

Using Zotero Instructions

Follow these instructions to:

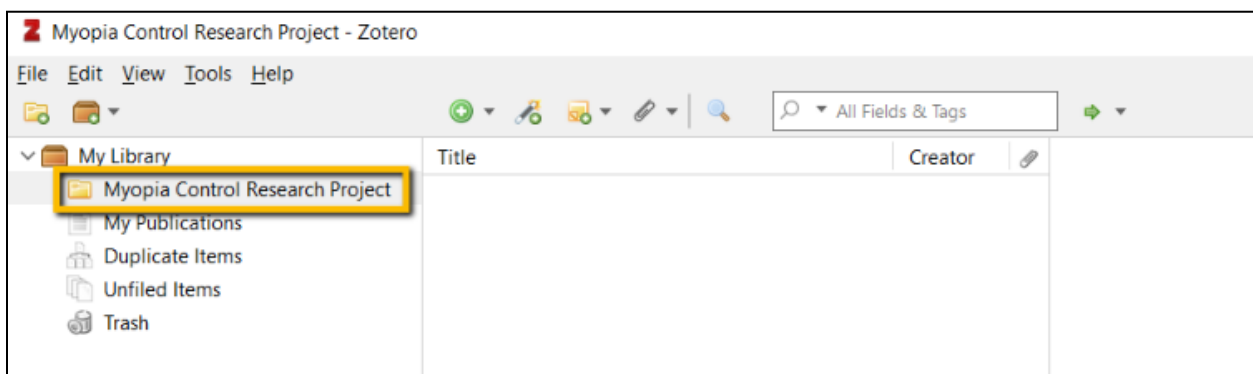
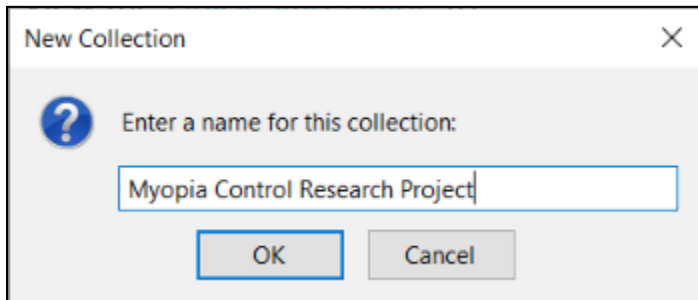
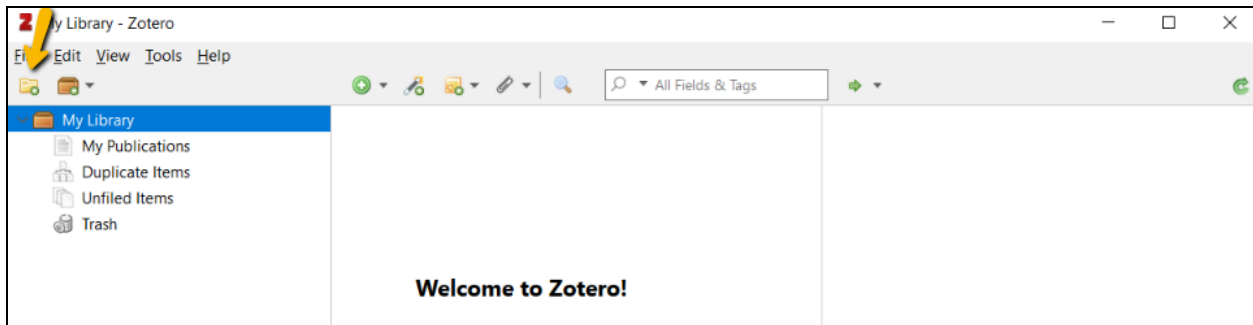
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Useful Links:

- [Zotero](#)
- [Zotero Quick Start Guide](#)

Create a New Collection in Your Zotero Library

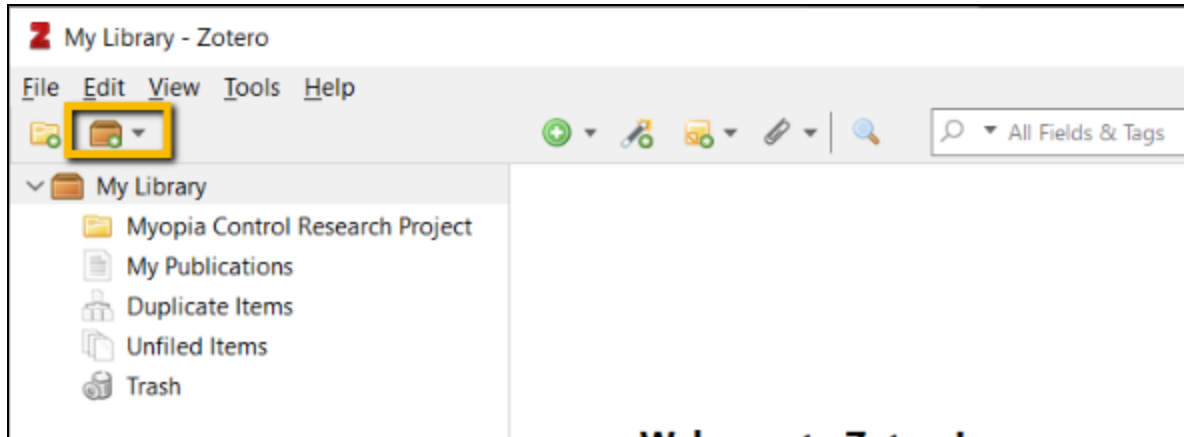
1. The left pane includes *My Library*, which contains all the items in your library.
2. Right-click on *My Library* or click on the *New Collection* button (looks like a file folder with a + sign) above the left pane to create a new [collection](#), a folder into which items relating to a specific project or topic can be placed. Think of collections like playlists in a music player: items in collections are aliases (or “links”) to a single copy of the item in your library. The same item can belong to many collections at one time.



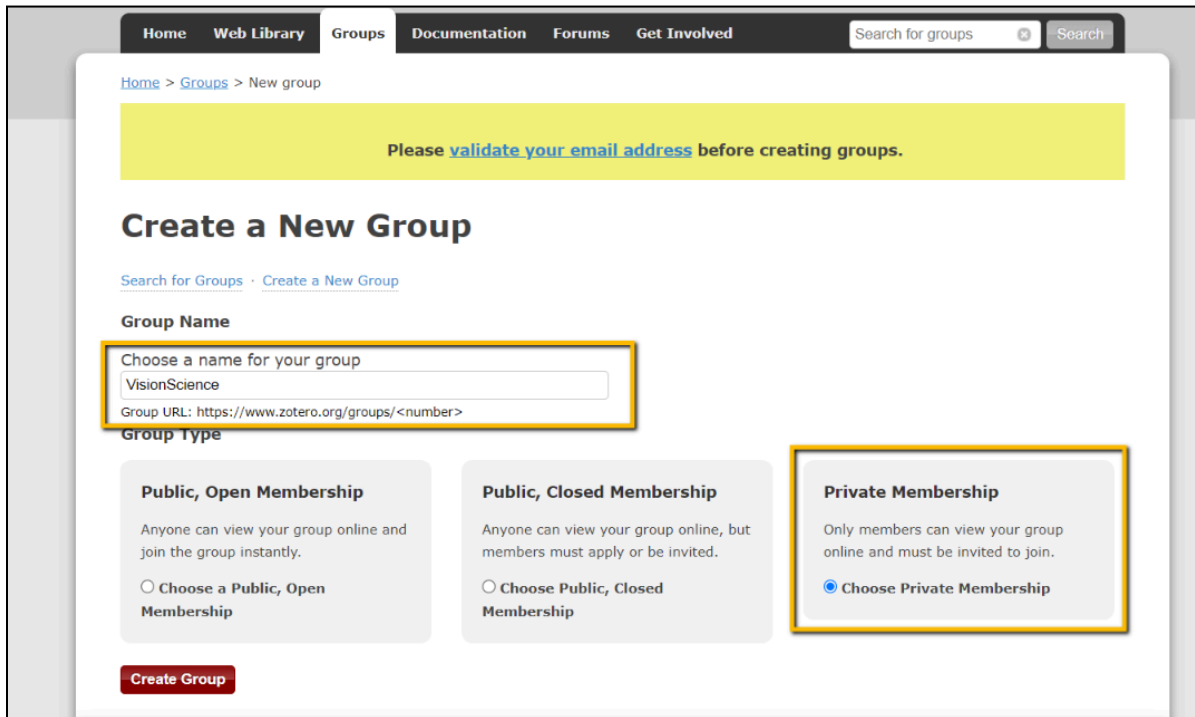
Create a Zotero Group Library

See [Zotero Groups](#) for detailed instructions

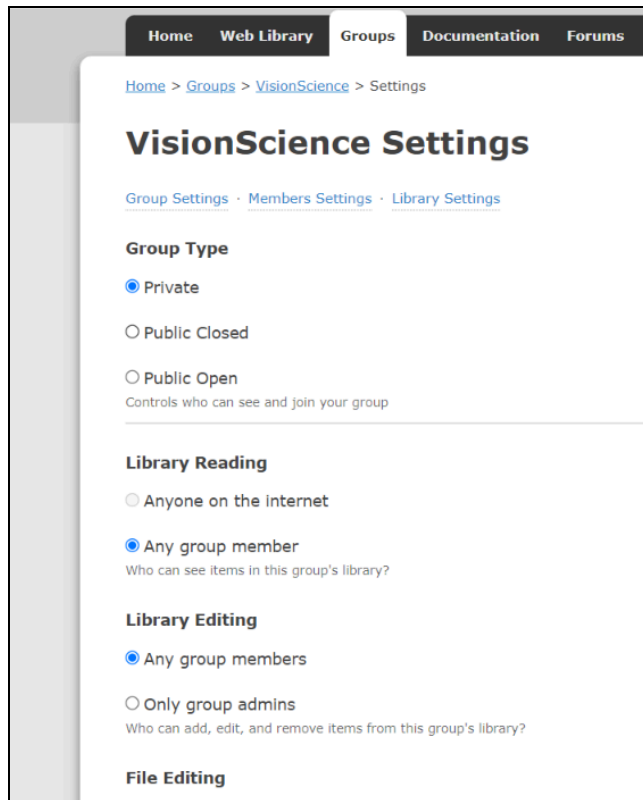
1. Click the *New Library* icon next to the *New Collection* icon. Click *New Group*. If you have a different interface, click *File, New Library, New Group Library*.



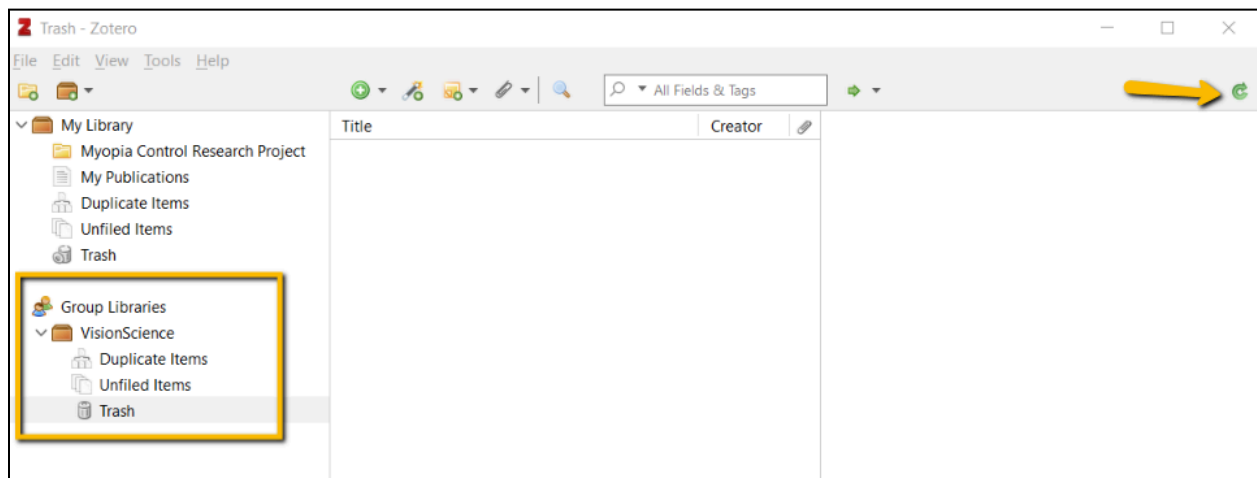
2. You'll be sent to <https://www.zotero.org> and asked to log in. After logging in, choose a name for your group and select the type of membership you want for your group. For this example, we'll select *Private Membership*.



3. Confirm your group settings.



4. Now you'll see that your group has been added to your Zotero app under *Group Libraries*.



5. Now you want to invite people to your group. To do that, while logged in to Zotero online, click the *Groups* tab and click on the name of your group.

Home Web Library **Groups** Documentation Forums Get Involved

[Home](#) > Groups

Zotero Groups

[Search for Groups](#) · [Create a New Group](#)

VisionScience

[Group Library](#)

[Manage Profile](#) · [Manage Members](#) · [Manage Library](#)

Members	1
Group Type	Private
Group Library	Only members can view and edit

6. Click *Group Settings*.

Home Web Library **Groups** Documentation Forums Get Involved

[Home](#) > [Groups](#) > VisionScience

VisionScience

[Group Library](#) **Group Settings**

Recently Added Items

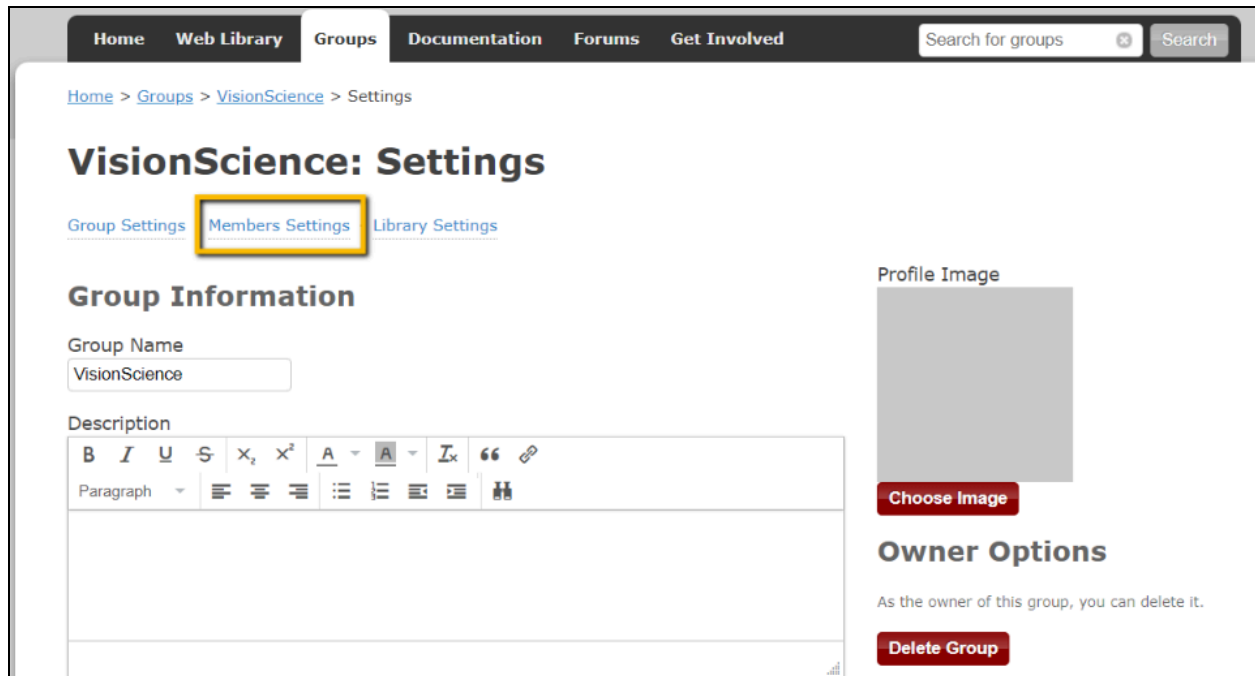
There are not yet any items in this collection

Owner: [jenlatrip](#)
Registered: 2023-08-16
Type: Private
Membership: Invitation
Library Access: You can view and edit

