# Citavi

Citavi is a reference management program in which you can manage and organize literature sources, citations, tasks, and full texts. You can choose from different citation styles and customize them or create your own. It is possible to easily import bibliographic data from databases, catalogues and websites via Object Identifiers, various download formats or the Citavi Picker. In addition, citations and source references can be transferred directly into Word and the program takes over the creation of the bibliography of the resources used automatically.

## Installation

You can download Citavi from the Citavi website. With installation the Word Add-In is installed, it is also recommended to install the Citavi Picker for the web browser. To use the program a user account with an associated license is required. You can create your own user account (preferably with your university email address) and get a license from the URZ. Information can be found at the Website of the URZ under Softwarebeschaffung/ -ausgabe: Citavi.
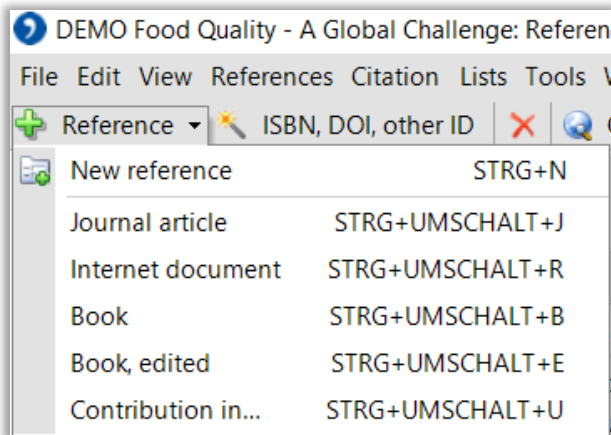
## How Citavi works
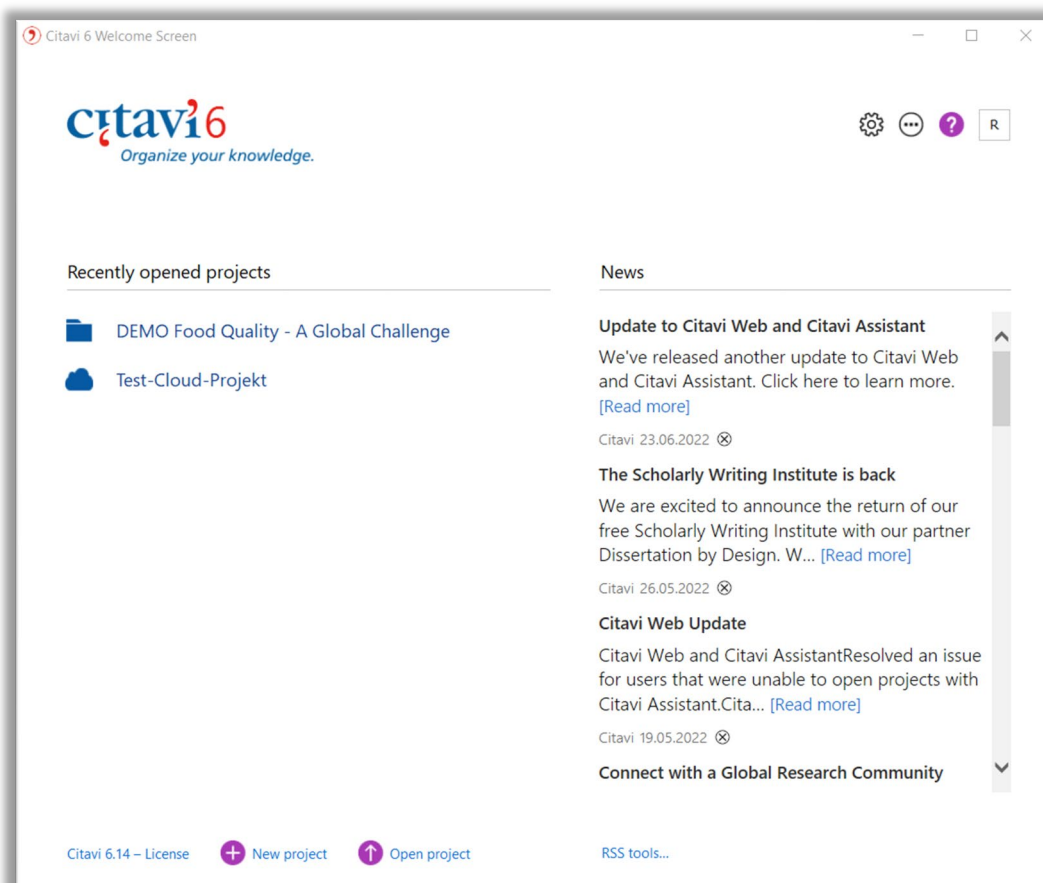


