



ZOTERO GUIDE

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About Zotero

[Zotero](#), a project of the [Corporation for Digital Scholarship](#) (a non-profit organization), is an open-source bibliographic management software program to manage metadata of research information and sources.

The Services are offered free of charge and/or as paid subscriptions. The fees for paid subscriptions are for storage and related services. Please see the Zotero terms for free and subscription services, information on registration, use and conduct, user restrictions, privacy, and copyright.

Why Zotero

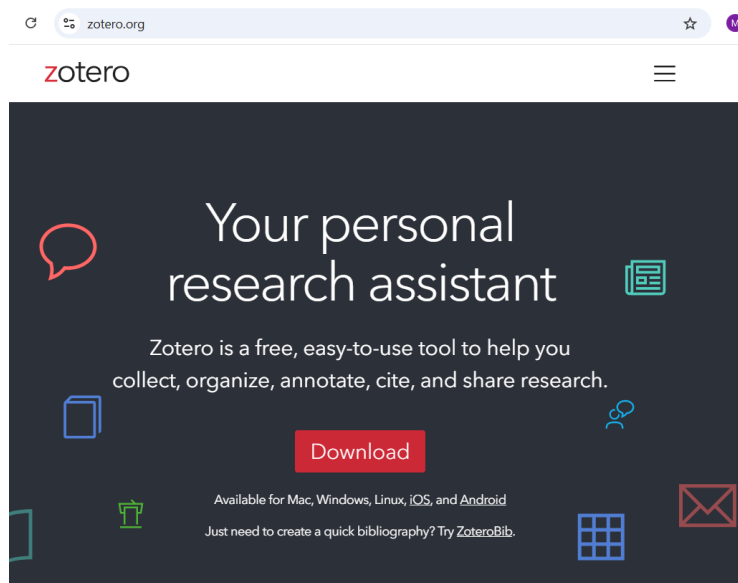
The tool helps researchers to collect, organize, annotate, cite, and share research.

- Import articles and/or citations found in databases, library catalogues or on the web with one click into your library
- Provide open access versions of full text paywall articles if available
- Organize records of the literature into research folders within your library
- Edit metadata to fix errors or add notes
- Incorporate PDFs automatically if available, or upload manually
- Create in-text citations and bibliographies in various styles, like APA, MLA, IEEE, Harvard, etc., including publisher specific styles, with Microsoft Word, Google Docs, or Libre Office
- Change the applicable citation style if required while working on the manuscript
- Create groups and share group assignments records with co-authors.

Software

The software is available at [Zotero.org](#). The download page will show 3 types of software for downloading: the **Zotero software**, the **Zotero browser** connectors and the **Zotero for mobile software**. Download the Zotero software and the applicable browser connector. Zotero for mobile is optional.

The system will automatically offer the latest version of the Zotero software and the browser connector for the default browser on your computer. This can be changed manually if required.

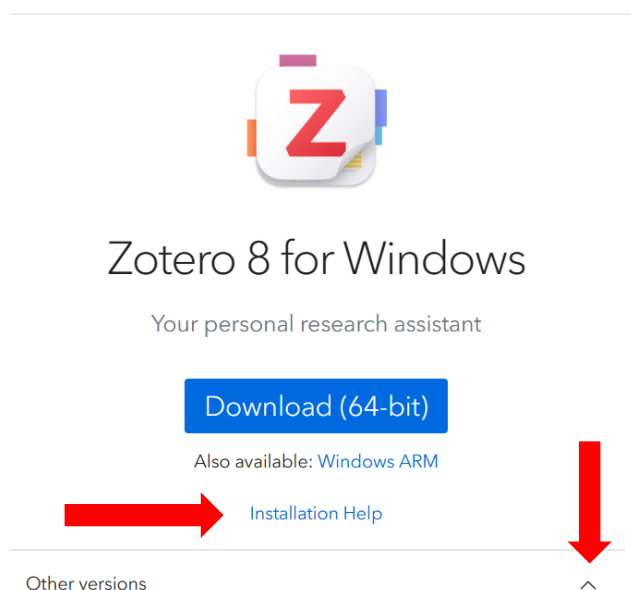


Zotero software

The system will detect your operating system and will offer that version of the Zotero software and applicable connectors. Installation options are also available at the [Zotero download page](#). The current version is Zotero 8.

Click the caret (^) next to *Other versions* at the bottom right-hand corner to download options for Mac, Windows, Linux, iOS, or Android, including for the applicable previous version.

- Click the *Installation Help* link for installation guidance for the different applications.



Select your preferred application and download the software. The [Zotero Start](#) page will appear when the software has been installed successfully. Complete the installation by activating the next three steps:

1. Install the Zotero Connector. Choose the application option at the [Not the browser you're looking for?](#) link to select your preferred option if the default option is incorrect.
2. Register to take full advantage of Zotero. This allows you to sync and access your library from anywhere, and let you join groups and back up all your attached files at no cost.
3. Start building your library. This step provide links to documentation to show what Zotero can do for you.

Zotero connectors

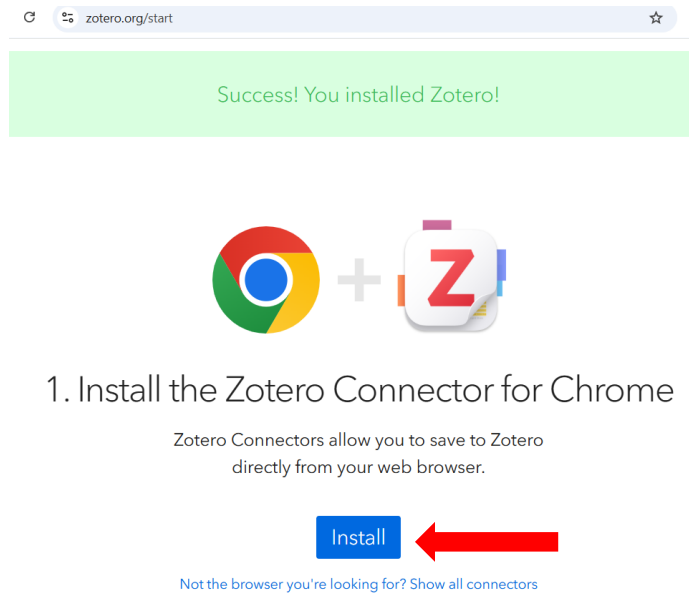
The Zotero Connector for Safari is bundled with Zotero, enable it from the *Extensions pane* in the Safari settings. Other available connectors are Chrome, Firefox and Edge.

