



Introduction to Citation & PDF Management with Zotero

Github version: <https://lib.uvic.ca/z> (note, the

Github version requires an update, instead please use Google Docs version below instead)

Activity 1: Downloading Zotero, Browser Connector, & Word Add-in

In this exercise, you will:

1. Download & install **Zotero** from [Zotero.org](https://zotero.org)
2. Download & install the Zotero Browser Connector
3. Download & install the Microsoft Word/LibreOffice Add-in

If you have any questions or get stuck as you work through this, please ask your instructor for assistance. Have fun!

Before you begin

Remember:

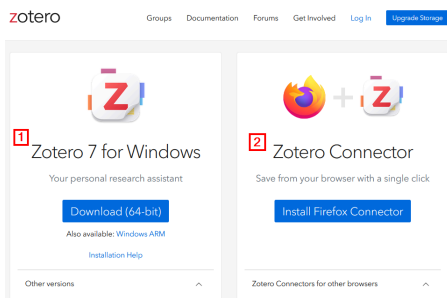
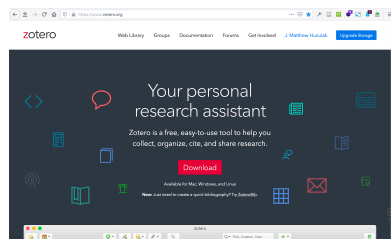
- **Zotero** is a program that resides on your computer that may or may not sync to the web depending on your preferences
- In order to capture sources from the web with the click of a button, you must install a **browser connector**
- In order to insert citations and create bibliographies, double-check the the **Word Add-in** has been installed

1. Downloading Zotero

- 1) **Go** to Zotero.org and click "Download"

You will see two options:

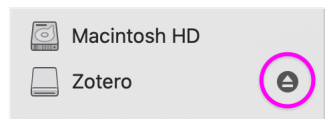
1. Download Zotero for Mac or Windows
2. Zotero Connector



- 2) **Click "Download"** under "Zotero for Mac/Windows"

- 3) **Save** the file to your disk and then install it.

- 4) Once the installation is complete, **delete** the downloaded file, and if you're on a mac, eject it from your finder window.



- ✓ Congratulations! You've downloaded and installed Zotero on your computer!

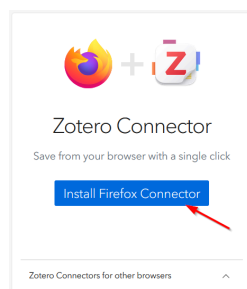
2. Adding the Browser Connector

In this exercise, you will:

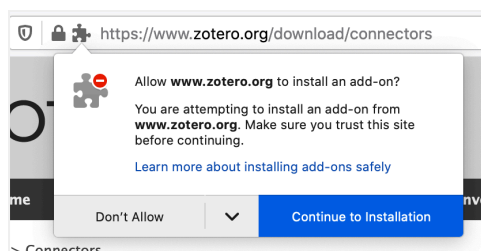
1. Install the Browser Connector so you can easily capture sources and PDFs from your browser.

When you open Zotero for the first time, you will be welcomed by the start screen. It may even prompt you to install the “Browser Connector” automatically. If so, follow the prompts to install the connector. If not, follow these directions:

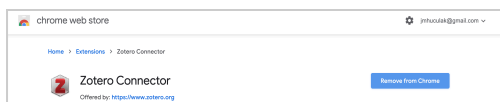
1. **Navigate** to the Zotero downloads page and find the Connector box
<https://www.zotero.org/download/>
2. **Click** on the Install Firefox/Chrome/Safari Connector button.



- a. If you are using Firefox, you will be prompted to install the Connector through the URL pane. **Click** “Continue to Installation”



- b. If you are using Chrome, you will be directed to the Chrome Web Store. **Click** “Add to Chrome”



- c. For the time being, Safari is supported through BETA builds, so we will not be learning about this today (but it should be available soon!)