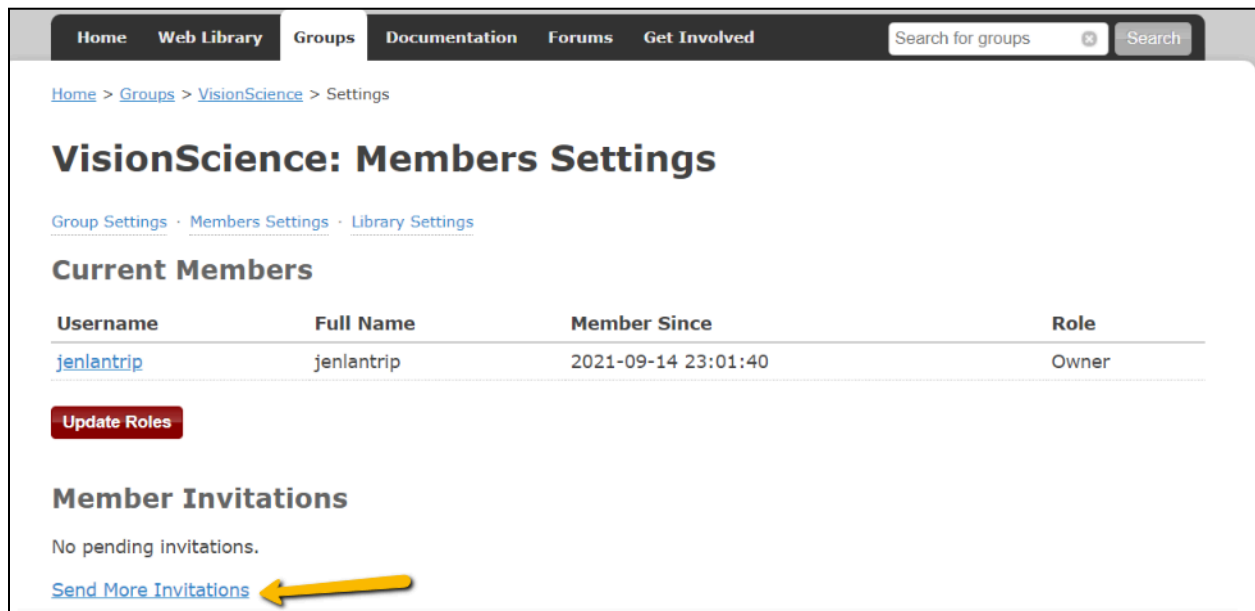
[Members \(1\)](#)



7. Click *Member Settings*.



8. Under *Member Invitations*, click *Send More Invitations*.



9. Then add the email addresses of the people you wish to invite to this group separated by a comma and click *Invite Members*.

[Home](#) [Web Library](#) [Groups](#) [Documentation](#) [Forums](#) [Get Involved](#)

Invite Members

Group: [VisionScience](#)

Invite Members

Separate email addresses or zotero usernames with a comma.

10. Now you should be able to see the list of current members and the list of member invitations.

[Home](#) [Web Library](#) [Groups](#) [Documentation](#) [Forums](#) [Get Involved](#)

[Home](#) > [Groups](#) > [VisionScience](#) > Settings

VisionScience: Members Settings

[Group Settings](#) · [Members Settings](#) · [Library Settings](#)

Current Members

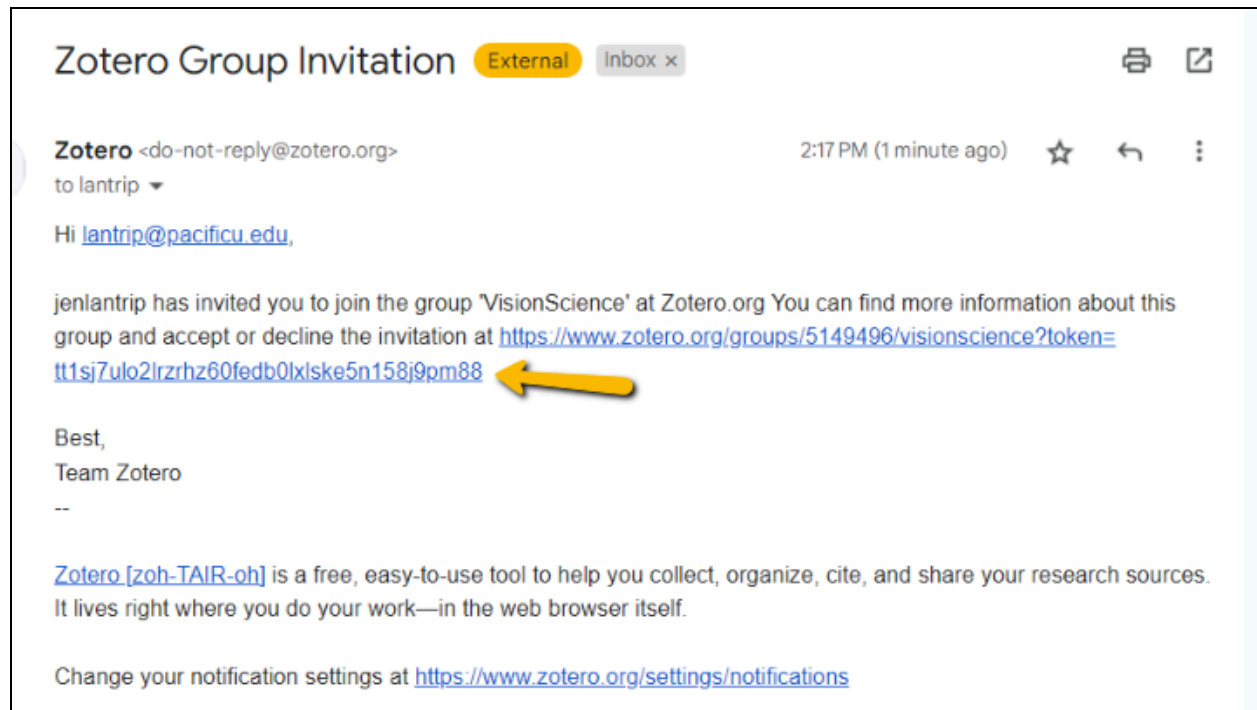
Username	Full Name	Member Since	Role
jenlantrip	jenlantrip	2021-09-14 23:01:40	Owner

Member Invitations

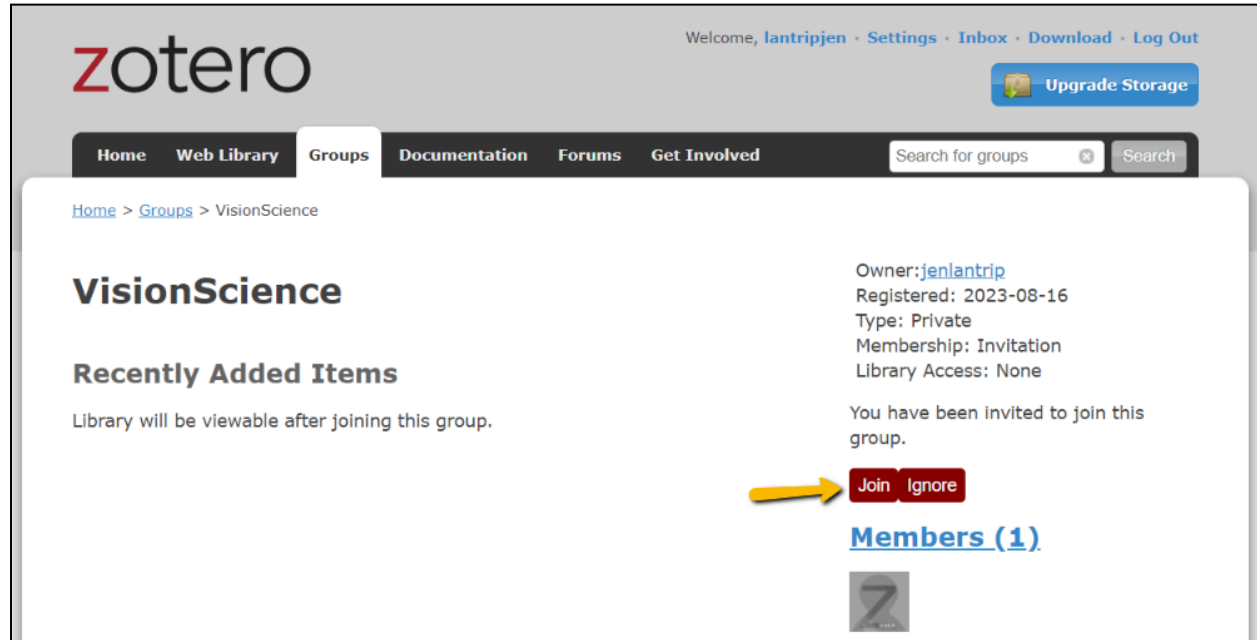
Username	Full Name	Invited On	Cancel Invitation
lantrip@pacificu.edu		2023-08-16 21:17:38	Cancel

[Send More Invitations](#)

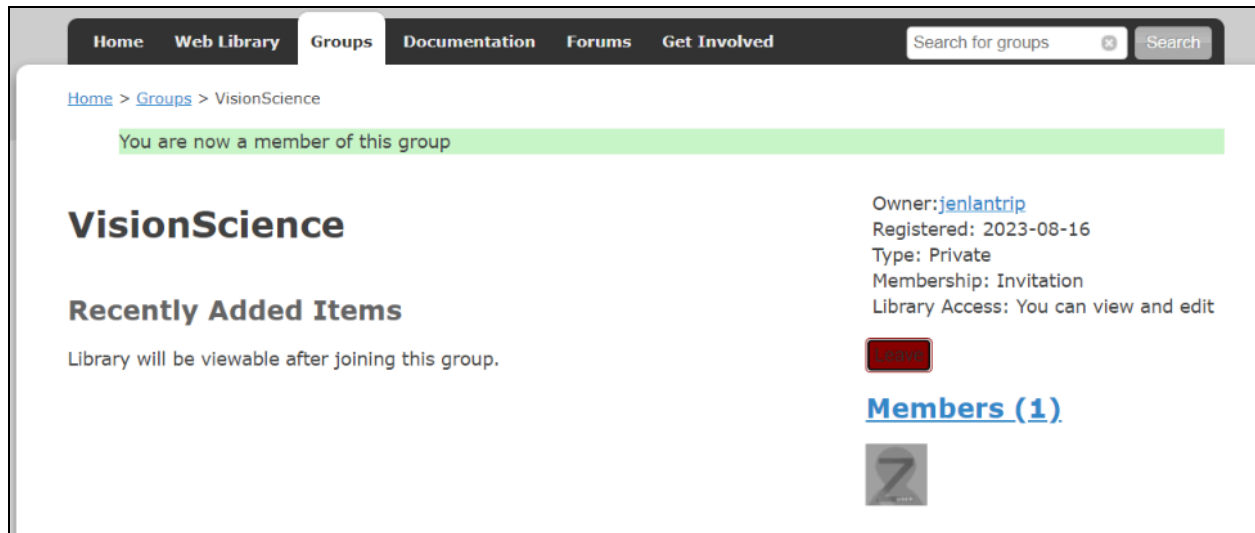
11. The people you invited will receive an email with a link to accept the group invitation.



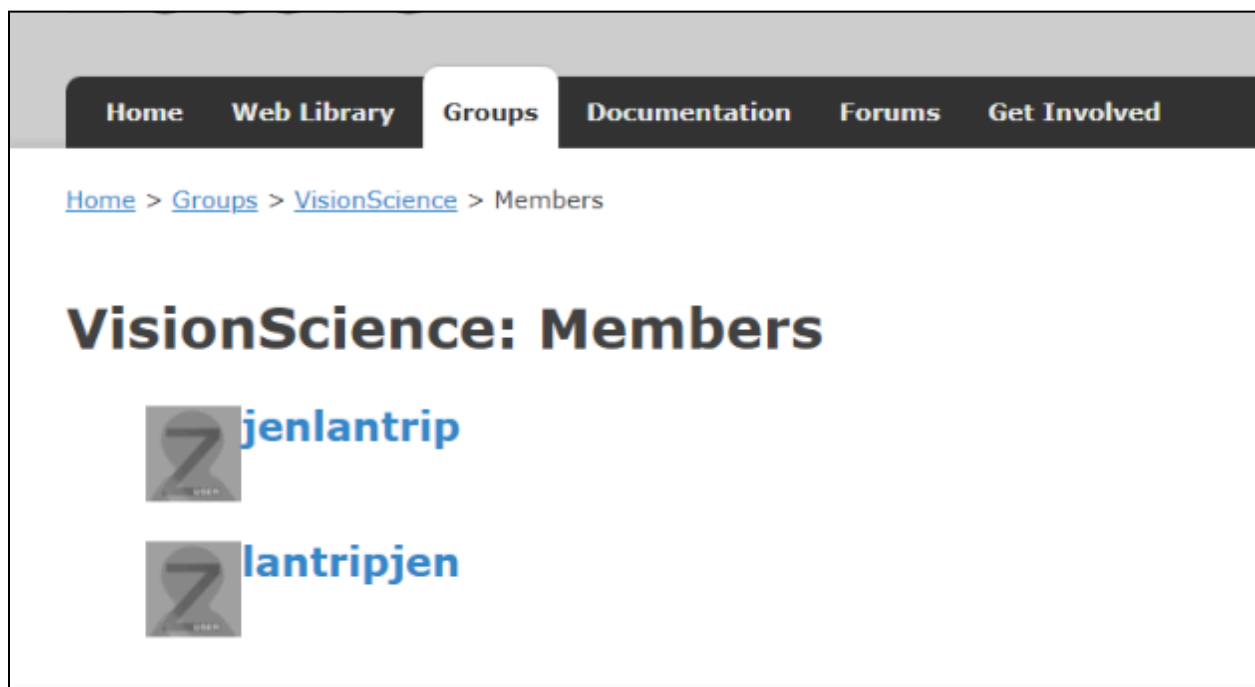
12. They will need to create a Zotero account if they don't already have one. Then when they go to *Groups* in their Zotero account, they should click *Join* to join your group.



13. Then they will see that they are a member of your group.

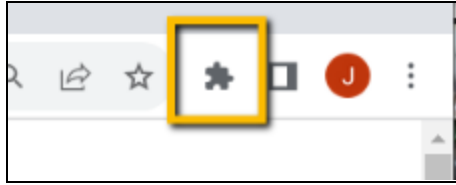


14. After they have joined your group, you will be able to see that they are now added to your group.



Add Sources from the Web and the Full Text to your Zotero Library

1. When you find a source online that you want to add to your Zotero library, such as a book, article, or website, click the Zotero connector in your web browser.

