

Introduction to Zotero



Zotero 7 for Windows

Your personal research assistant

[Download \(64-bit\)](#)

Also available: [Windows ARM](#)

[Installation Help](#)

Other versions ^



Zotero Connector

Save from your browser with a single click

[Install Chrome Connector](#)

Zotero Connectors for other browsers ^

Install Zotero

1. Download and install **Zotero** for Windows, Mac or Linux.
2. Also install the **Connector** for the browser you use.

Zotero Connectors for other browsers v



Firefox Connector



Edge Connector



The Zotero Connector for Safari is bundled with Zotero. You can enable it from the Extensions pane in the Safari settings.

If you're unable to install an extension in your browser, you can save web pages or identifiers to your library from [this page](#) or with the magic wand button from [your web library](#).

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Zotero

- Free application for storing and organizing references.
- Maximum 300 MB free storage. You must pay if you need more space.
- Works with **Word** and **Google Docs**
- Good for **collaborative** writing
- **Help?** See **support**: <https://www.zotero.org/support/>
- **Download**: <https://www.zotero.org/>

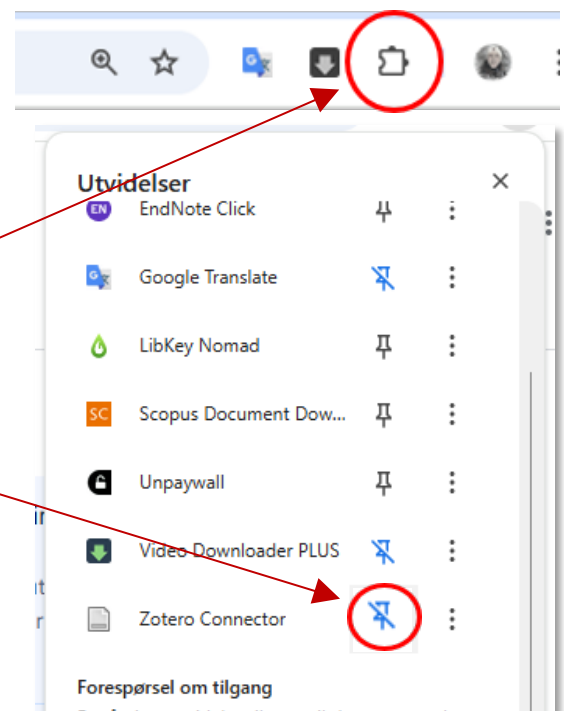
Checklist before you start

Is the Zotero Connector installed and visible in your browser?

The Zotero Connector icon will change depending on document type:



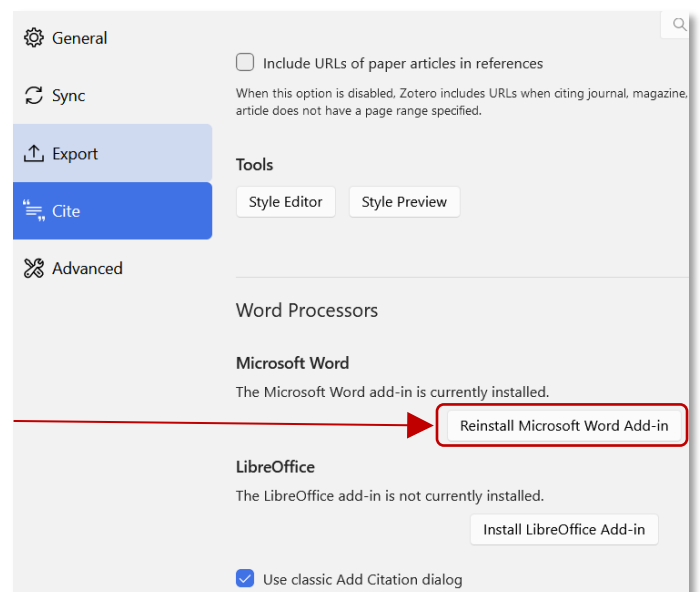
1. If **not** visible, check if it is “**pinned**” (festet) to your browser.
 - Klick **Extensions** and **Pin it**
2. If **not** visible among Extensions at all:
In Zotero:
 - **Tools > Install browser connector...**



Is the Zotero-tab visible in Word?

