Exercise Sheet:
Reference Management with Citavi – Advanced Course

Preparation and starting Citavi
a. Please start Citavi.
b. On the welcome screen, you will find a cogwheel that offers the link *open sample project.* Please follow the link and open the *sample project.*

Exercise 1 – Categories and Keywords
Create new categories in Citavi using the outline of your current paper or of a previous work. If you haven't got an outline yet, you can use the outline of the following book: Academic writing : a handbook for international students by Stephen Bailey (2011). The first page of the outline should be enough.
Outline: https://tinyurl.com/y9pgcmsn
a. Show the category column left to the navigation panel (ALT + 5).
b. Create a new first category using your topic as the category's title or alternatively, the title *Project: Academic Writing.*
c. Go through your collected references and assign each reference to all categories it might be relevant to. You can do this by dragging and dropping the reference to the appropriate category or by using the categories function in the *Context* tab.
d. In addition, assign keywords to each reference, which describe its content. You can either create new keywords as you assign them in the *Context* tab or create them beforehand in the keywords column on the left (ALT + 4).

Exercise 2 – Organising Quotations in Citavi
a. Please open a pdf document in the preview window to the right.
b. Save a few interesting quotations by selecting them from the pdf document.

   - Add page numbers where appropriate.
   - Shorten a few longer quotations and mark the omissions.
   - Assign keywords to your quotation.
   - Assign your quotations to appropriate categories.
   - Think of a good core statement.
c. Also, add a thought to your project via the *Thought* button.

Exercise 3 – Inserting Quotations into Word
a. Please open a new Word document and write a short text. Alternatively, you can have Word create a text for you by typing **=lorem(5,5)** into the document and pressing enter.
b. Please insert one of the definitions for food fraud from the knowledge tab into your text document using the Word-Add-In or the *Cite* button in Citavi.

Exercise 4 – Im-/Exporting Outlines
a. Please export the category system to Word. You can export the categories either directly via the Word-Add-In or by using the knowledge organizer in Citavi.
b. Change a few of the category titles in Word and add new categories.
c. Afterwards, save the Word document and import it to Citavi. What happened to the categories you changed or added?

Exercise 5 – Creating Citavi Compilations

Create a Citavi compilation including all quotations and ideas from Citavi's sample project as well as the list of references for all quotations.

In Citavi: *Compilation* button (in the knowledge organizer)

In Word (with Add-In): *Insert categories and knowledge items → All Categories* including the option *Include knowledge items.*

Exercise 6 - Grouped Reference Lists:

Create a grouping for a grouped reference list, using document types as the grouping criterion. To do so, follow steps a-e.

a. Please go to the menu *Citation → Group bibliography → Create or edit grouping.*
b. Create a new grouping named *By reference type* (use the +button).
c. Add a new section to your new grouping. Use the reference type as your grouping criterion, so that all reference types are listed with their corresponding references.
d. Go to Word and create a new text document. Write a short text and insert some references.
e. In the Citavi tab in Word, go to the drop-down menu *Grouping* and select your new grouping *By reference type*. (The *Grouping* drop-down list will show up once you've created your first grouping in Citavi.)

Exercise 7 - Exporting Grouped Reference Lists to Excel

a. In Citavi, use the *Table* button to go to the table view and group the table according to publication year. Via the button *Columns,* you can adjust which columns you want to display in which order.
b. To export the grouped table view to Excel, click the Excel button in the toolbar or use the *Export to Microsoft Excel…* command in the *File* menu.

Excercise 8 – Formatting Reference Lists in Word

a. Please choose the citation style APA American Psychological Association, 6th ed in Word.
b. Via the *Options* button choose *Reference List* as the new heading for the references.
c. Change the style set *Citavi Bibliography Heading* to use the font Calibri.
d. Change the style set *Citavi Bibliography Entry* so that the space between different references is bigger than within a reference entry.

Exercise 9 – Changing and Modifying Citation Styles

Use the advanced search for citation styles to find a style that meets your requirements (*Citation* menu → *Browse citation styles → Find and add style → Advanced search*).

Finding citation styles

a. Consider how the different parts of your reference should look like
   - Citation system (footnote, in-text citation with number or author date)
   - Language
   - Author (order, initials, formatting, separating characters)
   - Formatting of different components (author, title, journal …)

Modifying citation styles

If there is no citation style that meets your requirements, choose a similar style and modify this one:

b. Modify the *Citavi Default Style* for books so that the author names are displayed in small caps.

Creating citations styles

c. Now create a new style. Books should be displayed in the reference list in the following way: Doe, John (2004): My Life. New York: Fastprints.

d. Define the rule set for in-text citations for books as followed: (Doe 2004, 34)

Exercise 10 – Importing PDFs

a. Import a pdf file or a folder with pdfs to Citavi. Use the *Import* command in the *File* menu. During the import process, choose the option *Rename with Citavi short title* to rename the imported pdf files.

b. Examine the imported records carefully.

Exercise 11 – Search for Full Texts

Select all titles with the keyword *Food Safety* in your Citavi sample project. Have Citavi search for full texts for the selected titles. (Toolbar: *Find full text*)

Exercise 12 – Adding Web Pages to Citavi Using the Citavi Picker (Incorrect Metadata)

Go to this website and add it as a new reference to Citavi: http://www.ox.ac.uk/news/science-blog/research-spotlight-supercharging-future

a. Compare the information given on the website with the information Citavi submitted.

Exercise 13 – Standardizing Author Names

a. Please open the list of *Persons and organizations*. Merge the entries for Manning, L. and Manning, Louise. Decide on one version of the name.

b. You changed your mind and want to change the name to Manning, Louise Linette. Change the entry in the list accordingly.

Exercise 14 – Show Subscribed RSS Feeds in Citavi's RSS Viewer

Go to the database *Scopus* and run a search. Save the enquiry as rss feed in Citavi (*Tools → Options → RSS / OpenURL → Feed URL).*

Exercise 15 – Task Planning in Citavi

a. Use the *Find library locations* function in the *Tasks & locations* tab to check whether the book *Real food fake food* by Larry Olmstedt is available at TUM university library.

b. Add a new task to this book to remember to order the book via interlibrary loan next week. Mark the importance of this task as high.

c. Compile a list of tasks. Show all tasks that are overdue or due within the next week (current tasks).

Exercise 16 – Citavi and LaTeX

a. Activate the TeX support in Citavi's *Options > Citation*. Choose a LaTeX editor as your default text editor.

b. Export a .bib file containing all references from your Citavi project.

c. Use the *Cite* button to insert a citation to your LaTeX document.

Lecture Notes on this course:
https://mediatum.ub.tum.de/node?id=1144896

TUM Citation Guide:
https://mediatum.ub.tum.de/1225458?show_id=1236069

Reference Management and Citation Consultation Service
In addition to our courses, we offer reference management consultations online and on site.
Further information: https://www.ub.tum.de/en/consultation-citation

This exercise sheet is regularly being updated. Should you notice that the information given is not up to date anymore or if you have any suggestions for improvement, please don't hesitate to write us: e-mail: workshop@ub.tum.de.

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