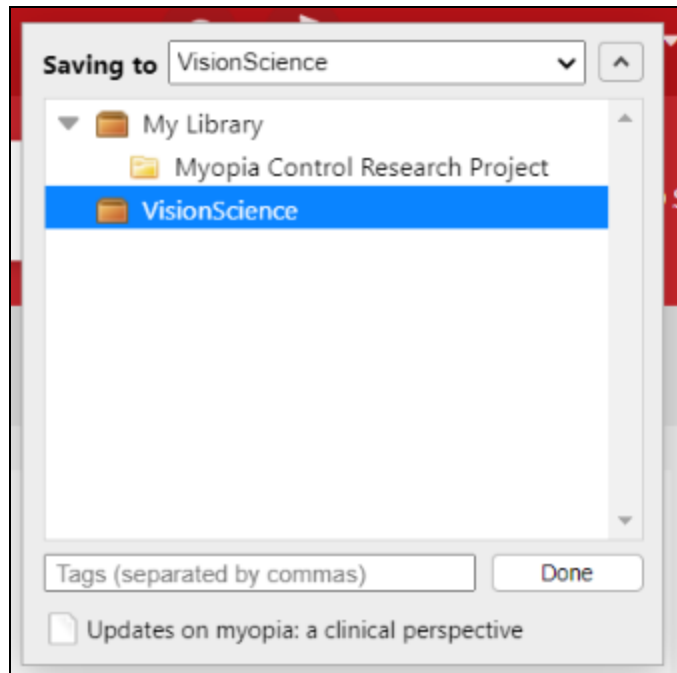


If you're using Safari and don't see the Zotero connector in your web browser, follow these instructions:

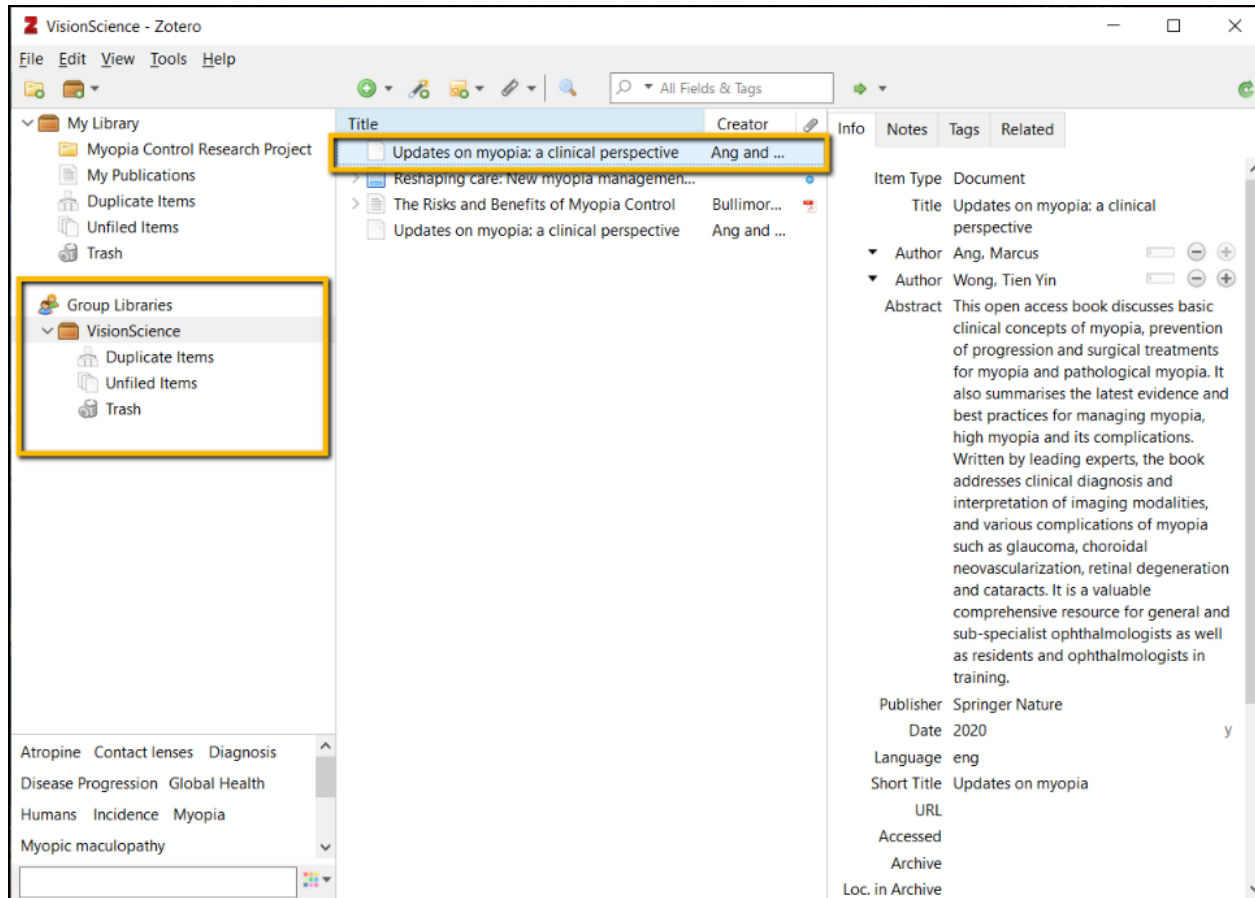
1. In Safari, go to the *Safari* menu and click *Preferences*.
 2. Click the *Extensions* tab.
 3. Check the checkbox next to the Zotero Connector.
 4. The Zotero Connector icon should appear to the left of the URL box.
2. When the Zotero connector appears, you will be able to select the folder that you want to add the source to. In this example, we're adding a book that we found in the Pacific University Libraries search box. It is currently set to add the source to the VisionScience group library. We can change the folder by clicking the *Saving to* drop-down menu.



3. If we select, *More*, from the *Saving to* drop-down menu, we can see all of our folders and select the one where we want the source to be saved to.



4. We'll be able to see that the source was saved to our Zotero app in the correct folder. In this case, we can see that it was saved to our VisionScience group library. In this example, it's a print book and so there is no full text accessible in Zotero for this source.



5. If you find a source that does have the full text, then navigate to the webpage where the full text can be found. Then click the Zotero connector. You'll see the full text access options in the Zotero connector under the folder where the source will be saved. In the example below, it's saving the link to the article in PubMed and a PDF of the full text of the article.



myopia and cataracts



Search

Advanced

User Guide

Search results

Save

Email

Send to

Display options

Meta-Analysis > Invest Ophthalmol Vis Sci. 2020 Apr 9;61(4):49. doi: 10.1167/iops.61.4.49.

The Complications of Myopia: A Review and Meta-Analysis

Annechien E G Haarman^{1 1}, Clair A Enthoven^{1 1}, J Willem L Tideman^{1 1}, Milly S Tedja^{1 1},
Virginie J M Verhoeven^{1 1 1}, Caroline C W Klaver^{1 1 1 1}

Affiliations + expand

PMID: 32347918 PMCID: PMC7401976 DOI: 10.1167/iops.61.4.49

[Free PMC article](#)

NEXT RESULT

Title	Creator
The Complications of Myopia: A Review a...	Haarman...
Full Text	
PubMed entry	
> Updates on myopia: a clinical perspective	Ang and ...
> Reshaping care: New myopia managemen...	
> The Risks and Benefits of Myopia Control	Bullimor...

Full Text

https://iops.arvojournals.org/arvo/content_public/journal...

Filename: Haarman et al. - 2020 - The Complications of ...

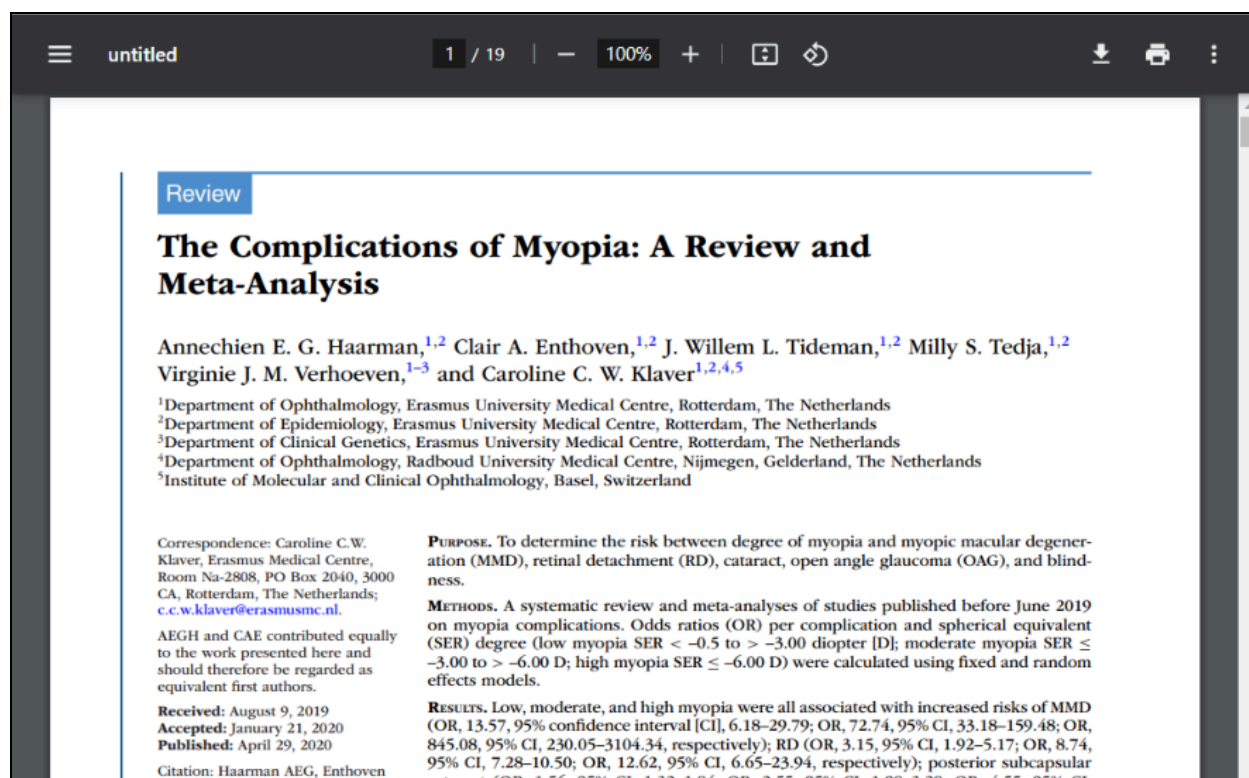
Accessed: 8/19/2023, 9:04:02 AM

Pages: 19

Modified: 8/19/2023, 9:04:02 AM

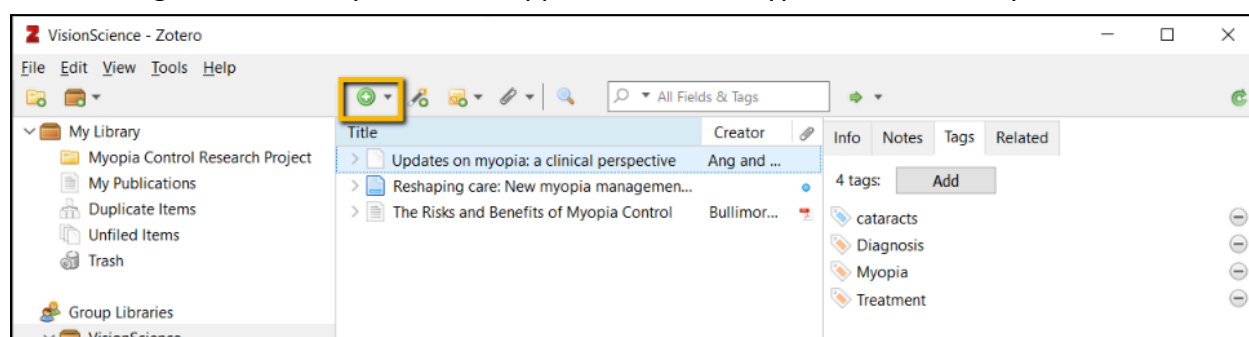
Indexed: Yes

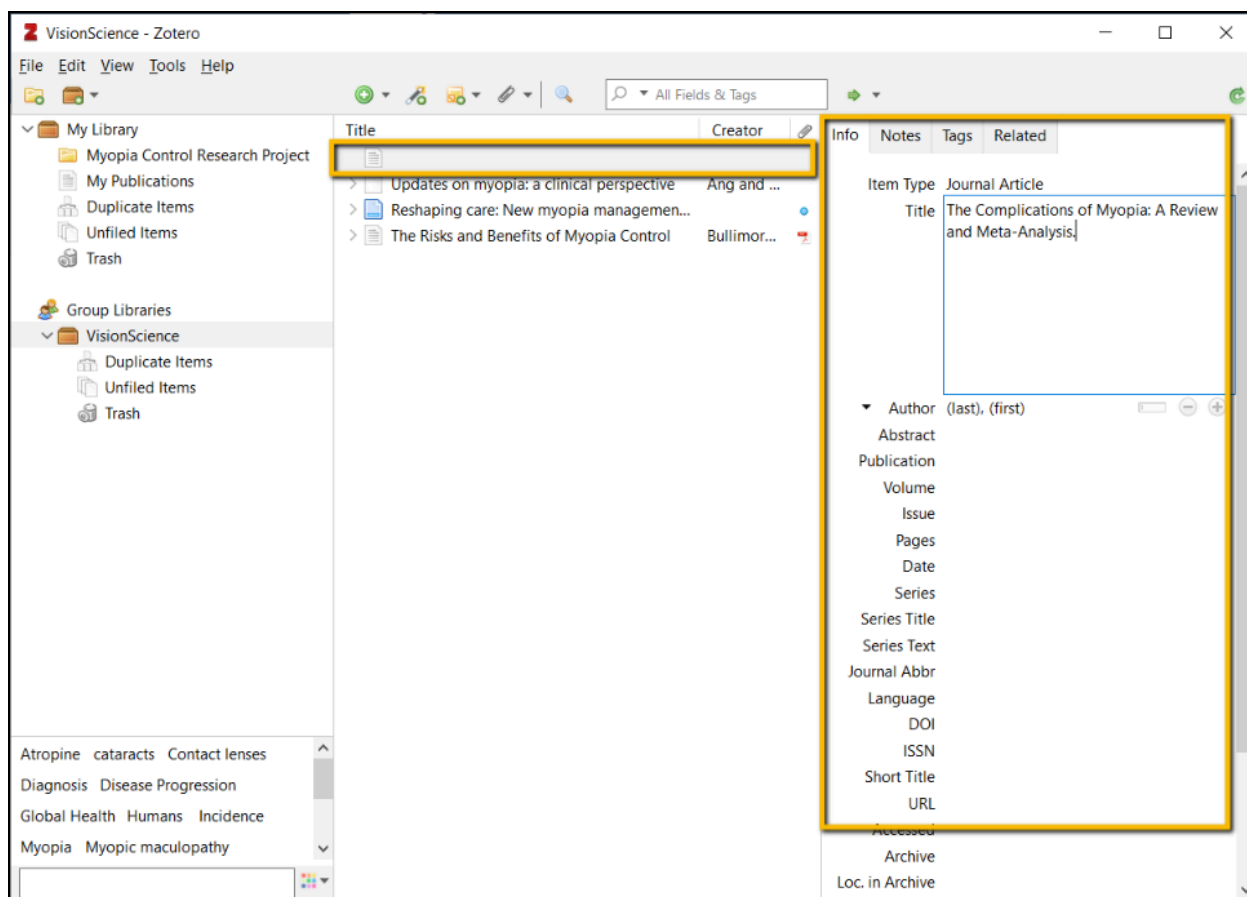
Aa A T_x [+] ...



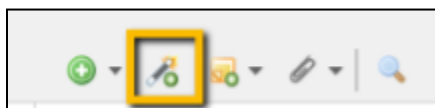
Add Sources Manually to Your Zotero Library

1. If you want to add a source to your Zotero library that you can't find on the Web, click the green + icon in your Zotero app and select the type of source that you wish to add.





3. Alternatively, if you have the ISBN, DOI, PMID, arXiv ID, or ADX Bibcode, you can select the icon that looks like a magic wand next to a + sign and enter the source's ID. Zotero will add it to your library.



