

Lecture Notes of the course
Reference Management with Citavi
- Advanced Course -



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We appreciate your feedback.

These lecture notes are being updated regularly. However, should you find that the information mentioned herein is not accurate or you have suggestions for further improvement, we would welcome an email to workshop@ub.tum.de.

These lecture notes were published via the following link: <https://media-tum.ub.tum.de/node?id=1144896>

1 Content of the Citavi introductory workshop

In Citavi introductory workshop the following themes, required for the Citavi Advanced Course, are covered:

- Incorporating **references**^{*1} in Citavi (rapid entry via **ISBN*** / **DOI***, manual entry, importing from a **database***, incorporating references with **Citavi Picker***)
- Displaying a reference list
- Working with the Word-Add-In (inserting references in a text document and creating reference lists in a selected **citation style***)

2 Adding references to Citavi

Citavi is fundamentally a reference management program. It allows you to organize, collect and edit your references. In the reference editor  References program area you have several options for including references in your Citavi-**Project***:

1. Manual input (introductory course)
2. Quick Entry via ISBN, DOI or PubMed ID (introductory course)
3. Using of reference lists that contain DOIs or ISBNs (introductory course)
4. Importing from a database (introductory course)
5. Importing with Citavi Picker (introductory course)
6. Searching library catalogs and databases using Citavi
7. Full text search with Citavi (chapter 2.2)
8. Importing PDF files (chapter 2.3)
9. Incorporating web pages with Citavi Picker (chapter 2.4)
10. Adding references via RSS feed (chapter 2.5)

2.1 Searching library catalogs and databases using Citavi

You can search library catalogs and **bibliographic databases*** using Citavi. However, you should note the following:

- It is only possible to search databases that are freely available on the web. You cannot access all the TUM licensed databases this way.
- Library catalogs offer additional information on availability of print or electronic resources and direct you to other results that may be of interest.

¹ Words printed in **bold** with * are explained in the glossary at the end of this document.

- Reference databases are often restricted access, and thus are not automatically available for searches using Citavi. Even where data sources are freely accessible, it is often the case that the search interface itself offers more opportunities for a targeted search than Citavi.
- In addition, Citavi only displays a limited number of hits and the criteria by which Citavi selects which hits are displayed or not are unknown.

A Citavi search therefore makes sense if you already know the data on a book or article that you want to include in your project, but you do not have the ISBN or DOI.

To start a Citavi search, click the *Online search* button . The *Online Search* window opens up (Fig. 1).

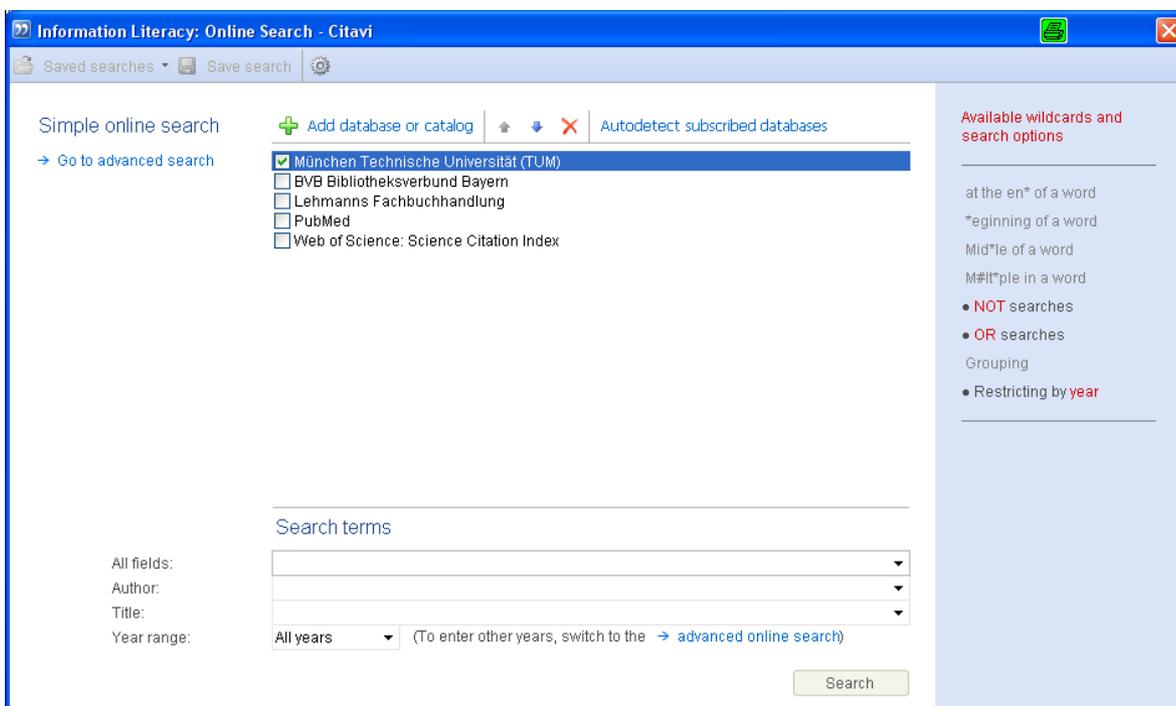


Fig. 1: Online Search

If the catalog or the book trade directory you want to search does not appear in the list, you can add approx. 4,600 additional data sources via the Add database or catalog button.

At the bottom of the window you will find search boxes for *All fields*, *author*, *title* and/or *year range*. If this selection of fields is not sufficient for your search, you can click on the link *Go to advanced search* (top left) or *advanced online search* (bottom right) to open a search form with more complex search options.

At the end of the search, results will all be listed in an import window (similar to the import from a database), so you can select the references you want and save them in your project.

2.1.1 Searching licensed databases via IP check

Citavi can search some of the databases licensed by the TUM. A search by Citavi is possible if the database provider permits Citavi access by IP check. Databases, which can be searched by Citavi, include Web of Science and Scopus.

To enable Citavi to search these databases ...

- ... **from home**: you have to establish a vpn connection to the TUM before starting Citavi. Here you can find out, how to do so: <https://www.it.tum.de/en/faq/it-services/internet-access-eduroam-vpn-wifi/internet-access-eduroam-vpn-wifi/how-can-i-configure-vpn-access/> ...
- ... **as a TUM staff member working on campus**: the TUM proxy has to be set.

How to set the TUM proxy in Citavi:

Menu *Tools* → *Options* → *Search* → *Proxy settings* → *Use this proxy*

Address: proxy.biblio.tu-muenchen.de

Port: 8080

User name: no entry

Password: no entry

Click *OK* and restart Citavi.

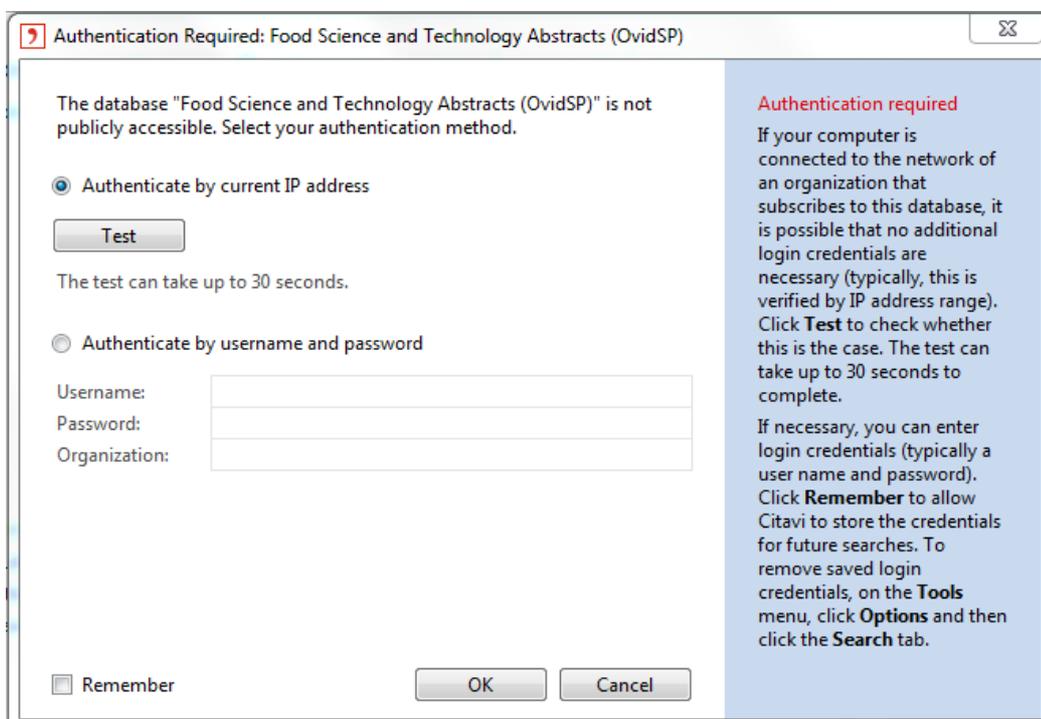


Fig. 2: Database search via IP check not possible

To start a search use the *Search* button, select a database and run your search. If Citavi cannot search the database, the following dialogue box appears, *Authentication Required* + name of the database (s. Fig. 2).

2.2 Find full text search

You can use Citavi to search for the full texts of journal articles that are freely available on the Internet.

In the *Reference* menu or the buttons bar, select *Find full text*.

In the *Find full text* dialog box that opens, select whether you want to search for full texts of journal articles and newspaper articles of all titles in the project, a pre-designated selection, or only the currently selected titles (Fig 3).

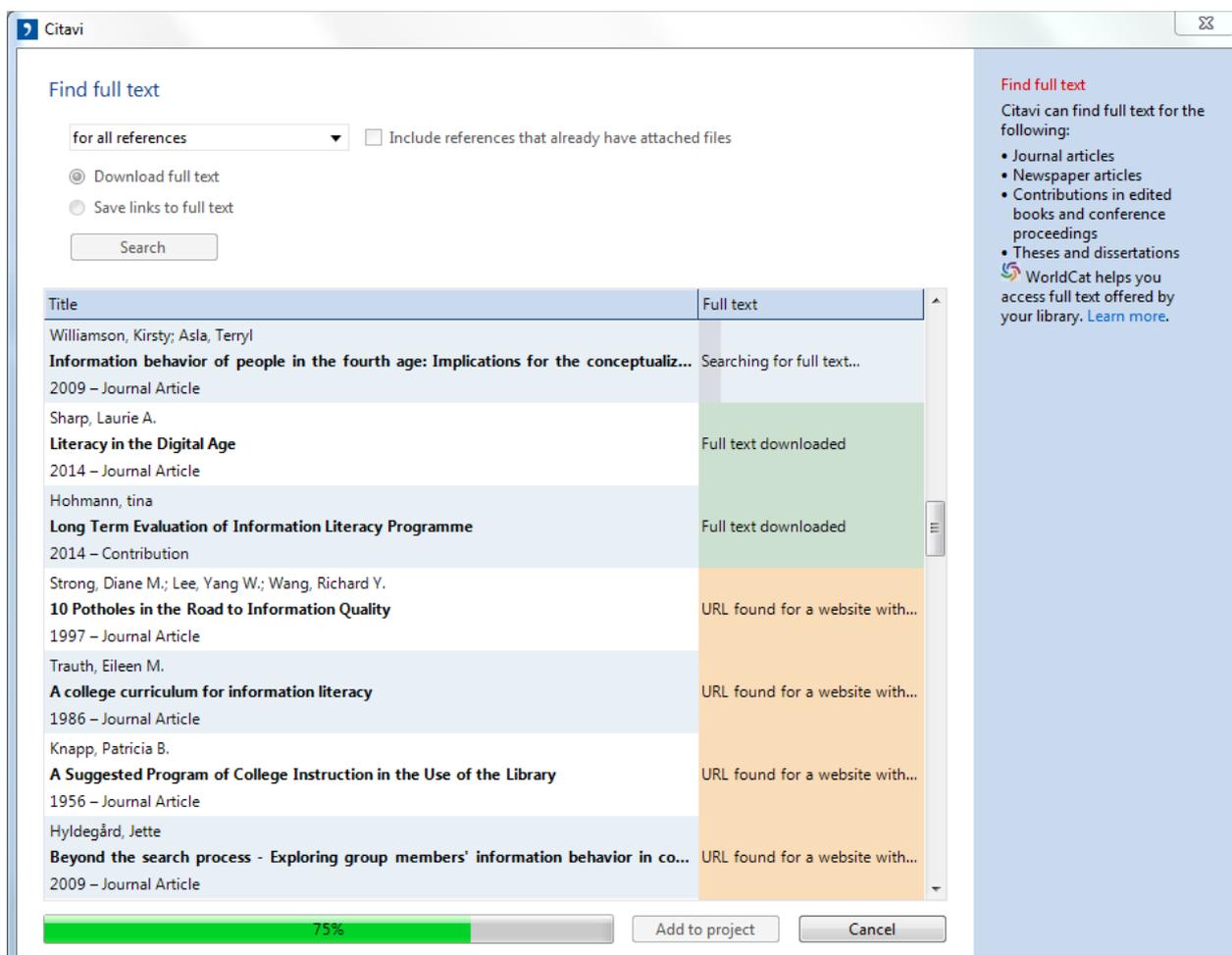


Fig. 3: Find full text in Citavi

Where Citavi finds a freely available full text, it will be set up as follows:

[Web] + URL + title of PDF file.pdf



Where Citavi finds a full text subject to license, this is indicated in the form of [Web] + URL.html

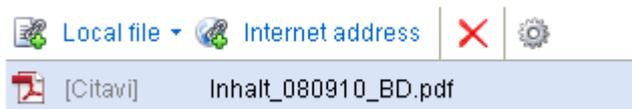


In neither case is the file stored on your computer. It is only linked to the full text on the Internet. To save free access full texts in your Citavi project, display the document in the preview window. In the header of the preview window (Fig. 4), a *Save as PDF* button will appear. (Until Citavi 4 a yellow bar appears with the message *Click here to save a copy of this document into the Citavi project*. Follow these instructions by clicking on the yellow bar.)



Fig. 4: Full text download in Citavi project

The document will then appear in the Reference tab in the following form: [Citavi] + filename.pdf.