Note:

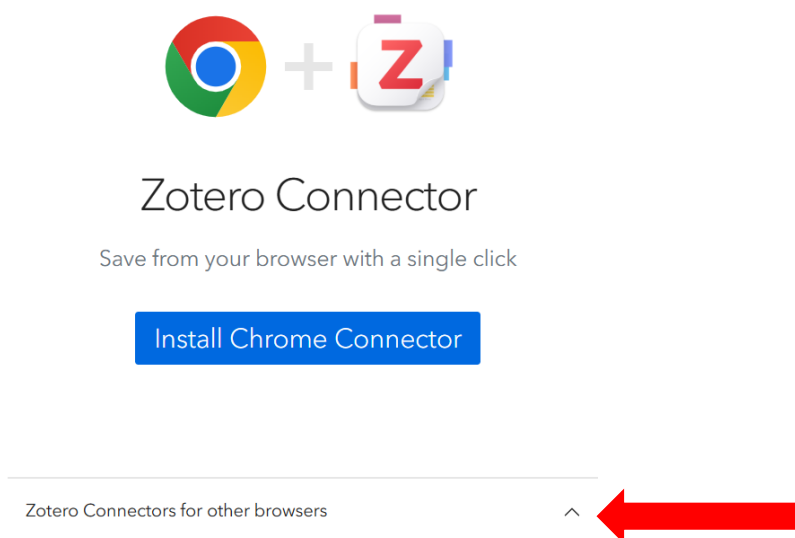
The examples screen shots below prompts the user to add the Zetoro connector to Chrome.

The system will prompt you to install the preferred connector once the Zotero software has been installed successful.

Click **Install** at the bottom of the *Install the Zotero Connect* window to open the Zotero Connector installation page. The browser option can be changed here or on the next screen, the Zotero Connector window.

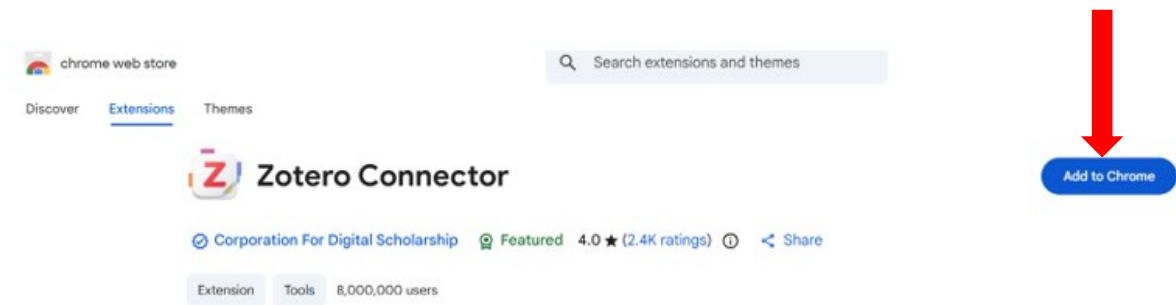


Click the caret (^) at the bottom right-hand corner of the *Zotero Connector* window to choose your preferred connector if not offered.

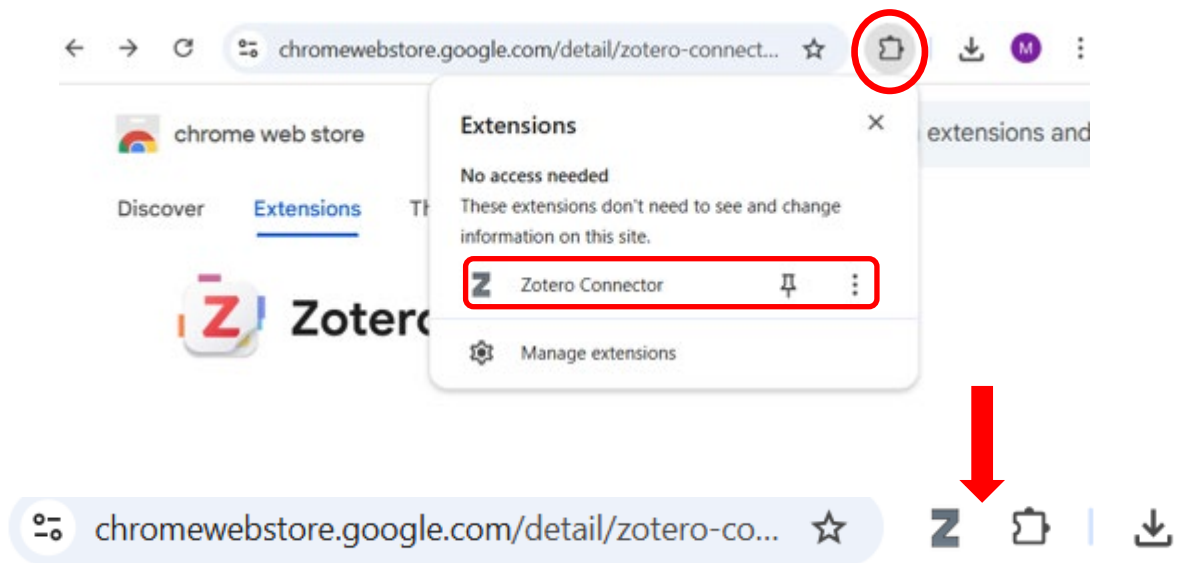


Your browser extensions screen will open.

