

Zotero Documentation

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Chapter 1. Zotero

Zotero is a free tool to help you collect, organize and share research.

Zotero is a free multi-platform software that helps you collect research easily from different sources. It automatically recognizes articles from sources like JSTOR and can add them to custom libraries with a single click. You can organize your libraries by sorting them into collections and tagging them with keywords. Zotero also makes it easy to collaborate by sharing libraries with other users and providing options for synchronizing your data. Zotero can integrate into your browser or word processor for a seamless user experience.

Chapter 2. A Unified Zotero Experience

Zotero has been consolidated into a single software that is compatible with all browsers via the Zotero Connector plugin.

Since Zotero 5.0, Zotero for Firefox and Zotero Standalone have been replaced by a single version of Zotero that is compatible with all browsers. Mozilla has discontinued its extension framework, on which Zotero for Firefox was based, instead opting for the WebExtensions framework. This limits how much the extension can modify the browser experience, but allows the Zotero team to create a more unified experience available across multiple browsers. This means you will need to be running Zotero in the background when using the [Zotero Connector \(on page 3\)](#) plugin to save articles being viewed in your browser.

Chapter 3. Zotero Connector

Zotero Connector is a browser plugin that integrates Zotero into your web browser and helps you save content to your Zotero library.

Zotero Connector is a browser plugin available for Firefox, Chrome, Safari and Edge. Zotero Connector can automatically sense content as you are viewing it and offers an easy way to download and save it to your Zotero library with a single click. The main Zotero software must be running in the background for this to work.

Chapter 4. Installing Zotero on Windows

Zotero works seamlessly with Windows. The following steps will show you how to download and configure Zotero.

1. Go to the [Zotero Downloads page](#).
2. Click the **Download button** to save and run the executable file.

The installation wizard will appear and guide you through the rest of the installation process.

Chapter 5. Installing Zotero on Mac

Zotero works seamlessly with Mac. The following steps will show you how to download and configure Zotero.

1. Go to the [Zotero Downloads page](#).
2. Click the **Download button** to save the .dmg file.
3. Drag the .dmg file into your Applications folder.

You can then run Zotero from the Applications folder and pin it to your dock.

Chapter 6. Installing Zotero on Linux

Zotero is available for various Linux distributions. The following steps will show you how to download and configure Zotero.

1. Go to the [Zotero Downloads page](#).
2. Click the **Download button** to save the .tar.bz2 file.
3. Extract the .tar.bz2 archive to a folder of your choice and run the zotero file to start Zotero.

Chapter 7. Installing Zotero on Chromebook

Zotero isn't available for Chrome OS but can be used in its Linux version on a Chromebook running Linux.

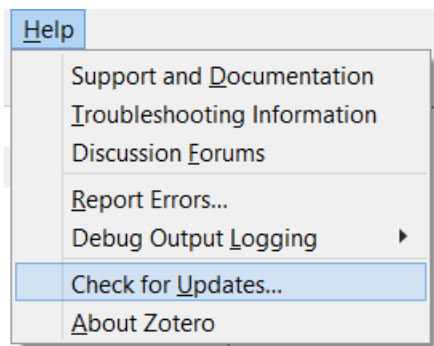
You must already have Linux installed and running on your Chromebook. After that, simply follow the same steps as installing Zotero on Linux.

1. Go to the [Zotero Downloads page](#).
2. Click the **Download button** to save the .tar.bz2 file.
3. Extract the .tar.bz2 archive to a folder of your choice and run the zotero file to start Zotero.

Chapter 8. Check for updates

You can check for and download updates for Zotero within the software itself.

1. Click the **Help** button in the menu bar.
2. Click the **Check for Updates...** option



Chapter 9. Setting up an online account

Zotero can be used without an account but creating an online account will allow you to sync and access your library from anywhere. You will also be able to join groups and backup your attached files. Creating a Zotero account is free.

Register for an account by visiting the [Zotero website](#).

Chapter 10. Data Syncing

Data Syncing merges the Zotero content on your local computer with the content on the Zotero servers.

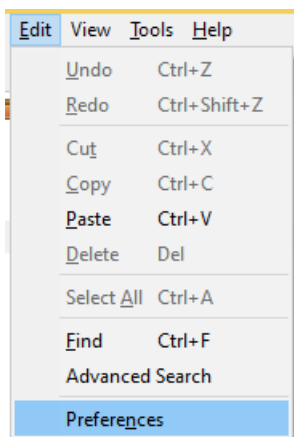
Data syncing allows you to keep your library items, notes, links and tags (but not file attachments) consistent across multiple devices. With data syncing, you can pick up on work that you started on a different computer and view your library online without needing to have Zotero installed.

Setting up automatic sync

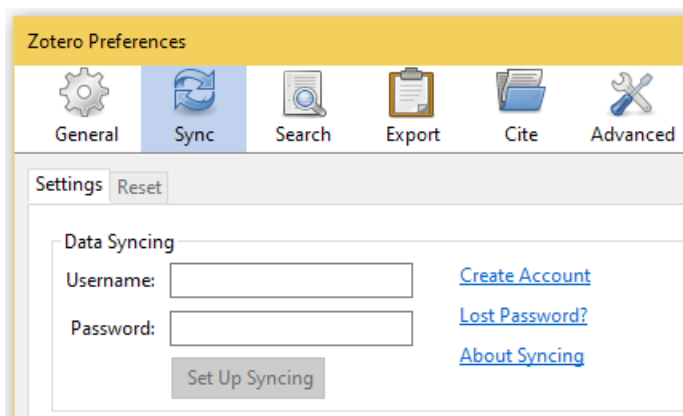
Data syncing allows you to pick up where you left off on a different computer.

You need a [Zotero account \(on page 9\)](#) before activating data syncing.

1. Click **Edit** in the Zotero menu bar and open the **Preferences**.



2. Click on the **Sync** pane and enter your Zotero account data.



3. Click **Set Up Syncing** to turn on automatic data syncing.

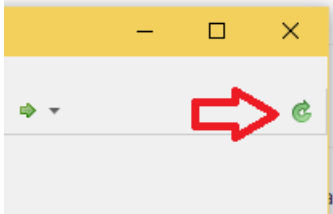
Automatic data syncing will only sync data like item entries in your library. To also sync file attachments, you will need to activate [file syncing \(on page 12\)](#) separately.

Manually syncing Zotero

Data syncing allows you to pick up where you left off on a different computer.

You need a [Zotero account \(on page 9\)](#) before using data syncing.

Click the **refresh** button on the right of your Zotero toolbar.



Data syncing will only sync data like item entries in your library. To also sync file attachments, you will need to activate [file syncing \(on page 12\)](#) separately.

Chapter 11. File Syncing

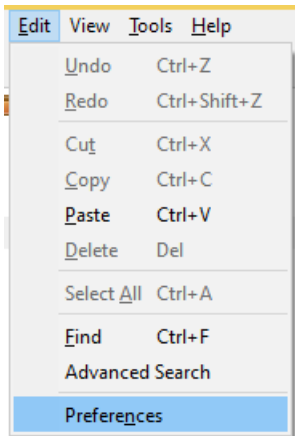
File attachments aren't synced with data syncing.

Zotero treats file syncing and data syncing separately. Files include attachments like PDFs, images, videos and audio files. To sync files, you need to set up file syncing alongside data syncing using either Zotero File Storage or WebDAV. You can also use linked files and alternate solutions like cloud storage to sync files.

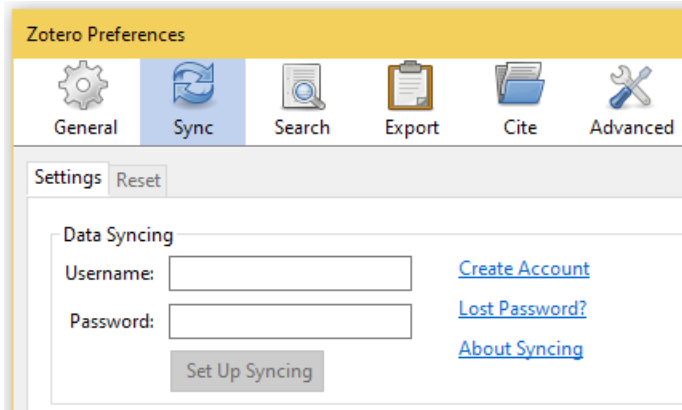
Chapter 12. Setting up file syncing with Zotero Storage

File syncing allows you to access file attachments online and from any computer. Zotero Storage provides each user with 300Mb of free storage and is the recommended option for file syncing.

1. Click **Edit** in the Zotero menu bar and open the **Preferences**.



2. Click on the **Sync** pane and enter your Zotero account data.



3. Click the check box next to the **Sync attachment files in My Library** option to sync files in your library. Click the check box next to the **Sync attachment files in group libraries** option to sync files in group libraries.

File Syncing

☒ Sync attachment files in My Library using Zotero ▼

Download files at sync time ▼

☒ Sync attachment files in group libraries using Zotero storage

Download files at sync time ▼

By using Zotero storage, you agree to become bound by its [terms and conditions](#).