Correct the Citation Information for a Source

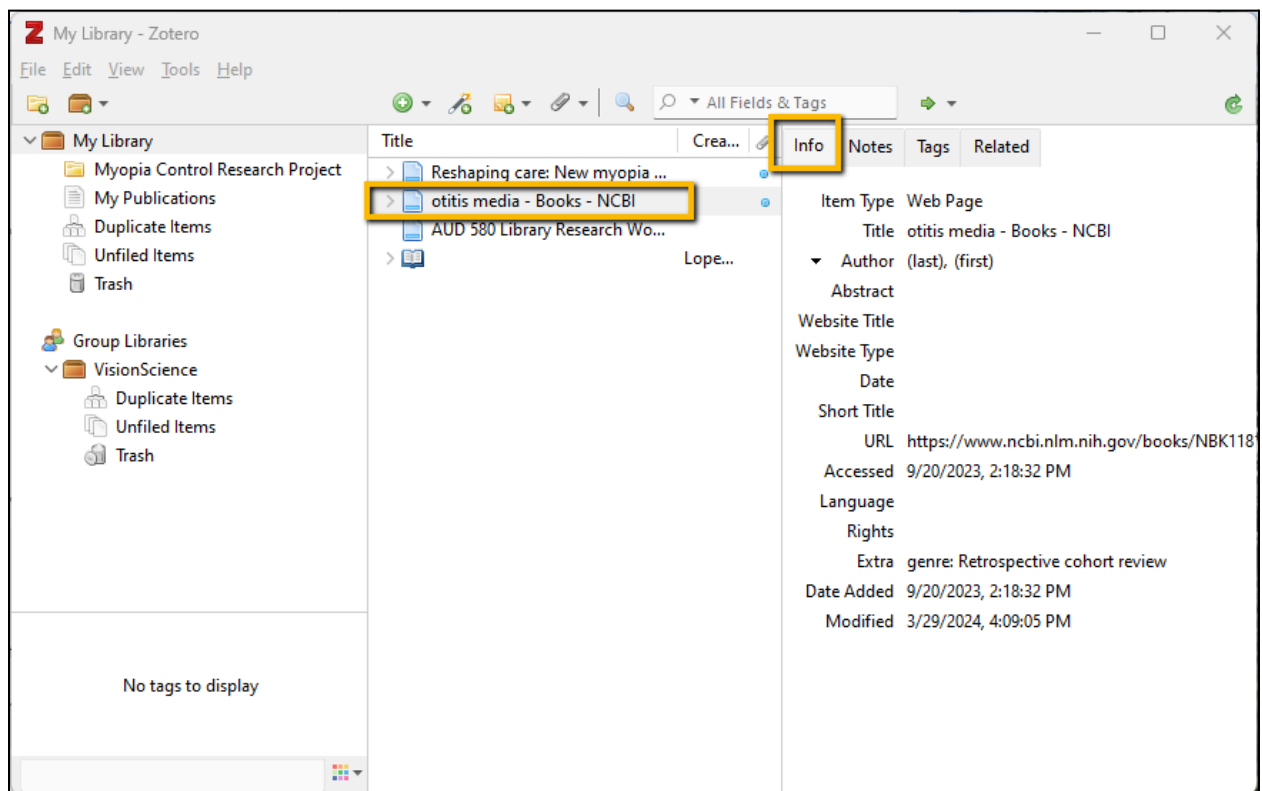
1. If the citation information entered in the *Info* tab for a source is incorrect, the citation will be incorrect for this source when you add an in-text citation or the full citation into your bibliography in Word or Google Docs. In this example, the citation is for a book, but it looks like it's citing it as a [webpage in APA 7th edition](#).

My example sentence with information from another source (*Otitis Media - Books - NCBI*, n.d.).

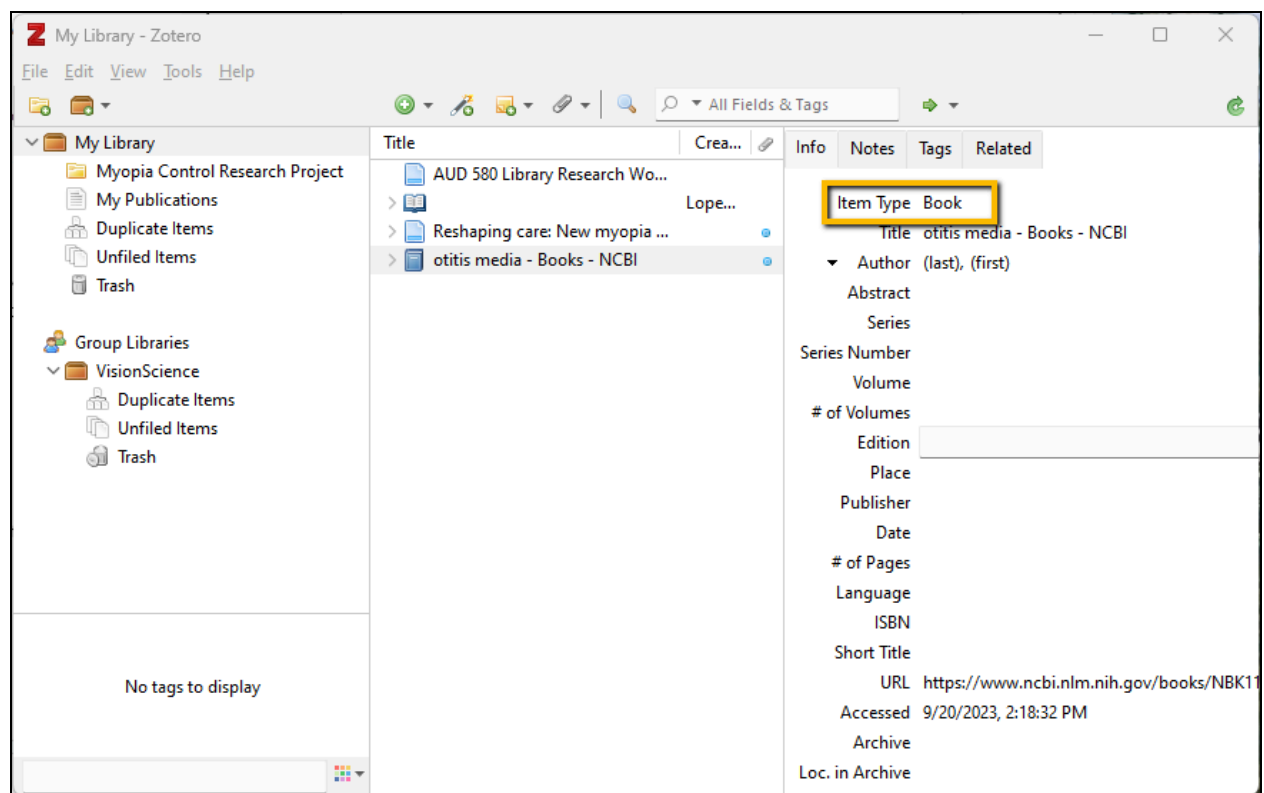
References

Otitis media—Books—NCBI. (n.d.). [Retrospective cohort review]. Retrieved September 20, 2023, from <https://www.ncbi.nlm.nih.gov/books/NBK11812/?term=otitis%20media>

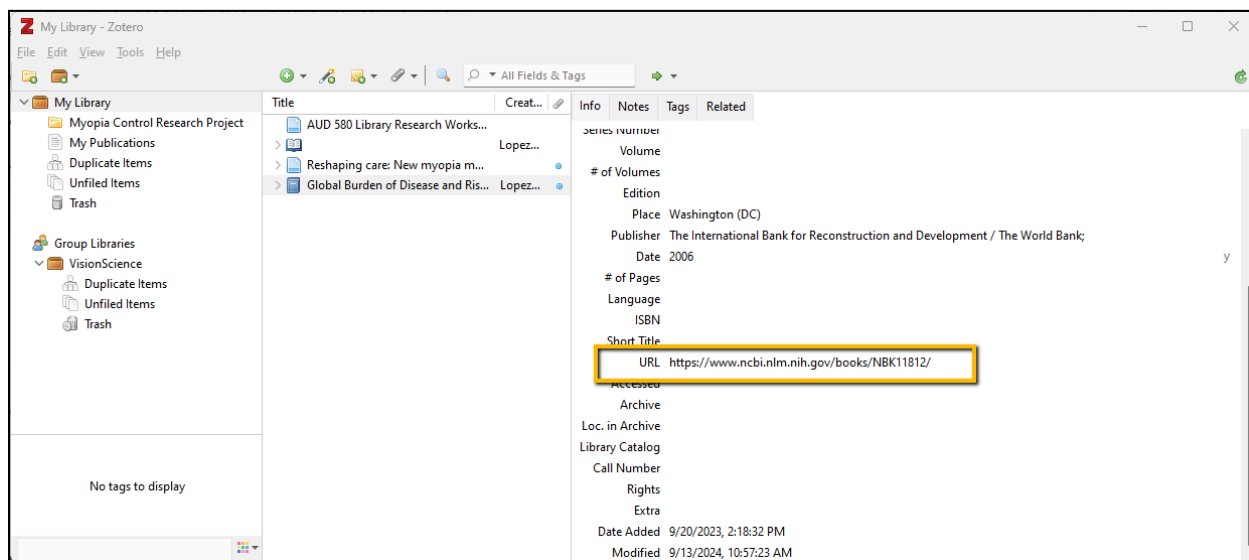
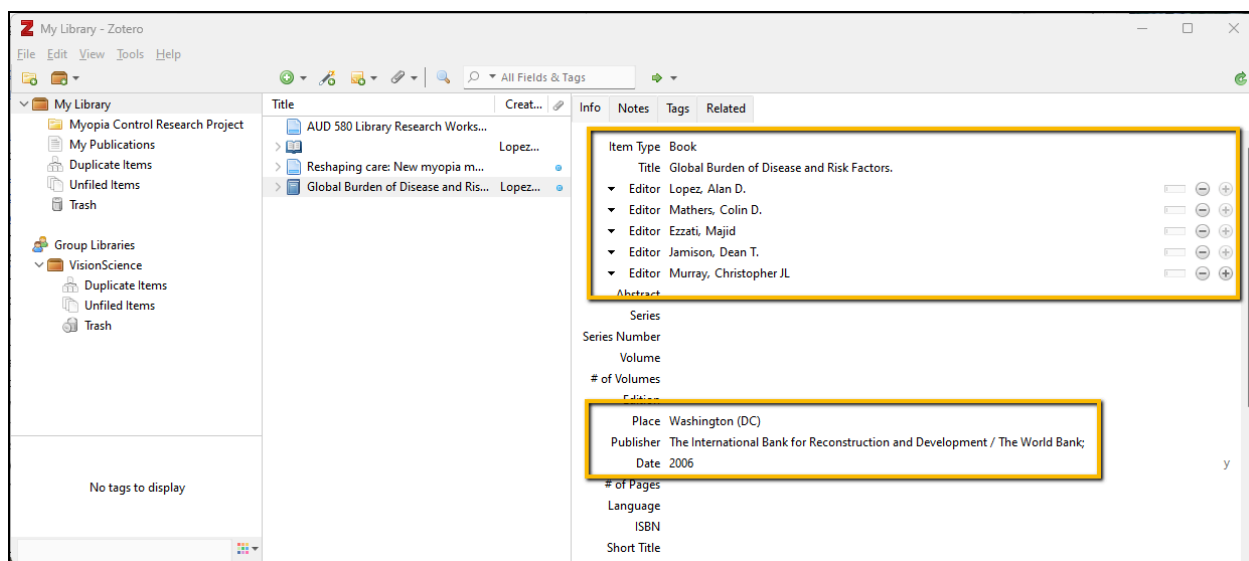
2. Therefore, if you notice that a citation is incorrect when you add it to your paper, you need to correct it at the source in your Zotero app in the *Info* tab for that source. To do this, click on the source in your Zotero app and make sure it's on the *Info* tab.



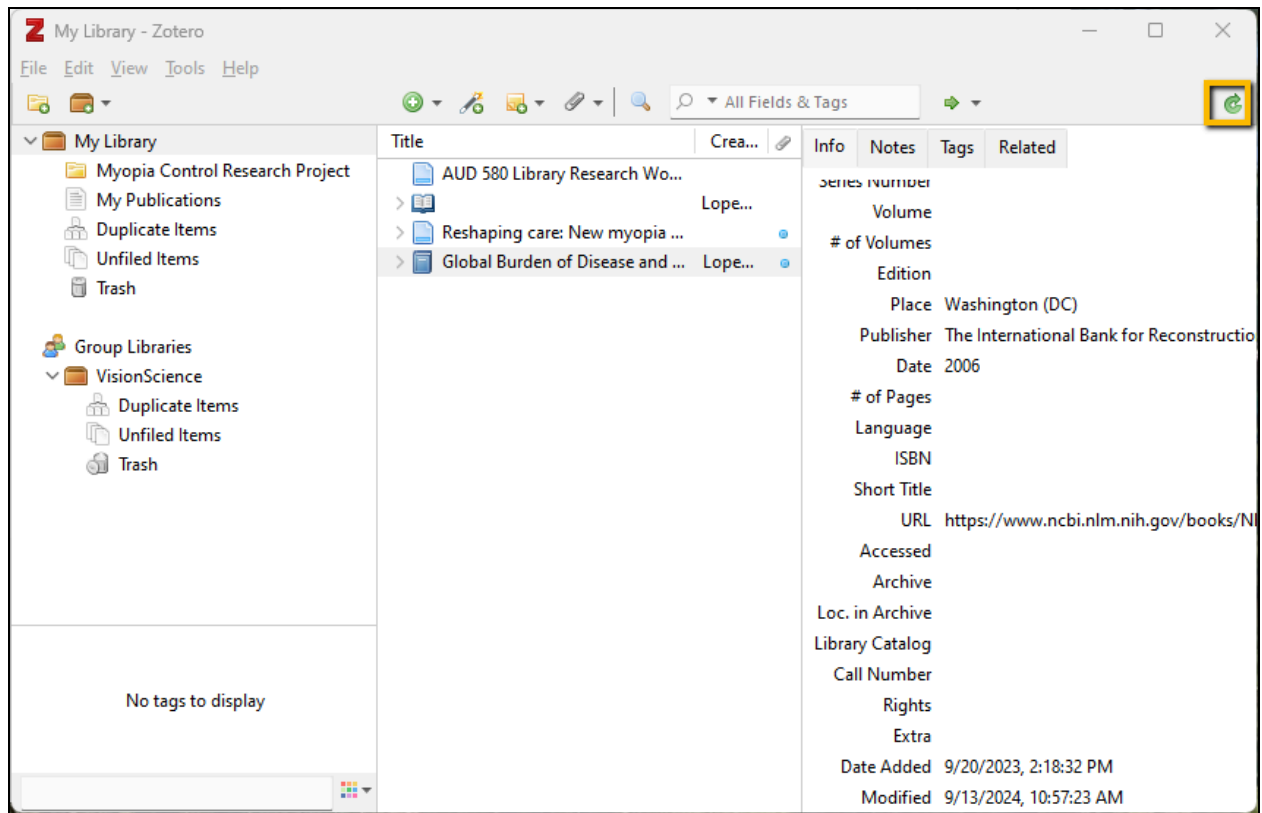
3. Check the *Item Type* to make sure it's set to the correct type of source. In this example, I want to cite a book, but the *Item Type* is listed a webpage. So, I click in the field on *Web Page* and change it to *Book* using the drop-down menu.



4. Next, I need to fill in any missing fields and correct any existing incorrect information. I should also delete any unneeded fields. To do this, I should check the correct citation format for the type of source I'm looking at. So, I'm citing a [book in APA 7th edition](#), so I should check the format to see what information (fields) are needed. I see that I need the authors, publication year, book title, edition information if relevant, publisher, publisher location, and URI if available. So, I will edit that information in each field. All of the fields in this citation were incorrect, so I added all of the correct information and deleted the incorrect information.



- After it has been updated, click the Refresh button to make sure it's updating the information online as well.



6. Now I can try adding the in-text citation and reference list again and see how it turns out. Now it is correct.

My example sentence with information from another source (Lopez et al., 2006)

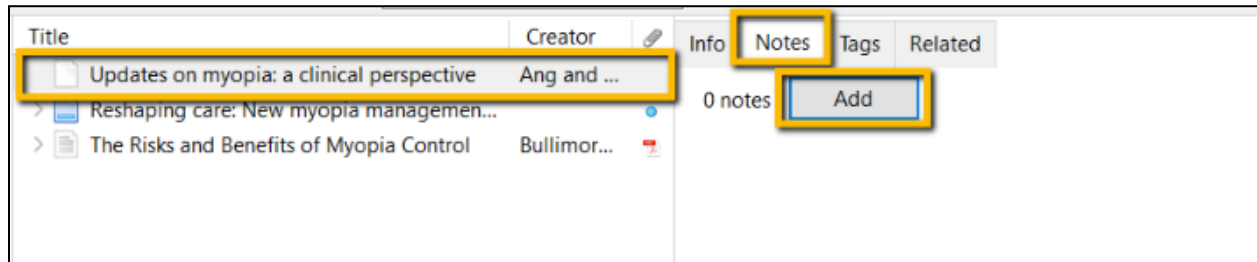
References

Lopez, A. D., Mathers, C. D., Ezzati, M., Jamison, D. T., & Murray, C. J. (Eds.). (2006). *Global Burden of Disease and Risk Factors*. The International Bank for Reconstruction and Development / The World Bank. <https://www.ncbi.nlm.nih.gov/books/NBK11812/>

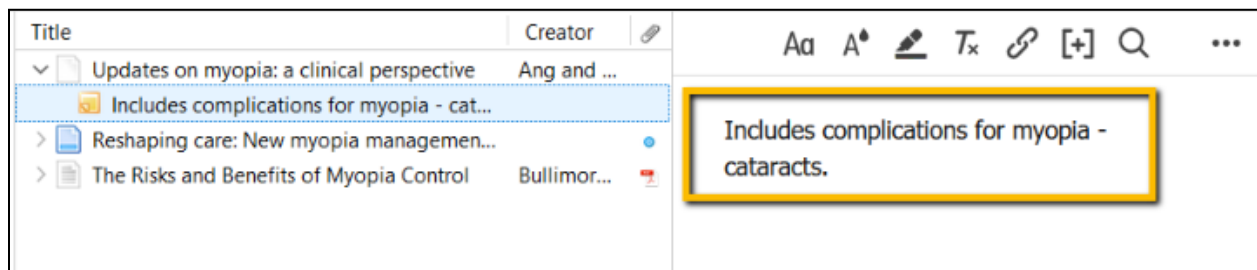
7. If you notice that the problem is that Zotero is not using the correct format for the citation format you have selected (e.g., it is not adding italics or a period where it should), see [Customize A Style Format in Zotero](#).