Click **Add to [browser name]** on the right-hand side of the browser extensions screen to add the connector to the default browser on your computer, e.g. Chrome, Firefox or Edge.

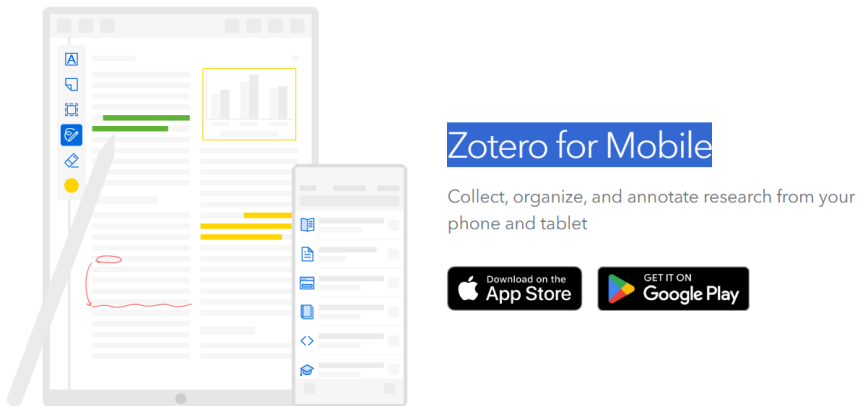


An icon will appear on the top right of your browser. Select the Extension icon and follow the instructions to pin the connector to your browser. The pinned extension will show as a **Z** next to the extension icon in the browser. Right click the extension icon for more options or to unpin the connector. The extension will allow you to download search results into Your Zotero library.



Mobile option

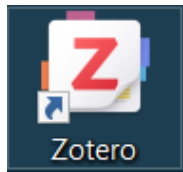
Zotero for Mobile is an optional addition. Follow the instructions to download the software from the App Store **or** Google Play on your mobile phone or tablet.



Zotero desktop versus Zotero web

1. Desktop application

The Zotero desktop icon is installed on your desktop with installation.



Use the desktop application to enable complete functionality. This method is the primary way of using Zotero as it allows more functionality than the website.

A list of desktop features is available at the Zotero Documentation> Getting the Most Out of Zotero> Knowledge Base in the article: [Is the Zotero web library the same as the Zotero desktop app?](#)

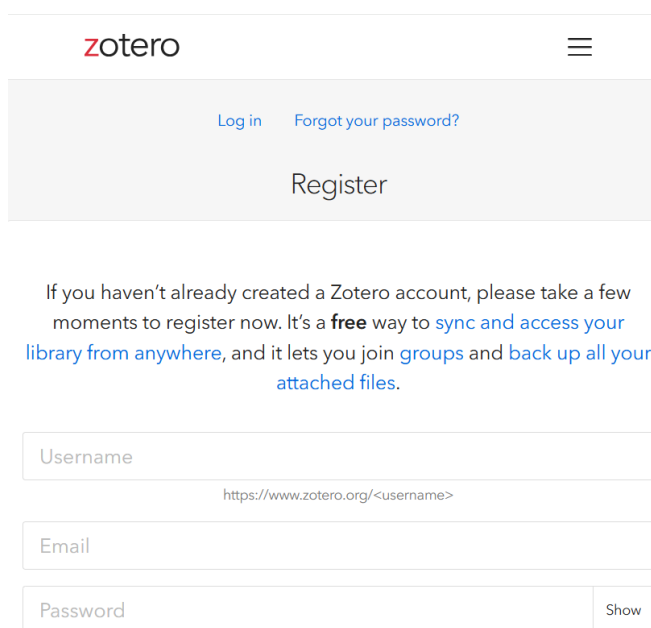
2. The Zotero web library


The web library, a complementary tool, is used to access Zotero data

- when you're away from your main computer
- using a platform that can't run Zotero
- share a Zotero library with people do not use Zotero.

Register a free account

The system prompts you to register a free account once the installations are complete. Registration is also available at the [Login icon](#) on the main Zotero page.



zotero 

[Log in](#) [Forgot your password?](#)

Register

If you haven't already created a Zotero account, please take a few moments to register now. It's a **free** way to [sync and access your library from anywhere](#), and it lets you join [groups](#) and [back up all your attached files](#).

Username
https://www.zotero.org/<username>

Email

Password Show

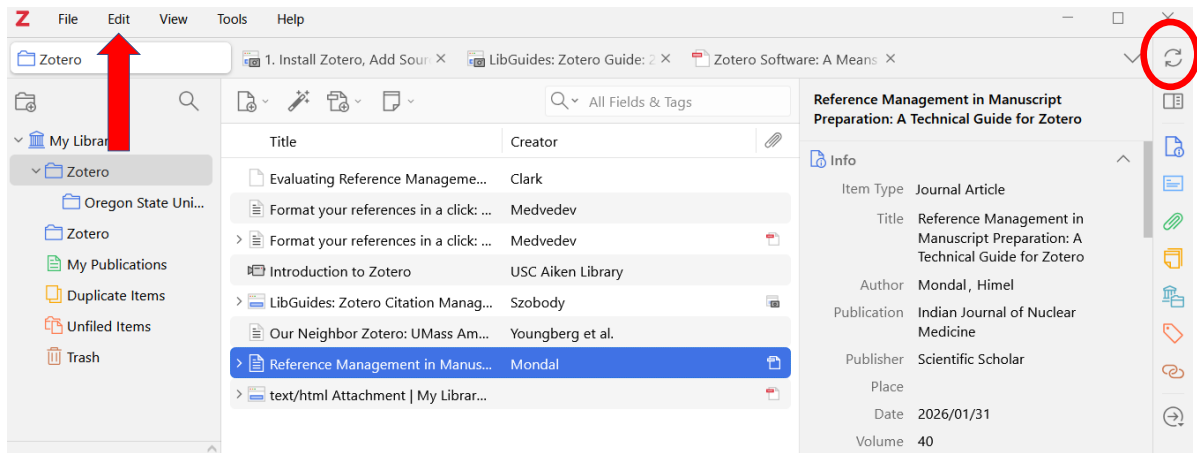
Syncing data

Zotero stores all data locally on your computer by default. Zotero's sync functionality allows you to access your Zotero library on any computer with internet access. Data syncing has two parts:

- Data syncing - free and unlimited
 - Data syncing merges library items, notes, links, tags, etc, but not attachment files, like pdfs and web pages between your local computer and the Zotero servers.
- File syncing – 300 MB free
 - Attached files (PDFs, audio and video files, images, etc.)
 - 300 MB of free Zotero Storage is allowed for attached files, with [larger storage plans](#) available for purchase.

