

# Getting Started with Zotero

A University of Michigan Library Instructional Technology Workshop

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<b>Overview</b> .....	<b>2</b>
Limitations and Future Plans for Zotero.....	2
Installation.....	2
Configuring MGet It.....	2
<b>Getting Started in Zotero</b> .....	<b>3</b>
The Zotero Layout.....	3
<b>Transporting Your Zotero Library</b> .....	<b>4</b>
Changing the Location of Your Library .....	4
Exporting to Other Citation Programs.....	4
<b>Adding Citations your Zotero Library</b> .....	<b>5</b>
Creating Citations Manually.....	5
Creating Citations from Webpages.....	5
Importing Citations from Databases and Catalogs .....	6
Importing from a Saved Zotero Library or other Citation Program.....	6
<b>Searching for Citations</b> .....	<b>7</b>
Quick Search.....	7
Searching with Tags .....	7
Advanced Search.....	7
<b>Organizing your Library with Collections</b> .....	<b>8</b>
Creating a New Collection.....	8
Adding Citations to a Collection.....	8
Renaming Collections.....	8
Deleting Citations.....	8
<b>Enhancing Your Citations</b> .....	<b>9</b>
Editing Citations.....	9
Adding Attachments .....	9
Working with Tags.....	9
Adding Relationships.....	9
Creating Notes.....	10
<b>Creating a Bibliography</b> .....	<b>10</b>
<b>Using Zotero with Word</b> .....	<b>11</b>
Adding Citations.....	11
Editing Citations.....	11
Generating a Bibliography .....	11
Editing a Bibliography.....	12
Updating References and Preferences.....	12
<b>Using a Timeline</b> .....	<b>13</b>

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## OVERVIEW

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Zotero is a free bibliographic management extension that works with Firefox. It recognizes websites and records in library catalogs and databases and is able to extract the bibliographic information associated with these sources. In addition to its bibliographic capabilities, Zotero has several features that enable you to supplement your citation library including automatic capture of webpages, storage of files, images and links, as well as note taking and search abilities. Because Zotero works in your browser, it captures information as you do your research. The advantage of this is twofold:

- You can pull bibliographic information from multiple databases and import them into Endnote or Refworks in one step, without downloading text files and using import filters.
- You can capture bibliographic information about many non-traditional sources such as webpages, wikis, and blogs.

If you are already using software to help manage you citations, you may want to use Zotero in conjunction with other programs like Endnote or RefWorks.

## LIMITATIONS AND FUTURE PLANS FOR ZOTERO

Because Zotero is a relatively new tool, it does not support some library catalogs and databases such as ISI Web of Science. By default, Zotero saves your library to the local machine – to transport your Zotero library, please see the [Transporting Your Zotero Library](#) section on page 4 below. Its compatibility with Microsoft Word is somewhat limited.

Zotero developers are addressing these issues, and its functionality is constantly being updated and improved. Version 1.0 includes highlighting and annotation capabilities as well as an advanced search. Beyond this, developers plan to add more translators, citation styles, import/export formats, web access to your Zotero library, and better integration with MS Word. For the latest information on Zotero's features and limitations, visit [http://www.zotero.org/documentation/known\\_issues\\_and\\_planned\\_features](http://www.zotero.org/documentation/known_issues_and_planned_features).

## INSTALLATION

Firefox 2.0 is required for Zotero – you can download the latest version of Firefox from <http://www.mozilla.com/en-US/firefox/>.


If you have FireFox 2.0 or higher, download the Zotero extension.



1. Go to <http://www.zotero.org> and click on the red *Download* graphic.
2. A dialog box will appear asking you if you would like to install your download. Click on *Install Now*.

## CONFIGURING MGET IT

You can configure Zotero to use MGet It, which allows you to find full-text of citations at UM.

1. Click on the Actions icon (  ) menu and select **Preferences**.
2. In the *Resolver* field under *Open URL*, enter the following link [http://p9003-sfx.lib.umich.edu.proxy.lib.umich.edu/sfx\\_local](http://p9003-sfx.lib.umich.edu.proxy.lib.umich.edu/sfx_local)

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## GETTING STARTED IN ZOTERO

You can start Zotero in four ways:

- Go to the **Tools** menu and choose **Zotero**.
- Click on the *Zotero* logo in the bottom right corner of your browser. 
- Click on the Zotero icon in your browser's toolbar. 
- Press *Ctrl + Alt + z* if you are using a PC, or *Shift + Apple + z* on a Mac.