Zotero Storage Plans

Zotero Storage provides space to store your files online and allows you to easily sync your attachments and share them in group libraries. Every Zotero user receives 300Mb of free storage space, but users can upgrade if they need more space.

Table 1. Individual Pricing

Storage	Cost (USD)
300Mb	Free
2GB	\$20/year (or \$1.67/month)
6GB	\$60/year (or \$5/month)
Unlimited	\$120/year (or \$10/month)

Group Libraries

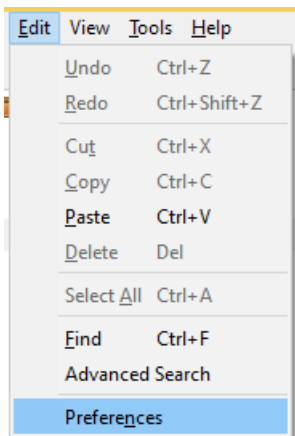
Group Libraries are libraries shared with other users. With Group Libraries, you can easily share collections and work collaboratively. Zotero treats group libraries as separate from your personal library.

Chapter 13. Setting up file syncing with WebDAV

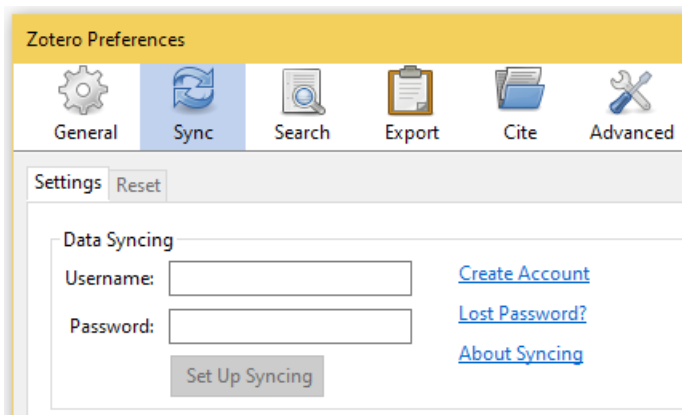
File syncing allows you to access file attachments online and from any computer. WebDAV is a standard protocol for transferring files on the web and can be used to sync your Zotero files.

You will need a WebDAV account to use this method for syncing files. Have the URL provided by the WebDAV service that you are using ready, along with your username and password.

1. Click **Edit** in the Zotero menu bar and open the **Preferences**.



2. Click on the **Sync** pane and enter your Zotero account data.



3. Select the **WebDAV** option to sync files in your library. Then enter the URL, your username and your password for the WebDAV service you wish to use.

File Syncing

☒ Sync attachment files in My Library using WebDAV ▾

URL: https ▾ :// /zotero/

Username:

Password:

Verify Server

4. Click **Verify Server**.

Chapter 14. Linked Files

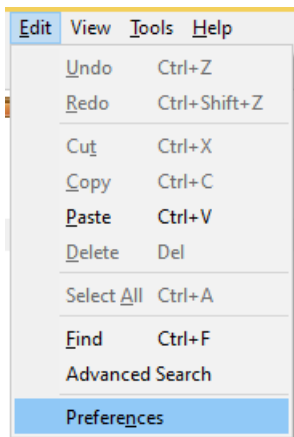
Linked files are shortcuts or links that point a program to the location of the actual file.

Zotero can use linked files to sync files across computers. The links can point to files that are store in a cloud-sync folder like Dropbox or Google Drive. The ZotFile plugin can make managing linked files easier.

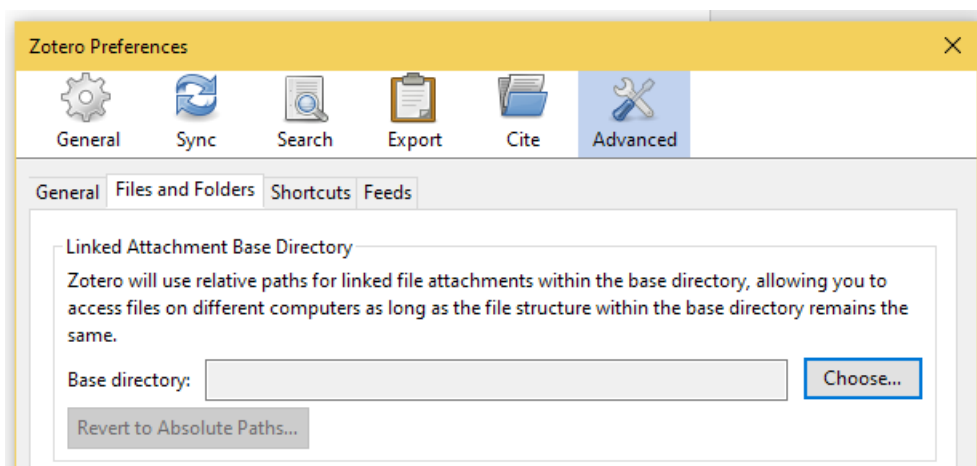
Setting up a Linked Attachment Base Directory

By setting up a linked attachment base directory, Zotero will be able to find files on a computer, even if the path to the folder on the cloud storage service differs. This setting only apples if you don't store attached files in Zotero locally (the default setting).

1. Click **Edit** in the Zotero menu bar and open the **Preferences**.



2. Click on the **Advanced** pane and select **Choose...** to select a linked attachment base direcoty.




ZotFile Plugin

ZotFile is a plugin by Joscha Legewie that automatically renames, moves and attaches PDFs to Zotero items. You can download it from the [support page](#).

Chapter 15. Copying the Zotero data directory

You can back up your Zotero data without using Zotero servers by manually copying your Zotero files to a location of your choice.

1.  **Note:** You can change the default directory where Zotero stores your data in your **Preferences** under the **Advanced** pane.

Navigate to the appropriate Zotero data folder for your operating system.

macOS	/Users/<username>/Zotero
Windows 7 and higher	C:\Users\<User Name>\Zotero
Windows XP/2000	C:\Documents and Settings\<username>\Zotero
Linux	~/Zotero

2. Copy the contents of the Zotero data folder to a location of your choice.

Chapter 16. Zotero groups

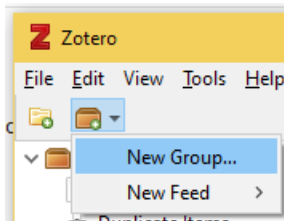
You can create groups to collaborate and share research more easily with other users.

Zotero groups can be an efficient way to share collections with other researchers, work on class projects and keep track of what people in your department are working on. You can have as many group members as you like, and your Zotero storage plan also works for group libraries. Keep in mind that Zotero treats group libraries as separate from your personal library.

Creating new groups

There are two way to create new groups.

1. Click the **New Library** button in the top left of Zotero and select **New Group....**



2. You can also click the **Create a New Group** link on the [Zotero groups page](#).

[Home](#) > Groups

Zotero Groups

[Search for Groups](#)

[Create a New Group](#)

Chapter 17. Group types

You can create three different types of groups with Zotero.

Table 2. Group types

Group type	Description
Private Groups	<ul style="list-style-type: none">• Allows you to collaborate with other users without appearing publicly online• Only visible to members and those who are invited• Hidden from group searches and search engines
Public (closed membership)	<ul style="list-style-type: none">• Controlled group environment with public presence• Visible to everyone, but can only be joined by invitation• Libraries can be visible or made hidden
Public (open membership)	<ul style="list-style-type: none">• Visible to everyone• Anyone can join without moderation• File sharing is not allowed

Chapter 18. Group interaction

You can interact with other groups via Zotero or the website.

If you are a member of a group with an enabled library and have [data syncing \(on page 10\)](#) enabled, the [group library \(on page 14\)](#) will appear in the left pane of Zotero. Zotero treats group and personal libraries as separate. You can also interact with groups on the Zotero website, where you can also search for groups and view other public group libraries. Private groups can use the website to interact with each other from any device.

Chapter 19. My Publications

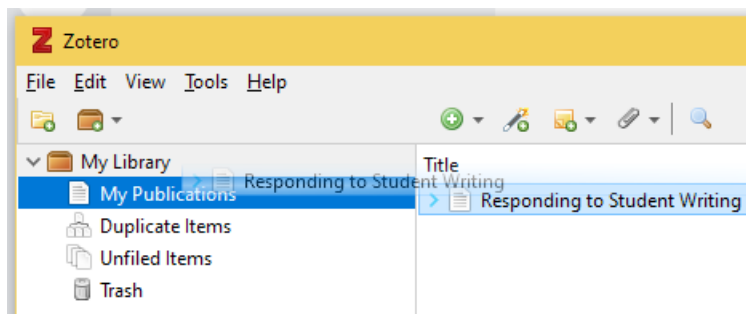
You can create a bibliography of your research with Zotero.

With the My Publications feature, you can automatically create a bibliography with all of your research and easily share it with the Zotero community. My Publications creates a profile page on the website with information about you and a list of your work with links to view them.