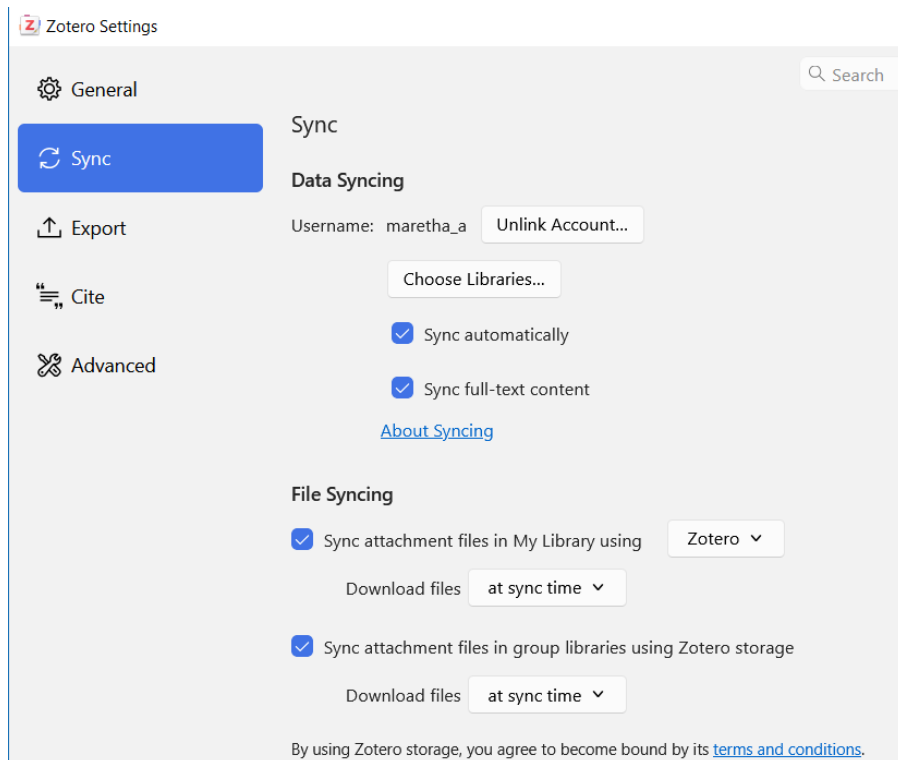
Register for syncing

Login to Zotero and click the [cloud icon](#) on right-hand side of your screen. The system will ask you to login again to open the sync panel. Register here for data syncing.



Change Synch settings

You can change or delete your Sync settings under the Zotero preference window. Open the preferences by clicking Edit>Settings (Windows/Linux) or Zotero>Settings (Mac).



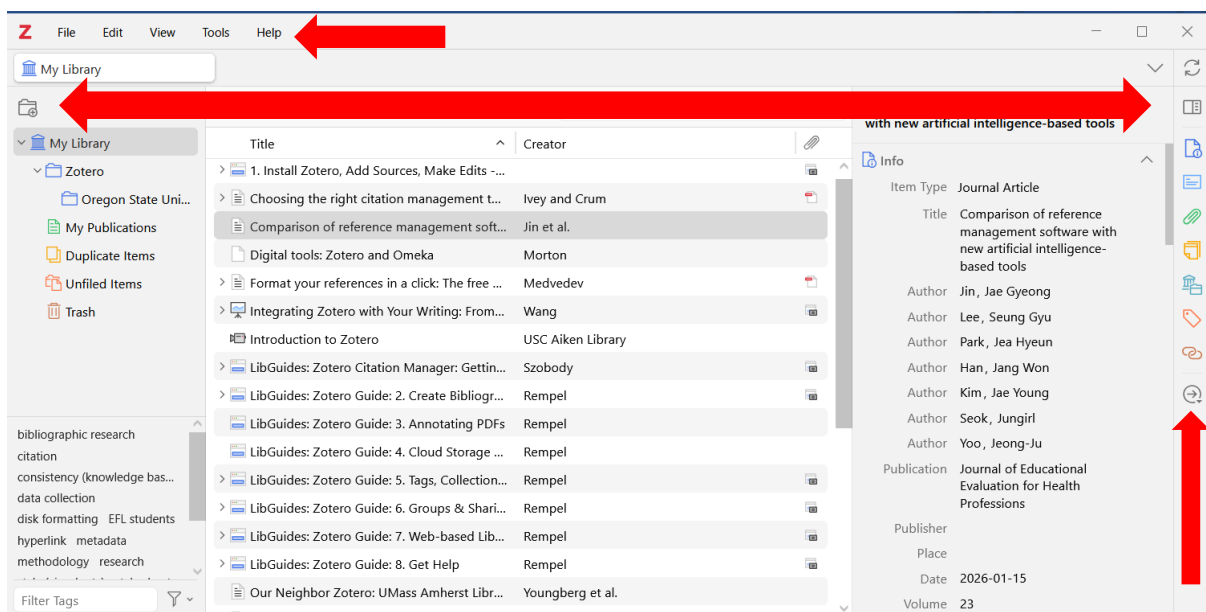
Zotero desktop application window

The Zotero window contains a **Data section**, the **Edit toolbar** at the top of the application and the **Item toolbar** on the right-hand side of the Data section.

