



UNIVERSITY OF  
CAMBRIDGE

*Faculty of Education*

# Zotero Self-Paced Training Guide

**2020-2021 v3**

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with

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Faculty Library Team

## How to use this self-paced training guide

Work through the steps in the order they are presented. Work at your own pace. A tutor will be available to offer support as needed during Faculty workshops or online 'drop-in' sessions. You are not expected to complete all the steps in the workshop. The aim of the workshop is to get you up and running with Zotero. You can then continue to work through the steps in your own time.

### Note

This is a basic introduction to Zotero. For full guidance, support forums, up to date information and screencasts of how to use key features, including links to Zotero on Twitter and Facebook, we *strongly* recommend you consult the developers' pages:

<http://www.Zotero.org/>

[http://www.Zotero.org/support/quick\\_start\\_guide](http://www.Zotero.org/support/quick_start_guide)

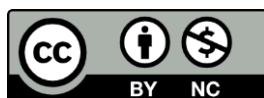
The **Knowledge Base** is also an excellent resource:

<http://www.Zotero.org/support/kb>

*Zotero is constantly being improved and updated so certain information/screen grabs etc. in this guide could go out of date. Always consult the Zotero website for the most up-to-date and authoritative information.*

*This guide is also based on using Zotero with Firefox on Windows PC computers using Microsoft Word in Office 365. While most of the features/instructions are similar on Apple Macintosh systems, for full guidance please consult the Zotero website. To access contextual menus on a Mac (right-click on a PC mouse): hold down CTRL key + then click with mouse: <http://www.wikihow.com/Right-Click-on-a-Mac>*

**Acknowledgments** Full acknowledgements go to the Zotero developers and their excellent online guides. Many thanks to Hazel Alexander (Library Team). Also, Lauren Kendrick, Rosemary Deaney and Zsolt Lavicza for constructive feedback/input on previous versions of this guide. Thanks also to Rosemary Rudd of the University Computing Service for sharing the UCS self-paced guide.



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## Contents

<b>Why use Zotero?</b> .....	<b>5</b>
<b>Section 1: Installing the software/Basic Features</b> .....	<b>6</b>
STEP 1: Download & install Zotero.....	7
STEP 2: Install the Zotero Connector for your Browser .....	8
STEP 3: Check the Word plug-in.....	8
STEP 4: Take a quick tour of Zotero .....	10
STEP 5: Set Zotero’s Preferences .....	12
STEP 6: Left-hand column: create a collection.....	16
STEP 7: Middle Column: Find & store references .....	17
STEP 8: Right Column: Check/Edit Individual Reference Information .....	20
<b>Section 2: Searching, Sorting, Creating Bibliographies &amp; Reports</b> .....	<b>23</b>
STEP 9: Search Databases for Articles.....	24
STEP 10: Sort your references.....	26
STEP 11: Create a Quick Bibliography .....	27
STEP 12: Generate a report.....	28
<b>Section 3: Zotero &amp; Word - Citations &amp; Reference Lists</b> .....	<b>29</b>
STEP 13: Use Zotero to insert citations into a Word document .....	30
STEP 14.1: Author/s in sentence – date in brackets (Suppress Author) .....	34
STEP 14.2: Two or more citations (multiple).....	35
STEP 14.3: Suffix added – page number .....	36
STEP 14.4: Prefix and suffix added .....	38
STEP 15: Create a reference list from your citations .....	39
<b>Section 4: Backing up, Syncing &amp; Importing/Exporting</b> .....	<b>41</b>
STEP 16: Back up your Zotero library .....	42
STEP 17: Sync your library online .....	44
STEP 18: Import & Export References.....	45
<b>Section 5: Further Features &amp; Functions</b> .....	<b>46</b>
STEP 19: Create a Reference Item Manually.....	47

STEP 20: Adding Citation Style APA 7<sup>th</sup> Single Space .....49

STEP 21: Attach a pdf file to a reference .....51

STEP 22: View Screencast Tutorials.....52

STEP 23: ZOTERO FAQ.....53

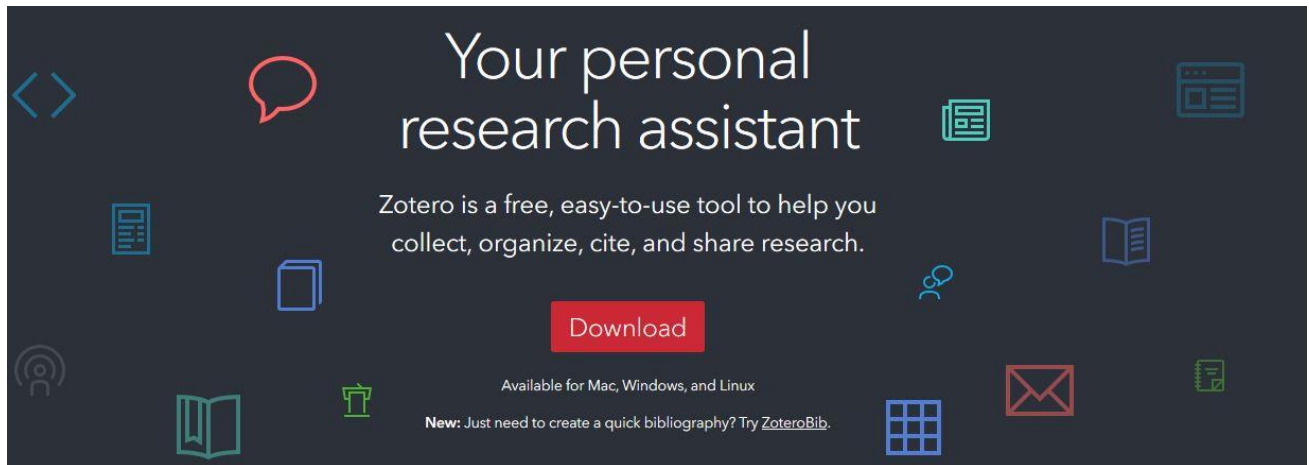
**Section 6: What else can you do?..... 56**

STEP 24: A reflection .....57

STEPS 25–30 .....58

STEP 31: Closing reflection .....59

## Why use Zotero?



Zotero is a **free** tool which you can use:

- to **record** references manually and from online searches;
- to **build** up a library as you search online, store references on your computer AND synchronise them online with a free Zotero account;
- to create bibliographies quickly and easily;
- to **tag** and **search** references, store abstracts and notes on your readings;
- to **compile** reference lists for your course essays and thesis automatically - Zotero is designed to work in conjunction with Word and with OpenOffice.

***Zotero will save you hours of typing out references!***

## Section 1: Installing the software/Basic Features

### Steps 1 – 8

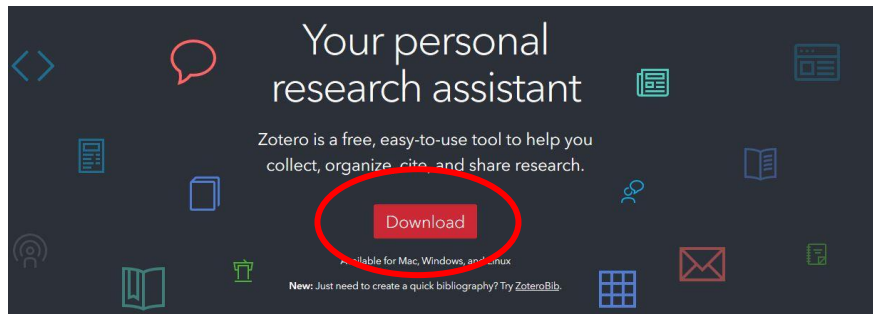
	<i>Completed</i>
1. Download and install Zotero	<input type="checkbox"/>
2. Download and install Zotero Browser Connector	<input type="checkbox"/>
3. Download and install the Word plug-in	<input type="checkbox"/>
4. Take a quick tour of Zotero	<input type="checkbox"/>
5. Set Zotero's Preferences	<input type="checkbox"/>
6. Left-hand Column: Create a collection	<input type="checkbox"/>
7. Middle Column: Find and store references	<input type="checkbox"/>
8. Right Column: Check & edit individual references	<input type="checkbox"/>

## STEP 1: Download & install Zotero

1. **On your computer**, open either the Firefox, Chrome, Edge or Safari browser and go to the Zotero homepage:

<http://www.Zotero.org/>

2. Click the 'Download' button:



3. Find and click the download link for **Zotero** depending on your computer platform:



4. Click 'yes' or 'allow' for any boxes that pop up during the installation.
5. When Zotero is installed, you'll see it in your computer start menu/on your computer desktop. You can 'pin' it to your start menu and 'taskbar' (bottom of the screen) to access it quickly in future.

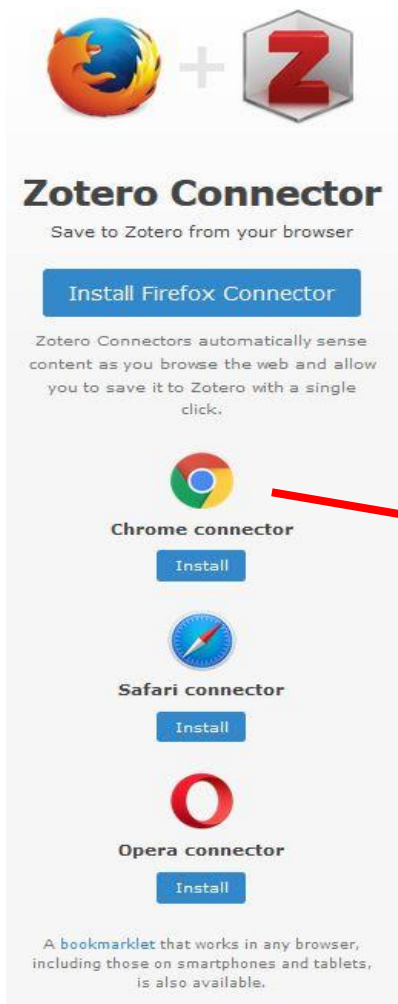


## STEP 2: Install the Zotero Connector for your Browser

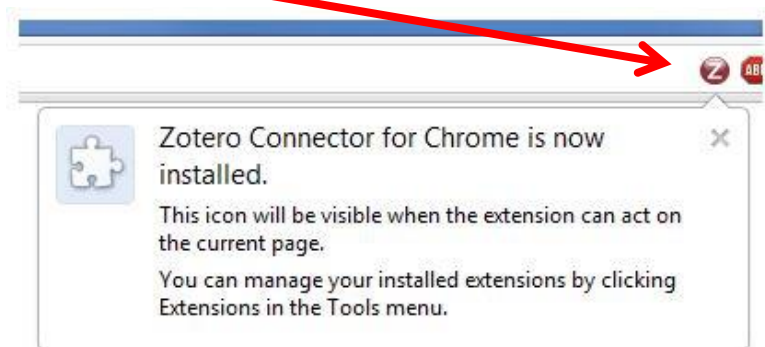
- On your computer: from either the Firefox, Chrome, Edge or Safari browser, go back to the Zotero download page:

<http://www.Zotero.org/>

- Install the **connector** for whichever browser you are using. *NB there is no connector for Internet Explorer.* Click 'yes' or 'allow' for any boxes that pop up during the installation.
  - The connector will appear as a tiny icon in your browser toolbar at the top of the screen (it might look different depending on your browser - Chrome example below)
  - The connector will allow your browser to save citations to your Zotero library



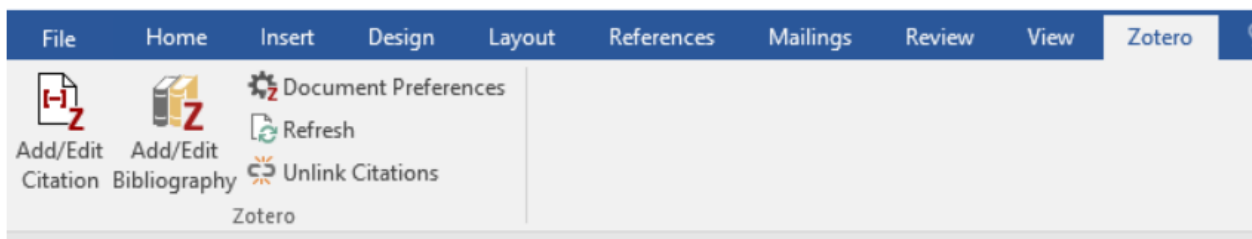
The screenshot shows the Zotero Connector website. At the top, there are logos for Firefox and Zotero. Below them is the heading "Zotero Connector" and the subtext "Save to Zotero from your browser". There is a prominent blue button labeled "Install Firefox Connector". Below this, a paragraph explains that connectors automatically sense content and allow saving it with a single click. There are three sections for other browsers: "Chrome connector" with an "Install" button, "Safari connector" with an "Install" button, and "Opera connector" with an "Install" button. At the bottom, a note mentions a bookmarklet available for any browser.



