

Zotero is an open-source literature management software. It allows collecting and organising items, reading and connecting publications, as well as creating citations and bibliographies while you write. The free desktop installation is fully operable without restrictions. Create an account using your institutional email address for unlimited cloud storage.

Contact & help desk

In person
Phone
Email
Web

At the information desks in Birmensdorf, Dübendorf, and Villigen
+41 58 765 57 00
info@lib4ri.ch
www.lib4ri.ch

First steps

Installation

Retrieving Zotero from your local institutional software repository guarantees a flawless and safe installation. Alternatively, you can download it from the official website [Zotero.org](https://www.zotero.org).

Tip:

“Literature management with Zotero” is part of the Lib4RI training series. Find more information on our website under > [Learn](#) > [Trainings](#).

The **main installation (library)** is available for Windows, Mac and Linux distributions. Mobile versions are available for iOS and Android. The **word processor plugin (cite-while-you-write)** is available for MS Word and LibreOffice. It comes automatically with the main installation. The **browser connector (download items)** is available for Chrome, Edge, Firefox and Safari. If it is not included in your institutional installation package, you can download it directly from [Zotero.org](https://www.zotero.org).

Support and troubleshooting

The [Zotero documentation](#) offers a comprehensive guide of the software and valuable tips. In the [official forums](#) you find help for specific problems.

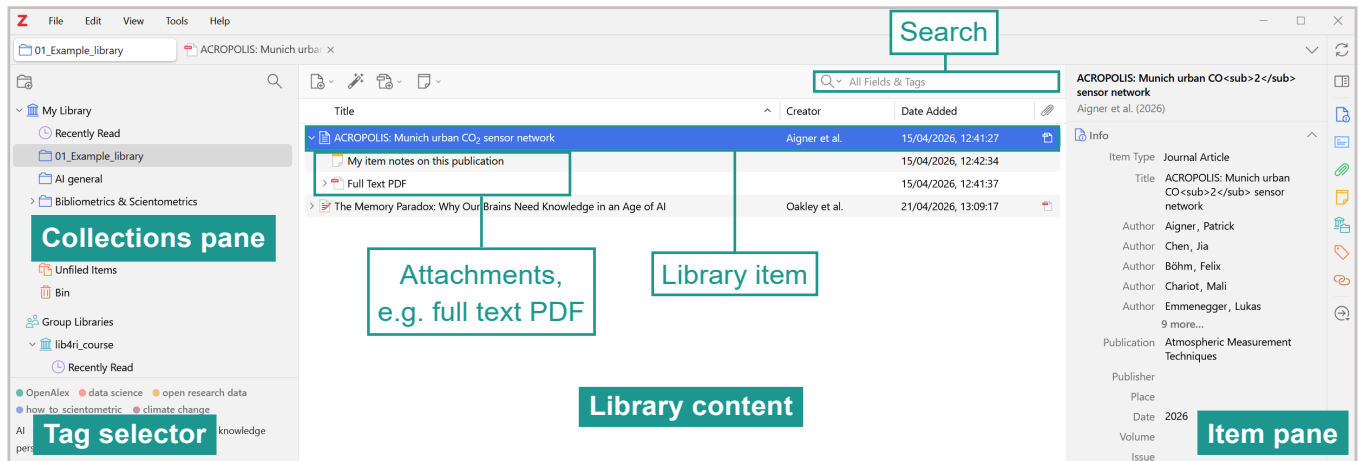
Version

This Info Sheet is based on Zotero 9.0 (May 2026).

Local library interface

Organising your library

All library items are always stored in *My Library*. To organise your library, assign items to collections, e.g. based on topics or projects. Copy items to other collections with drag & drop. To move items, hold Shift (Win/Linux) or cmd (Mac).



