

Lecture Notes of the Course

Reference Management with Citavi – Introductory Course

Citavi

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Reference Management with Citavi – Introductory Course

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1. Why should I use reference management software – why Citavi?

Reference management software helps you with academic work and writing. In general, there are three principal functions:

- Collecting citations, **references**^{*1} and files
- Managing your references in order to maintain an overview even over a longer period of time
- Display of reference lists and automatic citation

There are numerous other reference management software or products, e.g.:

- commercial products: EndNote, RefWorks, ReferenceManager
- open-source software: Zotero, Mendeley, JabRef, BibSonomy, Docear, Colwiz
- reference management as part of certain software: BibTEX as a component of LATEX or reference management in Word
- See our [Comparison of Reference Management Software](#) to decide which management software works best for you.

TUM has a campus license for Citavi. TUM members receive a license key free of charge if they identify with their TUM e-mail address. Citavi has the following significant advantages:

- The program is widely used in German universities.
- It provides either a German, English, French, Spanish, Italian, or Portuguese intuitive user interface.
- In addition to reference management, Citavi offers tools for knowledge organization and task scheduling.
- Citavi Team offers the opportunity to work on a **project** in teams.
- There are good, extensive help texts.
- A web version that works independently of the operating system.

However, Citavi also has some disadvantages:

- It is less common internationally, compared to e.g. EndNote or RefWorks.
- The software is installation-based, not web-based.
- Limited functionality of the web version
- Installation-based Citavi only runs on Windows.

¹ Elaboration of terms and concepts of words in bold and blue can be found in the glossary.

2. Installing Citavi

Please note: you can only install Citavi on a Windows operated PC. However, Mac users can also use Citavi by making a detour:

https://www1.citavi.com/sub/manual6/en/index.html?installing_on_a_mac.html

Alternatively, Mac users can use the browser-based Citavi Web. However, the web version offers limited functionality: <https://help.citavi.com/knowledge-base/article/citavi-web-fehlende-funktionen>

System Requirements Citavi 6:

- Windows operating system as from 8.1 or Windows Server as from 2012
- 4 GB working memory
- 300 MB disk space for the program and additional disk space for projects.
- Internet Explorer 11 (incl. JavaScript) for logging into the Citavi account

For the installation on a Windows-PC, follow these steps:

1. Download the free installation file of the latest version of Citavi 6. You can get this here: www.citavi.com/en/download.
2. Install Citavi.
3. Open the software. If Citavi does not start properly, one potential problem is that you did not install the Windows updates. Please, install updates and then try starting Citavi again.

If you have any problems with the installation of Citavi, please contact our team:

literaturverwaltung@ub.tum.de

Citavi is a paid programme that can be tested free of charge for 30 days. Students and employees of TUM can activate Citavi as a full version as part of the campus licence. Proceed with these steps:

1. Register for a Citavi account to use the full feature set: www.tinyurl.com/Citavi-Webaccount.
2. Select the appropriate category ("Faculty or staff member" or "Student") and enter your TUM e-mail address. Authentication with a freemailer address (e.g. web.de, GMX, Gmail) is not possible. You will then receive a confirmation e-mail for the correctness of your address.
3. After successful confirmation of your TUM e-mail address, select a password for your Citavi account.
4. Open Citavi and click on the login icon in the start window. Enter your access data for your Citavi account. The license information is now automatically recognized.

3. Cloud Projects

From version 6 onwards, Citavi offers a cloud. The Citavi Cloud has two functions. First, it provides the license key. Secondly, it serves as storage for your Citavi projects. The cloud is located on Microsoft servers in western europe. For more information on data protection, see the Citavi Manual: https://www1.citavi.com/sub/manual6/en/index.html?privacy_information.html

For each project, you can decide whether you want to store it in the Citavi Cloud or locally on your PC or a network drive. You can edit your cloud projects from any computer that has a Citavi 6 installation or with Citavi Web.

On Citavi's welcome screen, the recently used projects are displayed.

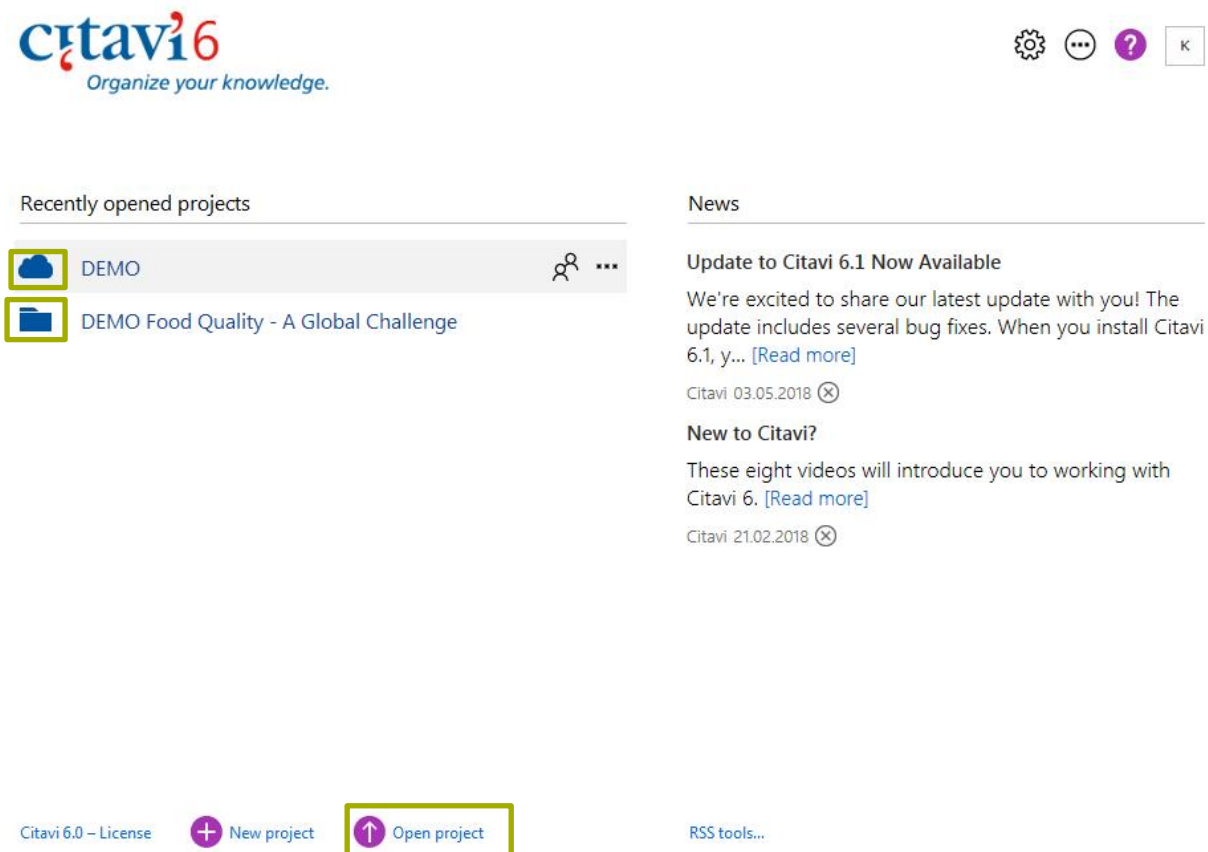


Fig. 1: Citavi welcome screen, Projects storage locations

The folder and cloud icons in front of the project title indicate whether the project is stored locally or in the cloud. You can open all other projects via the *Open project* button at the bottom.