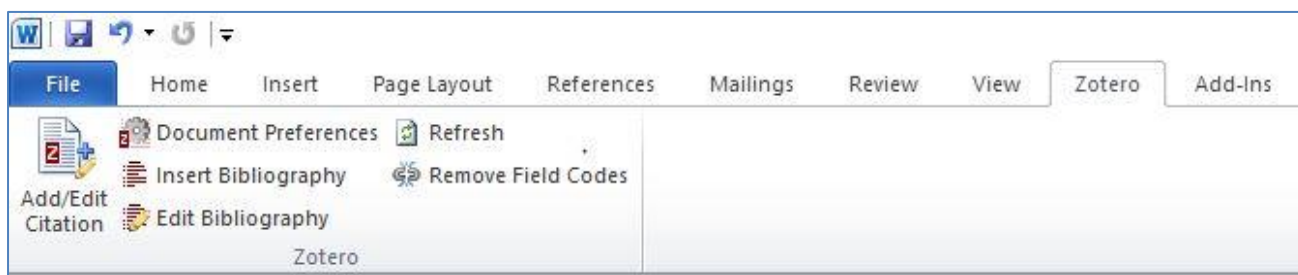


## STEP 3: Check the Word plug-in

1. For Zotero 5.0, the word processor plugins are bundled with Zotero and should have been installed automatically when you first started Zotero.
2. **Open Word.** If you see this row of icons (or similar) in your toolbar the plug-in is installed correctly:



Older versions of Word may look as follows:



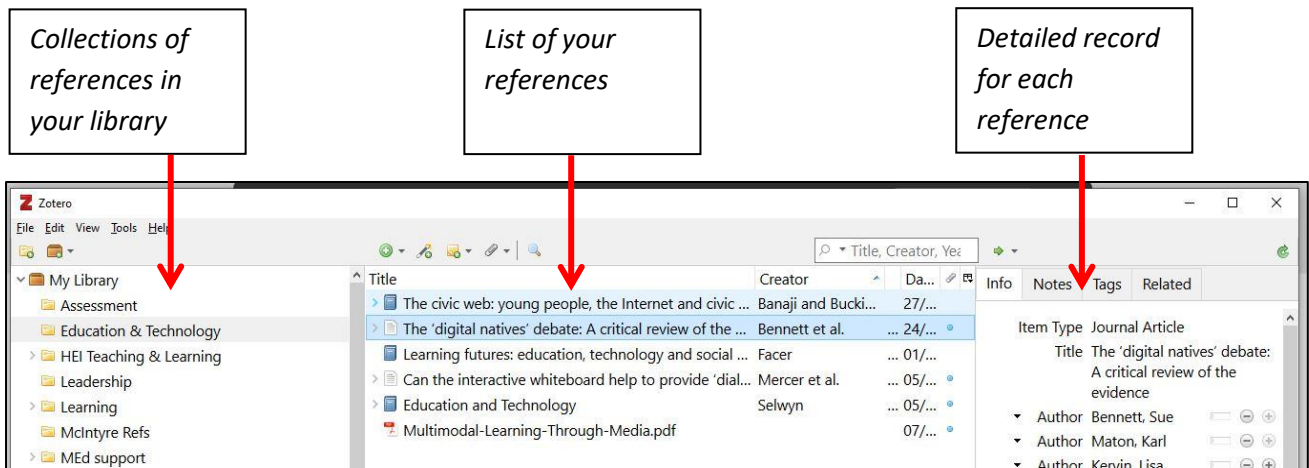
- These icons allow you to manage Zotero references in your Microsoft Word documents.
  - If you do not see the Zotero toolbar:
    - ensure you have clicked 'enable content' if this appears in the banner at the top of your Word document
    - try checking the "Templates and Add-ins" window in Word:
      - click on the 'insert' tab in the Word toolbar
      - click on the down arrow next to 'My Add-ins' then select 'Manage Other Add-ins' to check that Zotero is listed.
3. If you still can't see the plug-in, check the Zotero word processor plugin troubleshooting page: [https://www.zotero.org/support/word\\_processor\\_plugin\\_troubleshooting](https://www.zotero.org/support/word_processor_plugin_troubleshooting)

*Make sure you do not have Word open if you are installing the plugin manually.*

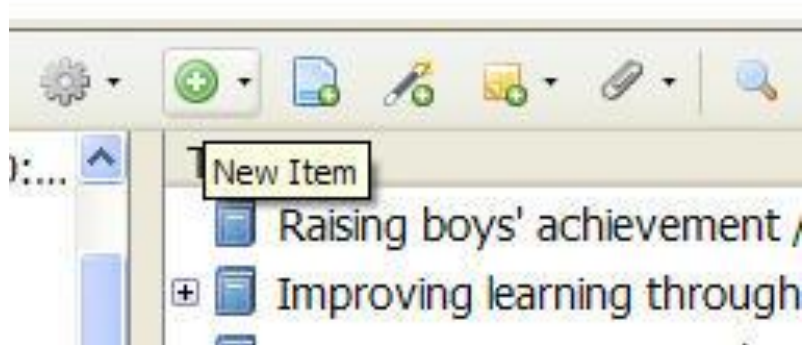
## STEP 4: Take a quick tour of Zotero

### The Zotero Columns & Icons

- Familiarise yourself with Zotero's 3 main **columns**. NB your library **will be blank** since at the moment you do not have any references in it. This is a screen shot from a library which contains references.



- Move your mouse over the various icons to find out what they do.



- Clicking on some icons will reveal **drop-down menus**

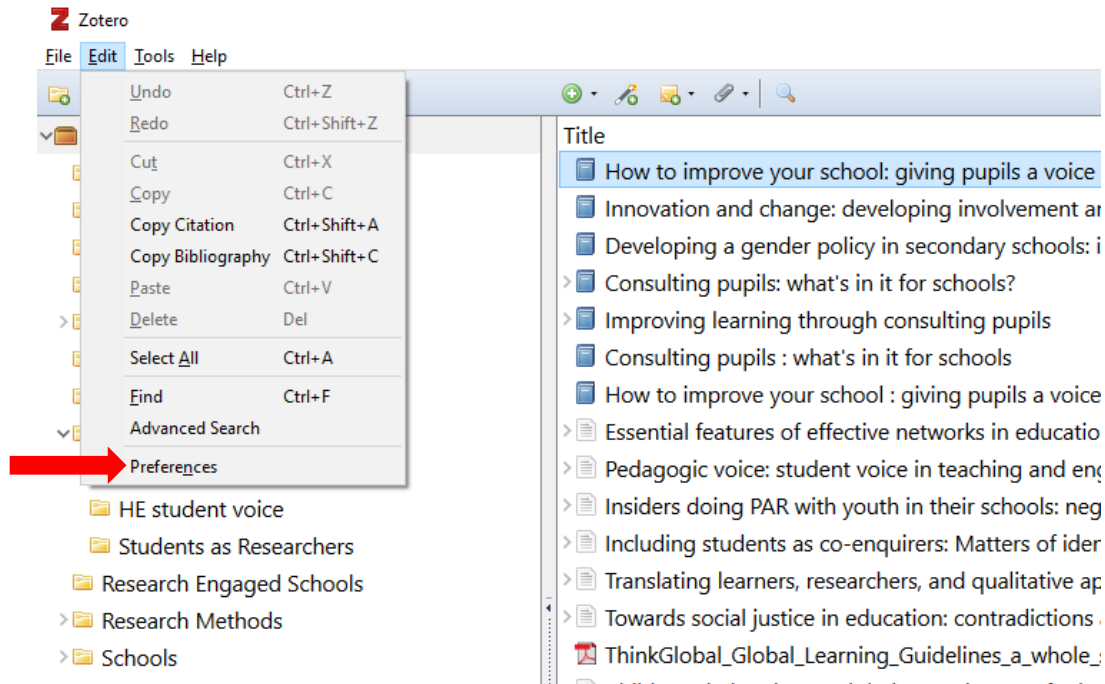


- You don't need to know all of the features and functions indicated by these icons to start using Zotero.

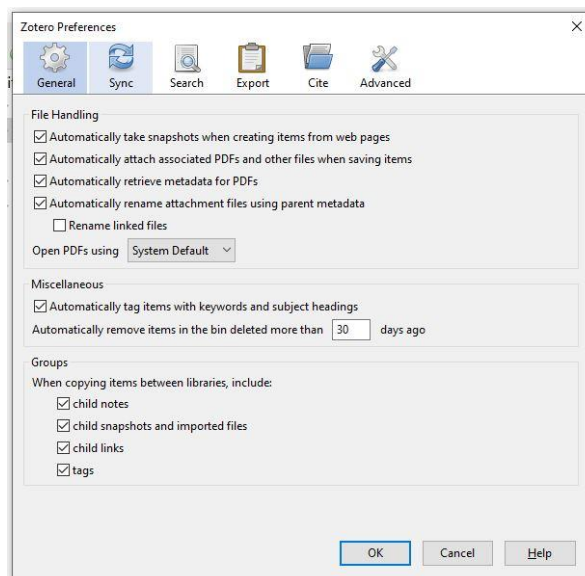
## STEP 5: Set Zotero's Preferences

Before you start gathering references, set Zotero's Preferences. 5 minutes spent on this will save you time later . . .

1. Click on 'Edit' in the menu (or Zotero for Mac) and select **Preferences** from the drop-down menu:



This will open up the **Preferences** Box and Menu:



2. There are **tabs** for setting various preferences:

- General
- Sync
- Search
- Export
- Cite
- Advanced

Some of these are for users with advanced knowledge and experience of Zotero. We recommend you do not make any changes here unless you fully understand what you are doing (e.g. based upon advice from the Zotero website or forums). For this introduction to Zotero, we recommend you apply the following settings:



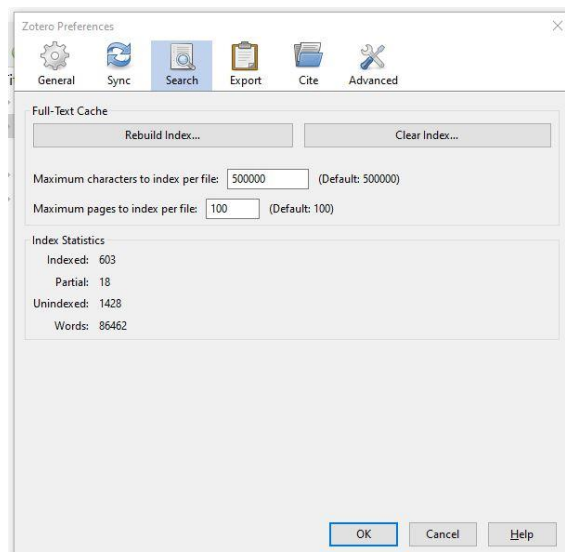
- *File Handling, Miscellaneous & Groups*: leave all boxes with a ✓

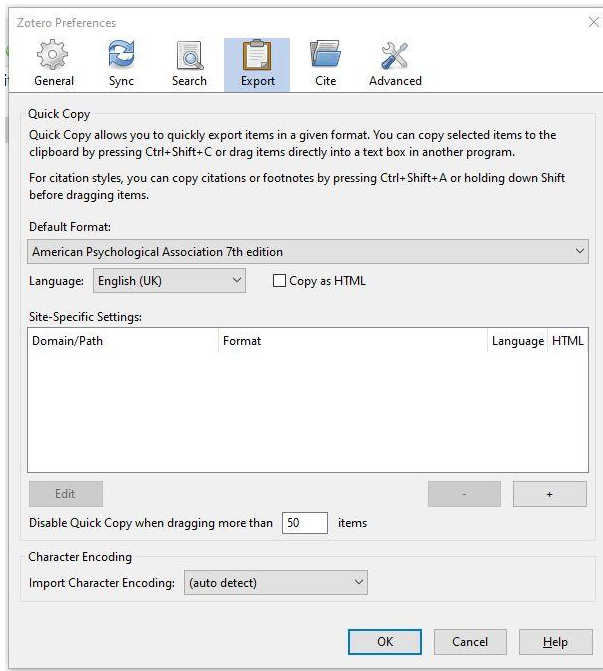


- Leave this alone for now – return to it when you have read more about creating a free Zotero account so that you can synchronise your library online. **NB Sync is optional – you do not need to sync to use Zotero but it provide you with extra useful features.**
- Later you can click on ‘about syncing’ and ‘about file syncing’ to read more on the Zotero website (a new window in your browser will open up).



Leave this unchanged.





Default output format:  
  
Select:  
American Psychological  
Association 7<sup>th</sup> Edition  
(APA 7<sup>th</sup> Ed.)  
  
This is the Faculty  
recommended  
referencing style (APA 6<sup>th</sup>  
is also acceptable)

Click OK to save (Macs: no OK – save is automatic)

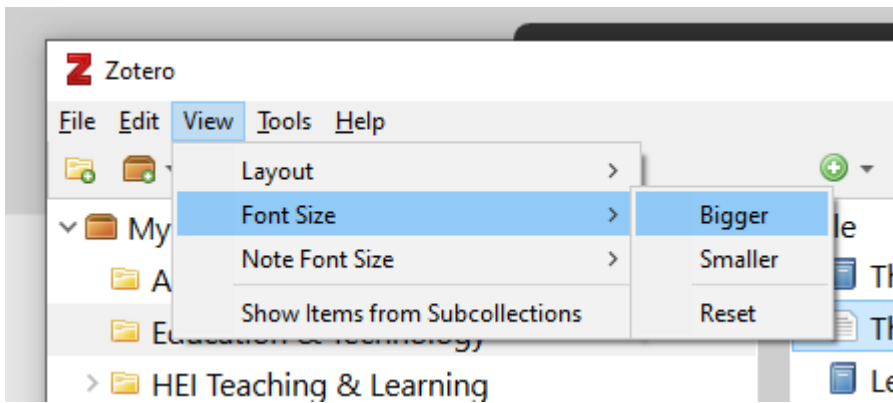
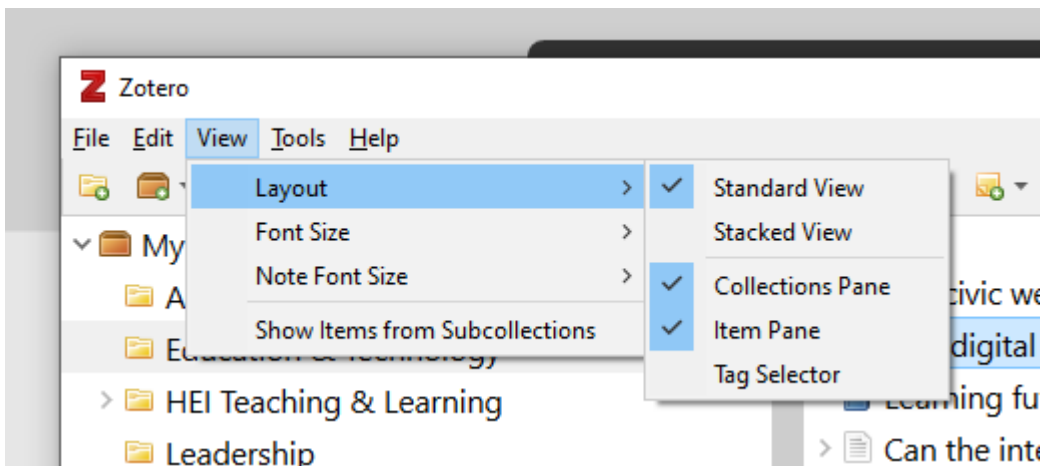


- Leave this for now – you will return to this later when using Zotero with Word.