Add Notes to a Source

1. To add notes to a source in Zotero, go to your Zotero app and select the source. Then click the *Notes* tab in the right pane. Click *Add*.

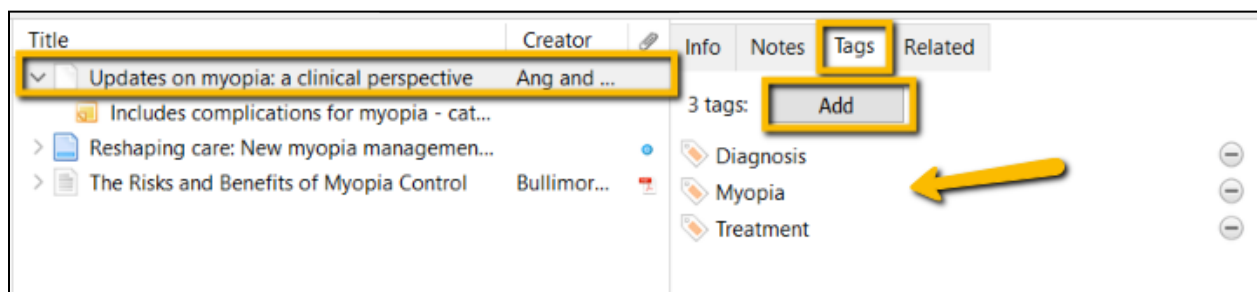


2. Write your note. This is a great place to write notes about a source when you first find it so that when you look at it later, you can remember why you selected it and what information it has related to your research question.



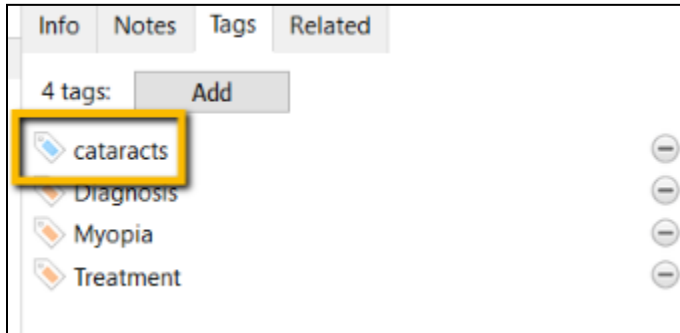
Add Tags to a Source

1. You can also add tags to a source. This can be useful when you or your group members want to search for sources in your library or group library. Some sources will already come with tags which you can keep or delete. In this example, the source comes with three tags: Diagnosis, Myopia and Treatment. To add your own tag, select the source in your Zotero app and click the *Tags* tab. Click *Add*.



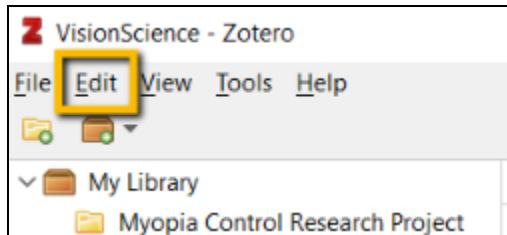
2. Type the name of the tag. Your tag will appear with a blue tag icon. Tags that were provided with the source appear with an orange icon. In this example, I added the tag,

cataracts, because I'm interested in this source for the information it contains about myopia complications with cataracts.

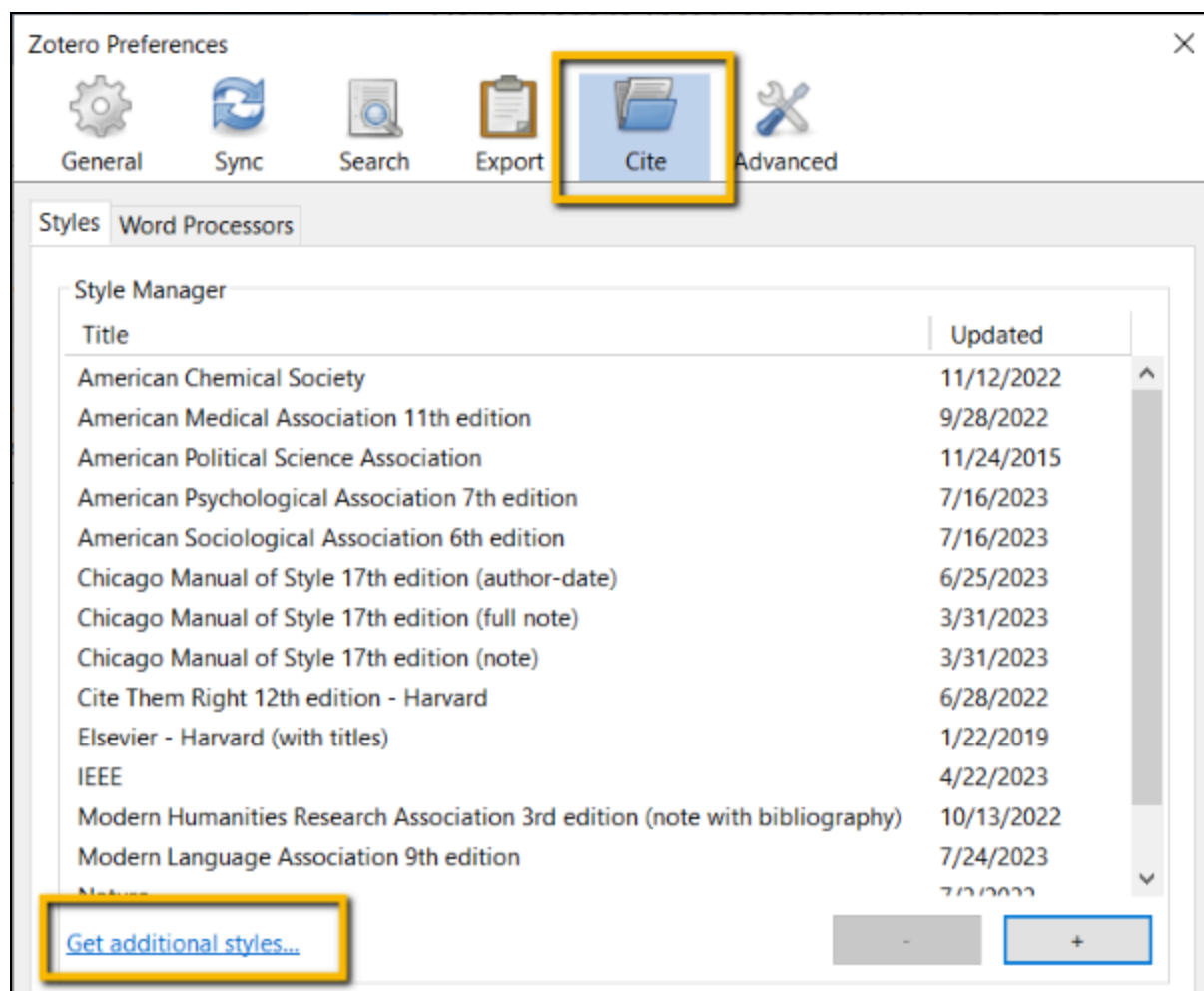


Add Your Preferred Citation Format

1. To add a citation format, to go *Edit - Preferences* in your Zotero app.



2. Click the Cite tab. If you don't see the citation format listed that you need, click *Get additional styles*.



3. Search for your preferred style. Select it from the list. We searched for *International Journal of Audiology*.

Zotero Style Repository

File Edit

Style Search

Format: author-date

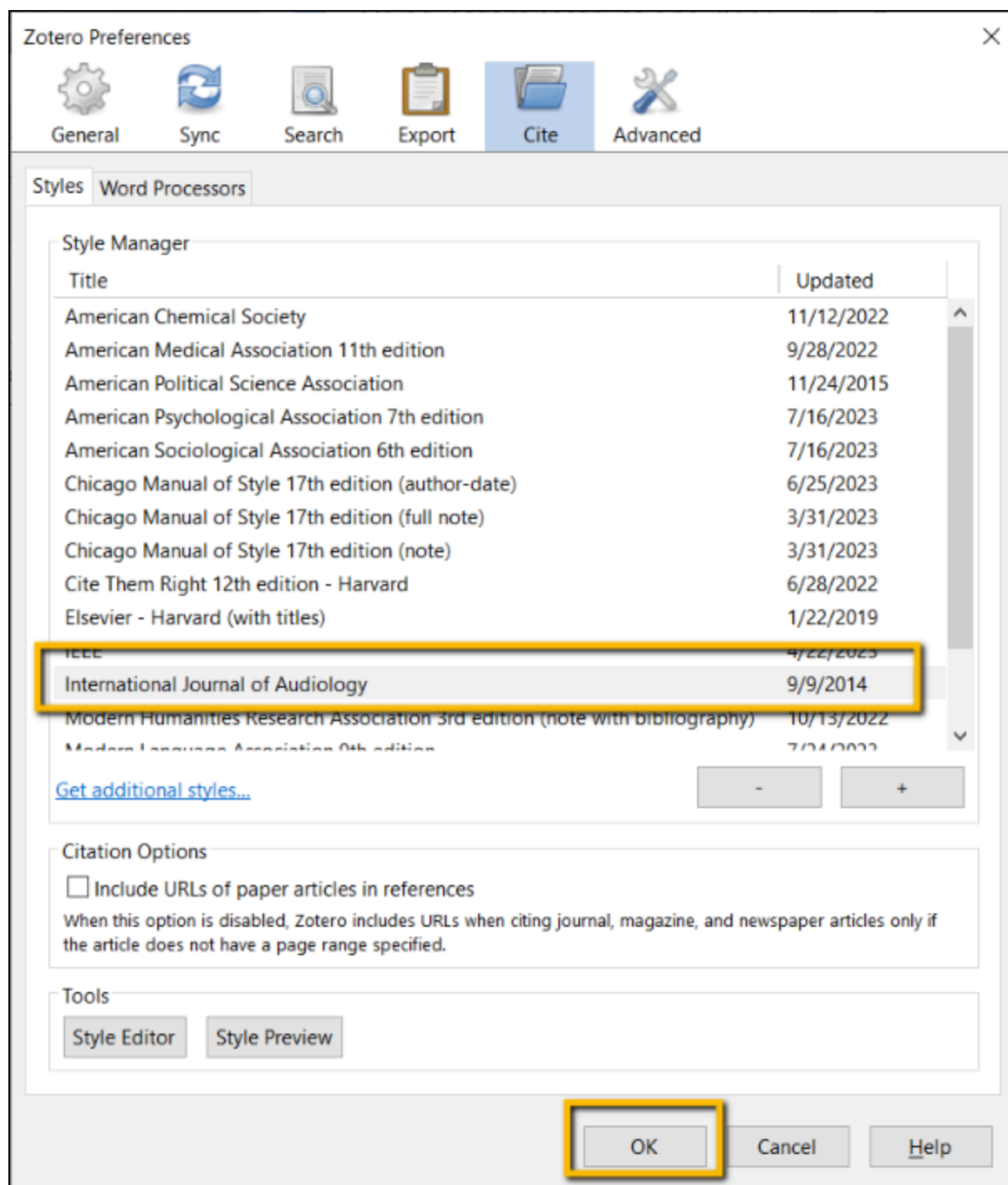
Fields:

☐ Show only unique styles

1 style found:

- [International Journal of Audiology](#) (2014-09-10 06:18:55)

4. We can see that it was added to the list of styles. Click *OK*.



Customize a Style Format in Zotero

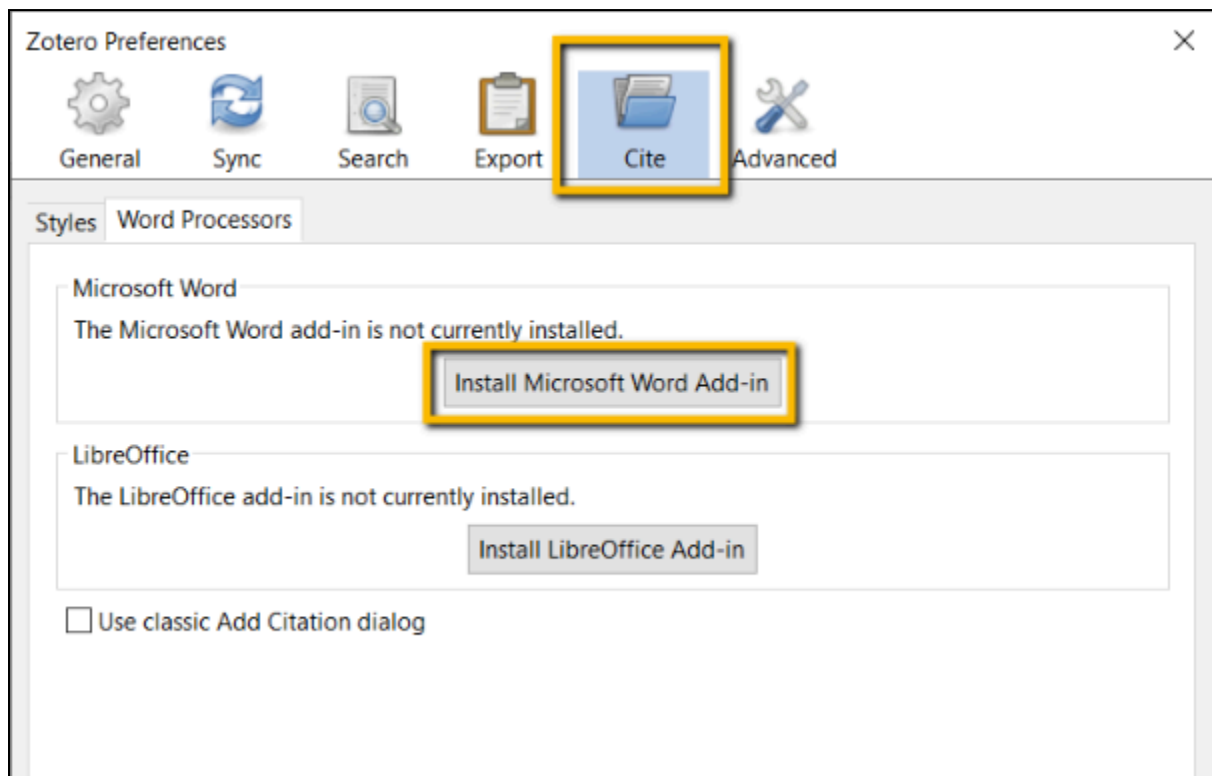
Do you want to create your own customized style format in Zotero? E.g., Maybe you noticed an error in an existing style format in Zotero that you want to correct or maybe a journal you're

submitting to requires an extra field for all citation in the bibliography, such as adding the study type at the end of the citation.

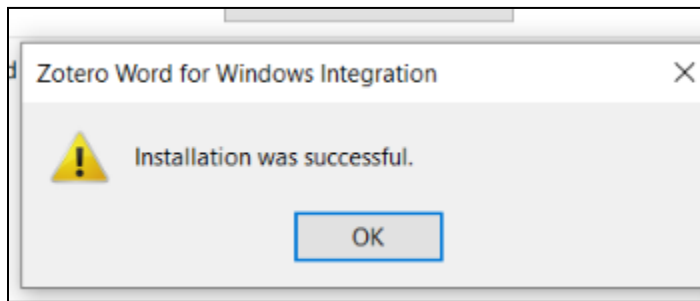
Follow the instructions in the [Editing CSL Styles - Step-by-Step Guide](#). It's not the simplest process, but it's doable. Please reach out to Jennifer Lantrip, Health Sciences Student Success Librarian, at lantrip@pacificu.edu for assistance.