To close Zotero, click on the Close window icon () in the top right corner of the Zotero window, or repeat any of the four steps you used to open the Zotero window.

## THE ZOTERO LAYOUT

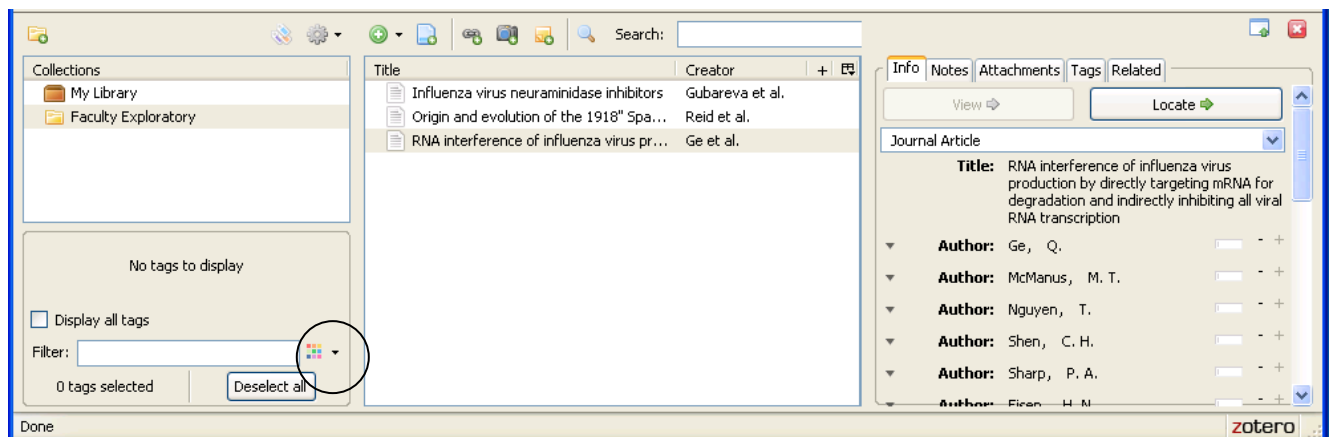
To resize the Zotero window, click on the top edge of the window and dragging the edge to reposition the boundaries wherever you like. The Zotero window has three panels that represent different levels of specificity for your references.

- The **Left Panel** shows your Zotero libraries and collections, as well as “tags” (keywords). The tags button is circled in the picture below.
- The **Middle Panel** displays items contained within the library that you select in the **Left Panel**.
- The **Right Panel** displays information about the item that you select in the **Middle Panel**.

Left Panel

Middle Panel

Right Panel



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## TRANSPORTING YOUR ZOTERO LIBRARY

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By default, your Zotero library is stored in Firefox **on your computer**. You can change the location of the library to a portable drive (or your IFS space) or export the library.


## CHANGING THE LOCATION OF YOUR LIBRARY

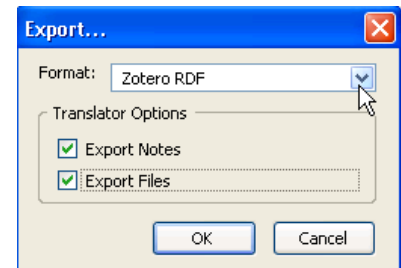
If you move around to several computers, you could change the location of your Zotero library on whichever machine you are at and access the same Zotero library. You would have to set this location on each computer.

1. Quit Firefox, copy your Zotero library, and paste it in the new location (you could also drag it to a portable drive and that will make a copy). The Zotero folder is in your Firefox profile directory – see the Zotero FAQ to find the exact location ([http://www.zotero.org/documentation/using\\_portable\\_firefox\\_on\\_a\\_usb\\_drive](http://www.zotero.org/documentation/using_portable_firefox_on_a_usb_drive)).
2. Click on the Actions icon (  ) menu and select **Preferences**.
3. Click on the *Advanced* tab.
4. Click on the *Custom* radio button under *Storage Location*.
5. A Select Zotero Data Directory window will appear. Once you select a directory for your library, Zotero will restart Firefox. All of your Zotero data will now be saved in the new directory.

