



Advanced Citation & PDF Management with Zotero

Activity 3: Using Tags & “Related” Items

In this exercise, you will:

- Add your first tags to Zotero
- Filter articles by tags
- Delete Automatic Tags
- Link one article with another

Terms you will need to know for this exercise:

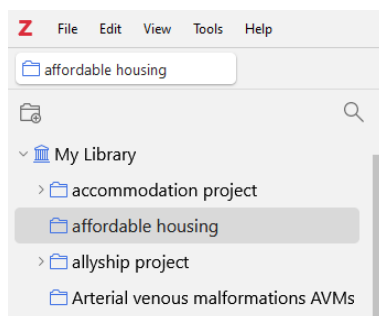
1. **Collection:** These are the folders you create on the left-hand side of the screen. Your primary collection is “My Library”

2. **Item:** an item exists, ideally, as part of a citation. A note is an item. A PDF is an item. A web snapshot is an item.

You can tag **citations** and **items** separately; thus, you can tag a PDF attached to a citation separately from the citation itself.

3. **My Library:** My library is where ALL your citations/items live. The only place to see all your tags in one place is “My Library”

4. **Tag Selector:** the window that shows all of your tags.



Using Tags

Tags are a way of adding special keywords to **items** in your **collections** so you can “filter” your library by these tags. Think of tags as giving you ultimate naming power.

Tags are defined at the “Collection” (or folder) level. However, “My Library” contains ALL of your tags. That means each folder you see under “My Library” will have different sets of tags, while “My Library” will show all your tags in the Tag Viewer.

For example, I might want to tag an article “five star” to indicate that I think it’s top-notch research compared to other articles I’ve read.

Or, I might tag an article “to read” to indicate that I want to come back and read this article later. (I could also create a folder or “collection” in Zotero terminology called “to read”)

Or, I might have a specific way of describing something in my research that makes sense to me or my scholarly community. For example, I use the term “trauma informed research” in my discipline, but other disciplines might use a different (but meaning the same thing) term.

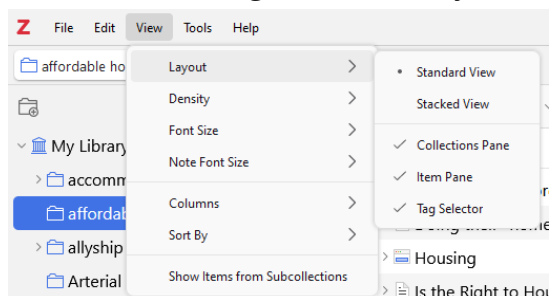
Tags allow you to assign important keywords to items no matter how they’ve been defined elsewhere.

There are two types of tags

1. The first type of tags are tags that you create.
2. The second type of tags are tags that are pre-defined in the metadata of a citation. You might notice that there are already tags in your library without an effort on your part.

Turn on the Tag Selector

In order to see “tags,” make sure your “tag selector” is visible.



Go to “View” → Layout → and make sure “Tag Selector” is checked.

You should now see a box in the bottom, left-hand corner of your screen containing all the tags for the “collection” you are currently viewing. Here, I've clicked on the tag, “Affordable housing.”

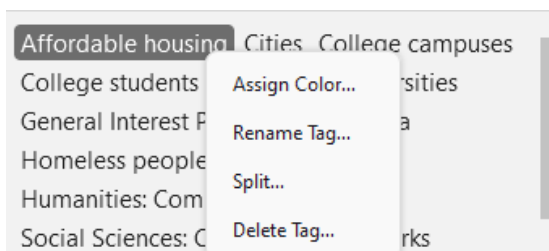


Clicking on this tag will summon all the articles that I've tagged “Affordable housing” (or that have been tagged metadata by the content provider).

By clicking the tag, Zotero will also show me the most common other tags associated with “Affordable housing”.

You'll see that there are many tags in my library.

You can assign a colour, rename, split, or delete a tag by “right clicking” on it in the tag selector.



Add Your First Tag

Add your first tag by clicking on a citation. On the right-hand side, you will see your information pane. Click on the “Tags” tab.

To add a tag, click “add” in the Tag tab. To remove a tag, click the “minus” button.

