

# **UNL PSYC350 Lab: Using Zotero to Streamline Citations & References**



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## Using Zotero to Streamline Citations & References

All about the Zotero.

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# Overview


This workbook and guide is intended to provide an overview of how to use Zotero for organizing and citing references in academic research for UNL PSYC 350 Lab students.




**Part I**

**Zotero Basics**

# 1 Overview

## 1.1 What is Zotero?

Zotero is a free and open-source  citation manager designed to collect, store, share, organize and cite references.

Zotero works with various operating systems  or  or  and allows you to download references into a personalized library and then create properly formatted in-text citations and bibliographies.

Zotero also enables you to store all your PDFs, notes, and citation meta-data (i.e., information you include in the formatted citation) in the same centralized location (or synced across all your devices using a free online account).

## 1.2 Why use Zotero?

Any time we use information from an article, report, or other source, it is important to:





-  **give** credit to others work
-  **add credibility** to your work
-  **provide** context for your work
-  **direct** audience to other work



Figure 1.1: Live reenactment of a student trying to keep track of their references by hand

In other words, properly citing our sources plays an important role in the scientific writing process. But it also results in one of the most tedious tasks that is a part of writing: creating those citations and a reference page.

Psychology, as well as a number of other fields, have largely adopted a very specific format for references called APA format. Unfortunately, there are hundreds of different kinds of sources, and each has a specific way to cite that source. It can be a nightmare to even find the right formatting for the source you have.

Fortunately, there are software packages that can assist us with this task!


Zotero is one such program (collectively referred to as reference managers). Zotero is not the first program of its kind; nor will it likely be the last. But as of the writing of this guide it is the most attractive (and free) option for academics and students to use.

Zotero is widely used. It is also **free**, open-source, and easy to use. Even better, there is a plugin for Microsoft Word and other word processors that makes creating citations and entire reference pages as easy as clicking a few buttons!

In this lab, we will use Zotero to learn about APA 7 formatting for our final project; but the program is versatile and can also be used in other classes!

### 1.3 What does Zotero do?

Most other citation managers require you to purchase licenses to use their features effectively. But Zotero is built and maintained by a community of people who believe in the value of open-source software. There are multiple benefits to this approach including:

- All the source code is available on Github 
- You do not need institutional credentials to access your account or export your library
- Harnesses the power of the open-internet and an active world-wide user community that has created a range of plugins and add-ons to extend its functionality
- Provides license-free integration with word processes like LibreOffice, Microsoft Word, Google Docs, and RStudio

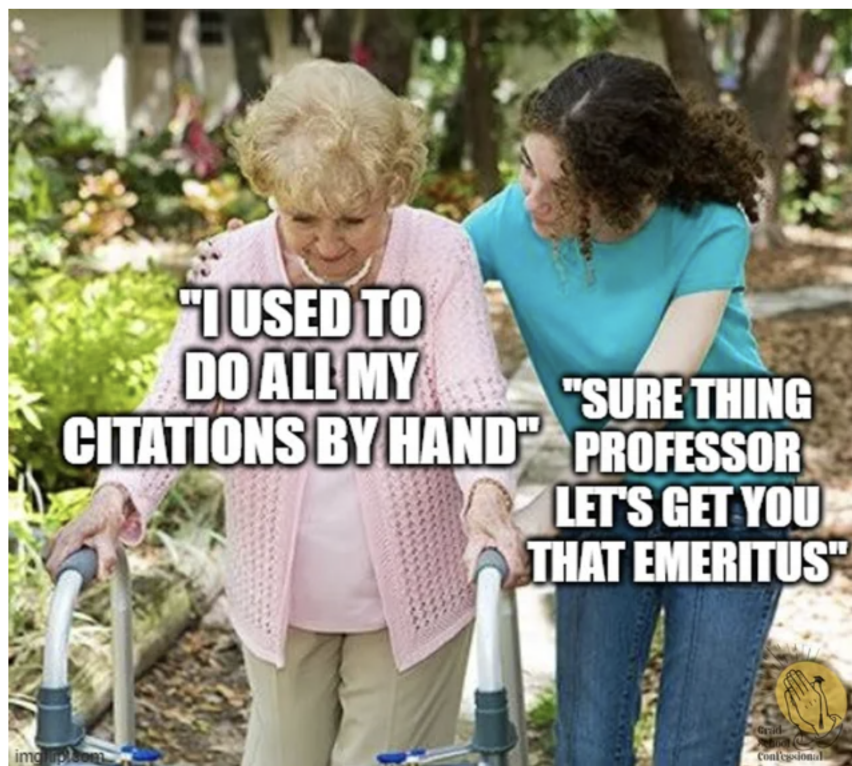


Figure 1.2: Meme of an elderly woman with a walker saying I used to do all my citations by hand while a younger woman replies Sure thing professor, let's get you that emeritus

Zotero also enables you to store all your PDFs, notes, and citation meta-data (i.e., information you include in the formatted APA or Bluebook citation) in the same centralized location (or synced across all your devices using a free online account).

