

ZOTERO instructions

Workshop

- Go to <http://zotero.org>.
 - Click on “Login.” If you do not have a Zotero account, click on “Register for a free account.”
 - Enter your email, create a username and password.
 - Remember (i.e. write down!) your username and password
 - Under “Settings,” you can also take some time to complete your profile, upload your resume or CV, choose preferences for privacy and email, etc. [You may need to click on your name and My Profile]
 - Let’s set up your profile > click edit profile
 - A brief bio
 - Location
 - Disciplines
 - Affiliation
 - personal website or digital profile
 - Leave this tab open in your browser
 - Go back to the Zotero homepage. Download the Zotero App from the Zotero website (<http://zotero.org> —it will recognize if you are on Mac, Linux, or PC, as well as which browser you are using ... so choose the browser you normally use).
 - Download Zotero (left side)
 - PCs
 - Click download
 - Open the setup file
 - Go through the setup wizard (when prompted, leave “Standard” install selected)
 - Macs
 - Click download
 - Open the Zotero .dmg file
 - Go through the install process
 - MACs - It will ask you to drag the icon to the Applications folder.
 - Linux or PCs - (no prompt?)
 - After you have installed the Zotero App...go back to the Zotero website, look at the right column, and install the Zotero Connector for your browser (Firefox, Chrome, Safari, Edge) by following the steps outlined on the Zotero.org homepage.
 - For most users, the connector is bundled with Zotero 6.0. You just have to enable it in your browser extension (settings)
 - In Safari, I have to open Zotero, then quit and restart it. Once you do this, then it will show up in Safari > Settings > Extensions. Turn it on. [In Settings > Websites >Reader, also toggle Zotero to “On” and Pop-up windows Zotero to “Allow”]
 - In Chrome, “Add to Chrome” >> “Add Extension” - once installed you can pin it
 - In Firefox, “Continue to Installation” >> “Add” >> “Open Application Menu.” Once installed, click on Extensions in the toolbar, click on Zotero, click on the gear wheel (settings), and pin to toolbar.
 - Once completed, you should now see a Zotero icon in your web browser’s toolbar.
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Working with the Zotero Website

Add a folder

- Go back to the Zotero.org website.
- In the top left, find “My Library and click the “+” symbol
- Create a name a folder (ex: HIS5450 or PoL/Unit Resources)
 - Create two more folders, maybe one for each class you have this semester?
 - Then, click on one folder and then click on the “...”(more) button to the right and select “New Subcollection”
 - Create a subcollection folder that would be a focus of that class (ex: individual research / lesson plan ideas / digital tools / primary sources)
 - Do the same for the other main folders; create subcollections that make sense for you.

Adding Items: The “manual” approach: adding items via the Zotero website portal

- Go to this link: Amazon HIS 5450 list to see some useful book resources
 - Click on one book, such as “World History in Documents” or “The Social Studies Teacher's Toolbox” and visit the page. [It might be easier to open this page as a separate window]
 - Scroll down and copy the ISBN number, either the 13 or 10-digit number. Hit enter or return on your keyboard.
 - Go back to the Zotero tab, and click on the magic wand icon in the middle toolbar, and paste the ISBN number without dashes or hyphens..
 - Congrats! You just completed your first Zotero entry! However, some data may be missing or require editing.
 - OK, try two more books in your other folders. Make sure the metadata is correct when importing.

Before Adding Items: the “native” application/browser extension- approach.

- Open or go to your Zotero App.
- Before we begin adding items, go to Zotero > Settings (Mac) or preferences (PC). You will see 6 tabs ...
 - General: do nothing unless you want any PDFs in your Zotero library to open with another application
 - Sync:
 - Settings:
 - Enter your username and password; click “set up syncing”
 - Once completed, the default settings should be fine.
 - Reset: do nothing
 - Search: nothing to do here
 - Export: Select as your default citation style: Chicago Manual of Style 18th Edition (notes and bibliography); language as English (US usually, but this can be changed if you ever need to cite in English UK or a second language)
 - Cite:
 - Styles: nothing to do here unless you ever need to upload a citation style not listed here.
 - Word Processors:
 - Open Microsoft Word on your computer
 - Once Word is open, go back to Zotero Preferences and install the Microsoft Word add-in tool

- o It may already be installed, so no need to “Reinstall,” unless it doesn’t work properly.
- Recommendation: select the box that says “Use classic Add Citation dialog” [If you don’t use Word, select “Get word processor plug-ins”]
- o Advanced:
 - General: nothing to do here
 - Files and folders: nothing to do here
 - Shortcuts: nothing to do here, but useful to know when working with Zotero
 - Feeds: nothing to do here
- Close Settings or Preference window

OK, let's add some items!

- Go back to your browser and go to the following websites in three different tabs:
 - Amazon (books)
 - New York Times
 - WorldCat database (especially if you can access it through Belk Library databases)
- Begin with the Amazon book list and select another book.
- Go back to your Zotero App for a second.
- Hit the sync button (a green circular arrow to the right)
- Select the correct folder you want to add an item to.
- Go back to your Amazon page and click on the Zotero icon – which changes based on the type of resource it detects. In Amazon it should be a book or webpage icon.
 - o Congrats! You just added another item to your Zotero collection!
 - o Check the metadata. For example, this approach produced a more complete metadata set for *Why Teach History (When It's Already on Your Phone)* than the magic wand via the Zotero webpage.
- Add 1-2 more items, but this time use NYT and WorldCat websites. Find books or newspaper articles that catch your eye. Create folders or sub-folders that fit your entry.
 - o To add: once you find what you want, **wait for your page to fully load** and hit the icon symbol (page, book, newspaper rolled up)

→ You can always delete (move to trash) any items or folders we create today in class!!!

- After adding a few items, edit and fix the metadata if necessary
 - o Metadata is located on the right pane once you highlight your new entries
 - Check your tags for each item
 - o Add your own tag
 - Add a note (why you added this article – relevancy)
 - o End each review with your name (“- Jane Doe”)
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Using Zotero for writing papers

Zotero works well with both [Google Docs](#) and [Microsoft Word](#).

In your blank document, type some random sentences

- Now we are going to add a footnote and a Works Cited page using Zotero
- Then we are going to add a Works Cited page

.....
You will receive an invitation to join the Zotero Group for our class. You must be registered with Zotero first, so take care of opening your free basic account (see page I of this document).