## EXPORTING TO OTHER CITATION PROGRAMS

To use your citations in Zotero on another computer or in a program such as EndNote,

1. Click on the Actions icon (  ) menu and select **Export**.
2. A dialog box will appear prompting you to choose the format of your exported document. Click on the *Format* pulldown list to select a format.
3. If you plan to export your library into Zotero on another computer, choose **Zotero RDF**. If you would like to export your library to another citation program such as Endnote or RefWorks, choose **RIS**.
4. Click OK to save the file. You can now import the file into another citation program or into Zotero on a different computer (see the [Importing from a Saved Zotero Library or other Citation Program](#) section on page [6](#)).



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## ADDING CITATIONS YOUR ZOTERO LIBRARY

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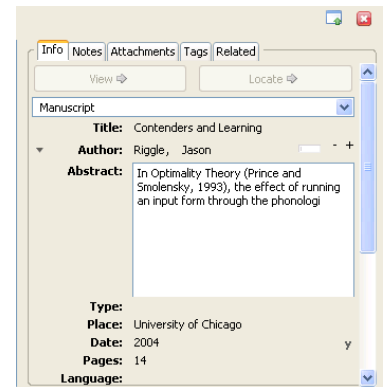
You can add citations to your library in four ways: manually enter citation information, automatically cite webpages, import citation information for a single item, or import citation information for multiple items.

**Note:** If you use EndNote, you need to change the default settings in Zotero so that you are not prevented from using Direct Export to EndNote features. To do so, click on the **Actions** icon (⚙️) in the **Left Panel** and choose **Preferences**. Uncheck the box that says *Use Zotero for downloading RIS/Refer files*.

## CREATING CITATIONS MANUALLY

To create a citation manually in your Zotero library,

1. Go to the **Middle Panel** and click on the **New Item** icon (➕) menu.
2. A pulldown menu will appear. Select the type of source you would like to cite. For more citations types, click on **More** and a full list of options will appear.
3. In the **Right Panel** you will see fields specific to the type of source you selected. Fill them in with the information for your item.



## CREATING CITATIONS FROM WEBPAGES

To import citations for webpages into your library,

1. In the **Middle Panel**, click on the **Create New Item from the Current Page** icon (📄➕). Information about the current webpage will automatically be pulled into your library.
2. Edit the information by clicking on each field in the **Right Panel**.

Zotero automatically saves the items that you import. This information, however, is saved only in your browser on your computer. When you cite a webpage, Zotero only pulls in the information available on the page – so if the author is not listed, you have to enter the name(s) manually.

You can also add a link or take a picture of your current page that will be entered in your library as a citation.

- Click on the **Save Link to Current Page** icon (🔗➕) in the **Middle Panel** to cite a link.
- Click on the **Take Snapshot of Current Page** icon (📷➕) in the **Middle Panel** to save a picture.

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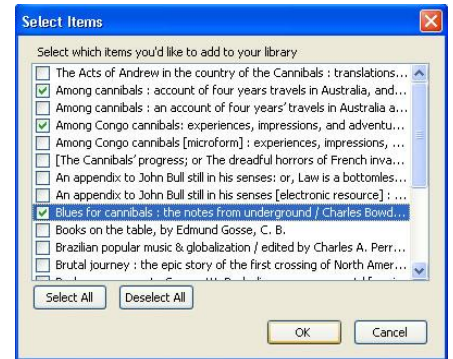
## IMPORTING CITATIONS FROM DATABASES AND CATALOGS

Zotero is compatible with many databases and library catalogs, including Mirlyn, Cambridge Scientific Abstracts, EBSCOhost, InfoTrac, JSTOR, LexisNexis, OCLC FirstSearch, ProQuest, and PubMed. A full list of systems that Zotero supports can be found at the following URL: <http://www.zotero.org/translators/>.