- Leave all settings alone.
- On the **Files and Folders** tab, click on the **Show Data Directory** button
  - This opens up your Zotero system files stored within your Firefox program files on the Hard Drive of your computer.
  - **Do not attempt to open any of these files – if you do you could corrupt your Zotero database!**
  - This button will come in useful later in **Step 16** when you learn how to back up your Zotero library.
  - **Close the window** that opened up and **close** the Zotero Preferences window.

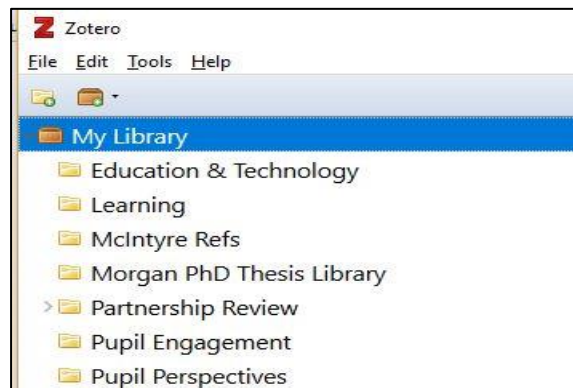
- You can adjust the layout, font size etc of your Zotero library via **VIEW** in the menu toolbar:



## STEP 6: Left-hand column: create a collection

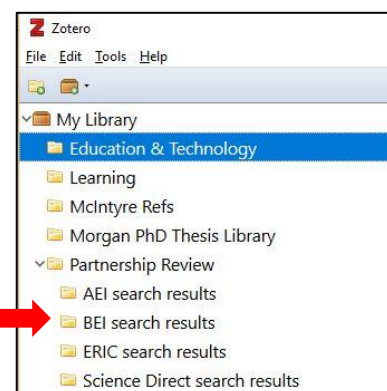
### The left-hand column

- All references are contained within 'My Library'
- You can also create folders – called '**collections**' – for your references
- Create a new **collection** now
  - Go to **File** and select **New Collection**
  - Or Right-click on **My Library** and select **New Collection** from the pop-up menu
  - **Name** your collection e.g. Trying out Zotero
    - It will appear in the left-hand column. It's empty for now but in a later step you will store some references here.
  - **Unfiled Items** contains items you have not yet allocated to a collection.
  - **Duplicate Items** = items you've got 2 or more duplicate records for. Very useful to keep your library under control!
  - **Trash** = any items you delete go here before you finally decide to 'empty Trash' (right-click)



### More information on collections:

- New items are added to the collection you have selected.
- You can add items to multiple collections.
- You can create **sub-collections** within a folder. You can do this by
  - Right-clicking an existing collection
  - Dragging and dropping a collection onto another collection
- Re-name a collection: right click on the collection and select re-name.
- You can delete a collection. *NB this does not delete the items from Zotero: they will still be held in your Library and other collections.*

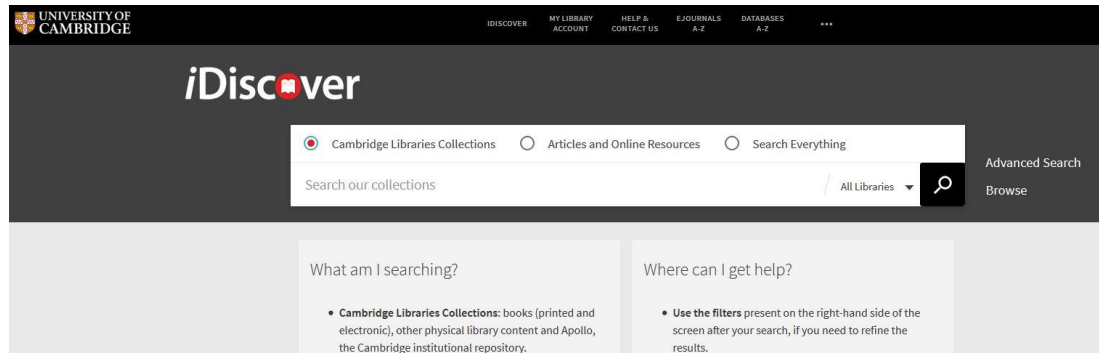




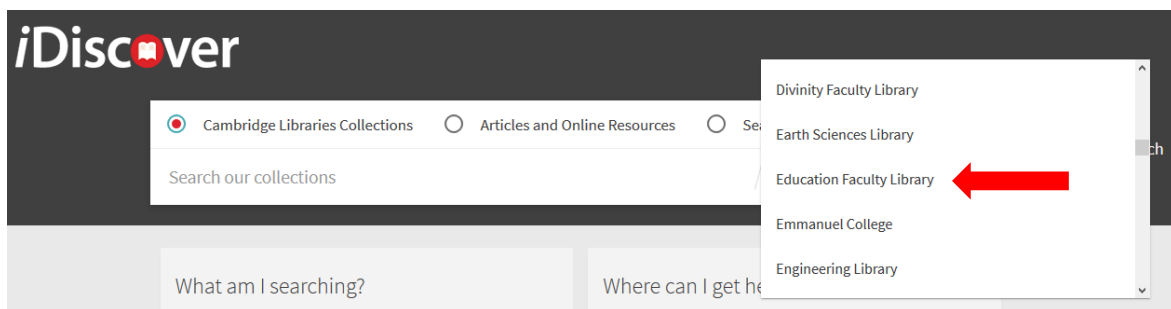
## STEP 7: Middle Column: Find & store references

Follow the steps below for a quick demonstration of how Zotero can gather references for you from the University of Cambridge Library catalogues.

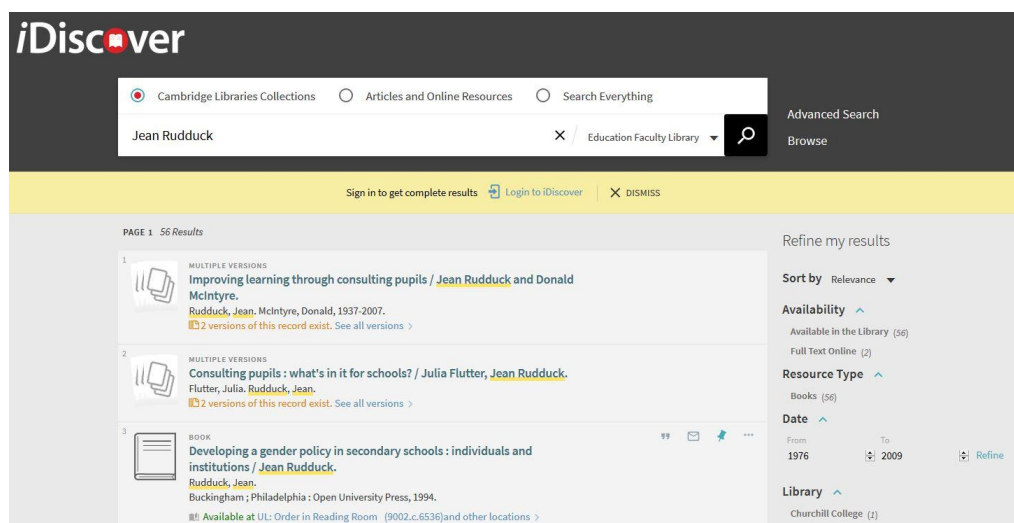
- Go to iDiscover: <http://idiscover.lib.cam.ac.uk/>



- Choose Education Faculty Library from the drop down menu 'All Libraries':



- In Search our collections type: Jean Rudduck (*the Faculty's late Professor Rudduck was a world-leading scholar – most notably in the field of pupil voice*). This search will produce a list of Jean's publications held in our Faculty Library:



- Refine your results: Sort by – Date-Newest (on the right hand side of page)
- Click on the title **Improving learning through consulting pupils**
  - This will reveal 2 results – click on the first (for the book)
- From the full record, copy the **ISBN** which is located in the ‘**Details**’ section (do not worry if what you see does not exactly match the screengrab below):


**Details**

**Title** Improving learning through consulting pupils / Jean Rudduck and Donald McIntyre.

**Author** Rudduck, Jean. >

**Other entry** McIntyre, Donald, 1937-2007. >

**Publisher** London : Routledge, 2007.

**Identifier** ISBN 9780415416153 (hbk.) :   
 ISBN 0415416159 (hbk.) :  
 ISBN 9780415416160 (pbk.) :  
 ISBN 0415416167 (pbk.) :

**Creation date** 2007

**Format** vi, 222 p. ; 22 cm.

**Subjects** [Effective teaching](#) >  
[Student participation in curriculum planning](#) >  
[Learning contracts](#) >

**Series link** ["Improving learning TLRP."](#) >

**Series title** [Improving learning TLRP.](#) >

**Series statement** [Improving learning](#) >  
[Improving learning TLRP](#) >

**Language** English

**Copy notes** Formerly CIP. Uk

- In Zotero, select the Wand Option and paste or type in the ISBN:

Zotero

File Edit Tools Help

Enter one or more ISBNs, DOIs, or PMIDs to look up in the box below.

ISBN 9780415416153

- Press return/enter on your keyboard. This will bring the details of the book into your Zotero Library:

Zotero

File Edit Tools Help

My Library

- Education & Technology
- Learning
- McIntyre Refs
- Morgan PhD Thesis Library
- Partnership Review
- AEI search results
- BEI search results

Title	Creator	Date Added	Info	Notes	Tags	Related
Improving learning through consulting pupils	Rudduck and McIntyre	06/10/2017, 14:4...	Item Type Book Title Improving learning through consulting pupils Author Rudduck, Jean Author McIntyre, Donald Abstract Series Improving learning TLRP			

- Now search for the following 4 publications by Professor Rudduck and repeat. Tip: you can add the work 'transfer' to 'Jean Rudduck' in the search box e.g.

The screenshot shows the iDiscover search interface. The search bar contains the text "Jean Rudduck transfer". Below the search bar, there are two search results. The first result is a book titled "The impact of school transitions and transfers on pupil progress and attainment / Maurice Galton, John Gray and Jean Rudduck." The second result is a book titled "Transfer and transitions in the middle years of schooling (7-14): continuities and discontinuities in learning / Maurice Galton, John Gray and Jean Rudduck; with Mary Berry ... [et al.]".

- *The challenge of Year 8: sustaining pupils' engagement*
- *Consulting Pupils: what's in it for schools?*
- *Transfer and transitions in the middle years of schooling*
- *Developing a gender policy in secondary schools*

- The items will now appear in your Zotero library!

The screenshot shows the Zotero library interface. A red arrow points to the top of the library list. The list contains several items, including "Developing a gender policy in secondary schools: individual...", "Transfer and transitions in the middle years of schooling (7-14): continuities and discontinuities in learning", "Consulting pupils: what's in it for schools?", "The challenge of year 8: sustaining pupils' engagement with...", and "Improving learning through consulting pupils".

- NB Faculty computers: if for some reason the ISBN identifier does not work and will not load some of these references into your library, do not worry (this seems to be an iDiscover bug):
  - Try searching for books in your topic area – see if the ISBN identifier works
  - Move on to the next step in this training guide

## STEP 8: Right Column: Check/Edit Individual Reference Information

- In the Zotero library **middle column**, click on one reference you have downloaded.
- In the Zotero right-hand column you will see all of the information required to produce a citation and additional information.
- Check through this information to ensure all details are correct and there is no information omitted or additional punctuation e.g.

**Consulting pupils : what's in it for schools? / Julia Flutter, Jean Rudduck.**  
(View availability)

Author(s): Flutter, Julia.  
Other entries: Rudduck, Jean.  
Published: London : RoutledgeFalmer, 2004.  
ISBN: 0415263042  
0415263050 (pbk)  
Series: What's in it for schools?  
Physical description: xii, 162 p. ; 21 cm.  
Subject(s): Communication in education -- Great Britain Case studies.  
Pupil attitudes.  
Student participation in administration -- Great Britain Case studies.  
Student participation in administration.  
Student participation in curriculum planning.  
Teacher pupil relationship.  
Teacher student relationship.  
Teacher-student relationships -- Great Britain Case studies.

Printed book

SHARE AND PRINT  
 ➤ Save or tag...  
 ➤ Export to RefWorks/Endnote  
 ➤ Export as BibTeX  
 ➤ Print record  
 ➤ Tweet record  
 ➤ Share record on Facebook

My Library  
 Trying out Zotero  
 Duplicate Items  
 Unfiled Items  
 Trash

Title	Creator	Date ...
Consulting pupils: what's in it for schools?	Flutter and Rudduck ...	7.10.15 1...
Developing a gender policy in secondary sc...	Rudduck	7.10.15 1...
Improving learning through consulting pup...	Rudduck and McL...	7.10.15 1...
The challenge of year 8: sustaining pupils' e...	Rudduck and Flutter ...	7.10.15 1...
Transfer and transitions in the middle years ...	Galton et al.	7.10.15 1...

Info Notes Tags Related

Item Type: Book  
 Title: Consulting pupils: what's in it for schools?  
 Author: Flutter, Julia  
 Author: Rudduck, Jean  
 Abstract:  
 Series: What's in it for schools?  
 Series Number:  
 Volume:  
 # of Volumes:

You can check the information against the LibrarySearch record to ensure that the correct information has been saved to Zotero.

Click on a label with an arrow to change the relationship.