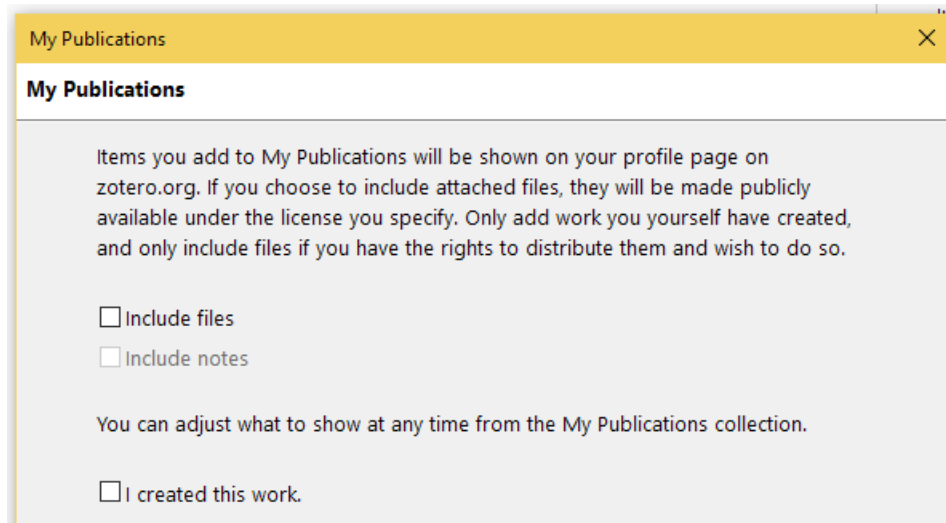
Sharing items, files, notes and links

After dragging an item to My Publications, you can choose whether to share files and notes.

1. Drag the desired item to My Publications on the left pane of Zotero.



2. The My Publications window will appear. Select the desired options by clicking the check boxes.



Group types

You can create three different types of groups with Zotero.

Table 3. Group types

Group type	Description
Private Groups	<ul style="list-style-type: none">• Allows you to collaborate with other users without appearing publicly online• Only visible to members and those who are invited• Hidden from group searches and search engines
Public (closed membership)	<ul style="list-style-type: none">• Controlled group environment with public presence• Visible to everyone, but can only be joined by invitation• Libraries can be visible or made hidden
Public (open membership)	<ul style="list-style-type: none">• Visible to everyone• Anyone can join without moderation• File sharing is not allowed

Chapter 20. Distribution Rights

When publishing your work and sharing files, you must choose which license to attach to it. A window will appear with three options

Table 4. Distribution Rights

License	Description
All rights reserved	Retain all rights. No permission to share files further.
Creative Commons (on page 25) licenses	Allows others to share your work as long as they credit you, link the license and indicate if any changes were made.
Public domain	Waives all rights to your work. This can't be undone.


Creative Commons license

Creative Commons is a nonprofit organization that provides Creative Commons licenses, which allow you to easily share your work by granting copyright permissions. With a Creative Commons license, other people will be able to share your work beyond where you published it, as long as they credit you, link the license and indicate if any changes were made to your work.

Chapter 21. Collections

Items in Zotero libraries can be organized with collections and tags. Both organizational methods have unique advantages and features. Experiment with both to see what works best for your own workflow.

Collections allow hierarchical organization of items into groups and subgroups. The same item can belong to multiple collections and subcollections in your library at the same item. Collections are useful for filing items in meaningful groups (e.g., items for a particular project, from a specific source, on a specific topic, or for a particular course).

 **Note:** Collections are not portable. Copying items between Zotero libraries (My Library and group libraries) will transfer their tags, but not their collection placements.

Creating a New Collection

You can create a new collection to help organize the items in your library such as for a project or a paper.

Collections are useful for filing items in meaningful groups. You can create new Collections however you see fit.

1. Create a new collection
 - Click the **New Collection** button above the left pane in Zotero to add a new collection
 - You can also right-click on **My Library** or the name of a Group library and choose **New Collection** to add a new collection
2. Title your new collection and click **OK**

The new collection will appear as a folder under “My Library” or the selected Group library.

Creating Subcollections

You can create subcollections within your top-level collection.

You can store items in subcollections just as you would in a top-level collection. Adding an item to a subcollection does not duplicate the item, even if it appears in another collection.

Create a subcollection

- Drag an existing collection onto another collection
- Right-click an existing collection and select **New Subcollection**

You can convert a subcollection into a top-level collection by dragging it out of the collection and dropping it into empty space in the left Zotero pane.

Adding Existing Items to Collections

You can add existing items from your library to collections in order to help organize items into collections where they fit best.

Adding existing items to collections is useful when organizing items that you have previously collected into new collections.

1. Select an existing item(s) from your library in the center pane
2. Drag and drop the selected items from the center pane to the collection in the left pane
By default, the items will be added to the new collection but won't be removed from their original location.

Adding New Items to Collections

You can add new items to collections to help organize your library. Find an item you would like to save, and then add it to the collections you see fit.

Adding new items to collections is useful when you are working with new items and you need to catalog them somewhere for later use.

1. Locate a new item from the web
2. Select the collection you want to save the item to
3. Click on the **Zotero Save Button** in your browser

Renaming Collections

You can rename collections in order to best represent the collected items.

You may want to rename a collection as your collection grows in order to better represent the items within it. It is not suggested to rename collections too frequently.

1. Right-click on the collection
2. Select "Rename Collection" and type in the new name of the collection
Collections are sorted alphabetically in your library. You can use punctuation marks to sort collections to the top of the list.

Deleting Collections

You may delete a collection when you no longer wish to use it.

Deleting collections is useful when you no longer have a use for a collection. Deleting a collection will also delete all of the subcollections in it, but not the items in them. Items are still accessible by clicking on My Library or the Group library name.

1. Right-click on the collection
2. Select "Delete Collection"
To delete both the collection and its items, right-click on the collection and choose "Delete Collection and Items" instead

The collection and all of its subcollections will have been removed from your library.

Deleting Items from a Collection

You can delete an item from a collection should you decide you no longer need the item.

Deleting an item from a collection removes the item from your Zotero library entirely. This may be useful for users needing to make space in their libraries.

1. Select the item(s) in the collection
2. Right-click on the item(s), and select "Move Item(s) to Trash"
When "My Library" or a Group library name is selected in the left Zotero pane, pressing the **Delete** key will also move items to the trash. When a collection or subcollection is selected, press **Cmd/Ctrl-Delete** to move the items directly to the trash.

Removing Items from a Collection

You can remove items from a collection should you decide it no longer belongs in that collection.

Removing items from a collection gives you the ability to customize which items are in your collections. If you no longer wish for an item to be included in a collection, you can remove it without deleting the item.

1. Select a collection in the left Zotero pane
2. Select the items in the center pane that you want to remove from the collection
3. Remove items
 - Press the **Delete** key to remove the items from the collection
 - Right-click the selected items and select "Remove Item(s) from Collection"

This only removes the items from the selected collection, not from “My Library” or any other collections.

Moving Items Between Collections

You can move items between collections in order to place items in the collections that best represent the their content.

Once items are placed in a collections, they do not have to remain there permanently. You can move items between collections in order to place items where they best belong. Remember that the “My Library” view always shows all items in your library, so you cannot “move” items out of this view. To see only items that do not belong to any collection in your library, open the **Unfiled Items** special collection.

1. Select item you wish to move
2. Click and drag item to new collection

Option	Description
Mac	Hold Cmd + drag item to collection
Windows/Linux	Hold Shift + drag item to collection

Locating Items in a Collection

You can locate items once they are placed in collections.

Zotero will highlight all of the collections an item is in.

Select item you wish to locate

Option	Description
Mac	Press and hold Option
Windows	Press and hold Control
Linux	Press and hold Alt

After a brief delay, the collections containing the item will be highlighted.

Special Collections

Special collections are collections that have additional features such as "Duplicate Items" and "Unfiled Items".

Special collections offer additional services to the user through automated behaviors. When items do not fit within the guidelines of an existing collections, Special Collections often provide a suitable location.

My Publications

The My Publications special collection allows you to share your own research work (including items, notes, and attachment files) publicly with the world. Drag your publications to this collection to launch the My Publication wizard, which will allow you to select which notes, links, and files are shared.

Duplicate Items

The Duplicate Items special collection shows items that Zotero has identified as potential duplicates. You can use this collection to review and merge duplicate items.

Unfiled Items

Items that are not in any collection can be found in the Unfiled Items special collection at the bottom of the collections list in the left Zotero pane.

Trash

When you delete an item, they are moved to the Trash special collection. By default, items remain in the Trash for 30 days, after which they are deleted permanently.

Enabling Recursive Collections

Enabling recursive collections allows for items that are added to subcollections to also appear in the parent collection.

By default, items added to a subcollection do not automatically appear in the parent collection(s).

Enabling recursive collections is useful if you would like them to appear twice, once in the parent collection and once in the subcollection. Recursive collections are not currently available for the online library at [zotero.org](https://www.zotero.org).

