Abstract:
Zotero allows you to capture references from sources you want to include and cite in your papers. The Zotero notes and PDF features allow you to include your own research notes about a reference in your library and attach the PDF of the article for quick and convenient access. When you are ready to write your paper, Zotero has a Word plug-in that allows you to choose from numerous formats for one-click in-text citations and bibliographies. This document covers the basics of using the citation software Zotero, including building libraries, citing references and building bibliographies.
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Getting Started

Installing Zotero for Firefox, Safari or Chrome

Installing Zotero as a Firefox application will provide you with the original, most reliable and most accurate version of the program. This installation only works in Firefox, however. If you prefer to use Chrome or Safari as your browser, you can install the Zotero Standalone version, which installs directly to your hard drive rather than as a browser application. For all of these installations, you will first install Zotero and then will come back to install either the Word plugin (for Firefox installations) or the browser extension (for Chrome or Safari). In any case, however, the installation is a two-step process. Although its functioning is nearly identical across platforms, Zotero can appear a little different in different computer environments. Instructions and screenshots for these three installation options are included below.

Installing Zotero as a Firefox Application (recommended)

You will need two Zotero plugins: one for Firefox and one for Word.

1. Begin by downloading Zotero for Firefox at: https://www.zotero.org/download/. Click the red Download Now box and choose Looking for Zotero 4.0?
3. You will be prompted to choose a version of 4.0. Select *Zotero for Firefox*.

4. You will then be provided with several simple prompts as the installation progresses. When the installation is complete, you will be automatically re-directed to Zotero’s *Success!* page (https://www.zotero.org/start). You should also see the addition of Zotero tools in your Firefox toolbar.

In *Firefox*, the Zotero tools icons icon should be visible in the upper right-hand corner. The “Z” icon acts as an on and off switch for Zotero, which will appear at the bottom of your screen when activated. The middle icon, which appears here as a white and gray rectangle, represents the type of information Zotero sees that can be imported to its library (in this case, it sees a web page.) If you do not see the Zotero icons after you install, try closing and re-starting Firefox.

5. Next, you will need to return to the download page to get the Word plugin. Go to https://www.zotero.org/download/ and select *Looking for Zotero 4.0?* (see image under Step 1)

6. Choose *Word Processor plugins*. 
8. Click the appropriate link, depending on your operating system (e.g. Windows, Mac) and word processor of choice (e.g. Word).

Microsoft Word

Windows
The latest version of the Word for Windows plugin for Zotero 3.0+ is 3.5.6 (compatible with Word 2003-2016, excluding Word 2010 Starter Edition).

* Install [Word for Windows Plugin 3.5.6](#) (Firefox extension)

Mac
The latest version of the Mac Word plugin for Zotero 3.0+ is 3.5.14 (compatible with Word 2004-2016 and Firefox 4 or later).

* Install [Word for Mac Plugin 3.5.14](#) (Firefox extension)

Word 2008 users: Zotero functionality is located under the Word script menu. See [here](#) for more details.

9. Finally, see page 7 to locate your Zotero tools in Word.
Alternative 1: Installing Zotero for Safari

You will need to download and install Zotero then return to install the Safari browser extension. This will install the Zotero program in your computer’s hard drive (rather than in your Firefox browser) but will also create an extension icon within Safari for collecting citation information.

1. Begin by downloading Zotero for Firefox at: https://www.zotero.org/download/. Click the red Download Now box and choose Looking for Zotero 4.0?

2. Under Zotero Standalone 4.0, select Mac

3. Click the Downloads arrow in the upper boxes on your screen and then double-click on the Zotero file to begin the installation process.

4. Drag the Zotero icon into the Applications folder.
5. When this process completes, Zotero will be located in your applications folder. Double-click to open it. You can also permanently add it to your dock by right-clicking the Zotero icon in your dock, hovering over **Options** and selecting **Keep in Dock**.

