zotero

Goodbye 3x5 cards, hello Zotero.
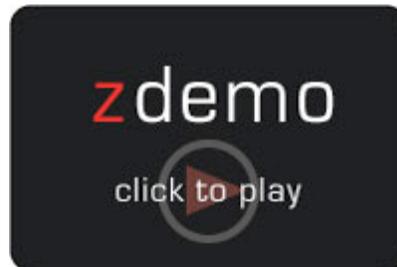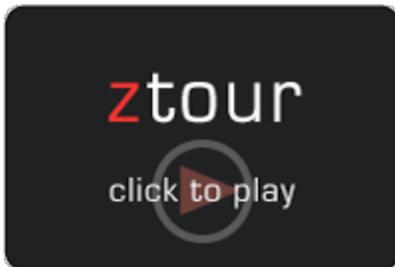Login or Register

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Download a PDF version [http://www.zotero.org/download/promote/quick_start_guide.pdf] of this guide (1.2MB)

Introductory Screencasts

The best way to get started with Zotero is to watch our Tour and Demo. Click the images below to start. For more screencasts take a look at our screencast tutorials.

The Zotero Pane

Zotero runs in your Firefox web browser, which must be open in order for you to access your research collection. You do not have to be online, however to use Zotero; features such as notes, search, organization will work perfectly well offline, although obviously you will not be able to view some online items in your collection or to acquire other online materials.

The Zotero pane contains your entire collection: bibliographic references and whole documents and files, your notes, and other items like images and snapshots of web pages.

Click the Zotero icon in the bottom right corner of your browser window to open your Zotero window.

This brings up a pane with all of your citations, collections, and notes.

You can close Zotero by clicking on the X icon in the upper right of the Zotero pane or by clicking on the logo again. You can open or close the Zotero pane at any time from within Firefox. The Zotero pane does not have to be open for you to do "quick saves" of material you want to add to your research collection.

When Zotero Senses Items on a Web Page

Perhaps the most important feature of Zotero is its ability to sense when you are looking at an item (or items) on a web page. For instance, if you are looking at the record for a book on an online library catalog, Zotero's book icon will appear in Firefox's location bar (at the top of the browser window, where the current web address, or URL, appears), like so:
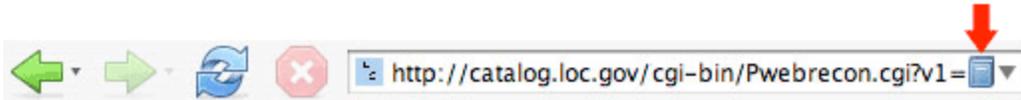
Simply click on the book icon and Zotero will save all of the citation information about that book into your library. (The Zotero pane does not have to be open for this to work.) If you are looking at a group of items (e.g., a list of search results from Google Scholar or LexisNexis), a folder will appear. Clicking on the folder will produce a list of items with check boxes next to them; choose the ones you want to save and Zotero will do the rest.


If you are currently working in a specific collection (that is, a collection is highlighted in the left column rather than "My Library"), the references will be copied to that location as well as your overall library.

Zotero senses information through *site translators.* Zotero's translators should work with most library catalogs, some popular websites such as Amazon and the New York Times, and many gated databases. Just look for icons in the location bar. (For more information or for some sites to try out, see our Compatible Sites list.) The Zotero team will be adding support for additional sites over time. You need not check back here for these extra translators; they will be automatically added to your Zotero installation every so often.