In the welcome screen you can open existing and new projects, the cloud sign stands for a cloud based, the folder for a locally stored project.
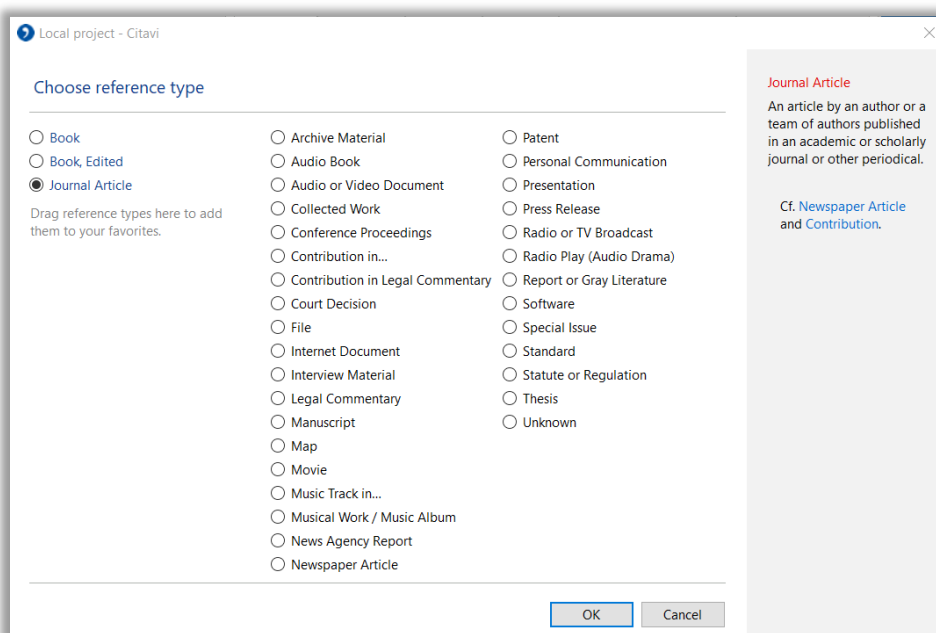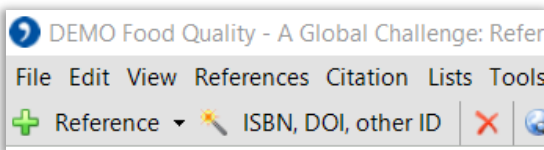
# Adding references

## + reference



Opening the menu over the little triangular symbol you see a direct pre-selection from the most common source types, or you can select further document types via an additional window by choosing new reference.