6. Return to: [https://www.zotero.org/download/](https://www.zotero.org/download/). Click the red **Download Now** box and choose **Install Safari Connector**.
   NOTE: if this does not appear, choose **Zotero Connectors for other Browsers** (below)

   ![Zotero 5.0 for Windows and Zotero Connector](image)
   From the drop-down list, choose **Safari**; then follow the simple installation process

7. When the process is complete, you should see the Zotero icon to the left of Safari’s URL bar.

   ![Safari connector](image)

8. Finally, see page 7 to locate your Zotero tools in Word.
Alternative 2: Installing Zotero for Chrome

You will need to download and install Zotero then return to install the Chrome browser extension. This will install the Zotero program in your computer’s hard drive (rather than in your Firefox browser) but will also create an extension icon within Chrome for collecting citation information.

1. Begin by downloading Zotero for Firefox at: https://www.zotero.org/download/. Click the red Download Now box and choose Looking for Zotero 4.0?

2. You will be prompted to choose a version of 4.0. Select either Mac or Windows (depending) on the computer that you are using.
3. The Zotero download icon will appear at the bottom, left-hand corner of your browser window. Click the arrow to open the drop-down menu then select **Open**.

4. In the next box, Windows users will select **Run** to begin the installation process. Mac users will drag the Zotero icon into the applications folder.

5. When this process completes, Zotero will be located in your Applications folder (Mac) or Start menu (PC). Double-click to open it.

7. Return to: [https://www.zotero.org/download/](https://www.zotero.org/download/). Click the red **Download Now** box and choose **Zotero Connector**; follow the simple installation instructions that appear on screen.

8. When the process is complete, you should see the Zotero icon on the far right of the Chrome URL bar.

9. Finally, see page 7 to locate your Zotero tools in Word.
Where’s Zotero in Word?

Zotero in Word 2016, PC

If you don’t see your Zotero tools in Word, try closing Word and re-opening. If there are still no tools, close Word and reinstall the Word plug-in from Zotero.org.

Zotero in Word 2016, Mac

In Word for Mac, the Zotero toolbar should appear in the upper left corner of the Word window. (Mac users may need to set up the Zotero toolbar by clicking Tools → Templates and Add-Ins... → Zotero.dot → Add... → OK). Then click View → Toolbars → Zotero Bibliographic Management

Zotero in Word 2013, PC

Zotero in Word 2011, Mac

Zotero in Word 2010, PC
The Zotero Library

Clicking the Zotero icon in the upper, right-hand corner of your Firefox browser screen will open the Zotero library. The library has three main panes. The left pane provides a view of the file system where you can group library resources into shared folders. The middle pane provides a list of the resources contained in the library or selected folder. The right pane provides a preview of the bibliographic information associated with each resource.

![Zotero Library Screenshot](image)

Toolbar Functions

Hover over any of Zotero’s toolbar icons to reveal its function. In the Zotero for Firefox library, the toolbar functions are, from left to right: New Collection, New Group, Actions, New Item, Add Item by Identifier, New Note, Add Attachment, Advanced Search, Search Bar (and Go button), Zotero Server Sync, Toggle Tab Mode and X for Exit.
**Preliminary Settings for Zotero**

You may want to set Zotero to:

**Download Associated PDF Files with Citation Information**

1. Click the Gear (Actions) icon then choose Preferences from the drop-down menu.
2. In the General tab, make sure the box that reads *Automatically attach associated PDFs and other files when saving items* is enabled, then click OK.

**Use the “Classic Style” citation dialog**

While technically not a “bug,” Zotero does not handle multiple windows very well and often times, the system will appear to “hang” when in fact a pop-up window is waiting for input from you but is hidden under the other layers of your desktop. One of the major offenders, it seems, is the pop-up citation dialog box in Word. Using the Classic Style citation dialog box appears to prevent this frustration and also offers a broader range of citation options. To set Zotero to automatically use the Classic Style citation dialog:

1. Click on the Gear (Actions) icon, then select Preferences from the drop-down menu.
2. Select the Cite tab then the Word Processors sub-tab.
3. Check the box labeled *Use classic Add Citation dialog*, then click OK (in PC) or exit using the red circle (in Mac).