If not:

1. Close and **restart Word**
2. If still not visible:
In Zotero:
 - **Edit > Settings > Cite > Reinstall Microsoft Word Add-in**
(Rediger > Innstillinger > Henvis)

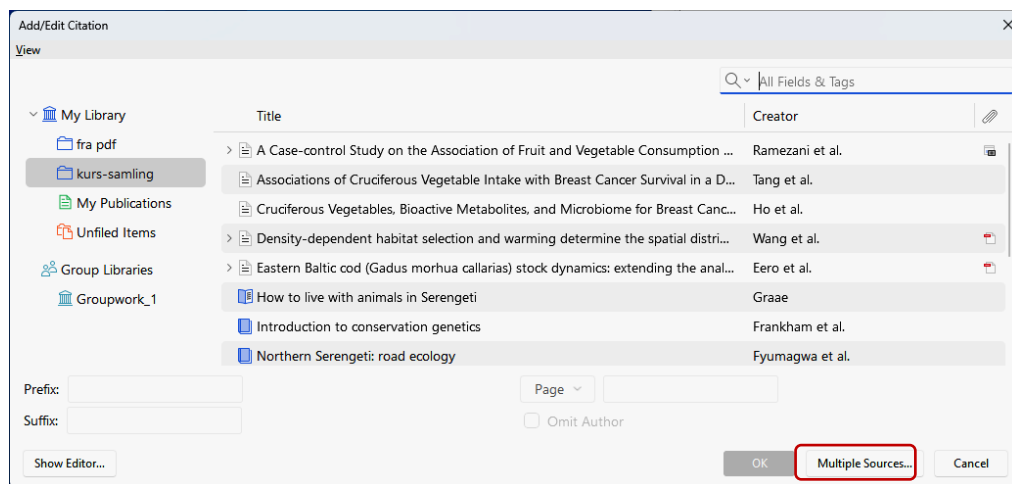


Recommended settings

When you add citation in Word, Zotero will display the following red box (line), and you can start typing to find the reference you want:



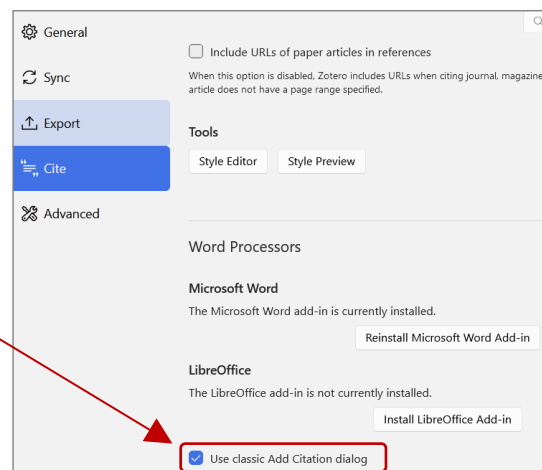
You can change this, so it shows a “**classic dialog box**” instead (under). Then you can see and choose references yourself. Click **Multiple Sources...** to pick more than one.



Classic dialog box

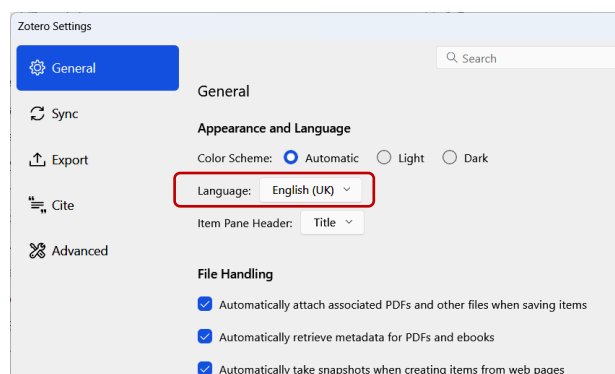
Change to Classic dialog box:

- In Zotero:
Edit > Settings > Cite
Mark **Use classic Add Citation dialog**



View Zotero in English or Norwegian (or any other language)

- **Edit > Settings > General**



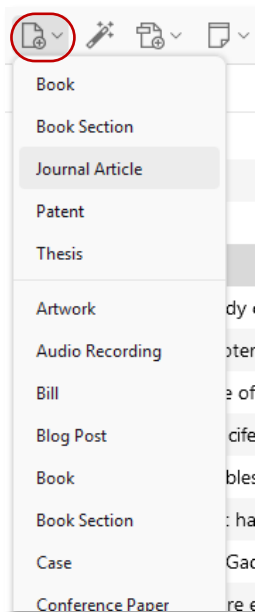
Add references to Zotero

Different ways to add references into your Zotero library:

1. **Manually** add references
2. Use the Zotero **Connector** to add references
3. Add references by **Identifier** (Magic wand): (Enter DOI, ISBN PMID, arXiv ID)
4. **Drag and drop PDF-files** into your library
5. (Without the connector, **export** from databases as Oria, Scopus, Web of Science... and save them as a file in the **RIS-format**. Then open the file in Zotero).

1. Manually add references

File > New Item (or ) and choose which **Item type** you will add.



