Revised Zotero Tip Sheet

User Guide

For Mac Users
- To enable Zotero for Safari it needs to be enabled from the Extensions pane in Safari settings
    1. Open Safari
    2. From Safari click Settings
    3. Select the Extensions tab
    4. Check the box next to Zotero extension to enable it
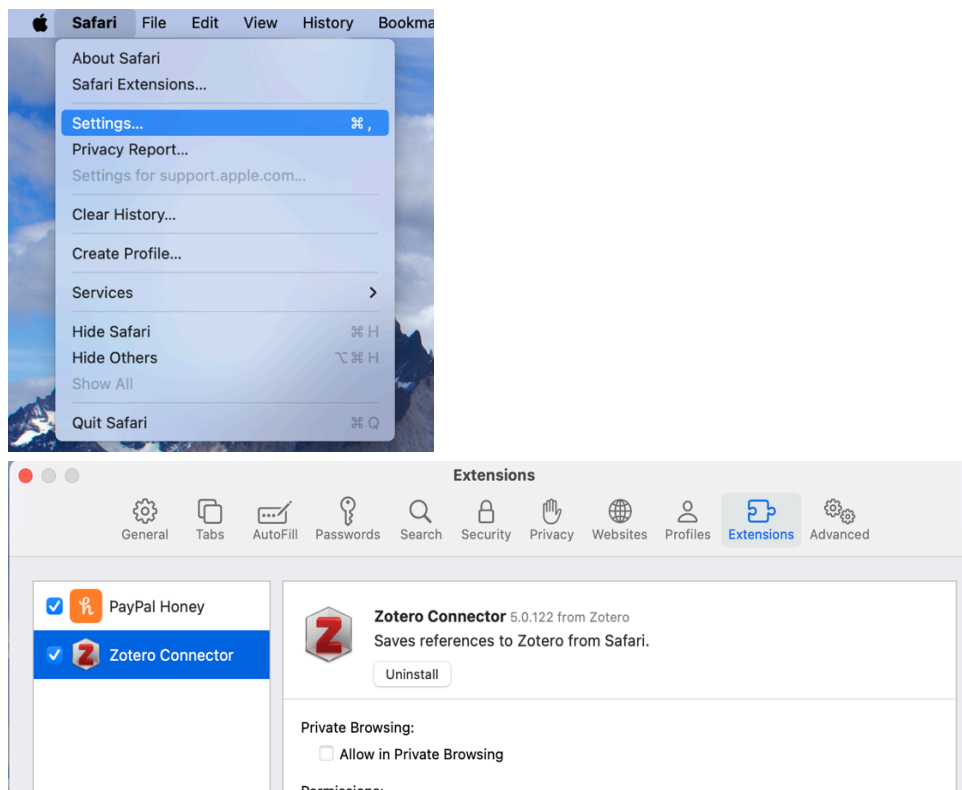
For PC
- Run the setup program you downloaded and follow the instructions

Admin Information

Member Settings
- Roles: regular members, administrators and group owners
- Admin: can manage group settings, roles and visibility
- Owners: have admin rights and can delete or transfer group ownership

Group Ownership & Storage

- Group file storage counts only against the owners storage quota
- Recommend using a shared team account as the group owner for teams/labs to avoid a lockout if a individual leaves
- Group storage is free with Zotero but uses the owners storage account

- Zotero offers 2 types of unlimited storage for organizations via Zotero Lab and Zotero Institution plans. Storage Subscriptions (click link for pricing plan)

Group Types in Zotero

Private Groups

- Only visible to inhibited members
- Hidden from searches and public profiles
- No public presence online
- File sharing available if enabled by admins

Public Groups (Closed Membership)

- Group page is public and joining requires an invitation to join
- Useful for controlled collaboration with public visibility
- Library visibility can be controlled by admins
- File sharing available if enabled

Public Groups (Open Membership)

- Group page is public and anyone can join instantly
- Best for open collaboration and broad discussions
- Library visibility is admin controlled
- No file sharing allowed

Using Zotero with Google Docs & Microsoft Word

- Zotero must be connected to the Zotero desktop application in order to use the web based citing.
- Please ensure file is saved as a **Google Doc** and not **Microsoft Word.docx** to enable Zotero integration
  - Choose file→ **Save as Google Doc** to enable this function
- The first time you do this you'll need to link your Zotero account with your google drive account