**Refrain from automatically importing tags and keywords associated with citations**

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 it off in advance:

1. Click on the Gear (Actions) icon, then select Preferences from the drop-down menu.
2. Select the General tab
3. Uncheck the box labeled *Automatically tag items with keywords and subject headings.*
Building the Zotero Library
To start building your library after installing Zotero on your browser, simply begin looking on the internet or through KU Library electronic resources for items of interest. To add items to your library, simply click the Zotero download icon. Some examples are included below.

Getting Citations for Books, Articles, Web Pages and even YouTube videos
Zotero will collect citations from websites, library databases and many other sources. Google Scholar is used as an example. Using Google Scholar while logged into the library will help expand the range of your search and will make more electronic texts available to you.

1. First, from the KU Libraries home page (www.lib.ku.edu) click G under Databases A-Z to then scroll through the Gs to locate and open Google Scholar.

2. Now conduct your Google Scholar search as usual.

3. Using Zotero will allow you to pull multiple citations from Google Scholar simultaneously or individually.

   a. To select from all references that are listed on your first search results page, click the yellow folder icon that appears in the upper right-hand corner of the screen. Check the items you want from this page, then click OK.
b. To collect citations individually, click on the title of the article then the article icon that appears in the URL bar.

Using either approach, you will see a message from Zotero that it is saving the citation in your library. The citations will also appear in the middle pane of the Zotero library.

As you sift through electronic sources, Zotero lets you know whether there are single or multiple citations available for download by displaying a yellow folder when multiple citations are available. Keep an eye on the right-hand pane as you download information and ensure that all the citation information you will need has been collected. If anything is missing, add it manually while you still have the source readily available online.

**Zotero will attempt to download PDF files as well**
This is most successful, though, when downloading citations individually rather than in multiple batches. For the best chance of bringing in a PDF, navigate all the way to the page that contains the “Download PDF” link. Sometimes it will get the PDF, and you will see it listed as a “child” item of the citation by clicking on the expansion triangle to the left of the citation title.

Other times you will need to download the PDF to your hard drive and attach it to Zotero by hand.

*If clicking the triangle to the left of the article title does not show an attached PDF (or if there is no triangle to the left of the article title at all):*

1. Download the article from the database as you normally would.
2. Click once on the article citation (middle pane) in your Zotero library.
3. **Right-click** (or Control+Click for Mac users), hover over Add Attachment then click **Attach Stored Copy of File**.
4. Next, simply navigate to the downloaded PDF and attach it like you would attach a file to an e-mail.

*From here, you can open it from your Zotero library. To use annotation tools, such as highlighting and sticky note features, click on the PDF in your Zotero library, then right-click and select **Open in External Viewer**. Highlight and annotate as you choose, then click **Save** and accept the suggested file name and file path to over-write the original file in your Zotero library.*
**Adding an Item by Identifier**
To add an item (a book, journal article, government document, etc.) by its identifier (ISBN, DOI or PMID):

1. Click the **Add Item by Identifier** icon.
2. Enter or copy and paste the object identifier in the text box or, if you have a scanner, scan in the barcode.
3. Click **OK**.
4. The item should appear in your citations listing in Zotero.

**Adding a Reference Manually**
What if you need to include an item in your library for which online citation information is unavailable, such as an unpublished manuscript, interview transcript, survey instrument or data set?

1. Click the **New Item** drop-down menu (a green circle with a plus sign) and select the type of reference you want to add.
2. Zotero opens a blank reference in the right-hand pane. Click in each field of the **Info** tab to fill in the necessary information. Notice in the Author field that users can toggle back and forth between an individual name (with two fields, one for first name and one for last name) and institutional authors, (with one field for a full name—for example, “United States Census Bureau”). Providing additional information in the **Notes**, **Tags** or **Related** tabs is optional.
**An Alternative Route: Building a Library from Stored PDF Files**

You can import single PDFs or groups of PDF files stored on your computer to your Zotero library. Drag them in and Zotero will scan for the article then attach the citation information you will need for your bibliography. It then creates a full reference including the citation information with the PDF file attached. It often does not find all of the articles you may want to add, but it can save you some time if you have lots of PDF files to add to your Zotero library.