Confirm Zotero Has Been Added to Word

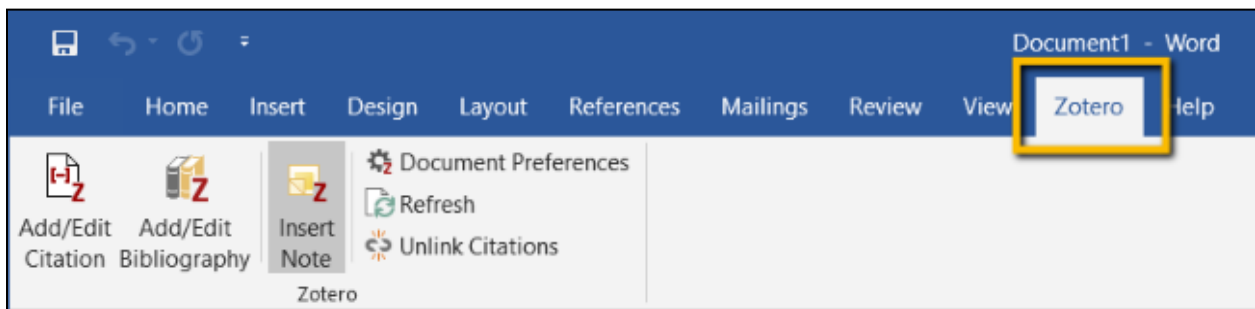
- The word processor plugins are bundled with Zotero and should be installed automatically for each supported word processor on your computer when you first start Zotero.
 - You can reinstall the plugins later from the *Cite - Word Processor Plugins* tab of the Zotero preferences. If you're having trouble, see [Manually Installing the Zotero Word Processor Plugin](#) or [Word Processor Plugin Troubleshooting](#).
 - Read more about [Word Processor Plugins](#)
1. If not already installed, go to *Edit - Preferences* in your Zotero app. Click the *Cite* tab and then click the *Word Processors* tab. Make sure you have closed Word – you can't install the add-in if Word is open. Click *Install Microsoft Word Add-in*.



2. You will receive a notification that it was installed successfully.

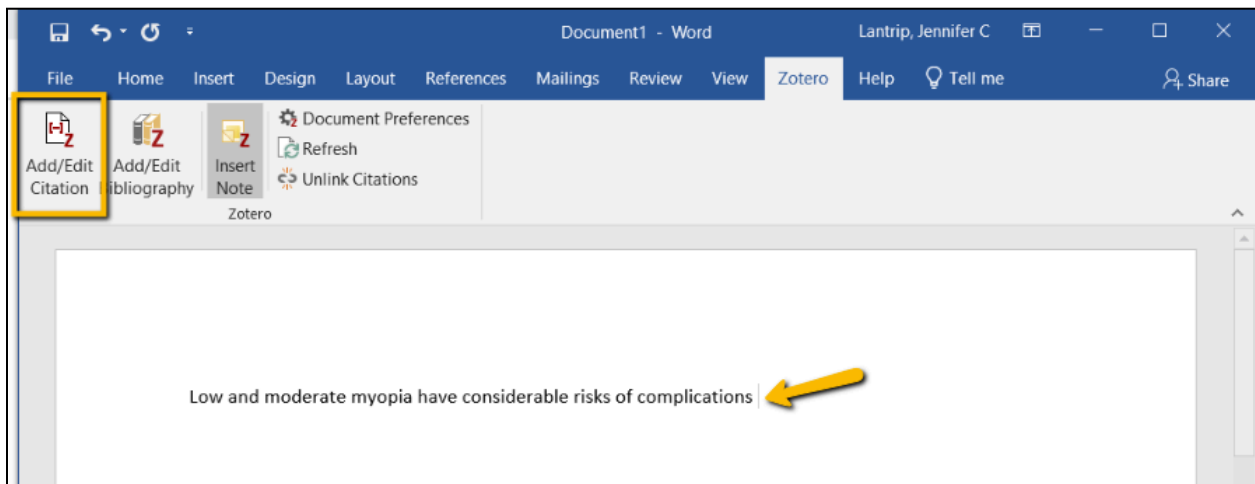


3. Now open Microsoft Word and you should see a Zotero tab in the top-menu.

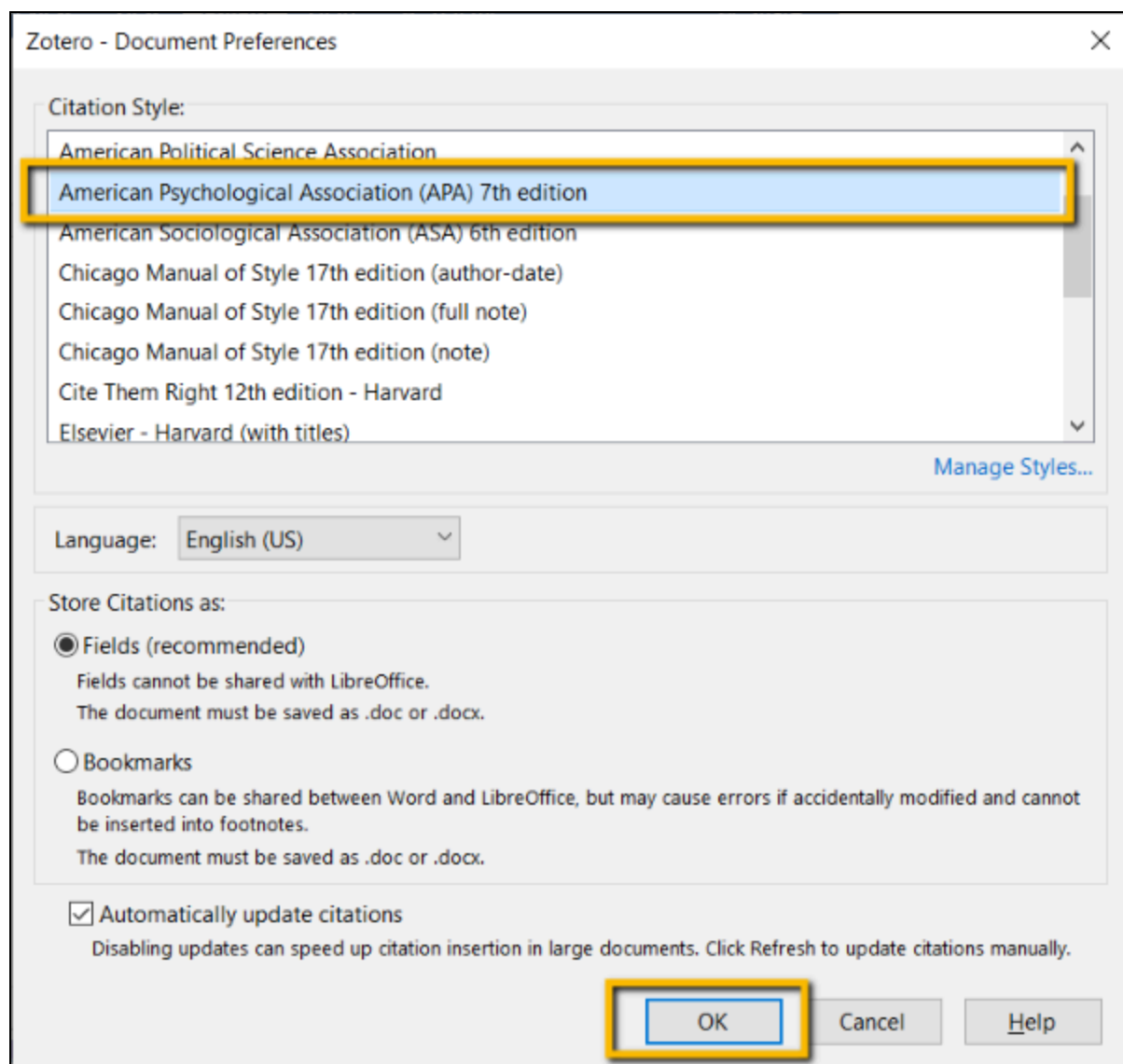


Add In-Text Citations to Your Word Document from Zotero

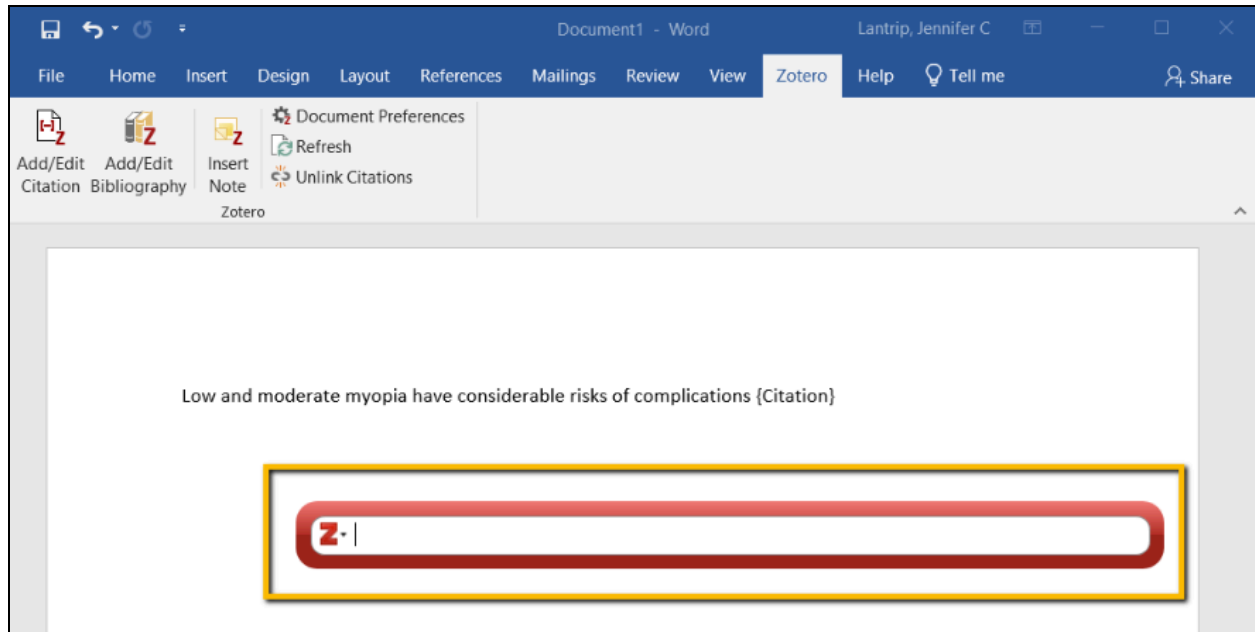
1. To add an in-text citation, click the location in your Word document where you want it to appear. Then click *Add/Edit Citation*.



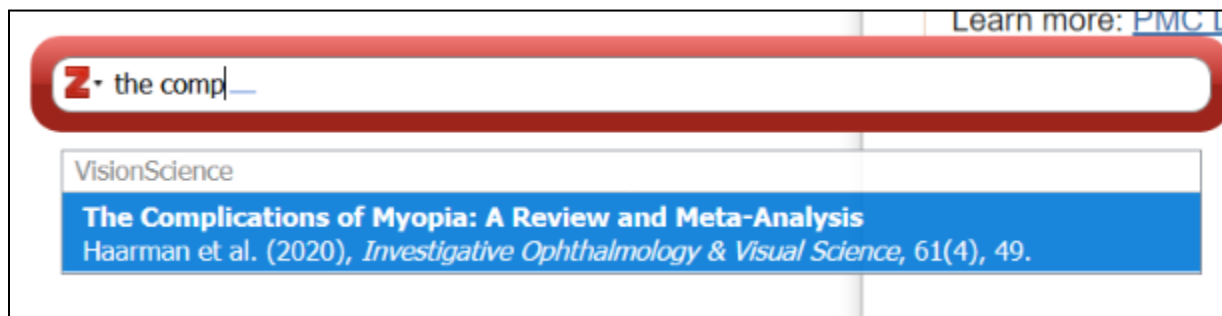
2. Select your preferred citation style and click OK. In this example, I selected APA 7th.

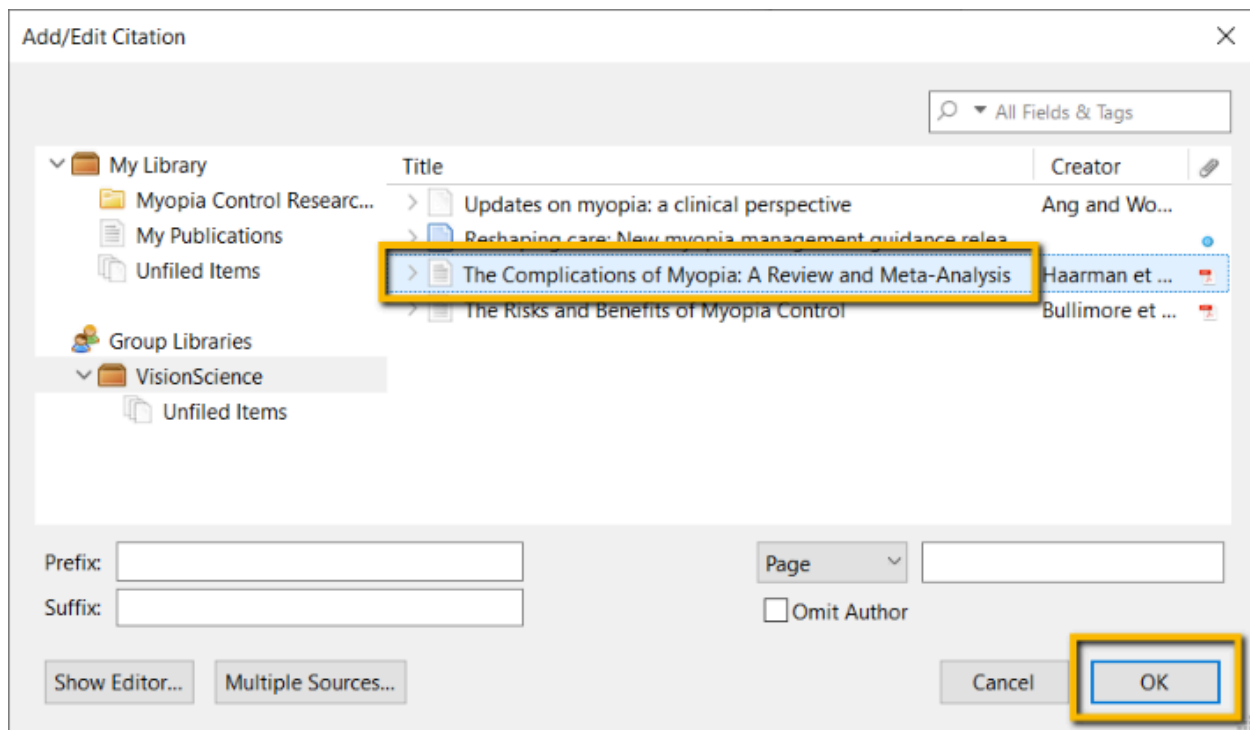


2. A Zotero dialog box will appear for you to select the source that you want to cite.

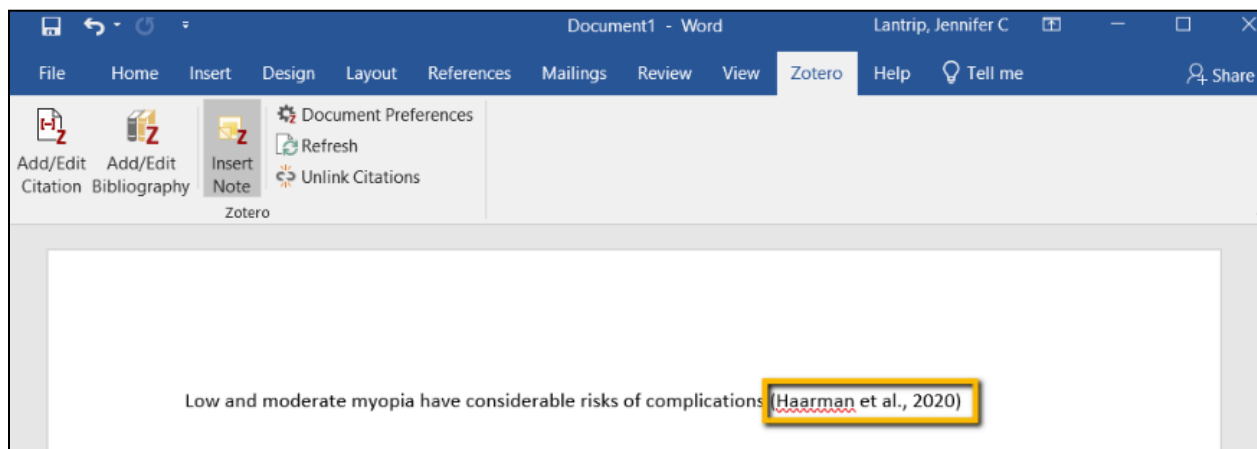


3. You can either start typing in the title, author, or other information included in the source's citation and select it that way, or you can click *Classic View* from the drop-down menu and see all of the sources in your library and select the source that way.



