

Zotero User Guide

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Contents

Introduction	2
Why Zotero?.....	2
Installation and Initial Setup	2
Download and Install	2
Create an Online Account.....	2
Sync Your Desktop and Online Account.....	3
Adding References.....	3
Method 1: Adding by DOI or ISBN	3
Method 2: Exporting from Search Engines and Databases	3
Method 3: Manual Entry.....	3
Method 4: Web Page	4
Method 5: Import by PDF.....	4
Managing Your Library	4
Creating Collections	4
Finding Full Text	5
Making Notes and Annotations	5
Creating Citations and Bibliographies	5
Creating Citations in Microsoft Word	5
Adding a Bibliography.....	6
Backing Up Your Zotero Library	6
Support and Help	6

Introduction

Zotero is a tool for saving and organising your references, adding PDFs and notes, and creating citations and bibliographies. This guide will walk you through everything you need to know to get started.

Why Zotero?

There are several referencing tools out there, so why choose Zotero? Here are three reasons:

1. It is not tied to an institutional subscription: you can take it with you when you leave the University of Leicester.
2. The free version (300 MB) is enough space for doing a PhD or similar project. If you need more space, upgrades are affordable. The 2 GB plan is currently \$20 a year.
3. Corporation for Digital Scholarship have developed Zotero on a non-profit basis for 20 years. If you like to support community-focused software and infrastructure, Zotero is worth your consideration.

Using Zotero regularly will make some tasks more efficient, but it isn't a magic wand. The basic functions are also similar to other alternative products.

Installation and Initial Setup

Although you can access your Zotero library through the official website, we recommend using the desktop version as your primary library. It has more functions than the online version, so you will get more out of the desktop version. You should mainly use the online library as a back-up.

If you want to install Zotero on a University of Leicester-managed computer, then you need to **ask Digital Services first**. If you want to install it onto your own computer, then it is fairly straightforward. We do recommend taking the extra step and syncing with the online account. This is the recommended way of taking a back-up by the developers.

Download and Install

1. Go to <https://www.zotero.org/download/>
2. Choose the version for your operating system (Windows, Mac or Linux).
3. On a Windows machine, run the Setup program that downloads. For other operating systems, see [these instructions](#).

Create an Online Account

1. Go to [zotero.org](https://www.zotero.org)
2. Click "Login" in the top right corner
3. Select 'Register for a Free Account'
4. Use any email address (personal or institutional)

5. Create a minimal profile with basic information

Sync Your Desktop and Online Account

1. Open the Zotero desktop application
2. Go to Edit > Settings
3. Select the 'Sync' tab
4. Enter your Zotero account username and password
5. Choose your sync preferences:
 - Sync automatically (leave this un-ticked if you want to sync manually)
 - Sync full-text content (this will sync PDFs to the online account).

Adding References

You will mainly use Zotero as a place to save your references. Zotero offers multiple ways to add references to your library.

Method 1: Adding by DOI or ISBN

If you want to add a single journal article or book, this is the quickest method. DOI is an industry-standard identifier for academic publications. ISBN is an identifier for books of all kinds. You can find both on the official web page of the publication, or inside the publication itself. For the DOI, copy the string of numbers and letters that begins '10.' You don't need the <https://doi.org/> part.

1. Copy the DOI or ISBN
2. In Zotero, click the magic wand icon ('Add Items by Identifier')
3. Paste the DOI or ISBN
4. Zotero will automatically create a new reference for you.
5. Check the details are correct.

Method 2: Exporting from Search Engines and Databases

You will want to use this method, if you need to save many search results. This method will work for most library catalogues and literature databases e.g. Library Search, Google Scholar, Scopus, Jstor, PubMed etc

1. Select the references you want to export.
2. Look for an export option (usually labelled 'Export' or 'RIS')
3. Choose the RIS file format option.
4. Choose download/export/save.
5. Zotero should automatically prompt you to import the reference.
6. Check the details are correct.

Method 3: Manual Entry

You will use this method for older print-only items, archive materials or physical objects.

1. Click 'New Item' in Zotero

2. Select the appropriate item type (Book, Manuscript, Artwork etc.)
3. Fill in the available reference details.

Method 4: Web Page

Zotero can create references from web pages. This method is most useful for saving references to online news articles, organisational information and blogs.

1. Install the Zotero Connector in your web browser from this page <https://www.zotero.org/download/>
2. Have your Zotero desktop library open
3. When you are on a webpage, click the Zotero Connector icon in your web browser
4. It will create a reference in your library. Check the details are correct.