Zotero page data section

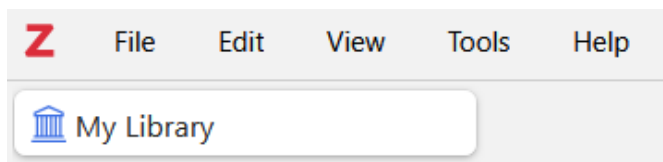
The data section of the Zotero window is divided into 3 parts

- The left-hand column shows My Library and the folders and subfolders in that library. The tags are at the bottom of this column
- The middle column shows the items' titles and creators
- The right-hand column shows the metadata of an item. This column is empty when one opens the application. Highlight an item to show the metadata of that item. Scroll down to see metadata of the other items in that collection.



The top toolbar

Icons on the top toolbar is used to set Zotero window options and preferences.



File

Select the File Options to manage items, collections, import and export data.

Edit

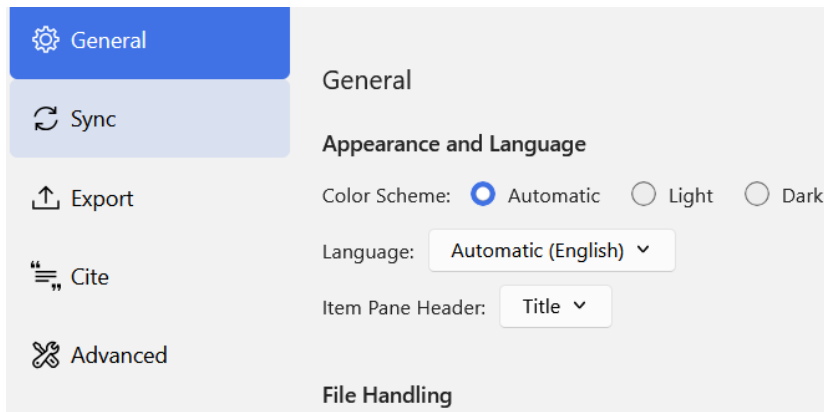
Select Edit for options to/for:

- Undo and Redo
- Cut, Copy, Paste and Delete
- Select All and Find
- Advanced search

- Settings

Clicking *the Settings* option will open the following settings. Highlight each option to show the full settings pages for Zotero general settings. Consult the [Zotero Support](#) documentation for more information.

- **General**, the Zotero general settings
- **Sync**, the options to allow you to access your Zotero library on any computer with internet access
- **Export**, the functions for bibliographic quick copying
- **Cite**, styles options and tools including additional citation styles to more than 10,000 citation styles, as well as Word Processor add-in installation options.



View

The View options allows you to change the views in the window such as:

- Layout
- Density
- Font options
- Add additional data elements to columns
- Sorting options
- Show items in sub-collections
- Hide non-matching annotations
- Opens the search box for the tabs menu.

Tools

The Tools menu includes tool such as:

- RTF to scan items to extract and reformat citations and insert a bibliography into RTF files
- This file can be opened in MS Word and other word operating software
- Install a browser connector option
- Download plugins from the Zotero plugins directory
- Developer options
- Options to manage attachments.










Help

The Help page provides help and technical support links such as:

- Support and Documentation
- Troubleshooting information
- Discussion forums
- Report errors
- Debug Output logging
- Restart in troubleshooting mode
- Check for updates
- About Zotero.

The right-hand side toolbar

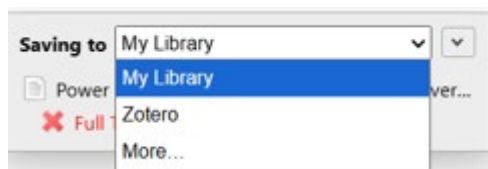
This toolbar icons show information of the various metadata aspects of the item, in which library and collection the item is, the keywords assigned to the item, to which other items the selected item is related, and where to locate the item, e.g., online, pdf, Google, library lookup etc.

ICON	Item Information
	Show All Items
	Info
	Abstract
	Attachments
	Notes
	Libraries and Collections
	Tags
	Related
	Locate

Items and fields in Zotero

The Zotero Connector's save button on the right-hand side of the web browser results page is the most reliable way to add items with high-quality bibliographic metadata to your Zotero library. The save button icon will change depending on the type of material that is added from your browser.

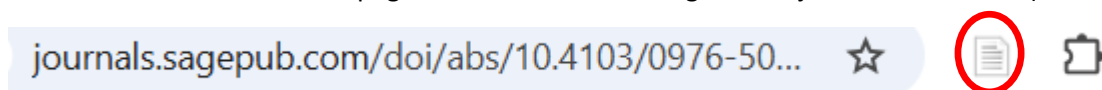
Add books, journal articles, web pages, etc. as items in Zotero by clicking the save button. A pop-up will appear that allows you to save in a specific folder. See [Zotero Item Types and Fields](#) for a full list of item types and fields.



The quality of the Zotero imported data is determined by the information supplied on the webpage. Zotero has website-specific "translators" to obtain the best quality metadata. Right click the save button to change the translator if needed. Report data import issues to the Zotero Forums and provide the webpage URL.

Article icon

The save button on the main page of the article will change to the journal article icon (circled in red).



Book icon

A book icon will show for a book from the library catalogue



Generic webpage icon

Some webpages do not provide enough information for Zotero to recognise. The save button will show a grey webpage or white icon depending on your browser type. Zotero will import these pages as a "Web Page" item with a title, URL, and access date.

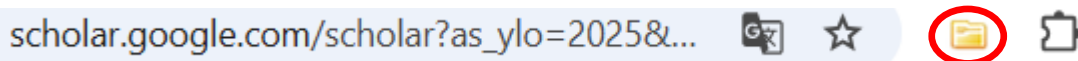


If you are viewing a PDF file in your browser, the save button will show a PDF icon. Saving will import the PDF file alone into your library and then automatically attempt to retrieve information about it. While this will often produce good results, it is usually better to use the save button from the publication's abstract page or catalogue entry, as described above, if there is one.