On the left, the "important reference types" are pre-set for access, you can add further reference types from the list by "drag & drop". After the selection an empty form opens, where you must enter all bibliographic data manually.
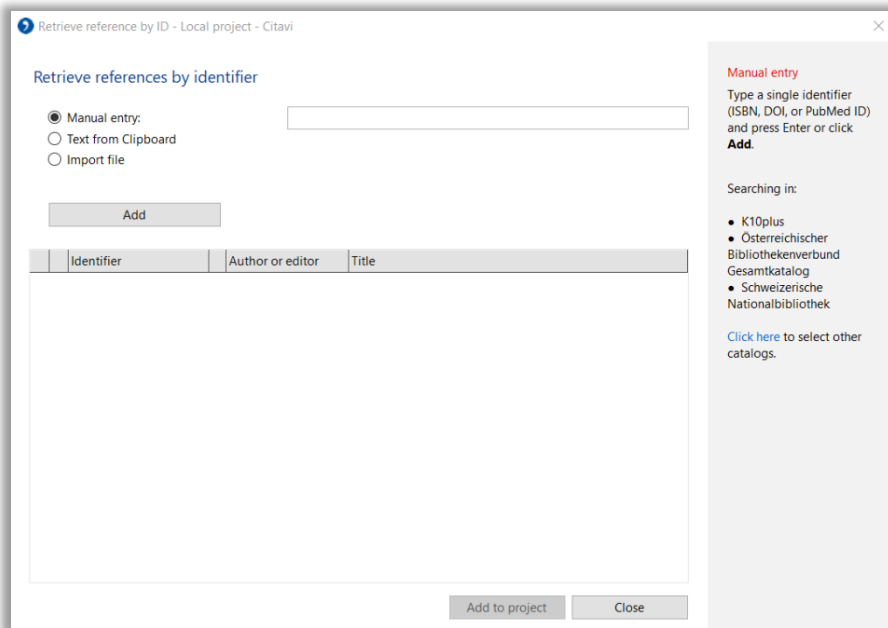
## ISBN, DOI, other ID

Using a unique identification number, one can quickly and easily add new sources to the project.
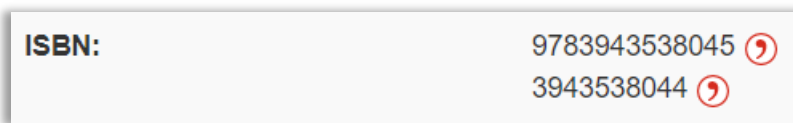
For adding references this way, you need an ID for example, ISBN (book) or DOI (article).



You can paste the ID into the field, copy it from the clipboard or import it from a file. Accepted file formats are rtf, txt, doc, docx, odt, pdf, csv.

## Citavi Picker
Once the picker has found a unique ID, the picker is displayed.



By clicking on the picker, you can transfer the corresponding title to the currently open project.

## Import via download
Bibliographic data can be downloaded from databases, catalogues, and other places in different formats to import them into Citavi. The most suitable formats are RIS, BibTex or EndNote Tagged. More about importing different formats in the Citavi Manual: Importing References.
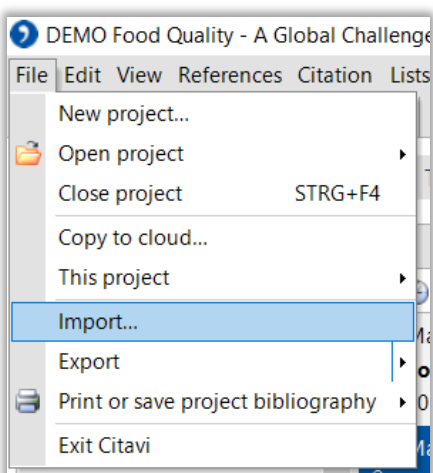


A window opens, here you can select the source and if necessary, the format and upload the file.

## Adding full texts via Drag&Drop

You can also insert already downloaded PDF documents into the project by dragging the PDF from the file manager into the second column with the list of references. If possible, Citavi searches for the necessary data from the file or online from catalogues. If Citavi does not link the information correctly, you may have to add it yourself.

**Important:** For all the documents you have added, using all the options given, you must double-check the information you find in the reference tab for correctness. The information listed here is the data that is used as the source when citing.

