Zotero for Law

User Guide

UTS Library
University of Technology Sydney
Zotero for Law

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Guide Description

Zotero is a free database tool that can be used as an alternative to Zotero. It automatically senses content in your web browser, allowing you to add it to your personal library with a single click.

In this user guide, users will learn how to use Zotero for organisation and storage, as well as citation.

This guide is split into 3 sections:

- Downloading and setting up Zotero
- Inserting References into Zotero Library
- Inserting References from Zotero into Microsoft word using AGLC

Read this guide from the beginning for step-by-step instructions, otherwise you can select a heading from the Table of Contents if you are searching for a specific item.

Please ask a Librarian, or specifically any member of the UTS Library referencing team if you need any assistance beyond this guide.

Additional Resources

- Zotero Download Link
- Zotero QuickStart Guide
- The University of Melbourne Library – Introduction to Zotero
- Harvard Library - Zotero Guide
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## Downloading and setting up Zotero

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<th>Topic</th>
<th>Steps involved</th>
</tr>
</thead>
</table>
| **What is Zotero?** | Zotero is a reference management application designed to collect, store, share, manage and cite references. There are a couple of unique things about Zotero:  
  - It automatically senses content in your web browser, allowing you to add it to your personal library with a single click.  
  - By creating a Zotero online account you can then sync your Zotero library to the cloud and between computers. |
| **Install Zotero application and the plugin for Microsoft Word** | Download the latest version of Zotero application from [https://www.zotero.org/download/](https://www.zotero.org/download/)  
When you download Zotero application, it essentially downloads two things:  
  - The Zotero Standalone Desktop application, and  
  - The Zotero Plugin for Microsoft word  
We have created detailed instructions on how to Download Zotero:  
  - Zotero for Law – Installation Guide – Mac  
| **Install Zotero Browser Connector for Chrome** | You should also install the Zotero Connector for Chrome, Firefox or Safari from [https://www.zotero.org/download/](https://www.zotero.org/download/)  
In this case, we will be using Google Chrome.  
After installing the browser connector, the Zotero button will appear in your browser. |
| **Add AGLC to Zotero as your preferred referencing style** | Zotero has a style repository of over 9000 citation styles. Australian Guide to Legal Citation (AGLC) is our preferred referencing style for Law., and you will need to add AGLC to your Zotero Style list.  
- Quit Microsoft Word (if it is currently open)  
- Launch Zotero application  
- From the top menu bar, click Zotero > Preferences (in PC Edit > Preferences)  
- Click on Cite > Styles.  
- In Style Manager, Command (⌘) + Click each of the referencing style you are not going to use.  
- Then click the Minus (-) button to get rid of them. |
- Click OK to confirm
- Now, click on Get Additional Style

- In the Zotero Style Repository, search for AGLC. Then click on the Australian Guide to Legal Citation link.
- AGLC will now be added to your Style Manager as the preferred referencing style. You may also want to tick the box next to Include URLs of paper articles in references.

<table>
<thead>
<tr>
<th>Set up ‘Data Syncing’ option for your Zotero Library</th>
</tr>
</thead>
<tbody>
<tr>
<td>Using Zotero’s sync functionality, you can access your library from any computer. Zotero syncing has two parts: data syncing and file syncing. It is important to understand their differences</td>
</tr>
<tr>
<td>- Data syncing – only syncs your references, not the PDF attachments</td>
</tr>
<tr>
<td>- File syncing – also syncs PDFs. 300 MB storage free. Above that you have to pay a Yearly subscription fee</td>
</tr>
</tbody>
</table>

If you don’t want to pay this fee, just setup Data syncing, and don’t worry about File syncing.

Create a Zotero online account
The first step to data syncing your Zotero library is to create a Zotero account.