The Three Columns of the Zotero Pane
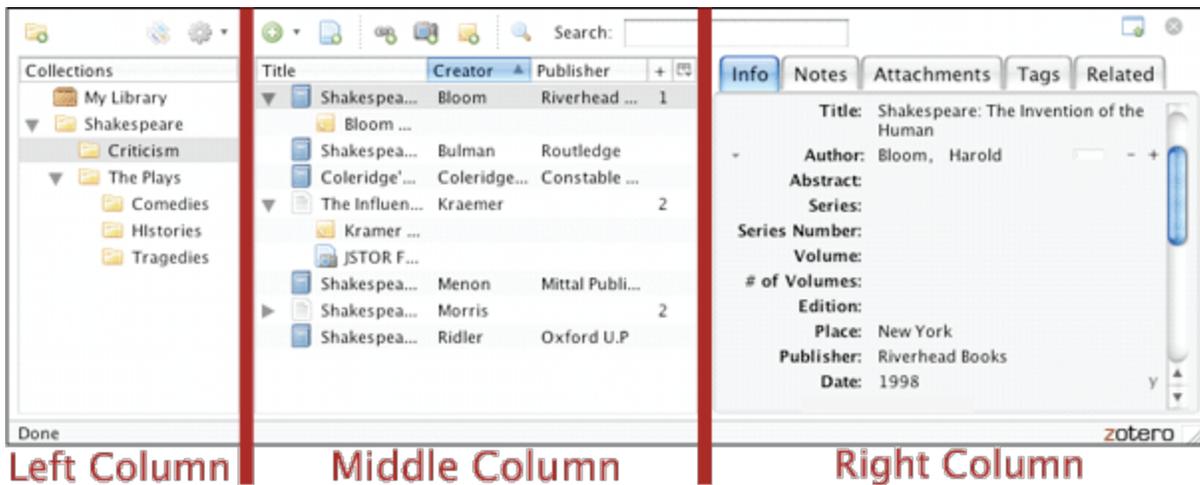
The left column contains your full library ("My Library") and your individual collections, which are subsets of "My Library"; the middle column shows the items in the collection that is highlighted in the left column; the right column shows information about the item that is selected in the middle column.

"My Library" holds all references, files, and notes you have saved, uploaded, downloaded, or written. To place these items into a specific collection, drag and drop them into the folder icon for that collection. Any collection can have an unlimited number of subcollections or folders. You can also create saved searches that display all items that match criteria you define. To delete an item or collection, just highlight it and press the "delete" key. Right-clicking (or control-clicking on a Mac) on items and collections brings up a menu of other actions you can take.
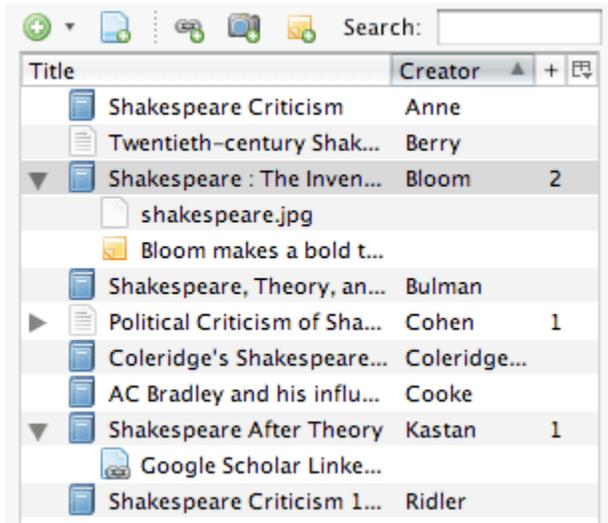
Left Column
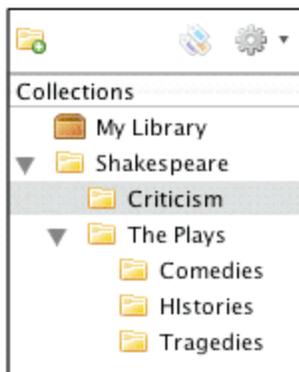
add a new collection

manage your tags

import/export collections, change Zotero preferences, and view information about Zotero (including version and credits)

your Zotero library, which holds every item you have added

📁   a collection (a subset of your library)

Middle Column

📗   manually add an item

📄   add this web page to your collection

🔗   add a link to this web page (this is like a bookmark, unlike adding the web page as a full item

using 📄, which can accept full citation information, multiple notes, and attachments)

