

# Zotero Directions

## Install Zotero

1. Go to Zotero.org
2. Click the Download Now button.
3. Choose Zotero Standalone and install it on your computer. Consider adding the extensions for your preferred Internet browsers at the same time.



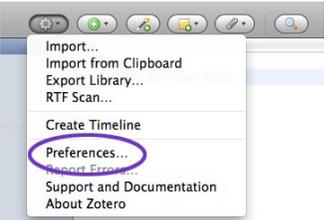
## Find your Zotero login information

If you already have a Zotero account, email Kevin Browne so he can make it an administrator for the UCNRS Group Library.

1. The email in which you received these directions includes your Zotero login and password.
2. Change your login and password after you've logged in to the program for the first time.

## Log in to Zotero

1. Launch the Zotero application. A window on your browser will open asking you to register your Zotero account; ignore it and go back to the Zotero application.
2. Click on the cogwheel button and select Preferences from the drop-down menu. The Preferences window will open.



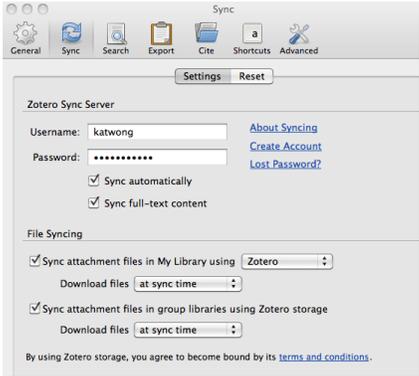
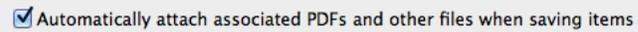
3. Click the Sync button if it's not already selected.
4. Paste in your login and password information. **Make sure all boxes are checked.**



5. Click on the General cogwheel.



6. Make sure the attach PDF box is checked.



7. Close the Preferences window.

## Populate your Zotero account

Synchronize your account with that of the NRS. Consider doing this at the end of the day, as this process can take several hours.

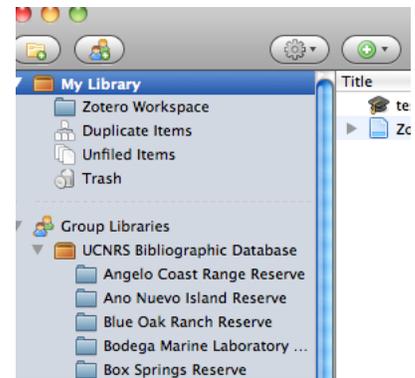
1. In the main Zotero window, click the **green sync arrow** button in the top right corner. As soon as you do this, the arrow will start to spin.



If this is the first time you have logged into Zotero, synchronizing your account will take A VERY LONG TIME, possibly hours. But it happens in the background, and shouldn't disrupt your other computer work. **DO NOT QUIT ZOTERO** while the green sync arrow is spinning. If the arrow stops spinning because you got disconnected, just click it again to continue. You're still making progress.

2. Once syncing is done, the left column in Zotero will now have the **UCNRS Bibliographic Database** under Group Libraries. There is a folder for the bibliography of every reserve.

All publications in the public bibliography of each reserve are in the reserve folders. Kevin and Manuel have worked to ensure that the information for each entry in the UCNRS Bibliographic Database is complete and correct. They did this by associating every publication with its official DOI (Digital Object Identifier), ISBN, or PubMed number; there will be more about this in later steps.



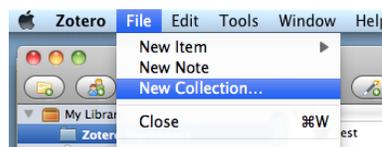
## Add your working folder

Use this folder to store citations on your computer until you're ready to upload them to the UCNRS Bibliography.

1. Open the main Zotero window.
2. Click on My Library at the top of the left column to highlight it.



3. At the top menu, click on File/New Collection



4. In the popup window, type: Zotero Workspace then click OK



## Add a publication to your library

Add a journal paper to your reserve's bibliography to see how this process works.