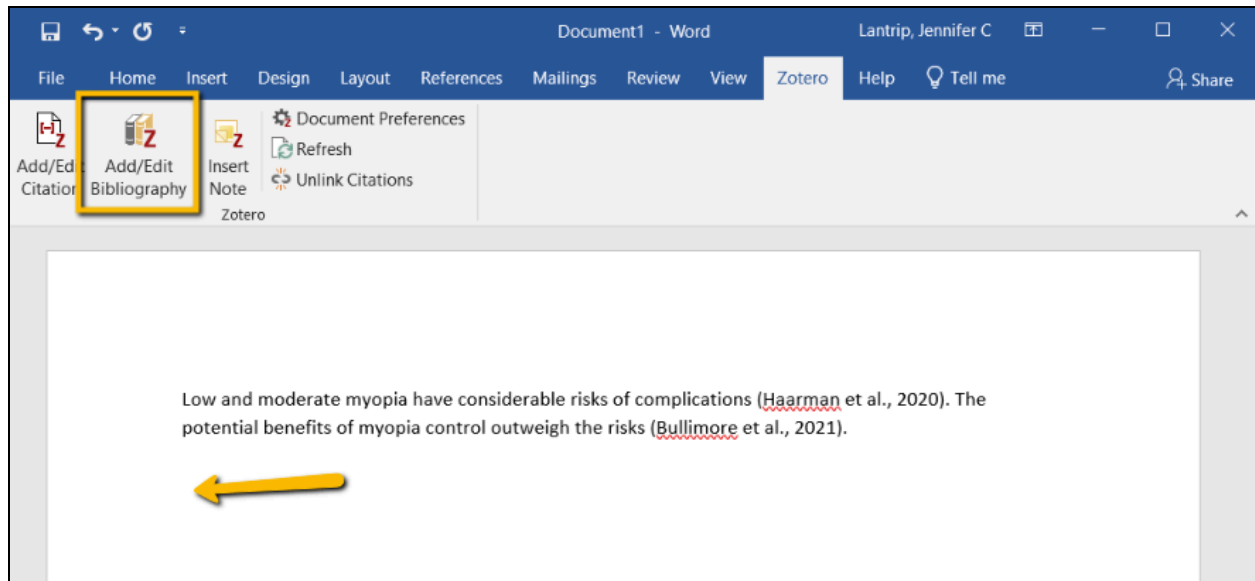


4. You'll see the source added to your paper where you had placed your cursor.

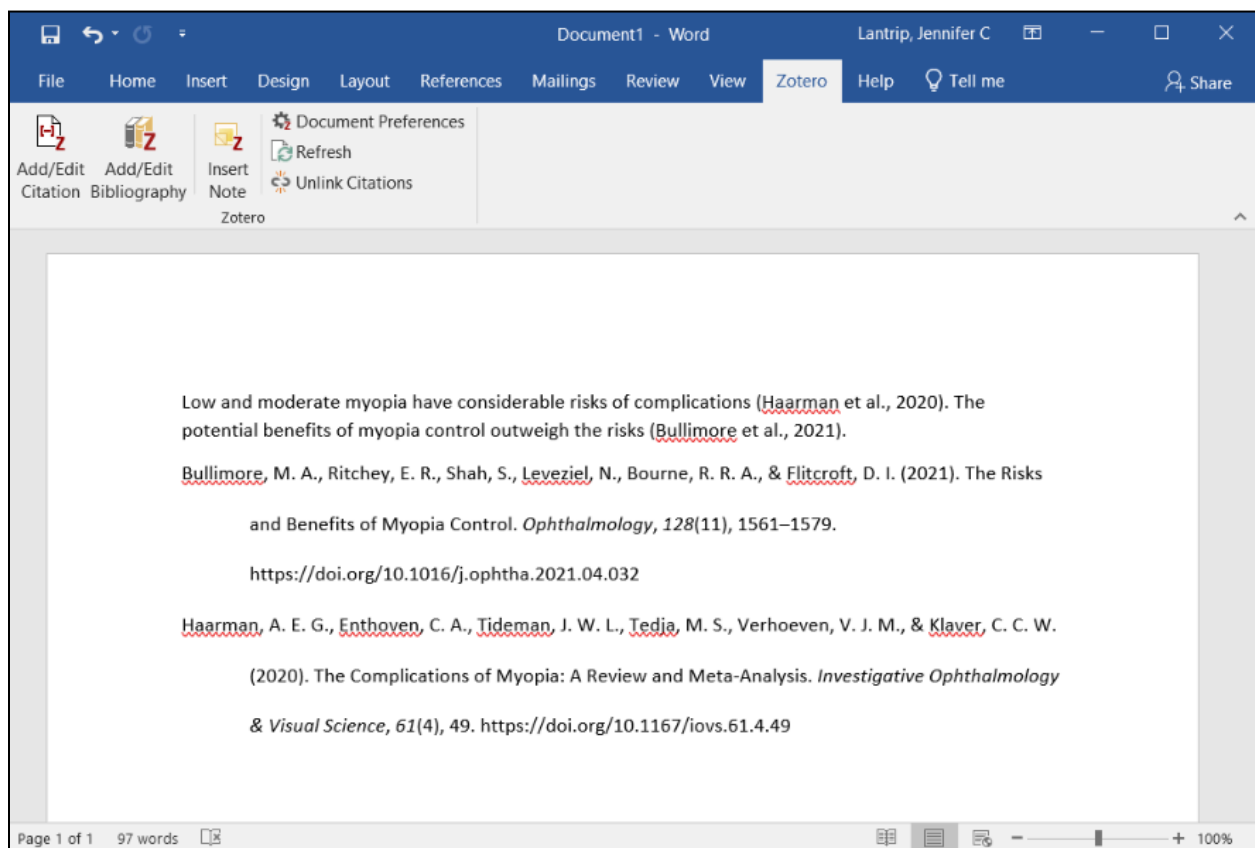


Add Your Bibliography to Your Word Document from Zotero

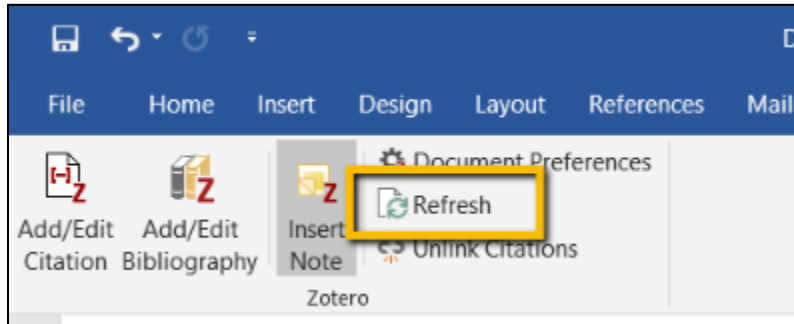
1. After you've added all of your in-text citations into your paper, you can add your bibliography. This will include all of the sources that you have cited in your paper using Zotero. Click the location where you would like your bibliography to appear and click Add/Edit Bibliography.



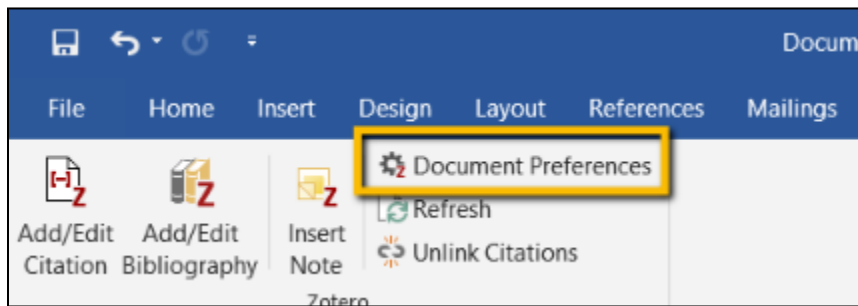
2. The bibliography will appear the citation format that you selected. Notice that I used two sources in my paper and those two sources appeared in my bibliography. Everything is in APA 7th format.



3. If you add or delete in-text citations, click the *Refresh* button to update your bibliography.

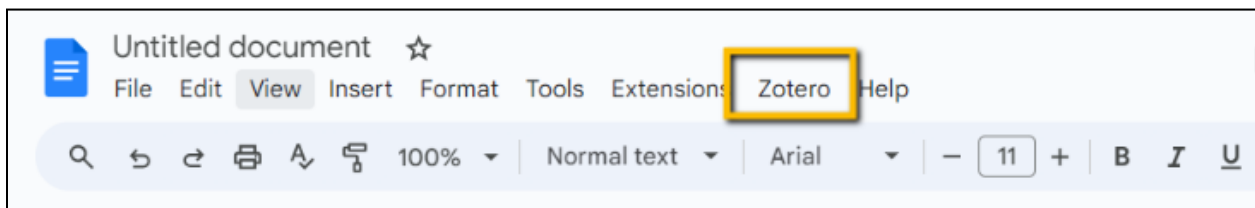


4. To change your citation format, click *Document Preferences* and select your preferred format.



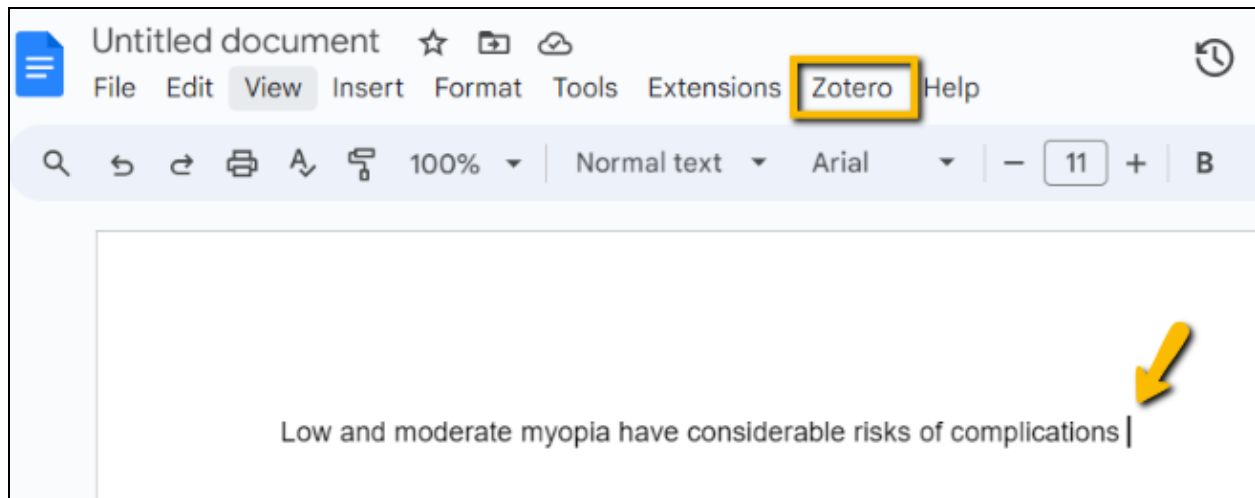
Confirm Zotero Has Been Added to Google Docs

1. The Zotero plugin for Google Docs should already be added when you set up the Zotero connector. When you open up a Google Doc, you should see a Zotero tab.