In this opened window, the tabs *Cloud* and *Local* show all your projects. If you move your mouse over one of your locally stored projects, three dots appear on the right. By clicking on the three dots, you can see where the regarding project is stored as well as a description (if available).

If you move your mouse over one of your cloud projects' titles, another button with two little men appears. By clicking on this, you can invite colleagues and fellow students to your project and give them reading or editing rights. You can also communicate with your team via a chat function.

4. Workspaces and Views

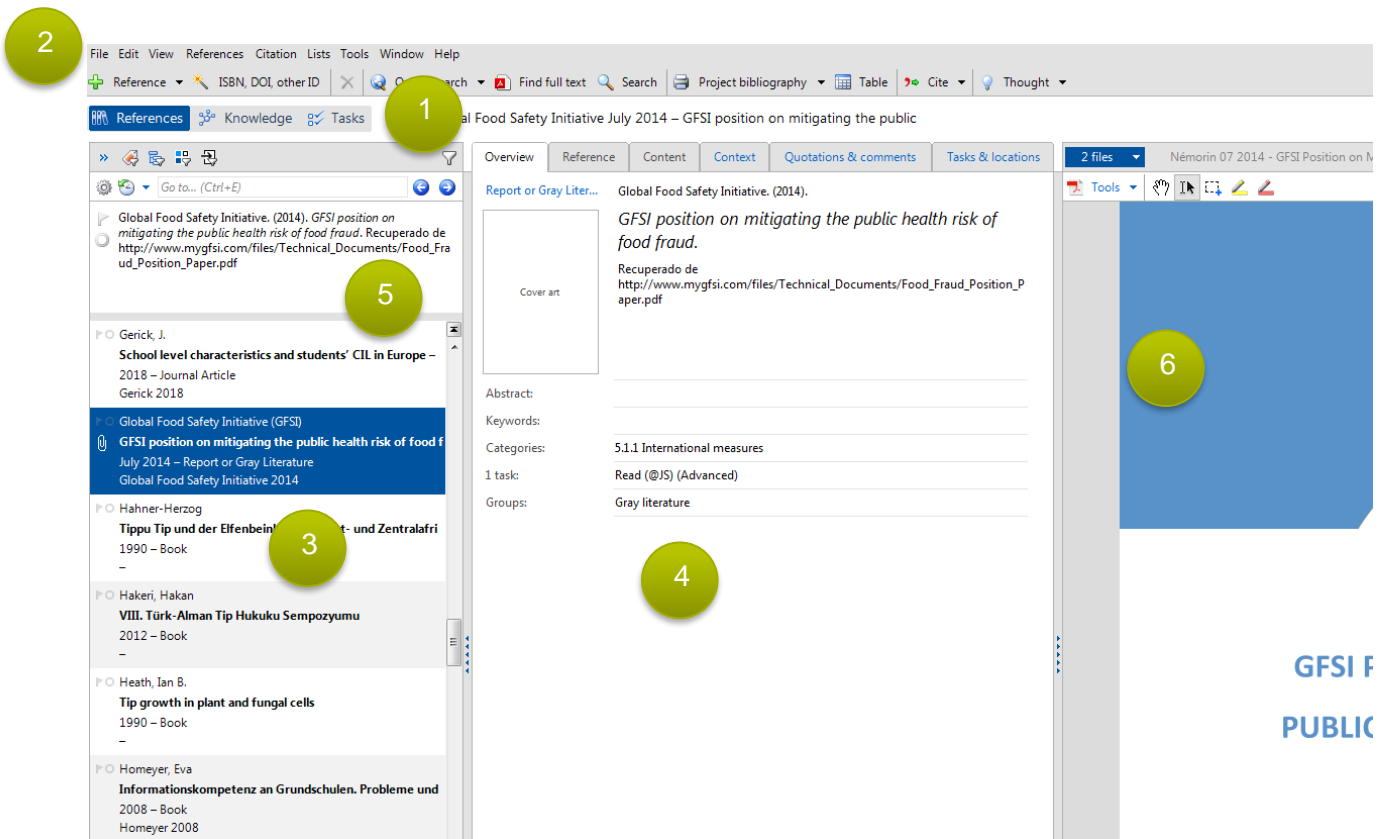
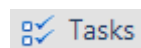


Fig. 2: Citavi interface

1. Workspaces

Citavi offers three workspaces:



Reference Management, Knowledge Organization and Task Management. You can use these via their respective symbol.

2. Menu bar and buttons

While the menu bar remains the same in each workspace, the available buttons are context-sensitive, depending on whether you are located in the reference management, knowledge organization or task management workspace.

3. Navigation area


In the left panel, you will find - depending on the workspace - an overview of your collected data. While using the reference management, your references are listed, sorted by surname of the author or of the institution. The currently selected title is highlighted in dark blue.

4. Content and working area

In the central panel, you see further information of the selected title on the left. The panel is organized in tabs. When a tab appears in blue, it contains the following information:

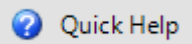
- *Overview* provides an overview page that can be customized individually (customize overview... at the bottom of the page). Here, one of Citavi's principles can be seen: Everything that is written in blue can be clicked on and leads to additional features or selection windows.
- *Reference*: Here, the referencing details are gathered, which are used to quote afterward.
- *Content*: Provides a table of contents and abstract. You can give a rating of the source.
- *Context*: Here you specify how the source fits into your overall topic, by assigning keywords, assigning the text to a category (of your outline) and by making connections to other works.
- *Quotations*: Record direct, indirect or figurative quotations from the document or create summaries or comments for yourself.
- *Tasks & Locations*: Define the tasks for a source and record where or how you can access the document, be it in the library, on your own bookshelf, your PC or on the Internet. You can also embed links or a PDF file (e.g. the full text of the article).

5. Title-Preview-Window

In the window at the top left of the list of titles, you can navigate through your sources, filter according to specified criteria and have the chosen title displayed in the currently selected referencing style. Define with the gray cog wheel what is to be shown in the navigation area 

6. Preview window

In the preview window, you can display and edit PDF documents and HTML pages that were saved with the title. In a yellow bar in this window, you are able to create PDF copies of displayed web pages and store them in your Citavi project.

In the top right you find the . Here you can get further information and help texts, which are context-sensitive to the marked window content.

5. Adding references and quotations to Citavi

Citavi collects, organizes and inserts your references.

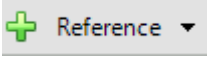
You first enter bibliographic data, e.g. information on a book or paper which you wish to cite in your document. This is done in the “Reference” tab of the “Content and working area”. You can enter text you want to use in your document later using the tab “Quotations & comments”. This can be both verbatim quotes and paraphrases, summaries or comments for each title.

You can add titles to your Citavi Project in multiple ways. You can...

- enter title information.
- add them via a “**ISBN/DOI**” shortcut.
- evaluate reference lists for DOIs and ISBNs with the **Citavi Picker**.
- use the **Citavi Picker** to import documents on the web or **ISBNs** and **DOIs** from other websites (e.g. Amazon).
- import them from a database you use for your research.

The following sections will explain each option in detail and later give a short overview on how to add quotations to individual titles.

5.1 Manual entry

Clicking the  button opens a new window that allows you to add a reference to your Citavi project manually. Choose the **document type*** that applies. Drag and drop document types that you need more often to the selection on the left-hand side.

On document types:

The choice of document type determines how certain information on the item (e.g. title, author, editor) can be entered. It is also one of the factors determining how citations are depicted in your final document and in your bibliography.