📷   take a snapshot of the current web page (snapshots can be dragged and dropped into any
folder or item)

🔍   perform advanced searches

📝   add a stand-alone note

🗒   note

📘   book

📄   journal article

🏷   newspaper article

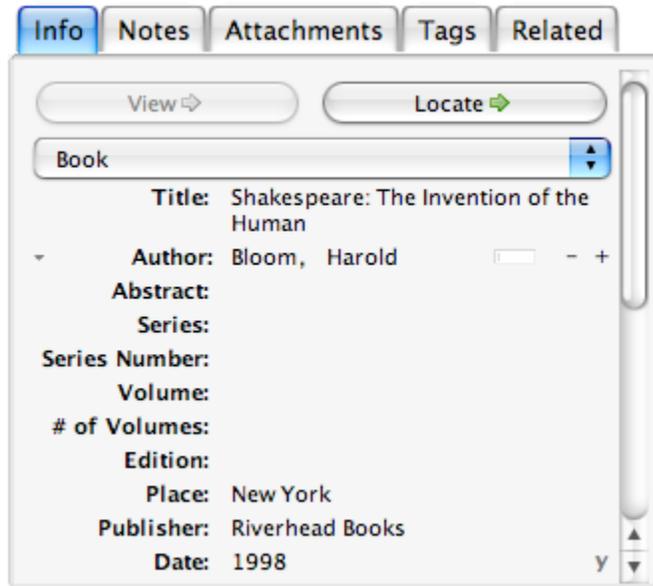🎞   film

📄   file

📎   link to a file

📎   link to a web page
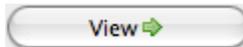
📷   snapshot of a web page

these are just the most popular item types; other icons, for artwork, audio, etc. will appear if they are added to your library

Right Column

toggle in and out of full screen mode

close the Zotero pane

View → takes you to the web address associated with the item (if there is one)

Locate → attempts to find an article or book in your local library (using OpenURL)

Info citation information, which you can edit by clicking on individual fields

Notes notes you've taken on the item (notes are automatically saved as you type)

Attachments files, PDFs, images, links, and snapshots of web pages you've attached to the item

Tags tags you've given the item; Zotero may also automatically grab LC subject headings (for books) and keywords for articles

**Related** other items you've related to this item

zotero open and close the Zotero pane

Note-taking

Most users don't just like to read and gather sources; they like to take notes on them. We've all got little scribbles in the margins of books, on post-its, and on notepads (real and virtual). Zotero makes it easy to keep all those annotations, jots, and notes all in one place, and all searchable. Click the screenshot below to watch a screencast about notes or read below.
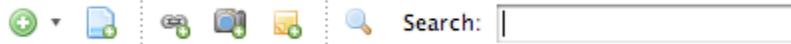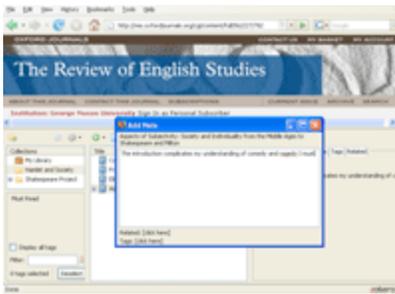
Five icons appear at the top of the middle column in the Zotero column. The yellow square with a plus sign at far right is the "standalone note" icon. Click this button to create a new note and then type your note.
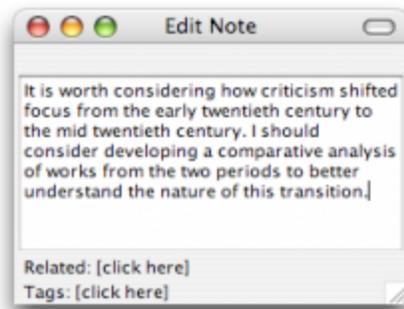