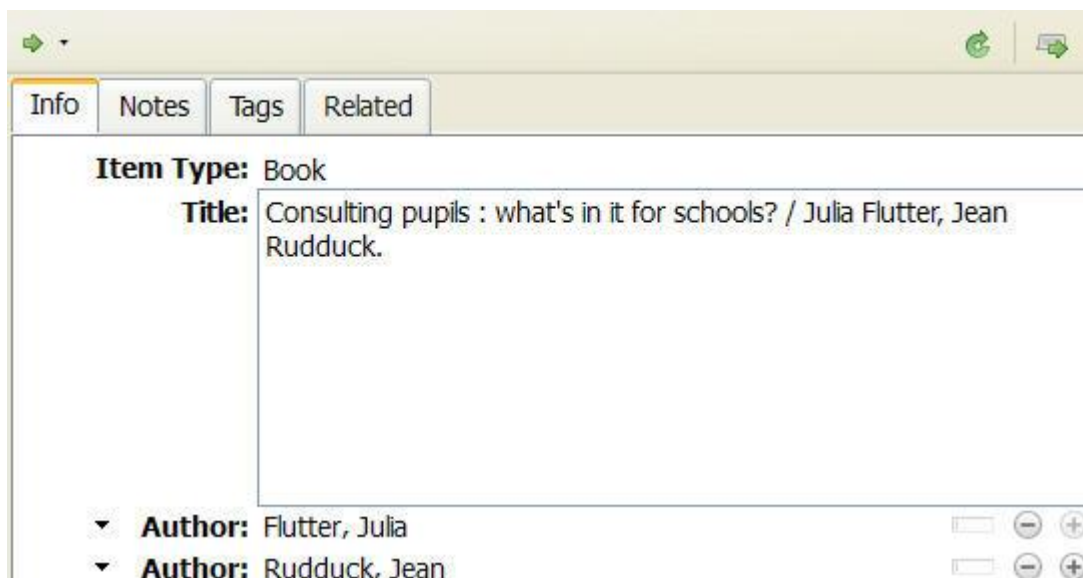
Author: Flutter, Julia

- Author
- Contributor
- Editor
- Series Editor
- Translator
- Move Down

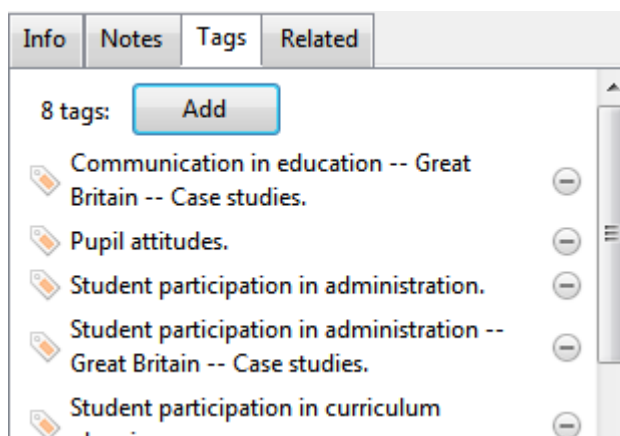
Click on text to edit.

- You can also edit names or delete information which is not essential.

- To edit a title (if necessary) **click on the title text** and a text box will appear:



- **Make your changes.** In this example, we delete the forward slash (/) and the authors' names.
  - **To close the text box,** click anywhere in the reference entry in the right hand column (anywhere other than the title). Your edit is saved.
- Take a moment to look through the information you can store about each reference in the right-hand column:
    - **Item Type:** click on this to reveal a drop down menu (handy for when you manually create a reference)
    - **Author:** click here to reveal a drop down menu (handy for when you need to use 'editor' etc.)
    - **Abstract:** you can type or copy and paste text into this section
    - **Notes Tab:** You can type or paste text here. Good for keeping track of your thoughts, key quotes etc.
      - Click on **Notes** then **Add** and type in some text. It will be attached to your reference – see the yellow 'post-it' icon.
    - **Tags Tab:** You can tag references with key words. Good for searching quickly through a large library.



- **Related Tab:** You can use this to link related items from your library e.g. a book review and a book.
  - You can only link items from the same library.
  - Click on **Related** and **Add** and link another reference in your list to 'Consulting Pupils'. This is a good way to remind you of links you want to make between items.
- *NB if you do find 'errors' or characters that need deleting in any references, the fault is not with Zotero but with the original database which Zotero has connected with. A quick check and edit will still save time compared with compiling references manually.*

### Key Principle

***Checking and manual editing of downloaded references is essential so that when you use Zotero to manage citations in your essays/thesis your references will appear correctly.***

## Section 2: Searching, Sorting, Creating Bibliographies & Reports

### STEPS 9 – 11

	<i>Completed</i>
9. Search a Database	<input type="checkbox"/>
10. Sort your references	<input type="checkbox"/>
11. Create a bibliography	<input type="checkbox"/>
12. Generate a report	<input type="checkbox"/>

## STEP 9: Search Databases for Articles

For the most efficient way to search the databases please use the 'Literature Searching' guide on the Library Moodle and follow all the advice from the librarians in their training sessions.

Go to Moodle [www.vle.cam.ac.uk](http://www.vle.cam.ac.uk)

- Login and click on 'Faculty of Education Library' and click on 'Literature Searching Guide' (under Library Guides).



- Click on 'Journal Articles'
- Select 'Databases – quick access'. For this example we will be using BEI (British Education Index) – so select the British Education Index tab.
- There are two ways of adding items from a database.
  - With the **Zotero Connector** for your Browser installed, you can add multiple items from a page of search results:

1. Click on the yellow folder to bring up the list of items on this page.

2. Select the items you wish to add to your collection.

3. Click OK to add.

- Adding articles this way will add them to the database record. It will also often add the abstract to your Zotero record.



- Try searching the BEI database now using key words for a topic you are interested in. Save some articles to your Zotero library.

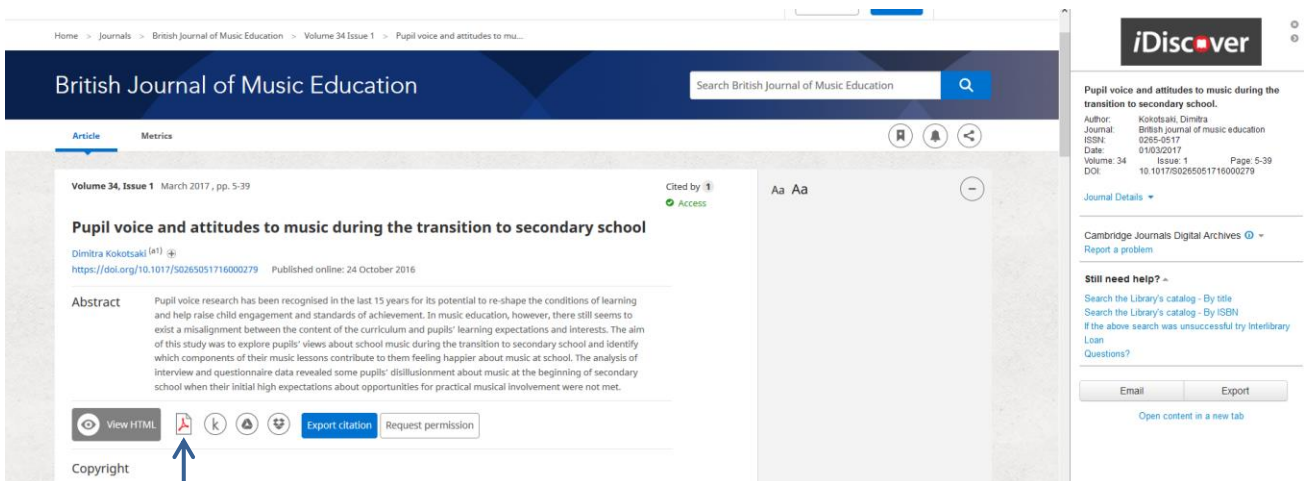
### Zotero Adding a single article including the PDF

- When you have found an article in a database that you want to read or add to your reference list, click on



... to see whether the University has access to the article.

- If you have access, you will be redirected to the article page.



- Click on the PDF download symbol on the page. The article will be viewable in your browser.
- Your Zotero Connector might also display a PDF icon – click on this and you can save the PDF to your Zotero library.

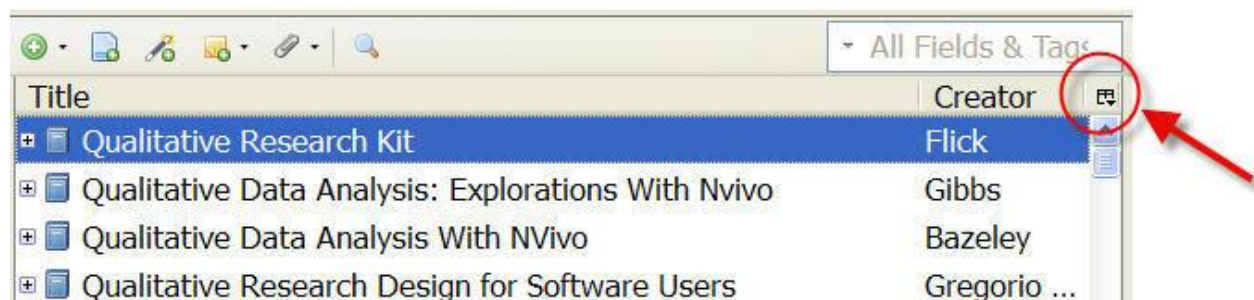


- To link the PDF to the article reference in your library, drag and drop onto the article (middle pane of your Zotero Library).

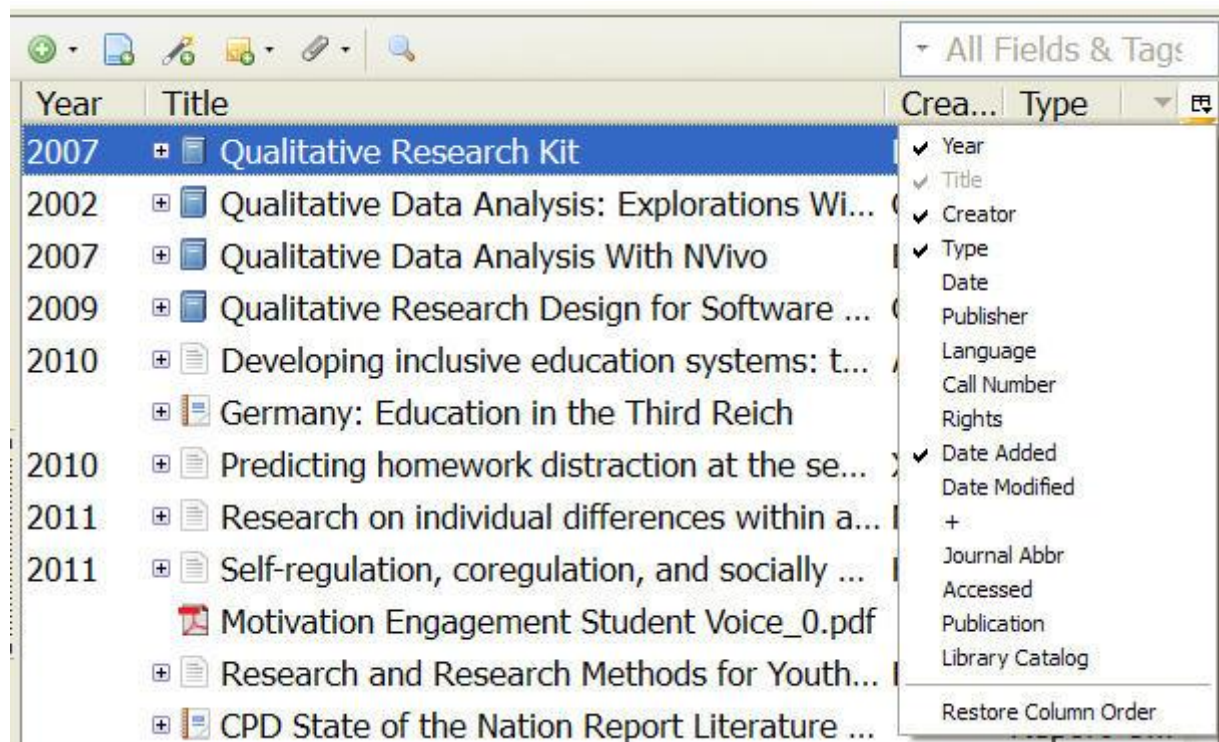
## STEP 10: Sort your references

Now that you have some references in your new Zotero library, learn how to sort them. Zotero has a number of features which help you to quickly sort and organise your references. Follow the instructions below to customise the middle column of your Zotero library beyond the default settings of title and author/creator.

1. Click the small **grid-like menu** on the top right of the middle column:



2. From the drop-down menu choose the additional column headings you'd like to set up (Tip: 'date added' is very useful for helping you to find recent additions to your library).

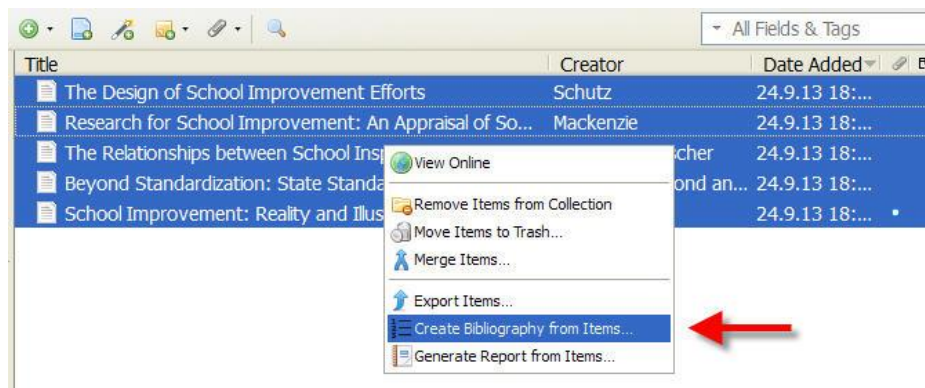


3. You can now sort your library using the new headings you've selected: click on any heading in the middle column to sort e.g. by year, author/title alphabetically (A-Z, Z-A), date added etc.

4. You can also create further **collections** and **sub-collections** to sort/organise your references further if you wish.