Depending on the document type, the relevant fields will be displayed in the reference management area on the reference tab. For instance, the document type *journal article* provides fields for *volume*, *issue number* and *page range*, while the document type *software* displays fields such as *operating system*, *storage* medium or *version*. Here is an example of how different references for different document types are displayed:

Citation style: APA style, document type “Book”:

Yannakakis, G. N. (2018). *Artificial intelligence and games*. **Cham: Springer.**

Citation style: APA style, document type “Journal article”:

Yan, Y. (2012). Food safety and social risk in contemporary China. **The Journal of Asian Studies**, 71(3), 705–729.

If you are not sure which document type you need to use, you can try out multiple types and have a look at the “Title Preview Window”. Check that your reference list is shown to your specifications and either change document type or citation style accordingly. Citavi also gives definitions of the selected document type in the gray shaded column on the right side of the screen and suggests alternatives.

Choose reference type

- | | | |
|--|--|--|
| <input type="radio"/> Internet Document | <input type="radio"/> Archive Material | <input type="radio"/> Patent |
| <input type="radio"/> Book | <input type="radio"/> Audio Book | <input type="radio"/> Personal Communication |
| <input type="radio"/> Journal Article | <input type="radio"/> Audio or Video Document | <input type="radio"/> Presentation |
| <input type="radio"/> Book, Edited | <input type="radio"/> Collected Work | <input type="radio"/> Press Release |
| Drag reference types here to add them to your favorites. | <input type="radio"/> Conference Proceedings | <input type="radio"/> Radio or TV Broadcast |
| | <input type="radio"/> Contribution in... | <input type="radio"/> Radio Play (Audio Drama) |
| | <input type="radio"/> Contribution in Legal Commentary | <input checked="" type="radio"/> Report or Gray Literature |
| | <input type="radio"/> Court Decision | <input type="radio"/> Software |
| | <input type="radio"/> File | <input type="radio"/> Special Issue |
| | <input type="radio"/> Interview Material | <input type="radio"/> Standard |
| | <input type="radio"/> Legal Commentary | <input type="radio"/> Statute or Regulation |
| | <input type="radio"/> Manuscript | <input type="radio"/> Thesis |
| | <input type="radio"/> Map | <input type="radio"/> Unknown |
| | <input type="radio"/> Movie | |
| | <input type="radio"/> Music Track in... | |
| | <input type="radio"/> Musical Work / Music Album | |
| | <input type="radio"/> News Agency Report | |
| | <input type="radio"/> Newspaper Article | |

Report or Gray Literature

Printed matter not published by a commercial publisher and not available from a bookseller, but instead published and distributed by the authors or editors themselves.

Examples: Reports from universities and research institutions; papers from organizations, agencies or companies; flyers; and advertising brochures.

Such papers are often solely or additionally published on the Internet as a PDF document. However, they should not be cited in the bibliography as an Internet Document, but as Report or Gray Literature (along with the Internet address).

OK Cancel

The screenshot shows the Citavi software interface. At the top, there is a menu bar with 'File', 'Edit', 'View', 'References', 'Citation Lists', 'Tools', 'Window', and 'Help'. Below the menu bar is a toolbar with various icons for reference management. The main window is titled 'References' and shows a list of references. The selected reference is:

- Gerick, J. School level characteristics and students' CIL in Europe - 2018 - Journal Article

The 'New reference' dialog box is open, showing the 'Reference' tab. The 'Reference type' is set to 'Journal Article'. The dialog box has several input fields for metadata, including Author, Title, Subtitle, Title supplement, Collaborators, Periodical, Volume, Year, Issue number, Page range, Article number, Online Address, Online since, Access date, Publisher, and Database. The 'Citation key' field is also visible. The right side of the dialog box shows '0 files' and 'No item is selected'.

When you have decided on a document type, confirm your selection with OK. You will then find a blank form with the appropriate fields.

In the form itself, Citavi offers help filling the form out:

- Items in blue font (e.g. in the featured input mask for journal articles - this would be *author*, *collaborators* *page range*):

or
By
item, a

will
enter
correct
on

opens
window
names

Author

Last name	First name	Middle name(s)	Abbreviation	Prefix	Suffix
* Click to add a person					

OK Cancel

Edit names of persons

New entry
Click the row with the asterisk * or press **Ctrl+N**.

Edit an entry
Click the row that needs editing or press **F2**. Then press **Tab** until you reach the desired row. To switch from editing mode to selection mode, press **F2** again.

Change the order of entries
Click in the gray area to the left to select a row. Move the row by dragging it or by pressing **Ctrl+Up Arrow** or **Ctrl+Down Arrow**. To select multiple rows, use the **Shift** or **Ctrl** key.

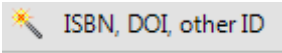
clicking on the new window appears that help you to items in the way. Clicking *author*, for example, the following to fill in the of the author/s:

Fig. 4: Blank form for journal article

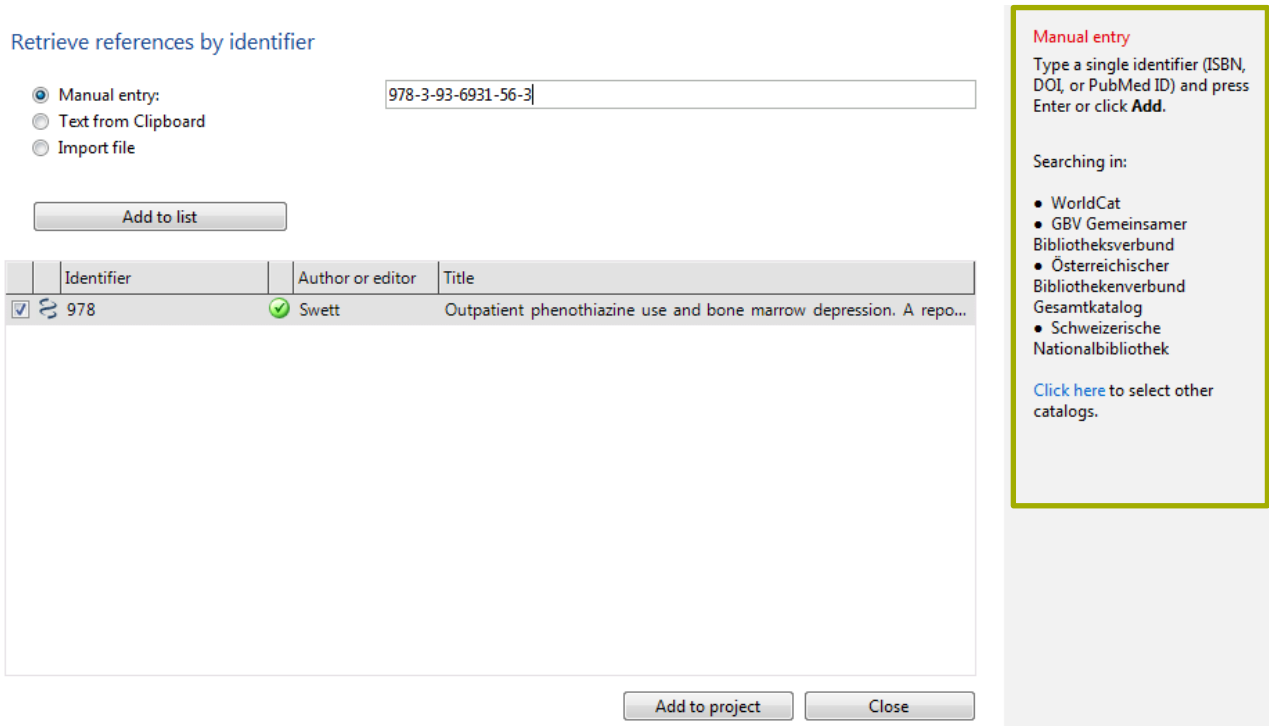
Fig. 5: Table for entering new author names

- Additionally, some rows contain a drop-down menu, which you can recognize by the down arrow on the right side. If you click on this arrow, a list will appear that contains all the keywords you have already entered for other items in this field. This can be for example all the journal titles from which you already added papers to your project.