2.2.1 Searching for full texts licenced by TUM

If you wish to search for full texts licenced by TUM enter the following links in the Citavi settings via the *Tools* menu → *Options* → *RSS / OpenURL* (Fig. 5)

OpenURL: http://sfx.bib-bvb.de/sfx_tum

EZproxy URL: <https://eaccess.tum.edu>

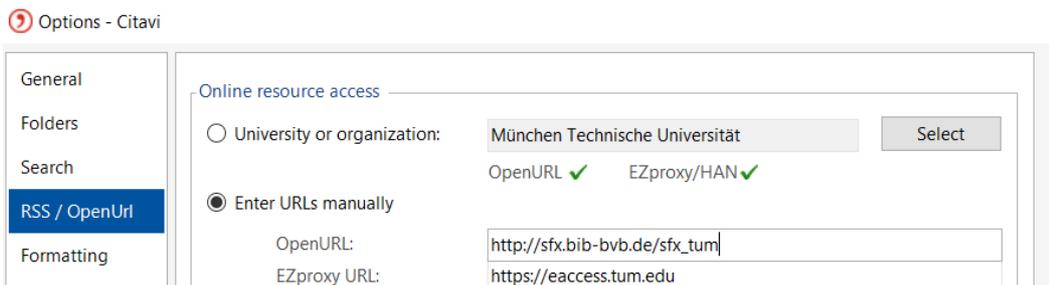


Fig. 5: Adding links to search for TUM licensed full texts

If you use the *Find full text* function, a link to *Log in to https://eaccess.tum.edu* will now be offered (Fig. 6) where you can log in with your TUM ID (TUM e-mail address + password). Press *Login*.

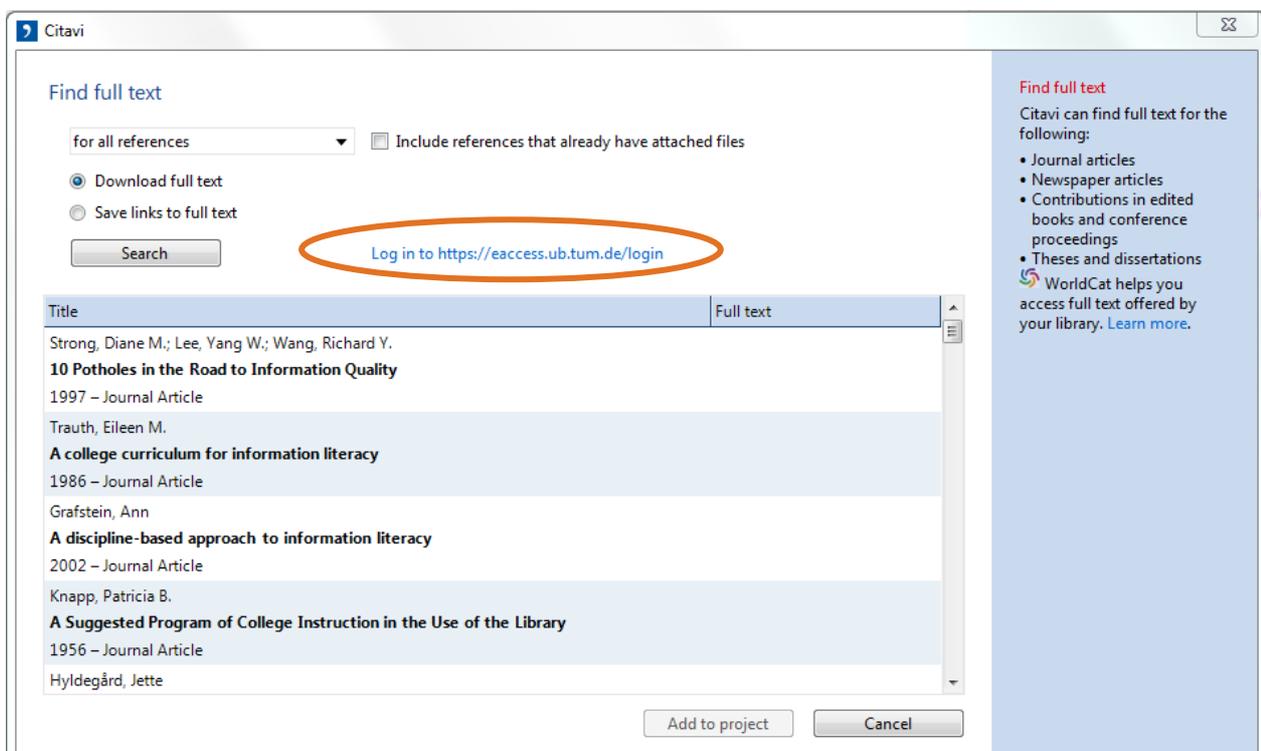


Fig. 6: Login for full text search for TUM licenced material

After the login you can close the login window and start your full text search. Please remember that this is no guarantee that you will find all full texts licensed by TUM. Also the search will take considerably longer.

Please keep in mind, that downloading full texts in a bulk is prohibited by copyright law and may result in a total block on database access for all TUM members.

2.3 Attaching, importing and renaming PDFs

Often one has interesting articles stored as PDFs somewhere on the computer already. Sometimes these are individual files, sometimes entire folders. You may attach these directly in Citavi and replace the often cryptic file names by a descriptive name – the Citavi short title.

2.3.1 Attach PDFs to existing records in Citavi

To attach a PDF file to an existing reference record, there are several options (Fig. 7):

1. In the reference tab
2. In the preview window
3. With drag and drop

1. In the Reference tab (blue labels)

Select the appropriate reference and open the Reference tab. At the bottom of the window, select *Local file* and browse to the file to attach on your computer.

2. In the Preview window (orange labels)

Select *Add local file* in the preview window and select the file to be inserted on your computer.

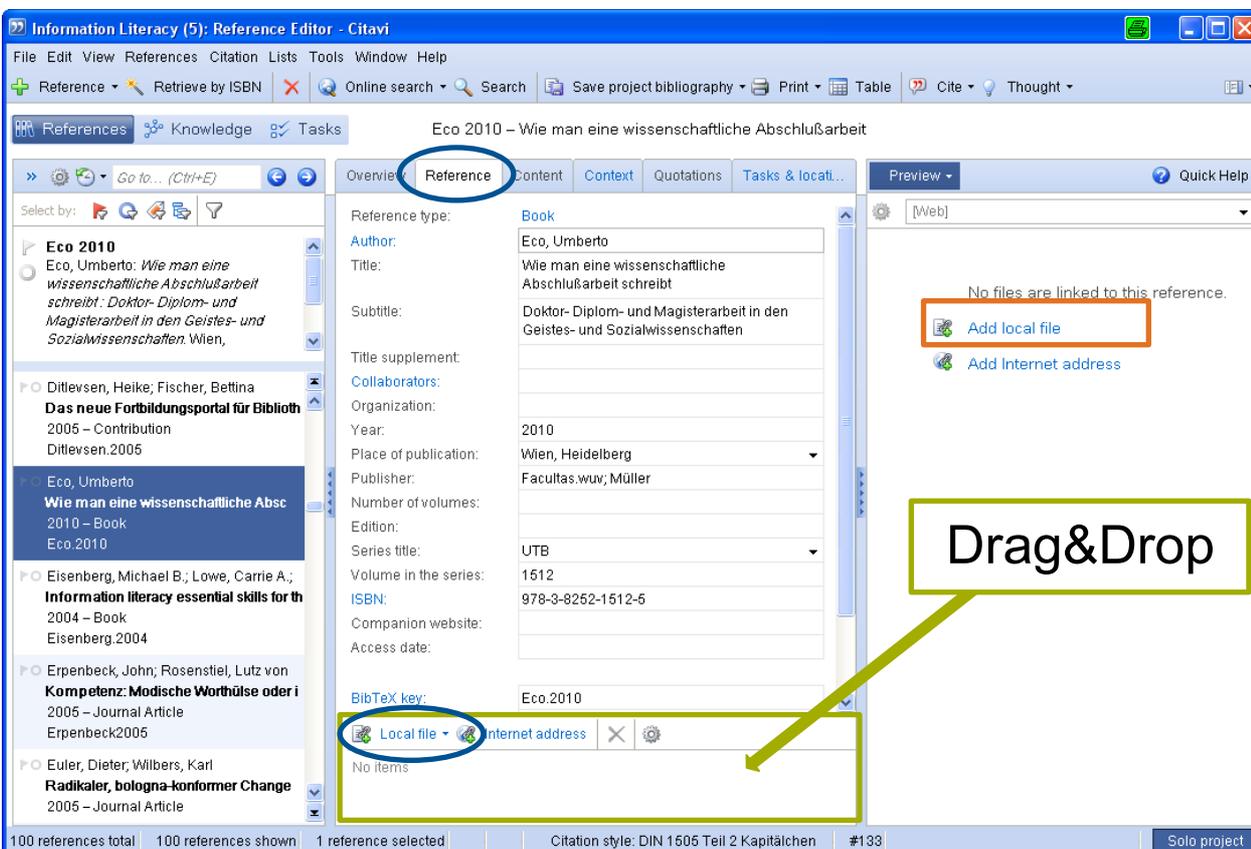


Fig. 7: Import PDFs

3. With drag and drop (green labels)

Select the appropriate reference and open the Reference tab. Select the desired file(s) on your computer and drag and drop it/them into the lower part of the Reference tab.

2.3.2 Importing individual PDFs or entire folders

If you have already conducted a research and saved articles as PDF files on your computer, you can now integrate these into your Citavi project. Citavi allows you to import both individual files and entire folders.

1. Go to *Import* in the *File* menu.
2. In the dialog window *What is the source of the data you want to import?* select *PDF files*.
3. In the dialog box *Source for PDF import*, select either *Single file* or *Folder of files*.
4. In the *File options* area, you can determine whether files are to be moved, copied, or linked. Generally, it is advisable to copy them into the Citavi project. Additionally, you can replace the file reference with the Citavi short title during import. The Citavi short title consists of author, year and title, and may thus be more meaningful than some of the filenames for downloaded files.
5. In the next dialog window, all PDF files located by Citavi in the selected folder are displayed. At this point you can remove unwanted files. Then go to *Next*.
6. In the following final dialog window you can see the bibliographic data Citavi was able to locate for the PDF files. This could look e.g. like this (Fig. 8):

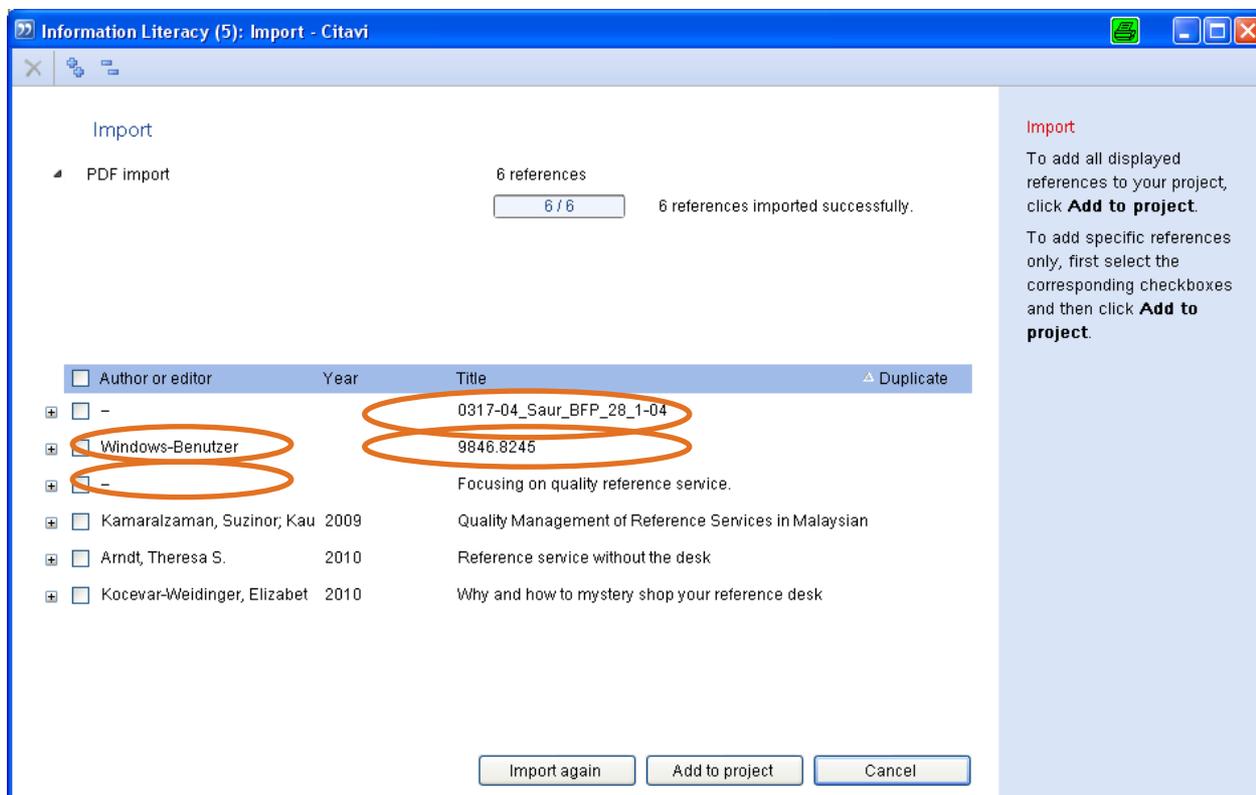


Fig. 8: Importing PDF files

For some files no authors or titles could be located. These will need to be reworked manually.

How does Citavi assess data?

If Citavi locates a DOI, it searches through the service CrossRef for the bibliographic information on the article. In addition, the metadata on the PDF file will be assessed. However, in many cases this may not be very helpful. Thus, for example, the author name in Figure 8 is "Windows user".

Check your data carefully, therefore, when importing.

2.3.3 Renaming PDF files

PDF files that you download frequently have unintelligible names such as "9846.8245.pdf" (Fig. 8). Citavi allows you to replace this file name with a Citavi short title, which consists of the information on the author, year of publication, and title.