Method 5: Import by PDF

If you have PDFs of journal articles already saved on your computer, you can use them to create new references in Zotero. If your PDF is really a photocopy/scan, or does not have a DOI or ISBN on the front page, this process may not work.

1. To import PDFs, simply drag and drop the files into My Library (hover over the My Library heading on the left-hand side, or, if you have a blank library or collection, into the main panel).
2. For journal articles, Zotero will try and extract reference information automatically and create a new reference. It will take a few moments. The PDF will become an attachment to the reference.
3. Check the details are correct.
4. If the process hasn't worked, right click on the file and choose **Create a Parent Item**. You can then search using a DOI or ISBN, or create a manual entry.

Managing Your Library

Over the course of a project, you may want to organise your references into folders or groups. For example, you might want a folder for your literature review and a folder for methods. Or one for archive documents and one for secondary sources. In Zotero you can do this by using the **Collections** function.

Creating Collections

1. Right-click on 'My Library'
2. Select 'New Collection'
3. Name your collection
4. Drag and drop references into the collection
5. Create sub-collections for more detailed organization.

Finding Full Text

Zotero can help you download and save the full-text of journal articles.

1. Right-click on a reference
2. Select 'Find Full Text'
3. Zotero will search open-access databases and attach a PDF copy of the article.

To help Zotero find the maximum number of PDFs, let it know you have access to the University of Leicester Library subscriptions:

1. Go to Edit > Settings > General
2. Scroll down to Locate. Resolver should be 'Custom'.
3. In BASE URL, add this link:
https://le.alma.exlibrisgroup.com/view/uresolver/44UOLE_INST/openurl?
4. Close the settings the window.

Making Notes and Annotations

You can keep notes on the literature you are reading in Zotero. In the reference information panel about an item, there is an option called Notes (either on the right-hand side, or at the bottom of the panel) where you can write free text. It also has some basic formatting options. If you save PDFs, you can add annotations to the files you have saved. When you open a PDF, in the viewer you have options for highlighting and adding text annotations. If you do decide to keep your notes in Zotero, make sure you take a regular back-up.

Creating Citations and Bibliographies

Some people may just use Zotero to keep references and notes. But you can also use Zotero to create citations as you write in Microsoft Word and then create a bibliography/reference list at the end of your document.

Creating Citations in Microsoft Word

If you have installed Zotero successfully, it will have installed a tab to Microsoft Word. When you want to create citations:

1. Open Zotero.
2. Open Microsoft Word
3. Look for the Zotero tab along the top ribbon.
4. Go to **Document Preferences**. Select your preferred citation style. For an author date style, we recommend **Cite Them Right 12th Edition – Harvard**. This is the closest style to the University of Leicester Harvard guide. For the University of Leicester Footnote style, download the file from [our webpage](#) and then install in your Zotero. You can also use APA, Chicago, MHRA, Vancouver and MLA.
5. To add a citation:
 - a. Click 'Add/Edit Citation'
 - b. Search your library
 - c. Select the reference and then click OK.

If you are using a footnote style, Zotero will create the footnote for you, as well as adding the reference in the right place.

6. To add page numbers:
 - a. Click on the citation
 - b. Use 'Add/Edit Citation' to include the page numbers. In the box called 'Page', just write the number: the style will add 'p.' or ':' for you.

Adding a Bibliography

Zotero can create a bibliography or reference list for you containing everything you have cited via the Zotero tool in the document. To do this:

1. Place your cursor at the end of the document.
2. Go to the Zotero tab and then **Add/Edit Bibliography**
3. A reference list in alphabetical order will appear. If you want to change the formatting and layout you can do so using the normal Word functions.

Backing Up Your Zotero Library

If you are using Zotero for your PhD or a research project, you should back up your library as you would your other materials. Every time you make a substantive change to your library, you should make a back-up. There are several ways to do this:

1. Regular synching between the desktop version and your online account. How do this is described on page 2 of this document. This is the recommend way of taking a back-up by the developers of Zotero.
2. Take a manual backup. Locate the Zotero library files on your computer and copy to an external hard drive or cloud storage. Be careful when you do this that you only make a copy and don't alter the installation on your computer.
3. To save a copy of the **references only** go to File > Export Library. Change the format to **RIS**. This file format can be opened in any reference manager (e.g. EndNote or RefWorks). Save the file on an external hard drive or cloud storage. This method will **not save** the folder structure, or the PDFs and any annotations.

Support and Help

- Official Zotero documentation: <https://www.zotero.org/support/>
- User Forum: <https://forums.zotero.org/discussions>
- What's new in version 7: <https://www.zotero.org/blog/zotero-7>
- Email: librarians@leicester.ac.uk if you have quick questions, or you want to arrange a 1-2-1 appointment.