Zotero Reference Importing, Entering, and Managing Guide

1. Install Zotero

- Visit the Zotero website: https://www.zotero.org/

- Download and install Zotero according to your operating system.

- Install the Zotero Connector extension for your web browser to add references directly from the web.

2. Create a Zotero Account (Optional)

- An account allows you to sync your library across multiple devices.

- After registering, log in to the Zotero application and configure the synchronization options.

3. Import References from Databases or Academic Websites

- Open your preferred academic database (such as JSTOR, PubMed, Google Scholar, etc.).

- Add Zotero Connector for your explorer: https://www.zotero.org/download/connectors

- Use the Zotero Connector to add individual articles or entire search results to your Zotero library.
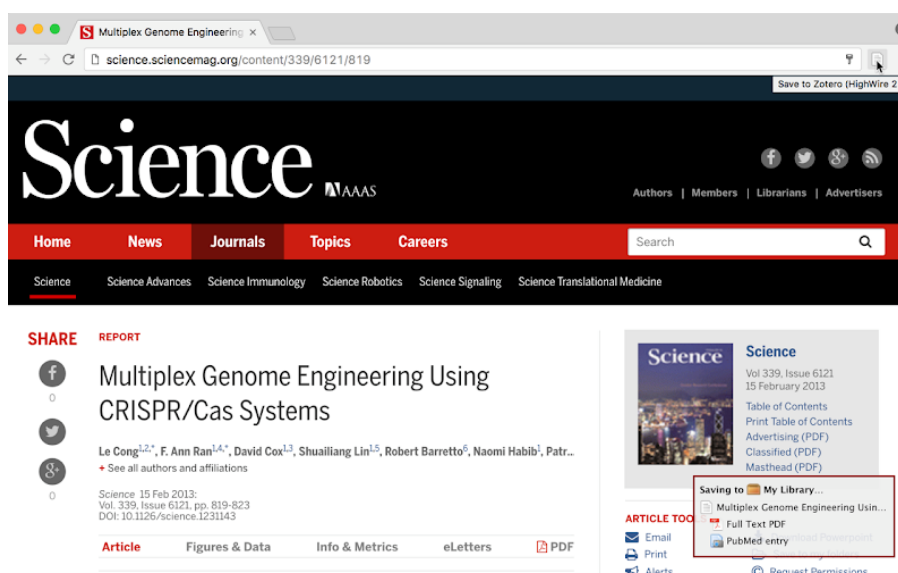
- Confirm the imported details, ensuring to adhere to specific formatting guidelines:

(1) Use full first and last names for all authors. If only initials are available, conduct a brief search to find the complete names (e.g., not S. Smith but Sarah Smith).

(2) For the title of the paper, only capitalize the first letter of each word (e.g., "Addressing spatial autocorrelation in space-time statistical models: a case study in southeastern Ghana").

(3) Zotero typically recognizes the document type accurately, but if it is incorrect, you can manually change it.
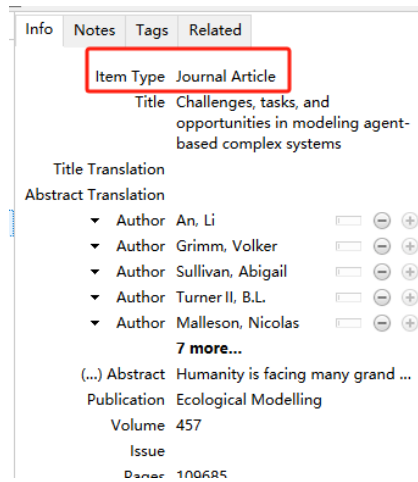