Replacing the title during import using Citavi short title was explained in the previous section. You can repeat this procedure for titles already included in your project:

1. Option: go to the *Reference* menu and click *Change short title*
2. Option: Click the cog at the bottom of the *Reference* tab (Fig. 9). Select *Rename files with the Citavi Short title ...*

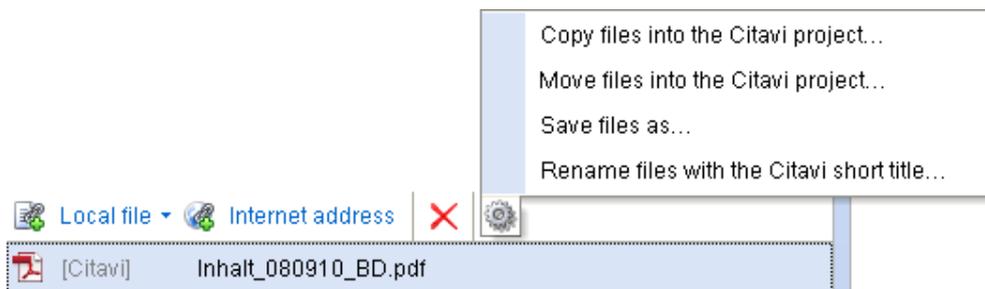


Fig. 9: Renaming PDF Files

From the following dialog box select whether only a single file, all files in the selected record or all the files in the project are to be renamed (Fig. 10).

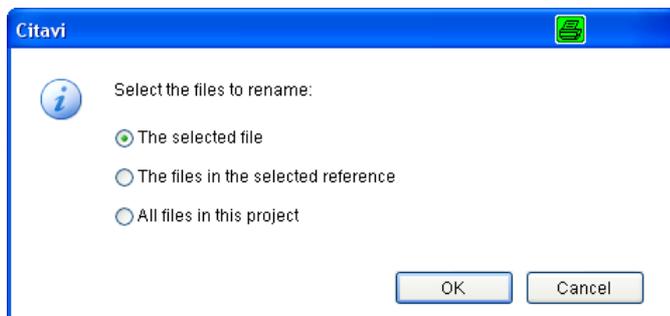


Fig. 10: Renaming PDF files II

2.4 Incorporating web pages with Citavi Picker

Citavi Picker enables you to incorporate web pages comfortably. If you right-click on the web page that you wish to add to your Citavi project, a context menu will open (Fig. 11). Choose *Citavi Picker* and *Add web page as reference* and the website will be incorporated as an Internet document in your project. Citavi does this using the metadata stored on the web page. This means that you may have to correct or complete the data. Therefore it is best always to check all fields.

A special feature in Wikipedia: Citavi always stores two Internet addresses: one at which you can always find the current version of the article and another at which the article was accessible at the time of inclusion in your Citavi project. It is important always to specify the version from which the quote was taken.

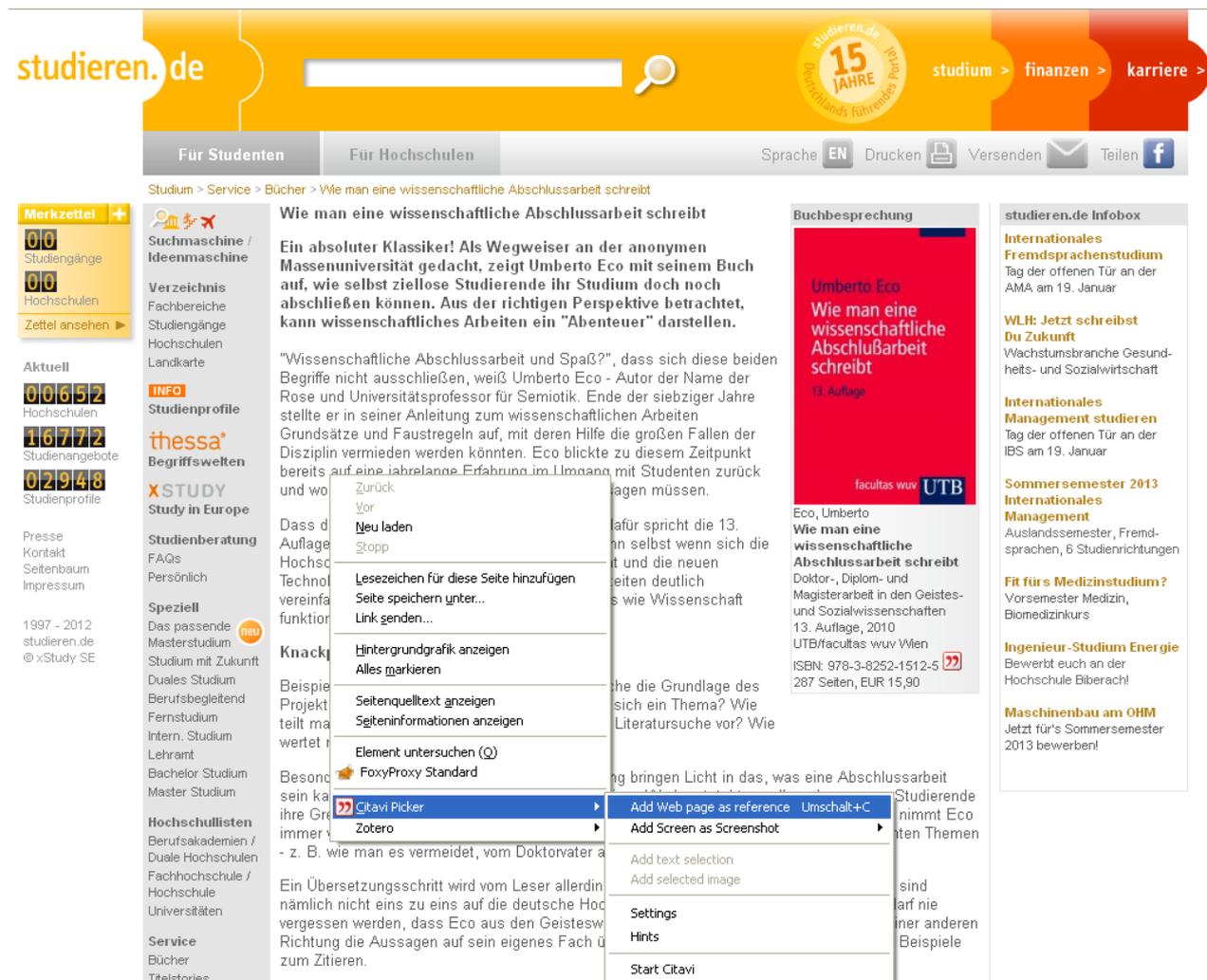


Fig. 11: Incorporating web pages using Citavi Picker

2.5 RSS feeds

RSS feeds keep you informed about new posts on a website, new articles in a journal or new articles regarding your research topic in a database. Citavi offers an integrated RSS reader. New RSS feeds are displayed on the Citavi welcome screen on the right (s. Fig. 12).

Save the feed URL in Citavi to subscribe to new feeds. To do this follow the link *RSS tools* link on the bottom right of your Citavi welcome screen or open the *Tools* menu, go to *Options* and choose the tab *RSS/OpenURL*.

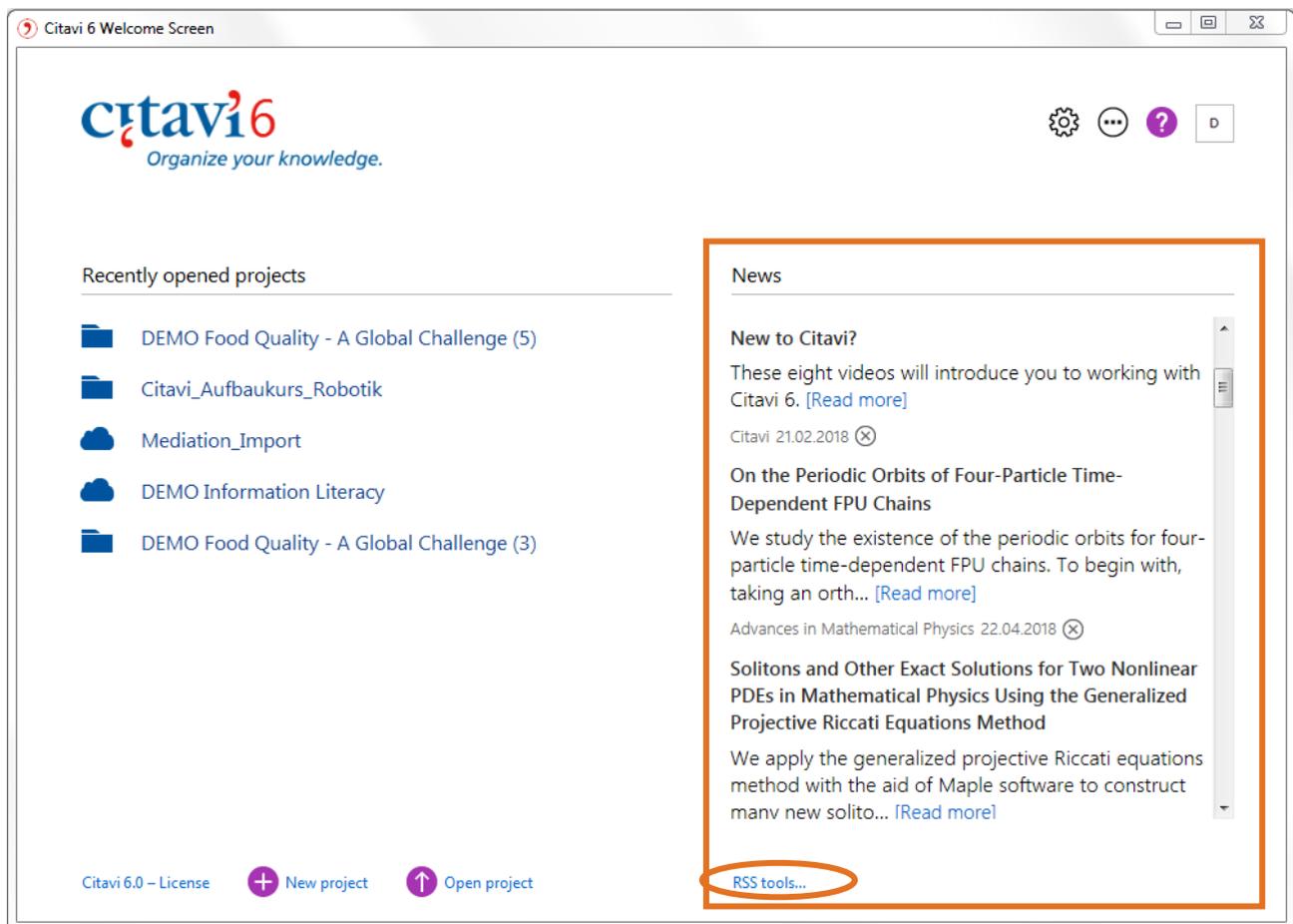


Fig. 12: Citavi welcome screen with RSS feeds

Where do I find the feed URL?

If a database or website offers RSS, this is indicated with this icon . To subscribe to an RSS feed follow this icon. In most cases, a page like the following (s. Fig 13) opens up.

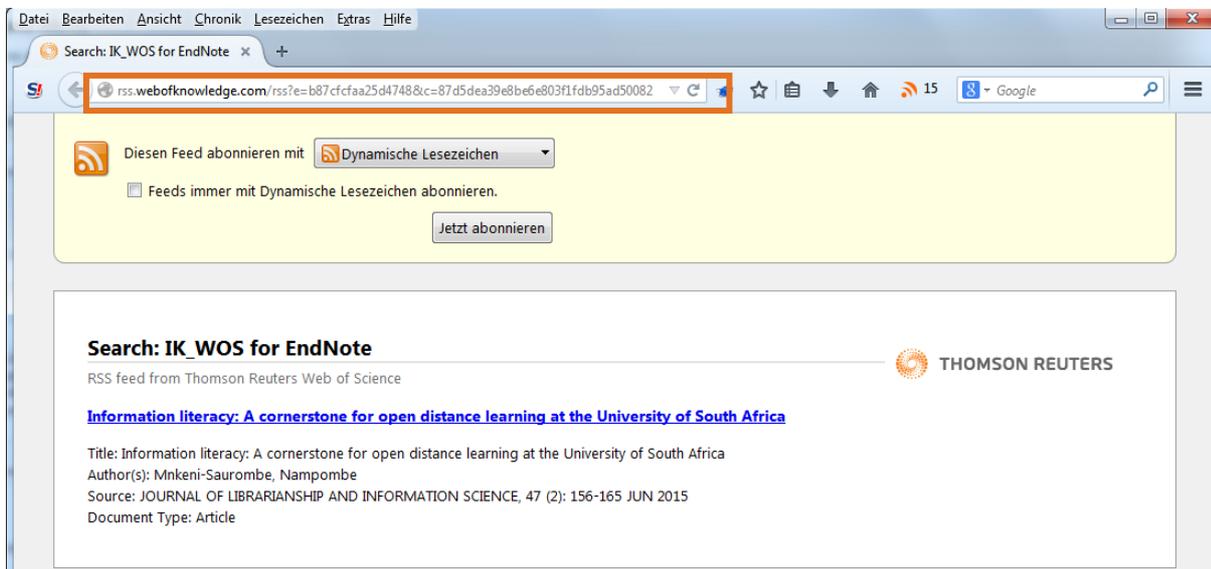


Fig. 13: RSS feed in Web of Science

Copy the URL and paste it into the field *Feed URL* in the RSS options (s. Fig. 14) and click *Add*. The RSS feed is saved / subscribed to. From now on you will be notified about new post and articles on your welcome screen in Citavi.