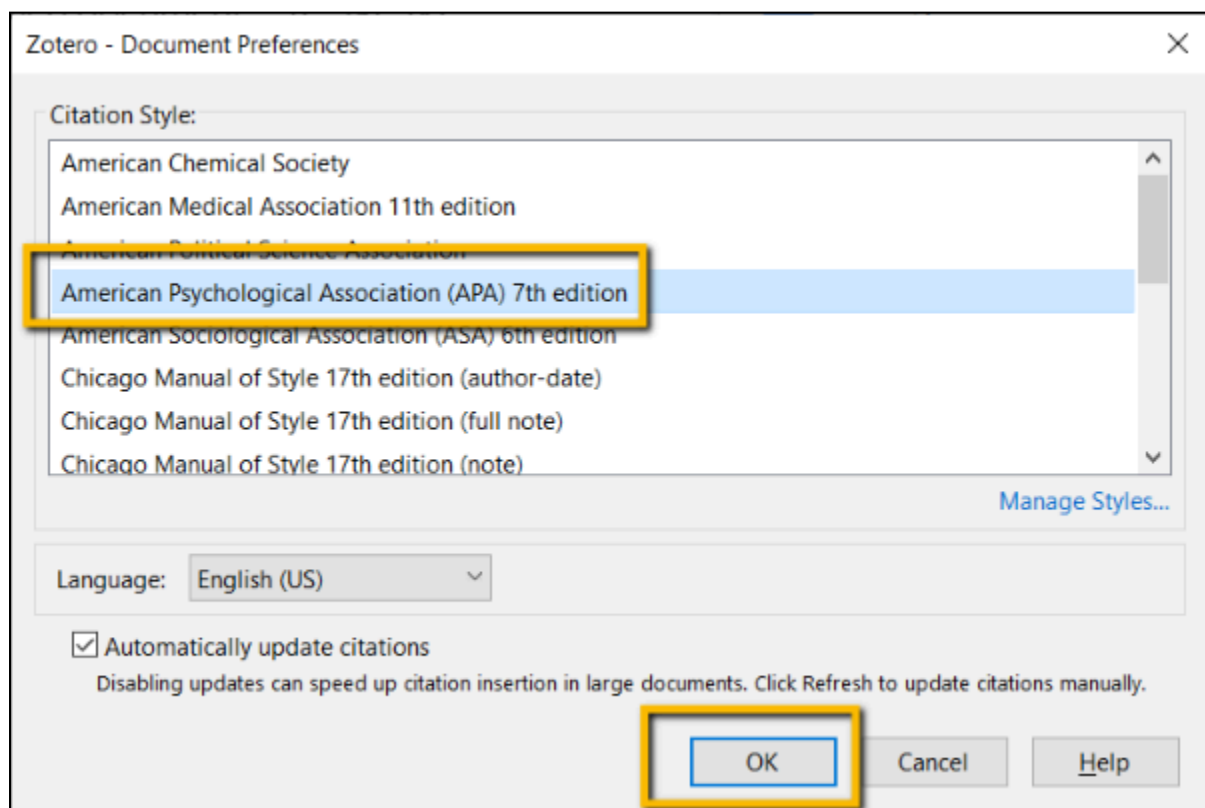


Add In-Text Citations to Your Google Doc from Zotero

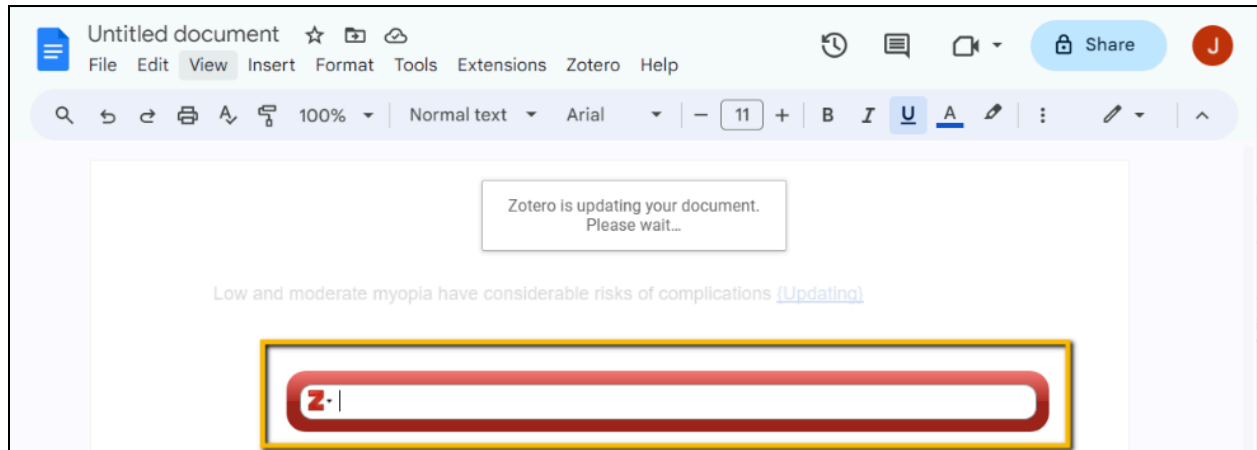
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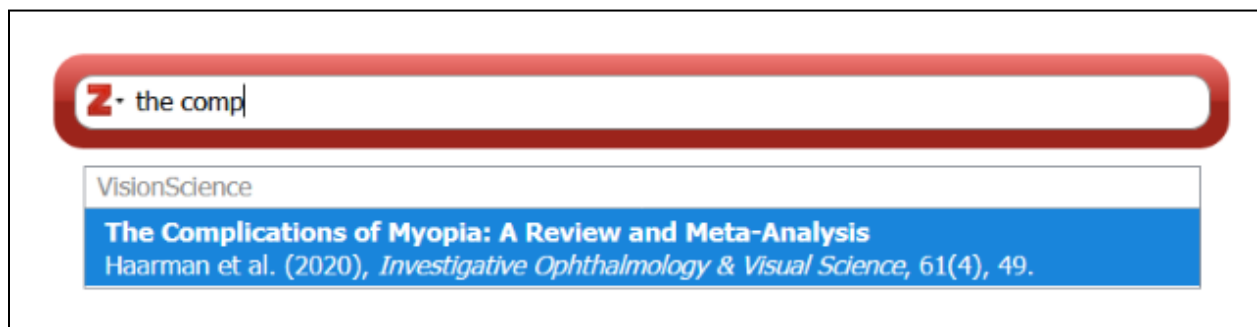
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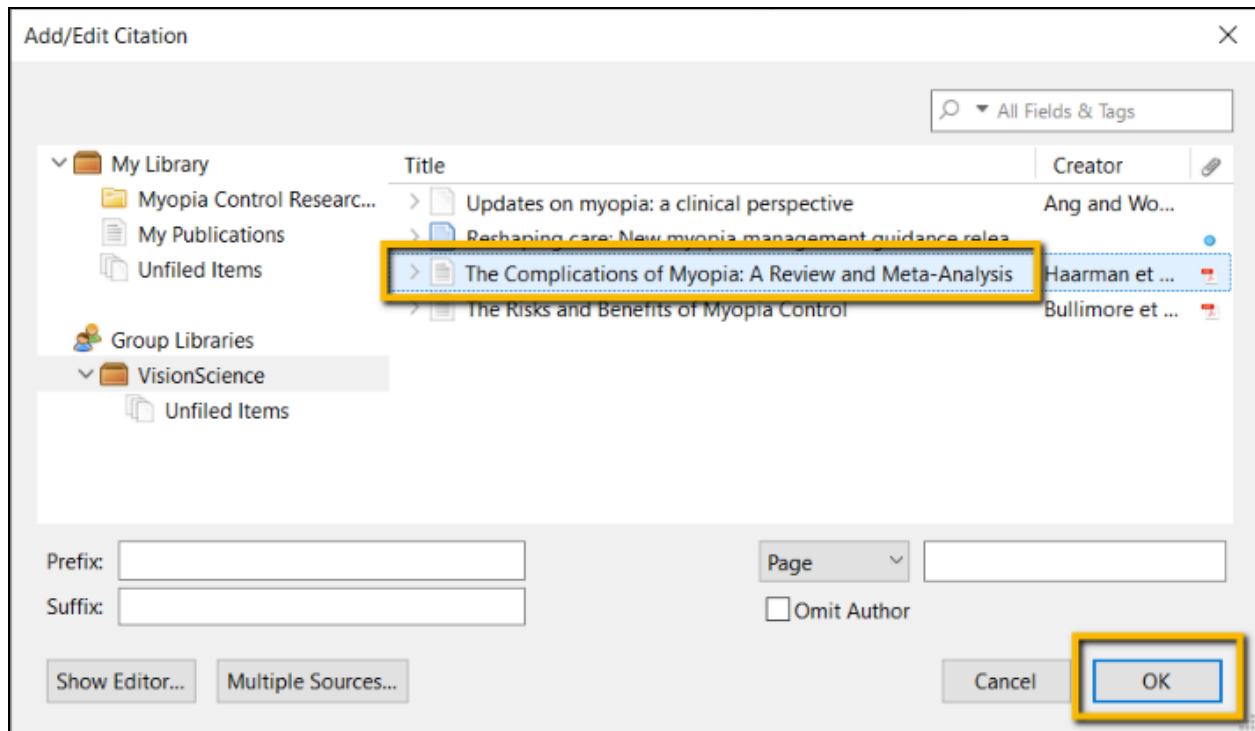


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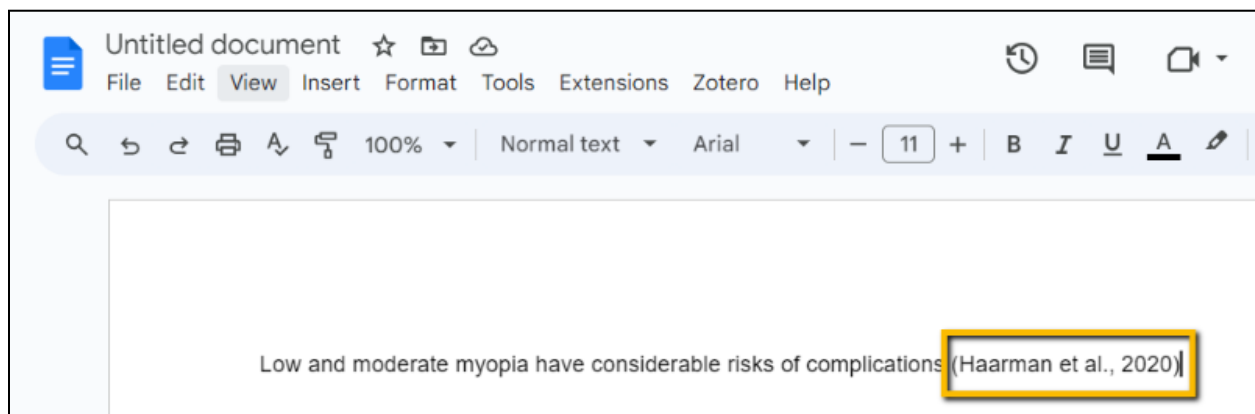


4. You can either start typing in the title, author, or other information included in the source's citation and select it that way, or you can click *Classic View* from the drop-down menu and see all of the sources in your library and select the source that way.



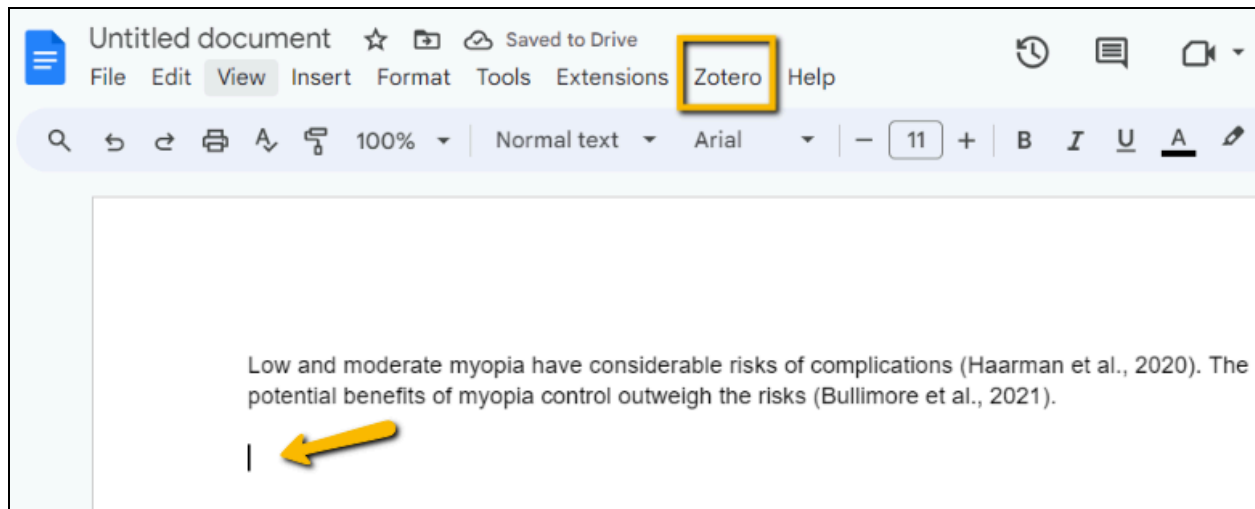


4. You'll see the source added to your paper where you had placed your cursor.

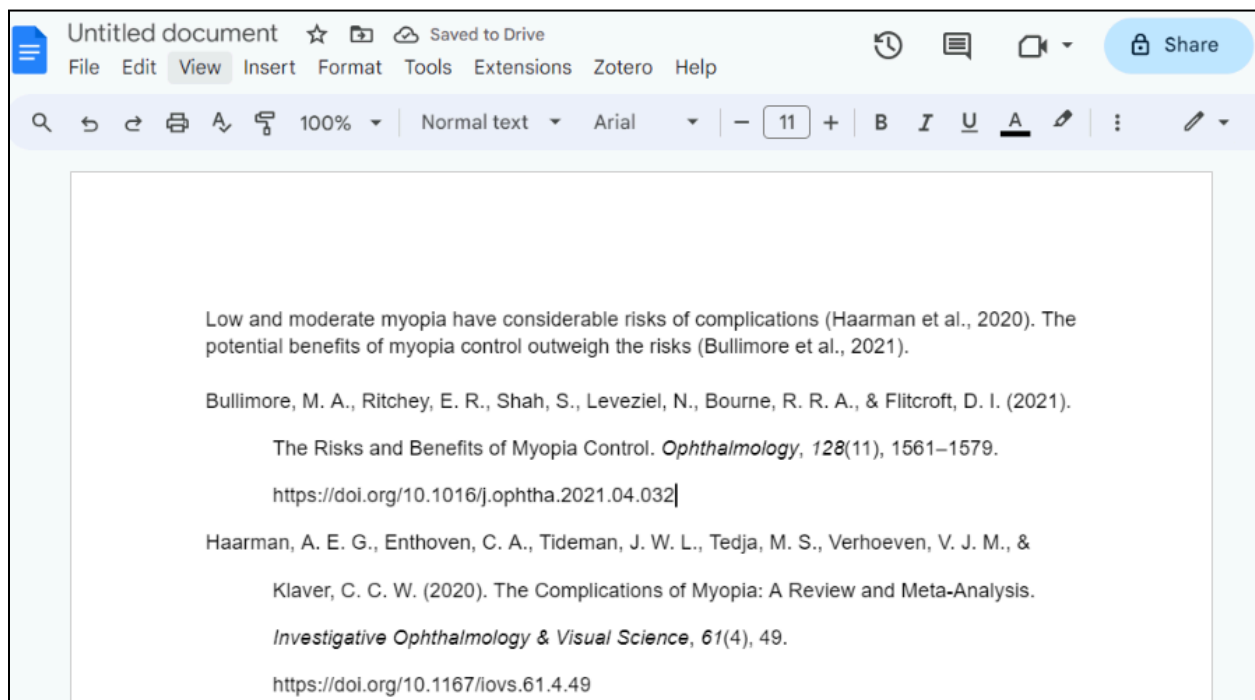


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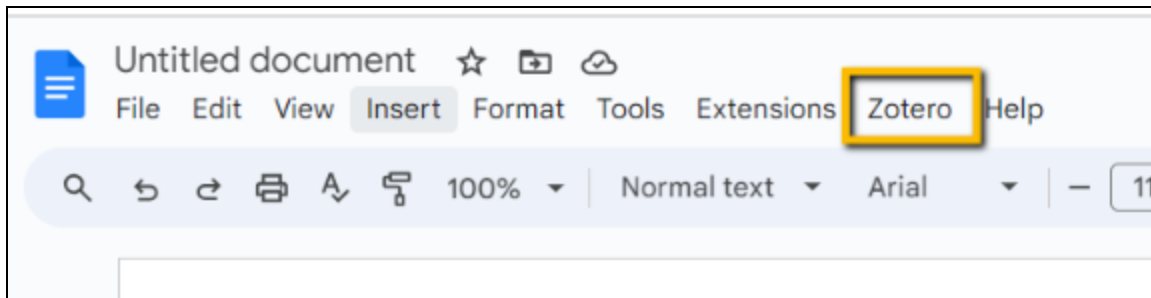
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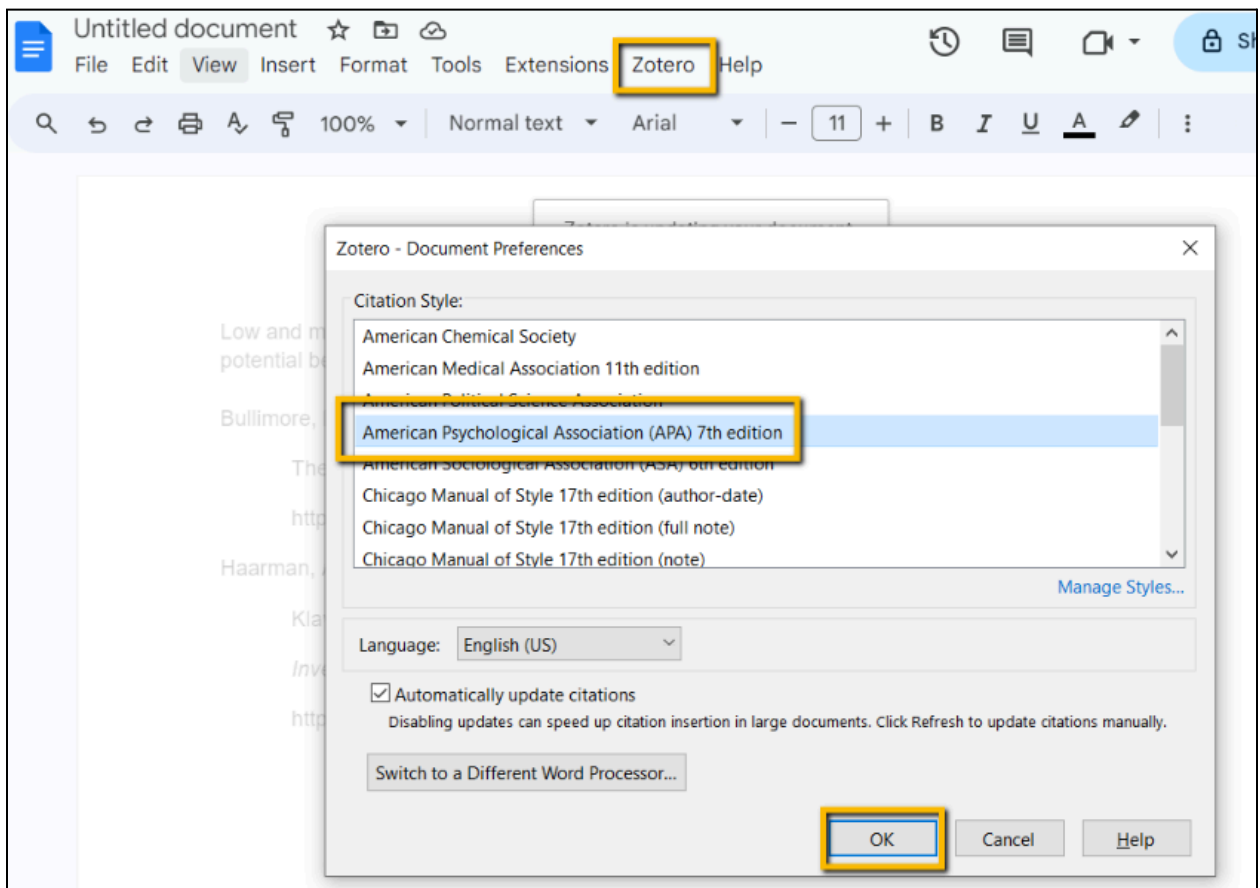
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