Working in Groups with Zotero

Using Zotero is an excellent way to collaborate when doing a group project. Understanding the roles members have in a Zotero group is important for this collaboration. Members can be the owner, administrator(s) and/or group member(s).

**Group Owner:**
Only one member of the group is the owner. The owner initially creates the group and it is the owner’s online account that will need to have adequate storage space. The owner is also an administrator and can designate other members to be administrators.

**Group Administrator(s):**
The owner and any member who has been given administrator “rights” is an administrator and can:
- Invite members
- Change roles of members (e.g. give other members administrative capabilities)
- Remove members
- Change file sharing and editing options of group members

**Group Member(s):**
Although a group can be designated as *public*, where anyone can ask to become a member, most research groups are *private* since they usually don’t want a public presence. Private groups require members to be invited by someone with administrator rights.

To become a member of a group you will need to:
- Have a free online Zotero account.
- Be invited and then accept the invitation to be a member of the group

To collaborate as a group member you:
- Add citations in group folder(s)/collection(s) by dragging and dropping citations to the group folder from your “My Library” or by opening the group folder before adding citations so they are added into the group folder when collected.
- Edit citations in the group folder(s)/collection(s)
- Create new subcollections/subfolders. (right-clicking on a group library and selecting “New Subcollection”)
- Frequently manually sync or set your preferences to automatically sync to your online account so your citations and edits are shared with other members of your group.

**Note:** Zotero works like iTunes and a copy is always put in your “My Library” even when you save to another folder. When an item is put in a personal folder you are actually creating a pointer, not making a copy. However, group folders are different and are separate from My Library. Any items dragged or saved into them are separate copies. Changes
made in a group item will not be reflected in your own copy of the item until you drag it back into your “My Library” or personal folder.

Change of ownership:
If for some reason the owner must leave the group he/she can transfer ownership of the group to another individual/account. Before this is done the new owner should make sure they have adequate space in their account.