- Launch Zotero application
- From the top menu bar, click Zotero > Preferences (in PC Edit > Preferences)
- Click on Sync.
- Then Click on Create Account (if you don’t have a Zotero account yet)
- Complete the registration form
- Zotero will send you a welcome email. You need to confirm your email address by clicking on the link in that email.
- Now go back to Zotero Preferences Panel.
- Click on Sync.
- Log in using your new Zotero username and password
- Turn ON Data Syncing, but turn OFF File Syncing (unless you want to pay the yearly subscription fee for storage).
You have successfully set up data Syncing for your Zotero Library. This means your library will now sync across multiple devices.
<table>
<thead>
<tr>
<th>Customising Zotero Display</th>
</tr>
</thead>
<tbody>
<tr>
<td>There are very few display-customisation options in Zotero interface. The only thing you can do is to add or remove columns by clicking: ![button image] - this button is located on the top right-hand-side of the Zotero interface, and it will only appear once you have at least one reference in your Zotero Library.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>How Zotero builds citation</th>
</tr>
</thead>
<tbody>
<tr>
<td>In order to build a citation, Zotero’s browser connector looks for key bibliographic information about the resource it is inspecting.</td>
</tr>
</tbody>
</table>

**Zotero is not perfect!**

Not all databases and websites work well with Zotero. Always double check the citations imported by Zotero don’t have any mistakes in the title, author’s names etc.

- In some cases, you will notice that Zotero has managed to capture *all* bibliographic data about a citation flawlessly, and you don’t need to do anything.
- In other cases, you will notice that Zotero has imported *some* required data for an accurate citation, but not all. You will then have to **manually edit** the data to make sure the citation is displaying correctly.
- Sometimes the metadata has errors, this is particularly true with **AustLII**. Again, in cases like these, you will need to **manually edit** them yourself in Zotero.
- Occasionally, Zotero fails to bring *any* data in whatsoever. In cases like these, you will have to add the entire citation into Zotero Library manually. For example, UN Documents, Treaties, Yearbooks do not work well. Simply choose the closest resource type and add the citation in manually.

We will see a few examples of these shortly.
<table>
<thead>
<tr>
<th>Topic</th>
<th>Steps involved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create References Manually</td>
<td>Let's first look at how to create a reference manually in Zotero, because you might need to do that from time to time.</td>
</tr>
<tr>
<td></td>
<td>1. Open Zotero</td>
</tr>
<tr>
<td></td>
<td>2. Click on the New Item icon</td>
</tr>
<tr>
<td></td>
<td>3. Select the type of resource. Note: Bills &amp; Statutes are hidden under New Item &gt; More.</td>
</tr>
<tr>
<td></td>
<td>4. Once you select a resource type, you will be given appropriate fields to fill out. You will need to fill out the <strong>minimum information</strong> that you need for your citation style.</td>
</tr>
<tr>
<td></td>
<td><img src="image.png" alt="Image" /></td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong></td>
</tr>
<tr>
<td></td>
<td>1. When entering manual citations, you only need to fill in the fields used in the citation and you can leave the rest blank.</td>
</tr>
<tr>
<td>Tips for Cases</td>
<td></td>
</tr>
<tr>
<td></td>
<td>For a <strong>reported case with round brackets</strong>, use the Reporter, Reporter Volume, and First Page fields. The Year goes into the Date Decided field <strong>without</strong> brackets.</td>
</tr>
<tr>
<td></td>
<td>For a <strong>reported case with square brackets</strong>, if the citation includes a volume number, add the volume number <strong>before</strong> the reporter abbreviation in the Reporter field (eg. 2 KB); and leave the Reporter Volume field empty. The Year goes into the Date Decided field <strong>without</strong> brackets.</td>
</tr>
<tr>
<td></td>
<td>For a <strong>medium neutral citation</strong>, the judgment number goes into the Docket Number field. Put the <strong>year in square brackets</strong> <strong>before</strong> the Court abbreviation, eg. [2000] HCA and leave the Date Decided field empty.</td>
</tr>
<tr>
<td>Tips for Legislation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>For <strong>Statutes</strong>, the <strong>Code field</strong> is for the jurisdiction abbreviation: eg Cth (no brackets are required).</td>
</tr>
<tr>
<td></td>
<td>For <strong>Bills</strong>, enter the Bill title with the year and jurisdiction into the <strong>Title</strong> field. All other fields can be left empty.</td>
</tr>
</tbody>
</table>
Detecting References Automatically

Zotero's browser connector will try to detect references on a webpage. You can use the browser connector to add material to your Zotero library. Zotero desktop application must be open on your computer in order for this to work.

