Organizing PDFs with Zotero

Hi my name is Gerard Collins and today I'm going to show you how to use Zotero to manage PDFs. So what is Zotero? Zotero is a citation management application. It's available as a free download for Windows, Mac, and Linux at Zotero.org. This is their website here. As they describe it, it's "a free, easy-to-use tool to help you collect, organize, cite, and share your research sources."

After you download and install the software, it's going to look a lot like this. A window with three panes, on the left it shows your library or libraries, the center is where citations are listed once they're in place, and on the right is where the citation detail and metadata will be displayed.

So, the easiest way that you can add PDFs is to open a folder, select everything, and just drag it over.

There you go.

You can leave it at that, but that's really all you get to do. You can go in, and if you click on any of these you could rename them, could give it a new title. But that's not much different from what we you could do over here in the folder. That doesn't really make much sense to use Zotero that way.

So what I'm going to do now, I'm going to show you how to take, let's say, this PDF here. We're going to right-click on it and, see here, you have the option to "Create a Parent Item." If we click on that we can see it changed. We've got some more information over here on the side. The filename became the title. And over here, the document even changed a little bit. We have this little triangle. You can see there's a PDF down there. But this parent item here is

basically the citation. it's all the information you need to create a complete and accurate citation. Doing it this way is good. We've now created the parent item, and we have more options here, and we can add more information. But it's not all the metadata we want, right? So I have THE title — well, I have A title. I don't know for sure if that's the correct title or not. I'm also missing the author, I'm missing the publisher, the date, all of that other information. So I can double-click, I can open up the PDF, I can scroll through, I can get that information and enter it by hand, but there's actually another trick that Zotero can do that is really powerful, really useful, and can save you a lot of time. What we have to do first is we have to go up here into the preferences and then you have "General," "Sync," "Search," "Export," "Cite," and "Advanced" — all up here. Click on "Search," and then you'll see here under "PDF Indexing," you have this option, "Check for Installer." It may already be installed, depending on how you do the installation, but if it hasn't, click on it, then click on "Install." This will just take a few seconds. What it's going to do is actually allow Zotero to scour through the PDFs to see if it can find any embedded metadata to create the citation, or if it can it'll find any text in the PDF like a DOI, a digital object identifier, to use to search Google Scholar and get our citation information.

So in this case, let's look at this one, this "10-003.pdf." That doesn't tell me a whole lot. I don't know what that is, or I don't remember what that is or why I downloaded it. So let's do the same thing. We'll right-click again, and if you go down to this option here, "Retrieve Metadata for PDF", click on that. And there you go, "Metadata retrieval complete." We have a title now: "Information literacy: The changing library." OK. We look over here and it says that it's a journal article, we have a title, we have an author, publication, volume, issue. Pages looks a little suspect. I don't think it's 450 pages long, but we can always fix that. Date 2001, short title,

Google Scholar. All right, we have a lot of information. We don't have a DOI, but, you know, maybe there isn't one. This is a good start. This saved us a lot of time of what we would have had to type. And if we double click on it, we can look and see that, yeah, a lot of that seems right. Title is correct, author's name is correct in here, if we see at the bottom here, published February 2001 in the *Journal of Adolescent and Adult Literacy*.

OK, so this looks really good. Saved us a lot of time.

You can do multiple PDFs at once. I recommend doing just a handful. You don't want to do every PDF you have on your drive, because you're still going to have to go in and verify all of the information. That's still your responsibility, to make sure that the information is correct. But if we click here on "Retrieve Metadata for PDFs," and — boom, boom — we've got two more green checks, we've got more information, so now we have information on three of these four items. And this fourth one up here, what I'm going to do — I'm going to show you what we can do here. You can actually just extract that PDF, take it out, don't associate it with that item anymore, and we're going to move the item to the trash. We don't want that anymore. And we're going to do the same thing: retrieve metadata from PDF, and there we go. Filled in all of our information. Looks great. We're off to a great start.

So that alone is actually really useful. You've got your citations all in place, and you've also got PDFs that are your research resources in place as well.

There are a few other things you can do. If you see over here, there's a very small little button on the far right of the center pane. If you click on that, it shows all of the other columns that you can add. There's actually another subset of columns down here. You can add a secondary sort, depending on how you want to sort your information. It can be really, really

useful when you're trying to keep information together or go through dozens, hundreds of PDFs that you might accrue over time.

Now, let's say I want to put in the year here. That gives us a way to sort it. That's great, and this will work when you have four PDFs. But, like I said, when you have dozens or hundreds— Or what if I have different projects that I'm working on, and I'm trying to make sure that I've got everything collected in one place?

So over here, you'll see there's a little button up here, and it says "New Collection…" So you click on that, it gives you a little menu option to enter a name for this collection. So let's say that I collected this information for my INFO 200 class. OK. So that opens up another little folder over here. It's empty, but if I go back to my library, let's say that three of these were for INFO 200. OK? Click on those, drag them over, drop them on "INFO 200," and just those three items are in that folder. It helps to concentrate, especially when you've got, like I said, dozens or hundreds of PDFS, to have just the ones you need for a particular project. You can click on the collection, you can see exactly what you need.

Let's say I had another class I was taking. INFO 254. OK? Same thing. I can go back into the library, I can select the same items, I could select different ones, I could select two instead of three, if I drag them over into "INFO 254," click on "INFO 254," you can see it's just those two items. Back in the library, the same number of items. So what you're doing with these collections, they're acting kind of like playlists in iTunes. It's letting you kind of create an organization for the records, but the records themselves are all staying the same at the top of your library. This just allows you mix and match in ways that make it convenient for you without having to make multiple copies and store them across multiple folders.

And one other thing that you can do that is a handy little tip: If you go down here, some of these, you know, you've got the titles that are the same, others are not. "Information literacy: The changing library," that was that "10-003.pdf." If I ever decide I want to take these PDFs out of Zotero, I'd really like to have some idea of what they are. I mean, yes Zotero is going to keep a lot of this information organized, but sometimes you want that human-readable filename. Here's another trick you can do: Right-click on the PDF, and then you have a new menu option here, "Rename File from Parent Metadata." Click on that, and here you go. You get the author's name, dash, year, dash, title. Makes it much more recognizable and useful if I ever decide to export that than "10-003.pdf."

So that gives you a quick idea of how to use Zotero to get a handle on your PDFs while doing your research. Once more, it's a free program, so you can always download it, you can try it, and learn all sorts of tricks that you can do to make your research easier and more organized.

Thanks!