

# **Organizing Your Library and Taking Notes**

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# Chapter 1. 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
<b>Mac</b>	Hold <b>Cmd</b> + drag item to collection
<b>Windows/Linux</b>	Hold <b>Shift</b> + 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
<b>Mac</b>	Press and hold <b>Option</b>
<b>Windows</b>	Press and hold <b>Control</b>
<b>Linux</b>	Press and hold <b>Alt</b>

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 collection, 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 2. 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.

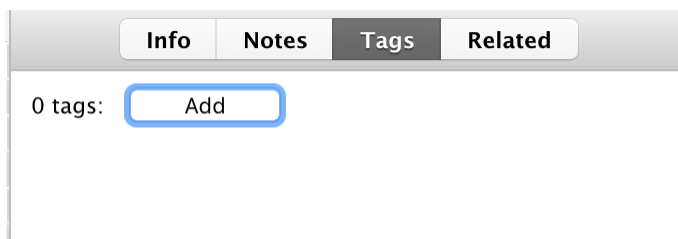
The Tag Selector Tool searchbox filters the results of searches by tag(s). Only items that have all of the selected tags will be shown in the center pane. As you apply filters, the list of tags in the tag selector will be updated to show only the tags assigned to currently visible items. The tag selector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

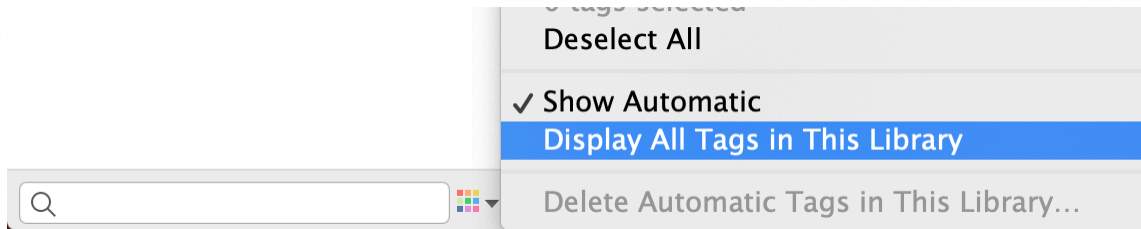
You can merge a group of differently tagged items by replacing the current tag with the name of a different existing one. This will effectively delete the overwritten tag.

## 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.

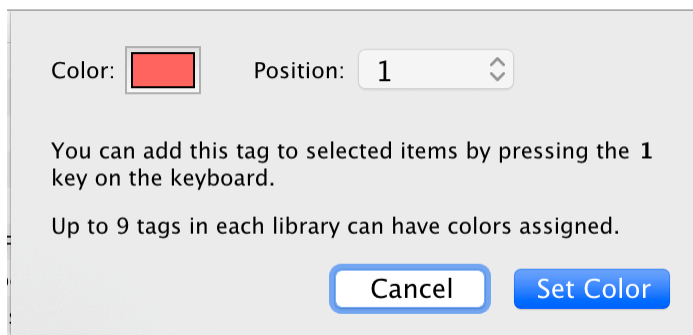
Colored tags appear as small colored squares next to items' titles in the center pane. Colored tags are shown at the top of the tag selector and are always visible (even if not assigned to any visible items). Each colored tag is also assigned a number, corresponding to its position at the top of the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

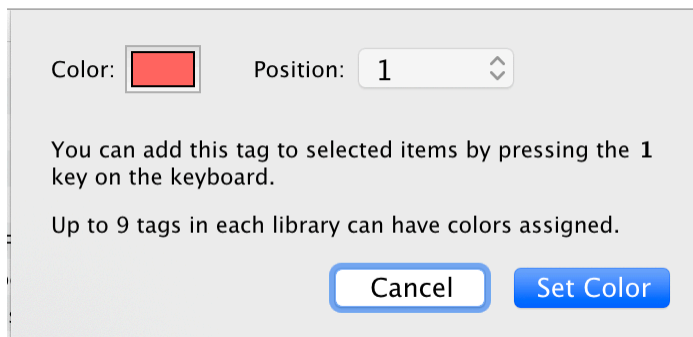
1. Right-click the tag you want to assign a color
2. Select "Assign Color"
3. Select a color from the dropdown box and click "Set Color"