## STEP 11: Create a Quick Bibliography

1. Open up your Zotero library.
2. In the **middle pane**:
  - select all the items you want to include in your list (Keyboard **CTRL-A**)
  - or for non-contiguous (individual) items hold down **CTRL** (CMD on Mac) while you click your selection.
3. Right-Click your mouse (CTRL-Click on Mac) anywhere in your highlighted selection
4. Select the command: 'Create Bibliography from Items'

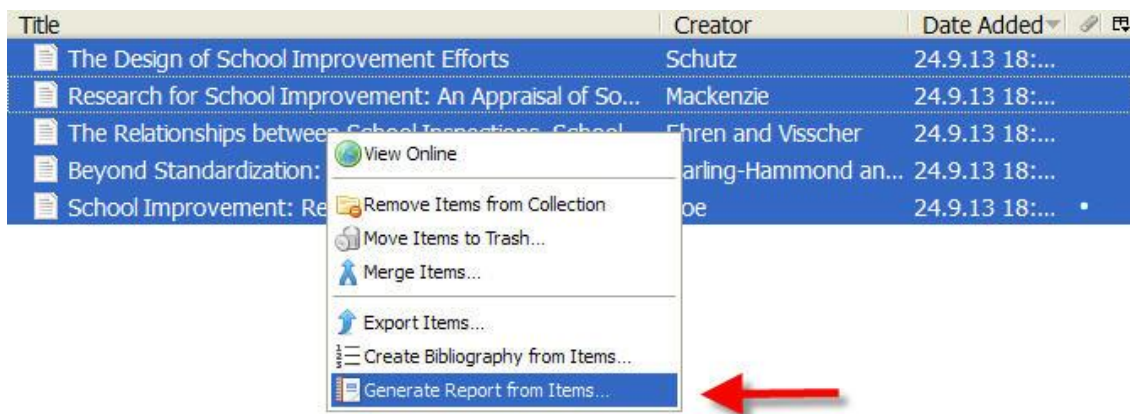


5. Select the **citation style**, **output mode** and **output method** from the next dialog box:
  - **Citation Style:** select **APA 7<sup>th</sup>** (or 6<sup>th</sup>)
  - **Output Mode:** select **Bibliography**
  - **Output Method:** select **Copy to Clipboard** and click **OK**
6. Open **Word** and create a new document:
  - **Paste** (Keyboard **CTRL+V** on PC, **CMD+V** on Mac/) your Zotero items into it
  - You now have a bibliography created in seconds.
  - If any references are displayed incorrectly, remember you need to edit them back in Zotero (see **STEP 8**) then repeat the steps above to 'create bibliography'. Any changes you make in your Zotero records will now be displayed.
  - You can use this feature to print your bibliography. **Tip:** *print out hard copies of your Zotero bibliography periodically as an extra back-up (useful if your computer breaks down, hard drive fails etc).*

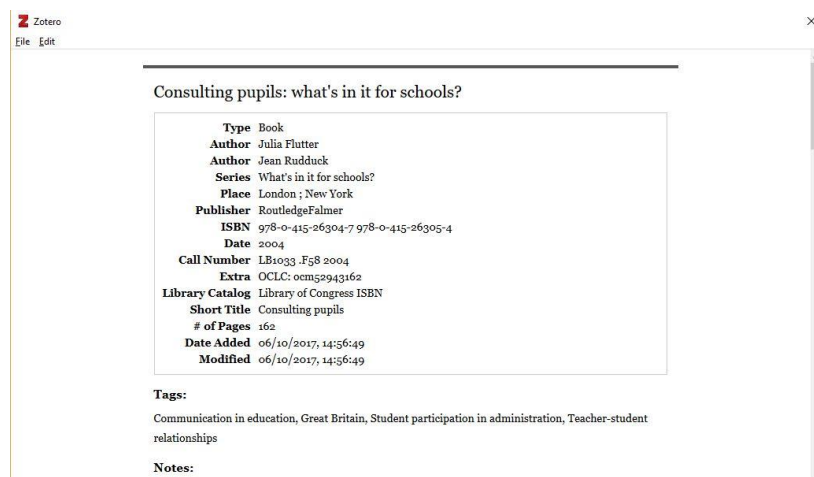
## STEP 12: Generate a report

The **'Generate Report'** command is very useful: Zotero will generate a report of all selected items in your library, including any notes you have attached to individual references (see **STEP 8**). The report can be saved as a web page and/or printed out. This can be very useful to support writing up literature reviews or sharing references with a research team etc.

1. Open your Zotero library.
2. In the **middle pane**:
  - select all the items you want to include in your list (Keyboard: CTRL-A)
  - or for non-contiguous items hold down **CTRL** (CMD on Mac) while you click your selection.
3. Right-Click your mouse anywhere in your highlighted selection to reveal the drop-down menu.
4. Select the command: **'Generate Report from Items'**



5. Zotero will now 'generate' a report for you in a new window. Each item you have selected will be displayed, along with any notes or tags you have attached to the items. You can save this report as a webpage or text:



## Section 3: Zotero & Word - Citations & Reference Lists

### STEPS 13 - 15

*Completed*

13. Use Zotero to insert a full citation into a document
14. Other Citation Types:
1. Author/s in sentence – date in brackets (Suppress Author)
  2. Two or more citations (multiple)
  3. Suffix added – page number
  4. Prefix and suffix added
15. Create a reference list from your citations

## STEP 13: Use Zotero to insert citations into a Word document

You will be expected to cite texts you read and compile a **reference list** of these citations in your course assignments (essays and dissertation). In this section you will learn how the Zotero Word plug-in can help you with this task. You will learn how to:

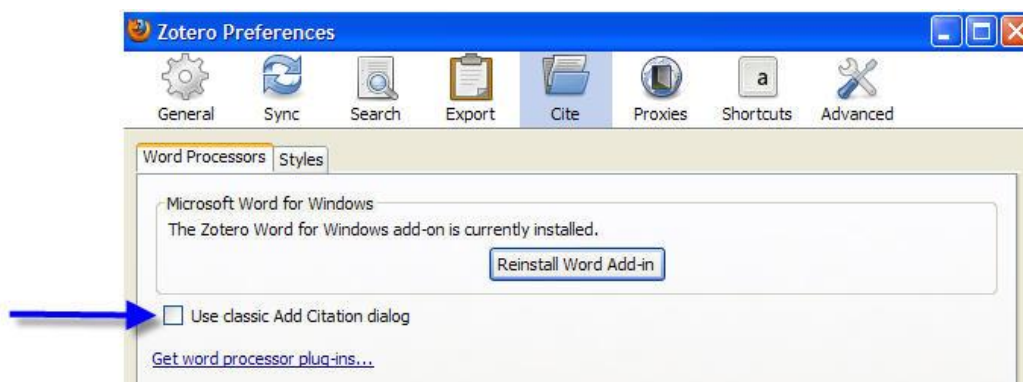
- insert different kinds of citations into a prepared Word document for you to practise using your Zotero library;
- create a reference list following the reference style APA 6 or 7 (as required by the Faculty) from the citations at one click of a button (saving you hours of typing!)

Before starting make sure:

- you have installed the Word plug-in (Step 3) and your Zotero library is open
- you have typed some sentences or a short paragraph on your research topic – a short piece of writing you can put some citations into.

### 1. Before you start: Sorted and Classic dialogs

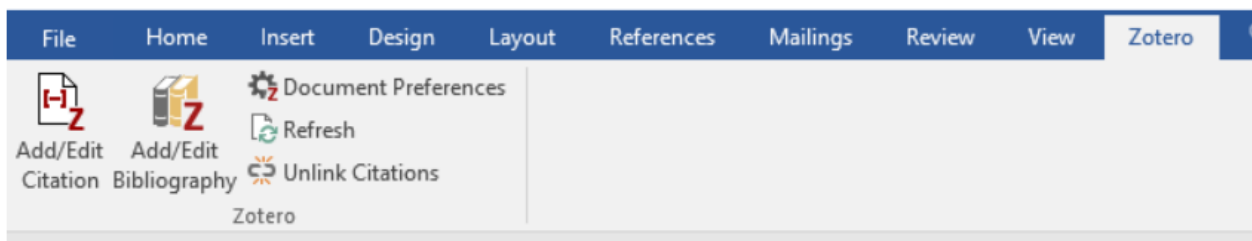
- Zotero gives you **2 ways** to insert citations from your Zotero library into a Word Document. You can choose between: Sorted dialog OR Classic dialog. The default mode is 'sorted dialog'.
- This guide will instruct you on how to use the **Sorted** dialog. You can try the Classic dialog by yourself later and decide which you prefer.
- You can set your preference to the classic by accessing the Cite tab in Zotero's Preferences – see STEP 5 – and checking the box:



- **TIP:** if you experience problems with the default 'sorted' dialog, switch to the Classic dialog.

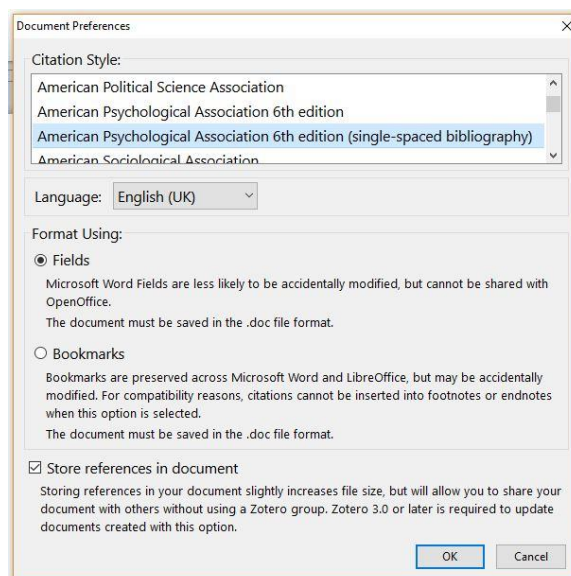
## 2. Inserting Citations with the Sorted Dialog (the Red Bubble)

- Make sure you have installed the Word plug-in (**see STEP 3**). Open Zotero.
- Open Word. Check the toolbar: You should see a row of Zotero icons. In Word 2007, 2010 and later they appear in **Add-Ins**:



These buttons allow you to manage Zotero citations in your Word documents.

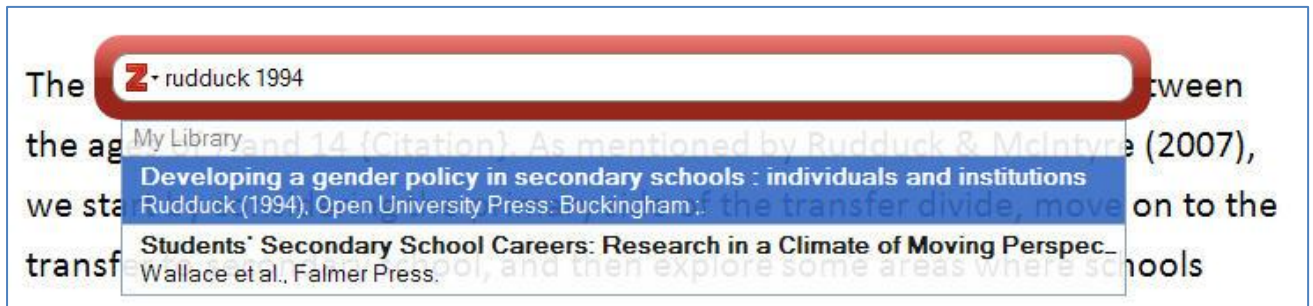
- *If you do not see them, try checking the “Templates and Add-ins” window.*
  - *Select “Tools” from the dropdown menu at the top of your screen, pull down to “Templates and Add-ins,” and make sure that the box for Zotero.dot is checked.*
- *If you see a warning message (upper left below the main menu) that macros have been disabled, click Options and enable these to permit the Zotero add-in to work.*
- To insert a reference from your Zotero library, Click the first button on the Zotero toolbar: “Zotero Add/Edit Citation”
- The Document Preferences window will open. Choose APA 7<sup>th</sup> or 6<sup>th</sup> Edition Citation Style from the list and click OK.
  - *If you would like to use a single-spaced style see Step 20 to learn how to install it.*



- The Zotero Bubble appears:



- Search for your reference by typing in this Bubble. You can search your library by author and date or type in words from the title e.g. Rudduck 1994



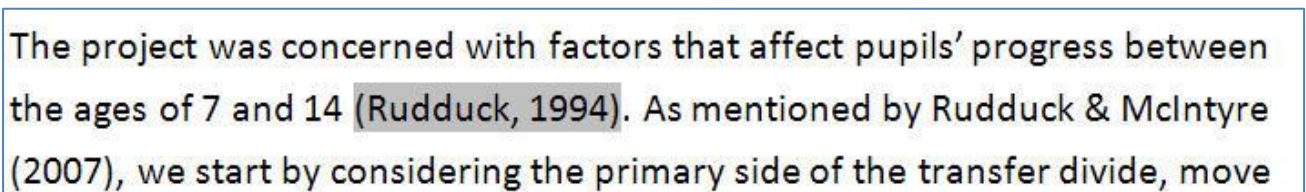
- or 'developing a gender policy':



- Choose a **reference from your library**. Click once on the title and the correct reference will appear in the bubble:



- Press return on your keyboard to insert the citation into your document. It should appear as follows in your text:



- You can tell your citation is 'live' (linked to Zotero) by placing the cursor within it – it will then appear 'greyed out' as in the above example.



- Move to **STEPS 14.1 – 14.4** to practise inserting and editing citations in your document, repeating the above basic steps with references of your choice that you have downloaded. You will learn how to insert and edit **4 more types of citations**:
- Author/s in sentence – date in brackets e.g. Rudduck & McIntyre (2007)
  - Two or more citations e.g. (Rudduck, 1976; Rudduck & Flutter, 2004)
  - Suffix added – page number e.g. (Rudduck, 1976, p.23)
  - Prefix and suffix added e.g. (see Flutter & Rudduck, 2004, for details)

## STEP 14.1: Author/s in sentence – date in brackets (Suppress Author)

- For STEP 12 you used Zotero to insert a full citation within brackets i.e. a citation containing Author + Date e.g.

*. . . pupils' progress between the ages of 7 and 14 (Rudduck, 1994).*

- If you name the author/s in your sentence then you need to **suppress** the author/s name/s in your citation e.g.

*Villarreal (2008) calls this transition the shift from . . .*

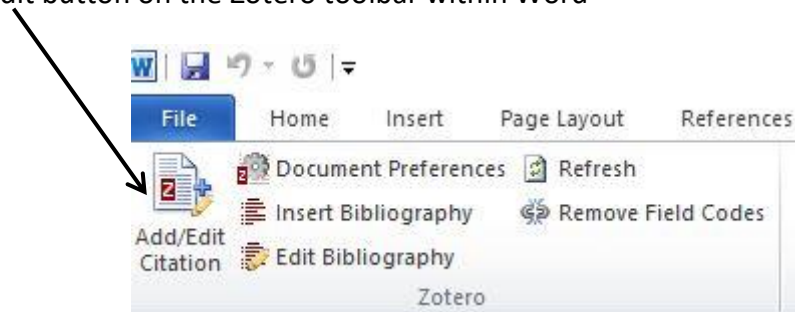
*Ruthven and Hennessy (2002) offered a model of . . .*

Zotero makes this easy to do via the **edit** button on the Zotero toolbar within Word.