1. From your Documents folder, and with Zotero open below, use Control + Click (Command+Click on Mac) to select the files you wish to add to your Zotero library.
2. Drag the files into your Zotero library.

Be careful not to drop the folder into an item that is already present. This will turn it into a subfolder. Instead, look for the small blue (PC) or gray (Mac) line to appear between library entries rather than a fully highlighted entry.

3. Next, click on the article you have just added, then right-click (or Control-click on Mac) to reveal the options for the article.
4. From this box of options, click **Retrieve Metadata for PDFs**.
5. If this is your first time using the **Retrieve Metadata** function, you will be prompted to install additional Zotero tools. Follow the...
prompts. The installation of these tools is very quick. When the installation finishes, again right-click on the item and choose **Retrieve Metadata for PDF**.

![Metadata Retrieval Complete](image1)

In the box above, both items have been located, as indicated by the green checkmark. A red X would appear here instead if the metadata had not been found.

In the screenshot below, notice the addition of the article’s bibliographic information under the **Info** tab on the right. Glance quickly here to ensure that the information is correct and complete. Click in any field to add or change information.

![Article's Bibliographic Information](image2)

**What if Zotero doesn’t find citation information for the PDF?**

1. To manually add citation information to an imported PDF, click the green **New Item** icon and designate a type of entry to add.
2. Zotero will open a blank entry for you. To begin adding information, double-click on the PDF to open a preview of the article in your browser window. This will make it easy to type in information without having to switch screens.
3. When you have finished adding the citation information, simply drag the PDF up to the new entry and drop it there. Zotero will add it as a “child” of your new citation (see below).
**Sorting Resources**

You can choose how much information to show about each item and also toggle the sorting (high to low, low to high) by clicking on the small box icon at the top-right of the middle pane. In the image to the right, clicking on this icon opens a list of possible columns to include in the middle pane. Here, the **Date Added** category has been added to Zotero’s default sorting options. Toggling the arrow in the Date Added column heading box will rearrange the column.

**Creating a File System for the Zotero Library**

1. Click on the **New Collection** file folder icon in the upper left corner of the Zotero library.
2. In the pop-up **New Collection** box, enter a name for the new folder and click **OK**.
3. The new folder will appear in the file system (left pane) of your Zotero library.
4. Click on **My Library** to view all your references, then drag and drop selected references into the new folder. A copy will remain in the My Library folder as well.
5. To create a subfolder, simply make another folder then drag it into the folder that you would like to serve as the parent.
Working with Tags in Zotero

Zotero allows you to assign keyword tags, to assign color to up to six of these tags (per library) and to quickly access all articles with a given tag. Before you begin, however, you may want to prevent Zotero from downloading tags from outside sources. You can turn this function off by clicking the gray gear icon in your Zotero menu. Next, choose Preferences and in the General tab, uncheck the box that reads Automatically tag items with keywords and subject headings, then click OK.

1. Begin by clicking on the Tags tab for a citation in your Zotero library, then click Add.

2. Type in a name for your tag. If the tag is already in the system, it will pop up as you type. To remove a tag from an item, click the minus icon on the right-hand side of the tag listing.

3. The tag cloud is located on the left-hand Zotero pane and when closed, it appears as a small dotted line across the bottom of the pane with upward arrows on either side. Click here to open the tag cloud. (If you don’t see the dotted line, hover at the very top of your Zotero library and drag to enlarge it. The dotted line should appear.)

4. To add a color, hover over the tag in the tag cloud then right-click (Control-click in Mac) and choose Assign Color.

5. Click on the Color box to assign a color and click Set Color. The Color box will not change when you apply a new color.