1. Open Zotero system preferences
2. Select the advanced pane
3. Select "Config Editor"
4. Type in "recursive" (without quotes) into the search box


5. Double-click on "extensions.zotero.recursiveCollections"
6. Toggle "recursiveCollections" hidden preference from "false" to "true"

The change will take effect the next time you select a collection, but it will not apply automatically to Zotero running on other computers.

Chapter 22. Tags

Tags are labels that users can use to categorize items in their libraries.

Tags (often called “keywords” in other contexts) allow for detailed characterization of an item. You can tag items based on their topics, methods, status, ratings, or even based on your own workflow (e.g., “to-read”). Items can have as many tags as you like, and you can filter your library (or a specific collection) to show items having a specific set of one or more tags.

 **Note:** Tags are portable. Copying items between Zotero libraries (My Library and group libraries) will transfer their tags.

Tag Selector Tool

The Tag Selector Tool can help users locate all of the tags that have been assigned to the items in the currently selected collection that match the current search.

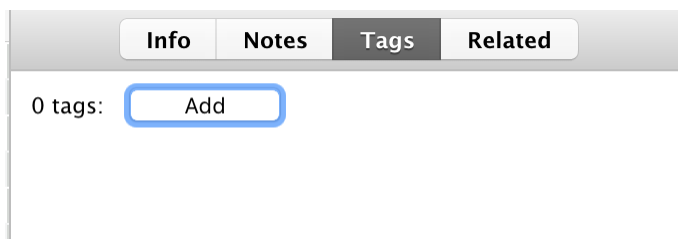
The Tag Selector Tool searchbox filters the results of searches by tag(s). Only items that have all of the selected tags will be shown in the center pane. As you apply filters, the list of tags in the tag selector will be updated to show only the tags assigned to currently visible items. The tag selector is located at the bottom of the left Zotero pane.

Adding Tags to Items

You can add tags to items in order to assign specific items labels.

Tags (often called “keywords” in other contexts) allow for detailed characterization of an item. You can tag items based on their topics, methods, status, ratings, or even based on your own workflow (e.g., “to-read”). Items can have as many tags as you like, and you can filter your library (or a specific collection) to show items having a specific set of one or more tags.

1. Select the item from the center pane
2. Click the Tags tab in the right-hand pane



3. Click Add button
4. Type the tag name
5. Select Enter/Return

You can rename a tag by clicking on it and typing the new name and delete tags using the minus “–” button.

Once you have added the tag it will appear in the tag selector in the left pane.

Editing Tags

You can use the **Tag Selector** to edit and modify tags.

You may want to edit tags when deleting a tag from your library or when merging tags.

Renaming a Tag

You can rename a tag by clicking on the "Rename Tag" in the **Tag Selector** and typing the new name. By doing this, you change the tag name everywhere in your library.

Deleting a Tag

You can delete a single tag by clicking on the minus “–” button.

If you want to delete a tag from your library entirely, right-click the tag and choose “Delete Tag”.

Merging Tags

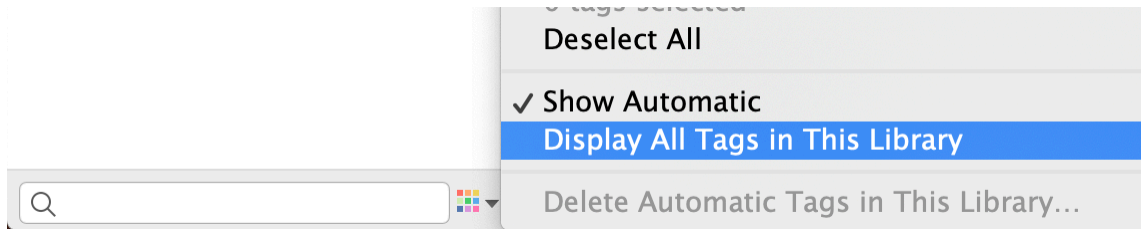
You can merge a group of differently tagged items by replacing the current tag with the name of a different existing one. This will effectively delete the overwritten tag.

Showing All Tags in Library

You can see all of the tags used in a specific library by using the Tag Selector Tool.

You may want to see all of the tags used in a library when determining how to tag a new item. Tags not assigned to currently shown items are grayed out.

1. Click on the multi-color button in the lower-right corner of the Tag Selection Tool
2. Select “Display All Tags in This Library”



Colored Tags

Colored tags make it easy to quickly scan your library for tags that have a certain tag.

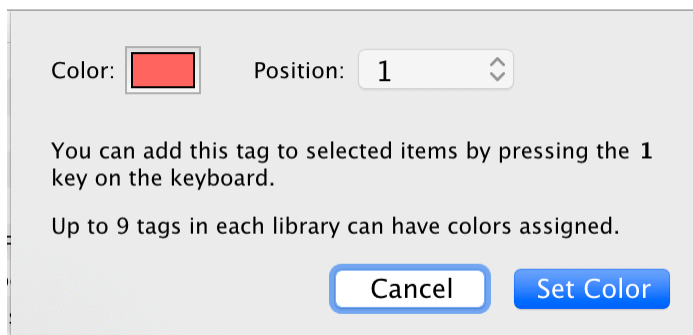
Colored tags appear as small colored squares next to items' titles in the center pane. Colored tags are shown at the top of the tag selector and are always visible (even if not assigned to any visible items). Each colored tag is also assigned a number, corresponding to its position at the top of the tag selector. You can quickly add or remove a colored tag from selected items.

Assigning Colored Tags

Assigning a colored tag can make organizing your library and finding items easier.

Colored tags appear as small colored squares next to items' titles in the center pane. Colored tags are shown at the top of the tag selector and are always visible (even if not assigned to any visible items). Each colored tag is also assigned a number, corresponding to its position at the top of the tag selector. You can quickly add or remove a colored tag from selected items.

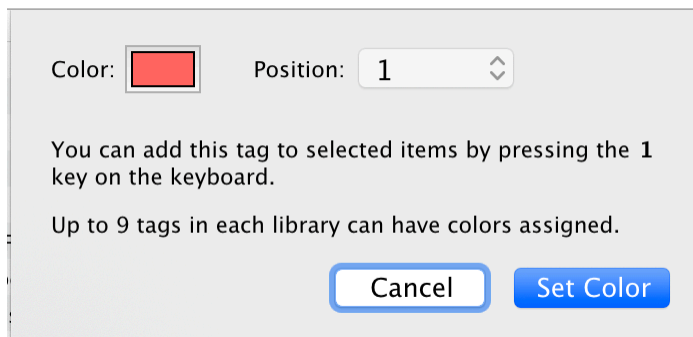
1. Right-click the tag you want to assign a color
2. Select "Assign Color"
3. Select a color from the dropdown box and click "Set Color"



Altering a Colored Tag Tag-Number

Each colored tag is assigned a number in addition to its colored tag, which corresponds to its position at the top of the tag selector. You can quickly add or remove a colored tag from selected items by typing the corresponding number key on your keyboard

1. Right-click the tag
2. Select "Assign Color"
3. Select a new number position



Up to nine tags can be assigned colors and numbers.

Automatic Tags

When items are saved to a Zotero library from the web, tags are sometimes automatically added to items. Automatic tags behave the same as manually added tags but are marked by a red icon in the "Tags" tab of the right-hand Zotero pane (versus the blue icon for regular tags).

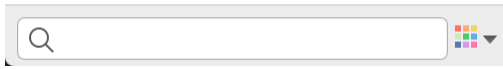
OPAC library catalogs provide subject headings for their records, which are saved as Zotero tags.

Hiding Automatic Tags

You can hide or delete automatic tags just as you would normal tags.

When items are saved to a Zotero library from the web, tags are sometimes automatically added to items. Automatic tags behave the same as manually added tags but are marked by a red icon in the "Tags" tab of the right-hand Zotero pane (versus the blue icon for regular tags).

1. Click on the multi-color button beside the **Tag Selector**



2. Select "Show Automatic"
3. Select "Delete Automatic Tags in This Library"

Chapter 23. Duplicate Detection

Zotero has built-in duplicate detection software to help you save space and stay organized.

As you build your Zotero library, you might introduce a few duplicated items. Zotero currently uses the title, DOI, and ISBN fields to determine duplicates. If these fields match (or are absent), Zotero also compares the years of publication (if they are within a year of each other) and author/creator lists (if at least one author last name plus first initial matches) to determine duplicates. The algorithm will be improved in the future to incorporate other fields.