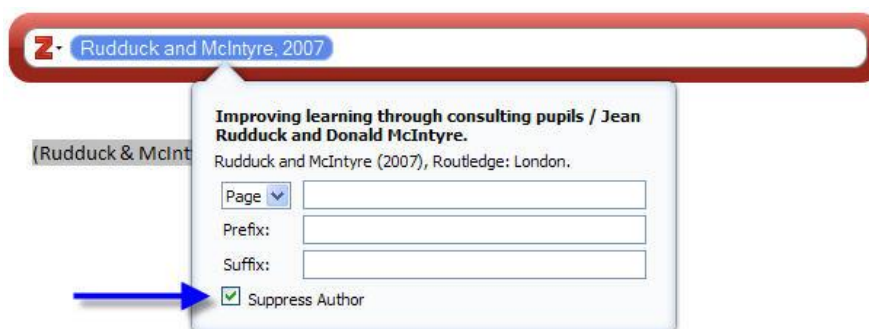
- Insert a citation following the same steps you took in STEP 12 so it first looks like this:

*As mentioned by Rudduck & McIntyre (Rudduck & McIntyre 2007) . . .*

- Place your cursor within the brackets of this citation to edit it.
- Click the edit button on the Zotero toolbar within Word



- Click on the citation when it appears in the Bubble dialog. This will open a box where you can edit your citation. For this step, check the box **Suppress Author**:



- Press return twice and your citation will now appear as date only e.g. (2007).

## STEP 14.2: Two or more citations (multiple)

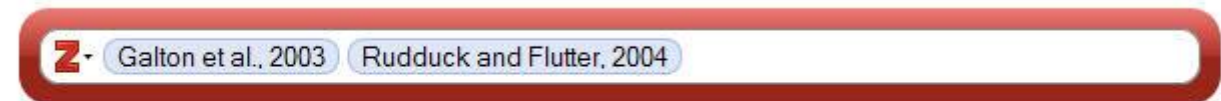
- Sometimes you will want to support or illustrate a point with two or more citations i.e. **multiple citations** e.g.

*... and the post-transfer period (Galton et al, 2003; Rudduck & Flutter, 2004).*

- Return to your Word Document. Follow the steps you learnt in STEP 12 to insert a citation. However, **do not press RETURN on your keyboard** until you have selected the two citations you need.
- Click on 'insert citation' on the Zotero toolbar.
- Search for a citation in the Zotero bubble and click once in the drop-down list to select it:



- After selecting the first item, don't press return. Type the **author, title, or year** of the second citation you want to select.



- Now press **RETURN** twice on your keyboard to insert your multiple citations in your document. Your citations will now appear within brackets and correctly separated by semi-colons:

*(Galton, Gray & Rudduck, 2003; Rudduck & Flutter, 2004)*

## STEP 14.3: Suffix added – page number

- If you quote from a source, you must provide the page number as a suffix along with author+date in your citation e.g.

*... between years within the same school (Galton, Gray & Rudduck, 2003, p.23).*

- Return to your Word document and insert a citation (follow steps for STEP 13). Once inserted, place the cursor within the citation. The citation will appear highlighted in grey:

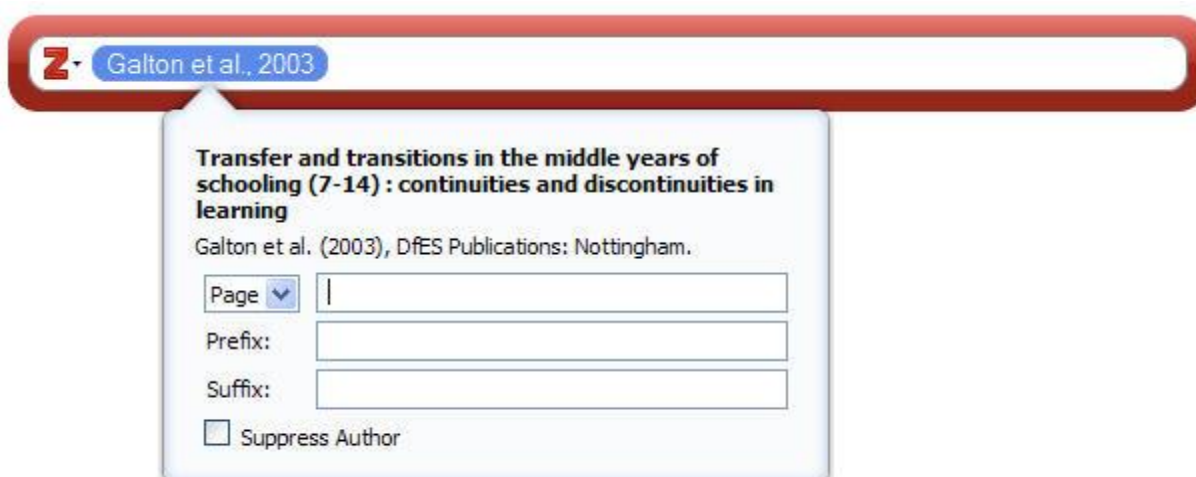
(Galton, Gray, & Rudduck, 2003)

- Click on the **Edit** button on the Word Zotero tool-bar to reveal the Zotero Bubble:

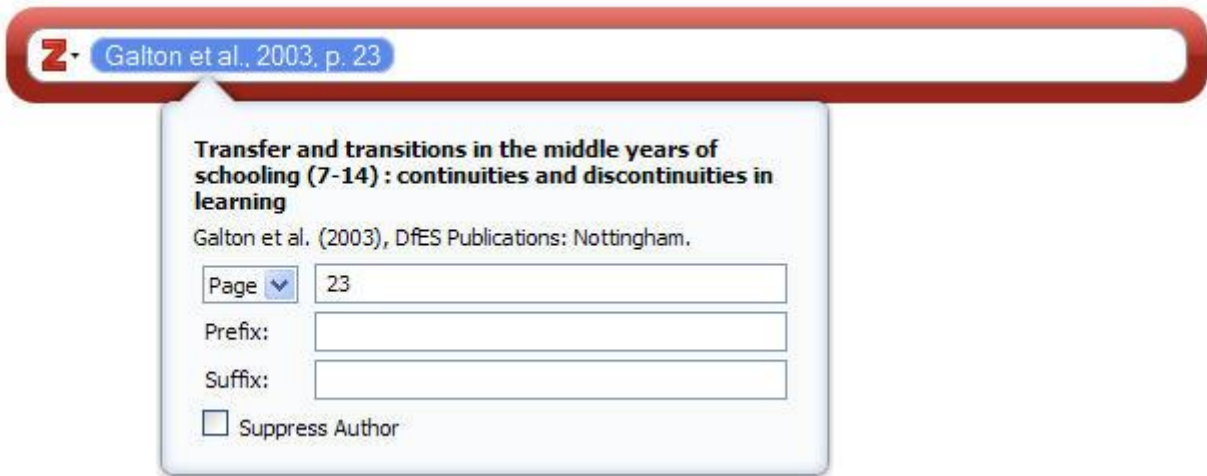
(Galton, Gray, & Rudduck, 2003)



- Click on the citation within the bubble to reveal the editing box:



- Type a page number into the first box. You will see the number appear in the citation in the Bubble:



- Press **Return** twice on your keyboard.
- Your citation will now appear in your document with page number added e.g.

*(Galton, Gray & Rudduck, 2003, p.23)*

## STEP 14.4: Prefix and suffix added

- You can use the Edit function to add further details to your citations as appropriate e.g. **prefixes** and **suffixes**:

(see Cooper & McIntyre, 1996 for details)

- Return to your Word Document.
- Use Zotero to add another citation to your paragraph e.g.

*Practice in more than 50 schools is described and analysed (see Flutter & Rudduck, 2004, for details).*

- Once inserted, place the cursor within the citation.
- Click on the **Edit** button on the Word Zotero tool-bar to reveal the Zotero bubble.
- Click on the citation to reveal the edit dialog box. Add prefix and suffix details (copy this example):

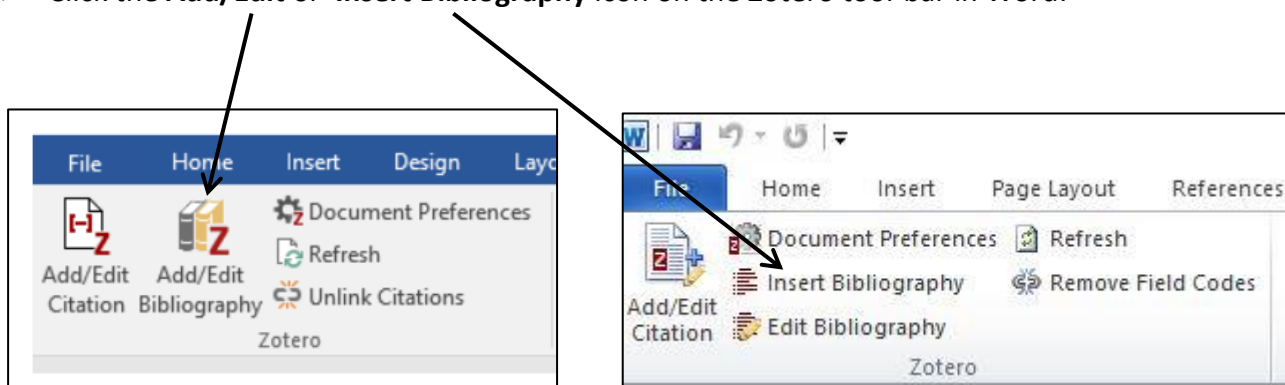


- Press **Return twice** on the keyboard.
- You will now see your citation with prefix and suffix details added e.g.

(see Flutter & Rudduck, 2004 for details)

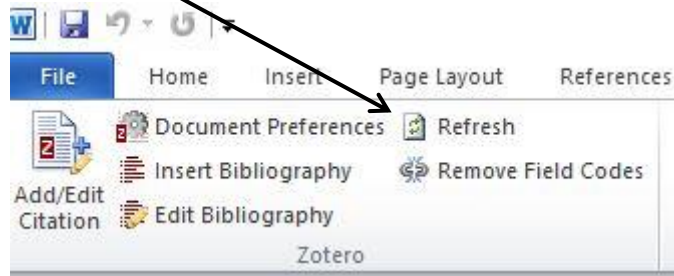
## STEP 15: Create a reference list from your citations

- You now have a number of citations in your document. Zotero can quickly create a reference list at the end of your document compiled from these citations.
- Return to your Word Document.
- At the end of your document, type in the heading **References**
- Place the cursor below this heading (on the next line).
- Click the **Add/Edit** or **Insert Bibliography** icon on the Zotero tool-bar in Word:



- Watch as Zotero quickly creates a list (in alphabetical order) compiled from all the citations in your document. Imagine this is one of your course essays or your dissertation!
- Zotero will update this list as you add more citations to your document. Try adding some more citations now. Click the **refresh** icon in the Zotero toolbar to update your list.
- **NB:** If any of the references in the list appear incorrect, have missing or unwanted extra punctuation/ information or strange symbols, **you will need to return to edit them within your Zotero library (see STEP 8).**
  - Any changes you make to the original references here (in the right-hand column of Zotero) will appear when you **refresh** your reference list back in your Word document.
  - A □ symbol in your Word references list is due to an extra/unwanted space back in the original reference entry within Zotero: delete the space to get rid of the symbol.
  - NB: when you generate a bibliography in Word using APA 6<sup>th</sup> as your output style, displayed references automatically include a DOI number (if available). You do not need to delete this information.

- To refresh your reference list in order to update changes you've made in your Zotero library, click on the **refresh** button on the Zotero tool-bar in Word:



- Your reference list in your document will now reflect your changes.

**Remember when working  
in Word to periodically  
save your work! Also check  
your punctuation after  
inserting/editing citations!**



**Section 4: Backing up, Syncing & Importing/Exporting**

**STEPS 15 – 17**

***Completed***

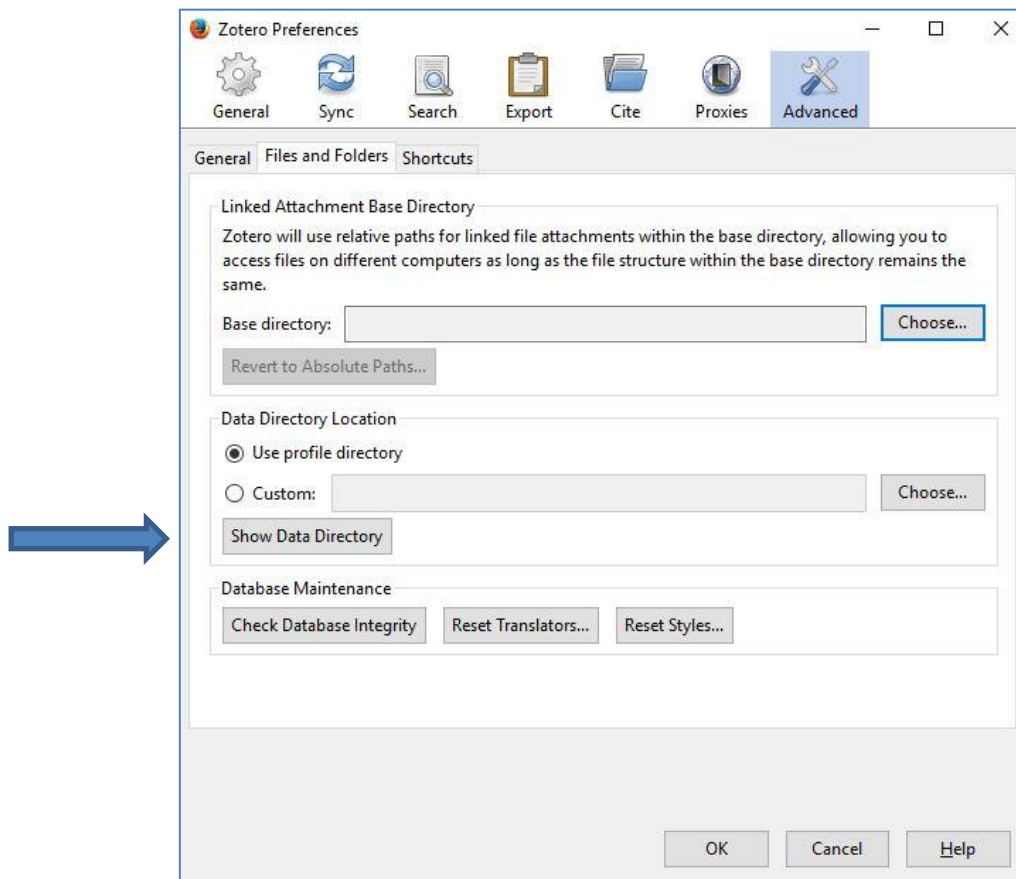
- |                                 |                          |
|---------------------------------|--------------------------|
| 16. Back up your Zotero Library | <input type="checkbox"/> |
| 17. Sync your library online    | <input type="checkbox"/> |
| 18. Import & Export References  | <input type="checkbox"/> |

## STEP 16: Back up your Zotero library

***We strongly advise you to learn how to back up your Zotero Library.***

*If your computer breaks down you will lose all your work if you haven't got a back-up plan. Use the following information to back up your Zotero library to an external hard drive/USB memory stick. For maximum safety – back up to two different places.*

- First, locate your Zotero Library, i.e. the data directory on your computer's hard disk where Zotero stores all your references: **go to Zotero Preferences – Advanced Tab (see STEP 5).**
- Click on the tab **Files and Folders**, then the button 'Show Data Directory'



- Now you can see the Data Directory. **NB: do not attempt to open any of these files/folders! They are not meant to be opened.**
- Before you proceed to copy from the Data Directory, **close your Zotero library and any browsers or programs you have open.** *This is essential to avoid errors/corrupting files.* But keep the window displaying your Data Directory open.
- Plug in an external storage device to your computer e.g. a USB thumb drive/memory stick.