## Layout:

The top two rows of menus with several choices adapt to the categories.
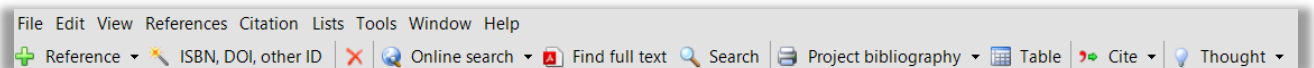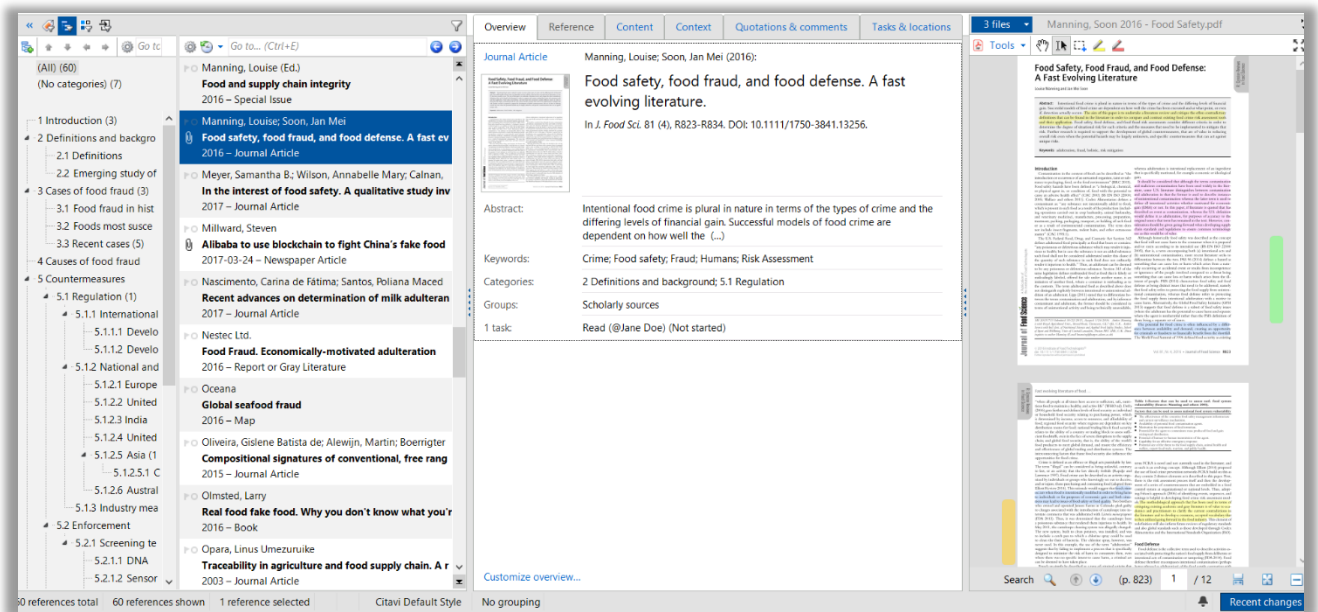


Below that follow the three categories: Literature, Knowledge, Tasks.
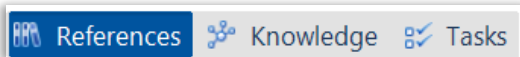


Depending on the selection, three or four columns then appear, which also adapt to the chosen category.

## Main area literature



*1st column: Classification via categories*
The literature can be sorted into categories. These categories can be displayed in a list or outline, for example, to reflect the structure or outline of the scientific work. It is easy to create new categories and subcategories via the small list plus sign, which can be moved via Drag&Drop. In addition, they offer a quick way to narrow down the literature list. The outline of categories is set by default, but you can also display the groups, keywords, or imports.

*2nd column: short entries of the listed literature*
Here you can find the whole list of inserted literature or a selection of it. It is displayed in three rows: authors/editors, title, document type and year of publication. If a full text is linked, a small paper clip appears next to the entry. The funnel icon can be used to narrow down the list.