You can also take notes about individual items. To take a note about an individual item select the item and click the notes tab in the right column. Now you can click the "add" button to add notes.
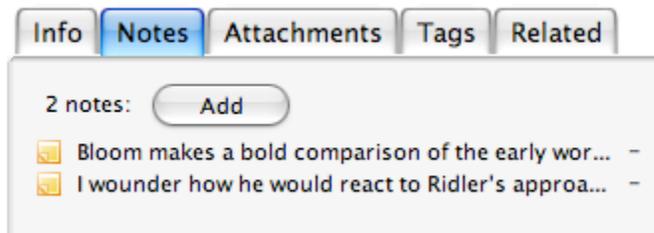

Tags and the Tag Selector Box

Tagging is an easy way to categorize items by attaching descriptive words to them. You can tag your information with whatever relevant keyword or term you would like associated with that given item. These tags allow you to sift through your information in a personal way, by the categories that you deem relevant. Consider watching our screencast on Tags and the Tag Selector Box.

Tags	Tag Selector Box
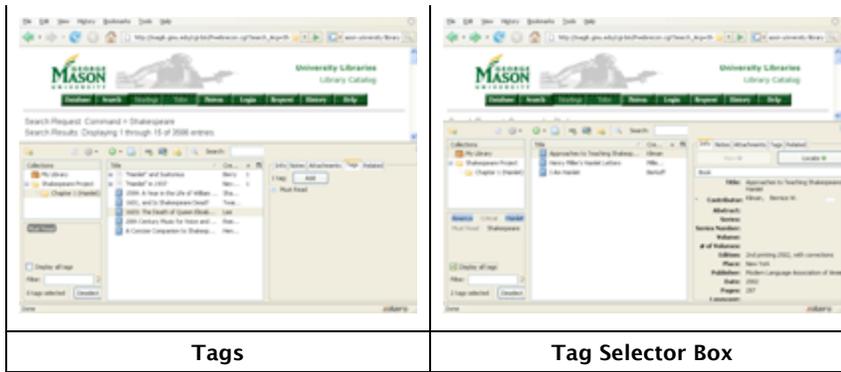
To add a tag to an item simply select the tags tab [Tags] in the right column and hit the [Add] button. Then type your tag. Once you have added the tag you will see it has also been added to the tag selector box in the left column.

Located in the bottom-left-hand corner of the Zotero pane, the tag selector adds an additional layer of information management to complement the collection and search systems. You can toggle the tag selector in and out of view by clicking the the show/hide tag selector button ( ).The tag selector updates its inventory from tags you place on individual items in your Library. By clicking on any of the tags, you can filter the items within your Library, collections and saved searches by as many or as few tags as you like.

The tag selector defaults to showing all the tags on items in the current folder. When you click on a given tag, the center column updates to display only the items with that tag. You can select multiple tags to further focus the results in the center column or click on a tag again to deselect it. To quickly find a tag in the list, type part of its name in the Filter box; selected tags not matching what you type remain selected, allowing you to quickly find and select multiple items. It is also possible to click the "Deselect all" button to return the center column to displaying all the items in the selected folder.
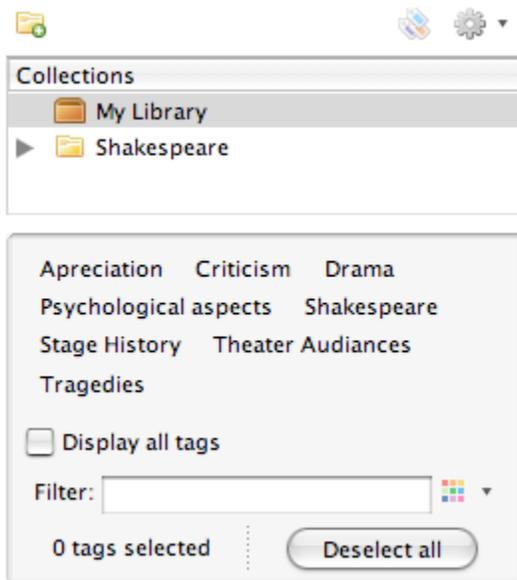
From this box you can also control the tags globally. By right-clicking on a tag (or Control-clicking on the Mac) you can choose to rename a tag across all items or delete it from all of the records it is attached to. You can also assign tags to multiple items at once by dragging items from the center column onto tags in the tag selector. This is where the "Display all tags" checkbox comes in handy: while the tag selector normally only shows you tags on items in the current view, clicking "Display all tags" causes tags not assigned to currently visible items to appear in gray. You can then drag items onto one of the gray tags to assign it to those items.