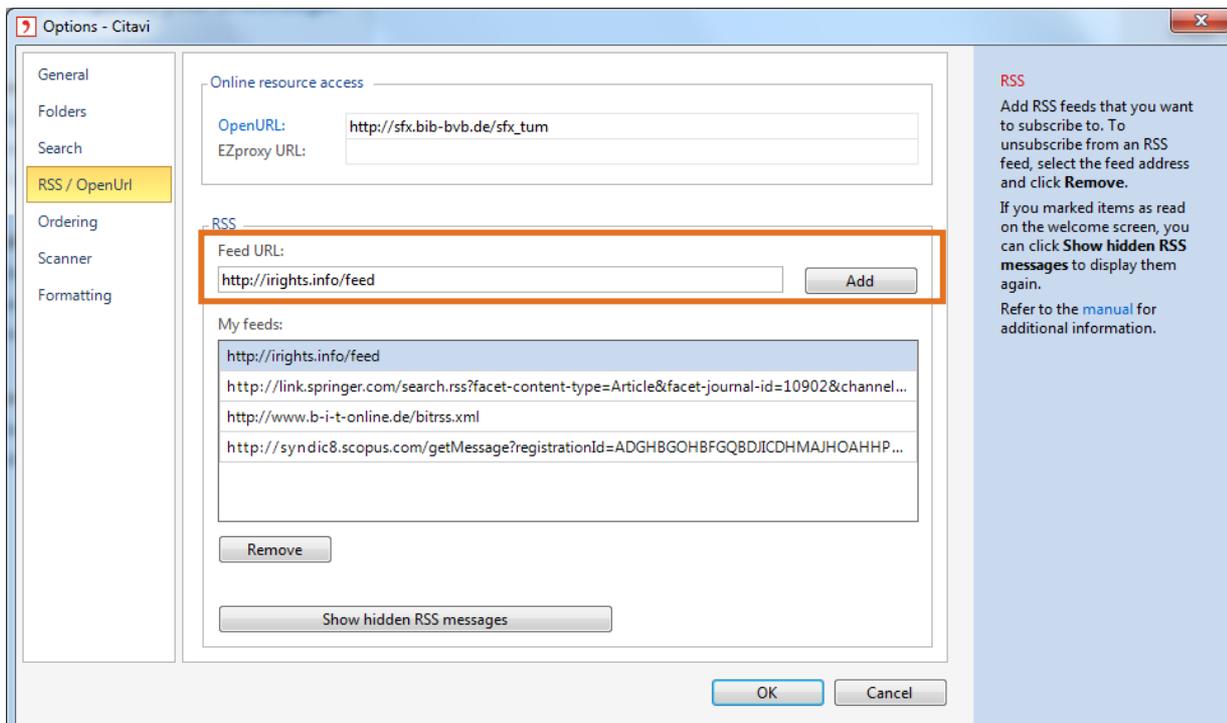


Fig. 14: Entering a feed URL into

If you want to subscribe to a search query, you might be asked to name your query before the feed URL is displayed. This helps to distinguish between different search queries in the same database.

3 Organizing quotations and references in Citavi

Knowledge organization  Knowledge is the central program area if you want Citavi to give assistance when writing your work. This enables you to capture content along with the references that you have accumulated.

The following useful features will help you to organize the references that you have included in your Citavi project, and to keep track of them:

- Keywords
- Categories
- Groups
- Labels
- Filters
- Search options
- Table View

3.1 Keywords, categories, groups, labels, filters & search options

Keywords

Keywords can be assigned to each reference in the context tab in the middle of the window. Keywords are usually content descriptive terms, a table of contents in single words if you will. All terms that you have entered in your project as a keyword will be saved. Once you start entering a new keyword in the keyword box, a list of all previously assigned keywords appears. You can - as described above - filter and search by keyword.

Categories

The Citavi categories are a good tool to map the outline of your scientific paper. To have a good overview on how much literature you have collected for each chapter already, assign the categories in which you want to cite your literature to each source.

Moreover, you have all references you want to cite in one chapter at a glance when writing on a chapter. You can assign as many categories to one reference as you like.

Groups

Groups in Citavi work the same way keywords do. Like keywords groups are not hierarchical. The group names can be managed in the corresponding list, just as with keywords.

Unlike keywords, you can use groups not just to organise your references according to subject but to any form of category you would like. You could use groups to document your progress or your next task (e.g. acquire, read, excerpt, check) or to mark the relevance of your citations (important, negligible, contradictory, etc.). In addition to that they can serve as grouping criteria (chapter 4.4).

Labels

For marking your references, you have two labels to choose from: red labels (flags) and blue labels (hoops) . The meaning of these labels is not predefined - you can define them for yourself. To assign a flag or a loop to a reference, or to remove the label, left click in the reference list on the appropriate icon. If the labels do not appear in the reference list, you can insert them using the *Show labels* command, which appears when you click on the gray cog in the upper left navigation pane in the reference list.

Filter

The filter function can also be found in the navigation pane top left. Above the icons and create a selection of references that you have assigned to one of the labels. Using the icon you can filter references by keyword; the button is used to list all the references that you have classified into a specific **category***. Clicking the filter symbol will make further criteria available by which you can display sources from your reference list. You can, for example, filter by reference type or author.

Search options

Using the button you can search your project for references that match specific criteria. In the window that opens when you click this button, you have a quick search with a search field and an advanced search option available. Using the advanced search, you can restrict your search to certain fields (e.g. author field, reference field) and combine your search criteria to create a complex search query (Fig. 15).

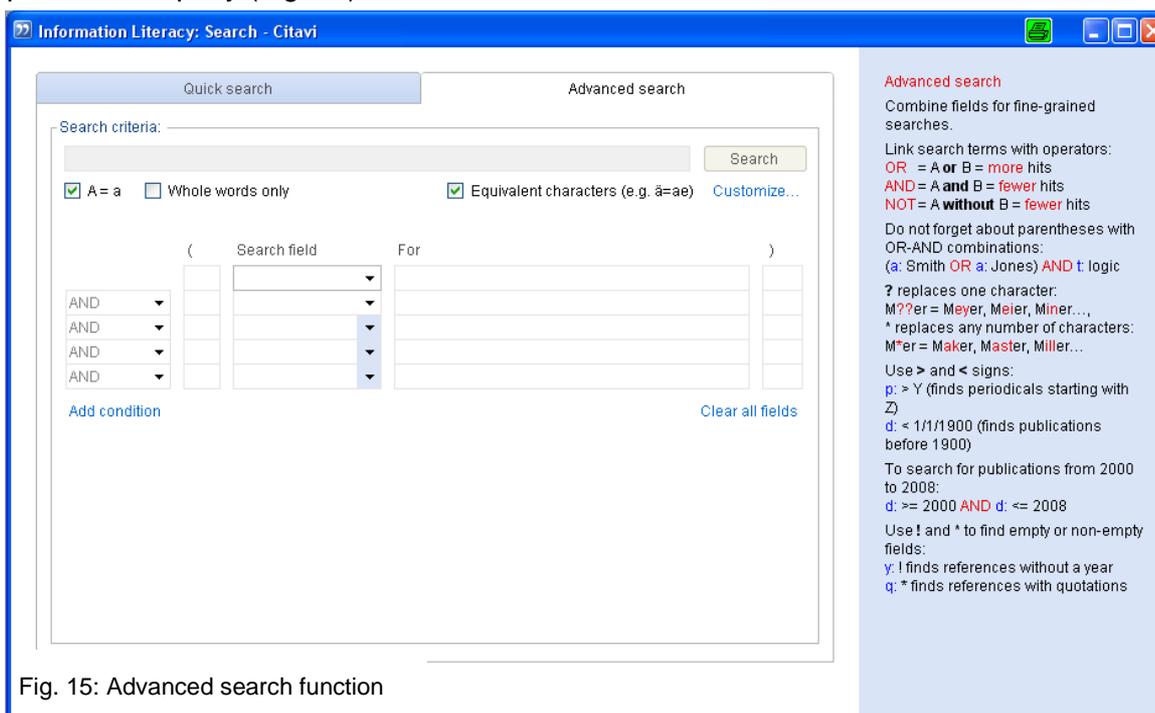
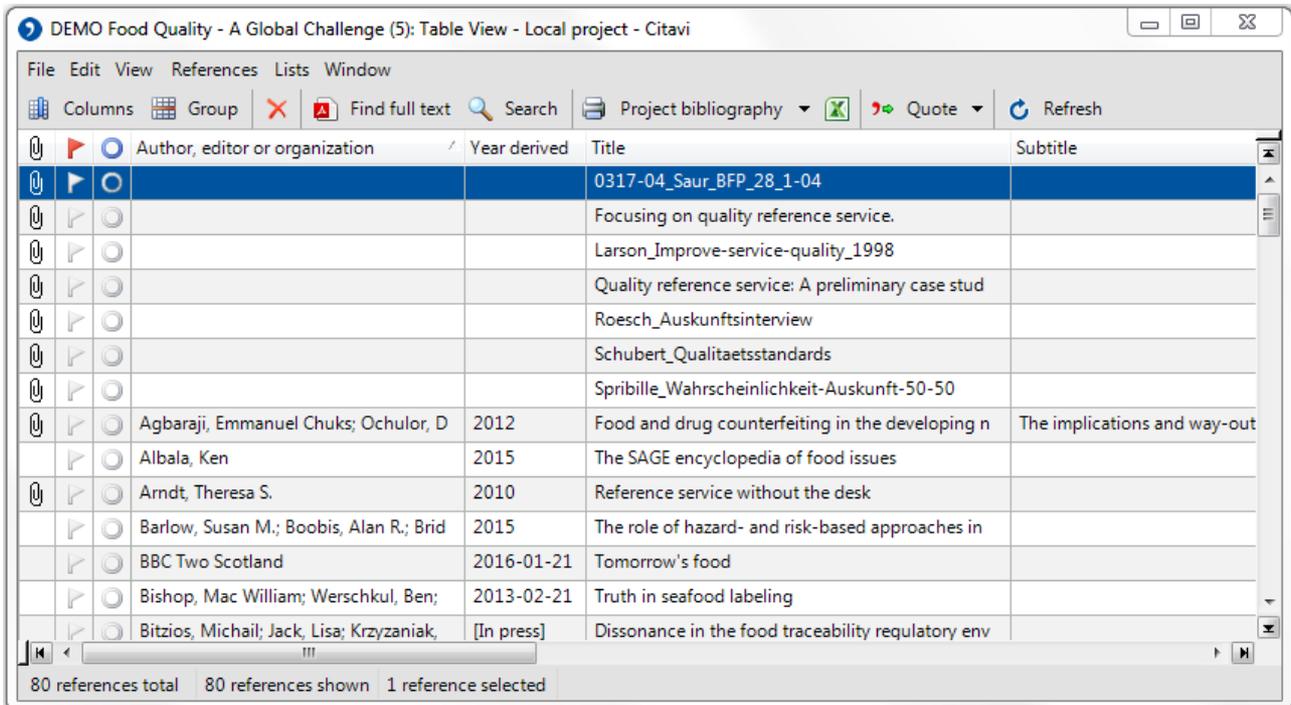


Fig. 15: Advanced search function

Table View

Clicking on the  **Table** button will open a new window in which the most important data about the references in your project are displayed in tabular form. You can organize the display according to your own requirements. You can add or remove columns and assign labels. The table view can be exported to Excel (Fig. 16).



DEMO Food Quality - A Global Challenge (5): Table View - Local project - Citavi

File Edit View References Lists Window

Columns Group Find full text Search Project bibliography Quote Refresh

Author, editor or organization	Year derived	Title	Subtitle
		0317-04_Saur_BFP_28_1-04	
		Focusing on quality reference service.	
		Larson_Improve-service-quality_1998	
		Quality reference service: A preliminary case stud	
		Roesch_Auskunftsinterview	
		Schubert_Qualitaetsstandards	
		Spribille_Wahrscheinlichkeit-Auskunft-50-50	
Agbaraji, Emmanuel Chuks; Ochulor, D	2012	Food and drug counterfeiting in the developing n	The implications and way-out
Albala, Ken	2015	The SAGE encyclopedia of food issues	
Arndt, Theresa S.	2010	Reference service without the desk	
Barlow, Susan M.; Boobis, Alan R.; Brid	2015	The role of hazard- and risk-based approaches in	
BBC Two Scotland	2016-01-21	Tomorrow's food	
Bishop, Mac William; Werschkul, Ben;	2013-02-21	Truth in seafood labeling	
Bitzios, Michail; Jack, Lisa; Krzyzaniak,	[In press]	Dissonance in the food traceability regulatory env	

80 references total 80 references shown 1 reference selected

Fig. 16: Table view

3.2 Creating and managing categories

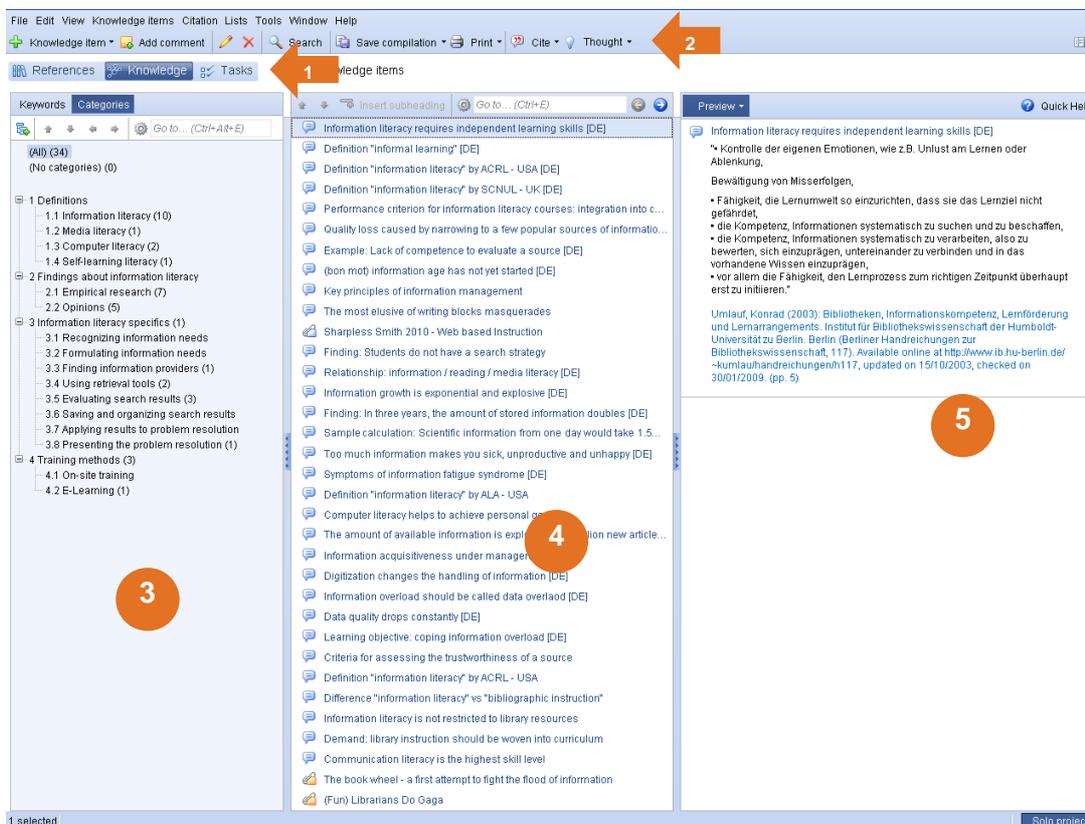


Fig. 17: Program area Knowledge Organization

1. Toolbar in the program area knowledge organization

When changing program areas (Fig. 17, 1), the buttons that are offered in the toolbar will also change (17, 2).