Once you have your search results, you can import multiple citations at the same time or choose just one individual citation.


If you are on a page with a list of results, a **Folder** icon (  ) will appear in your address bar. If you are looking at an individual record, a **Book** icon (  ) or **Article** icon (  ) will appear instead. Click on the displayed icon.

- If it is an individual record, it will immediately be added to your library.
- If it is a result list, a box will appear with a list of all of the records so you can check the items you would like to import. Click *OK* and your items will appear in your library.



## IMPORTING FROM A SAVED ZOTERO LIBRARY OR OTHER CITATION PROGRAM

To import from a saved Zotero library or another citation program,

1. Export your citations from the other program and save as a RIS file. If you're in Zotero, save it as a Zotero RDF (as described in the [Exporting to Other Citation Programs](#) section on page 4).
2. Open your Zotero window.
3. Click on the **Actions** icon (  ) menu and select **Import**. A dialog box will appear.
4. Locate your saved document and click on *Open*.
5. Your selected library (or file) will appear in the **Left Panel** in a separate folder.

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## SEARCHING FOR CITATIONS

Once you have citations in your Zotero library, you need to be able to find specific records. There are two different kinds of searches: quick search and advanced search.

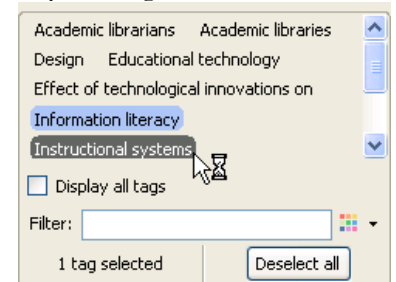
### QUICK SEARCH

1. Click on the collection you would like to search in the **Left Panel**.
2. Type your search term into the *Search* field in the **Middle Panel**. The field will search as you type.
3. Results for your search will appear in the **Middle Panel**. These results will only be from the collection you selected in Step 1.

### SEARCHING WITH TAGS

You can use the tags associated with the different items to find them. These can be the tags that you have created, or ones that were downloaded with the record from a library catalog or database.

1. Make sure all the tags are showing by clicking the Actions button (⚙️) in the **Left Panel** and choose *Show Automatic*. All the tags from selected collection are now displayed.
2. Click on a tag, and you will only see items that have that tag. You can further narrow your search by clicking on additional tags.

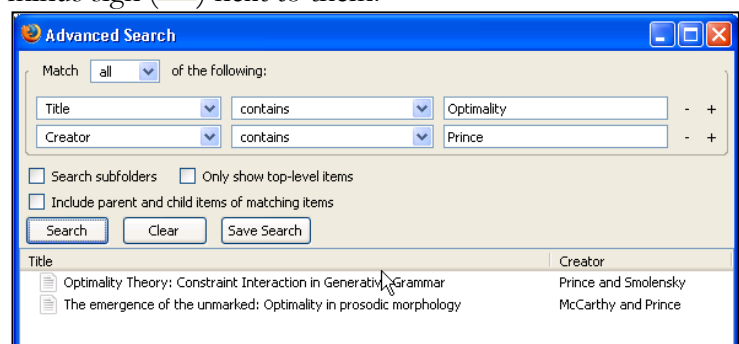


### ADVANCED SEARCH

You can also do an advanced search in a collection if you want your search to be more specific.

1. Click on the collection you would like to search in the **Left Panel**.
2. Click on the Advanced Search icon (🔍) in the **Middle Panel**. A window will appear prompting your search with several different search capabilities.
3. Choose a search category the *Title* pulldown menu on the left, and type in a corresponding search term. Add the search term by clicking the plus sign (+) next to it.
4. Continue this process until you have all the terms you would like to search for. You can delete search terms by clicking the minus sign (-) next to them.
5. Click *Search*. Results for your search will appear below.

*Note:* You can save and name your search for future reference by clicking on *Save Search* and typing in a name. The search will be saved in the **Left Panel**. Any new items added to the library will be picked up automatically in these saved searches.