6. Once a color is assigned, you can also assign a position by re-opening the Assign Color box and selecting a number from the Position box. (Assigning a position will enable one-click tagging by allowing you to click once in the inventory pane then type the number associated with the tag.)

7. In your library, you will notice a box to the right of the title that displays the tag color.
8. You can now apply the same tag to other items simply by clicking once on the item then typing the Position number (1 in this case).

9. You can also click on the tag in the tag cloud to see all items that contain that tag. All items do not have to contain colors to appear.

10. To delete a tag, right-click on it and then choose Delete Tag... from the pop-up menu of options.
Managing Duplicate References

1. Begin by clicking **Duplicate Items** under the **My Library** folder in your Zotero library.
2. Zotero will show all items with duplicate copies. Depending on how your library is sorted, these may or may not appear consecutively in a list. In the illustration below, the articles appear in alphabetical order by title, but if the library was sorted by date, they would be less likely to appear together.

3. Use the drop-down options to the right of each field to select the content for that field for the reference that will remain in your Zotero library.

   *The screenshot to the right shows the location and appearance of these drop-down controls. There are four of these shown here, indicating that across these several duplicates, Zotero found more than one possibility for each field. Here, it is asking you to choose the one you want.*

   *The lower screenshot shows a close-up of the Abstract field while the drop-down is active. Notice that for this example, there are two possible choices for the Abstract field. The first, which is highlighted and labeled “1,” is to leave this field blank. The absence of any text in the Abstract field indicates that this is the current setting for this field. Zotero has also located a duplicate of the item that does contain text in the Abstract field. That option is shown here as the second field, labeled “2.” Click on the field you plan to keep.*

4. Repeat for all the drop-down items.
5. When finished, click **Merge (#) items** at the top of the box. The item will disappear from the Duplicate Items folder at this point but will remain in the My Library folder.
**Figure 2: Close-up of drop-down options**

<table>
<thead>
<tr>
<th>Title</th>
<th>Item Type</th>
<th>Info</th>
<th>Notes</th>
<th>Tags</th>
<th>Related</th>
</tr>
</thead>
<tbody>
<tr>
<td>Afghanistan's endless war: state failure, regional ... Geo... 5/21/14 4:11:25 ...</td>
<td>Document</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
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<td>Document</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Troubleshooting the error message *Merged items must all be of the same item type.*

To correct this, go back to the My Library folder and find the item with the problem there, then click in the Item Type field to change the item type so that they all match.
Citing with Zotero in Word

Using the toolbar at the top of the screen (Mac) or in the Zotero tab (Windows), Zotero works within your document to assist with inserting in-text citations and automatically compiling your bibliography. 

You do need to have Zotero open to use Zotero’s Word tools, however.

Setting the Output Style

Before you begin using Zotero to insert the in-text citations or bibliography in your paper, you will need to set the output style. APA is a commonly used style, so in the following example, we will set Zotero to format the in-text citations and bibliography in APA style.

1. In your Word document, click Document Preferences on the Zotero toolbar then scroll through the list to see if the citation style you need is included. If the style you need is on the list, select it then click OK and you are done. If your style is not in the list, click Cancel and move on to Step 2.
2. Open your Zotero library in Firefox (or the standalone version) and click the gear icon.
3. In the Preferences box, select the tab labeled Cite then click the sub-tab labeled Styles.
4. Under the list of styles, click Get Additional Styles…
5. This will open a new browser window that will automatically direct you to the Zotero Styles Repository of nearly 8,000 styles.
6. Use the search options to locate the style you need and click on it to download. A pop-up will appear asking you to confirm installation. Click Install.
7. Return now to Zotero for Firefox and again click the gear icon, then Cite then Styles. Your new style should appear in the list. Select it then click OK.
8. Now in your Word document (shown here on the right), click Document Preferences, find and select the new citation style. You can also opt to have citations appear as footnotes or endnotes using the Display Citations As options. When finished, click OK.

