

Zotero Basics

IAP 2014

Creating Collections

1. Open Zotero by clicking the Zotero button in the lower right corner of your web browser.
2. If you have just installed Zotero, you will see the default folder of My Library. To create new folders to store your references, click the new collection icon.



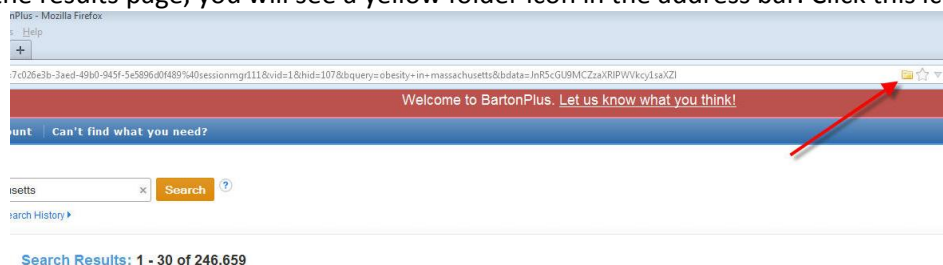
3. To create a sub-collection, right click on the collection and select New Subcollection.
4. Import items directly into a collection by selecting the folder before saving the citation, or drag items from the My Library folder to a more specific folder.
5. Click on My Library to see everything in your Zotero library.

Notes:

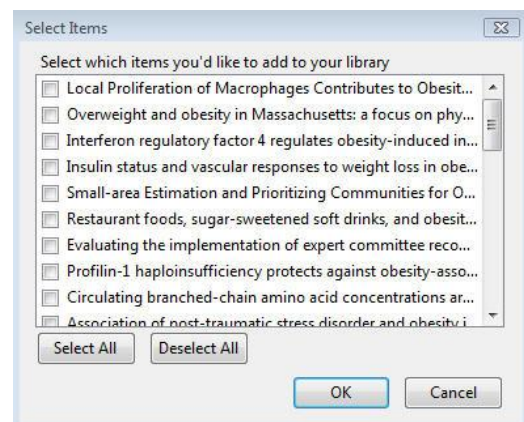
- An item can be in multiple collections.
- If you select an item and then select another item while holding down the shift key, you will select all the items in-between.

Getting Articles and Documents into Zotero

1. Search a database and find an article.
2. On the results page, you will see a yellow folder icon in the address bar. Click this icon.



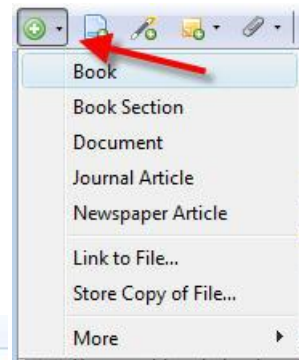
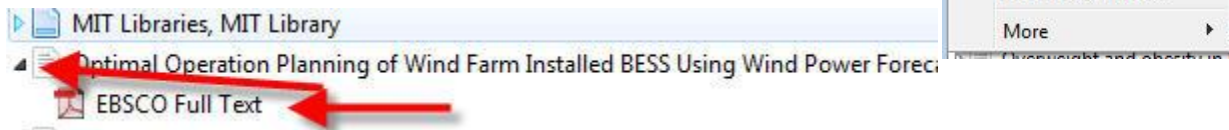
3. All the articles on the page will be displayed in a pop-up box. Check the items you want to save and click Ok. A box will pop up in the bottom right corner to let you know where your items are being saved (in "My Library" or another folder you created).
4. Click on an individual article that has not been imported.



5. In the address bar, the icon changes to a gray paper because this is just one article, not a list. The icon will change depending on the type of document (iPod icon for music, people icon for conference paper, etc.) Click on the icon to save the document.
6. To manually add an item, click on the “Add new item” icon, choose the type of item, and type in the information.

Notes:

- With Zotero, you don’t have to look for the export button in each database; it’s always in the same place.
- Zotero will often save full text documents. Clicking the arrow next to the document title will reveal any saved files.



Cite References in your Paper and Create a Bibliography

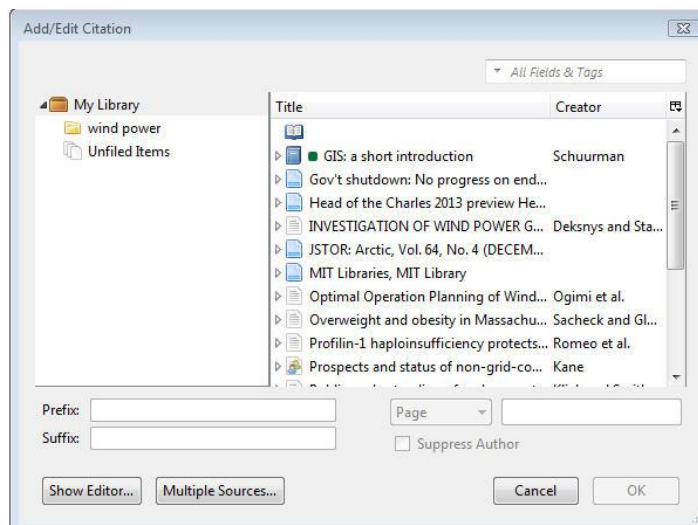
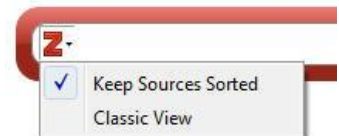
1. Open Microsoft Word and type your paper. (It also works with Open Office)
2. When you want to add a citation, go to the Add-Ins tab and look for the Zotero icons.