Finding Duplicates in your Library

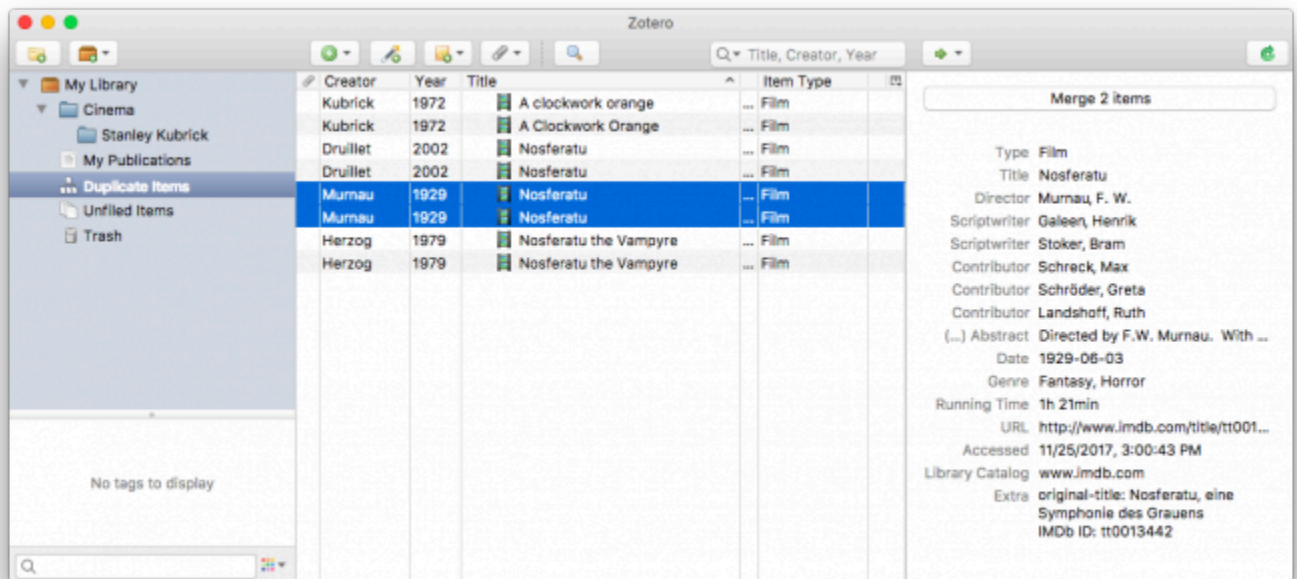
Zotero has built-in duplicate detection software to help you save space and stay organized.

As you build your Zotero library, you might introduce a few duplicated items. Zotero currently uses the title, DOI, and ISBN fields to determine duplicates. If these fields match (or are absent), Zotero also compares the years of publication (if they are within a year of each other) and author/creator lists (if at least one author last name plus first initial matches) to determine duplicates. The algorithm will be improved in the future to incorporate other fields.

Locate duplicate items

- Click on the "Duplicate Items" collection in the left pane
- Right-click the library in the left pane and click "Show Duplicates"

This will show all of the duplicate items in the center pane.

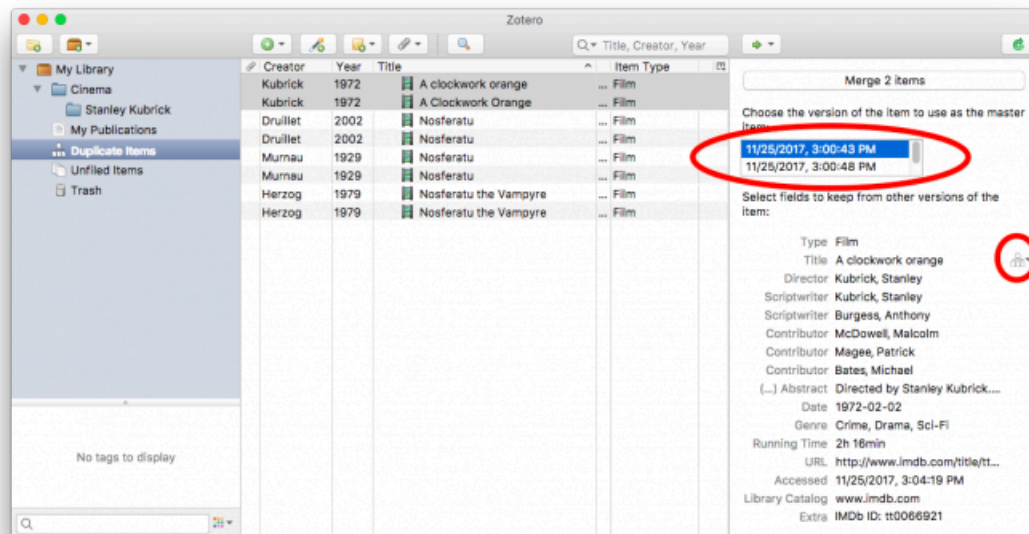


Merging Duplicates

Zotero has built-in duplicate detection software to help you save space and stay organized.

You should always resolve duplicate items by merging them, rather than deleting one of the duplicates. Merges will retain all of the collections and tags of the merged items; deleting one item will lose these data. Merges are also automatically recognized by the word processor plugins and don't affect your automatically generated citations and bibliographie

1. Navigate to the "Duplicate Items" collection
2. Select item from center pane
 - Zotero will automatically co-select the other items that it thinks are duplicates.
3. Click the "Merge Items" button in the right pane to merge the items



If the item fields don't match completely, you can select one item to be the “master” from the list at the top of the right pane, then select alternative versions of mismatched fields using the icons to the right of each field.

Chapter 24. Notes

Notes can be added to your library just as other items in your library.

In addition to items and file attachments, you can also store notes in your Zotero library: child notes, which belong to a specific item, and standalone notes. Notes are synced along with item metadata; they don't count against your Zotero file storage quota. Notes are searchable and support HTML formatting.

Child Note

Child notes are notes that belong to a specific item.


Standalone Note

Standalone notes are notes that are not directly related to any item. Standalone notes will appear alongside any other items in your library.

Adding a Child Note

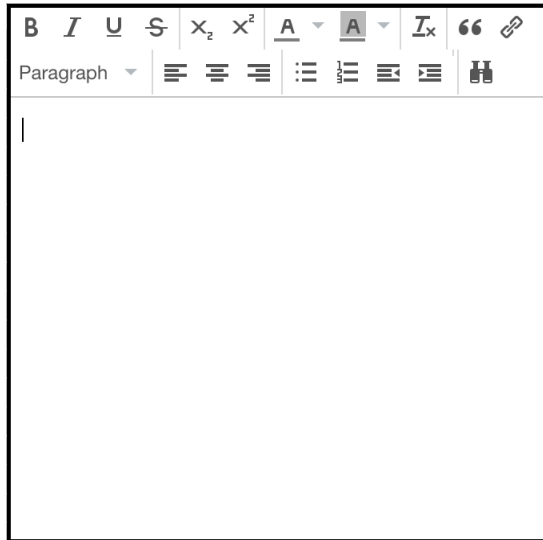
Add a child note to an existing item in the library.

Child notes are notes that belong to a specific item.

1. Select an item in the center pane
2. Click the "New Note" button  on the top of the center pane
3. Select "Add Child Note"
4. Type text into note

Text in notes will automatically save as you type.


A note will be created as an attachment to the item, and a note editor will appear in the right-hand pane.



Adding a Standalone Note

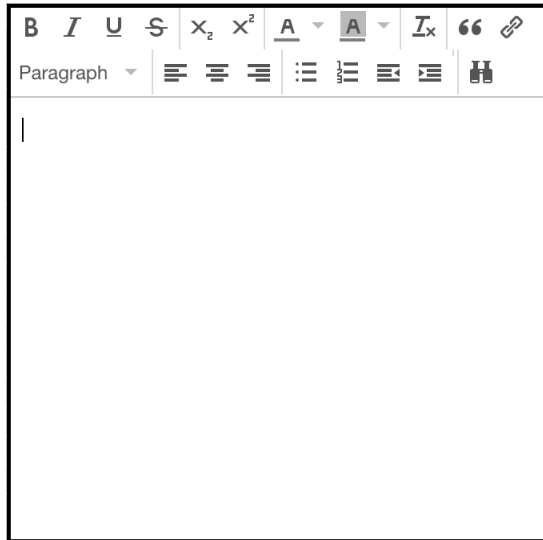
Add a standalone note to create a note that is independent of all items in the library.

Standalone notes are notes that are not directly related to any item. Standalone notes will appear alongside any other items in your library.

1. Click the "New Note" button  on the top of the center pane
2. Select "New Standalone Note"
3. Type text into note

Text in notes will automatically save as you type.

A note will be created as an attachment to the item, and a note editor will appear in the right-hand pane.

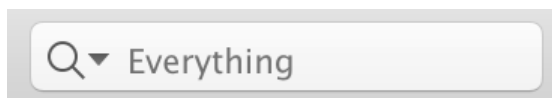


Searching a Note

Notes can be searched via the general Zotero search.

Quick searching is the fastest way to locate an item in your library. When running a quick search, the search will likely return multiple semi-specific results.

1. Click inside of the search box at the top right of the center pane
2. Type search terms



As you type, only those items in the center column that match the search terms will remain.

Tagging a Note

Adding Images to Notes

You can embed images into Zotero notes by dragging them from your filesystem. Note, however, that embedded images are not officially supported and will not sync (and may potentially cause other syncing problems).

Add image to note

- Drag image from filestream
- Add image as separate attachment file

NEEDS A CONREF TO ATTACHING FILES

Chapter 25. Related Items

A "relation" between items can be used to set up a relationship between any pair of items in a single library.