## 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 3. 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

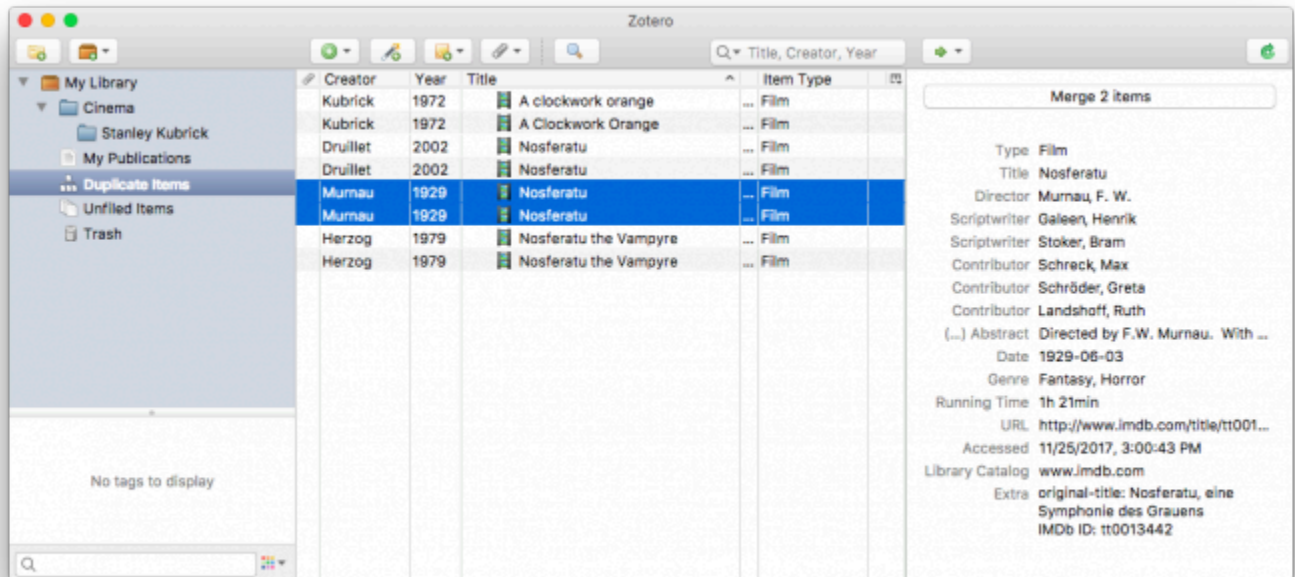
Zotero has built-in duplicate detection software to help you save space and stay organized.

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.



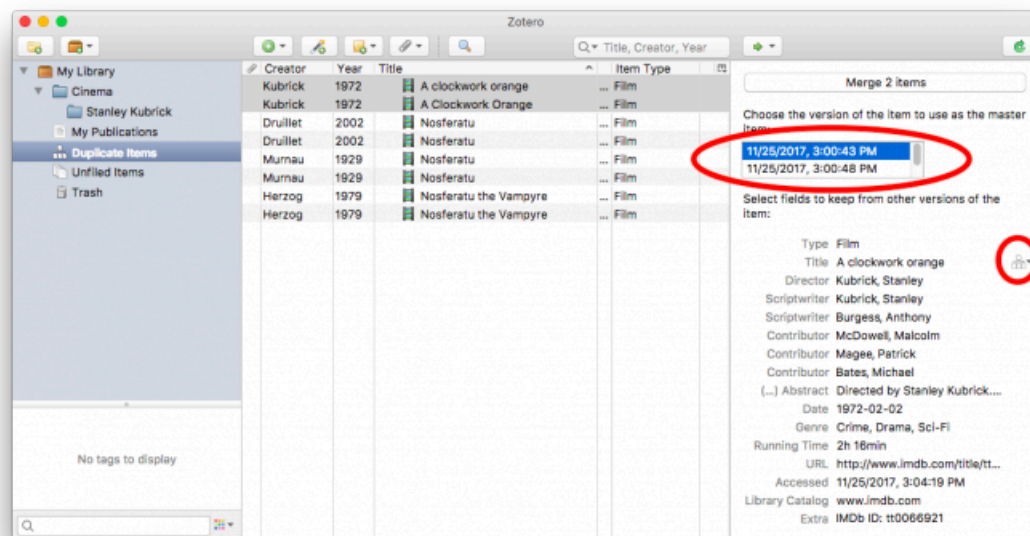
## Merging Duplicates

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 4. 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