The appearance of the browser connector will change depending on what Zotero can detect on the page.

- When **no details** are detected, it will display the grey 'Z' icon.
- When a **web article/web page** is detected, it will display a blue 'document' icon.
- When a particular book is detected, it will display a book icon (for example in Google Books).
- When a journal article is detected, a printed page will display.
- When **multiple items** are detected, it will display a **folder** icon (for example in Google Scholar search results):
  - When saving from a page with multiple references, and check box will pop up asking you to select which references you want to save.

**Note:** If you right-click on any of the above icons, Zotero browser connector will give you the Save to Zotero option:

Importing References from a Webpage

To import references from a webpage to your Zotero library, click on the browser connector icon. By default, it will save the item into the collection folder you are currently in within Zotero, but you can choose another collection from a dropdown that will appear.
Where available, the full text of the article will also be saved in your library attached to the record.

⚠️ Note:
Always double check the citations imported by Zotero! It will make mistakes.
The basic rule of thumb for importing references from a database is:

- **Select** the records you want to import
- Select the **Export** option in your database
- Choose **Endnote/RefMan/RIS/Zotero** (depending on the database) as the export option
- Click **Export**

This method works well with GoogleScholar and HeinOnline.

**Google Scholar**
To download references directly from Google Scholar

- Click the **Cite** button which appears underneath the article
- Choose **RefMan**

The reference will be added to your Zotero Library.

**HeinOnline**
If the full-text is available in HeinOnline, Zotero will recognise it as a **journal article**.

- **Right-click** on Zotero Connector in your browser
- Choose **Save to Zotero (HeinOnline)**
If the full-text is **not** available in HeinOnline, Zotero will recognise it as a **webpage**.

![Zotero Connector](image)

You will need to manually edit this entry in Zotero Library to turn it into a **Journal Article**.

**AustLII**

For the most part (but not always), Zotero recognises which database you are looking at within AustLII. The Browser Connector icon will change depending on the type of content being detected by Zotero:

<table>
<thead>
<tr>
<th>Content Type</th>
<th>Icon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cases</td>
<td>![Law Scale Icon]</td>
</tr>
<tr>
<td>Legislation</td>
<td>![Government Building Icon]</td>
</tr>
<tr>
<td>Journal Articles</td>
<td>![Document Icon]</td>
</tr>
</tbody>
</table>

However, there are some issues:

You will need to manually change the item type from Web Page to a Case, or a Bill or a Statute. These steps will ensure short titles for your references will work.

- **Legislation**
  1. Check the 'item type' is set to Statute.
  2. Find the jurisdiction in the 'extra' field, then move the jurisdiction to the 'code' field.
  3. Find the year in the Name of Act field, then move the year to ‘date enacted’.

- **Reported cases**
  1. Check the 'item type' is set to Case.
  2. Check the following fields are populated, if not move the correct information into these fields:
     - case name;
Medium neutral cases

1. Check the ‘item type’ is set to Case.
2. Check the following fields are populated, if not move the correct information into these fields:
   - case name;
   - court (manually change this to the abbreviated version);
   - date decided (can be Year Month Day; Year Month; or Year – only the year will appear);
   - docket (contains the judgement number – this will automatically place the year in square brackets);
   - reporter (use abbreviated Law Report Series title);
   - reporter volume (year will automatically appear in round brackets when there is a volume number, square if this information is missing);
   - first page.

Issues with Lexis and Westlaw

Zotero is not automatically compatible with Lexis or Westlaw.