In addition to collections and tags, a third way to express relationships between items is by setting up "relations". Relations can set up between any pair of items in a library (it is not possible to relate items from different libraries).

Chapter 26. Relating Items

A "relation" between items can be used to set up a relationship between any pair of items in a single library.

In addition to collections and tags, a third way to express relationships between items is by setting up "relations". Relations can set up between any pair of items in a library (it is not possible to relate items from different libraries).

1. Select an item in the center pane
2. Navigate to the "Related" tab and click on "click here"

Title	Creator	Item Type	Date Modified
A_CASE_OF_HYSTERIA..pdf		Note	11/11/2020, 2:59:11 PM
Adolescence._IMPORTANCE_OF_TH.pdf		Atta...	9/30/2020, 12:40:44 PM
Burroughs--Tarzan_of_the_Apes--1914.pdf		Atta...	9/30/2020, 12:40:46 PM
Cather--Pauls_Case--McClures_25--May_1905.pdf		Atta...	9/30/2020, 12:40:55 PM
Crane, Stephen--miscellaneous poems--The Blac...		Atta...	9/30/2020, 12:40:53 PM
Driving Off the Spleen: Moby-Dick and Healing fr...	Bellini	Jour...	9/30/2020, 12:40:59 PM
ElliottEmoryBan_1988_RealismAndRegionalism_C...		Atta...	9/30/2020, 12:39:17 PM
Essay 2.docx		Atta...	9/30/2020, 12:40:00 PM
Fast and Loose with John Donne's "The Flea".pdf		Atta...	9/29/2020, 7:00:25 PM
How to be popular		Atta...	9/30/2020, 12:40:04 PM
Hughes and Communism.pdf		Jour...	9/30/2020, 12:38:41 PM
		Atta...	9/30/2020, 12:40:18 PM

ElliottEmoryBan_1988_Rea

Filename: ElliottEmoryBan_...

Pages: 26

Modified: 9/30/2020, 12:4...

Indexed: Yes

Related: [\[click here\]](#)

Tags: [\[click here\]](#)

B I U

Paragraph

A window will appear, prompting you to select a second item

3. Select a second item from the same library
4. Click "OK"

The selected items will now show up as related items in the "Related" tab, and clicking an item will take you straight to that item.

Note: Note that when you relate item A to B, B will be automatically related to A. But relations are not transitive: relating A to B, and B to C, will not automatically relate A to C.

Chapter 27. Quick Search

Quick searches provide a fast way to find items in a library or collection.

A user can conduct a quick search in three different modes.

“Title, Year, Creator”

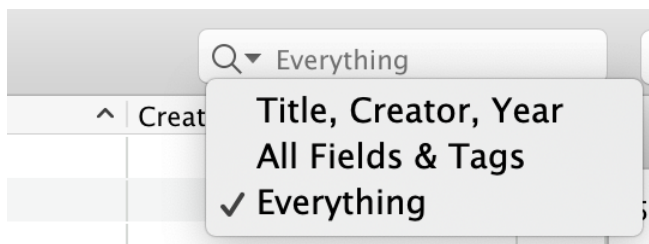
Matches against these three fields, as well as publication titles.

“All Fields and Tags”

Matches against all fields, as well as tags and text in notes.

“Everything”

Matches against all fields, tags, text in notes, and indexed text in PDFs (this requires that PDF indexing be enabled).

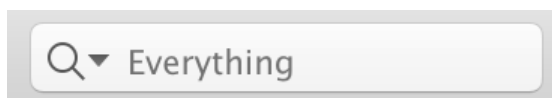


Running a Quick Search

Quick searches provide a fast way to find items in a library or collection.

Quick searching is the fastest way to locate an item in your library. When running a quick search, the search will likely return multiple semi-specific results.

1. Click inside of the search box at the top right of the center pane
2. Type search terms



As you type, only those items in the center column that match the search terms will remain.

Chapter 28. Advanced Search

Advanced searches offer more and finer control than quick searches, and allow you to make saved searches.

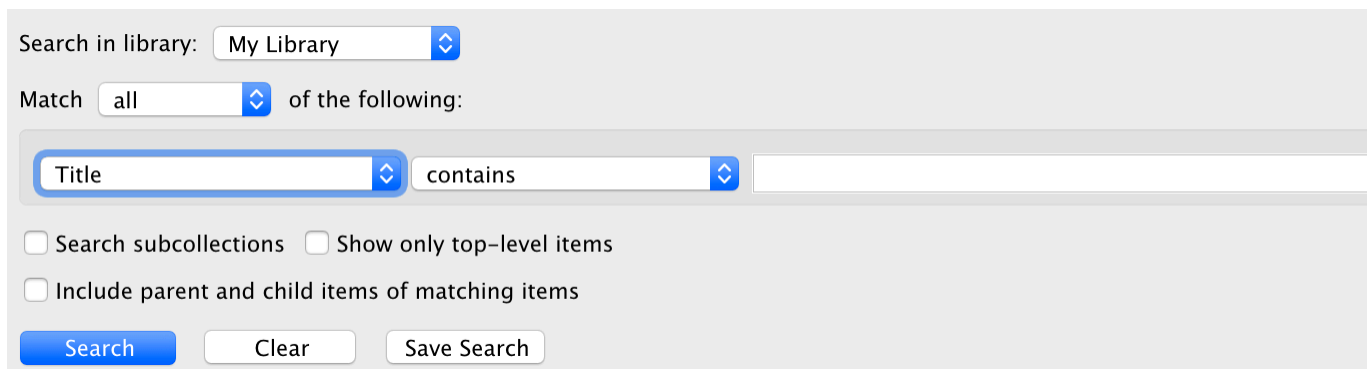
With advanced searches you can filter items by the content of specific fields or by other properties, like item type or the collection an item belongs to. An advanced search might be necessary when looking for one specific item in your library. The more information you have on the item you are searching for, the more specific your results will be.

Running an Advanced Search

Advanced searches offer more and finer control than quick searches, and allow you to make saved searches.

You may want to run an advanced search when looking for a specific item in your library. With advanced searches, you can specify the search parameters to return only items that meet the search criteria. Advanced searches can be saved to collections.

1. Click on the magnifying glass icon located at the top of the center pane
2. Specify search parameters in the search window located at the top of the pane

A screenshot of the Advanced Search interface. At the top, there is a dropdown menu labeled "Search in library:" with "My Library" selected. Below this is a "Match" dropdown set to "all" followed by the text "of the following:". Underneath is a search criteria row with a dropdown set to "Title", a dropdown set to "contains", and an empty text input field. Below the criteria row are three checkboxes: "Search subcollections", "Show only top-level items", and "Include parent and child items of matching items". At the bottom are three buttons: "Search" (highlighted in blue), "Clear", and "Save Search".

Search in library: My Library

Match all of the following:

Title contains

☐ Search subcollections ☐ Show only top-level items

☐ Include parent and child items of matching items

Search Clear Save Search

In this window, you can filter items by the content of specific fields or by other properties, like item type or the collection an item belongs to. Multiple filters can be set up by clicking the plus button.

3. Click the "Search" button

All of the items that match the specific search parameters will populate in the center pane below

Saved Searches

You can save an Advanced Search using the "Save Search" feature.

When you save an Advanced Search, it appears as a collection in your library with a Saved Search

icon .

Saved Searches are continuously updated.

Saved searches only store the search criteria, not the search results.

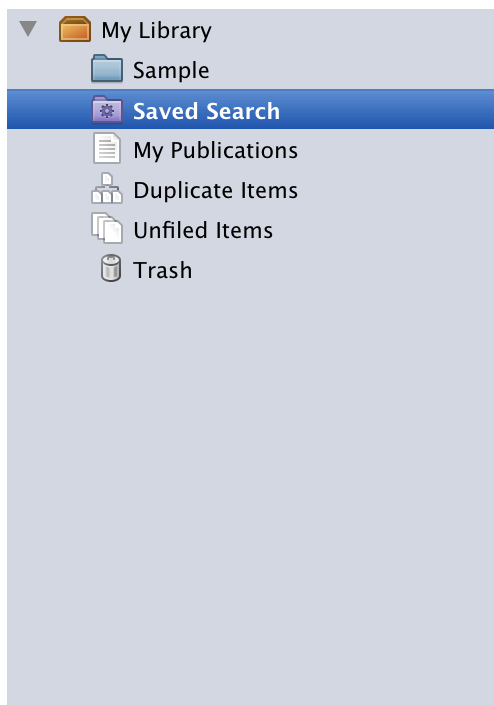
Saving a Search

You can save an Advanced Search using the "Save Search" feature.

Saving a search can be useful for storing previous search criteria for a later date.

You have completed an Advanced Search

1. Click the "Save Search" button in the Advanced Search window
2. Enter a name for your saved search
3. Click the "OK" button




Chapter 29. PDF Full-Text Indexing

Full-text PDF indexing allows embedded text within PDFs to be searched with Quick Search (via the “Everything” option) and Advanced Search (via “Attachment Content”).