*3rd column: Detailed information about source*

In this column you have all essential information and classification possibilities to the single entries of the literature list. There are several tabs to choose from:

| Overview | Reference | Content | Context | Quotations & comments | Tasks & locations |
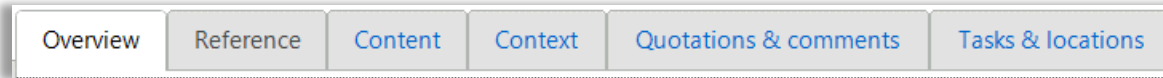
- <u>Overview</u>: most essential information from the following tabs briefly summarized.
- <u>Reference</u>: all bibliographic information used for citation, check correctness, add new fields if needed; attach local files or add online address
- <u>Content</u>: abstract, table of contents, own evaluation
- <u>Context</u>: keywords, categories, groups, references from and to other references
- <u>Citations & comments</u>: direct, indirect quotations, image sources, et cetera
- <u>Tasks & locations</u>: View and add tasks, view locations (internet links, local files, deposited library locations)
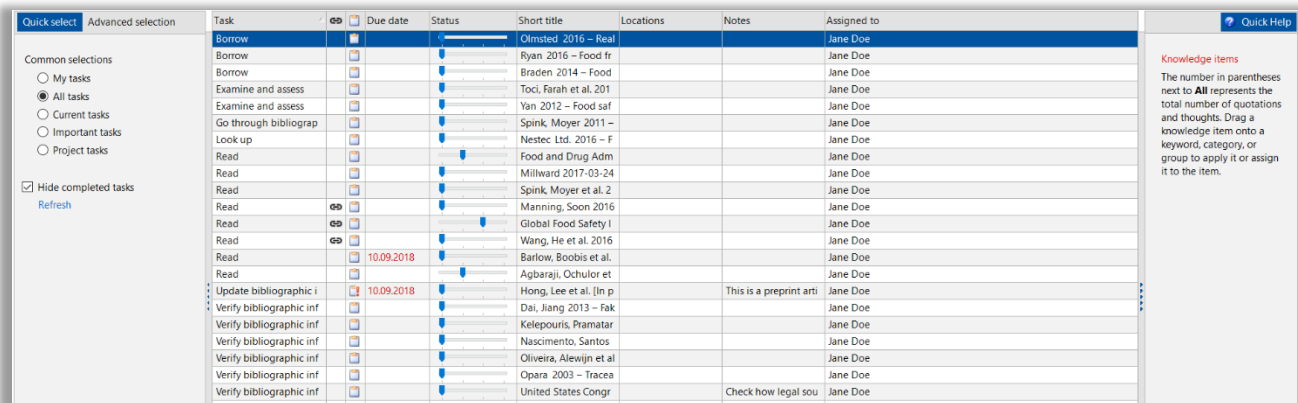
*4th column: Preview*

Here you can see the PDF full text file, if available. You can also view available online links, the cover or notes, or view content from the content, citations tabs. If a full text is available, you have the possibility to display it as a full screen and to mark areas, sentences as citations or to take over image sources.