This means that when you are viewing an item like a case, or a statute on Lexis or Westlaw, Zotero will simply treat it as a ‘Web Page’.

You will need to manually change the item type from Web Page to a Case, or a Bill or a Statute.

This problem happens with AustLII as we have seen earlier.

Workaround

In these situations, you can -

- Search for the same resource in HeinOnline, Google Scholar or another supported database and import the citation from there, or
- Enter the reference manually into Zotero (discussed earlier), or
- Try extracting citation data from the PDF and add/edit the missing or misplaced information (discussed next, but it doesn’t always work)
Extracting citation data from PDF documents

If you have PDF documents saved on your computer, you can drag and drop the file into the center panel of Zotero.

The program will then try to detect the publication details from any metadata in the file, create a record and link the file to the record.

**Note:** Not every file will have the required metadata for Zotero to detect. Some files will work, others won’t. Some files will give incomplete or incorrect data.

Always check and edit the bibliographic information that has been added from the PDF.

Adding references by identifier

You can quickly add references to your Zotero library if you already know their ISBN or Digital Object Identifier (DOI)

To add a reference via one of these identifiers, click the **Add Item by Identifier** button at the top, type or paste in the identifier and press **Enter**

Adding full text articles to existing references

- Launch Zotero application
- From the top menu bar, click **Zotero > Preferences**
- Click **Advanced**
- Under **OpenURL Resolver** field enter: http://sfx.lib.uts.edu.au/sfx_local
You can now select any reference in Zotero and click the **locate** button and select: **Library Lookup**

This will take you to the EZproxy link and you will be able to access the full text through UTS Library's database subscriptions.

**UTS:LIBRARY**

**Title:** The legal position of Tibet  
**Source:** American Journal of International Law [0002-93]

- [Full text available via] HeinOnline Law Journal Library  
- [Full text available via] JSTOR

To add attachments already stored elsewhere in the computer:

- **Right click** on an existing citation
- **Click** Add Attachment > Attach Stored Copy of File
Rather than attaching a copy of a stored file, you can also attach link to an *existing file* in the local hard drive, or a link to URI (for web location).

You can create **collections** and **subcollections** in Zotero to organise your materials.

- To create a new collection, right-click within your Library panel and select **New collection**. Name the collection in the pop-up box.

You can also create **subcollections within collections**, or sub folders.

- To add subcollection within an **existing collection**, right click on the folder and select **New Subcollection** and give it a name.

- **Add items** to collections and subcollections by **dragging** and **dropping** them into the folder.

You can remove items from folders by **right clicking** and selecting **Remove Item from Collection**. This will not delete the item from your library.
You can **rename** collections or subfolders at any time by right clicking on a folder and selecting **Rename Collection**.

### Adding Tags

**Adding tags to classify references**

Zotero tries to tag items when it brings references in, but not always.

You can always add custom tags to items in your library. Tags can be useful because they can help quickly retrieve related items. You can use tags for assigning **keywords**, or actions to carry out, for example *to read*.

To view, add and remove tags, **select an item** in your library and click on the **Tags tab**. (Items downloaded from a database or catalogue may come with tags already attached).

![Tagging in Zotero](image)

You can add your own tags or delete existing tags.

**Display Items by Tags**

Your tag cloud is displayed in the panel below your Collection folders at the **bottom left-hand-side** of the Zotero interface. This panel will only display the tags **within that collection**.

![Tag cloud in Zotero](image)

Clicking on a tag will display all items tagged with that term. You can choose more than one tag to show items with that combination of tags.

You can colour code your tags, this will add a coloured square to the item in the middle panel.

You can also search for tags using the search box.

### Adding Notes to items

The **Notes** field allows you to add personal notes for your records. Each item may have multiple separate notes.

To add a note, **select an item** and click the **Notes tab** on the right-hand panel. Click the **Add** button.
You can edit the note within this panel, or in a new window. Notes fields allow text formatting, highlighting and hyperlinking.