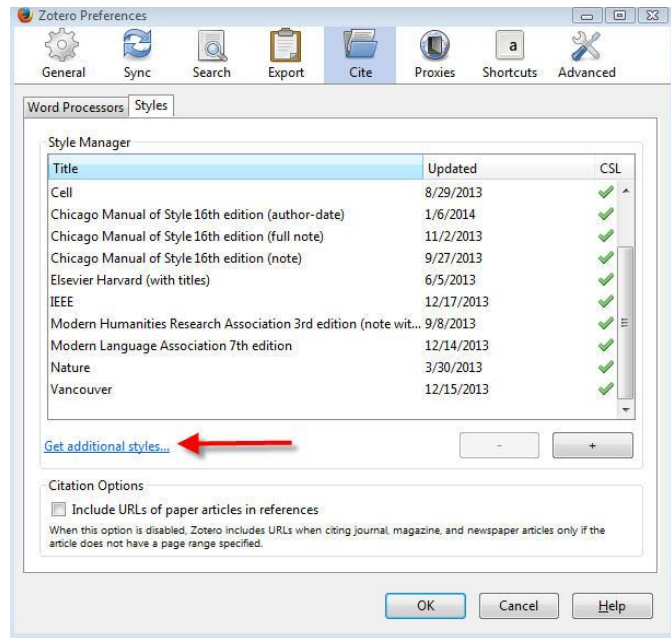
3. Click on the first icon () to insert a citation from your Zotero library. The Z bar will open (you may be asked to choose your citation style first).






4. Search for a document by keyword by typing into the box, or click the “Z” and select classic view to see a list of your documents.
5. Select a citation and click Ok. The citation will be inserted.



- To change the citation style, click the document preferences icon (). If you do not see your preferred citation style, you can add more to the list by opening Zotero in your browser, clicking the Actions icon (gear) > Preferences > Cite > Styles Tab and clicking Get additional styles. You can choose from hundreds of styles to install.

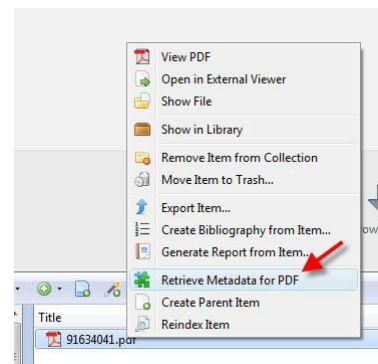


- To create a bibliography, move your cursor to where you would like the bibliography inserted, and click the Insert Bibliography button ().
- To remove a document from the bibliography, delete it and hit the Refresh icon (). All references to it will also be deleted.
- To create a list of citations without citing the records first, drag them from the Zotero window in your internet browser into the paper or select the citations in the Zotero window, right click and select "create bibliography" and paste into Word.
- If you are sending your paper to someone else, consider removing the codes (). Zotero inserts codes into Word so the citations can be updated and refreshed. Removing the codes enables someone to view the document if they are using different citation management software.

Organize Papers


PDFs (and other files) can be dragged from your computer folders to your Zotero library.

- Open Firefox and Zotero and click on a Zotero folder.
- Drag and drop a PDF into the middle (Title) Zotero panel.
- Right click on it and select "Retrieve metadata for PDF." Metadata may be imported. If not, you can add it manually by right clicking and selecting "Create parent item".



Create a Zotero Profile

Create a profile on Zotero.org to:

- Back-up your collection on the Zotero server (you get 100MB for free and can purchase additional storage).
- View your library from different computers
- Share your citations with a group. You can create a group using the people icon () in Zotero.
- Save searches and add results to your personal library automatically. Right click on My Library in Zotero and select “New Saved Search”. The search will create a folder and update it when new items are added to your library that match the search criteria. This is a useful way to see when someone in your group added a new item.

Editing Preferences

Click on the actions icon in Zotero () and Preferences. Some things you might want to change:

- General Tab:
 - Uncheck “Use Zotero for downloaded Bib TeX/RIS/Refer files” if you want to download these files and not open them in Zotero. Otherwise Zotero will automatically open them.
 - Check “Automatically attach associated PDFs and other files when saving items”
- Sync Tab:
 - Enter your Zotero account information (or click “Create Account” if you don’t have one.)
 - Check your preferred sync options to your online Zotero account.
- Search Tab:
 - Make sure PDF indexing software is installed and up-to-date, which helps with searching within PDFs.
- Export:
 - Set an export format for exporting references to another program.
- Cite:
 - Install the Microsoft Word add-in
 - Click the Styles Tab to install more citation styles
- Proxies:
 - Zotero may automatically add libproxy.mit.edu to the beginning of MIT web addresses. This can be useful when accessing MIT resources from off campus, but could cause errors when you are on campus.
 - Uncheck the boxes and delete the proxies to remove them.
- Advanced:
 - If you work from off-campus a lot, enter the resolver: http://owens.mit.edu/sfx_local (version .1) to make it easier for Zotero to access MIT resources.
 - On the Files and Folder tab, change the Data Directory Location to save your Zotero files to a specific location.