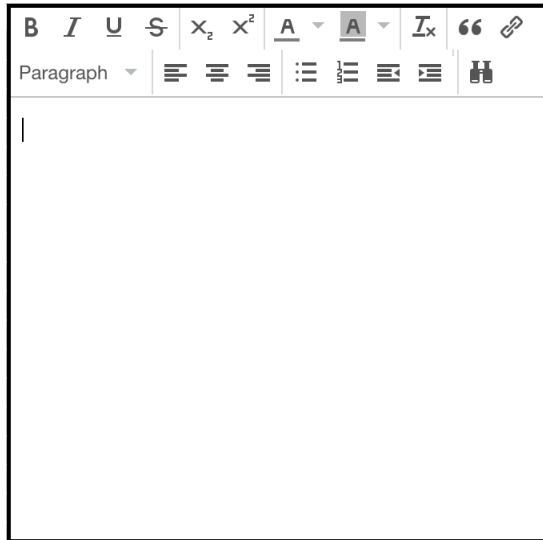
Add a child note to an existing item in the library.

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

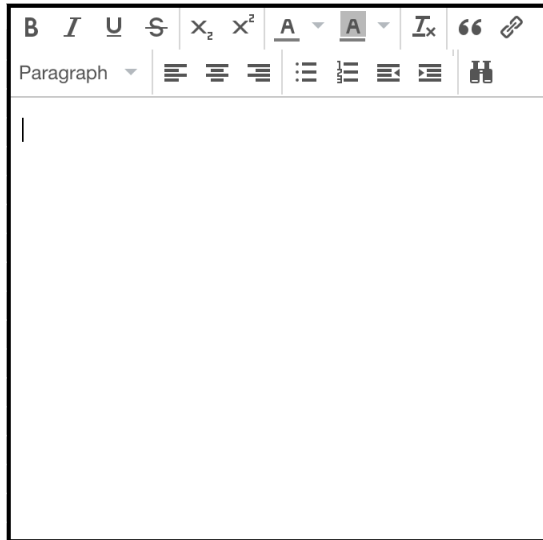
Add a standalone note to create a note that is independent of all items in the library.

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.

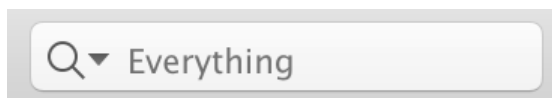


## Searching a Note

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 5. 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 6. 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 S x<sub>2</sub> x<sup>2</sup>**

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 7. 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”**

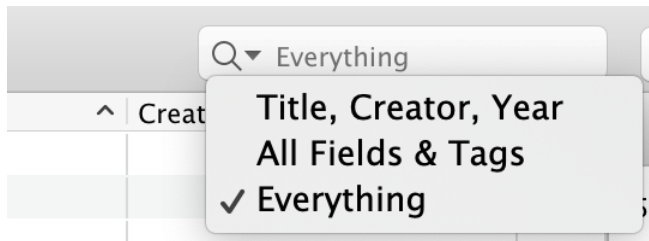
Matches against these three fields, as well as publication titles.

## **“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).

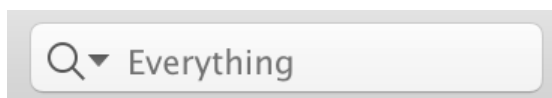


## Running a Quick Search

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 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 8. Advanced Search