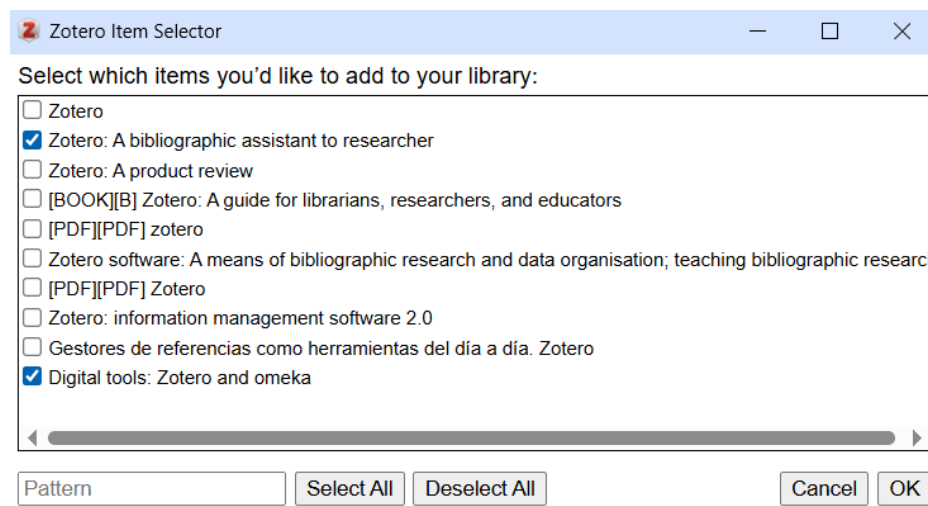


Folder icon

The save button will show a folder icon when multiple search results are offered from databases or Google Scholar.

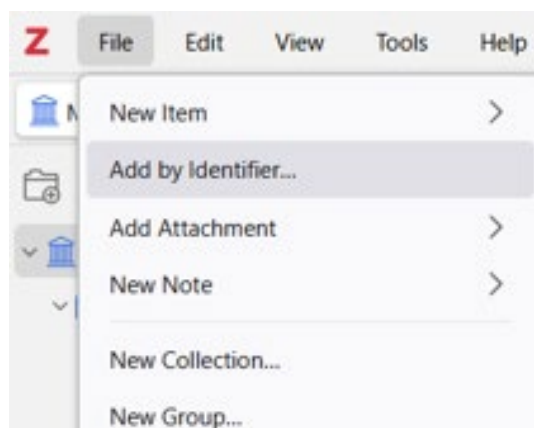


Clicking the folder icon will show the *Zotero Item Selector pane* that will allow you to select and saved multiple search results in Zotero.

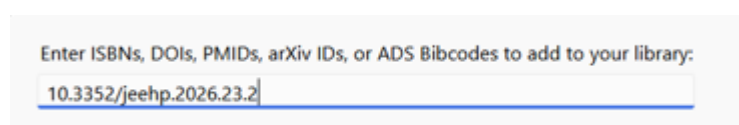


Add Item by Identifier

Add items by identifier if known, e.g., ISBN, DOI, PubMed ID, arXiv ID, or ADS Bibcode. Choose Add by Identifier on the menu bar in the Zotero desktop application.




Enter the identifier and press the enter key. The DOI key 10.3352/jeehp.2026.23.2 was entered in the textbox below.



My Library folder

The system will add the metadata fields of saved items into the *My Library* folder from where one can copy it to the correct subfolder if needed. One can add the pdf if not attached, as well as notes, tags and relation.

Item Type	Journal Article	Citation Key
Title	Comparison of reference management software with new artificial intelligence-based tools	URL http://jeehp.org/DOIx.php?id=10.3352/jeehp.2026.23.2
Author	Jin, Jae Gyeong	Accessed 2026/04/03, 17:37:42
Author	Lee, Seung Gyu	PMID
Author	Park, Jea Hyeun	PMCID
Author	Han, Jang Won	ISSN 1975-5937
Author	Kim, Jae Young	Archive
Author	Seok, Jungirl	Loc. in Archive
Author	Yoo, Jeong-Ju	Short Title
Publication	Journal of Educational Evaluation for Health Professions	Language en
Publisher		Library Catalog DOI.org (Crossref)
Place		Call Number
Date	2026-01-15	License
Volume	23	Extra
Issue		Date Added 2026/04/03, 17:37:42
Section		Modified 2026/04/03, 17:37:42
Part Number		 Abstract
Part Title		Reference management software (RMS) represents a cornerstone of modern academic writing and publishing. For decades, programs such as EndNote, Zotero, and Mendeley have played central roles in facilitating citation organization, bibliography formatting, and collaborative scholarship. Although each platform has introduced unique innovations, persistent limitations remain, particularly with respect to usability, accessibility, and accuracy. In parallel, the rise of generative artificial intelligence has introduced an unprecedented challenge: the inadvertent inclusion of fabricated or incorrect references mistakenly incorporated into manuscripts. This phenomenon has exposed a critical limitation of traditional RMS platforms, namely their inability to verify reference
Pages	2	
Series		
Series Title		
Series Text		
Journal Abbr	J Educ Eval Health Prof	
DOI	10.3352/jeehp.2026.23.2	
Citation Key		

Please see the [Adding Items to Zotero](#) for more information on adding PDFs and other files, standalone attachments and parent items, saving webpages, importing from other tools, large-scale imports from databases, manually adding items, editing items, and verifying and editing your records.

Collections and Tags

Zotero libraries can be organized with [collections and tags](#).

Collections

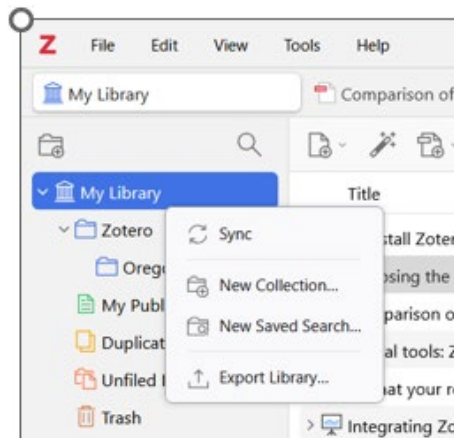
Organize items into hierarchical groups and subgroups.