Note that some items that you save will come with tags already attached. If Zotero detects classification information or other metadata as part of a catalog record, it will, in some cases, extract that information as a tag. For example, OPAC (Online Public Access Catalog) record subject headings become Zotero tags. You can manage these automatic tags in the same way that you manage the tags you add manually.

Exporting Items From Your Collection

There are several ways to export items from your collection. Zotero can generate formatted bibliographies as rich text files, HTML files, or directly into Microsoft Word and Open Office through our MS Word and Open Office plugins. You can also drag and drop any of your items into any text field to generate fully formatted references. Using this method it is easy to export from Zotero to web tools like Google Docs. Zotero also allows you to export your collection to other bibliographic tools like Endnote or Refworks.
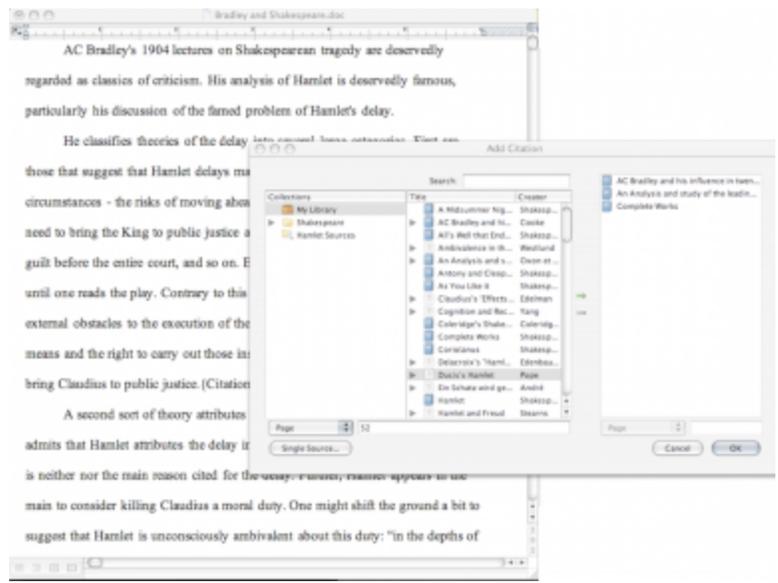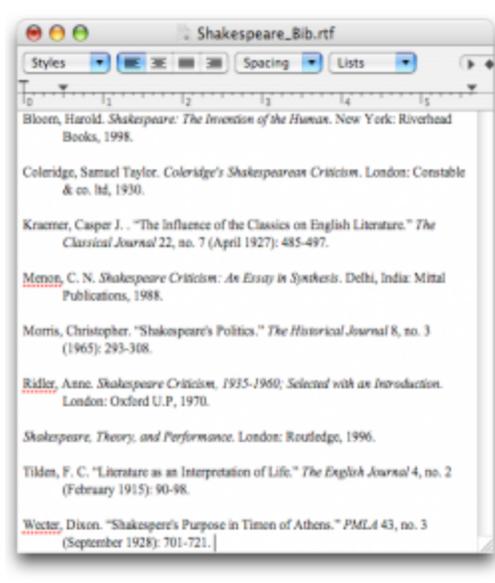
| Automatically add references in MS Word | Automatically generate formatted bibliographies |

Archive the Web

As you have already seen Zotero is a powerful tool for capturing and managing bibliographic information. But that's not all. Zotero is also a great tool for archiving and annotating entire web pages. Click the screenshots below to watch screencasts on archiving and annotating the web.

