Citavi 5 – Getting Started

Citavi helps you with all research tasks, from searching for sources, to knowledge organization and task planning, to creating a final publication.

1 Setting Up

❶ **Install** After downloading, double-click Citavi5Setup.exe to begin the installation. The Word Add-In and the Pickers (for Firefox, Internet Explorer, Google Chrome, and Adobe Acrobat and Adobe Reader) are automatically installed as well. Pickers let you easily copy information from web and PDF documents.

❷ **Functionality** The number of references you can save in a project depends on if you are using Citavi Free or a licensed version. Citavi Free lets you save up to 100 references per project, while a licensed version allows you to save up to 100,000 references per project.

❸ **Obtaining a License** You can purchase a license in our online shop at www.citavi.com/shop. If your college or university offers a site license for Citavi, you can request your free license key at www.citavi.com/sitelicenses.

❹ **Enter License Key** You will find your license key in your Citavi account, where you can copy it to the Clipboard. Then, on the Citavi Welcome Screen, click License > Enter a license key and continue through the license assistant.
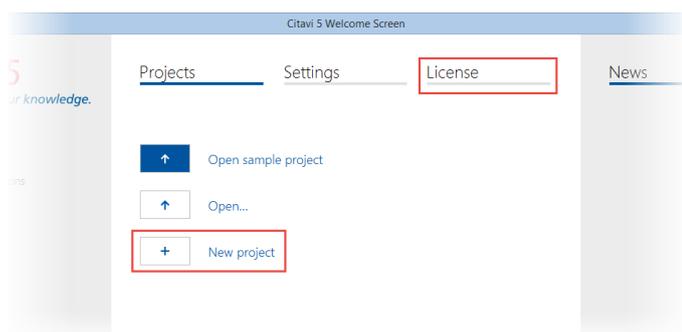
❺ **Create a New Project** On the welcome screen, click New Project.

Give the project a unique name (for example, *City Planning Semester Project* and click OK.

By default Citavi saves your projects in the folder *Documents\Citavi 5\Projects*.

❻ **Hint: Set up Backups** Citavi automatically saves your changes, so you don't have to remember to do so yourself.

Whenever you close a project, Citavi saves a backup of it under *Documents\Citavi 5\Backup*. The file name includes the name of the project, the date, and the time the backup was created. To increase the number of backups and change the folder for backup copies, click Tools > Options > Folders.

If you need to restore a project from a backup, simply double-click the file.

Backup copies do not include files attached to your project. Be sure to regularly backup the entire *Documents\Citavi 5* folder on an external drive.

2 Adding and Navigating

Citavi consists of three workspaces: the Reference Editor, the Knowledge Organizer, and the Task Planner.

Citavi offers 35 reference types to handle all your references properly.

❶ **Add a Reference** Click Reference on the toolbar and select the appropriate reference type.
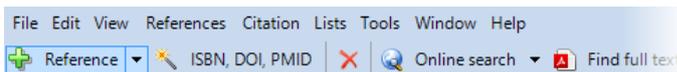
❷ **Hint: Reference types** How references appear later on in your bibliography depends on the reference type that's used. Which reference types are available? Click the reference types that interest you to read descriptions of them. You can drag the reference types that you use most often to the favorites on the left.

❸ **Enter Information** As you enter information, click Quick Help on the right to show helpful descriptions: they show you how to best use Citavi. Some fields also have clickable labels (if it's blue, you can click it!). If you click Author, for example, you get an author editor that can handle complex names:

Last name	First name	Middle name(s)	Abbreviation	Prefix	Suffix
Abbott	Andrew				
van den Meer	Simon				
Thomas	George	Clifford			Jr.
Click to add a person					

Simple names can be entered directly (note the semicolon between authors): `Miller, Peter M.; Smith, Jane`

The Contents tab lets you save abstracts, tables of contents, ratings ★★★☆☆ , and evaluations.

❹ **Hint: Retrieve by ISBN, DOI or PMID** As long as you have an active Internet connection, you can quickly add references with an ISBN number, DOI name, or PubMed ID. Click ISBN, DOI, PMID and enter the identifier, and then click Add. Citavi downloads the bibliographic information for you.

❺ **Special Case: Chapters in Edited Books, etc.** First, add the Edited Book (or Conference Proceedings, etc.) and enter its information. Then click Add contribution. When you format your publication, Citavi automatically pulls the right information from each reference.

Reference type:	Book, Edited
Editor:	Graham, Steve; MacArthur, Charles A.; Fitzgerald, Jill
Title:	Best practices in writing instruction
Subtitle:	
Title supplement:	
0 contributions	Add contribution

❻ **Navigate** Click the arrows ◀ ▶ to browse through your references. Click Back ⟳ to return to previously viewed references.