Google Doc

Citations
- The drop down menu allows you to add citations, bibliography and change the citation format of your document
- To add a citation, place your cursor at the end of the sentence where you want to add a citation. There are 2 ways to insert a citation:
  - Click the Z icon on the toolbar
  - Click on the Zotero menu and click add/edit citation
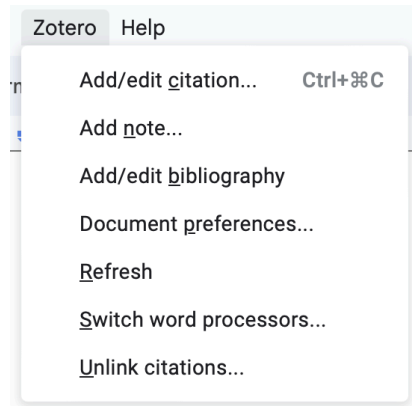
- In the pop-up window that appears, you can choose your preferred citation style, then click ok
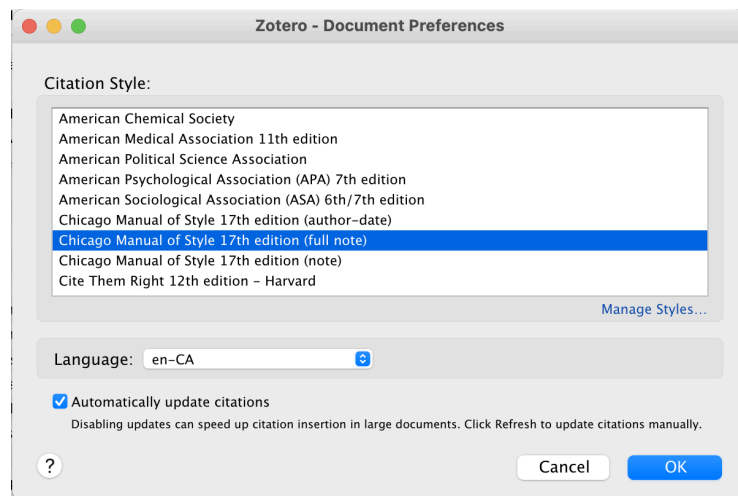
- In the red box that comes up, type in part of the title or an author for the paper you want to cite. Select the correct paper from the dropdown menu.
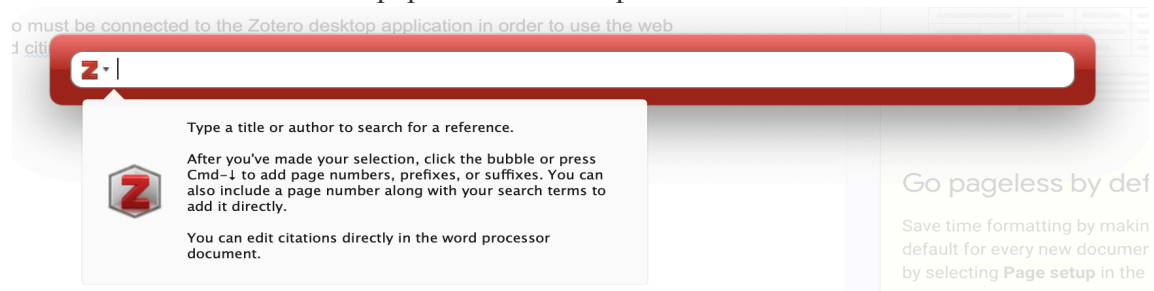
- The citation is now where your cursor was placed
- To change the citation style, click on the Zotero menu, then document preferences. Click on the new preferred style and press ok.

WPS

If you are using an app called WPS Office, please note it is not affiliated with Zotero. However, there is a way to let Zotero work with WPS, but it requires a third party app called a Visual Basic Application (VBA). This is risky as it can corrupt your files and introduce viruses.