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

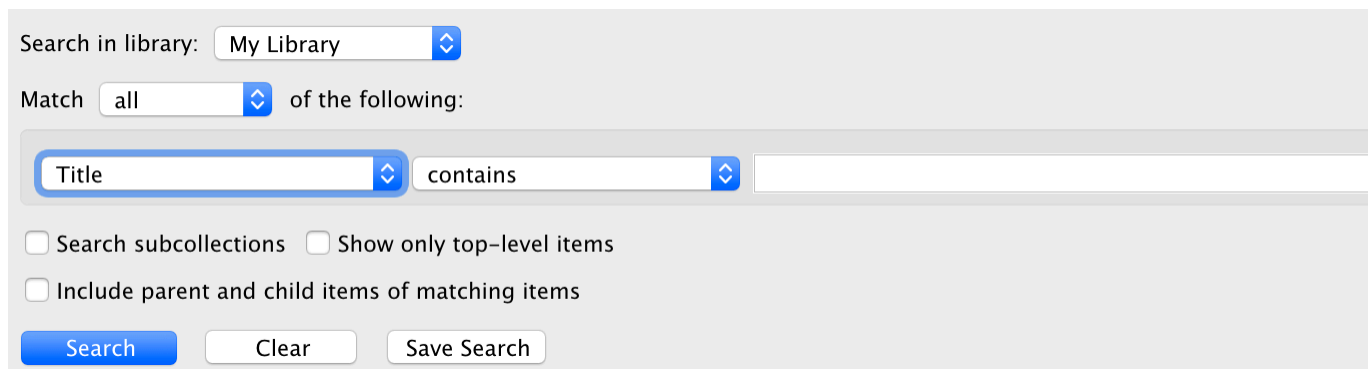
With advanced searches you can filter items by the content of specific fields or by other properties, like item type or the collection an item belongs to. An advanced search might be necessary when looking for one specific item in your library. The more information you have on the item you are searching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

The image shows a search interface with a light gray background. At the top, there's a section labeled "Search in library:" followed by a dropdown menu showing "My Library". Below this is a "Match" dropdown set to "all" and the text "of the following:". Underneath is a search criteria row with a dropdown set to "Title", followed by 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" (blue), "Clear" (white), and "Save Search" (white).

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.

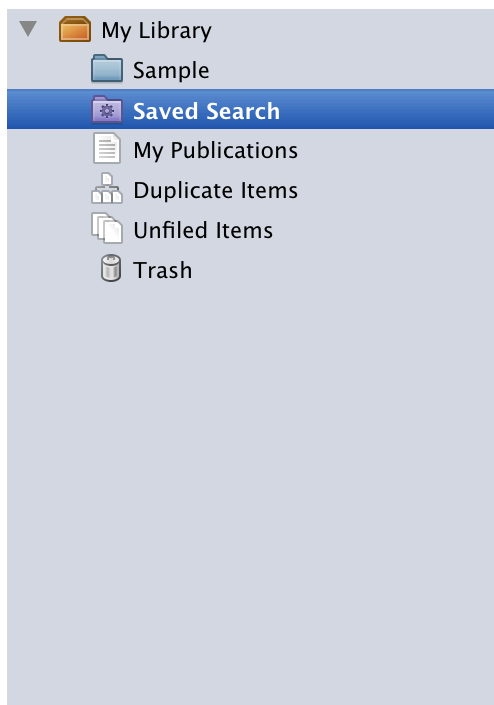
## Saving a Search

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 9. 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 10. 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.

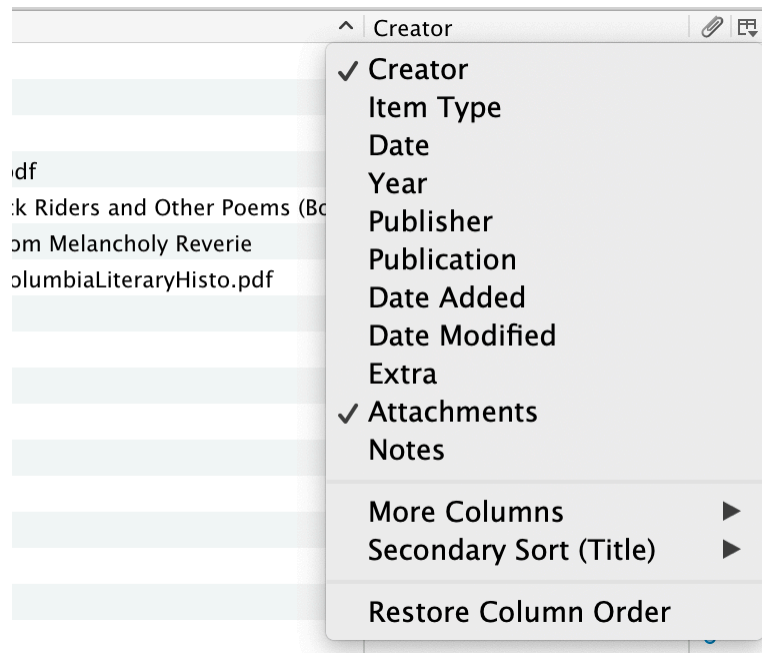


## Toggling ascending and descending sorts

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".