5.2 Quick entry via ISBN or DOI

To do a quick entry via ISBN or DOI, click on  in the toolbar. You get a new window: *Retrieve references by Identifier*.

Enter an ISBN, DOI or PubMed-ID and click on *add* in the window below. This initiates a search through library catalogs and other databases, which you see in the gray shaded box to the right.



The screenshot shows the 'Retrieve references by identifier' window. At the top, there are three radio buttons: 'Manual entry' (selected), 'Text from Clipboard', and 'Import file'. A text input field contains '978-3-93-6931-56-3'. Below this is an 'Add to list' button. A table displays the search results:

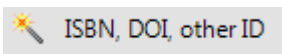
Identifier	Author or editor	Title
<input checked="" type="checkbox"/> 978	<input checked="" type="checkbox"/> Swett	Outpatient phenothiazine use and bone marrow depression. A repo...

At the bottom of the window are 'Add to project' and 'Close' buttons. On the right side, a gray box titled 'Manual entry' provides instructions: 'Type a single identifier (ISBN, DOI, or PubMed ID) and press Enter or click **Add**.' It lists the search sources: WorldCat, GBV Gemeinsamer Bibliotheksverbund, Österreichischer Bibliothekenverbund Gesamtkatalog, and Schweizerische Nationalbibliothek. A link 'Click here to select other catalogs.' is also present.

Fig. 6: Successful retrieval of a medium via ISBN

If Citavi finds the entered standard number in one of the selected catalogs, you will see a green checkmark together with the author and title of the citation. *Add to project* will include the source into your Citavi project.

5.3 Using reference lists containing DOIs or ISBNs

In the window *Retrieve references by Identifier*, which is accessed via the  button, you can search through a text that you have copied to the clipboard or stored on your hard drive for ISBNs or DOIs. This allows you to simultaneously include an entire series of books or journal articles in your Citavi Project. Citavi can read standard numbers (e.g. ISBN or ISSN

numbers) from documents in TXT, RTF, DOC, DOCX, ODT and PDF format.

Once you have pasted the text from the clipboard or retrieved it from a file on your hard drive, Citavi shows you all the ISBNs and DOIs identified in the document. Citavi then searches the catalogs and databases under the standard numbers that are displayed on the right side of the window in the colored box. Via the link *here* at the end of the list of catalogs, you can choose other databases.

If the book or article is in the selected directories and catalogs, it will be indicated with a green tick.

Retrieve references by identifier

Manual entry:
 Text from Clipboard
 Import file

	Identifier	Author or editor	Title
<input checked="" type="checkbox"/>	978	Swett	Outpatient phenothiazine use and bone marrow depression. A repo...
<input checked="" type="checkbox"/>	10.1126/science.314579...	Vogel	Higher education. A German Ivy League takes shape
<input type="checkbox"/>	10.1126/science.314579...	Vogel	Higher education. A German Ivy League takes shape
<input checked="" type="checkbox"/>	10.1099/00207713-48-4...	Lechner; Mayr; F...	Bacillus weihenstephanensis sp. nov. is a new psychrotolerant specie...
<input type="checkbox"/>	10.1099/00207713-48-4...	Lechner; Mayr; F...	Bacillus weihenstephanensis sp. nov. is a new psychrotolerant specie...
<input checked="" type="checkbox"/>	10.1099/ijsem.0.000852.	Neubeck; Hupta...	Pseudomonas helleri sp. nov. and Pseudomonas weihenstephanensi...
<input type="checkbox"/>	10.1099/ijsem.0.000852.	Neubeck; Hupta...	Pseudomonas helleri sp. nov. and Pseudomonas weihenstephanensi...
<input checked="" type="checkbox"/>	10.1099/ijis.0.036830-0.	Lang Halter; Ne...	Listeria weihenstephanensis sp. nov., isolated from the water plant L...
<input type="checkbox"/>	10.1099/ijis.0.036830-0.	Lang Halter; Ne...	Listeria weihenstephanensis sp. nov., isolated from the water plant L...
<input checked="" type="checkbox"/>	92-894-7772-5		From farm to fork

Import file

Select this option to import a list of identifiers saved in a text or word processing file. Click **Choose file** to select the file to import.

Searching in:

- WorldCat
- GBV Gemeinsamer Bibliotheksverbund
- Österreichischer Bibliothekenverbund Gesamtkatalog
- Schweizerische Nationalbibliothek

[Click here](#) to select other catalogs.

Fig. 7: Successful retrieval of multiple ISBNs

Deselect the references you do not want to include in your project by removing the tick at the beginning of the line. Click [Add to project](#). Now the selected references will be displayed separately from all others so that you can correct the automatically imported data if needed. Check for correct spelling and if all important fields are filled. If everything is correct, include the references in your project by clicking *Save selection* in the yellow bar at the bottom left.

5.4 Import via Citavi Picker


The Citavi Picker is a free browser add-on, which helps to transfer information from Internet Explorer, Mozilla Firefox, Google Chrome or the Acrobat Reader to Citavi. If the Picker was not automatically added to your browser during installation, you can install it later. Search for "Citavi

Picker" in the list of add-ons available in your browser of choice.

The Citavi Picker has three main functions:

1. Adding books or articles to your Citavi project with one click.
2. Adding web pages to Citavi. (Lecture notes 'Advanced Course')
3. Saving further information from the internet about the currently open title in Citavi.

How to import books or articles in Citavi with one click

Once the Citavi picker recognizes an ISBN or DOI in your browser window, the picker icon appears behind the number. 

By clicking on this icon, the selected book or article will be imported into your Citavi project.

Some search interfaces (e.g. Bavarian library union catalog - Gateway Bayern) and databases offer the option of importing the displayed results directly into Citavi.



The screenshot shows the Gateway Bayern search interface. At the top, there is a navigation bar with links for 'Einfache Suche', 'Erweiterte Suche', 'Suchhistorie', 'Merkliste', 'Suchergebnis', 'Kontakt', 'Hilfe', and 'Weitere Angebote'. The search query is 'Ihre Suchanfrage all fields = informationskompetenz'. The search results show one result: '1. Fachspezifische Vermittlung von Informationskompetenz in der Universität' by May, Monika, published in 2008. The result includes a 'Link (Online Zugriff)' and an 'Inhaltsverzeichnis' icon. A red box highlights the Citavi Picker icon (a small red square with a white 'i') located behind the number '1'. Below the search results, a message states: 'Citavi hat 10 Titel für den direkten Import gefunden. Klicken Sie hier, um die Titel zu importieren.' The interface also features a 'Suchfilter' sidebar with 'Bestand' and 'Schlagwort' sections, and a 'Weitere Optionen' sidebar with 'Optimieren Sie Ihre Suchanfrage' and 'Springen Sie zu ...' sections.

Fig. 8: Options for selecting several results in the Bavarian Union Catalogue (Gateway Bayern)

5.5 Import from a database

Literature databases usually offer you the possibility to export found bibliographic data of papers or other literature sources. The exact procedure varies from database to database. For the most important databases, you will find the procedure for importing references into Citavi stored in the database information system DBIS.

