

Zotero Tips & Tricks

What's Zotero?

Zotero (Zotero.org) is a free, easy-to-use program for collecting and managing research sources in a personal online library. It offers web browser integration, one-click saving for many items, handy citation tools, and group libraries to share sources with colleagues.

Getting Started

1. Go to www.zotero.org to register for your free Zotero account, download the desktop app, and add the Zotero Connector for your browser. You can find instructions on the set-up process at www.zotero.org/support. Also see the Libraries' handout on getting started with Zotero at library.si.edu/research/Zotero.
2. As of March 2021, the Smithsonian has an institutional subscription for Zotero, so if you **add your SI email address** to your Zotero account, you have access to unlimited cloud storage on the Zotero servers.

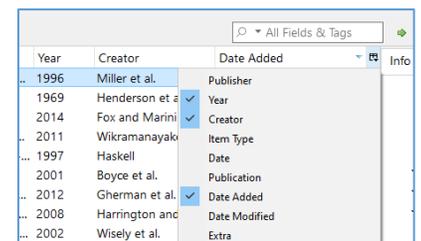
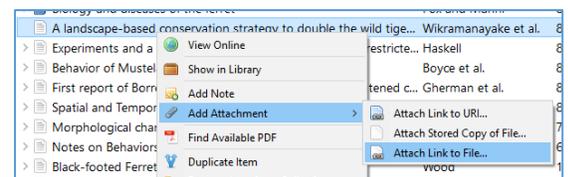
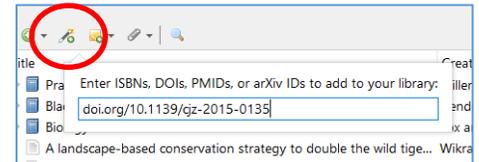
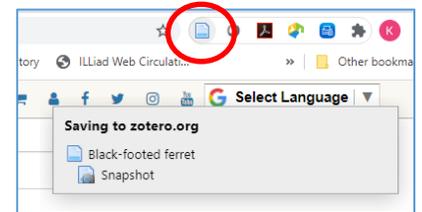
Tips on Saving Items into Your Zotero Library

- If you are not using your personal computer with the Zotero desktop app, you still can **save items to your web library via the Zotero Connector** browser extension (available for Chrome, Edge, Firefox, and Safari). Login to your browser account and the Zotero Connector will enable one-click saving via the Save icon in the browser bar, directing the saved item to your web library at Zotero.org.
- Quickly **save items to your Zotero library using unique identifiers** like ISBNs, DOIs, PMIDs, and arXiv IDs. Click on the “magic wand” icon, then enter the identifier. Zotero will automatically create an item record capturing bibliographic metadata and attachments like PDFs, if available.
- **Save storage space** for your Zotero account by connecting Zotero records to files saved elsewhere, like on your computer or in cloud storage like Dropbox or OneDrive. Right-click on the item record in your Zotero library → Add Attachment → Attach Link to File. Then find the stored file to create the link.
- **Add html tags <i> and </i>** in fields to ensure that terms like species names, ship names, film titles, etc. appear italicized in your citations and bibliographies.

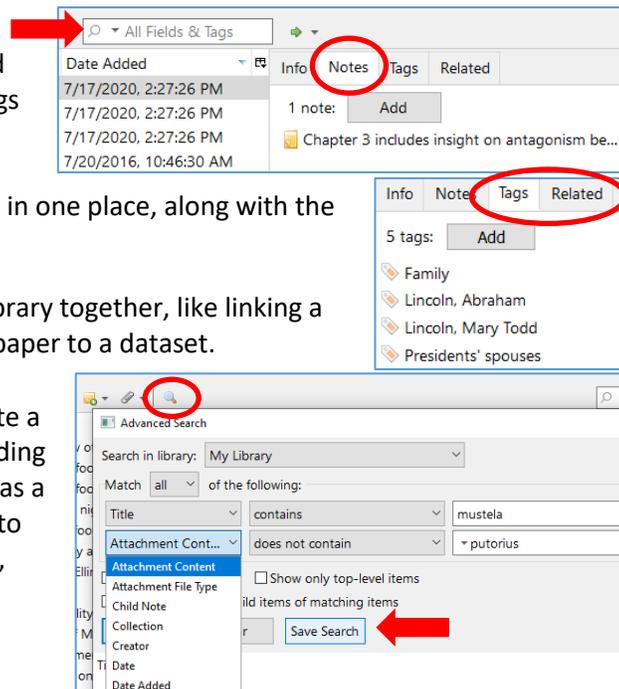
Tips for Organizing Your Zotero Library

Zotero offers a variety of ways to customize your library to make things findable.