2. List of keywords, categories or groups (left column, Fig. 17, 3)

As with the reference list in the reference management program area, in the left pane of the knowledge organization a list of categories will be shown (Fig. 18). The categories structure your knowledge items* and can, for example, map the structure of your work. Obviously, in a new project, no bullet points will have been created. Using the buttons at the top of the column you can insert new bullets , and in the categories available, change the order  as well as level of bullets ( promote,  demote). The knowledge items that have been assigned

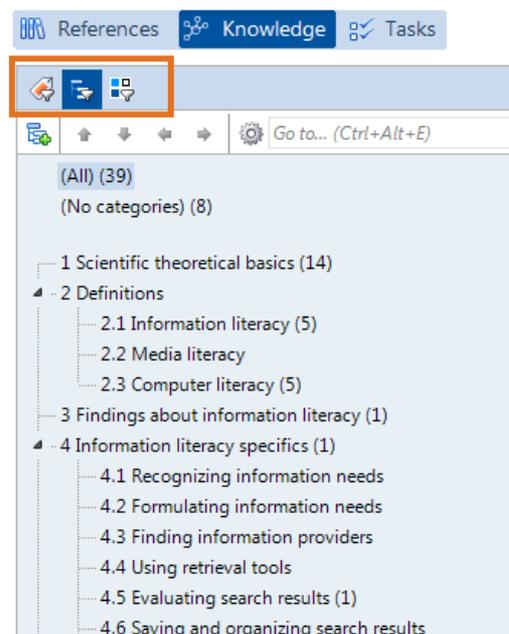


Fig. 18: List of categories

to a category are moved at the same time. The numbers behind the bullet points indicate how many knowledge items have been assigned to a category.

In addition to sorting by categories, the collected knowledge items in the left column of the program area are also sorted by keywords or group. Click in the column header on the keywords or groups icon.

3. List of knowledge items (middle column, Fig. 17, 4)

In the middle column, the accumulated knowledge items will be displayed according to the selected category. Again, you can change the order of entries . Additionally, the  button can organize your knowledge items by subheadings.

4. Preview (right column, Fig. 17, 5)

In the preview area, the contents of the knowledge item are displayed.

3.3 Recording and assigning categories to knowledge items

Citavi recognizes seven different types of knowledge items. Five knowledge items are directly related to a source:

- **Direct quote** *  Direct quotation...
Text is taken unchanged from source
- **Indirect Quote** *  Indirect quotation...
Text is paraphrased
- **Summary**  Summary...
Main points of a text
- **Comment** *  Comment...
Either the source itself or another knowledge item is commented on
- **Image or file citation**  Image or file...
A digital or digitized image or file (from source) referred to

The other two knowledge items are independent of a particular text. Using them, you can retain your thoughts and ideas about content.

- **Thought** * (text)  Thought
Note down the ideas that come to you in the course of your work
- **Thought (image or file)**  Thought (image or file)
Capture a link or an appropriate image

The  button, which allows you to incorporate text, image or file citations, is included in each part of the program as the last item on the toolbar.

You can create new knowledge items, connected to specific references, in three places:

1. The  Knowledge item button in the toolbar of the knowledge organization program area. If you choose this route, first select the reference to which you refer.
2. The *Knowledge items* menu (only in the knowledge organization area).
3. In the reference management program area for each reference in the tab *Quotations* (middle column).

The window that appears when you want to incorporate a new knowledge item is the same for all knowledge items (Fig. 19). In the following screenshot the example of the knowledge item

 Indirect quotation... is shown.

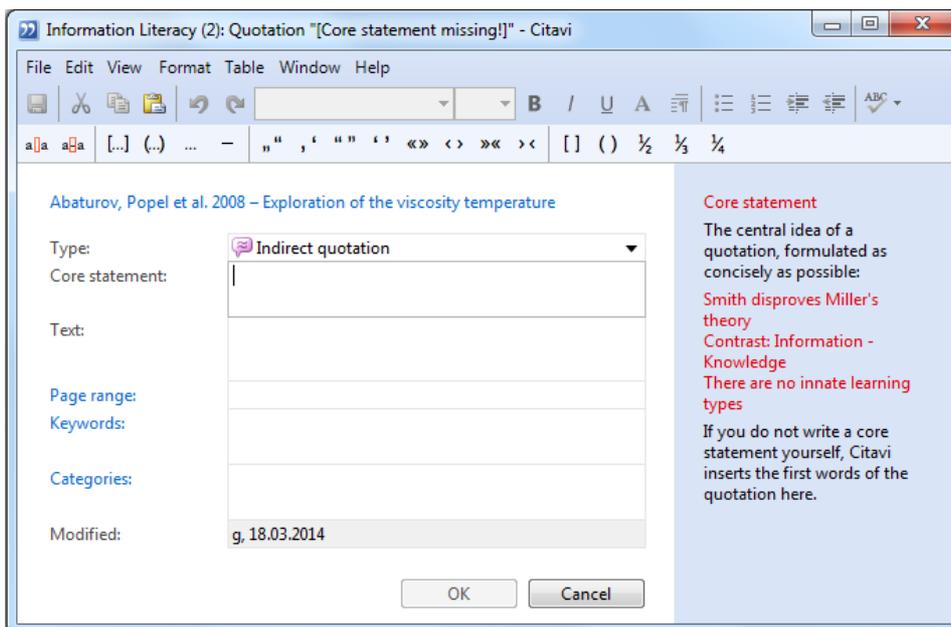


Fig. 19: Incorporating knowledge items

The window is made up of different fields:

- First of all you will find the short verification of the reference, to which the quote is connected. This does not happen when including a *thought*
- The type of quotation which you can change at any time later.
- Core statement: The core statement is the name given to the particular knowledge item and appears in the middle column of the knowledge organization program area . If you do not write a core statement yourself, Citavi inserts the first words of the quotation here.
- You type the actual text in, either by hand or by copying it into the field. You can then edit it further. Some options are directly available to you in the toolbars at top of the window: You can add brackets or ellipsis, or change the font.
- **Please note:** You must insert quotation marks for direct quotations yourself; they will not be inserted automatically!
- In many citation styles, the citation is specified in the text with the page number from which a quotation is taken. In addition to page numbers, column numbers or paragraphs can be entered. Instead of Arabic numbers, letters or Roman numerals may be used. This adjustment can be made by clicking on *Page range*.

- **Keywords:** Assign keywords to your knowledge item. In the knowledge organization program area, you can show your knowledge items sorted by keywords. Once keywords have been incorporated in your project, you can look them up by clicking on keywords.
- **Categories:** Specify where in your text a quotation is to be assigned. If you click on the term categories, a new window opens with all previously created categories.
- **Groups:** Sort your quotations into groups. When creating a new group you will be asked, whether you want to create the new group for your literature, your quotations or for both.
- You can assign a knowledge item to as many categories and subcategories as you wish.
- The field *Modified* is automatically loaded with your initials and the date of the last modification.

3.4 Annotating PDFs in the preview window

Text passages and images to be saved as knowledge items can also be generated from the preview of the document in the reference management program area (Fig. 20).

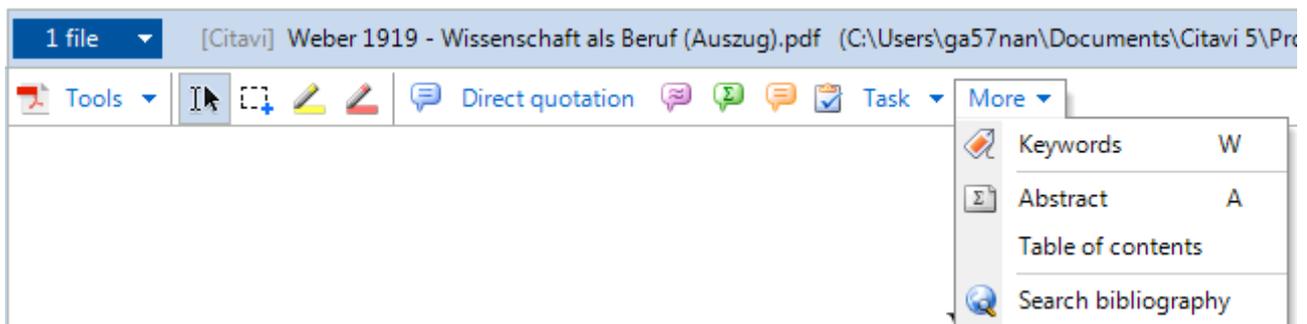


Fig. 20: PDF annotations in Citavi's preview window

Here you have the following options for processing content (Fig. 17, left to right):

- Text selection
- Snapshot tool
- Highlighter (yellow): Highlights text without saving it as a knowledge item
- Highlighter (red) / quick quotation saver: Highlights text and saves it as knowledge item without saving the exact content. The location of the quotation will be saved including the core statement but without the actual quotation text.

Having marked a passage, it can be saved as:

- Direct quotation
- Indirect quotation
- Summary
- Comment
- Task
- Abstract
- Keyword

- Table of contents

More information on how to analyse PDFs with Citavi is available here: https://www.citavi.com/media/1341/citavi_6_analyzing_pdfs.pdf

3.5 Standardizing entries

Different databases often store data in a variety of forms. It may happen, for example, that when importing from one database, the name of a particular journal appears in full, whereas another database may provide you with a reference for the same journal, but only in an abbreviated form. In your reference list at the end of your work these differences must be rectified. Citavi manages the terms of some input fields in **lists** *.

You will find the automatically created directories in the menu bar under *Lists* (Fig. 21):

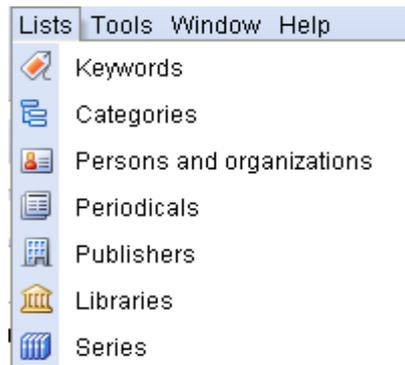


Fig. 21: Available lists

In the lists, incorporated items are displayed in alphabetical order. In the following we deal with the list of *Persons and Organizations* (Fig. 22). All other lists are edited analogously.

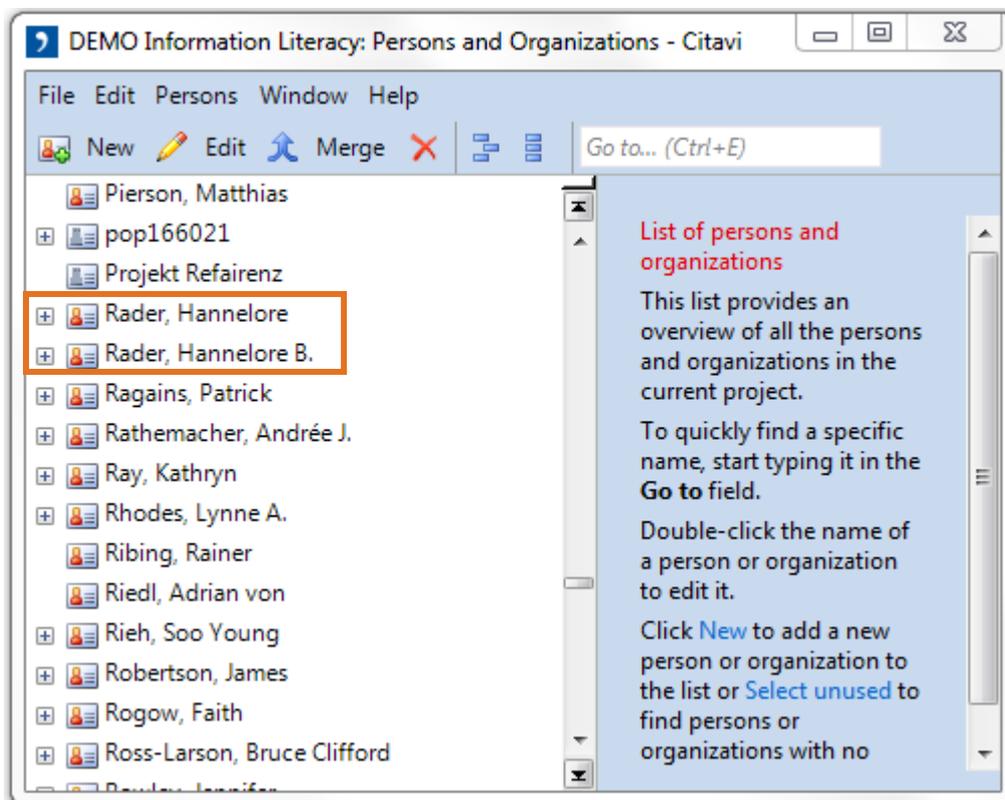


Fig. 22: Lists of persons and organizations

In the list view, you can add new entries using the  button. To complete or correct information in existing entries, select them with the mouse and click . Please note: If a citation style requires that first names should be given in abbreviated form, Citavi implements this automatically. There is no need at this stage to make a correction to the name as written!

The , which you see in front of many entries, indicates that references are connected to this entry. When you click on this icon, the respective references appear.

If there are two entries for the same person (as in the example above: Rader, Hannelore and Rader, Hannelore B.), you can merge the two names into a single entry. Mark the corresponding entries with the mouse (select multiple entries by holding down the CTRL key on your keyboard) and then click . In the window that opens you define the form in which the names should be merged – subsequent re-editing is possible at any time. All references that are affected by the name merge will be corrected automatically.

Useful add-ons:

- Correct author names in all caps
- Import journal abbreviations

4 Referencing in Word

4.1 Inserting quotations in Word

You can insert your quotations into your manuscript by and by. To do so you use the Word add-in just like when citing references. The basic use of the Word add-in was introduced in the Citavi introductory course.