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## ORGANIZING YOUR LIBRARY WITH COLLECTIONS

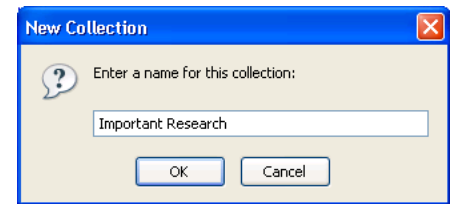
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Zotero allows you to manage how your citations are organized. You can change the locations of citations and the names of collections. Additionally, you can add tags, links, and notes to individual citations to make them easier to search and identify.

### CREATING A NEW COLLECTION

Within your Zotero library, you can create collections. Collections are foldering tools to help you categorize your citations. Your collections are shown in the **Left Panel**. To add a new collection to your Zotero library,

1. Click on the New Collection icon (  ) in the **Left Panel**.
2. A box will appear on your screen prompting you to name your new collection. Choose a name and click *OK*. Your new collection will appear in the **Left Panel** of the Zotero window.



### ADDING CITATIONS TO A COLLECTION

If you would like to copy items from your library into your new collection,

1. Click on the citations you would like to move in the **Middle Panel**.
2. Drag the citation into the new collection in the **Left Panel**. A copy will appear in the new collection. This will not remove the item from its original location in your library.

You can select multiple citations by holding down *Control* (PC) or *Command* (Mac) while you click.

### RENAMING COLLECTIONS

If you would like to rename a collection,

1. Click on the collection you would like to rename.
2. Right-click (PC) or use *Control* + Click (Mac) on the highlighted item and select **Rename Collection...**
3. A dialog box will appear on your screen prompting for a new name. Type in the new name and click *OK*.

### DELETING CITATIONS

To delete an item **from a collection**, select the item in the collection and press the *Delete* key on your keyboard. Note that this will only delete the item from the collection, and it will still be accessible in the library. If you do this from the library, you will permanently delete it.

To delete an item **from your library**, select the item and right-click on it. Choose **Delete Selected Item from Library**. This will permanently delete the item along with any notes and relationships associated with it.

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## ENHANCING YOUR CITATIONS

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### EDITING CITATIONS

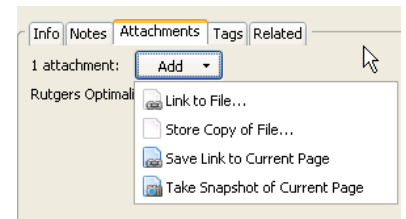
To edit information about items in your library,

1. Click on the citation you would like to change in the **Middle Panel**.
2. In the **Right Panel**, click on the field that you would like to change and type in your new information.

### ADDING ATTACHMENTS

You can attach files to individual citations in your library. This is useful when you have saved electronic versions (PDFs) of the articles that you are citing and would like to associate them with the corresponding citations. To add an attachment,

1. Select the citations to which you would like to attach your file in the **Middle Panel**.
2. Click on the *Attachments* tab in the **Right Panel**.
3. Click on the *Add* button. A set of options will appear.
4. You can either attach a file by choosing **Link to File** or by choosing **Store Copy of File**. By linking to a file, you are creating a file path to the document stored on your computer. If you choose to store a copy of the file, the entire document will be saved within Firefox.



### WORKING WITH TAGS

Individual items can be tagged to facilitate searching and organizing. Items can have more than one tag. To add your own tag to a citation,

1. Select the citation you would like to tag in the **Middle Panel**.
2. Click on the *Tags* tab in the **Right Panel**, and then click on the *Add* button.
3. Name your tag in the field that appears. Your tag will then be attached to the selected reference and will appear as part of your tag list in the **Left Panel**. If you click on the tag in the tag list, all citations with this tag will appear in the **Middle Panel**.

**Note:** Some items saved from online catalogs will come with tags. To see these tags, click the Actions button (🔍) in the **Left Panel** and choose *Show Automatic*. Now the tags (ones you've added as well as those that were already attached to the item) will display.

### ADDING RELATIONSHIPS

You can also create a link between one item and another by adding a relationship between the two items. To add a relationship,

1. Click on *Related* tab in the **Right Panel**.
2. Click on the *Add* button.
3. Select a citation to which you would like to relate the item and click *OK*.