Here is an example: suppose someone recommends a paper as follows: Wijermans, N., Scholz, G., Chappin, É., Heppenstall, A., Filatova, T., Polhill, J. G., ... & Stöppler, F. (2023). Agent decision-making: The Elephant in the Room-Enabling the justification of decision model fit in social-ecological models. Environmental Modelling & Software, 170, 105850. Then search the paper on Google under the title "Agent decision-making: … models", you may get a page like this one:
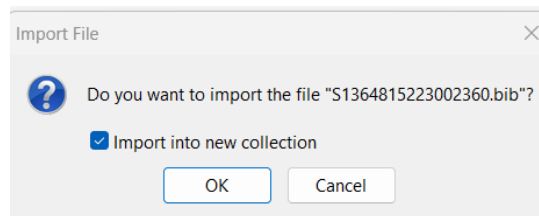
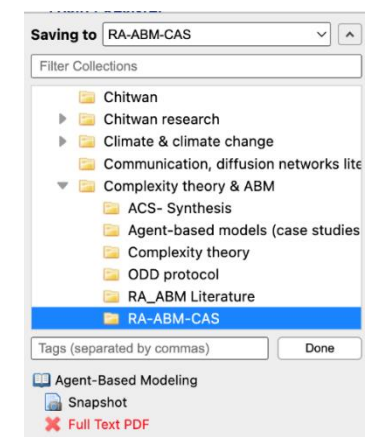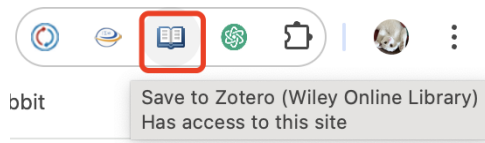Option 1: Then you can click on Cite and get the following:
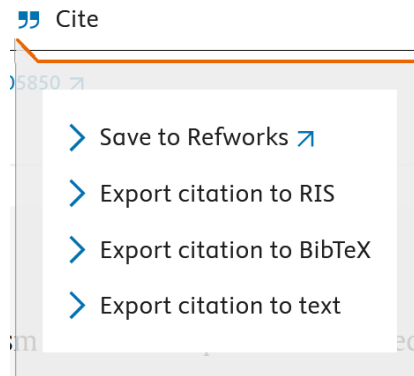
Then choose Export citation to BibTex (RIS may work as well). Then click on the one that pops up as (assume your Zotero is open):
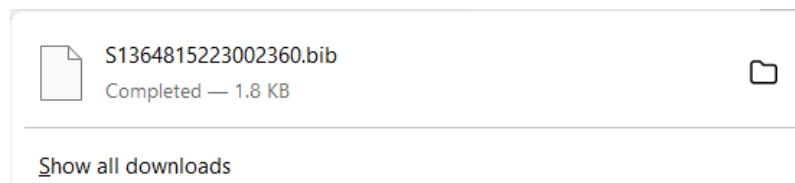
Then you will see a window comes out as the one below. Simply choose OK:


Option 2: You click Zotero Connector button

Then choose a folder and click "Done".

Then the paper is imported to Zotero under a folder named "S1364815223002360". Next, drag the paper "Agent decision…models" to an appropriate folder, e.g., Complexity theory & ABM/ Agent-based models (case studies)/ and delete the folder named "S1364815223002360".

Finally go to the refence in Zotero and you will see it as shown on the right. All authors have full first names such as Nanda and Geeske. In this case, this reference is complete, and we can stop. However, sometimes when you import a reference, the authors are listed like Wijermans, N, and Scholz, G. (first name is replaced by the first initial letter), then search online and find the full first names and enter them in the right places (e.g., use Nanda to replace N.).