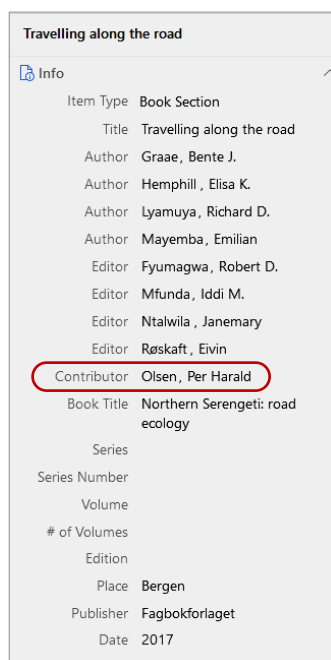
For a **Journal Article**, add:

- **Title**
- **Author(s)** (One author on each line)
- **Publication** (= name of journal)
- **Volume**
- **Issue** (if available)
- **Pages**
- **Date** (= year published)

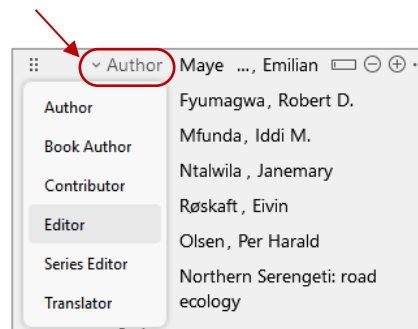
For a **Book**, add:

- **Title**
- **Author(s)**
- **Edition** (if available)
- **Place** (where published)
- **Publisher**
- **Date** (= year)

Books with editors will have authors for each chapter. Then we refer to the chapter we are citing. Use **Item type Book Section**:



Click on **Author** for more choices



Photos are taken by Per Harald Olsen, and is added as a **Contributor**

A reference to this **book chapter** in the APA 7 style:

Graae, B. J., Hemphill, E. K., Lyamuya, R. D., & Mayemba, E. (2017).
Travelling along the road. In R. D. Fyumagwa, I. M. Mfunda, J. Ntalwila,
& E. Røskaft (Eds), *Northern Serengeti: Road ecology*. Fagbokforlaget.

2. Use the Zotero Connector

With the Connector you can add references easy from any place on internet.



Article



Book



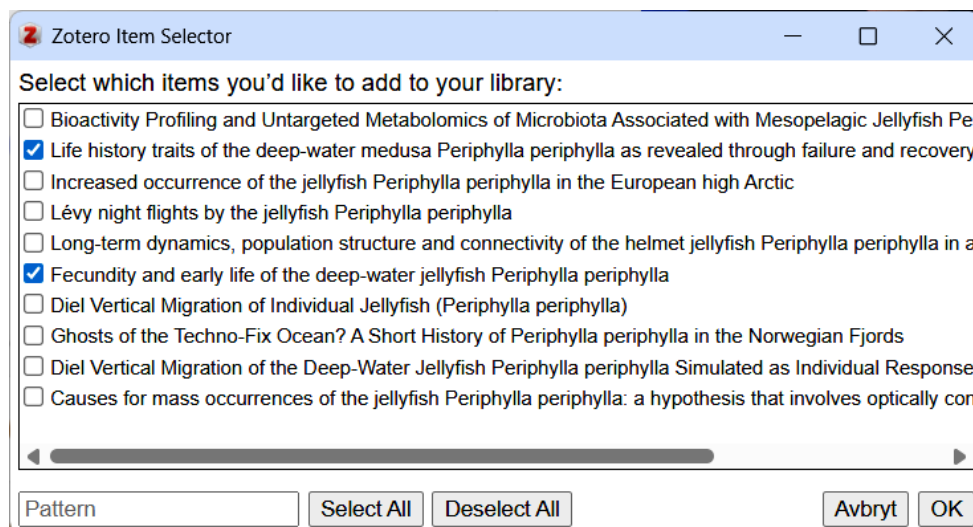
Webpage



List of sources

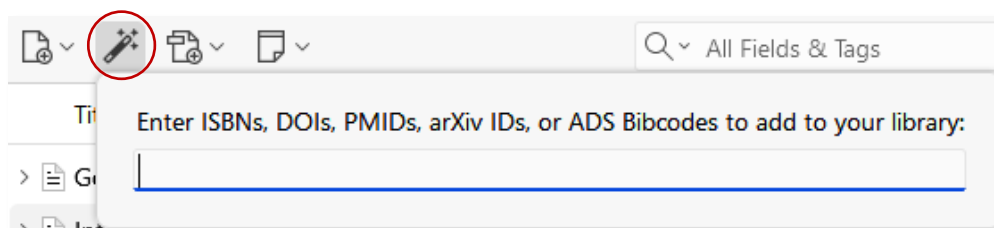
After a search in any databases like Oria, Scopus, PubMed, Web of Science, Google Scholar... etc. you can easily export references from the results by clicking the Connector.

A sample: after clicking the Connector  this box will show and you can choose the references you want to transfer to Zotero.



3. Add references by Identifier (Magic wand)

Type a books **ISBN** number, an articles **DOI**-number or **PMID** (PubMed-ID) and Zotero will add the reference for us.