**Search Zotero Library and its Collections**

You can search your entire Zotero Library and its collections by clicking on the Search icon located at the top of the Zotero interface. You can also search for notes and tags you have added to your references.
# Inserting References from Zotero into Microsoft Word using AGLC

<table>
<thead>
<tr>
<th>Topic</th>
<th>Steps involved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word Plugin</td>
<td>When you installed the Zotero application, you have also installed the Zotero plugin for Microsoft Word. This plugin allows you to insert references directly from Zotero Library into your Microsoft Word document.</td>
</tr>
</tbody>
</table>

- **Add/Edit Citation** - Adds a new citation or edit an existing citation in your document at the cursor location.
- **Add/Edit Bibliography** - Inserts a bibliography at the cursor location or edits an existing bibliography.
- **Document Preferences** - Opens the Document Preferences window, e.g. to change the citation style.
- **Refresh** - Refreshes all citations and the bibliography, updates any item metadata that has changed in your Zotero library.

**Unlink Citations** - Removes Zotero field codes from the document. Removing field codes changes your references in to plain text and prevents any further automatic updates of the citations and bibliographies. **This is irreversible.**

Removing field codes should only be done when you are ready to finish and/or submit your thesis. You should save a back-up copy of your document in case you do need to make changes.

Don’t click Unlink Citations unless you are absolutely sure what you are doing!

<table>
<thead>
<tr>
<th>Adding Citations in Microsoft Word</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Adding Citations in Microsoft Word</strong></td>
<td></td>
</tr>
<tr>
<td>• Open Microsoft Word</td>
<td></td>
</tr>
<tr>
<td>• Click on Zotero tabsh</td>
<td></td>
</tr>
<tr>
<td>• Click Add/edit Citation</td>
<td></td>
</tr>
</tbody>
</table>

**Option 1: Quick View**

Enter your terms (author, words from the title) in the search bar, the references that match will be displayed. Click to select.
Adding Multiple Citations in Quick View
- To add multiple citations in Quick View, enter the first citation
- Enter the words from the next citation (i.e., author name, words from the title)
- Repeat until you have added all required citations
- Hit enter to insert them into your document.

Option 2: Classic View
- Click on that little drop-down button next to Z.
- Switch to Classic View

The Classic View displays your entire library.
- Select the desired reference and click OK to insert it into your document.

Adding Multiple Citations in Classic View
- To add multiple citations in Classic View, click on Multiple Sources
- Select the first source, then press the green arrow
- Select the second source, then press the green arrow
- Repeat until you have added all required citations
- Press OK to insert them into your document.

Handy Tips
If you prefer Classic View (like we do!), you can train Zotero to use it as the default option when you trying to insert references into Word. To do that:
- From the top menu bar, click Zotero > Preferences (in PC Edit > Preferences)
- Click Cite
• Click **Word Processors**
• Tick that box next to **Use classic Add Citation dialog**

![Zotero Preferences Window]

**Previewing a Citation in AGLC Style**

To preview a particular citation in AGLC style:

- Highlight the reference in Zotero
- From the top menu bar, click **Zotero > Preferences** (in PC **Edit > Preferences**)
- Click on **Cite > Styles**
- Click **Style Preview** (a new window will pop-up)
- Click **Refresh**

You can now preview the selected citation in AGLC style:

![Zotero Style Preview]

**Australian Guide to Legal Citation**

Tieh-Tseung Li, 'The Legal Position of Tibet' (1956) 50(2) *American Journal of International Law* 394.

**Editing a Citation**

- In Microsoft Word, click on **Add/Edit Citations**
- Choose **Classic View**
- Locate the citation you want to edit.
- Add page numbers, pinpoints, and other text, or remove the citation.

  To do this there is no need to change the drop down menu from 'pages'. You can type whatever you would like displayed as a pinpoint, e.g. a page number, s then provision number, etc. There is no need to include punctuation as Zotero will automatically include it (exception of the square brackets around a paragraph number).

- Choose to display a short title for repeated references.