If the names are in upper case (e.g., CHAPPIN, EMILE), then manually change them to first letter capitalized only (e.g., Chappin, Emile).
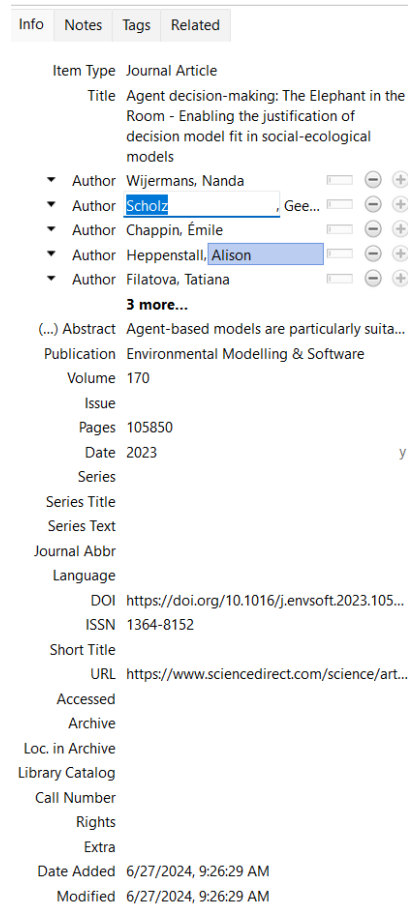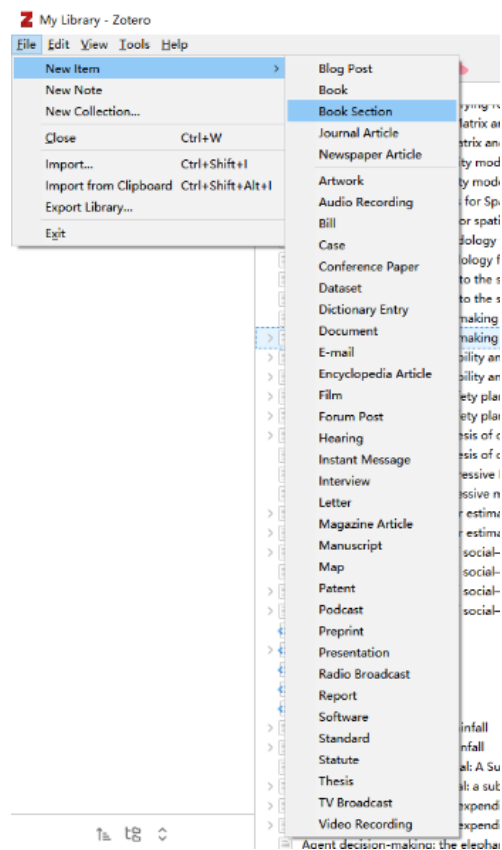

4. Import PDF Files

- Drag and drop PDF files into the Zotero window; Zotero will attempt to automatically recognize document details.

- If Zotero cannot recognize the document, you can manually enter the details of the literature.

    Here is an example:

- 1. In the Zotero library window, go to "File → New Item" and choose correct type (e.g., Book, Journal Article, Conference Paper, etc.).

2. Type (or copy and paste) article title
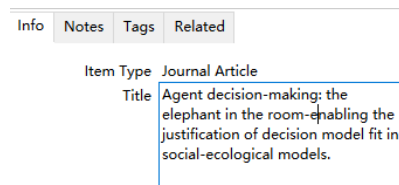
3. Include the following information as necessary: author (same as the previous example), date, abstract, publication, volume, issue, DOI, etc.

4. Zotero automatically saves your changes as you enter the information. There is no separate "Save" button for individual entries.

5. If you have a PDF or other file associated with the reference, you can attach it by dragging the file into the item entry or by right-clicking on the item and selecting "Add Attachment" → "Attach Stored Copy of File."
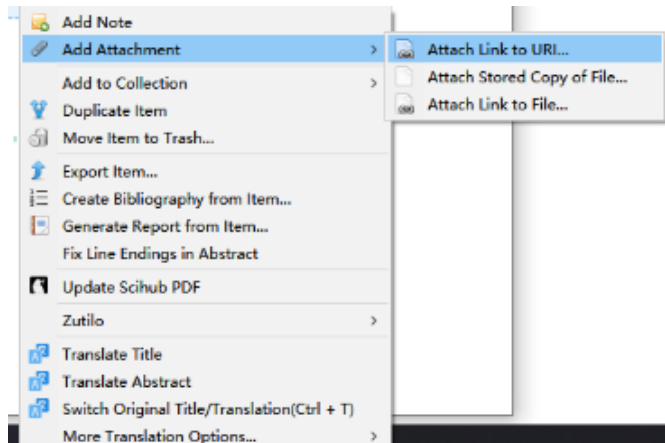
5. Import Using ISBN or DOI

- In Zotero, select "Add Item by Identifier".

- Enter the ISBN for books or the DOI for articles.

- Zotero will automatically fill in all relevant metadata.

6. Organize Your Library

- Create collections and sub-collections to manage different research projects or topics.

- Use tags to categorize literature for easy searching and referencing.

7. Integrate Zotero with Word Processors

- Install the Zotero plugin in Word or LibreOffice.

- Use the plugin to insert citations and generate reference lists in your documents.

8. Sync and Backup

- Enable synchronization in Zotero settings to ensure your library is up-to-date across devices.

- Regularly check the sync status to ensure all changes are uploaded.