4. Drag and drop PDF-files directly in your library.

Works best with PDF-files downloaded from academic databases, typically journal articles. The references will be generated automatically.

5. Import references from a file in RIS-format

- **File > Import**

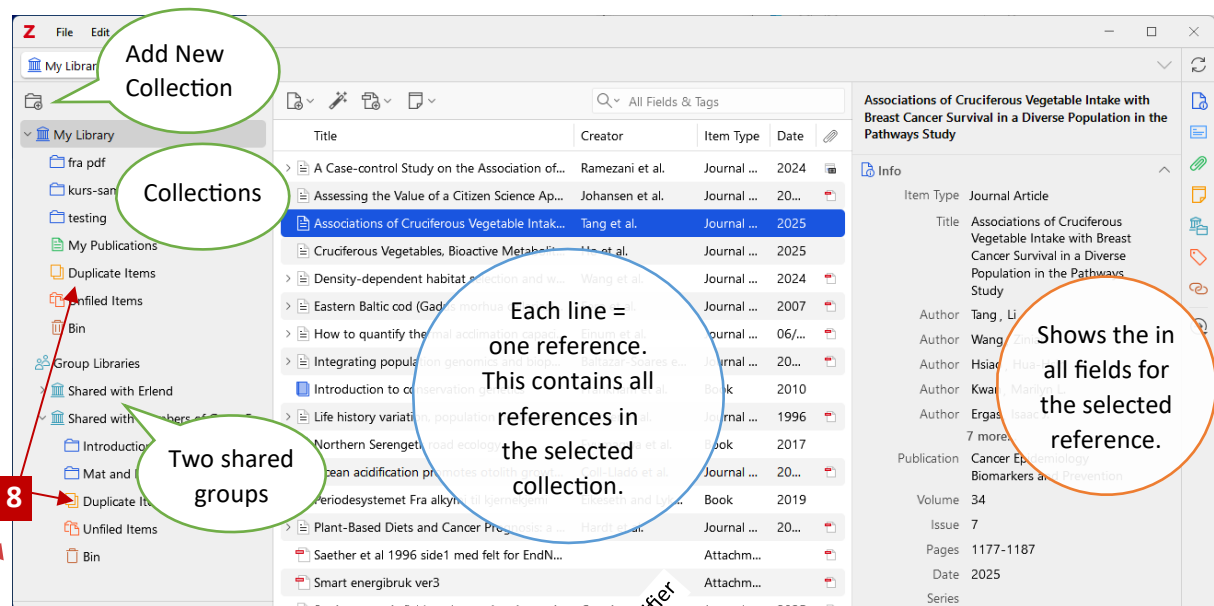
Choose **A file (BibTeX, RIS, Zotero RDF, etc.)**. Find the file and click **Open**

Always check imported references

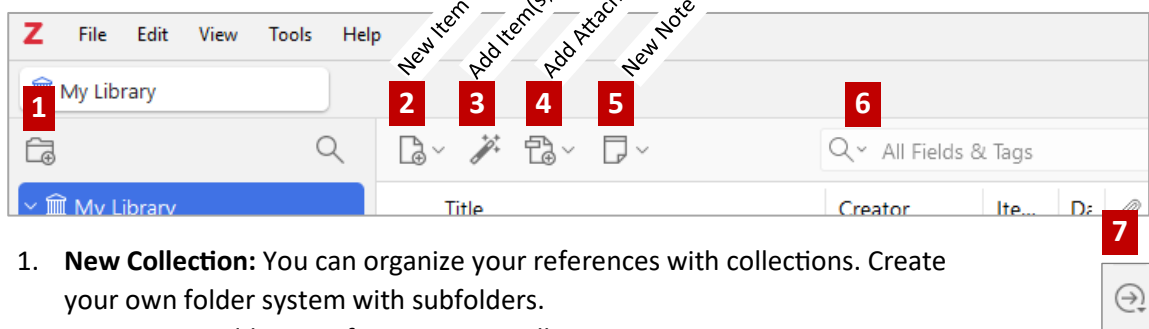
There might be errors in imported references.

- Downloading references from academic databases works usually very well
- Book chapters will often be saved as Item type Document. Change to **Book Section** and add information as shown in the chapter “Manually add references”.
- If the Zotero Connector doesn't recognize the document type, it will be imported as a web page, with information missing or in the wrong place.

Your Zotero library



Toolbars in your library



1. **New Collection:** You can organize your references with collections. Create your own folder system with subfolders.
2. **New Item** – add new references manually.
3. **Add Item(s) by Identifier** – add references with ISBN, ISSN, DOI.
4. **Add Attachment** – add **File...**, **link to File...** and **Attach File** or **Link to file...**
5. **New Note** – create Item notes for your references or a Standalone Note.
6. **Search** – search among your references within your library.
7. **Locate** – will either open the PDF, view the marked references online, or search up your article in Google Scholar.
8. **Duplicates** – You can **merge** the two references. Choose the version with best information as the master (if not exactly the same).