In the Word-Add-In the contents of your project are organized in four tabs (Fig. 23). Using the *Reference* tab, you will find the list of all sources so that you can insert references into your work with a single click. In the *Knowledge* tab, you find all quotations, comments and ideas you saved in your project. As with references, you can now insert knowledge items into your work with a single click or using the button *Insert*. The text of the quotation or thought appears in its final form and may be edited safely. Only field codes, which indicate the source of a reference – cannot be changed.

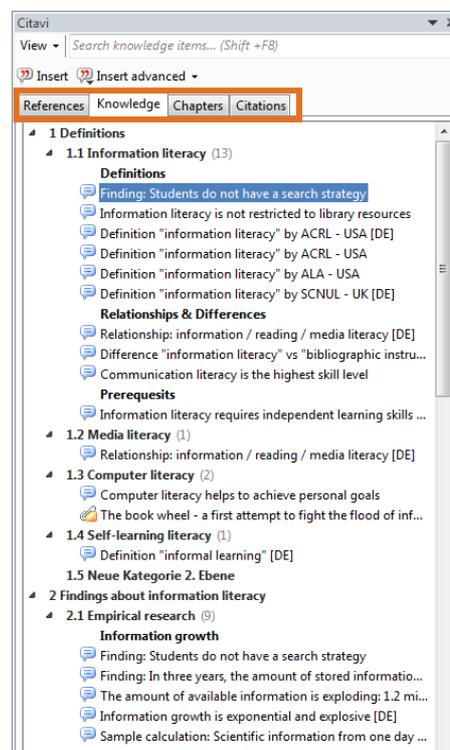


Fig. 23: Word-Add-In

If you would like to add information to your citation, e.g. page numbers, you can do this by using the button *Insert advanced* (see Fig. 24). In the menu that opens, you can add page numbers to the field *Page range*. Additionally, you can change the display of your citation in your text. You might for example want to refer to your source in an introductory sentence as *Person (Year)*, excluding the author's name from the brackets.

4.2 Im-/exporting outlines

The categories in the program area *Knowledge Organizer* in Citavi are well suited to reflect the outline of a scientific paper. Whether you have created your outline in a text document and now wish to import it to Citavi or have created a category system in Citavi that you want to export to your text document, both are possible.

4.2.1 Importing outlines

In the *Knowledge Organizer* program area, go to the *Categories* view.

Click on the small cog and then on *Import category system*. Specify where you want to import your category system from, e.g. a Word document, and then select the appropriate document on your computer.

All categories that are not already in the project will be imported. This means that existing categories will remain in the Citavi project, and new ones will be added at the end of the list. If you have created, exported, and changed your category system in Citavi, and now import it again, category name changes will not be adopted as Citavi will not recognize them as already existing categories. The renamed category is considered new and attached along with other new categories at the end. For this reason, it is advisable, if you want to edit a category, to do so in Citavi and insert this category again into your Word document.

The prerequisite for importing a Word outline as a category system is that headings in Word are formatted as headings.

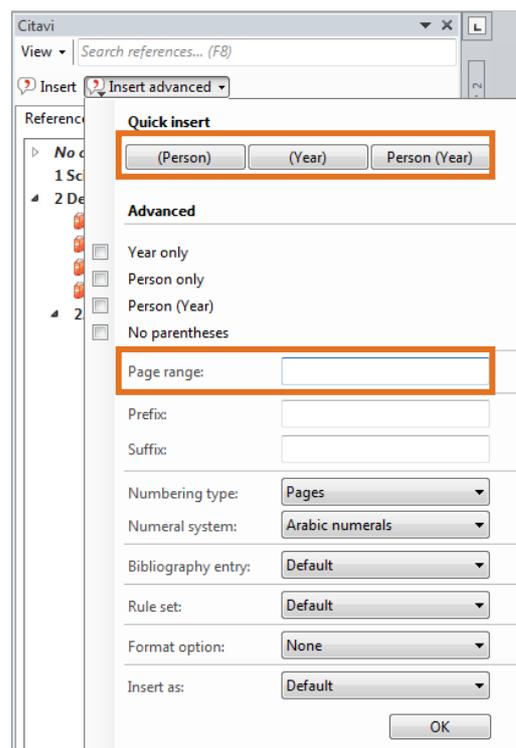


Fig. 24: Inserting citations and sources with additional information

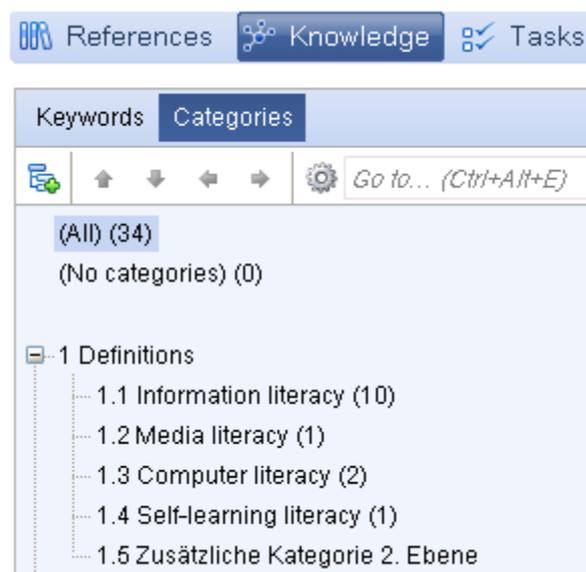


Fig. 25: Categories in the knowledge organisation area

4.2.2 Exporting Categories

The categories in Citavi can be exported to Word, OpenOffice Writer, ConceptDraw, Freemind and Mind Manager for further use as an outline. To export your categories from Citavi, go to the program area *Knowledge Organizer* in the *Categories* view. Click on the small cog and select *Export category system* and e.g. ... to Word.

Via the Word-Add-In, you can insert your categories more easily into an open Word document. To do so, go to the *Reference* tab and select a category. Right-click to open the context menu. In the context menu, choose *Insert categories and knowledge items* *All categories* without selecting any further options. Alternatively, you can export categories from Citavi directly, which automatically creates a new Word document.

4.3 Creating Citavi compilations - From idea to text

You can display all collected knowledge items, or a selection of them, in a document that can, for example, serve as a basis for your work. When suffering from writer's block, this feature can serve as a useful way of overcoming the daunting "blank page".

To do so using the Word-Add-In open the *References* tab, choose a category and right click to open the context menu. Choose *Insert Categories and knowledge items* *All categories* and one or more of the following options: *Include knowledge items*, *Include core statements*, *Exclude categories with no knowledge items* (see Fig. 26).

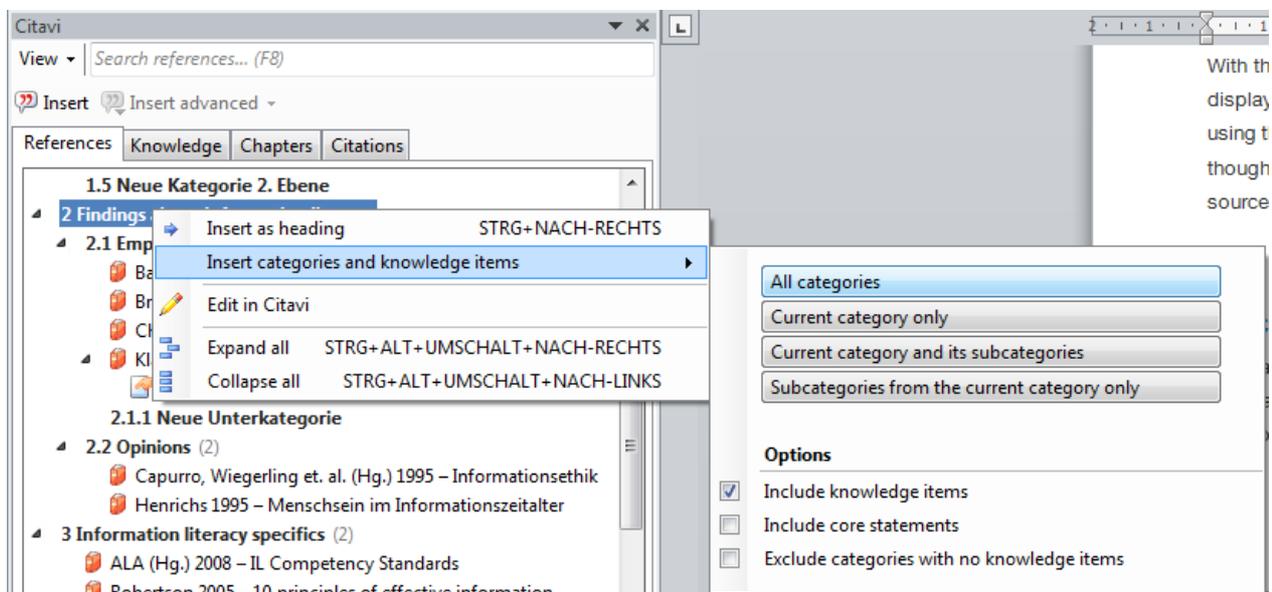
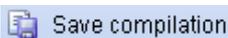


Fig. 26: Inserting citations and sources with additional information

Another way to do so is to click the  *Save compilation* button in the knowledge organization program area. Clicking the small black arrow next to the button you can also save your script *With options ...*

The document, which is now stored in the format of your choice and is – according to your categories – provided with formatted headings so that you can easily create an automatic table of contents in your word processor.

4.4 Creating grouped references

If you want to divide the references in your reference list into primary and secondary sources or list your internet sources separately, Citavi can organize your reference list accordingly. Citavi can either group your cited references in your Word document. Or if you prefer, Citavi can create a grouped list of all collected references from your Citavi project, whether they've been cited or not.

Grouping cited references (Citavi 5.5 and higher)

Reference lists can be grouped by the following default criteria: reference type, year, author/editor/organization, keyword, category, periodical, publishers, series, tasks, created by, modified by or custom fields (Fig. 27). To group your reference list by a certain criterion, you need to create a grouping.

In order to create a grouping, open the menu *Citation* → *Group bibliography* → *Create or edit grouping*.

The following dialogue box *Group bibliography* opens up (Fig. 28). Use the green plus button to create a new grouping. Name your new grouping according to its grouping criterion e.g. *by reference type* if you want to group your reference list by document type.

Criteria

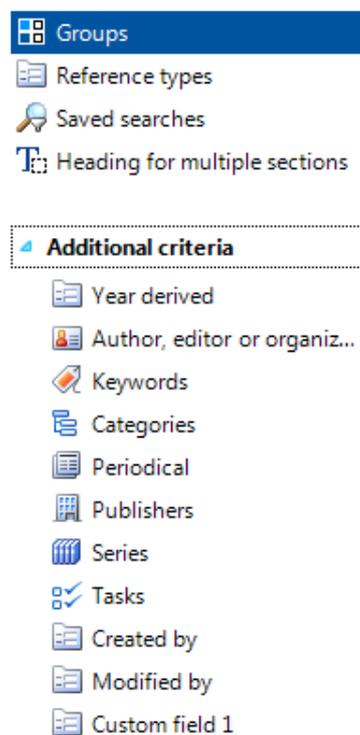


Fig. 27: Grouping criteria

Now create a new section via the + *Add section* button. Choose a grouping criterion, e.g. Reference types (Fig. 28 left). Decide whether references of all reference types should be grouped separately (Fig. 30 top middle) or only those of a certain reference type, e.g. internet documents, laws etc. (Fig. 28 bottom center).

If you want to list several – but not all - reference types separately from the main list you add a new section for each reference type. Use the up and down arrows to set the order in which the document types are displayed (Fig 28).

Beyond that, you can use saved searches or Citavi groups as grouping criteria. If you want to use a group or a search, you have to create them before creating the grouping. In each Citavi project, you can create multiple groupings. If you want to use a grouping in another project, you can export it to other projects.

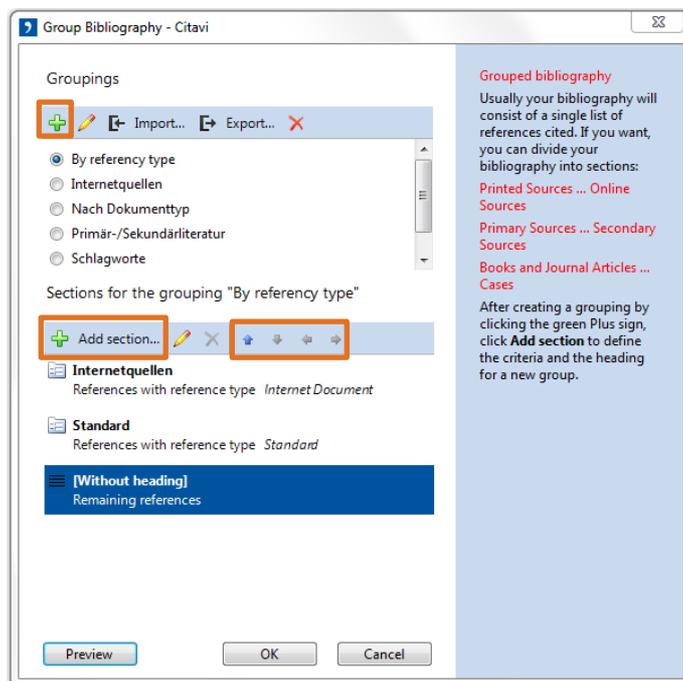


Fig. 28: Adding and sorting groupings

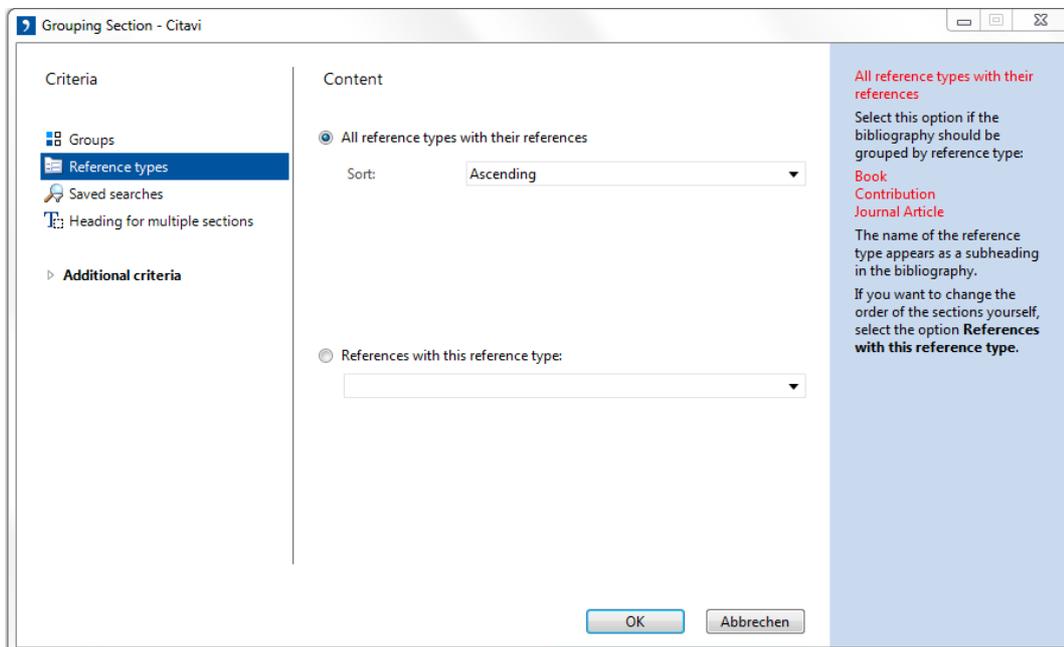


Fig. 29: Choosing the grouping criterion

Once you've created your first grouping, a new drop-down menu with the title *Grouping* is displayed in your Word-Add-In (Fig. 30). The grouping menu shows all groupings created for your current project. After you chose a grouping, your reference list will automatically be resorted according to this grouping.

