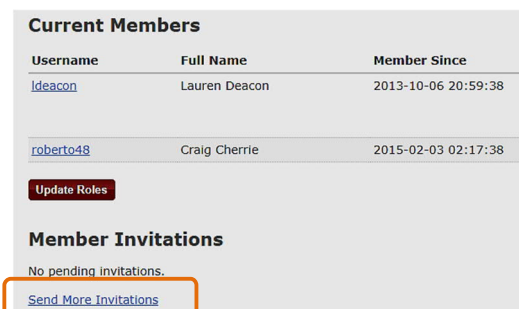
Go to the upper left-hand corner of the Zotero tool bar and click on File, select New Library, then New Group. This will take you to the Zotero website for new groups. If not already logged into your Zotero account, you'll be prompted to.



On the *Create a New Group* page enter your Group Name then select the Group Type. If you want to invite only known people choose *Private membership*. Click the Create Group button.

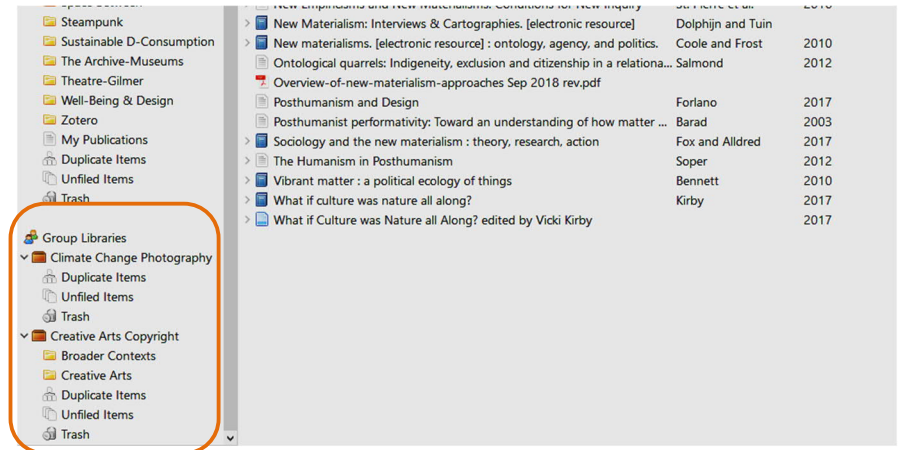
Review the permissions for each member.

To invite other members click in Member Settings then the *Send More Invitations* link. (Best to send a personal email to invitees to let them know - it may end up in a spam folder). When invited members click on the link in the email they'll be added to the group.



Once members are in your group you can also configure their roles – Admin, Member, or remove them.

To add items, return to your Zotero library on your own device. Your Zotero account will need to be synced before you'll see your group folder as your group library is stored in the Zotero 'cloud' so group members can access it from their respective devices. Group folders are listed below your personal folders in the left-hand pane.



Add items to your group library in the same way as your personal collections; click on a group folder, then do a search to add some new citations using the Zotero icon in the URL bar. Alternatively, you can drag and drop items from other folders into your group folders.

Please note: Article database licence agreements generally do not allow sharing of PDFs with anyone not affiliated with Massey University.

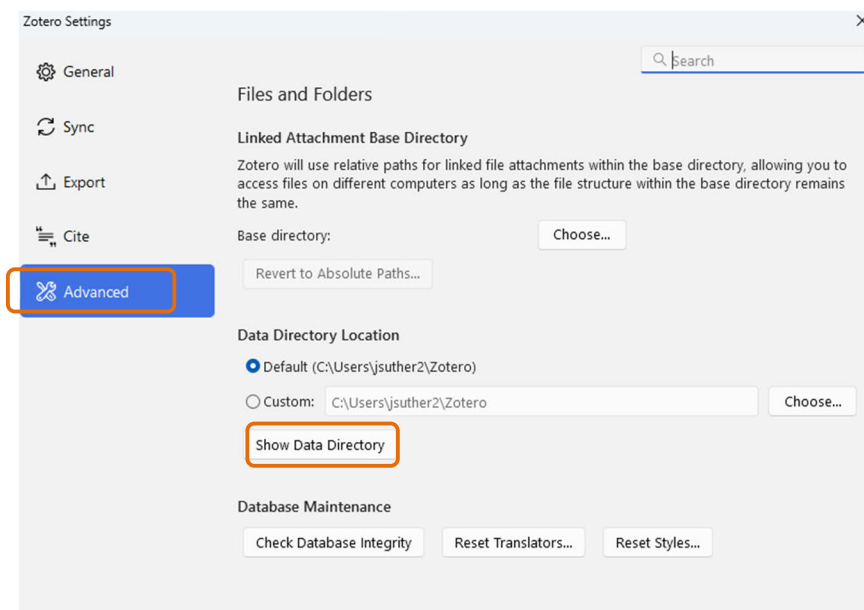
Backing Up your Zotero Library

If your data is substantial and vital it is important to back up your Zotero library regularly - 'syncing' is not always totally fool-proof and the Zotero cloud server stores only the most recent version of your library.

Copy your Zotero Directory

Note: before you copy or move any Zotero files be sure to close your Zotero library. Failure to do so could corrupt the data.

Open Zotero and go to Edit, then Settings, then Advanced, then scroll down and click Show Data Directory .



The Zotero directory on your computer will show.

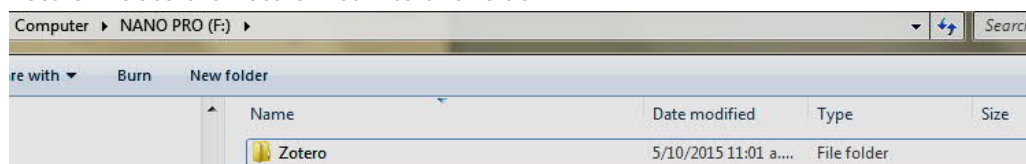
Close your Zotero library then highlight all files on the Zotero directory box (copy the entire directory, including storage and the other subdirectories).

Now right click to Copy these files and Paste files to the backup repository.

For fuller detail see [Backing up your Zotero Data](#).

Save your Zotero directory to an External Device

Go to your backup location (e.g. a USB drive or recognised device), create a New folder and name it as *Zotero*. Paste the Zotero files into this folder.



Be sure to include a date in the name of the saved Zotero backup folder e.g. Zotero 5 Oct 2024.

Further Guidance

Look at the Zotero website *Documentation* sections: <https://www.zotero.org/support/start>

or email library@massey.ac.nz