In principle, however - regardless of the particular database - you have to go through the following steps:

In the database:

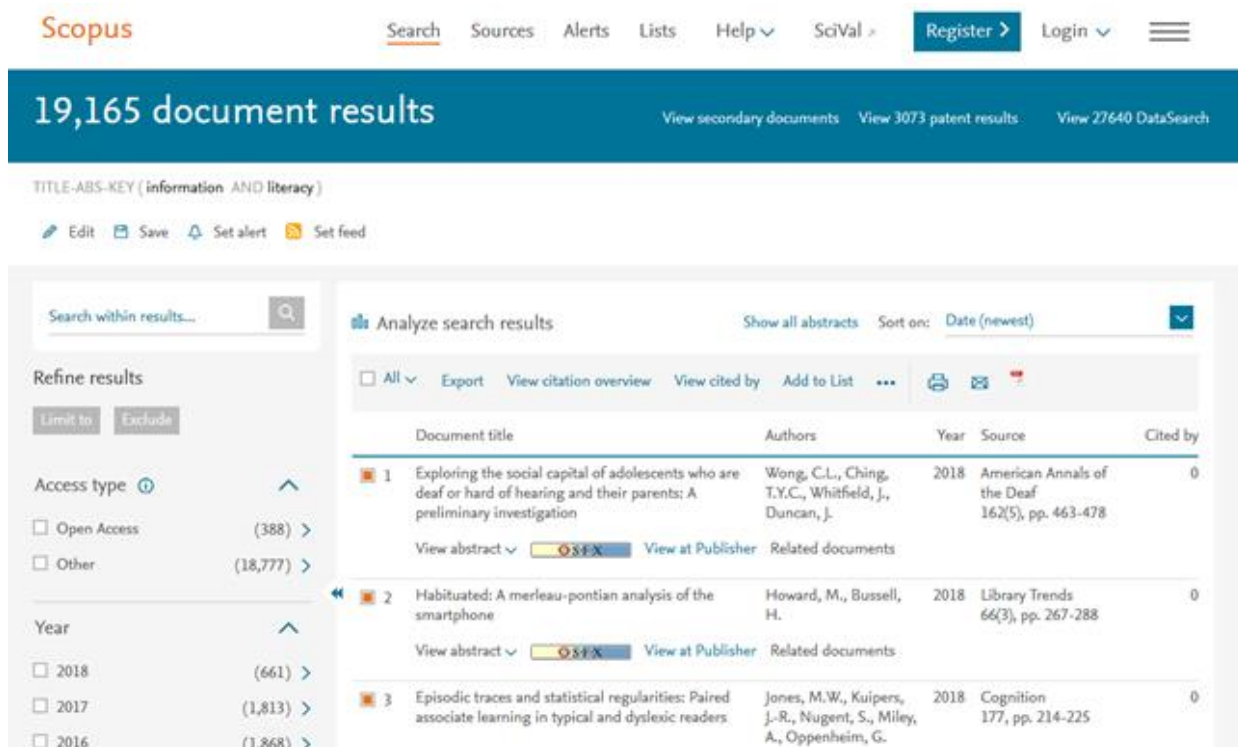
- Select the references you wish to export. In some databases, exporting is only possible from the wish list (also called MyList, MyFolder etc.).
- Select export path and export format. The link to choose this may be called “Export”, “Import”, “Cite it” or “Send to”. After clicking on the link, Citavi and the Citavi format are most likely not among the selection. In that case, select one of the following:
 1. Citavi can interpret files with the extensions .RIS, .OVD, .BIB or .ENW. .RIS is a particularly common format for exporting.
 2. Since Citavi can read the export files generated for the reference management software EndNote, you can also choose the EndNote format .ENW.
- Start exporting.

In the pop-up window to save the file:

- Click on "Open with" and select Citavi as the application to open the export file. If Citavi does not appear in the list of applications, you need to scan your PC for it. If you did not choose a different location during installation, you will find the required file citavi.exe under the following path: C: → Program → Citavi6 → bin → citavi.exe.
- If it is not possible to open the file directly, first save the export file to your hard disk and then import the file into Citavi (see below).

Import into Citavi:

- Case 1: The source and the format of the literature data was detected; the references can be imported directly.
- Case 2: The source and/or the format of the literature data were not detected correctly. Under certain circumstances, one or more of the following windows may appear:
 - You are asked to confirm which encoding is used by the source. In general, you can confirm the proposed character set (usually UTF8).
 - You are asked how the authors' name from the database is assembled (last name, first name or first name last name or the like). You will find the line for the author's name highlighted in red.
 - You have to select the filter that matches the database, so that the data can be imported. In this case, look for the name of the database from which you want to import your results. If the database is not included, please proceed as described in case 3.



Scopus Search Sources Alerts Lists Help ▾ SciVal > Register > Login ▾

19,165 document results View secondary documents View 3073 patent results View 27640 DataSearch

TITLE-ABS-KEY (information AND literacy)

Edit Save Set alert Set feed

Search within results...

Analyze search results Show all abstracts Sort on: Date (newest)

All ▾ Export View citation overview View cited by Add to List ...

	Document title	Authors	Year	Source	Cited by
1	Exploring the social capital of adolescents who are deaf or hard of hearing and their parents: A preliminary investigation	Wong, C.L., Ching, T.Y.C., Whitfield, J., Duncan, J.	2018	American Annals of the Deaf 162(5), pp. 463-478	0
2	Habituated: A merleau-pontian analysis of the smartphone	Howard, M., Bussell, H.	2018	Library Trends 66(3), pp. 267-288	0
3	Episodic traces and statistical regularities: Paired associate learning in typical and dyslexic readers	Jones, M.W., Kuipers, J.-R., Nugent, S., Miley, A., Oppenheim, G.	2018	Cognition 177, pp. 214-225	0

Refine results

Limit to Exclude

Access type Open Access (388) > Other (18,777) >

Year 2018 (661) > 2017 (1,813) > 2016 (1,868) >

- Case 3: The direct import does not work. In this case (this also applies to the operation of Citavi on a USB flash drive), download the export file from the database onto your computer and start the import process in Citavi with the command in the menu bar: File → Import.

On the next page, you can see an example import from the database Scopus in the Mozilla Firefox browser:

Fig. 9: Result list in the database Scopus - possibilities for exporting results

In the result list of Scopus, the results that are to be imported will be checked. Above the result list, there are suggestions on how to further proceed with the selected results. Among others, you can export to different reference management software (*Export*). Choose RIS as the export format.