  To achieve this, select the ‘Suppress Author’ option when inserting the citation.
Once you have finished your work, you can generate a bibliography. To do that:

- In Microsoft Word, position your cursor in the location where you want your bibliography to appear.
- Click on **Add/Edit Bibliography**

The bibliography tool will show your citations in the correct AGLC order (splitting A Articles/B Cases/C Other etc in alphabetical order) but it lacks headings.

You must add the headings yourself manually. We recommend doing this after you have finished working on your document, as headings are prone to disappearing if the coding for the bibliography is disturbed.

**Quick bibliography**

You can quickly generate a bibliography in word by highlighting a selection of items in your Zotero library and then, **right-click**, choose **Create Bibliography from Items**...

- Choose your **Citation Style**
- **Output Method**: Copy to Clipboard
- **Click OK**
You will now be able to paste these references into a blank Word document and generate a quick bibliography.

**Edit bibliography**
- In Microsoft Word, click on Add/Edit Bibliography

All sources cited in your document will be listed.

To add additional sources to your bibliography,
**Click anywhere within your bibliography**, click the Add/Edit Bibliography button.

Select the references to be added and click the green arrow to add more sources to the right-hand column. These will be added to your bibliography.

### Syncing

Access and use the same Zotero Library from multiple computers using Zotero Syncing feature.
- Go to: [https://www.zotero.org/user/login/](https://www.zotero.org/user/login/)
- Log in using your Zotero credentials
- Click on My Library. You will now be able to see your entire Zotero library online.

You can click on a reference, see its detailed metadata, abstract and links to attachments.
- You can edit items and those changes will sync back to your local Zotero Library.

### Sharing using Groups

**Creating and joining Zotero Groups**
With Zotero groups, you can:
- Share your own work or sources you have discovered with others who are working in related areas.
- Collaborate with colleagues, publicly or privately, on ongoing research.
- Discover other people with similar interests and the sources they are citing.

**Creating a new Zotero Group and inviting members**
- To create a new group, go to the top menu bar of Zotero, then click New Library > New Group
Create a New Group

Search for Groups - Create a New Group

Group Name
Choose a name for your group

Group URL: https://www.zotero.org/groups/

Group Type

- Public, Open Membership
  Anyone can view your group online and join the group instantly.
  - Choose a Public, Open Membership

- Public, Closed Membership
  Anyone can view your group online, but members must apply or be invited.
  - Choose Public, Closed Membership

- Private Membership
  Only members can view your group online and must be invited to join.
  - Choose Private Membership

Create Group

- Give your new group a name and choose the most appropriate option for Group Type. You can then invite other existing Zotero users to your group.

Joining an existing Zotero group

- Go to https://www.zotero.org/search/type/group
- Search for groups using a keyword
  - Find a group and join.
Syncing is **NOT** a good substitute for backing up: the Zotero servers only store the most recent version of your synced library! Imagine if you have accidentally deleted a bunch of references from your local library, those references will be deleted from your synced library as well!

This is why we strongly recommend that you frequently back up your Zotero library in an external storage device (eg. a USB Flash Drive).

To do that:

- Go to Zotero **Preferences**
- Click **Advanced**
- Click **Files and Folders**
- Click **Show Data Directory** (this is the folder you need to copy for your back-up, but don’t copy it just yet!)

- Quit Zotero application
- Now **copy** that entire Zotero folder into a USB flash drive. Give it today’s date. This is your backup.

**Backup your Zotero Library on a regular basis!**
| Wrap-up | For further guidance see the following resources:  
|         |   ▪ Zotero Download Link  
|         |   ▪ Zotero QuickStart Guide  
|         |   ▪ The University of Melbourne – Introduction to Zotero  
|         |   ▪ Harvard Library - Zotero Guide  
|         | For complex queries please visit the ‘Ask a Librarian’ page: https://www.lib.uts.edu.au/help.  
|         | You may also get in touch with a librarian supporting the Faculty of Law, or a librarian from the Referencing team. |