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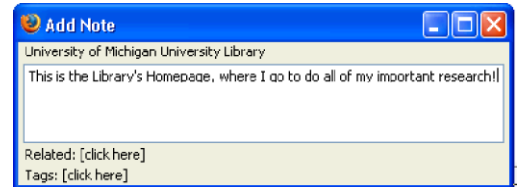
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## CREATING NOTES

To add a note to a citation,

1. Select the citation you would like to add a note to in the **Middle Panel**.
2. Click on the *Notes* tab in the **Right Panel**, then click on the *Add* button.
3. A dialog box will appear into which you can type your note. You can also add tags and related items to the citation you selected in this box by clicking on **Related** or **Tags** in the bottom of the frame.
4. For articles without a link or snapshot, you can create multiple notes. For articles with a link or a snapshot, you are only allowed to create one note.



To store a note independent of a citation in your library, click on the New Standalone Note icon (📝) in the **Middle Panel**. A box will appear in the **Right Panel** for you to enter your note. When you are finished, the note will be saved with your references and will be accessible from the **Middle Panel**. The default name is the first few lines of text in the note.

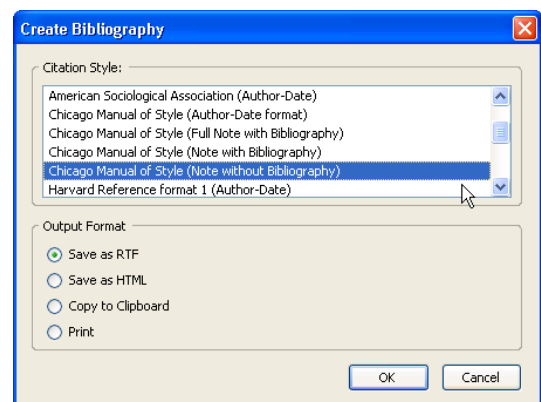
To create a note from a document or webpage that you are currently viewing,

1. Highlight the text that you would like to cite.
2. Right-click on the text to open the **Options** menu.
3. Click on **Create Zotero Item and Note from Selection**. Your text will be saved as a note for the citation of your current page.

## CREATING A BIBLIOGRAPHY

To generate a bibliography,

1. Select the items you would like to include in your bibliography in the **Middle Panel**.
2. Once the items are highlighted, right-click on the selected items.
3. Choose **Create Bibliography from Selected Items**. A new dialog box will appear.
4. Choose the citation style you would like to use for your bibliography from the pulldown list.
5. Choose the format you would like save your document in, (Rich Text Format (RTF) or HTML for a webpage). You can also choose to print the document.
6. Click *OK*.



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## USING ZOTERO WITH WORD


Zotero's plugin for Microsoft Word makes it easy to cite items from your Zotero library in Word documents. The plugin is available for both Mac OS X and Windows, and has been tested with various versions of Word. Further compatibility information and installation instructions are available online at [http://www.zotero.org/documentation/microsoft\\_word\\_integration](http://www.zotero.org/documentation/microsoft_word_integration).

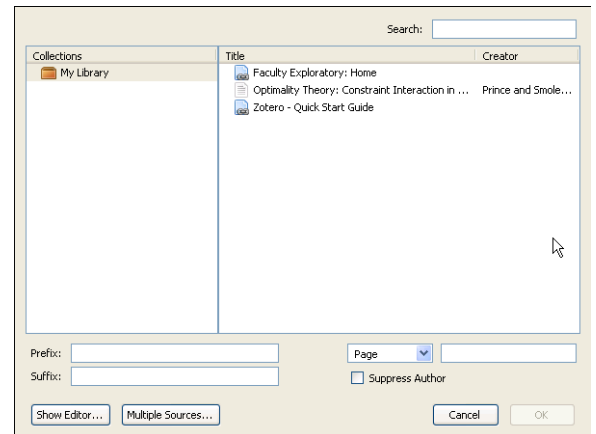
Once you have installed the plugin, a new row of icons will be in your Microsoft Word toolbar.