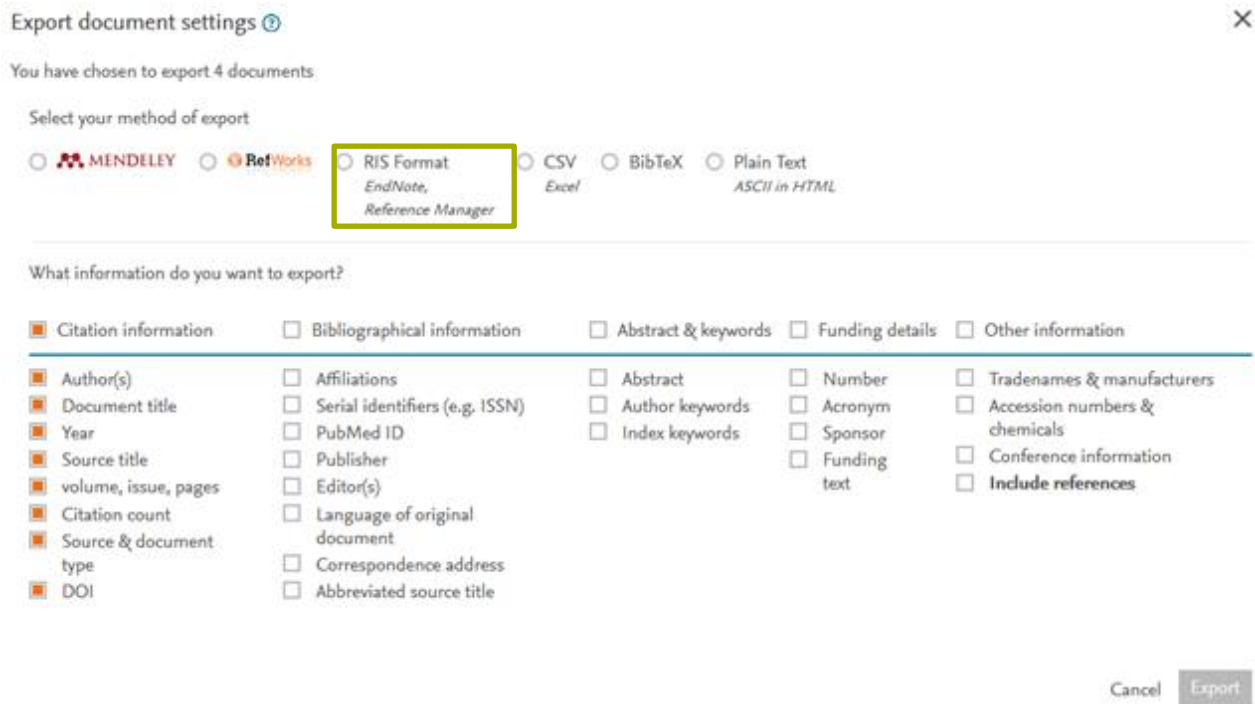


Fig. 10: RIS Format on Scopus

On the next page, you get a pop-up window where you can select the program to open the file or if you want to save it on your hard disk. Select "Citavi" as the application and confirm with *OK*. If you cannot choose Citavi at this point, you have to scan your hard drive for it.

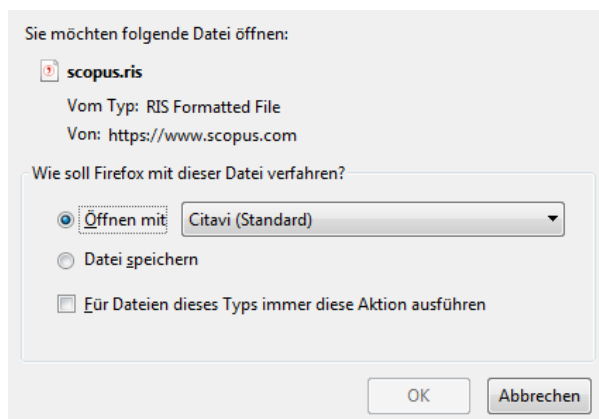
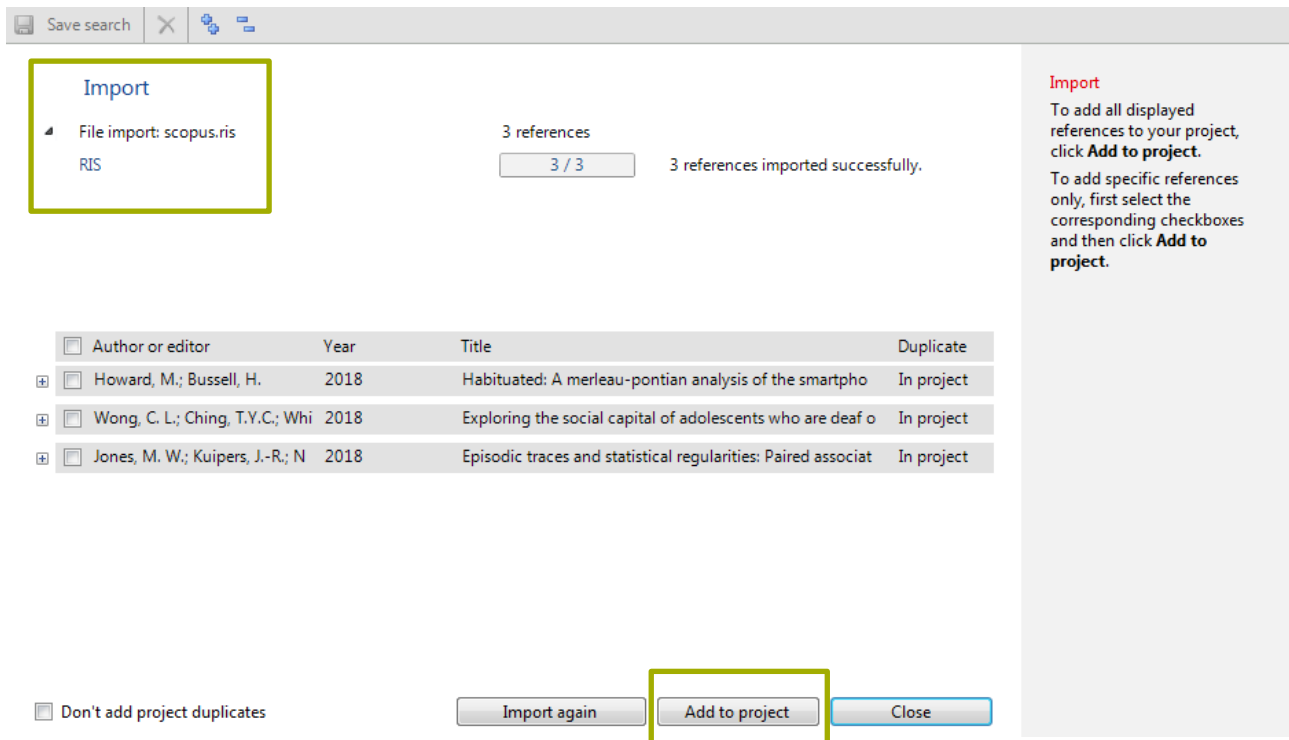


Fig. 11: Dialog box to save or open a file

The dialog box for saving and opening files will open. Citavi has already detected that the data comes from Scopus. Select the titles you want to add to your project and click *Add to project*.




The screenshot shows the Citavi import window. At the top left, there is a 'Save search' button and a close icon. Below this, a yellow box highlights the 'Import' section, which includes a sub-section for 'File import: scopus.ris' and 'RIS'. To the right of this section, it indicates '3 references' and a progress indicator '3 / 3'. A message states '3 references imported successfully.' On the right side of the window, there is a sidebar with the heading 'Import' and instructions: 'To add all displayed references to your project, click **Add to project**. To add specific references only, first select the corresponding checkboxes and then click **Add to project**.' Below the sidebar is a table of imported references:

<input type="checkbox"/>	Author or editor	Year	Title	Duplicate
<input type="checkbox"/>	Howard, M.; Bussell, H.	2018	Habituated: A merleau-pontian analysis of the smartpho	In project
<input type="checkbox"/>	Wong, C. L.; Ching, T.Y.C.; Whi	2018	Exploring the social capital of adolescents who are deaf o	In project
<input type="checkbox"/>	Jones, M. W.; Kuipers, J.-R.; N	2018	Episodic traces and statistical regularities: Paired associat	In project

At the bottom left, there is a checkbox labeled 'Don't add project duplicates'. At the bottom center, there are three buttons: 'Import again', 'Add to project' (highlighted with a yellow box), and 'Close'.