- An item can belong to multiple collections and subcollections in your library
- Collections are useful for filing items in meaningful groups (e.g., items for a particular project, from a specific source, on a specific topic, or for a particular course)
- You can import items directly to a specific collection or add them to collections after they are already in your library
- Collections are not portable
- Copying items between Zotero libraries (My Library and group libraries) will not transfer their collection placements.

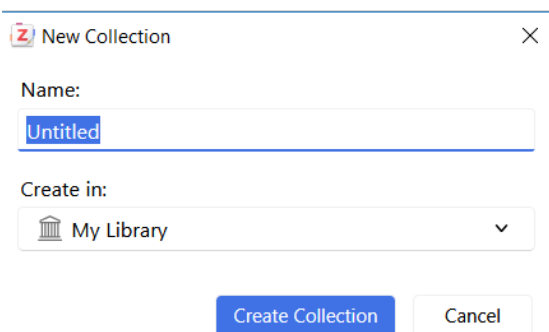
Add a new collection

All new items will automatically be saved in **My Library**.

- Right click on **My Library** and select **New Collection** to add a new collection.

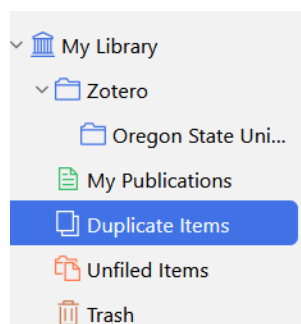


- Add a name for your new collection box will open
- Choose where in the hierarchy the new collection should be saved
 - Main collections will be created as a sub-collection under My Library
 - You can also create sub-collections under your main collections
- Click the **Create Collection** button to complete the task
- Right click the collection name to rename, delete, export, copy, etc., a collection.

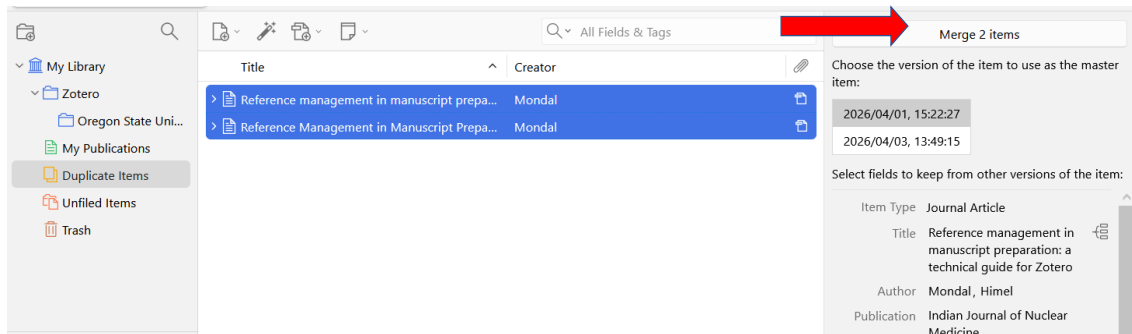


Duplicate items

The Duplicate Collection is a default collection called **Duplicate Items** under **My Library**.



Click on Duplicate Items to check if there are any duplicate items. Select the items and click on **Merge 2 items** on the top right-hand side toolbar.



Tags (keywords)

- Allow detailed characterization of an item, no limits apply
- Tag items based on their topics, methods, status, ratings, or your workflow (e.g., *to-read*)
- Apply filters to your library, or a collection, to show items with the similar tag or keywords
- Tags are portable, but collections are not
- Copying items between Zotero libraries (My Library and group libraries) will transfer their tags
- The tag selector is located at the bottom of the left Zotero pane.

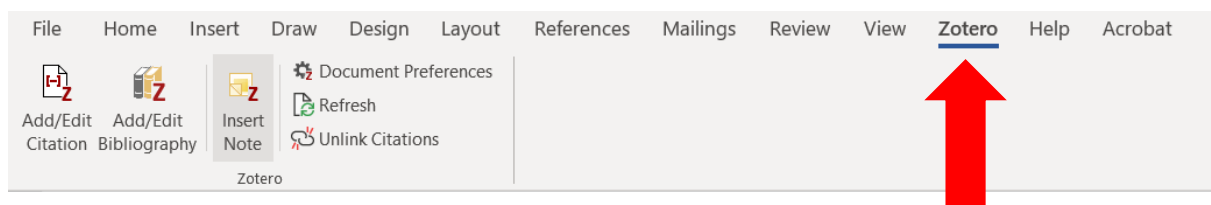
Both organizational methods have unique advantages and features. Experiment to see what works best for your own workflow.

Bibliographies and Citing






Generate dynamic bibliographies, in-text citations, and footnotes in your manuscript with word processor plugins like Microsoft Word, LibreOffice, and Google Docs. See the Zotero [Word Processor plugins](#) page for more information.

- Insert a new in-text citation in your manuscript, and the bibliography will be automatically updated to include the cited item
- Correct the title of an item in your Zotero library and with a click of a button the change will be incorporated in your documents.

The word processor plugins are bundled with Zotero and should be installed automatically for each supported word processor on your computer when you first start Zotero.




The Zotero tab contains these icons:

Add/Edit Citation		Add a new citation or edit an existing citation in your document at the cursor location.
Add/Edit Bibliography		Insert a bibliography at the cursor location or edit an existing bibliography.
Document Preferences		Open the Document Preferences window, e.g. to change the citation style.
Refresh		Refresh all citations and the bibliography, updating any item metadata that has changed in your Zotero library.
Unlink Citations		Unlink Zotero citations in the document by removing the field codes. This prevents any further automatic updates of the citations and bibliographies. Note that removing field codes is irreversible , and should usually only be done in a final copy of your document.