We recommend using Google Docs or Microsoft Word because it is affiliated with Zotero. Click the link below for more information

https://www.wps.com/blog/what-is-the-wps-office-and-zotero-and-how-to-use-it/
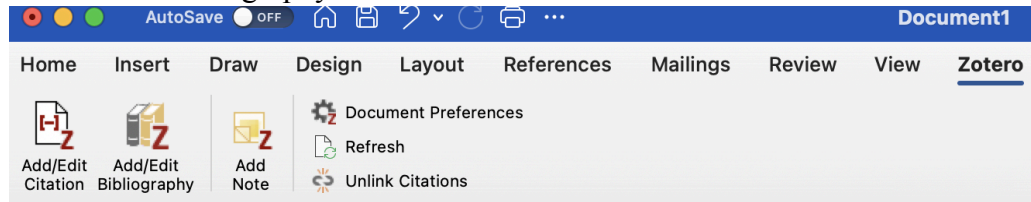
Bibliography
- To create a bibliography, click on the Zotero menu and then add/edit bibliography. A bibliography, formatted in your chosen citation style will be added to your paper.
- Example: The population of Black Canadians doubled from 573,860 persons in 1996 to 1,198,540 persons in 2016, currently accounting for 3.5% of Canada's total population(Statistics Canada, 2023). This remarkable growth is credited, in part, to significant inflows of immigrants and refugees from Sub-Saharan Africa (Brenner & Toulouse, 1990)

Brenner, G. A., & Toulouse, J.-M. (1990). BUSINESS CREATION AMONG THE CHINESE IMMIGRANTS IN MONTREAL. *Journal of Small Business & Entrepreneurship*, *7*(4), 38–45. https://doi.org/10.1080/08276331.1990.10600359

Statistics Canada. (2023). *Black Business Owners in Canada*. https://doi.org/10.25318/11F0019M2023001-ENG

For Microsoft Word
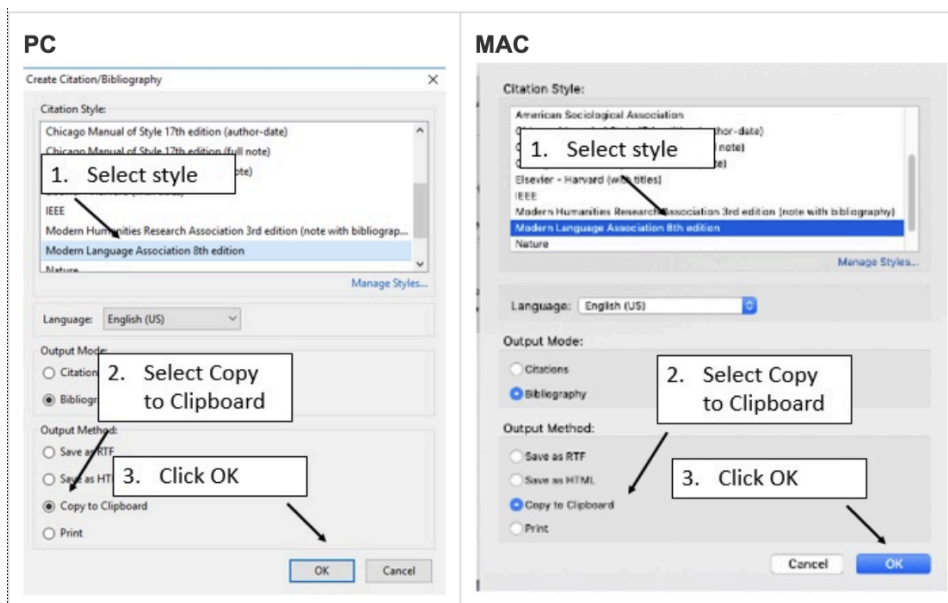- Once installed in Word, Zotero can be found in the toolbar. Click the tab to add/edit citations and bibliography

Quick Bibliography on Mac or PC
- Select some or all of the references in your Zotero library. Right click and select Create Bibliography from Items.
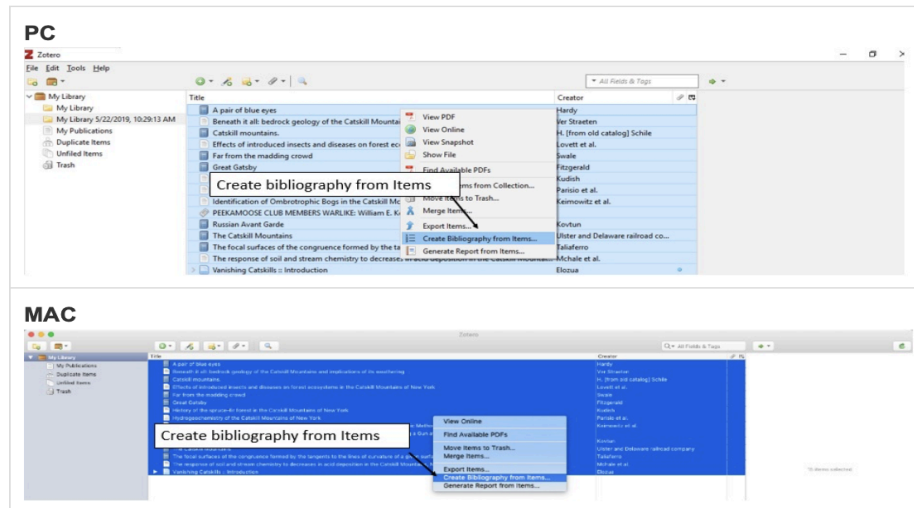
- Choose citation style and copy to clipboard for pasting into document or email