You can control how much text in a PDF is indexed in the Search pane of Zotero preferences (default: 500000 characters, 100 pages). Indexing happens automatically in the background when Zotero is idle. You can remove indexed text with the “Clear Index...” button or re-create the index from scratch using the “Rebuild Index...” button. You can check the index status of any PDF attachment by selecting the attachment item in the Zotero library and looking at the “Indexed:” field in the right pane.

If an item isn't being indexed (e.g., if it is not showing up in an 'Everything' Quick Search), verify that the item has searchable text and that the text is properly stored in the PDF (e.g., try to copy text out of the document and ensure that it is high quality). If the PDF has valid text, rebuild the item's index by right-clicking on it and choosing “Reindex Item”. If you are still having issues, please ask a question on the Zotero forums.

 **Note:** At this time, only PDF full text content (and plain text files) can be indexed by Zotero. Other document types (e.g., .docx, .odt, .epub) cannot be indexed by Zotero.

Chapter 30. Sorting Items

Items in the center pane can be sorted by various properties, such as their title, creators, or the date they were added to your library.

You change the way you sort your library items based on your preferred library preferences. By default, properties in the center pane are arranged from left to right in the order in which they are shown in the dropdown menu, and Zotero will show columns for the Title, Creators, and Attachments properties in the center pane.

Change the way items are sorted


Click on any of the column headers at the top of the center pane to.

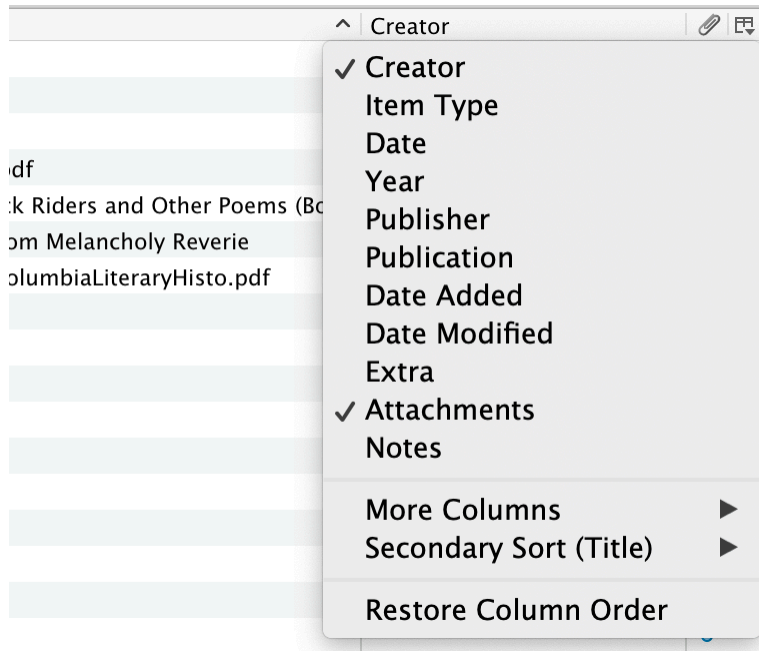


Toggling ascending and descending sorts

Clicking a header multiple times toggles between ascending and descending sorts (the header will show an upward and downward arrow, respectively).

Changing library organization

You can change which properties are shown by clicking the sort icon , found to the right of the column headers. Checking properties in the dropdown menu adds them to the center column, and unchecking removes them.



Choosing a secondary sort

For each column, you can also choose the Secondary Sort field (which field is used to break ties when sorting) by clicking on the sort icon and selecting "Secondary Sort".

Chapter 31. Citation Styles

Zotero ships with several popular citation styles for creating citations and bibliographies, and over 8,100 additional styles can be found in the Zotero Style Repository: <https://www.zotero.org/styles> All these styles are written in the Citation Style Language (CSL), <https://citationstyles.org/>, a format also supported by Mendeley, Papers, and many other programs.

Zotero Style Manager

The Style Manager displays the currently installed citation styles and the date they were last updated. Access under the "Cite" pane in Zotero.

Zotero Style Repository

An collection of styles external to Zotero, accessed through the "Cite" pane: <https://www.zotero.org/styles>

Managing and Editing Citation Styles

This task describes how to manage and edit Citation Styles in Zotero.

Follow the steps to manage and edit Citation Styles in Zotero.

1. Open up the "Cite" pane in Zotero, and click on the "Style" tab. Visual: .
2. Download additional styles directly from the Zotero Style Repository (<https://www.zotero.org/styles>) by clicking the "Get additional styles..." link.
3. You can also install a local Citation Style Language (CSL) style file (<https://citationstyles.org/>) by clicking the "+" button and locating the style file on your computer.

Chapter 32. Quick Copying

This task describes how to quickly add references to a paper, email, or blog post.

Follow the steps to quickly copy references.

1. Select items in the center column.
2. Drag them into any text field.

RFT Scan

This task describes how to use Zotero's RFT Scan feature to create a fully cited document without having to use a word processor plugin.

Follow the steps to use Zotero's RFT Scan feature:

1. Create a new document in the Rich Text Format (RTF) and start writing.
2. Download the RFT citation style plugin: <https://www.zotero.org/styles?q=id%3Artf-scan>
3. Format your text according to these specifications: https://www.zotero.org/support/rtf_scan

Right Click To Create A Citation

This task describes how to right click to create a citation in Zotero.

Follow the steps to install the software on a Windows 10 platform.

1. Highlight one or more references
2. right-click (or control-click on Macs) to select "Create Bibliography from Selected Item(s)..."
3. select a citation style for your citation/bibliography format and choose either to create a list of Citations/Notes or a Bibliography
4. Then choose one of the following four ways to create your citation/bibliography: Save as RTF will allow you to save the bibliography as a rich text file. Save as HTML will allow you to save the bibliography as a HTML file for viewing in a web browser. This format will also embed metadata allowing other Zotero users viewing the document to capture bibliographic information. Copy to Clipboard will allow you to save the bibliography to your clipboard to paste into any text field. Print will send your bibliography straight to a printer.

Chapter 33. Reports

Reports are simple HTML pages that give an overview of the item metadata, notes, and attachments of the selected items. You can print them, post them to the web, and email them.

Chapter 34. Word Processor Plugins

Word Processor Plugins are the easiest way to automatically generate bibliographies from Zotero. Generate dynamic bibliographies, in-text citations, and footnotes with Google Docs, Word, and LibreOffice.

Dynamic Bibliography

Updates bibliography in other locations when you make changes. For example, Insert a new in-text citation in your manuscript, and the bibliography will be automatically updated to include the cited item. Or correct the title of an item in your Zotero library and with a click of a button the change will be incorporated in your documents.

Word Processor Plugins

Links to instructions for using the Zotero with Word, Google Docs, and LibreOffice Plugins.

Using the Zotero Word Plugin https://www.zotero.org/support/word-processor_plugin_usage

Word Plugin Instructions on the Zotero Plugin Tab, Citing, Bibliography, Document Preferences, Customizing Cites, and more.

Using Zotero with Google Docs https://www.zotero.org/support/google_docs

Google Doc format Instructions on Citation Interface, Authentication, Citing, Bibliography, Collaboration, and more.

Using the LibreOffice Plugin https://www.zotero.org/support/libreoffice-writer_plugin_usage

LibreOffice Plugin Instructions on the Zotero Plugin Toolbar, Citing, Bibliography, Document Preferences, Keyboard Commands, and more.

Troubleshooting https://www.zotero.org/support/word_processor_plugin-troubleshooting

Troubleshooting for all plugins and platforms. Common errors like if the Zotero Toolbar doesn't appear, Debugging broken documents, and more.

Chapter 35. Items

Zotero allows you to place objects in a central library database. Items may include material such as books, webpages, and journal articles.


Zotero's function as a personal database of items provides a method for graduate students to store important files for projects, research assignments, course readings and more. Since research usually involves using multiple types of sources from journal articles to printed books, Zotero's wide range of item types to store offers flexibility as to how students can use it as a organized storage system.

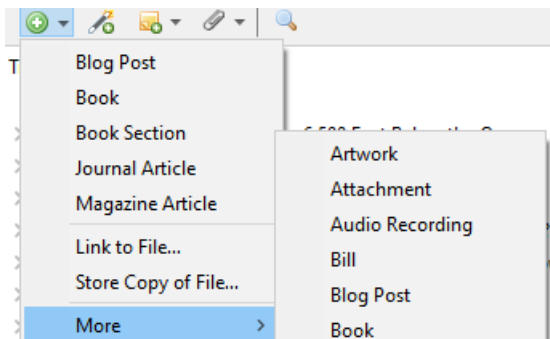
Manually Create An Item

Create a new item on Zotero using the **new item button**.

You must know the category of the item you want to create such as a book, blog post, journal article etc.

Create a new item on Zotero using the **new item button**. The item can be any type from the Zotero drop down menu selection.

1. Click the **new item button**  and find the category of your item.



2. Click the category of your item.

The new item will appear based on the category chosen.