Collaborate with others

Create Groups you can share with others

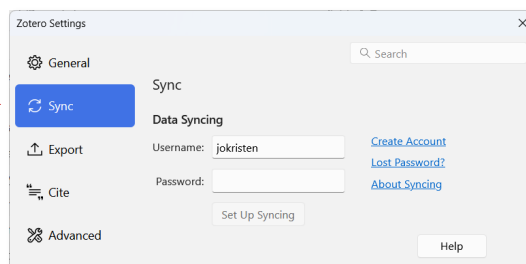
To share references with others you must first create an online **Zotero** account.

- You can **sync and access your library from anywhere** and **back up all your attached files**
- And – it lets you **share** and join **groups** with others.

1. Create a **Zotero account** (online): <https://www.zotero.org/user/register>

2. In Zotero: **Edit > Settings > Sync**

- Logg in to your and it will sync your library



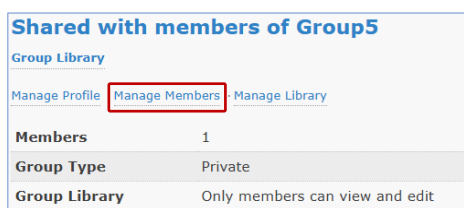
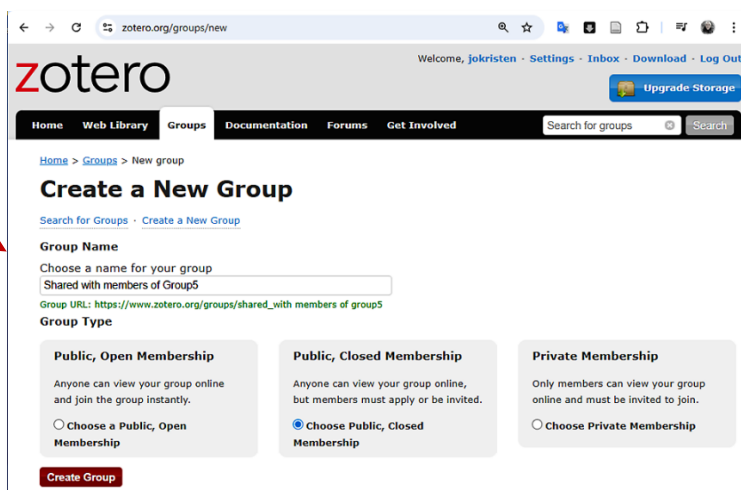
Create a shared Group

- In Zotero: **File > New Library > New Group...**

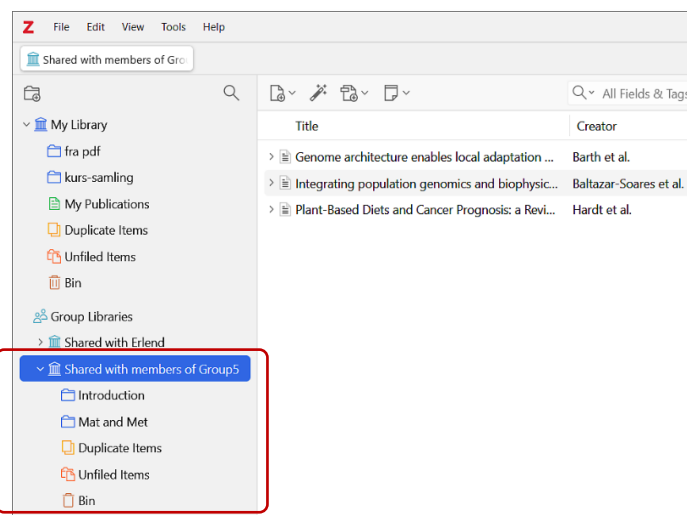
This will send you to your Zotero online account where you can **create a shared group**.

- **Name** the shared group and choose **Group Type** (restrictions)

- **Invite members:**
Click **Manage members** to send invitations (email or Zotero user name).



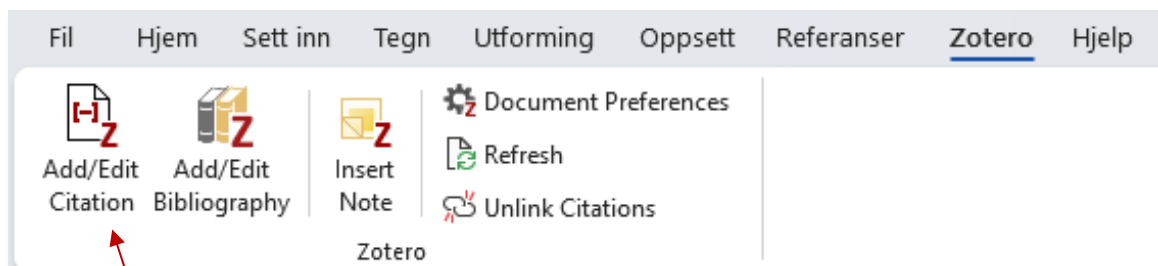
The **shared group** will now be visible in Zotero