❼ **Table View** To see a handy overview of all your references, click Table. You can choose the columns to display and sort by.

3   Searching for Sources

You can search over 4700 library catalogs, bibliographic data-bases and more right from within Citavi.

❶ Add a catalog Make sure you have an Internet connection, click Online search, and then click Add database or catalog.

(Note: if you see "Available online: 0", then the Internet connection is not working correctly.)

In the Name field, enter a key word, such as "London" to find catalogs in London. This finds the London Public Library, the library of London Metropolitan University, and more. Select the catalogs you want, and then click Add. Continue entering search terms until you have added all the catalogs you want, and then click Close to finish.

❷ Run a Search Select the catalogs you want to search. You can select more than one catalog at a time. If you enter more than one search word, Citavi will search for results containing *all* of the search words. Pay attention to the Quick Help texts: they give you tips for building your search. Click Search to run the search.
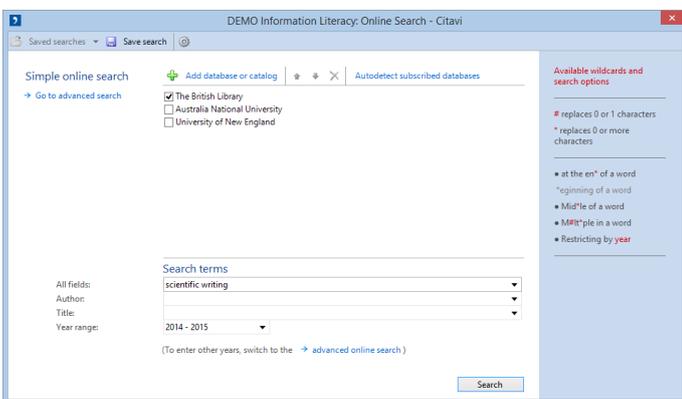
❸ Add Search Results Citavi presents the search results as a list. If the search didn't find what you want, try again with different search terms. Then select the references you want to add, and click Add to project.

❹ Cancel Selection The references you add to your project are automatically applied as a selection (a subset of your references), so the others are hidden. This makes it easier to work with just the new references, for example to review and create tasks for them (see section 6). To see all references, click Cancel selection in the status bar.
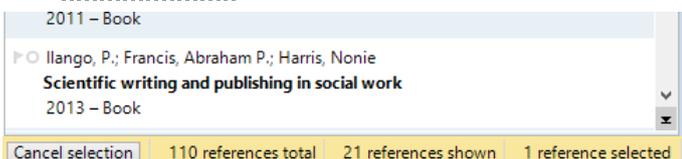
❺ Viewing Search Results Later On You can view a set of search results imported at a given time by clicking the auto-matically added entry in the Import Groups column.
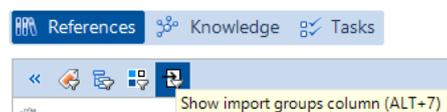
4   Checking Information

When you add reference information using the Online Search, the Pickers, or the ISBN, DOI, PMID feature, be sure to check the information that was automatically added to your project.

❶ Check the Reference Type How your references appear in your bibliography depends on the citation style and the reference type. After importing reference information, double-check that the reference type is correct. To change a reference type, click the blue label.
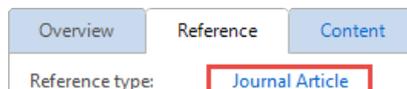
❷ Correcting Names Many databases export author names in capital letters or in the wrong order. Right-click the name and select the Edit option to make changes.
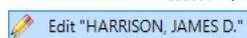
5   Using the Pickers

Pickers are extensions for Internet Explorer, Firefox, Google Chrome, and Adobe Acrobat and Adobe Reader.

The Pickers make it easy to add Internet documents to your project.

❶ Add a Webpage Make sure Citavi is running. To add a webpage to Citavi, load the page, then right-click anywhere in the browser window. Click Citavi Picker > Add webpage as reference. Citavi adds it to the current project as an Internet Document and copies the bibliographic information, if available. (If the page doesn't include it, you'll have to enter it yourself.)

❷ Hint: Save Webpage as PDF Webpages often disappear without warning. To make sure you always have a copy of the text, you can save a PDF of the page. In the Preview, load the page, and then click Save as PDF.

❸ Add a PDF Document The Picker for Adobe can not only add PDF documents as references, but it can also save the PDF files, too. Citavi adds a PDF as an Internet Document, extracts the bibliographic information from the PDF, and then links the PDF file as a Local file.

❹ Annotate Documents and Excerpt Quotations Read webpages, e-books, and PDF files in the Preview. PDF documents can be annotated, and you can convert webpages and e-books to PDFs for this purpose. Just click Save as PDF.