- Create a new folder on your storage device e.g. 'My Zotero Backup October 2020'.
- Copy the files in your Zotero Data Directory to the new folder on your storage device: drag and drop etc.
  - If you have a large Zotero library then this can take some time . . .
- You now have a backup of your library. *If something goes wrong you can restore your Zotero library from this backup.*
- For a more detailed step by step illustrated guide to backing up Zotero see <http://libguides.northwestern.edu/content.php?pid=68444&sid=676064>

**For the full guide on backing up and restoring your library visit:**

[http://www.Zotero.org/support/Zotero\\_data#backing\\_up\\_your\\_Zotero\\_library](http://www.Zotero.org/support/Zotero_data#backing_up_your_Zotero_library)

## STEP 17: Sync your library online

- Zotero allows you to ‘sync’ i.e. synchronise your library on your computer with storage space provided by Zotero online.
  - This means you can access your Zotero library from any computer.
  - Zotero has two kinds of syncing:
    - Data Syncing (free, no storage limit)
      - Library items, notes, links, tags – everything except attachment files
    - File Syncing (300mb free with larger storage plans available for purchase)
      - Syncs attached files (PDFs, audio and video files, images etc).
- You can also share your library – great for collaborative research groups!
- **NB** – *you do not need to sync your library online to use Zotero on your computer.*
- For full updated details on how to ‘sync’:
  - <http://www.Zotero.org/support/sync>
- **Important advice from the Zotero developers (our emphasis)**
  - “We strongly recommend that you regularly back up your Zotero library. **Syncing is not a good substitute for backing up**: the Zotero server only stores the most recent version of your library, and it takes just a single (possibly automatic) sync to change the server copy.”  
  
[https://www.zotero.org/support/zotero\\_data](https://www.zotero.org/support/zotero_data)
  - If you accidentally delete something you didn’t mean to, or corrupt your data in some way, the problematic changes will overwrite the remote copy.

We therefore **strongly** advise you to keep backups on memory sticks or external hard drives in addition to using sync, or arrange a system to back up your entire hard disk automatically.

- Consult the following for advice on troubleshooting sync:

[http://www.Zotero.org/support/kb/sync\\_reset\\_options](http://www.Zotero.org/support/kb/sync_reset_options)

***Make sure you understand which way your files will be copied so that there is no danger of over-writing your latest version.***

## STEP 18: Import & Export References

You can transfer your Zotero library or a sub-collection within your main library using the 'export' and 'import' functions.

- Right-click (CTRL-click on Mac) on the collection you want to export. In the dialog box you can select either RIS or Zotero RDF Format.
- Save to your computer.
- Copy the exported file/s to a USB drive and then copy to another computer.
- From Zotero on the 2<sup>nd</sup> computer, click on **File** in the main menu and select 'Import'.
- Select the file you have just copied over and open it.
- Zotero will now import these references into your library on your 2<sup>nd</sup> PC. The library folder name will be 'Imported' plus the date. You can rename this as you wish (right-click on folder and 'rename collection').

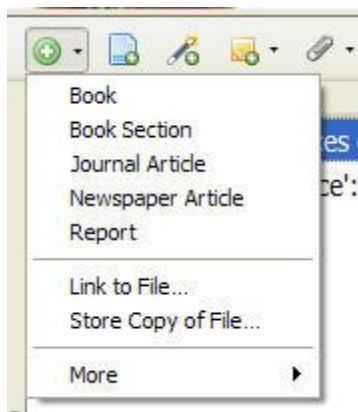
## Section 5: Further Features & Functions

### Steps 19 – 23

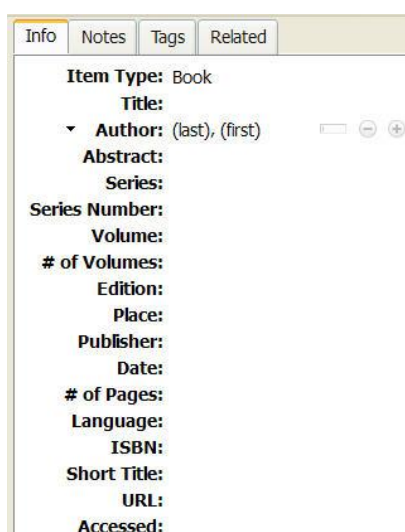
	<i>Completed</i>
19. Create a reference manually	<input type="checkbox"/>
20. Adding Citation Style APA 7 or 6 <sup>th</sup> Single Space	<input type="checkbox"/>
21. Attach a PDF file to a reference	<input type="checkbox"/>
22. View screencast tutorials	<input type="checkbox"/>
23. ZOTERO FAQ	<input type="checkbox"/>

## STEP 19: Create a Reference Item Manually

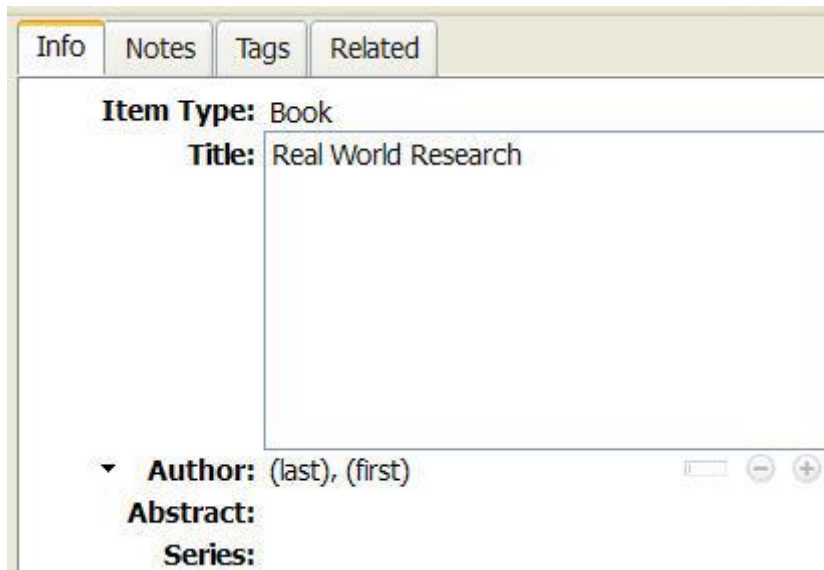
- The easiest way to collect references is to import them from online sources. For some kinds of material this may not be possible. In such cases Zotero allows you to create new references **manually**.
- Zotero will format your new item correctly if you pick the right type of document e.g. book, book section [chapter], or journal article as different kinds of document have to be set out differently in your bibliography.
- In this step you will create a reference for Colin Robson's book *Real World Research* published in 2006 in Oxford by Blackwell.
- Click the green plus icon in the Zotero menu bar. A drop down a list of possible types of reference will appear. *Real World Research* is a **Book**, so select that.



- Now look in the right-hand pane. You will see a corresponding blank item in the library listing.



- Click the **Title** field and type in: Real World Research.



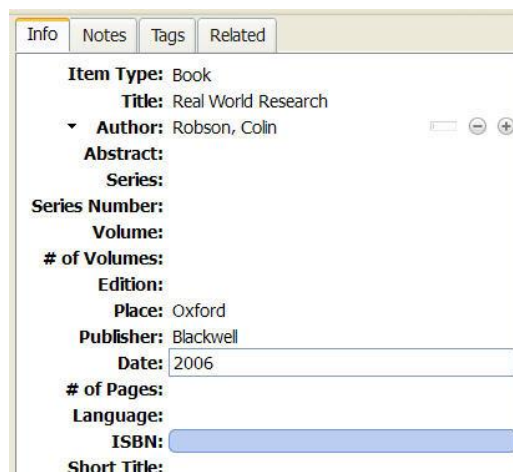
The screenshot shows the 'Info' tab of a Zotero item. The 'Item Type' is 'Book'. The 'Title' field is filled with 'Real World Research'. Below the title, the 'Author' field is labeled '(last), (first)' and is currently empty. Other fields like 'Abstract' and 'Series' are also visible but empty.

- Press Tab (on your keyboard) to skip to the next field: Author
- Enter the Author's name. Press tab to get from the last name slot to first name:



The screenshot shows the 'Info' tab of a Zotero item. The 'Item Type' is 'Book'. The 'Title' field is filled with 'Real World Research'. The 'Author' field is filled with 'Robson, Colin', with 'Colin' highlighted in blue. Other fields like 'Abstract' and 'Series' are also visible but empty.

- Continue filling in the slots for which you have information: **Place** and **Publisher** and **Date**.



The screenshot shows the 'Info' tab of a Zotero item. The 'Item Type' is 'Book'. The 'Title' field is filled with 'Real World Research'. The 'Author' field is filled with 'Robson, Colin'. The 'Place' field is filled with 'Oxford'. The 'Publisher' field is filled with 'Blackwell'. The 'Date' field is filled with '2006'. Other fields like 'Abstract', 'Series', 'Series Number', 'Volume', '# of Volumes', 'Edition', '# of Pages', 'Language', 'ISBN', and 'Short Title' are also visible but empty.

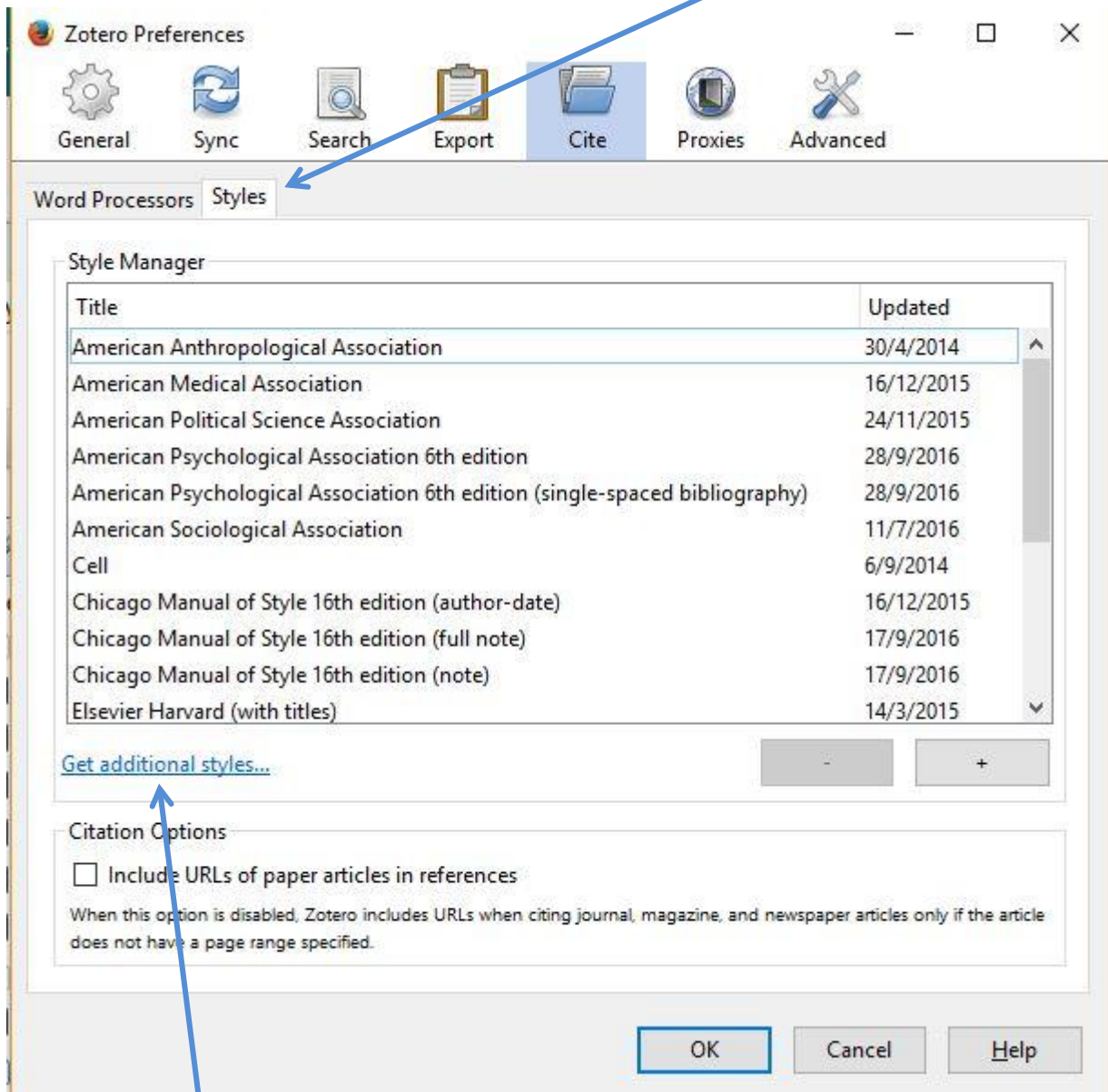
- Don't worry if some have to be left blank: Zotero provides fields for most eventualities and not every reference will use them all.