The screenshot shows a digital library interface. On the left, a list of citations is displayed with columns for 'Title' and 'Creator'. The first citation, 'Doing their "home" work: A case study of University of British Columbia Okanagan student youth rental housing experiences in the city of Kelowna' by 'McEwan and Telesnia', is highlighted. On the right, a 'Tags' pane is open, showing a list of tags such as 'Affordable housing', 'Cities', 'College campuses', 'College students', 'Colleges & universities', 'General Interest Periodicals--Canada', 'Humanities: Comprehensive Works', 'Social Sciences: Comprehensive Works', and 'university students'. A red circle highlights the 'Add' button (a plus sign) at the top of the tag list, and another red circle highlights the 'Minus' button (a minus sign) next to the 'Colleges & universities' tag.

Actions

1. Add a tag to one of your citations now.
2. Add the same tag to another citation in your collection.
3. Go to your “tag selector” and find the tag you just made. Click it.

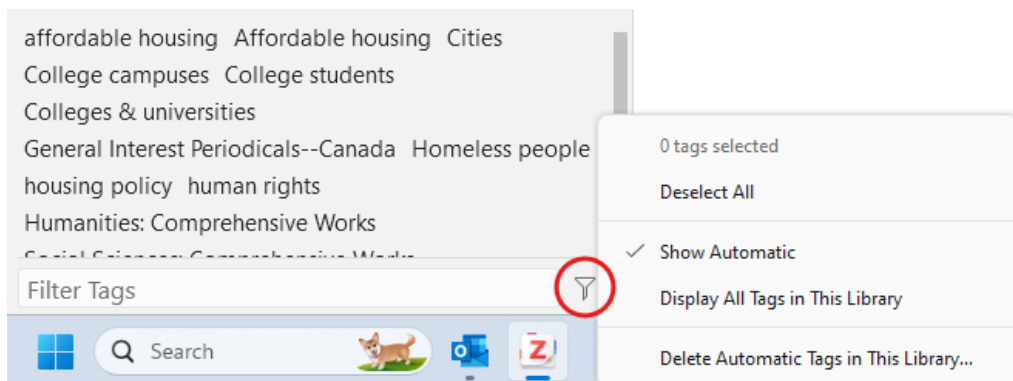
How many articles were returned to you?

Delete Automatic Tags

If you do not want to see “automatic tags” (tags that were not authored by you), you can easily delete them.

Click on the “Filter” icon in the tag selector and then select “Delete Automatic Tags in This Library”.





Related Items

Related items are a way to relate one item directly with another item within the same collection. Why would you relate one item with another?

[Some use cases:](#)

- connect book chapters to their parent volume
- connect book reviews to the book reviewed
- connect different versions of a work (e.g., connecting a conference presentation that eventually became an article that eventually became a book)
- link associated items from different collections
- link items that form parts of a single work (e.g., articles in a series)
- connect standalone notes to the items they discuss
- link one item to another discussed in the Abstract or Notes fields
- link items that have similar comments in the Abstract or Notes fields

To Link a Related Item

1. Click on the "Related" icon below the "Tags" icon in the inspector pane
2. Click on the plus sign to "Add"

3. Search for the item you want to link, highlight it, and click “Select”

The screenshot shows a digital library interface. A search results modal is open, displaying a list of search results. The modal has a search bar at the top, which is highlighted with a red box labeled '3'. Below the search bar, there are columns for 'Title' and 'Creator'. The search results are as follows:

Title	Creator
Applying for Affordable Housing	
Doing their "home" work: A case study of University of British Columbia...	McEwan and Tel...
Housing	
Is the Right to Housing Being Realized in Canada? Learning from the...	Ramage et al.
Is the Right to Housing Being Realized in Canada? Learning from the Experiences of Tenants in Affordable Housing Units in a Large Canadian City	

At the bottom of the modal, there are two buttons: 'Select' and 'Cancel'. The 'Select' button is highlighted with a red box labeled '1'. To the right of the modal, there is a link that says '0 Related', which is highlighted with a red box labeled '2'. The background shows a sidebar with a list of folders under 'My Library' and a main area with a list of items.