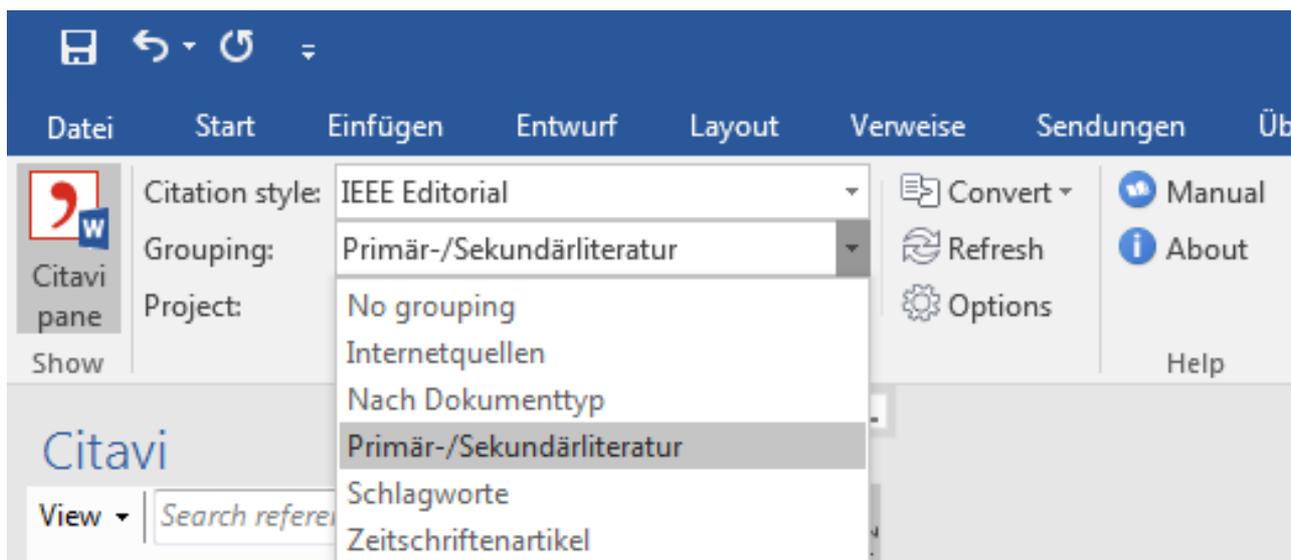


Fig. 30: Selecting a grouping in Word

Grouping collected references

Beyond lists of cited references, you can also create a list of your collected references, a bibliography. Bibliographies can be grouped, too. To create a grouped bibliography, go to the menu *Citation* → *Group bibliography* and choose a grouping. To save the bibliography use the button *Project bibliography* from the toolbar. Choose the format in which you wish to save your grouped bibliography and click *Save*.

In contrast to grouped lists of cited references, where the grouping is applied in the document itself, this function creates a new document.

4.5 Formatting reference lists in Word

The citation style defines what is listed in the reference list and how it is formatted. When there is no definition in the style the style sheets in Word determine how the entries are formatted. As soon as you have entered a citation to your text via the Word add-in, you will find additional style sheets in Word (Fig. 31): the style sheet for the *Citavi Bibliography Entry*, the style sheet *Citavi Bibliography Heading* and the style sheet *Citavi Bibliography Subheading 1-8* for up to 8 levels of subcategories.

Next to the name of the style sheet you will find a little drop-down menu where there is an option to edit the style sheet (s. Fig. 31).

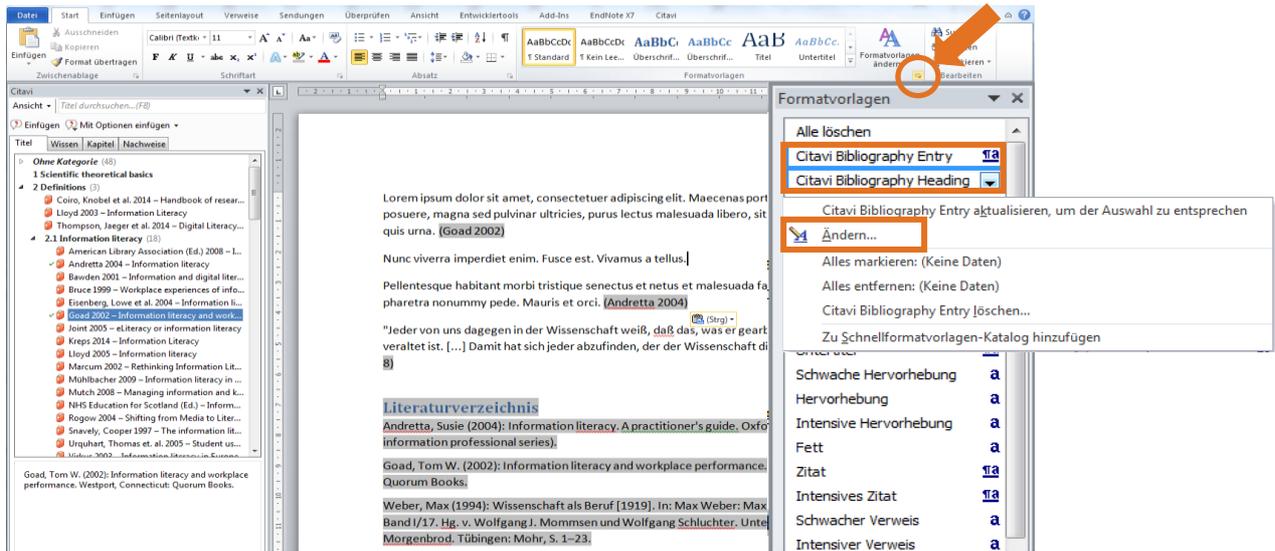


Fig. 31: Modifying Citavi's Word templates

Here you can change the font, font size, line spacing or the spacing between bibliography entries (s. Fig. 32).

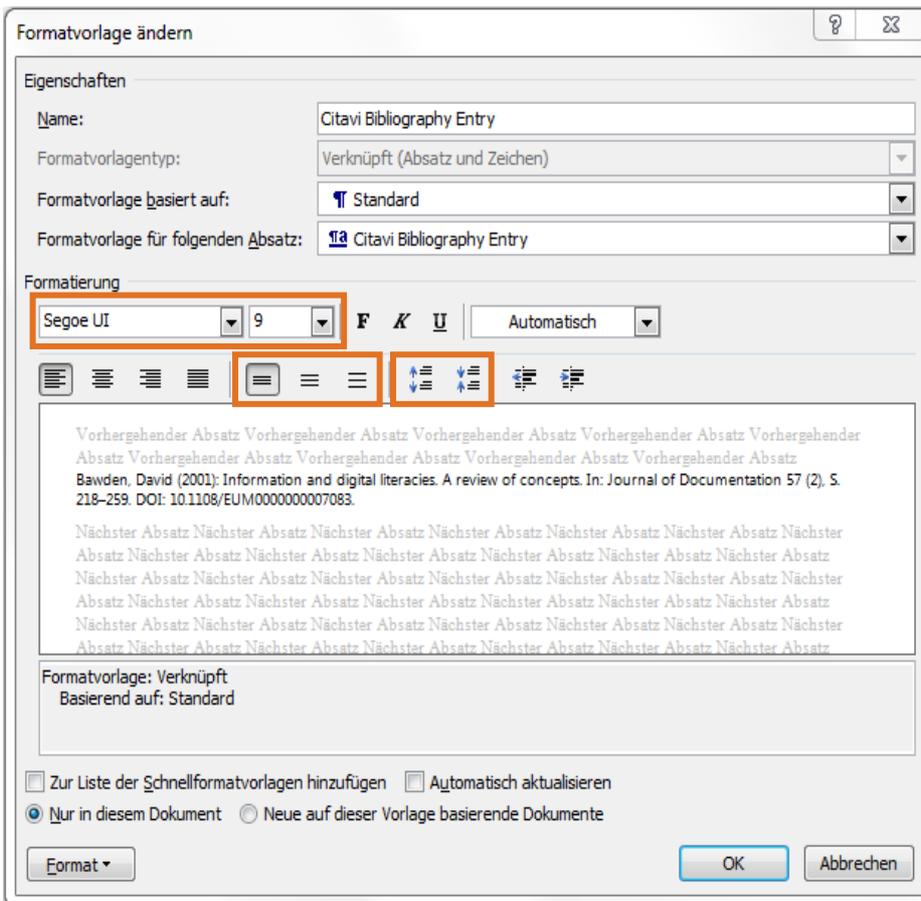


Fig. 32: Editing style sheets in Word

If you want to make content-related changes, e.g. changing the heading from bibliography to reference list, you can use the Citavi options in Word (Fig. 33).

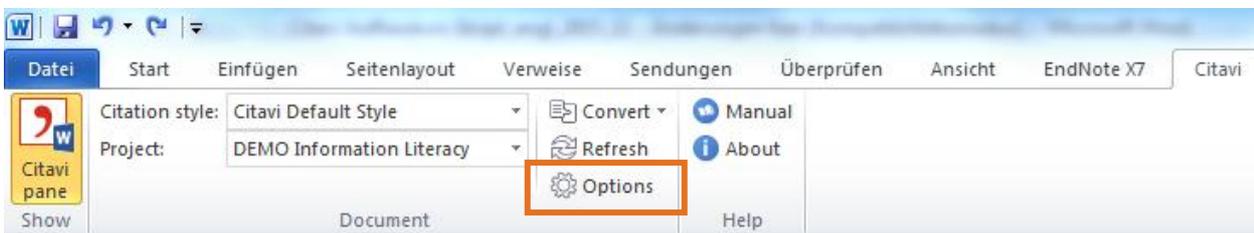


Fig. 33: Citavi options in Word

In the options menu you can choose a new heading (Fig. 34).

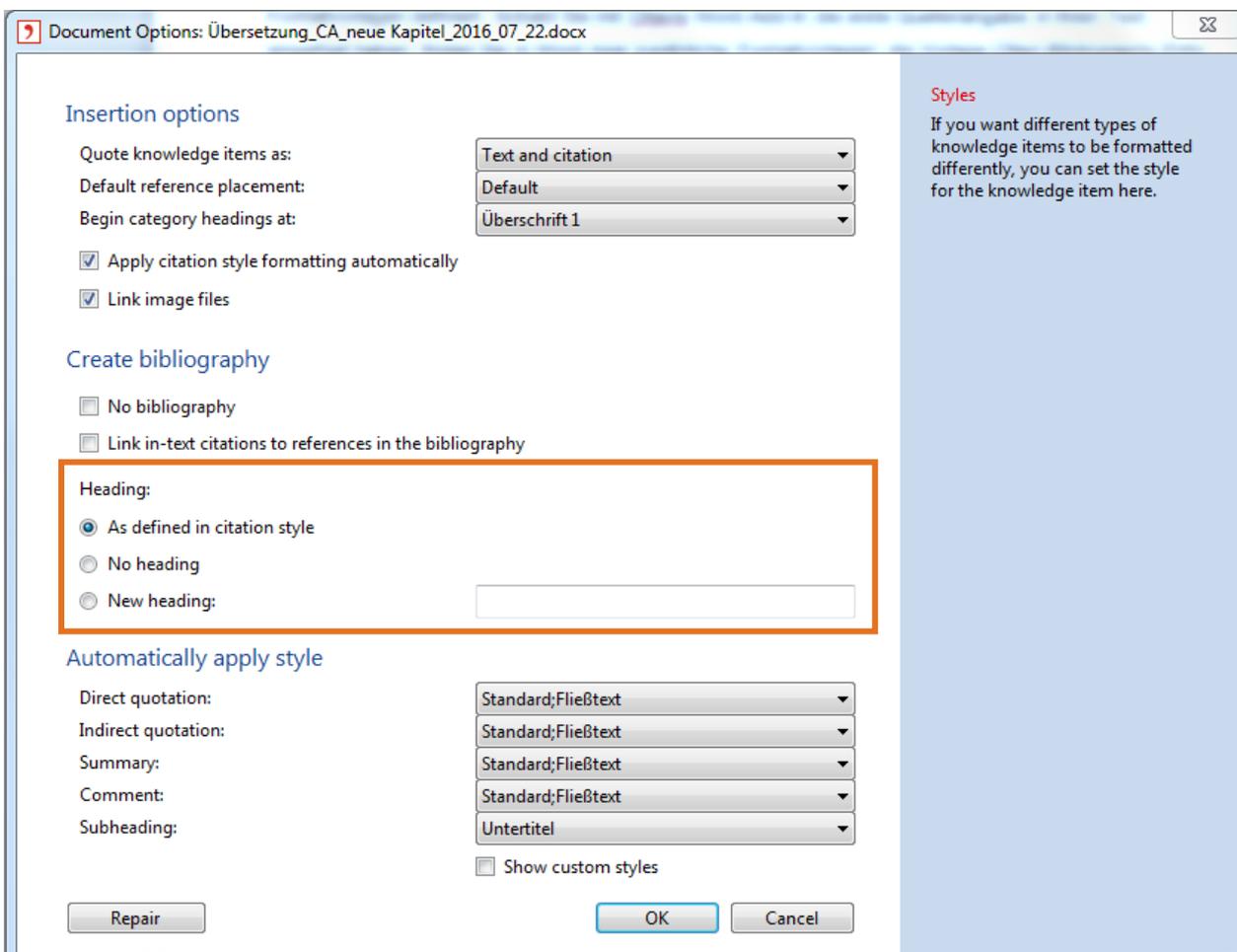


Fig. 34: Changing the bibliography heading

5 Modifying, creating and importing citation styles

In the sciences worldwide, there is a vast array of different citation styles. Styles vary, not only between countries or scientific fields, but often within the same faculty or from chair to chair.

