With Zotero’s Word plug-in (separate install required), you can insert citations in your manuscript, referencing sources in your Zotero library, and automatically updating your references/bibliography.

**Step 1: Install the Word Plug-in**

Go to Zotero’s website to find the download for the Word plugin. Install as prompted. http://www.zotero.org/support/word_processor_plugin_installation_for_zotero_2.1

**Step 2: Inside Word**

**Plugin Toolbar**

Installing a Zotero word processor plugin adds a Zotero toolbar to your word processor (in Word 2008 for Mac the script menu is used).

The icons are (from left to right):

- **Zotero Insert Citation**
  Insert a new citation in your document at the cursor location.

- **Zotero Edit Citation**
  Edit an existing citation. You have to place the cursor inside the relevant citation before pressing this icon.

- **Zotero Insert Bibliography**
  Insert a bibliography at the cursor location.

- **Zotero Edit Bibliography**
  Edit an existing bibliography.

- **Zotero Refresh**
  Refresh all citations and the bibliography, updating any item metadata that has changed in your Zotero library.

- **Zotero Set Doc Prefs**
  Open the Document Preferences window, e.g. to change the citation style.

- **Zotero Remove Codes**
  Remove Zotero field codes from the document. When Zotero inserts a citation or bibliography, it does so by using a field code. This field code allows Zotero to later recognize and automatically update the citation or bibliography (e.g., in numeric styles, citations have often to be renumbered when additional items are cited). Removing the Zotero field codes prevents any further automatic updates of the citations and bibliographies.
  Note that removing field codes is **irreversible**, and should usually only be done in a near-final copy of your document.
Inserting and Editing Citations

Using a Zotero word processor plugin usually starts with clicking “Zotero Insert Citation” to open the Quick Format Citation dialog, which allows you to cite items from your Zotero library. When you click this button for the first time in a new document, the “Document Preferences” window opens first.

Document Preferences

The “Document Preferences” window lets you set the following document-specific preferences:

- The citation style.
- If you have selected a note-based style (like “Chicago Manual of Style (Note with Bibliography)”), you can choose whether citations are inserted in footnotes or endnotes. Note that the word processor, and not Zotero, controls the style and format of footnotes and endnotes.
- The way citations and bibliographies are stored in the document. In Word you can choose between “Field” and “Bookmarks”.

Note: You can open Zotero in Firefox to update existing style or install additional ones. Inside the Zotero pane in Firefox, click the Gear icon to select Preferences. Then, choose the “Cite” tab, then “Styles.” Select “Get Additional Styles” to select from the thousands of styles available. Click the style you want to update or add, and choose INSTALL.
Quick Reference
Cite while you Write: Zotero

Quick Format Citation Dialog
The Quick Format Citation dialog is used to select items from your Zotero library, and create a citation.

Start typing part of a title, the last names of one or more authors, and/or a year in the dialog box. Matching items will instantly appear below the dialog box.

Select an item by clicking on it or by pressing return when it is highlighted. The item will appear in the dialog box in a shaded field. Press return again to insert the citation and close the Quick Format Citation dialog.

Customizing Citations
Citation can be customized in various ways. To start, click the shaded citation in the Quick Format box to open the cite options window.

Page and Other Locators
In some cases you want to cite a certain part of an item, e.g. a certain page, page range or volume. This additional cite-specific information (e.g. “pp. 4-7” in the cite “Doe et al. 2001, p. 4-7”) is called the “locator”.

The cite options windows has a drop-down list of the different locator types (“Page” is the default) and a text box in which you can enter the locator value (e.g. “4-7”).

Prefix and Suffix
The “Prefix” and “Suffix” text boxes allow you to specify text to respectively precede and follow the automatically generated cite. E.g. instead of “Tribe 1999”, you might want “cf. Tribe 1999, see also ...”.

Any text in the prefix and suffix fields can be formatted with the HTML tags <i> (for italics), <b> (bold), and <sup> (superscript). E.g., writing “<i>Cf</i>” the classic example” will be displayed as “Cf. the classic example”.

Suppress Authors: Using Authors in the Text
With author-date styles, authors are often moved into the text and omitted from the following parentheses-enclosed citation, e.g.: “…according to Smith (1776) the division of labor is crucial...”. To omit the authors from the cite, check the “Suppress Author” box (this will result in a cite like “(1776)” instead of “(Smith, 1776)”), and write the author's name (“Smith”) as part of the regular text in your document.
Citations with Multiple Cited Items

To create a citation containing multiple citations (e.g., “[2,4-6]” for numeric styles or “(Smith 1776, Schumpeter 1962)” for author-date styles), add them one after the other in the Quick Format Citation dialog. After selecting the first item, don't press return, but type the author, title, or year of the next one. Some citation styles require that items within one in-text citation are ordered either alphabetically (e.g., “(Doe 2000, Grey 1994, Smith 2008)”) or chronologically (“(Grey 1994, Doe 2000, Smith 2008)”). To disable automatic sorting of the cites in the citation, click the small arrow on the left of the Quick Format bar and uncheck the “Keep Sources Sorted” option.

Switching to the "Classic View"

You can switch to the “Classic View” citation dialog by clicking the little arrow on the left of the Quick Format box, and selecting “Classic View”. To permanently switch to the classic view check the “Use classic Add Citation view” checkbox in the "Cite" tab of the Zotero preferences in Zotero for Firefox or Zotero Standalone.

Inserting and Editing the Bibliography

Clicking the “Zotero Insert Bibliography” button ( ) inserts a bibliography at the cursor location. By default, the bibliography is filled with all the items you have cited in the document.

Clicking the “Zotero Edit Bibliography” button ( ) opens the “Edit Bibliography” window, where you can add additional items to the bibliography that you haven't cited, or remove cited items from the bibliography. You can revert these edits using the “Revert All” button.