Excerpt text passages and images as quotations. Make sure to enter the page number if it does not appear automatically. Create tasks for individual passages, such as Examine and Assess or Discuss.

With a single mouse click, you can jump to annotations in a PDF file from Citavi or the Word Add-In. Additional information can be found at www.citavi.com/pdf-guide.

❺ Hint: Remove Line Breaks Text passages from PDFs often include hard line breaks. To get flowing text, double-click a quotation, etc. in Citavi to open it, and then press Ctrl+Shift+Space.

6 Planning Tasks

Photocopy, Verify bibliographic information, and Read are just a few of the tasks you can assign to a reference.

❶ **Assign a Task to a Reference** In the Reference Editor, on the Tasks & Locations tab, click Task.

❷ **Print a Task List** To get an overview of all your tasks, in the Task Planner, click Task list. A printable Task List is created.


❸ **Hint: Create a Project Task** In the Task Planner, you can also create Project tasks, which do not apply to a specific reference. This is good for major deadlines, deliverable dates, etc.

7 Creating an Outline

It's easy to create an outline for a paper with Citavi's categories. You can assign categories to quotations and thoughts you have collected to better structure your paper. This is very helpful later on while writing.

❶ **Create a Category System** In the Knowledge Organizer, click New category or New subcategory:
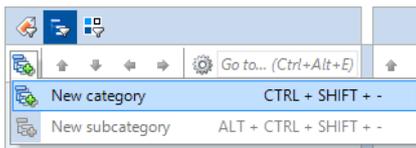
Name the category, and continue adding new categories and subcategories to match the structure of your paper.

❷ **Hint: One Project, Multiple Publications** Use the top level of your category system for the names of individual publications. Enter the sections for each publication as subcategories.

❸ **Assign Categories** You can assign one or more categories to every reference, quotation, and thought in your project. This lets you view only the items relevant to a particular section later on when you are writing your paper. Assign categories to references in the Reference Editor on the Context tab. To assign categories to a quotation or idea, double-click it and then enter the category in the corresponding field.

❹ **Modify Your Category System** It's normal to need to revise and change your outline as you progress. Just select a category and use the controls to move it to its new place in the system. (You can also drag a category to move it.)

The changes automatically apply to all items in your project assigned to the category.

8 Organizing Knowledge

You can save as many knowledge items — text and image quotations, thoughts, and comments — in Citavi as you need. The Knowledge Organizer helps you manage your collected knowledge.

❶ **Add Text Quotations** You can save quotations from the Preview as described in section 5. Of course, you can also add quotations manually if you don't have a source as a file on your computer. Choose the right kind of quotation: Direct quotation for a verbatim quotation, copied word-for-word; Indirect quotation for the author's thoughts in your own words; Summary for a heavily condensed version in your own words; Image or file quotation for images and audiovisual media; Comment for your opinions and notes about a statement by the author.

In the Reference Editor, on the Quotation, Comments tab, click New and then select the quotation type. Enter the Page range. Click Core statement to enter a concise rewording of the main idea of the quotation.

❷ **Add Image Quotations** Image and file quotations work the same way as text quotations. You can enter a Description and Caption as well. When you insert the image quotation into your document, the caption will appear underneath it.

❸ **Add a Thought** You'll find the light bulb 💡 everywhere in Citavi. Use it to jot down Thoughts at any time. If you have handwritten notes, scan them in or photograph them with a digital camera, and then save as an image thought.

❹ **Create Associations** Assign categories (see section 7), keywords, and groups to your knowledge items. Use categories for the sections in your paper and keywords for creating associations based on content. Groups can be used to organize knowledge items in a way unrelated to their content.

❺ **Get an Overview** In the category tree, click a category to see the knowledge items that are assigned to it. You can compare what different authors have said by selecting multiple quotations and looking at the content of the quotations in the Preview.

❻ **Sort Knowledge Items** You can arrange knowledge items in a logical order to structure the flow of ideas in your planned paper and make it easier to write. Select a knowledge item and use the arrows to move it up or down.

When you have a lot of knowledge items, you can use Subheadings to subdivide a category.

9 Writing with Word

With Citavi's Add-In for Word you can enter references and quotations into your document formatted exactly as your citation style prescribes. The bibliography is updated in real time to match.

Do you work with Writer or a TeX editor? Please see our user manual: www.citavi.com/manual5

❶ **Assign a Project to Your Document** Open a file in Word. On the Citavi ribbon, click Citavi pane. Select a project to assign to the document.

❷ **Select a Citation Style** To change citation styles, on the Citavi ribbon, click the Citation style dropdown menu. Click Add citation style. You can search for styles by name or citation system.

