

Zotero 101

Where do I put my pile of pdfs?

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DIGITAL RESEARCH
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Welcome!

While we're waiting for everyone
to arrive...

Say hello in the chat!

- Where are you joining from today?
- What's your Zotero username?
- What discipline are you working in

Make sure you've got open on your computer

- The Zotero program
- Your web browser
- Word

Learning goals

By the end of today's session, you will be able to:

- Use Zotero to record details about the papers and books that you are reading
- Upload pdf files and add papers from online sources
- Annotate and take notes from papers
- Cite sources in Word using the Zotero plugin

Today's Agenda

00:00 introduction: why Zotero?

00:05 pre-session task troubleshooting

00:15 adding a book to Zotero

00:25 uploading an article

00:30 adding an article from a webpage

00:35 making notes in Zotero

00:45 adding citations in Word

00:55 break

01:00 time to experiment!

01:25 any final questions?

Why Zotero?

The background of the slide features two overlapping rectangular shapes. A light green rectangle is positioned on the left side, extending from the top edge down to the bottom. A pink rectangle is positioned on the right side, overlapping the green one and extending from the bottom edge up to the top.

Pre-session tasks

Were these straightforward?

What issues did you have?

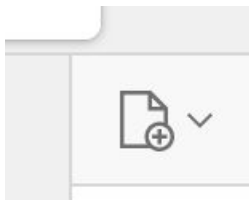
Let's troubleshoot them now!

1. Register for a free Zotero account at <https://www.zotero.org/user/register>
2. Install the program for your OS at <https://www.zotero.org/download/>
3. Install the extension for your browser at <https://www.zotero.org/download/>
4. Install the plugin for Word at https://www.zotero.org/support/word_processor_plugin_usage
5. Find out what referencing system is commonly used in your discipline (if you're not sure, look at the submission requirements for a journal you read a lot).

Adding items

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Adding an item



1. Make sure you're in 'My Library'
2. In the row of icons, click the 'new icon' button and select 'Book'
3. In the info panel, fill in the fields for Title, Author and Date

Uploading a file



1. Download the Raji file from Zoom
2. Make sure you're in 'My Library'
3. In the row of icons, click the 'Add Attachment' button and select 'Add File'
4. Find the Raji file and choose 'Open'
5. Wait for 30 seconds or so

Adding from a browser



1. In your web browser, make sure you have enabled the Zotero extension and that it's visible in the toolbar
2. Go here:
<https://dl.acm.org/doi/10.1145/3442188.3445922>
3. Click the extension
4. Wait for about 30 seconds
5. Now try it with this page:
<https://www.theguardian.com/technology/2025/jan/27/ai-prototypes-uk-welfare-system-dropped>

Notes

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Adding notes

Notes are searchable!



1. Double click on one of the papers we've added
2. You should see the paper on one side, and the metadata on the other
3. On the right hand sidebar, click on the orange notes icon
4. On the 'Item Notes' bar, click the plus sign and select 'Add Item Note'
5. You can type into the notes space
6. You can also select text in the paper and click 'add to note'

Citing in Word

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Selecting your citation format

1. Open a new Word document
2. Choose the 'Zotero' ribbon
3. In Document Preferences, select your citation style
 - a. If it's not there: click 'Manage Styles' and then 'Get Additional Styles' and search for the ones you want

Citing work

1. In Word, enter some text (e.g. “I have read some cool papers”)
2. Click the ‘Add/Edit Citation’ button in the ribbon
3. In the popup, type ‘Raji’ and select the Raji et al paper to cite it
4. Press enter and wait for about 30 seconds

Break: see you in 5 minutes!

Experiment time!

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Why not try...

- ...citing the same paper in different places in a Word document and then clicking 'Refresh' to see how Zotero handles repeated referencing
- ...with your cursor on a citation, clicking 'Add/Edit Citation' and then clicking on the citation name to add page numbers
- ...adding web pages, blog posts, videos from YouTube
- ...uploading other files and adding metadata
- ...changing the referencing style in your document using 'Document Preferences'
- ...adding a bibliography
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Thank you!

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