## Main area knowledge
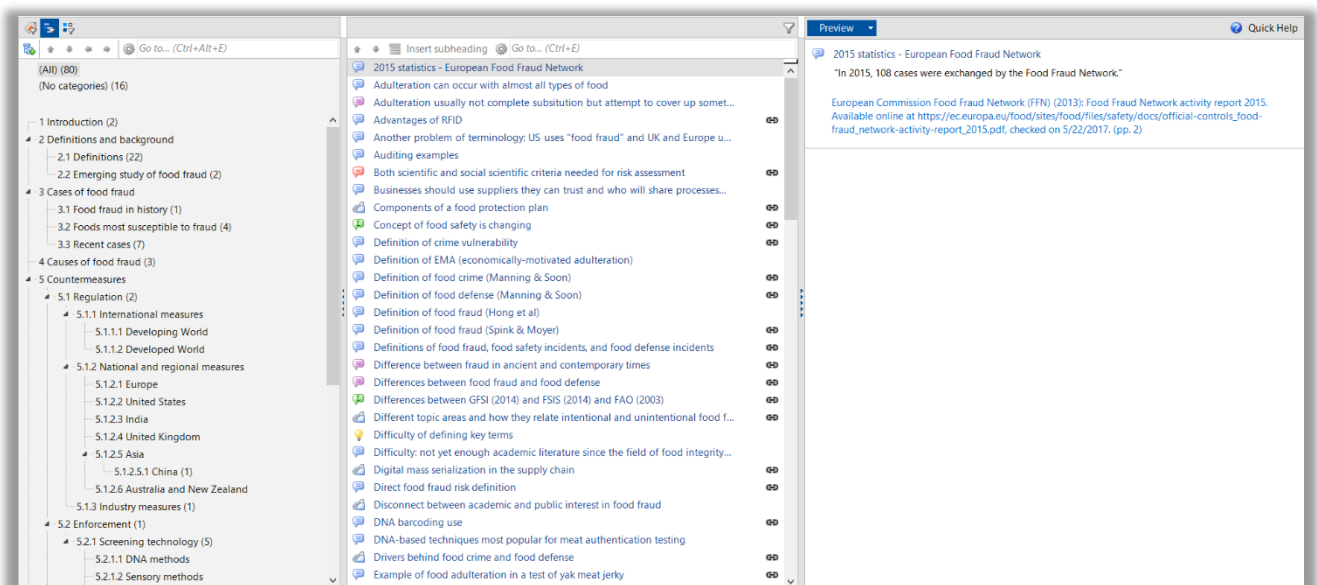


In the Knowledge area, the citations, image sources and comments or notes are listed and, like the literature, can be sorted into categories and groups. These can be displayed in the first column, which can alternatively display assigned keywords or groups. The citations are not automatically placed in the same category as the source from which they come; they must be entered manually. In the second column you can see the list of all entries. For each element there is a specific symbol. (Blue bubble = direct quote, purple bubble = indirect quote, ...) The third and last column is for viewing and previewing.

## Main area tasks



This section lists all tasks assigned to different resources. You can limit the list in the first column and, for example, display only the uncompleted tasks or the tasks selected by priority. In the display table you have an overview of the work status, deadlines, and which reference it is connected to.

# Citation style

## New settings
Citavi already offers many citation styles from which you can choose the appropriate one.
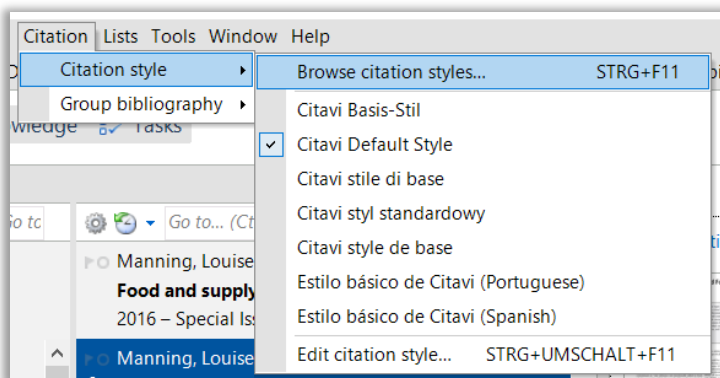


The default style is the Citavi base style, which can be selected in different languages. In the appearing window you can select "Search citation style" and search directly for the style, if the name is known, or enter the characteristics via the advanced search and thus find a suitable style. You will be asked where the reference appears (footnote or in the text), how the author is indicated (first name surname or last name, first name and written out or abbreviated) or whether the edition is indicated or not. If you have found a suitable style, you can select it. If none fits, you can take the one that fits best and adapt it to your needs.

## Edit style
With the option Edit citation style you can create your own style or adapt an existing one. In case of an existing one, Citavi creates a copy that can be edited. Read more in the Citavi manual: Using Citation Styles.

## Group bibliography
You can also use the citation menu to create groups for the automatically created bibliography. For this purpose, groups must be created in which the individual sources are classified. A grouping according to printed and online available sources is already available as a selectable option, Citavi usually recognizes the printed or online status automatically, which means, you do not have to classify the sources yourself.