It's important that you decide whether you want to use a footnote style or an in-text citation style before you start writing. You can switch styles later on, but only within the same type of style.

❸ **Insert Categories and Knowledge Items** If you used categories to structure your knowledge items (as described in section 7), insert your categories as headings. Right-click a category on the References or Knowledge tab in Word. Click Insert as heading to insert the category as a heading at the insertion point.

❹ **Hint 1: Quickly Create a Rough Draft** Instead of inserting individual chapters, you can use the option Insert categories and knowledge items to quickly create a rough draft of your paper. This lets you draw on the work you've done in Citavi when you begin writing your paper in Word.

❺ **Hint 2: Insert an Outline from Citavi** You'd rather only insert your outline and add quotations yourself while you write? Right-click a category, point to Insert categories and knowledge items, and then clear the Include knowledge items checkbox. Your category system will then be inserted using Word headings. On the Chapter tab, you can view and insert the references and knowledge items for the chapter in which the cursor is located.
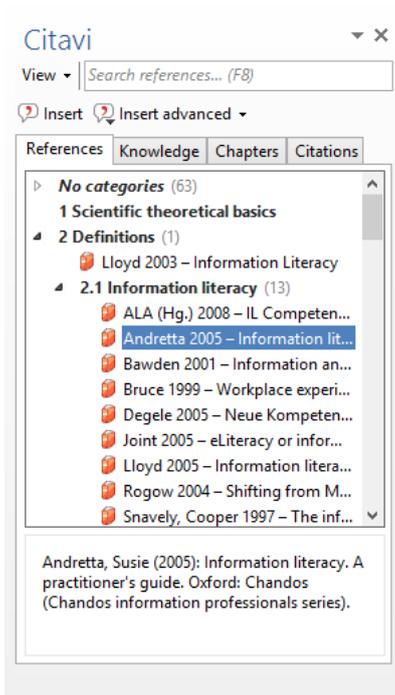
❻ **Insert References** On the References or Chapters tab, select the reference you want to insert. Either click Insert or double-click the reference.

❼ **Insert Quotations or Thoughts** On the Knowledge or Chapters tab, select the quotation or thought you want to insert. Either click Insert or double-click the knowledge item.

❽ **Change the Form** For in-text citation styles using the author and year format, you can easily change the format of the citation.

Options include (Doe 2013), Doe (2013), Doe 2013, only Doe or only 2013. To choose an alternate form, select the reference and click Insert advanced. Alternatively, you can right-click an already inserted reference. In the shortcut menu you can then select the form you want to use.

❾ **Enter Page Numbers** If you insert quotations from your project, Citavi will insert the page numbers automatically. Alternatively, you can insert a reference and then add the page numbers. On the References tab, select a reference. Either start typing the page number or click Insert advanced and enter the page numbers in the Page range field.

Do not add prefixes or suffixes such as pp. 12-14. Your citation style will do this for you.

❿ **Entering Multiple Citations** First, insert the first reference into your document. Then, place the insertion point in the reference you just inserted. Insert additional references. Depending on the citation style, you will end up with a citation that looks like (Doe 2013, Miller 2013, and Smith 2010) or [14-16].
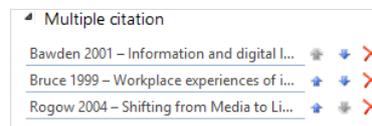
⓫ **Editing Multiple Citations** Select the multiple citation in the text. Click the Citations tab. Near the bottom of the pane you can delete unwanted references by clicking the ✕ or change the order of citations with the arrows.

10 Project Bibliographies

Sometimes all you need is a simple list of references.

❶ **Print Project Bibliographies** On the File menu point to Print or save project bibliography and then select Print in current citation style. This will generate a list of the references currently displayed in the current citation style.

❷ **Select References** If you want a list of all the references in your project, continue to step ③. If you only want one reference or a small number of references to appear in the bibliography, select them using the Ctrl key. Then right-click one of the references and select Apply as selection. You can use the Filter ▼ or Search features to create a larger selection.

❸ **Change the Sort Order** As a default, Citavi sorts all references alphabetically and then by year. To change the sort order, right-click the list of references. Click Sort and then set the sort order the way you want it.

❹ **Change the Citation Style** On the Citation menu, click Citation style, and then click Browse citation styles. After that click Find and add style.

❺ **Choose what Your Bibliography Should Include** To create a list of references grouped by specific criteria, click Print grouped or Save grouped. To create a list of references with quotations, abstracts, evaluations, etc., click Print annotated or Save annotated.

? More Information and Help

Download: www.citavi.com/download
Account: citaviweb.citavi.com/account
Manual: www.citavi.com/manual5
Support: www.citavi.com/help