Archiving the Web	Highlighting and Annotation
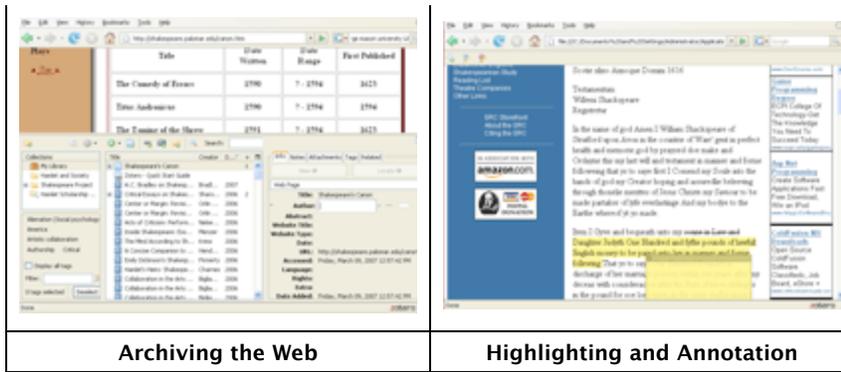
To archive a web page select the "Create New Item From Current Page" icon ( ). This will archive a copy of the page in your library. To see the page as it was on the day you captured it double click the snapshot icon( ) associated with the file.

You will also notice the annotation bar in the left hand corner of your screen.
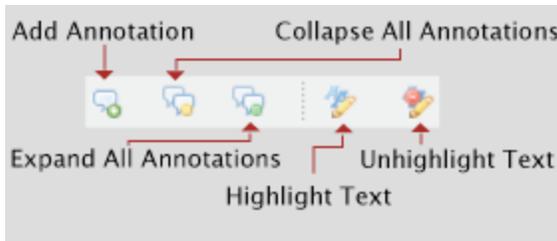
Click the highlight icon to turn your cursor into a highlighter, then click and drag to highlight text. If you decide to undo your highlighting, you can click the un-highlight icon and select text to remove the highlighting.
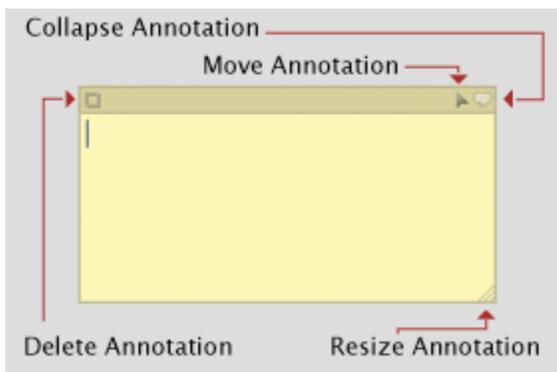
To add sticky notes, click the add annotation icon. Now wherever you click on the page you will add a sticky note. You can hide the annotation by clicking on the collapse annotation speech bubble in the top right corner of the note. To resize the note, click the bottom right corner and drag. If you would like to delete a sticky, click the delete annotation box in the upper left corner of the note. To toggle all your annotations in and out of view, click the show and hide annotation buttons on the

annotation toolbar.

Going Further

Now that you have a handle of the basics in Zotero you are ready to tackle any research project. You can learn more about Zotero from our <u>documentation page</u> and our <u>screencast tutorials</u>. If you still have questions take a look at our <u>frequently asked questions</u> page and if that doesn't answer your question search the Zotero forums [http://forums.zotero.org/categories/]. For up-to-the-minute news about Zotero, subscribe to the <u>Zotero blog</u>.

Quick Start Guides in Other Languages

- <u>Dutch – Nederlands</u>
- <u>French – Français</u>
- <u>German – Deutsch</u>
- <u>Hungarian – Magyar Nyelv</u>
- <u>Japanese – 日本語</u>
- <u>Korean – 한국어</u>
- <u>Polish – Polski</u>
-     Russian – Русский
- <u>Slovenian – Slovenščina</u>
- <u>Spanish – Español</u>

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