Zotero and Word

How to add citations, choose style and make a reference list in Word

- **Add/Edit Citation:** Add a citation where your cursor is in the text. Use this to edit a citation as well, e.g. to add a page number. The citation must be marked to edit it.
- **Add/Edit Bibliography:** Add a bibliography where your cursor is. Also used to edit an existing bibliography.
- **Document Preferences:** Here you can change reference style and language.
- **Refresh:** Update all citations and the bibliography by syncing with the Zotero library.
- **Unlink Citations:** removes all field codes. NB: Can not be reversed! You should have a backup of your document connected to Zotero.

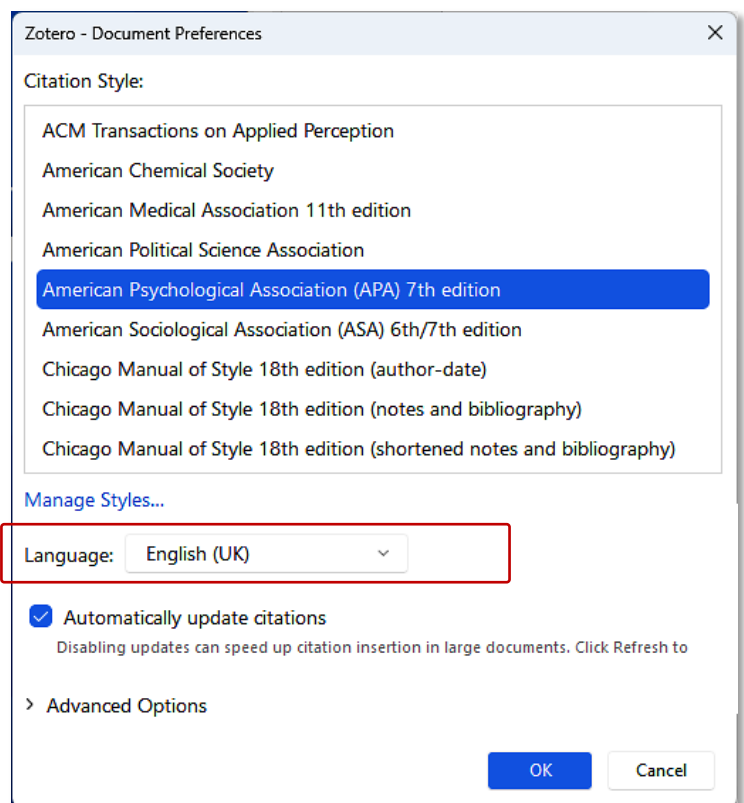


This is the Zotero tab in Word

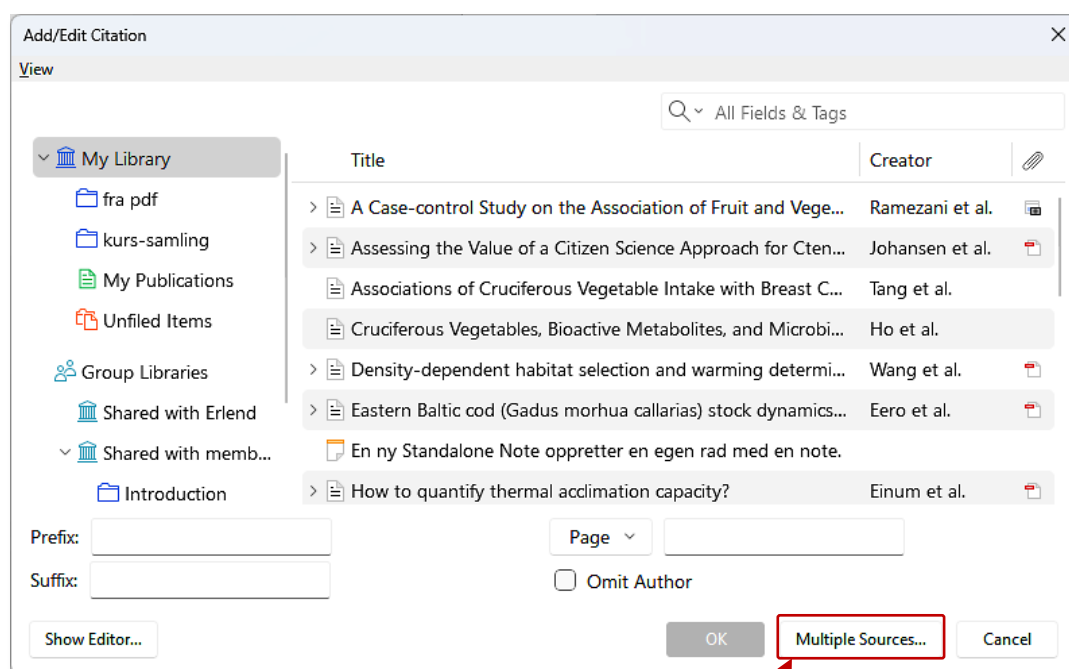
In Word:

1. **Add/Edit Citation.** To start citing in Word, place the cursor where you want to add a citation, and click Add/Edit Citation.
2. The first time you add a citation, you will be asked **to choose the style** you want to use.