## STEP 20: Adding Citation Style APA 7<sup>th</sup> Single Space

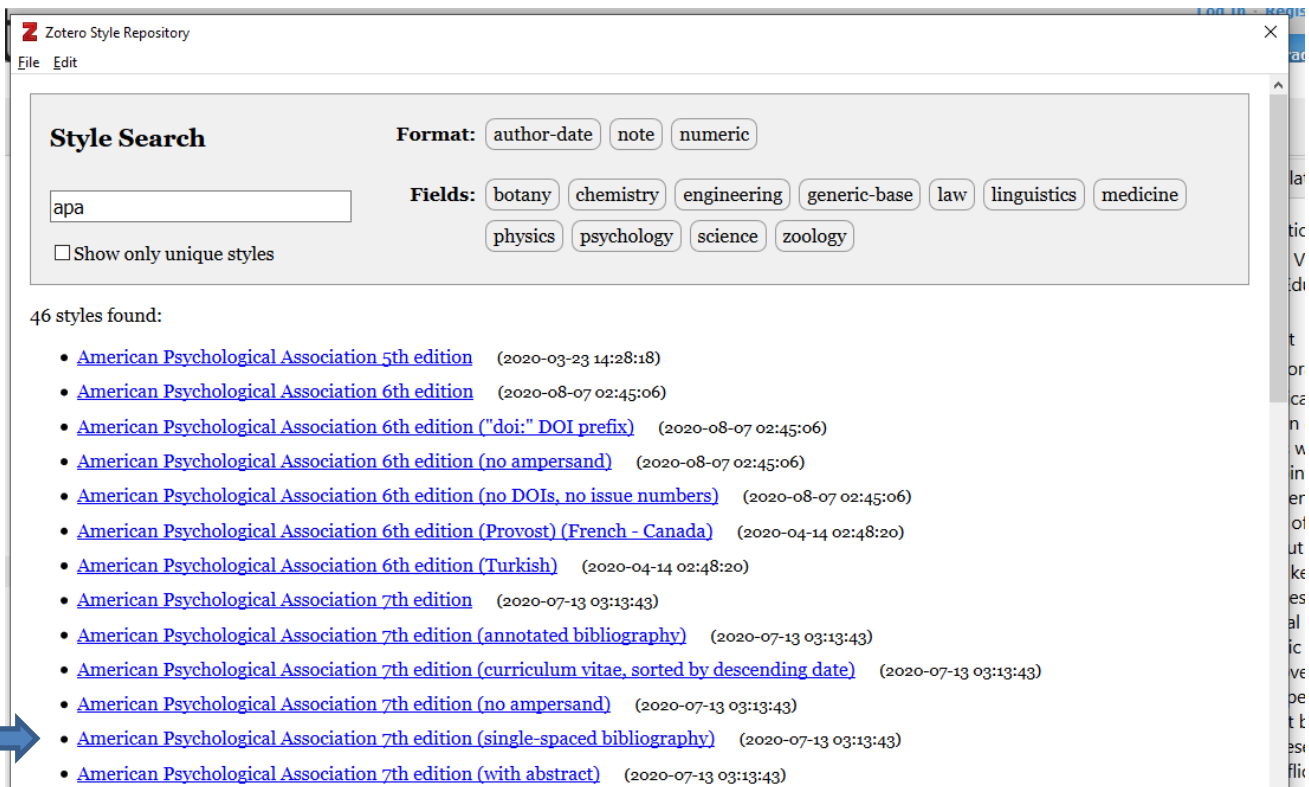
If you prefer to have your reference list at the end of your essays/thesis single rather than double-spaced, you can install the APA 7<sup>th</sup> Single Space citation style.

- Open Zotero and go to **Cite** in the Preferences. Select the tab **Styles**:



- Click on **Get additional styles** . . .

- This will open up a new window.
- Put 'apa' in the Style Search box and click on APA 6<sup>th</sup> (single-spaced bibliography)



The screenshot shows the Zotero Style Repository website. The search bar contains 'apa'. The 'Format' section has buttons for 'author-date', 'note', and 'numeric'. The 'Fields' section has buttons for 'botany', 'chemistry', 'engineering', 'generic-base', 'law', 'linguistics', 'medicine', 'physics', 'psychology', 'science', and 'zoology'. A checkbox for 'Show only unique styles' is present. Below the search bar, it says '46 styles found:' followed by a list of 12 links, each with a date and time stamp. A blue arrow points to the link 'American Psychological Association 7th edition (single-spaced bibliography) (2020-07-13 03:13:43)'.

46 styles found:

- [American Psychological Association 5th edition](#) (2020-03-23 14:28:18)
- [American Psychological Association 6th edition](#) (2020-08-07 02:45:06)
- [American Psychological Association 6th edition \("doi:" DOI prefix\)](#) (2020-08-07 02:45:06)
- [American Psychological Association 6th edition \(no ampersand\)](#) (2020-08-07 02:45:06)
- [American Psychological Association 6th edition \(no DOIs, no issue numbers\)](#) (2020-08-07 02:45:06)
- [American Psychological Association 6th edition \(Provost\) \(French - Canada\)](#) (2020-04-14 02:48:20)
- [American Psychological Association 6th edition \(Turkish\)](#) (2020-04-14 02:48:20)
- [American Psychological Association 7th edition](#) (2020-07-13 03:13:43)
- [American Psychological Association 7th edition \(annotated bibliography\)](#) (2020-07-13 03:13:43)
- [American Psychological Association 7th edition \(curriculum vitae, sorted by descending date\)](#) (2020-07-13 03:13:43)
- [American Psychological Association 7th edition \(no ampersand\)](#) (2020-07-13 03:13:43)
- [American Psychological Association 7th edition \(single-spaced bibliography\)](#) (2020-07-13 03:13:43)
- [American Psychological Association 7th edition \(with abstract\)](#) (2020-07-13 03:13:43)

- APA single-spaced will now be available in **Cite – Styles – Style Manager** in your Zotero Preferences.

*NB at the time of updating this guide (October 2020) there was no APA 6<sup>th</sup> single-spaced style available.*

## STEP 21: Attach a pdf file to a reference

Zotero allows you to attach a downloaded file to a reference in your library. *To complete this you will need to have some PDF files on your computer.* If you don't have any, go to an online journal and download a PDF file of an article you are interested in reading.

- Look at the menu bar at the top of the Zotero pane. Roughly at the centre, you'll see a paperclip icon.
- Click on a reference in your library (middle pane) and then the paper clip: from the pop down menu select "attach stored copy of file".
- Browse to your documents folder and select a PDF that you have saved e.g. a paper downloaded from a journal.
- Click Open.
- Click the small plus sign or arrow beside the reference in Zotero: you will see a pdf icon attached to the reference data.
- Your downloaded PDF has been copied to your Zotero Data directory.
- Right-click (CTRL-click on Mac) the PDF link in Zotero and choose "Rename File from Parent Metadata" to give the PDF a more meaningful name.

## STEP 22: View Screencast Tutorials

Zotero has many more useful features. For example:

- Highlighting and Annotation
  - Creating items from webpages
  - Notes
  - Timeline
  - Retrieve metadata from PDF
- Learn more about how to use these features by watching video tutorials on the Zotero website (youtube is also worth searching):

[http://www.Zotero.org/support/screencast\\_tutorials](http://www.Zotero.org/support/screencast_tutorials)

## STEP 23: ZOTERO FAQ

For full FAQ go to the developers' site at:

[http://www.Zotero.org/support/frequently\\_asked\\_questions](http://www.Zotero.org/support/frequently_asked_questions)

All key questions with the latest information are answered on this site.

### 1. Transferring/copying references using the Export and Import functions

You can transfer your Zotero library or a sub-collection within your main library using the 'Export' and 'Import' functions.

- Right-click (CTRL-click on Mac) on the collection you want to export. In the dialog box you can select either RIS or Zotero RDF Format.
- Save to your computer.
- Copy the exported file/s to a USB drive and then copy to another computer.
- From Zotero on the 2<sup>nd</sup> computer, click on the gear wheel in the tool bar and select 'Import'.
- Select the file you have just copied over and open it.
- Zotero will now import these references into your library on your 2<sup>nd</sup> PC. The library folder name will be 'Imported' plus the date. You can rename this as you wish (right-click on folder and 'rename collection').

### 3. My school IT Dept/work are going to upgrade my school/work laptop system. What should I do?



Reinstalling your system software or upgrading to new software will WIPE YOUR ZOTERO LIBRARY FROM YOUR HARD DRIVE. ☹️

- Make sure you have backed up your library (see STEP 15) onto a USB pen drive/another computer **before** your laptop is serviced. You can then reinstall it.
- Also generate a report (STEP 12) and
- Print your bibliography (STEP 11) to ensure you have a paper/hard copy back up of your library and attached notes. If disaster strikes, you can scan this back into a PC using scanning/optical character recognition (OCR) software.

#### **4. Why won't Zotero download references from some databases correctly? What is the problem?**

Also see information about manually correcting records. An example of this problem is when an author is assigned as a 'contributor' etc. This is an issue with something called 'translators'. Zotero is set up to 'scrape' all the information it can from a library record. The way the library records are set up in the database determine how Zotero will record the details. Annoying as this issue is, it is still quicker to do some editing in Zotero than manually entering all your references from scratch. For further information or to ask the developers questions, check out the extensive Zotero support Forums!

<https://forums.zotero.org/>

#### **5. Is Zotero compatible with EndNote?**

Zotero libraries can be exported and imported into Endnote. Similarly Endnote libraries can be exported and imported into Zotero. For instructions, go to:

[http://www.Zotero.org/support/kb/importing\\_records\\_from\\_endnote](http://www.Zotero.org/support/kb/importing_records_from_endnote)

## 6. You didn't answer my question!

The Zotero forum <http://forums.zotero.org/> is a really friendly place, and more than likely somebody will answer your question!

## Section 6: What else can you do?

### STEPS 24 – 31

	<i>Completed</i>
24. A reflection	<input type="checkbox"/>
25. ZotFile	<input type="checkbox"/>
26. Tagging	<input type="checkbox"/>
27. Smart searches	<input type="checkbox"/>
28. My publications	<input type="checkbox"/>
29. Shared libraries	<input type="checkbox"/>
30. Zutilo	<input type="checkbox"/>
31. Closing reflection	<input type="checkbox"/>



## STEP 24: A reflection

The Faculty teaches Zotero to all students on research-related programmes. However, some students do not take it up. This may be to do with the fact that “referencing doesn’t seem like a big deal” and it is just as easy to do “by keeping the papers in folders, and maintaining the bibliography by hand”.

Part of this may be to do with the misconception that using using Zotero just means “having to type references into Zotero” rather than “typing them straight into the thesis”. Of course, if that was it, then that’s right: there would not be much difference. However, you learned above about the browser connector, which means you do not have to type references into Zotero — most of the time they arrive. Moreover, while you know the reference format for your thesis, you should be thinking about publishing your work, and this may require different formats. But even then, maybe you just want to get the thesis out of the way and then think about the rest of your academic life!

Now, perhaps it will surprise you that one of the present guide authors (Bjoern) uses Zotero almost every day, and that this use is not at all about references and citations, but about developing and organising ideas, and growing those ideas into feasible research projects.

As your own reflection, make a list of positives, negatives, and interesting points about using Zotero. You’ll revisit this list at the end of this section.

## STEPS 25–30

We'll take a slight different approach for these steps. You've already encountered many features of Zotero, and know your way around. So we'll give fewer instructions, but nevertheless expect you to follow the instructions in the steps.

**25. ZotFile.** Visit and read the ZotFile site (<http://zotfile.com/>). What is ZotFile? What does ZotFile do? Install ZotFile into your Zotero; pick an item in Zotero that has a PDF, annotate that PDF, and extract the annotations with ZotFile. This is a really powerful feature, that you must learn. If you want to read papers on your tablet, you can also explore the 'send to tablet' function.

**26. Tagging.** Another powerful feature of Zotero is the ability to add tags, and therefore organisation your items across Zotero collections. Locate the 'tags' tab in Zotero (top right). Add a tag to a paper. Where do you see existing tags? (Answer: bottom right.) Now assign a keyboard shortcut to your tag, and use it to tag several papers. Do you see the little colours square appear? Helpful, right?

**27. Saved searches.** Saved searches allow you to, well, save a search. Create a new saved search. You can search for many different attributes of your items, but one of the most interesting ways to use a saved search for a specific tag. Set up a saved search for the tag you created earlier. Observe how items appear/disappear from the saved search as you tag/untag items.

**28. My publications.** Follow the instructions here [https://www.zotero.org/support/my\\_publications](https://www.zotero.org/support/my_publications) to set up a 'my publications' page. Add a few publications, and share the page with a fellow student.

**29. Shared libraries** are one of the most powerful features of Zotero. They allow you to do everything you have been doing with Zotero so far, but to do this in a team. They allow you to collaborate on literature research. They allow you to share interesting papers. They allow you to share progress with your supervisor. Team up, with each team having at least one person who is already experienced in Zotero. That person creates a new shared library on the Zotero website (see instructions here: <https://www.zotero.org/support/groups>), and then invites the others to that group. Decide on a topic you'll research, and add items to the shared library. Items should synchronise automatically, but synchronisation can be sped up by using the 'sync button'.

**30. Zutilo** (<https://github.com/willsALMANJ/Zutilo>) is another really helpful plugin — if you like keyboard shortcuts. Install the plugin and explore some of the new keyboard shortcuts to make your life easier.

## **STEP 31: Closing reflection**

Earlier you made a list of positives, negatives, and interesting points about using Zotero. It's now time to revisit this list. How does the list compare to what you learned in the previous steps? Did you discover new things in the previous steps? Was there anything that surprised you?

See whether you want to amend a few points on your list or whether can add to your list. Then meet with another student or a small group of students to compare your lists.