Getting Started with Zotero
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Description:

Zotero is a bibliographic management software that works with your web browser to capture metadata. It is designed to collect a variety of primary and secondary research sources ("items") together, allowing the user to organize and take notes on them for later use. You can sort your items into folders, subordinate folders to other folders, and organize the folders into a library. You can assign tags to your items so that you can find them later. Items can be imported from a variety of online sources, including library catalogs, JSTOR / research databases, Google Books, Amazon, newspaper websites, or other informational websites. You can also add items manually and choose from a wide array of source types (book, article, unpublished manuscript, interview, government report, radio broadcast, podcast, etc.). For each of these, Zotero captures key metadata that will help you cite the source later.

Zotero is best used to organize an array of source materials for research. It can be used for short or long-term research projects; it is easy and intuitive, making it ideal for student use. You can export bibliographic entries to MS Word or other platforms, or you can create bibliographies directly from Zotero. You can sign up for a free account online and sync your data across your devices, so that it's retrievable from multiple computers and the web.

Zotero is an open source software, developed and maintained by the Center for History and New Media at George Mason University. Find more about Zotero online: https://www.zotero.org/.

How to get started:

There are two downloads required to get Zotero up and running on your computer (both are free). Download the program that's compatible with your OS (i.e. Mac, Windows, Linux) AND download the browser connector for your preferred browser (Chrome, Firefox, Safari, Opera). At this time, Zotero will not work with MS Internet Explorer.

More tutorials, extended guides, and support forums can be found at the Zotero Support website.

1. Open the program and create the primary-level folders to organize your research. These are called "collections." You can right-click a collection and create sub-folders, or sub-collections.

2. Navigate to the information you want to save in your collection. I recommend using WorldCat for searching library materials. An icon will appear next to the URL search bar in your browser that corresponds to the material you're viewing (i.e. if you're looking at a book, you'll see a little book next to the search bar). You'll notice that the icon will change if you're looking at an article vs. a book vs. a website, etc.

3. Click on that icon to import the metadata into your Zotero collection. Zotero grabs the information you'll need to create a bibliography later.

4. Add / revise tags imported with the rest of the metadata. Tags can be viewed under the "Tags" tab in the right-hand record pane. You can also link the item to other items in your library by clicking on the "Related Items" tab in the right-hand record pane.

5. Add a note to your item. Click on the item you want to view to pull up its metadata record in the right-hand pane. Click on the "Notes" tab to add a note. You can add related items or tags to your note at the bottom of the note pane.

6. Add Attachments to your items. You can attach PDFs, website links and snapshots, documents, pictures, audio / video clips, and other media. Attach files with the Add Attachment (paperclip) button in the Zotero toolbar, by right-clicking on an existing item, or by drag-and-dropping. If you're importing something from a research database (i.e. JSTOR) that you have access to, Zotero grabs the article PDF automatically.

7. Export your bibliographic data to a Word document by dragging a single record (or multiple records) out of the Zotero window and into your Word document. You can customize the citation style to fit your needs (MLA, Chicago, APA, etc.; full note or bibliographic entry, etc.). Change your citation preferences by clicking on the Gear icon > Preferences > Export > Default Output Format. There are additional plug-ins available for more word-processing bells and whistles.

Tips:

- When you find an item online you'd like to add to your library, select the destination collection folder in your library first, then go back to your browser and click the import icon.

- Search your Zotero library, collections, or sub-collections using the search bar in the middle of the pane. You can also navigate by browsing or searching tags (at the lower left).

- You can nestle your note on top of your desktop so that you can take notes while reading something from another program (i.e. Google Book, picture, etc.). Choose the "edit note in a separate window" button at the bottom of the note pane.

- You can add an item to multiple collections / folders within your Zotero library by dragging it to the file tree on the left.

- If you've lost an item, search for it in the search pane. To see where you filed it away, click on the item then hold down CTRL. Its corresponding collections will appear highlighted in the left-hand navigation pane.

- Items can also be manually added to your Zotero library by clicking on the green plus sign in the top center of the pane.

- Standalone notes can be created and inserted into collections, or multiple collections. Click the New Standalone Note button in the toolbar to create a note without attaching it to an item. Files can also be added to your library without attaching them to items.

- You can customize the text size and appearance of Zotero and its notes in the preferences area under the Gear icon.

- You can save advanced searches for easy retrieval later.

- Even though you can sync to the Zotero cloud, the developers still recommend backing up your data periodically in the event you need to reinstall the program. Detailed instructions for backing up can be found on the Zotero support website.

- Zotero can also be shared between several users for collaboration through its "groups" function. Read more about Zotero groups here.

Note: This guide is intended for quick reference only and is not a substitute for the more thorough support resources on zotero.org