Fig. 12: Citavi-import-window

Following this, the Citavi interface appears. However, only the titles that you just added will be displayed in the list of titles on the left side. Below, in the (yellow) status line, you can see that the displayed sources are a selection. At this point, you can check the newly imported data and, if necessary, correct it. If you are happy with the data and would like to include it into your project, click on *cancel selection* in the status bar. The titles will now be added to your list of titles. With the red  in the toolbar, you can delete titles from the selection list or the project.

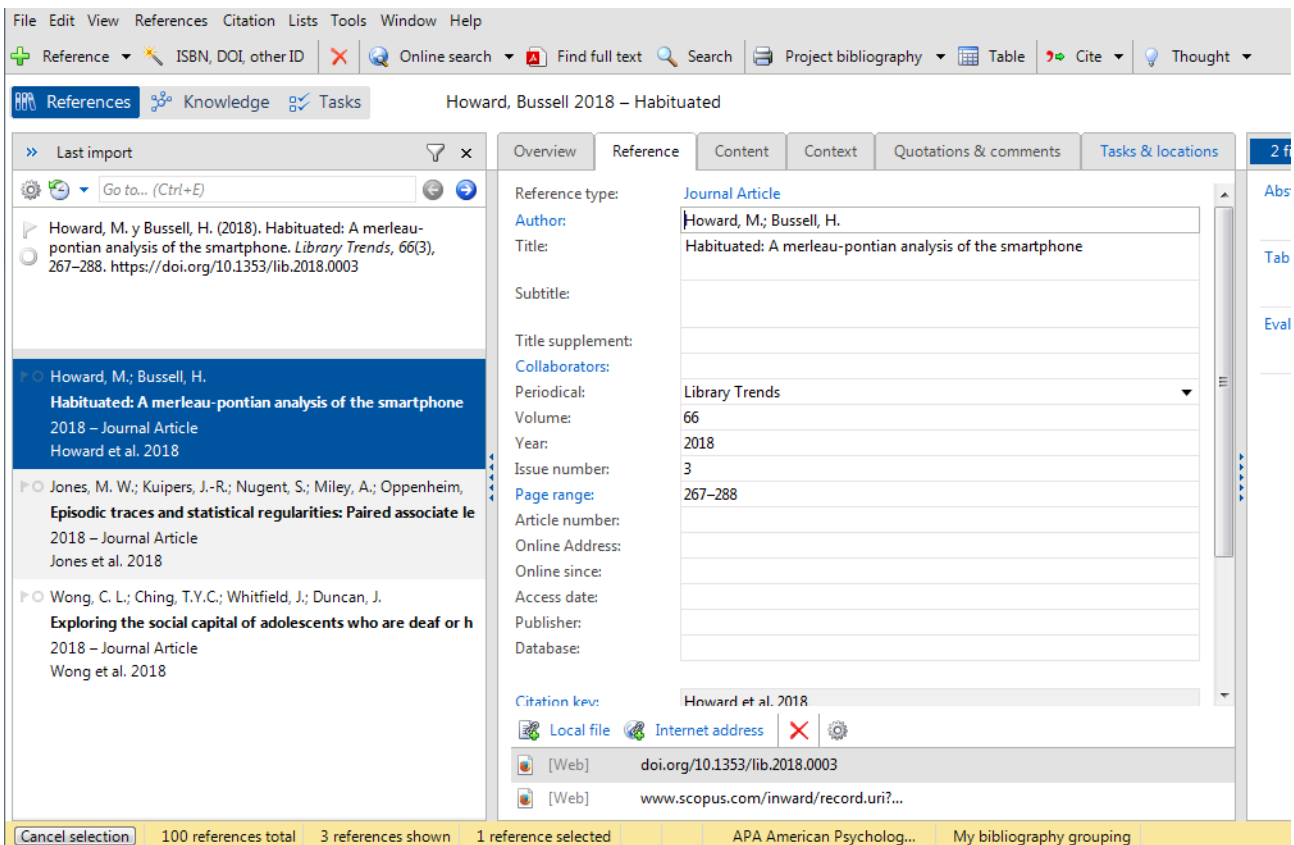







Fig. 13: Citavi Window: the titles that were imported, are still arranged in a selection.



5.6 Insert knowledge items


Citavi distinguishes between different types of quotations and provides fields for each type. Five knowledge items refer directly to a source:

-  **Direct quotation**
A text passage, which you type in exactly as it, appears in the original text. Please note: You have to insert quotation marks for direct quotes by yourself. They are not set automatically!
-  **Indirect quotation**
A passage in the text that you reformulate in your own words.


-  **Summary**
The most important statements are briefly summarized from a text or a passage of text.
-  **Comment**
Comment either the source itself or comment another knowledge element.
-  **Image quotation**
An image or file citation of a digital or digitized image from the source or a database to which reference is made.

The two other knowledge elements are independent of a specific text. With them you can record your thoughts on the topic and your ideas on the content.

-  **Thought** ▾ *(text)*
Write down ideas coming up while you are working.
-  **Thought** ▾ *(image or file)*
Capture an additional link or a suitable image.

The button  **Thought** ▾, with which you can include text, images or file quotations, can also be found in other program parts. It is the last element of the toolbar.

You can create new knowledge elements that refer to specific titles in three places:

1. Via the button  **Knowledge item** ▾ in the toolbar of the Knowledge Organization; If you choose this path, first select the title of the reference to which you refer.
2. Using the menu Knowledge Organization.
3. In the Reference Management section of the respective title in the *Quotations* tab (middle column).

6. Cite by using Word-Add-In

If you work with Microsoft Word and Citavi 6, you should find an extra menu in the Citavi menu bar. The Add-In helps to integrate sources and citations per double-click.

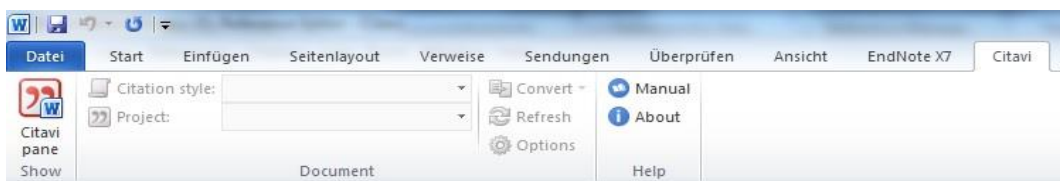




Fig. 14: Word-add-in

Click the button *Citavi pane* to choose the project you want to cite from. The given navigation bar presents the project references. For integrating sources, switch to the required passage in the text and double-click the right reference given in the *References-Tab*. It is also possible to use one of these buttons.   Insert advanced ▾

Insert advanced helps to add the reference pagination. Once you add your first citation, Citavi generates a bibliography at the end of the document. It is updated automatically whenever you add or delete a citation or even if you modify references in Citavi.

You can move between specific *citation styles* via the drop-down menu.

6.1 Insert Citations

As a rule, you will first include quotations in your text. To do this, select the tab *Knowledge*.

To insert a quotation, place your cursor at the desired position in the text. Select the desired source in the Knowledge tab and insert it into your text by *double-clicking* or clicking the *insert button*. With the first quotation, Citavi automatically creates a bibliography at the end of the document. Citavi updates automatically when you add quotations and sources, delete or change quotes or sources.