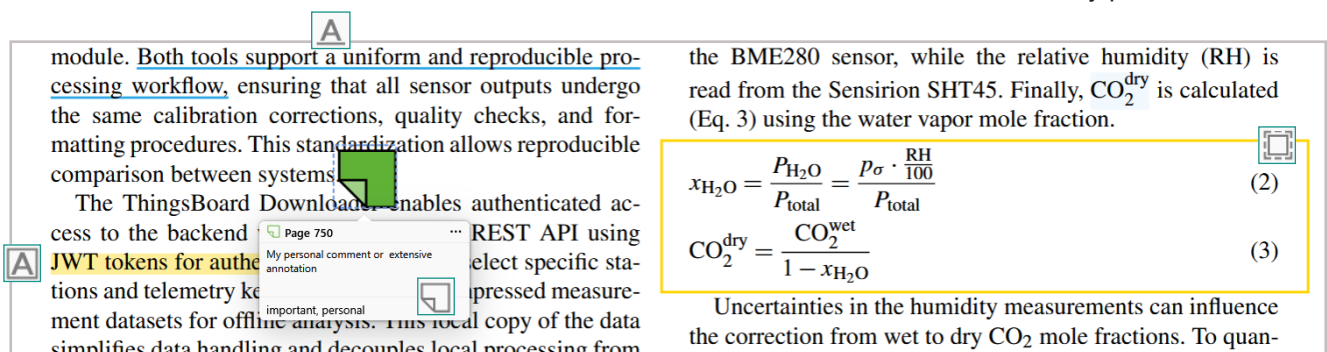
Finding items

The quick search allows to quickly look up items. Expand the dropdown menu to specify where to search. There you can also open the advanced search dialog to make more complex search queries. Results of the advanced search can be saved and handled just like regular collections.

The library can also be filtered using the tag selector. Define tags as you need for items, notes or highlights. To prioritise a tag, right-click it in the tag selector and assign a colour. Up to nine tags can be prioritised.

Document reader

Zotero has an integrated PDF reader where you can annotate and highlight parts of your documents. Use the *Select area* tool for screenshot-like annotations, e.g. of graphs, formulas or tables. All markups and notes are visible as attachment to the PDF in the library pane.



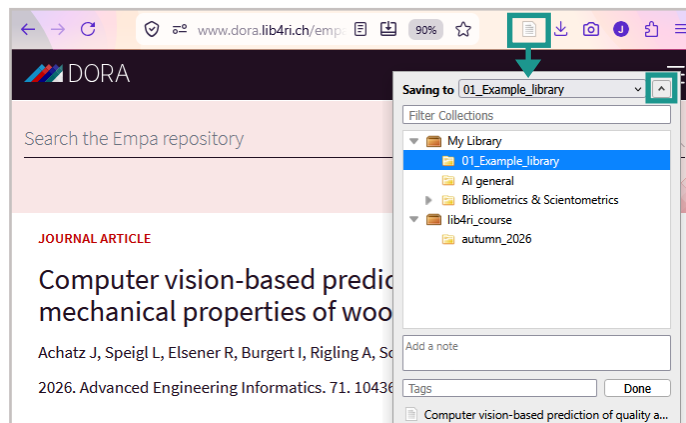
Example uses a screenshot from Aigner et al., 2026: ACROPOLIS: Munich urban CO2 sensor network, published under CC-BY 4.0.

To structure your notes for one or across many documents, open a new Word document and include them via *Add note* or *Add annotation* in the Zotero tab. All notes are referenced, so you can easily find them again. You can add your note document via drag & drop to your Zotero library, e.g. into a collection *My notes*.

Importing items

From the web



The browser plugin automatically scans the websites visited for elements with bibliographic metadata. Any such element can be imported with one click. The appearance of the Zotero button indicates the item type, e.g. article, book or website. New items are saved to *My Library* by default. In the extended menu, you can assign the item directly to a specific collection.



Retrieving full text

Zotero will also try to retrieve the full text PDF. However, some sites block the automatic retrieval, even if the text is published Open Access. In this case, download the PDF alone and add it to your library via drag&drop. Zotero will extract the metadata from the PDF and create a new item from it. You can also drag the PDF directly to an existing item to attach it.

Further import options

Under *File > Import* you can load existing libraries from other literature manager software or *.bib files. The import wizard  can find and import items based on identifiers such as DOI or arXiv ID. Alternatively, you can add items fully by hand .

Working online

Your web library

Employees of the four research institutes are eligible for unlimited cloud storage. Register a new account with your institutional email address or add it to your existing account at [Zotero.org](https://www.zotero.org) and connect it with your local installation via *Edit > Settings > Sync*.

The Zotero cloud is hosted on a server in the U.S. You are not allowed to upload any confidential data to the cloud! See your institutional Directive on Cloud Use for more information or contact us via email at info@lib4ri.ch.