Setting up for In-text Citations

While technically not a “bug,” Zotero does not handle multiple windows very well and often times, the system will appear to “hang” when in fact a pop-up window is waiting for input from you but is hidden under the other layers of your desktop. One of the major offenders, it seems, is the pop-up citation dialog box in Word. Using the Classic Style citation dialog box appears to prevent this frustration and also offers a broader range of citation options. If you haven’t already, you can set Zotero to automatically use the Classic Style citation dialog:
1. Click on the Gear (Actions) icon in your Zotero library (in Firefox), then select Preferences from the drop-down menu.
2. Select the Cite tab then the Word Processors sub-tab.
3. Check the box labeled Use classic Add Citation dialog, then click OK (in PC) or exit using the red circle (in Mac).

**Inserting In-Text Citations**

To insert citations from Zotero into your Word document,

1. First, place the cursor at the location where you want the citation to appear. (Zotero will place the citation at the location of the cursor, so it is important to be sure that the cursor is in the right place.)
2. Next, from the Zotero toolbar, click the Insert Citation icon. The screenshots on the right show the Insert Citation icon for Word both in PC and in Mac. The Mac screenshot includes a close-up of the Zotero toolbar.
3. A miniature version of your Zotero library will appear. You can use the search bar at the top to help you locate the source you need.
4. Select the source you wish to cite.
5. Use the Prefix, Suffix, Page and Suppress Author functions to tweak the citation to fit your needs.
6. When finished, click OK. 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, simply click on it (gray shading will appear) then click the Edit Citations icon in your Zotero toolbar. The Add/Edit Citation box will re-appear (shown above) and you can make your changes then press OK. This will allow you to change the appearance of the in-text citations by adding or removing in-text citations, changing page numbers, adding a prefix or suffix, or manually changing the appearance of the citation. To change the content information in the citation (correcting a typo in the spelling of the author’s name, for example, or adding a year of publication that did not come through), return to your Zotero library to make the change, click away to save the change then, in Word, click the Refresh icon to finalize the change.

Inserting a Bibliography
When you are finished with your document or ready to insert a bibliography, place your cursor at the location for the bibliography and click on the Insert Bibliography icon on the Zotero toolbar.

Finishing Up
To create a final copy of your document, you will need to remove Zotero field codes—or essentially, “unplug” Zotero from your Word file. This will remove the codes inserted into your document by Zotero and will return your document to plain-text. From this point, you will be able to edit any of the areas of the document as you normally would but will lose the automaticity of Zotero formatting. 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 create your plain text, final document:
1. Save your “plugged in” version.
2. From the Zotero toolbar, click the Remove Codes icon.
3. To the warning box, click OK.
4. **Immediately save the new version with a new name.** Now you should have two copies of the file, one with the Zotero formatting and one without.
Zotero in the Cloud

Sync

Syncing your Zotero library with storage available from Zotero’s online server is a good way to back up your library and to access it from multiple computers. If you didn’t set up the Sync function when you installed Zotero, you can easily add it later.

First, however, be sure that you have registered for a free account at https://www.zotero.org/start. Remember the login information for this account as you will need it to set up sync.

Next, to set up the sync process:

1. Click the Gear icon in your Zotero library and choose Preferences.
2. From the Zotero Preferences box, click on the Sync tab and then enter the Email and Password that you originally used to set up your Zotero account.
3. Use the remaining options to set your Sync preferences, then click OK.
4. To run the sync process, click the Sync icon from your local (not cloud) Zotero library (circled below).

Which Library Am I In?

Working with applications between “local” and “cloud” versions can be very confusing – especially when your “local” version is located in the Firefox browser. Hopefully this will help.

For starters, note the little Z that appears in your browser bar when working with Zotero in Firefox (shown below). This icon, which is used to open and close your Zotero library in the Firefox application, is part of your browser toolbar and therefore will appear in both the Firefox application and the cloud version of Zotero. It might simplify things to just think of it as the on/off switch for the Firefox application so, if you opened Zotero by clicking on this Z, you are working in the Firefox application. (Or, if you opened Zotero from an icon on your hard drive, you are working with the Standalone version.)
Working in the online/cloud version, however, requires a login so, if you had to log in to open Zotero, you are working in the online version. Notice how the Z still appears in the browser too.