- Paste into the document

Zotero Connector Button

The Zotero Connector is the easiest way to save high-quality bibliographic information as you browse. It detects items like books, PDFs, or journal articles on web pages and lets you save them to your library with one click. The icon changes based on the item type. If no readable data is found, it saves a snapshot instead.

For *Safari* the ZC button will be on the right side of the browser toolbar and for *Chrome* it will appear on the left side. See example of Chrome below.

Important: For Chrome users, the Zotero Connector button may not appear in your browser toolbar if it is pinned. Please try unpinning it from the Extensions menu to make the Zotero Connector button visible.

Creating Collections & Sub Collections

Collections in zotero work like folders to help you organize your references by topic, project or course.

To create a collection

1. Open Zotero
2. In the left pane, right click on **"My Library"**
3. Select **"New Collection"**
4. Name your collection
5. Click ok and your new collection will appear in the left pane

To create a sub-collection

1. Right click on an existing collection
2. Select **"New Subcollection"**
3. Name your sub collection
4. Click ok and your sub collection will appear underneath your collection

Items in Zotero can belong to multiple collections without being duplicated

Creating and Using Tags

**Tags work best on Zotero Desktop compared to Zotero Web Library.

Tags are like labels—flexible, searchable, and perfect for cross-referencing.

Add a Tag to an Item:

1. Select an item in your library.
2. Go to the **right-hand pane** and click the **Tags** tab.
3. Click the **"Add"** button (+) and type your tag.
4. Press **Enter**.

Use Colored Tags:

1. In the **Tag Selector** (bottom-left pane), right-click a tag.

2. Choose **Assign Color**.
3. Select a color (up to 9 can be color-coded).
4. That color appears next to the item in your library.

Tags help you filter your library—click any tag in the bottom-left pane to see only items with that tag.

Creating and Using Notes

Notes are useful for writing summaries, reflections, or copying over highlights from readings.

Create a Standalone Note:

1. Click the **"New Note"** button (note icon with a plus) in the top toolbar.
2. Choose **"Add Standalone Note."**
3. Type your text. It appears in the middle pane and can be moved to any collection.

Create a Item Note (Linked to an Item):

1. Select an item.
2. Right-click the item > **"Add Note"**
3. Write your notes. It stays attached under the parent item.

Use child notes to keep context and reflections tied to a specific source.

Annotating PDFs

Zotero has a built-in PDF reader that lets you highlight, comment, and extract quotes.

Annotate a PDF:

1. Double-click a PDF in your Zotero library to open it in the viewer.
2. Use the toolbar at the top to:
    -   **Highlight text**
    -   **Add comments**
    -   **Underline**

Convert Annotations to Notes:

1. In the PDF viewer's **left sidebar**, open the **Annotations tab**.
2. Right-click a highlight or comment.
3. Select **"Add to Note"** → choose to create a **new note** or add to an existing one.
4. A clickable note is created with your highlight and any comment included.

Great for summarizing articles or gathering quotes for writing.

Duplicates Folder

To remove duplicates:

1. Open Zotero.
2. On the left-hand panel, under **"My Library"**, click **"Duplicate Items"**.
3. Zotero automatically identifies potential duplicate items and lists them here.
4. Select a group of duplicates: When you click on a group in the center pane, Zotero will highlight the items it considers duplicates.
5. Review the items: Zotero shows metadata from each duplicate in the right-hand pane.
6. Choose the version you want to keep (this becomes the "master" item)..
7. Click the **"Merge"** button (top right): Zotero will combine the duplicates into one item, keeping all attached files (like PDFs) and citations.