- **Create collections and sub-collections** (folders and sub-folders) in the left side column to arrange item records in a way that makes sense to you – by subject, by project name, by chapter number, etc. You can create as many collections/sub-collections as you want.
- **Choose what appears in the center column** by clicking the grid icon and selecting the fields that you find useful. Expand the columns to make them wider or click and drag column headings into your preferred order.



- **Add Notes and Tags** to provide more detail or context for items in your library. Some items saved from e-journals and databases may provide automatic Tags, like subject headings or keywords. All Notes and Tags are searchable from the **Zotero search box**. Some researchers take all their notes in the Zotero Notes field so they all are stored and searchable in one place, along with the bibliographic info for an item.
- The **Related tab** allows you to link 2 items in your Zotero library together, like linking a book citation to a review of the book or linking a scientific paper to a dataset.
- The **Advanced Search** “magnifying glass” icon lets you create a multi-faceted search on nearly any field/s in a record, including attachments. You can save the search, which then appears as a new collection in your Zotero library. If you add new items to your library that match the parameters of the saved search, they will appear in that Saved Search collection folder.

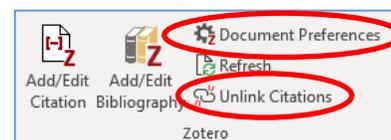
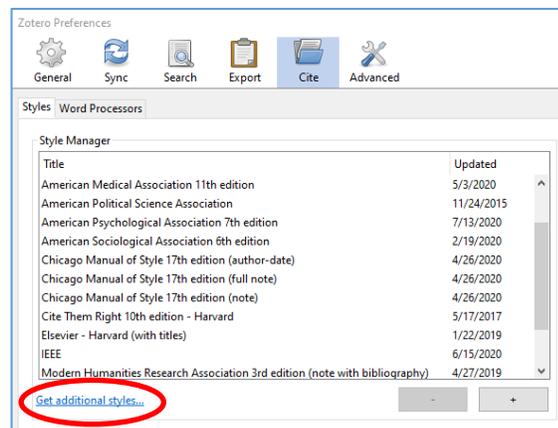


Tips on Citing While You're Writing

When the Zotero software is downloaded, plug-ins for word processors MS Word, Google Docs, and/or LibreOffice are simultaneously installed. However, the plug-in **does not work** with the web version of Word in Office 365. You must have a desktop version of Word downloaded on your computer to use the plug-in. If you have any problems with the word processor plug-ins, see:

www.zotero.org/support/word_processor_plugin_installation

- **Create quick citations or bibliographies** by highlighting one or more items, or an entire collection in your Zotero library, then right-clicking and selecting “Create Bibliography from Item/s.” This creates quick citation/s that you can paste in a document.
- The word processor plug-in automatically includes some of the most commonly used citation styles. You can add more styles via the **Zotero Style Repository** at www.zotero.org/styles.
- You can quickly change the citation style used in a document by choosing **Document Preferences** via the plug-in tools, then selecting a new citation style. The plug-in will automatically update your citations to the new style.
- Once you have a final draft of your own document, you may want to **unlink citations**. This removes Zotero coding so future changes to items in your Zotero library will not affect your document. However, that unlinking is **irreversible!** Best practice would be to save both a linked and unlinked version of your document, just in case you need to make changes to the document later.



More Information

- Zotero Documentation/Support: www.zotero.org/support
- Zotero Forums – a great place to get help/answers: forums.zotero.org/discussions
- Zotero information page: library.si.edu/research/zotero (includes links to class handouts)
- Still have questions? Contact Ask a Librarian by email at Askalibrarian@si.edu