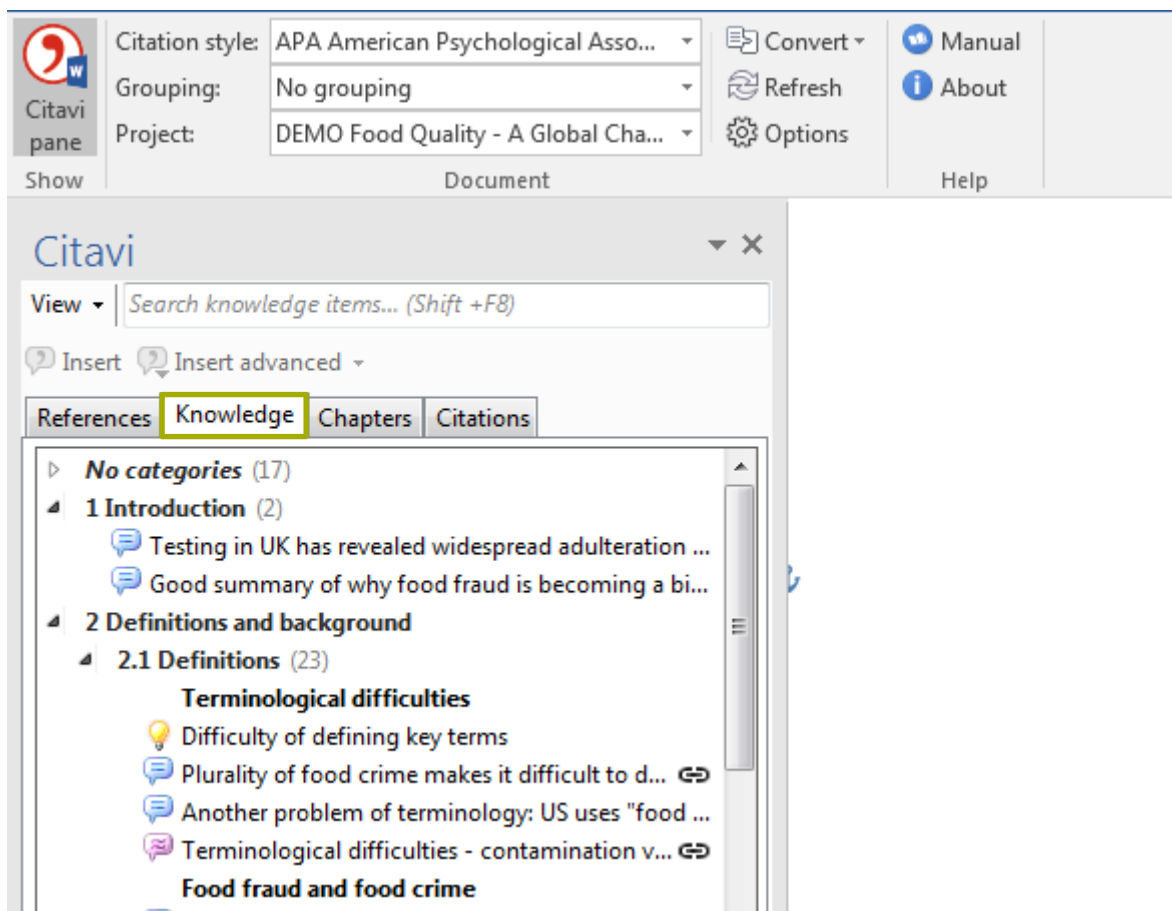


Fig. 15: Knowledge Management Word-add-in

6.2 Insert References

If you want to enter the quotations without Citavi and insert only a reference, place your cursor at the desired position in the text. Then select the desired source in the title tab and insert it into your text by double-clicking or clicking the *Insert* button. If you also want to specify pages for the selected source, choose the button *Insert with options*.

With the first inserted source, Citavi automatically creates a bibliography at the end of the document. Citavi easily updates everything when you add, delete or change sources.

6.3 Change Citation Style

You can switch between different *citation styles** by using the drop-down menu.

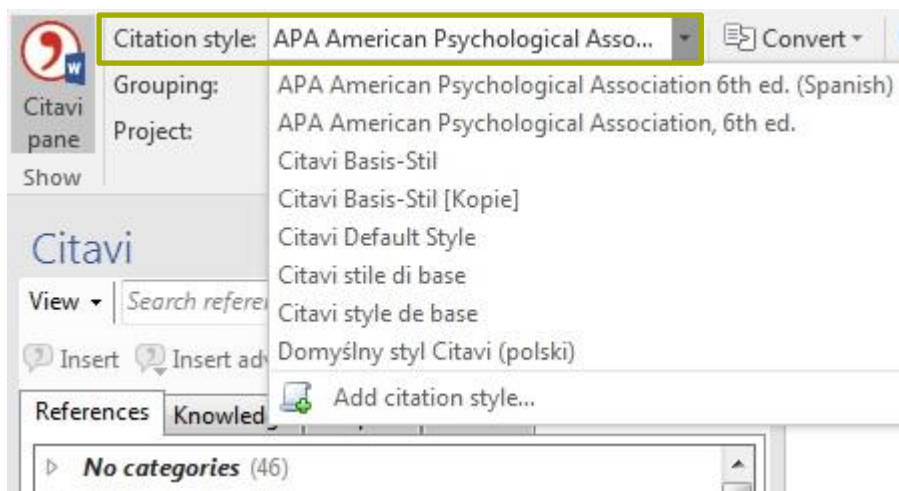


Fig. 16: Change citation style in word




7. Main settings

You define your settings in Tools → Options... in the menu bar. Here you can define, for instance:

- where Citavi will save the project files.
- how and where Citavi will create backup copies of your projects.
- in which library catalogs and book trade directories you want to search for bibliographic data (e.g. via ISBN-download).

8. Contact and support

If you have any questions about Citavi, you get help and support in various ways:

- In all working spaces, you will find the link for the  Quick Help in the right column. If this button is active, you will get context-sensitive information.
- In Citavi, you can access both the manual  or visit the Citavi website Service and Support  via the Help link in the menu bar. On this page, you will find FAQs about Citavi, clips and animations about the use of the software and a comprehensive forum for Citavi users.
- You are also very welcome to contact us with any questions you might have:
literaturverwaltung@ub.tum.de.
In addition to our Citavi Courses, we offer Reference Management Drop-in-Sessions. For further information please visit our website at: <https://ub.tum.de/en/kurse>

9. Glossary

Citavi Picker	The Citavi Picker is a free add-on that allows you to transfer information from Internet Explorer, Mozilla Firefox or Acrobat Reader to Citavi.
Citation style	An instruction on how literature sources are to be cited. Scientists or publishers create referencing styles. They contain detailed instructions on the formatting and the required information of the references.
DOI	Digital Object Identifier; unique identification number for electronic publications. Especially for journal articles, DOIs play an important role.
Document type	Document type is the expression for the external form of an information source, for example, compilation, newspaper article or audiobook. Document types are known in other contexts as "publication types" or "publication form". Citavi offers specific forms for the different document types to capture all relevant information.
ISBN	International Standard Book Number; since November 1971, each book has a unique identification number that is important for the management of media and for the book trade.
Project	A Citavi project is a collection of references, thoughts, quotes and tasks that are necessary for the achievement of a project objective (equivalent to the terms "file" or "database" in other Windows programs).
Reference	A reference refers to a single work in a project. If you add a new journal article or a book to your project, you create a new reference.