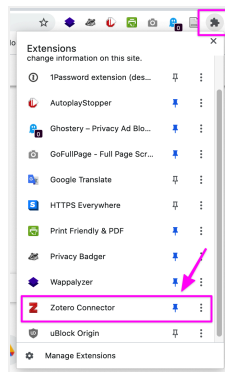
- ✓ When you are finished, you should see a new Browser Connector icon in your browser's icon bar (unless you're in Chrome)



To **access** the new icon in **Google Chrome**, click on the “puzzle piece” icon in your browser, and then click the “pin” button so it will appear on your extensions bar.

Congratulations! you have now installed the browser plugin! You should now see something that looks like this in your browser toolbar.

If you are using Google Docs, the browser connector will also add Zotero functionality to your documents.



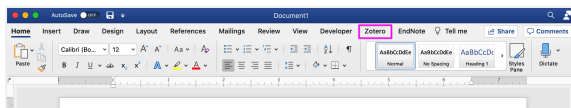
3. Double-check the Word Processor Add-in has been installed

Zotero has **out-of-the-box** [support](#) for:

- Microsoft Word
- Google Docs
- Libre Office

Note: You can use Zotero with ANY word processor using the “rtf scan” plugin, but that will not be covered today.

A. Microsoft Word

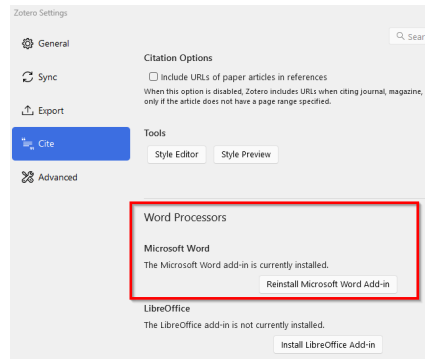


With the new release of Zotero 7, you no longer need to install the Word plugin separately. The Word plugin is automatically installed when you install Zotero. To check, **RESTART** Word. If you see a new tab that says “Zotero,” you can skip to the next activity. If not, follow these directions:

1. Go to the **Edit** Menu, then choose-> **Settings** -> **Cite** tab

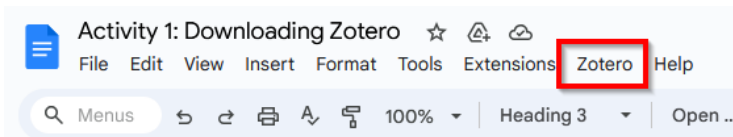
2. Scroll down to the “Word Processors” section and click on the button to “Reinstall Microsoft Word Add-in”

✓ Congratulations! You should now have a Zotero tab in Microsoft Word



B. Google Docs

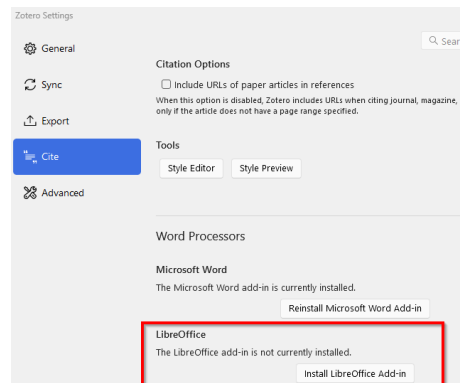
Great news! When you installed the “**Browser Connector**” in the previous sections, you automatically installed Zotero support for Firefox and Chrome. If you start a new document, you should see a new tab called “Zotero.”



If you do not see this, reinstall the “Browser Connector” and restart your browser.

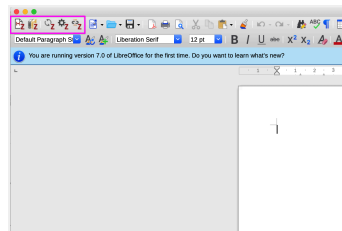
C. LibreOffice

1. In Zotero, go to the **Edit** Menu
 - a. **Mac:** Zotero → Menu
 - b. **PC:** Edit → Menu
2. Click on **Settings** -> **Cite** tab
3. Scroll down to the section that says “Word Processors”
4. Click the button the says “Install LibreOffice Add-in”



5. **Restart** LibreOffice & Zotero

- ✓ Congratulations! You should now see the Zotero menu in LibreOffice.



You have now installed Zotero, the Browser Plugin, and the Word Add-in. You may proceed to [Activity 2](#).