Choose the **style** you want to use and in which **language**.

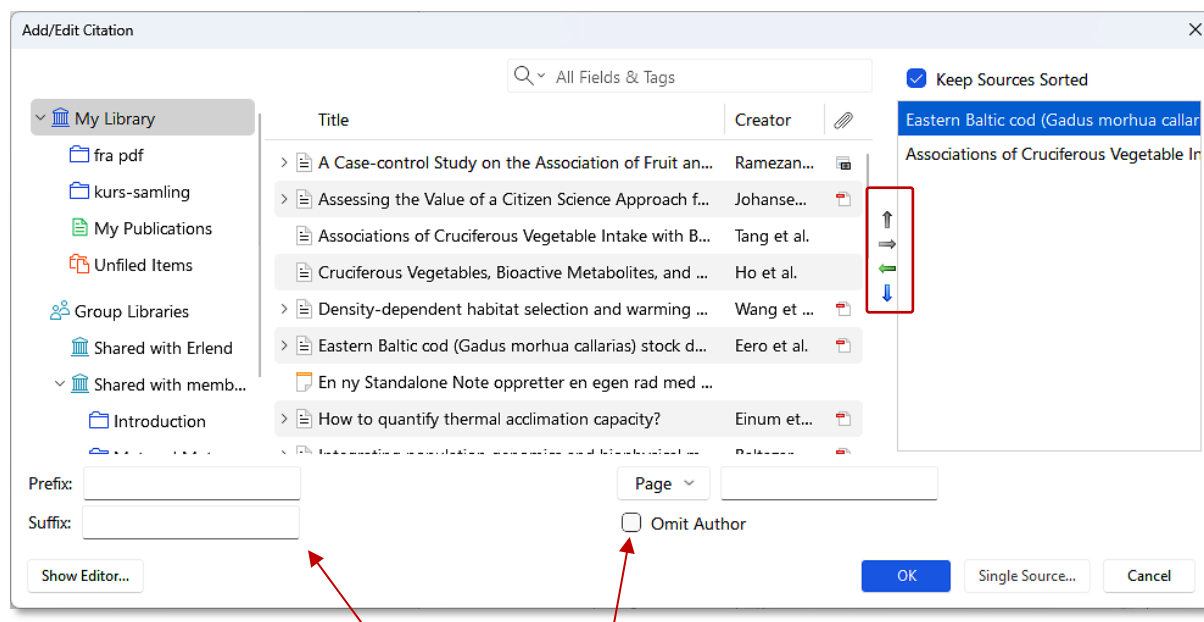


- Now, depending on the settings you have chosen (See Recommended settings above), Zotero will give you the following window of references (=Classic view) where you can choose which references to insert.



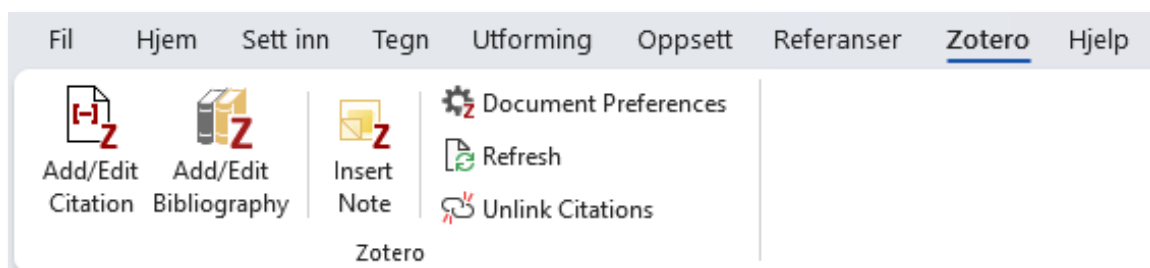
*Classic view: Add a citation in Word from the **Classic view** window*

- If you want to add more than one, click **Multiple Sources...** Mark the references you want to add, **use the arrows** to move them. Klick **OK**.



- Add **Page number**, a **Prefix** or a **Suffix**. You can **omit the Author** name if you want. (a sample: ...as shown by Johansen et al. (2021)). Type the author's name yourself.