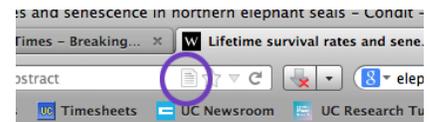
1. Navigate to Google Scholar on your web browser.
2. Type in the title of the publication or other identifying information such as the name of the author.
3. Open the paper on the website of the journal where it was published.

You can add publications to Zotero in two ways:

- a. from your web browser
- b. from the Zotero application

### ...from your web browser

4. If you've added Zotero's web browser extension, you can go to the top of the browser page and click on a tiny icon that looks like a piece of paper. Mouse over this icon and it will say **Save to Zotero**. A message will pop up indicating the paper was saved to your Zotero Workspace folder.
5. When you go to the Zotero application, and click on the Zotero Workspace folder, you'll see the paper in the center column.

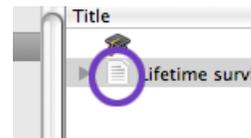


Your *Save to Zotero* icon may be located elsewhere on the browser's menu bar.

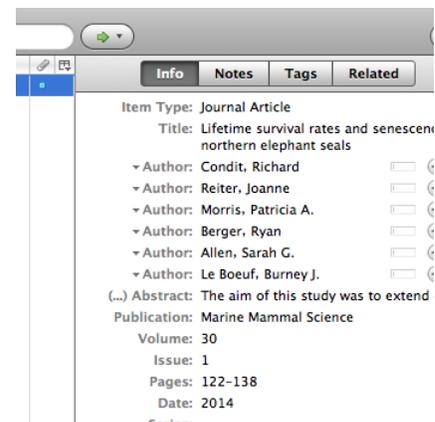


### PRO TIP

If you added the publication while connected to a UC network, Zotero may have added the PDF to the record. Double-clicking the icon opens any attached PDF.



6. The right-hand column contains bibliographic information associated with this paper. Zotero automatically added the title, author, abstract, journal name, volume, etc. because that information was located on the journal's web page. You can add this information yourself when Zotero doesn't upload it automatically. **Always include the abstract.**

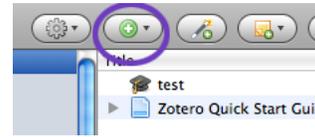


### PRO TIP

Let Zotero fill out bibliography information automatically whenever possible; see **using identifier numbers** below.

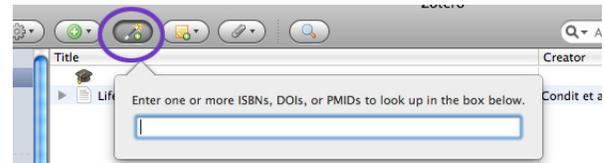
### ...from the Zotero application

4. From the main Zotero window, click the New Item button.
5. Select the type of publication, then type in the bibliographic information in the right-hand column.



### Using identifier numbers

There are other ways to add entries to your bibliography. Clicking the magic wand icon in the main Zotero window lets you type in the Digital Object Identifier (DOI), ISBN, or PubMed ID (PMID) number. With one of these numbers, Zotero can fill in bibliographic information automatically, saving you a lot of typing. Learn more about adding to your Zotero bibliography at: [http://www.zotero.org/support/getting\\_stuff\\_into\\_your\\_library](http://www.zotero.org/support/getting_stuff_into_your_library)



### Adding entries to the NRS Bibliographic Database

1. When you're satisfied with your entry and want to upload it to the NRS Bibliographic Database, click to highlight the paper and drag it to your reserve folder, located in the left-hand column under Group Libraries/UCNRS Bibliographic Database/.
2. The entry can now be seen by all UCNRS Zotero users.

### Changing your login and password

*A good idea for security reasons.*

1. Go to Zotero.org and log in.
2. Click on Settings, located in the upper right of the browser window.
3. Click on Account, and type in your new login and password.



### Zotero Settings



### Additional notes

#### PDFs

Users accessing the NRS's Zotero account from a University of California network can see PDFs of papers from the NRS Bibliographic Database, but users outside of a UC network will not be able to view those PDFs. As an administrator, you will have access to these PDFs.

#### Running out of storage space

If you get a message saying your account is running out of room, and you want to use WEBDAV instead of Zotero to store your bibliographic data, contact Kevin Browne to find out which settings to use.