This guide walks you through how to set up Zotero and take advantage of its many features.

## 2 Getting Started

### **NEW!**

#### **Zotero 8 released January 2026!**

Read about what changed [here](#). Highlights include a new unified citation dialog, built-in themes (Dark, Snow, Sepia), and automatic attachment filename syncing.

If you're already running Zotero, you can upgrade from within Zotero by going to Help → "Check for Updates..."

### 2.1 Step 1: Download & Install Zotero

There are four things you want to do before you can use Zotero effectively:


1. Download and install the program from the Zotero website
2. Create a Zotero account (required to sync across devices & use shared-library features)
3. (Optional) Set-up & configure RStudio or [Word integration](#)
4. (Optional) Install (preferred) Internet browser extension

Download Zotero [HERE](#)

### 2.2 Need help?

Zotero has extensive online documentation that can help you with [specific questions or issues](#).

You might also want to check out the [Zotero Quick Start Guide](#). It likely has an answer to your question!

 If for some reason you cannot or refuse to download the Zotero program, [ZoteroBib](#) offers a free in-browser solution to creating a bibliography.

## 3 Using Zotero

### 3.1 Add a collection

A collection is like a folder. You will want to create a new collection for each project or paper you are working on.

### 3.2 Add an item

Adding articles (or other items such as book chapters) to Zotero couldn't be easier. Simply open Zotero, then drag and drop the pdf into "My Library" in the left panell. You can set up different "collections", which is helpful to organize references by class assignment, for example, but this is not necessary unless you wish to do so.

### 3.3 Zotero "Items"

In Zotero, an item is simply a kind of entry in your library. It may be an article pdf, a book chapter pdf, or even a web address. In your library (the left panell), you will see a list of all of the items you have saved in Zotero. The entry you see is just the info... to read the item, click on the drop-down arrow at the left of the item and it will display the pdf – double click this to open it in the PDF Reader. This is an important distinction – clicking the entry itself will display the related Metadata (see below), or information about the item. Clicking the pdf from the drop down will not show that metadata.

### 3.4 Metadata

**Metadata** is the term for the information about the item you are adding, for example a journal article has information associated with it which we need to create a reference – info such as the title of the paper, the author(s) name(s), the date it was published and the journal name. The good news is that when you add a new item, Zotero automatically searches for the metadata on the web. It is available roughly 90% of the time for articles published in the last 20 years or so. The rest of the time, it will have some, but not all, of the info.

**Editing Metadata** is necessary when some, or all, of the item info is not automatically added to Zotero. Click the entry for the item in your library (see above), which displays the item's metadata in the right-side panel. Clicking inside this panel allows you to enter info or in some cases, such as item type, to select from a drop-down menu.

! This is the most important step of adding an item to your Zotero library. When you ask it to create a citation or reference page for you, it will pull the necessary info from this panel. If this info is absent or incorrect, the citation will also be incorrect!

Using the APA references handout(s), identify the correct type of item that you have (most often this is a journal article). Now, look to see what info is included in a citation for that item type – make sure that the corresponding fields in the metadata in Zotero are filled out and accurate!

💡 Here is another helpful resource for identifying what is needed for APA 7 [APA Manual - 7th edition examples](#)

### 3.5 Creating Citations

To create individual citations, simply right click on the item's entry in your library, select "Create Bibliography from Items...", choose APA 7th edition, and copy to clipboard. You can now paste it into Word (or anywhere else). [See this guide for more details](#)

💡 Starting with Zotero 8, the Word/LibreOffice plugin uses a new unified citation dialog. You can search for items by title, creator, or year in **List mode**, or browse specific collections in **Library mode**. The old "red bar" and "classic" dialogs have been replaced by this single, more flexible interface.

Again, using the Word plugin is infinitely more efficient, you can find those instructions here: [https://www.zotero.org/support/word\\_processor\\_plugin\\_usage](https://www.zotero.org/support/word_processor_plugin_usage)

### 3.6 Creating Items Manually

We can't always find that PDF of an article we are looking for, sometimes it's behind a paywall or it simply doesn't exist on the web. Maybe you want to cite an encyclopedia, but can't get the PDF of the whole thing, or even the entry... no problem. What we want to do here, is still be able to use Zotero to create the citation for us, so we will manually add an item to our library. In this case, the item won't actually contain the PDF, but this will allow us to add the metadata by hand so that Zotero can create the citation.

i Use [this guide](#) featured below to create the item. And then, refer to the metadata sections above to add the relevant info.

## **Part II**

# **Lab 1: APA Citations & Zotero Worksheet**

## **Part 1: Familiarize yourself with Zotero (Walk-through)**

*This interactive worksheet is available in the online version of this guide.*

## **Part 2: More practice with Zotero (Take-home)**

*This interactive worksheet is available in the online version of this guide.*