Group libraries

To share a collection with your direct colleagues or collaborators, create a group library on [Zotero.org/groups](https://www.zotero.org/groups). Make sure to set privacy settings of any group to “Private” or “Public Closed” and make sure only members have reading access. For copyright reasons you are not allowed to share full texts in a public open library. You can invite or allow eligible peers to your private and closed group libraries. Requests will reach you via email.

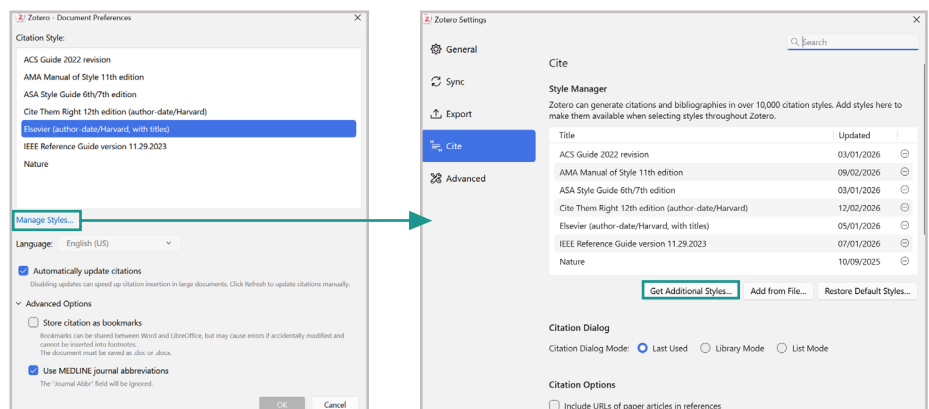
Citing and referencing

Zotero in your word processor

In MS Word, LibreOffice and Google Docs, Zotero will appear as new tab or menu entry. You can also use it with Quarto in RStudio and Positron. For using Zotero with LaTeX, export your library as *.bib file. If you have an Overleaf premium account, you can link it with your local Zotero installation.

Setting up citations

When inserting the first citation, you can choose a citation style for this document. You can change the style at any time under “Document Preferences”. If the style of your specific target journal is not available in the default list, check whether you can find it in the repository. Mind the date when the style was last updated!

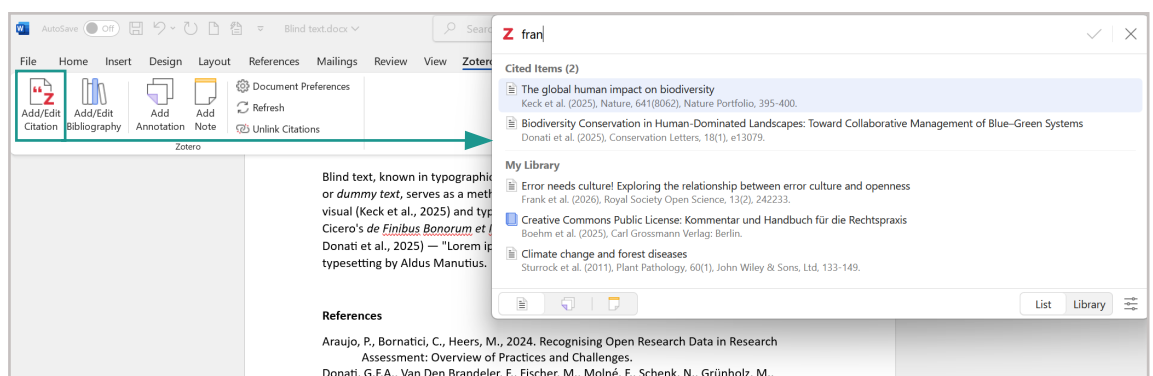


Tip:

If the citation dialogue does not pop up, it might already be open, but hidden behind another window. Check your taskbar with the Zotero icon.

Click “Add/Edit Citation” to open the citation dialogue. The citation will be placed on the current position of your cursor. You can always edit citations, e.g. to add or remove references.

After inserting a first citation, you can add the bibliography. It is updated automatically during writing. For submission, create a copy of the final manuscript and unlink all citations to get a flat file without field codes.



Collaborative writing

It is not required that you and your co-authors share the same library for collaborative writing, but doing so can make the process much easier. However, all authors must use the same software. Using different software in one document, e.g. Zotero and EndNote, will cause problems.