Title	Creator	Item Type
		Book

Chapter 36. Items by Identifier

Zotero allows you to create items via identifier, including the ISBN, Digital Object Identifier (DOI) or PubMed ID.

Zotero provides an option to manually create items by identifier using the add item by identifier button in any version of the software.

When you create an item by identifier, Zotero automatically searches for the information provided by the identifier. Zotero populates the information gathered from the source and may also upload the full item text as a child item.

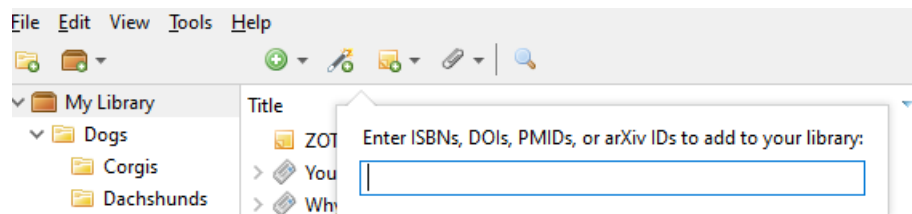
Create Item by Identifier

Students may add items via unique ISBN, DOI or PubMed ID identifiers.

You must first obtain the unique identifier number for your item.


Store referenced books and journal articles obtained from school library and academic databases for later use.


1. Copy the identifier from your web or print source and then click on the **Add items by identifier** button.



2. Type out or paste your source's identifier in the **Identifier box**
3. Type any additional information about the source in the **Information tab**

The screenshot shows the 'Info' tab in Zotero for a 'Blog Post' item. The 'Title' field is empty and has a blue border. Below it, a list of fields is shown: Author (last), (first) with a text input and buttons; Abstract; Blog Title; Website Type; Date; URL; Accessed; Language; Short Title; Rights; and Extra.

 **Important:** Zotero will automatically populate information about your source into the **Information tab**. Make sure this information has populated correctly for key sections: author, title, and publication.

 **Note:** Zotero will automatically add a source file from online content if it is available. It will exist as a child item of your source via a file type such as a PDF.

Types of Identifiers

Zotero can store items by identifier and use certain databases to look up item metadata.

Library of Congress and Worldcat

<https://www.worldcat.org/>

Zotero uses the Library of Congress and Worldcat databases to access ISBN and other item metadata.

Crossref <https://www.crossref.org>

Zotero uses the Crossref database to access DOI and other item metadata.

NCBI PubMed <https://pubmed.ncbi.nlm.nih.gov/>

Zotero uses the Crossref database to access PubMed IDs and other item metadata.

Identifier

Unique specification for individual items. This can include the ISBN, DOI or PubMed ID.

Chapter 37. Items via Connector

Zotero allows you to save items via the connector tool installed on your browser.

Types of Items

Webpages

Webpages use the zotero connector tool to collect bibliographic information about documents you access while searching the web. Webpages can contain various file types, and the Zotero connector tool will detect the file type before the item is saved in the library.

Webpages with snapshot

Webpages use the zotero connector tool to collect bibliographic information about documents you access while searching the web. Zotero can take snapshots of webpages to include previews of stored information in your library.

Zotero Connector Tool

Zotero's connector tool allows you to easily save items via any web browser of your choice.

Zotero Chrome Connector	The connector tool senses content as you browse the web on Chrome. You can save content to Zotero with a single click.
Zotero Firefox Connector	The connector tool senses content as you browse the web on Firefox. You can save content to Zotero with a single click.
Zotero Safari Connector	The connector tool senses content as you browse the web on Safari. You can save content to Zotero with a single click.
Zotero Edge Connector	The connector tool senses content as you browse the web on Edge. You can save content to Zotero with a single click.

Compatible website lists for translators

Zotero uses translators to import website data into your library.

Library Catalogs	Zotero uses library cataloging systems to import materials from academic and non-academic libraries.
Databases	Zotero can import data from popular electronic databases.

Individual	Zotero can use individual site translators to get metadata from verified sites such as
Site Trans-	Amazon, The Economist and The New York Times to detect and import metadata from
lators	websites.

Translator

Software used to extract metadata from a webpage.

Chapter 38. File location

Files can be stored in multiple locations in the Zotero library.

Files can be stored as singular items, items grouped in collections, items grouped in subcollections, and items located in group libraries.

Chapter 39. File Creation

Multiple file types can be created and stored in the Zotero library.

File types such as PDF and Webpages can be stored as items in the Zotero library. There are multiple methods to create stored files such as: importing pdfs, importing from other reference libraries, importing from databases, creation via attachments, and creation via links.

Import pdf

Import a pdf file into your library.

You must have a pdf file ready to import into your library.

Import a pdf file into your library to create an item with a pdf file attached. You can import pdfs through drag and drop, saving from a webpage, adding a pdf by identifier, or adding an attachment. This procedure is for that of drag and drop for pdf files.

1. Open the folder on your computer where your pdf is located.
2. Left click and hold the pdf item you want to import.
3. Holding left click, drag your item into Zotero. Release the left click for the item to be stored.
4. Verify the title information populated by Zotero is correct for your item.

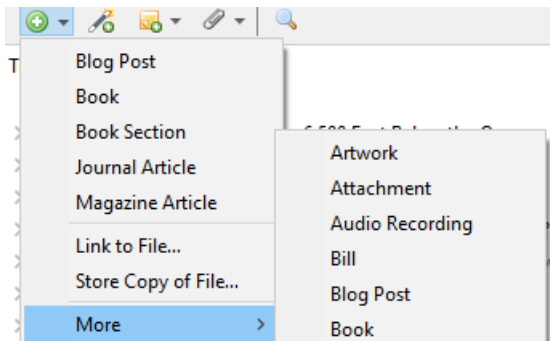
Create linked file

Create a new linked item in your library.

You must know the category of the item you want to create such as a book, blog post, journal article etc.

Create a new linked item in your library using the **new item button**. and the link to file category.

1. Click the **new item button**  and find the category of your item.



2. Click link to file category.
3. Locate the file on your computer and double click it.

The new item will appear with a file attached to the item as a linked pdf attachment.

Title			Creator	Item Type
▼	Effects of restaurant green practices: Which practices are important and ...		Jeong and Jang	Journal Art...
▼	Effects of restaurant green practices_ Which practices are import.pdf			Attachment

Chapter 40. File location

Files can be stored in multiple locations in the Zotero library.

Files can be stored as singular items, items grouped in collections, items grouped in subcollections, and items located in group libraries.

Chapter 41. Large scale imports from databases

You can import a large number of items from scholarly databases.

Databases such as ProQuest, Google Scholar, and Web of Science may lock you out if you try to import too many sources individually. Files must be exported through reference manager tools.

Import existing libraries into Zotero

Import files into Zotero from existing libraries in other reference managers.

You must have files stored in another reference manager such as EndNote, Citavi, or Mendeley.

Libraries of information for your projects contained in other reference managers can be transferred to Zotero. This makes it easy to keep all sources in one place.

1. Export the bibliographic data from your other reference manager.
2. Click file in the **zotero library menu**.
3. Click import and find your exported file.
4. Select the file and click open.

The files from your other reference manager will populate into your library as a date-stamped collection.

Compatible software platforms

Other reference managers can create compatible files to import their libraries into Zotero.

Importing records from Mendeley. https://www.zotero-.org/support/kb/mendeley_import

The Mendeley reference manager is compatible with Zotero for library file imports.

Importing records from EndNote. https://www.zotero-.org/support/kb/endnote_import

The EndNote reference manager is compatible with Zotero for library file imports.

Importing records from Citavi. <https://www.zotero-.org/support/kb/import-from-citavi>

The Citavi reference manager is compatible with Zotero for library file imports.

Importing records from other standardized formats.

https://www.zotero.org/support/kb/importing_standardized_formats

Zotero has various other formats to import bibliographic data from reference managers.

Chapter 42. Item edits

You can edit and view bibliographic information about your item.

Inputting as much bibliographic information about your item such as author names, journal abbreviations, titles and links can help you correctly cite and reference your sources for research.

Chapter 43. Add item information

Add bibliographic information to your items.

Add bibliographic information about your item such as author names, journal abbreviations, titles and links can help you correctly cite and reference your sources for research.

1. Click the item you want to edit in the center pane.

Title	Creator	Item Type	Date
▼ Effects of restaurant green practices: Which practices are important and ...	Jeong and Jang	Journal Art...	
Jeong and Jang - Effects of restaurant green practices Which pract.pdf		Attachment	

2. Insert title information.
3. Click the **plus button** to insert multiple author names.
4. Insert abstract, publication, DOI, Journal Abbr (journal abbreviation), and URL information.
5. Insert any other information you have about your item.

Info	Notes	Tags	Related
------	-------	------	---------

Item Type Journal Article

Title Effects of restaurant green practices: Which practices are important and effective?

▼ Author Jeong, EunHa

▼ Author Jang, SooCheong

Abstract

Publication

Volume

Issue

Pages 23

Date

Series

Series Title

Series Text

Journal Abbr

Language en

DOI

ISSN

Short Title

URL

6. Insert any relevant citation information in the Extra category.