Edit citations in Word



- **Edit citations in Word:** highlight the citation, then click **Add/Edit Citation**. (don't write anything directly in the citation)
- **To delete a citation:** Highlight it and click the Delete button.
- **Typos in the citation or in the reference list:** If you see typos/errors in the citation or in the reference list, correct the errors in the Zotero library. Then it will be updated in Word as well. You might also click **Refresh** in Word to update.
- (The **insert Note** is not so important 😊)

Troubleshooting and common problems

Zotero uses field codes in stead of citations in Word:

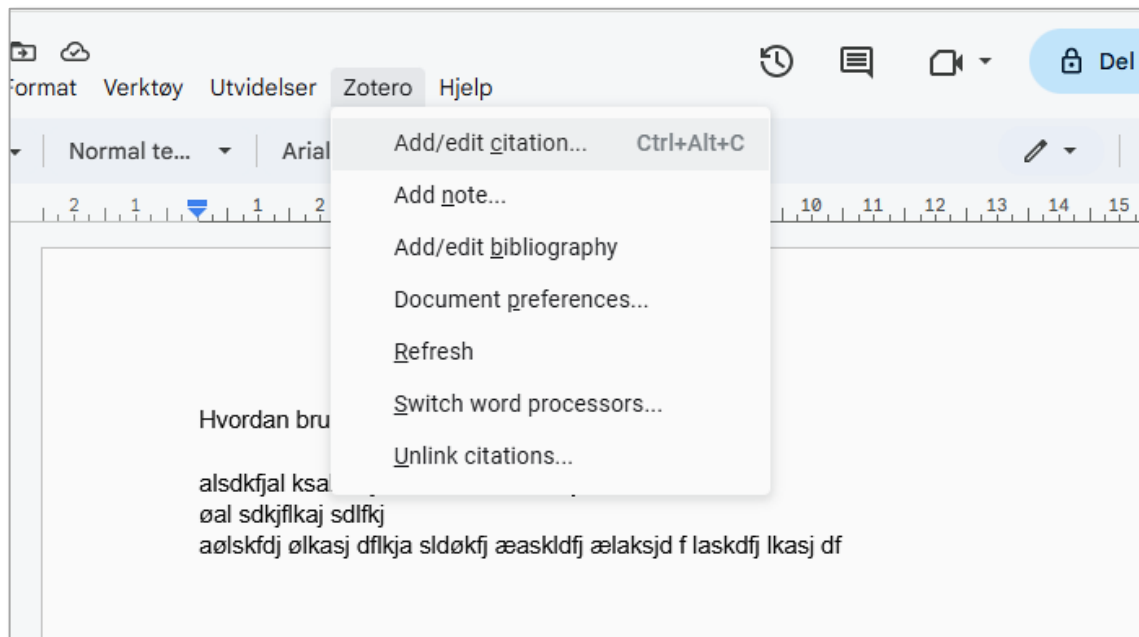
- Press **ALT +F9** in Word to deactivate field codes. You can also mark the the code for each citation, rigth click and choose activate/deactivate field codes.

Zotero plugin missing in Word:

- Close Word, open the Tools menu and choose Add-ons in Zotero.
- Check that Zotero Word for Windows/MAC integration is activated, choose Enable if not.
- If you can't click Enable: click Remove, and restart Zotero.
- If Zotero Word for Windows/MAC integration is missing: Open the Edit menu, choose Preferences. In the new window, open the tab Cite, and then Word Processors. Click Install Microsoft Word Add-in.

Zotero in Google Docs

You can use Zotero together with Google Docs in just the same way as with Word.



How do I import from EndNote?

https://www.zotero.org/support/kb/endnote_import

(In Norwegian). Tips! Lag en backup av biblioteket først.

- I EndNote: **File > Export...**
 - Bla deg frem til der mappa som heter «**My EndNote Library.Data**» ligger.
(For ansatte ligger den på M (Hjemmeområde for ansatt (M))).
 - Velg Filtype: **XML**
 - Hak av for **Export Selected References** dersom du kun ønsker å overføre noen utvalgte referanser.
- I Zotero: **Import... > A file (BibTeX, RIS, Zotero rdf, etc.)**
 - Bla deg frem til «**My EndNote Library.Data**» og velg fila **My EndNote Library.xml**
(Dette fordi Zotero vil lete etter PDF-filer i denne mappa. Lagrer du fila et annet sted, finner ikke Zotero PDF-filene)
 - Klikk **Åpne**
 - Zotero vil nå importere referansene med PDF i en ny mappe (en **Samling** eller **Collection**) som heter det samme som EndNote-biblioteket.
Referansene her kan du flytte rundt på som du selv ønsker i ettertid.
 - *Alle felt Zotero ikke forstår ved import, vil sees som en egen rad under referansen – en Note. Sjekk at dataene i disse «notene» ligger i selve referansen, så kan du bare slette disse.*