## ADDING CITATIONS


To add a new citation to your Word document,

1. Click the *Zotero Insert Citation* (  ) button.
2. If this is the first time you've added a citation to your current document, a Document Preferences dialog box will open. Choose the format you would like to use and click **OK**.
3. An Add Citation window will appear. Select the item you would like to cite in your document.
  - a. You can select multiple citations by clicking *Multiple Sources...* and adding sources to a list.
  - b. Add page numbers as well as prefixes and suffixes in the appropriate boxes at the bottom of the window.
4. To preview your citation, click on the *Show Editor...* button. The *Edit Citation* box will appear at the bottom of the Add Citation window.
5. Click **OK**. A properly formatting citation will now be in your document.




## EDITING CITATIONS

To edit an already existing citation in your document,

1. Click on the citation you would like to edit. Click the *Edit Citation* (  ) button.
2. The Add Citation window will appear. Edit the citation as needed then click **OK**.

## GENERATING A BIBLIOGRAPHY

To generate a bibliography from all of the items you have referenced in your document, click the *Zotero Insert Bibliography* (  ) button. A bibliography will be inserted at your current place in the document.

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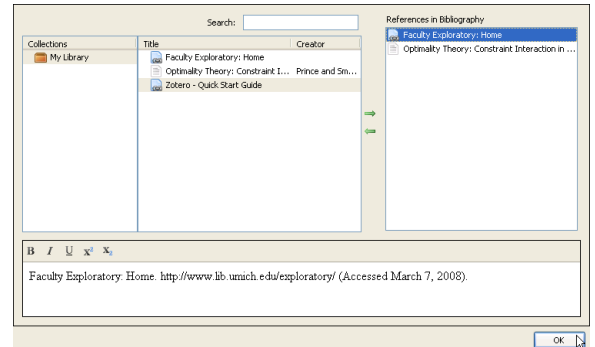
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
## EDITING A BIBLIOGRAPHY

To edit an already existing bibliography in your document,

1. Click on the *Zotero Edit Bibliography* () button. A window will appear containing your Zotero Library and the references currently in your bibliography.
2. To add a reference to your bibliography, click on the reference you would like to add and append it to the list in the **Right Panel**.
3. To edit references in your bibliography, click on the reference on the right you would like to edit. Edit it in the *Edit Citation* box below.
4. Click *OK* when you are done.



## UPDATING REFERENCES AND PREFERENCES

- If you have made any changes to your collection since inserting a citation or generating a bibliography, click the *Zotero Refresh* () button. This will update your references in your document to any changes you have made.
- To change the bibliographic style of your document, click the *Document Preferences* () button. A window will appear allowing you to change citation styles and formatting.

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**Need help?** Visit the Faculty Exploratory or Knowledge Navigation Center on the 2nd floor of the Graduate Library.

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# Getting Started with Zotero