In the cloud library, the titles are in blue (and clickable to link to more information).

It is not unusual to have both the Firefox application and the cloud versions of Zotero open and running at the same time, especially if you are setting up or working with groups. In that case, your screen would show the Firefox application along the bottom third (or so) and the cloud version in the upper two-thirds. In the screenshot to the right, the Zotero cloud library is highlighted in pink. The remaining Zotero areas are controlled by the Zotero Firefox application.
Where Are My Citations Going?
Clicking on a Zotero download icon will send that citation to the Firefox library, not the cloud library. (If these citations appear in your cloud library, it may be that you have set your sync preferences to automatically update and, through this process, citations are entering your Firefox library and then getting synced up to your cloud library.)

Working with Groups
Zotero also allows users to share citation information and PDF files with other users through its options for Groups. Because Zotero in the cloud works by “syncing” with your local library, there is some back-and-forth between the two when sharing library citations.

Creating a Shared Group

1. Log into your cloud library at www.zotero.org and click on Groups then Create a New Group. In the next screen, create a name for your group and select whether it will be a public or a private group then click Create Group.
   a. Next, add optional information such as a group URL, picture or description.
   b. Add members by clicking Member Settings near the top of the screen then click Send More Invitations, provide e-mail addresses for anyone you would like to add to the group and click Invite Members when the list is complete.
   c. When finished, click back out to the Group Settings box and click Save Settings. The new groups will appear in your Zotero library after your next Sync, which may be immediately if your Zotero is set up to automatically sync.

2. Once the sync is complete and you can see the new group on your local Zotero library under the listing “Group Libraries,” you can drag citations to share into this group. They will sync with your cloud version and will also appear in the Groups tab of anyone with whom you have shared the library.
Accepting a Group 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 or Decline.

Deleting or Changing Permissions for Group Members

Zotero allows you to designate whether your invited group members will simply be able to view the information you have shared (Member) or whether they will be able to both view it and make changes to it (Admin). 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. After you have logged in to your online Zotero account, click Groups.
2. Find the name of the group for which you plan to make changes and click Manage Members. (You will only be able to change these settings for groups that you created.)
3. Members 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 Shared Group

Here’s where things start to get a bit confusing. Individual libraries are stored in the Firefox application, but the shared, group libraries will be in the cloud. Once you have created a shared group, you can add items to it from your local library. You cannot add items to a shared group from your cloud library. It is important to remember as well that you may only add items to groups that you created; you cannot add items to groups created by others.

Adding Items to a Shared Group Library

1. Be sure that you have synced your libraries since the creation of the new group.
2. If you don’t see your group libraries listed, try clicking the expansion triangle to the left of the Group Libraries heading.
3. Be sure you are in the My Library folder, then drag items to share into the appropriate group library.
4. Click the Sync button when you are ready to send these items up to the online Zotero library.
**Bringing Items from a Group Library into your own Library**

Your *My Library* file serves as a permanent location for your items. You can bring items from groups into the *My Library* file to make them your own.

1. First, click on the group which contains the item you wish to add to your *My Library* collection.
2. Next drag the item either to your *My Library* group or a subfolder. The example below shows the article “When metabolism and epigenetics converge” being added to the Biology folder of My Library. Any attached files will be transferred as well.
Getting Additional Help

KU Zotero LibGuide and links:
http://guides.lib.ku.edu/citation/Zotero
Zotero links, how-to guides and download instructions

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

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

Technology Training Workshops at KU:
http://apps.ku.edu/~infotrain/workshops.php
Enroll for free workshops on EndNote, Zotero, electronic thesis and dissertation formatting, Blackboard and more

Or send an e-mail to:
EndNote@ku.edu