# Further functions

- <u>Online search</u>: Search possibility in different library catalogues
- <u>Find full texts</u>: Search for available full texts to sources in the project, works best if VPN is active to find literature licensed to university
- <u>Search</u>: search in own project
- <u>Project bibliography</u>: print or create all sources in project in bibliography in currently selected citation style
- <u>Table</u>: tabular listing of all existing entries in the project
- <u>Cite</u>: insertion of references with Word, easier via Word Add-In
- <u>Thought</u>: quick insertion of a note to currently displayed source

# Citation in the work

## Word Add-In

With the installation of Citavi an Add-In for Microsoft Word is installed, which adds a Citavi tab to the menu bar.
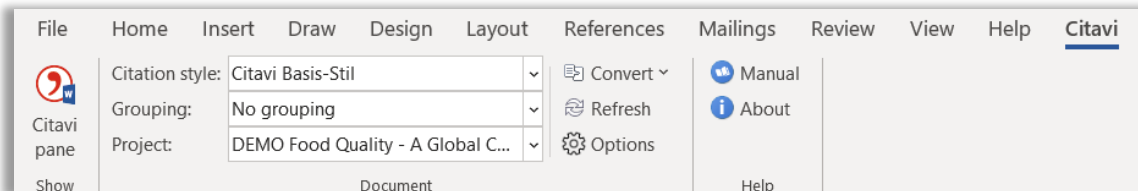


This tab allows you to link the project by activating the Citavi pane and linking the corresponding project. In the tab you can also set or change the desired citation style. You can also set the grouping here. If necessary, you can link another project. Via Options you can additionally set whether the reference should be made in the text or in a footnote, if this is not or differently defined via the citation style. At this point you can also set that the bibliography is not created automatically, as it is set as default setting.
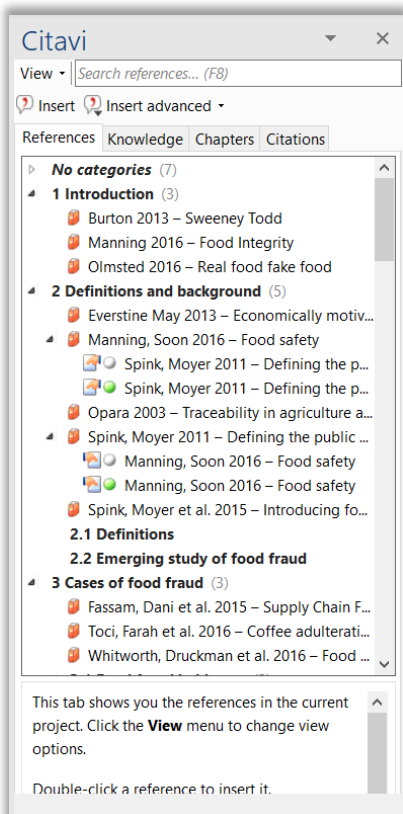
The reference section appears here in the references tab. The display in the created categories is pre-set. Under "View" at the top you can also display the list completely without categories. Here you can select the desired source from the list and insert it. It is recommended to insert with options, because there you can enter the page number and if necessary "see" or "cf". After insertion, the reference appears, and the cited source is automatically included in the bibliography and sorted alphabetically by author or editor.

In the Knowledge tab you can insert the prepared citations directly by double-clicking. If you have entered the page number in Citavi, you can bypass the "insert with options" here.
If an error should have crept in in the title data or author names or at any other place in the citation, it is important to change this in Citavi and not in the Word document, since otherwise with the next update the error appears again. Using the Citations tab in the Citavi pane, you can view all entered references and change them if necessary or add or remove a citation and then link the entry again.

## Help and further information

- Very detailed and extensive support page of Citavi via Citavi Support
- news, hints, and updates via the blog
- via support you can get to the forum, many questions, and ideas about problems, some of which have already been solved
- ask in the library: contact: Rosa Böhmer, on UB website - contact

17.08.2022
Rosa Böhmer