A University of Michigan Library Instructional Technology Workshop

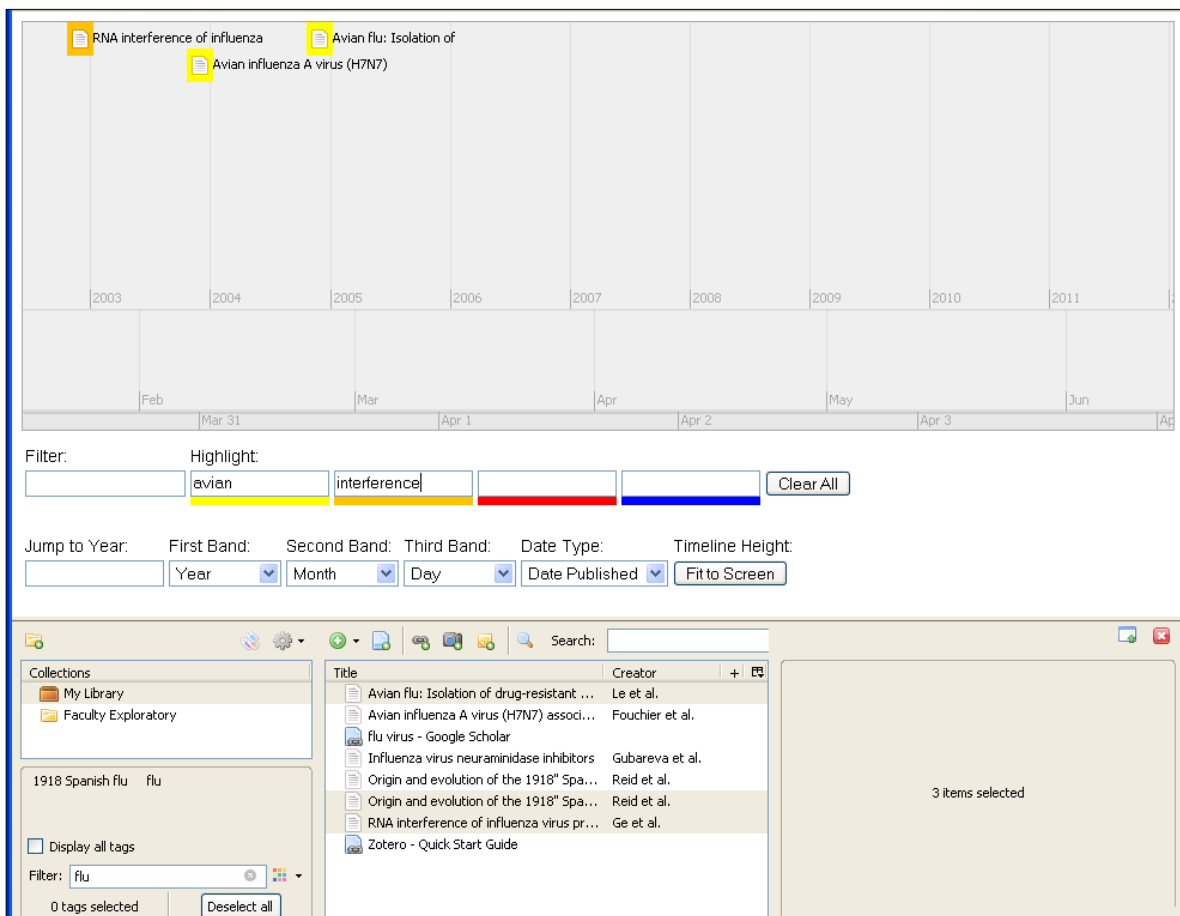
## USING A TIMELINE

Zotero's timeline function offers another way of visualizing your collections.

To create a timeline,

1. Select the items that you would like to be in your timeline.
2. Click on the Actions icon (  ) menu and select **Create Timeline**. All of the selected items will be added to a timeline on the main screen of your browser.
3. Each band represents a different historical magnification. The lighter gray areas represent the area of the timeline currently visible on the first band. You can change the displayed time bands through the pulldown menus directly above your Zotero window.
4. To view different parts of your timeline, click and hold anywhere in the gray area and drag left or right as appropriate.

Clicking on an item in your timeline will bring up the corresponding item in your collection. For more information, please visit [http://www.zotero.org/documentation/timeline\\_screencast](http://www.zotero.org/documentation/timeline_screencast).



The screenshot displays the Zotero timeline interface. The top section shows a timeline from 2003 to 2011. Three items are plotted: 'RNA interference of influenza' (yellow band), 'Avian flu: Isolation of drug-resistant ...' (yellow band), and 'Avian influenza A virus (H7N7)' (yellow band). Below the timeline are filter and highlight options. The filter field contains 'avian' and 'interference'. The highlight field contains 'avian', 'interference', and 'inference'. Below the filter and highlight fields are options for 'Jump to Year', 'First Band', 'Second Band', 'Third Band', 'Date Type', and 'Timeline Height'. The bottom pane shows a list of items with columns for 'Title' and 'Creator'. The list includes 'Avian flu: Isolation of drug-resistant ...', 'Avian influenza A virus (H7N7) associ...', 'flu virus - Google Scholar', 'Influenza virus neuraminidase inhibitors', 'Origin and evolution of the 1918" Spa...', 'Origin and evolution of the 1918" Spa...', 'RNA interference of influenza virus pr...', and 'Zotero - Quick Start Guide'. The '3 items selected' indicator is visible on the right side of the list.

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