Citing

Open your Manuscript and enter where the citation should appear in the text.

Click the **Add/Edit Citation** icon () to open the citation dialog box. This dialog box is used to select items from your Zotero library and create a citation.

The system may prompt you to choose a citation style from a predefined list. You can add a style to the list if not listed to bring a selection list so that you can add your preferred style.

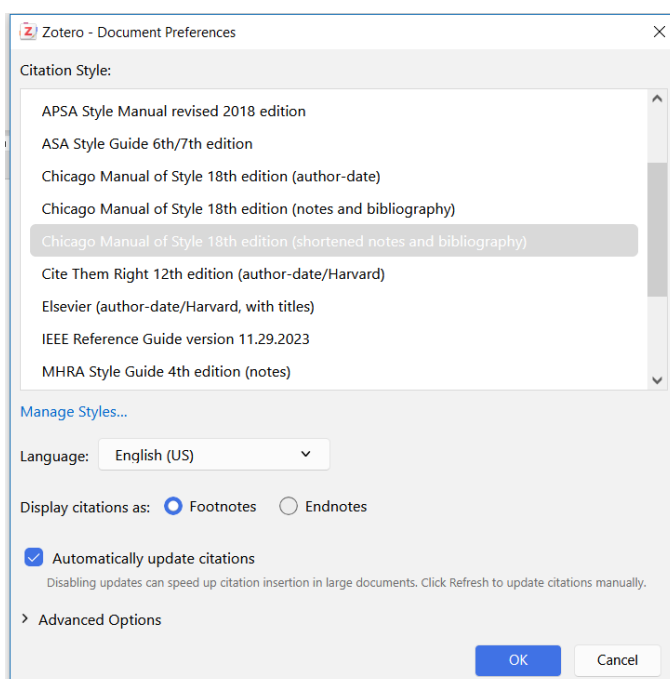
- Click on the **Manage Styles** hot linked text at the left-hand bottom of the Citation Style window and click the additional styles button to open the Style Manager. Choose **Get Additional styles** to open a selection list or select **Add from file** to upload a style that is not listed.

[Manage Styles...](#)

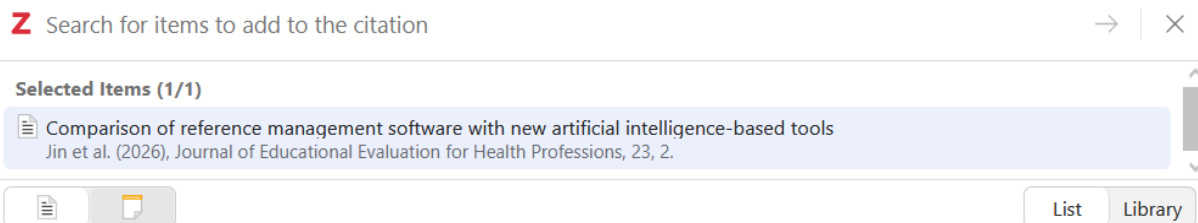
[Get Additional Styles...](#)

[Add from File...](#)

Close the Styles window and Click the **Citation button** again. Make sure that your cursor is at the correct place in your manuscript.



- Click OK to open the search box in our Library
- Type the title, last name(s) of author(s) and/or year in the dialog box
- Matching items will show in the dialog box
- Press the Enter key on your keyboard to select the item. The selected item will be highlighted .



- Press the Enter key on your keyboard again to add the full citation to your document.

Bibliography

Open your Manuscript and enter where the citation should appear in the text.

- Click the **Add/Edit Bibliography** (📄📑) button to insert a bibliography at the cursor location
 - Zotero will automatically update the bibliography based on the citations in the document
- Click the Add/Edit Bibliography button again to add more items manually
 - The bibliography editor will open
 - Use the arrows to add or remove items.

Manual edits in Word will be overwritten when Zotero refreshes the document again. Therefore, manual edits should only be done as a final step before submitting the document.

- Save a backup copy of the document
- Click the “Unlink Citations” button in the Zotero toolbar of your document to disconnect your document from Zotero
- Convert all citations and the bibliography to regular text
- Finally, make your adjustments to the bibliography text.

Quick copy a bibliography

Create a quick copy of your references and export it as an rtf file if you want to quickly add references to a paper, email, or blog post.

- Highlight selected references in your collection
- Right click and select **Create Bibliography from Item(s)...** to open the Citation panel
 - Select the output mode (Citations or Bibliography)
 - Select the citation style
 - Choose to save as an RTF, or HTML file, or copy to the clipboard, or print the bibliography.

Reading list

National University. *Library How-To Guides: Zotero*. Retrieved March 11, 2026, from <https://resources.nu.edu/zotero>

Rempel, H. *LibGuides at Oregon State: Zotero guide, parts 1-8*. Retrieved April 1, 2026, from <https://guides.library.oregonstate.edu/zotero>

Rhodes University. *Library Lib Guides: Zotero*. Retrieved March 11, 2026, from <https://ru.za.libguides.com/c.php?g=174199>

University of New Mexico Libraries: *Zotero: A Beginner's Guide*. Retrieved March 11, 2026, from <https://libguides.unm.edu/Zotero/download>

University of the Witwatersrand. *LibGuides: Zotero*. Retrieved March 11, 2026, from <https://libguides.wits.ac.za/c.php?g=145466&p=952186>

USC Aiken Library. *Introduction to Zotero* [Video recording] <https://www.youtube.com/watch?v=8B8GHo3PV24>

Zotero. *Documentation*. Retrieved March 11, 2026, from <https://www.zotero.org/support/>

Zotero. *Knowledge Base*. Retrieved March 11, 2026, from <https://www.zotero.org/support/kb>

Zotero. *List of Zotero tutorial videos*. Retrieved March 11, 2026, from https://www.zotero.org/support/screencast_tutorials

Zotero. *Zotero Quick start guide*. Retrieved March 11, 2026, from https://www.zotero.org/support/quick_start_guide