The major “producers” of citation styles are on the one hand scientific publishers, who usually require writers to use a particular style, and on the other hand scientific institutions, associations, or individual universities that have set a particular style for their publications.

If you are unsure which style you wish/need to use for your work, we recommend the following procedure:

- Check with your supervisor / professor / lecturer / chair which style you should use.
- Inquire about which style is required when you write for a publisher.
- If in doubt, use a publication style which is prevalent in your scientific field, such as the style of an academic journal that is relevant to your subject, or style of a well-known institution in your field.
- Three very common citation styles are APA 6th ed. (Author-Year), IEEE editorial (numeric), and Chicago 16th ed. (notes) as a footnote citation style.

5.1 Changing citation styles

You can change the citation style at any time without further consequences. To do so, click on *Citation* *Citation styles* *Browse citation styles* in the menu bar. You can also access the window opened by this command directly by clicking on the reference management program area in the footer on the currently selected citation style.

In the list of citation styles those styles you have already used are listed. On the right side you will see a preview of how the main document types (book, journal article, article in an anthology) are formatted in this citation style, as well as a display of how the citation will appear in the text (Fig. 37).

To select a different citation style, click  [Find and add style...](#). In the next window, you can search for a specific style or choose a style by language restriction, citation method, or scientific field. In the bottom left you can see how many different citation styles Citavi offers. The selection of available styles is constantly expanding and required styles can even be requested from Citavi support team.

Please note that the selection of another citation style is only possible if you are connected to the Internet. This ensures that you always use the current version of the citation style for your project.

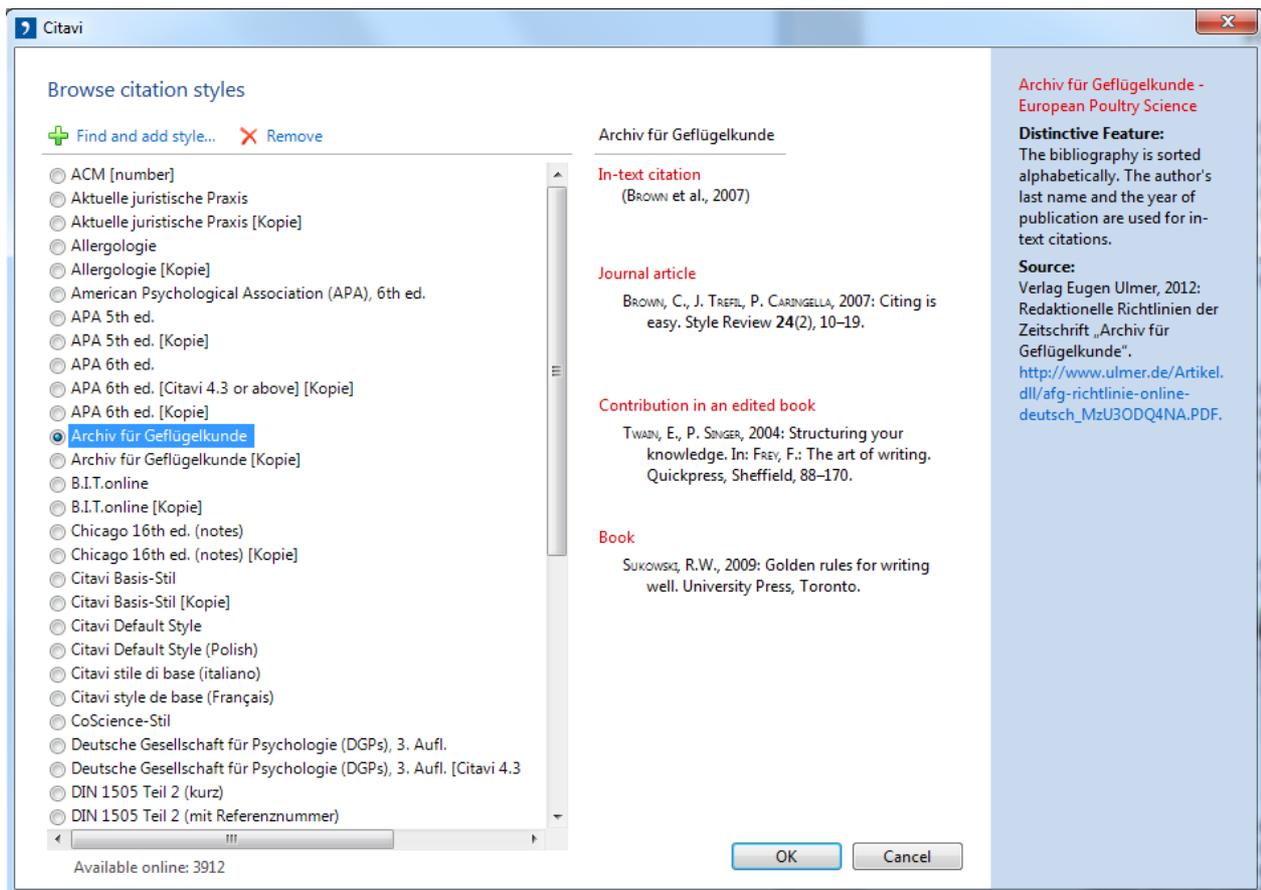


Fig. 35: Change citation style

5.2 Importing customised citation styles

Maybe your chair provides its own citation style and you need to import it to Citavi. To import a customised citation style to Citavi, save the style file in the folder *Custom Citations Styles*. This folder is usually located in your Citavi folder on your hard drive. Choose your user account and open the *Documents* folder. This contains the *Citavi 5* folder, where you can find the *Custom Citation Styles* folder (e.g. C:\Users\ga57nan\Documents\Citavi 6\Custom Citation Styles).

If you have saved your Citavi project in another location, you can easily find out where it is stored in the Citavi *Options* (*Tools* menu *Options* *Folders*). Simply open the folder via the link *Open folder in Windows Explorer* (Fig. 38).

As soon as you save your style file in the *Custom Citation Styles* folder, it appears in the list of citation styles and you can select the customised citation style via *Browse Citation Styles*.

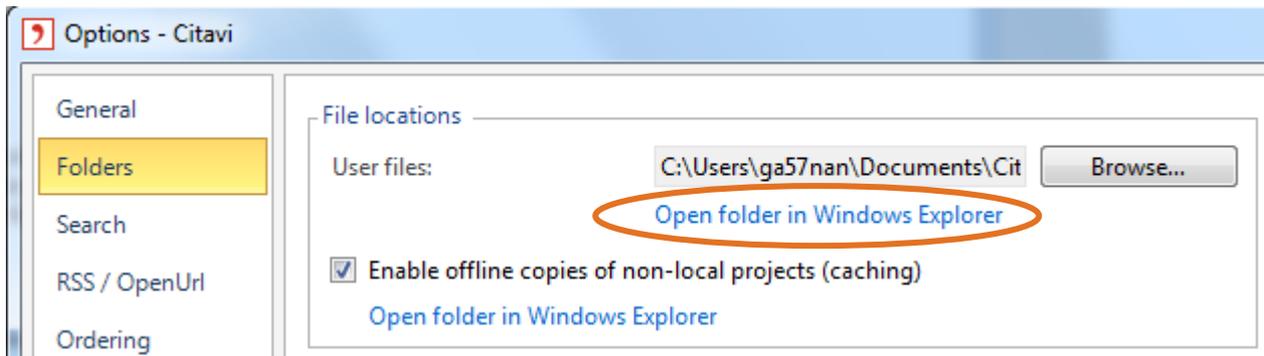


Fig. 36: Open folder location for customised citation styles

5.3 Modifying or creating a citation style

In some cases, it may happen that none of the available citation styles is suitable for your needs, whether you need to use a relatively little used style, or you have your own ideas about how your citations should appear.

In these cases Citavi offers two approaches to achieving the desired citation style:

1. You choose the citation style that comes closest to the desired style from those available and tweak it.
2. You define a completely new citation style. We do not recommend this option as creating a citation style from scratch demands considerable work and time.

In either case, begin by clicking *Citation* ▢ *Citation styles* ▢ *Edit citation style* from the menu bar. This opens a new window:

Click the  [Create citation style](#) button to begin creating a citation style from scratch (Fig. 39).

To customize an existing citation style to your needs, you first select the style you want to use as a basis. To keep the workload to a minimum, the style should largely meet your expectations. Once you have selected the style you want to change, click on  [Edit](#). In the next window you have to enter a name for the citation style to be created. We recommend you choose the default option, and create a copy of the underlying citation style. Citavi citation style editor will then open in a new window (Fig. 40). The use of this tool takes some practice and due to its complexity, this advanced course can only address the basics:

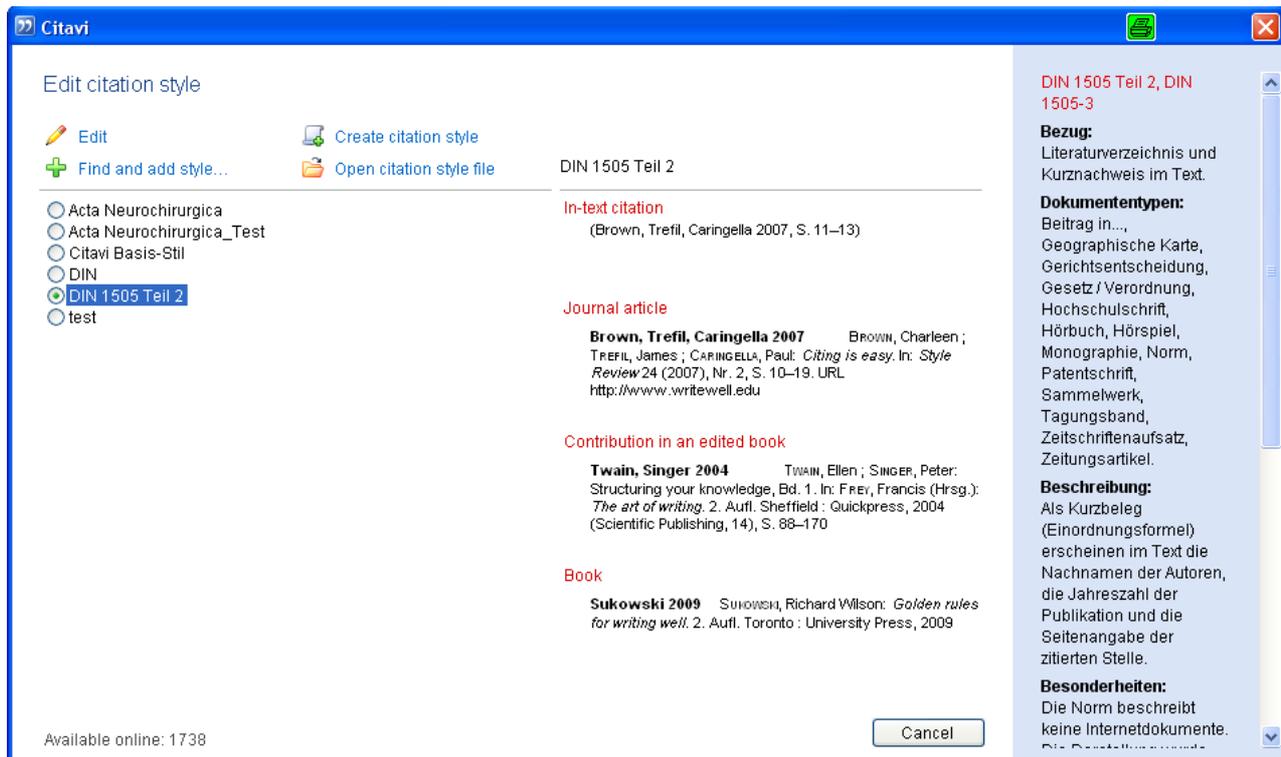


Fig. 37: Edit citation style

1. For each of the 44 available types of documents, you must define which specific details are to be reproduced in which form in the reference list. When creating a new citation style, you can skip certain types of documents that you are not likely to need. Reference types for which there is a definition already are displayed with a green dot (see Figure 40, 1).
2. In the central area you define which elements are to appear in a citation for the selected document type and according to what principles they should be arranged. In the example given for the type Book (Monograph), two so-called rule sets are defined (Fig. 40, 2) – once as a book with author and once as a book with no author. The blocks can be moved by clicking and dragging. Please note that when you move the blocks you also have to change the punctuation before and after the component (Fig. 40, 4).
3. In the left column you will see a list of available components – depending on the document type. By clicking and dragging, these may be inserted into the central area and thus into your citation style.
4. In the lower middle area under the rule sets, you can edit each individual component (Fig. 40, 2). You should specify how the punctuation should be configured with the previous elements. Not only must actual characters be defined (be it a period, a comma, a bracket, etc.) but empty characters as well.
5. With the *Edit component* button... you also have the option, for example, of setting the font style (italic, bold, small caps). Possible configurations of components for representation of names (such as author, publisher, etc.) are particularly extensive. You can set, among other things, what order, form, and with what separators people's names are to be presented (including special cases such as prefixes, double-barreled names, multiple first names).

- The right column is the preview (Fig 40, 5). Here you can see how changes will actually be executed in your project. Please be aware that there is no preview item if there is no entry of that document type within your project.

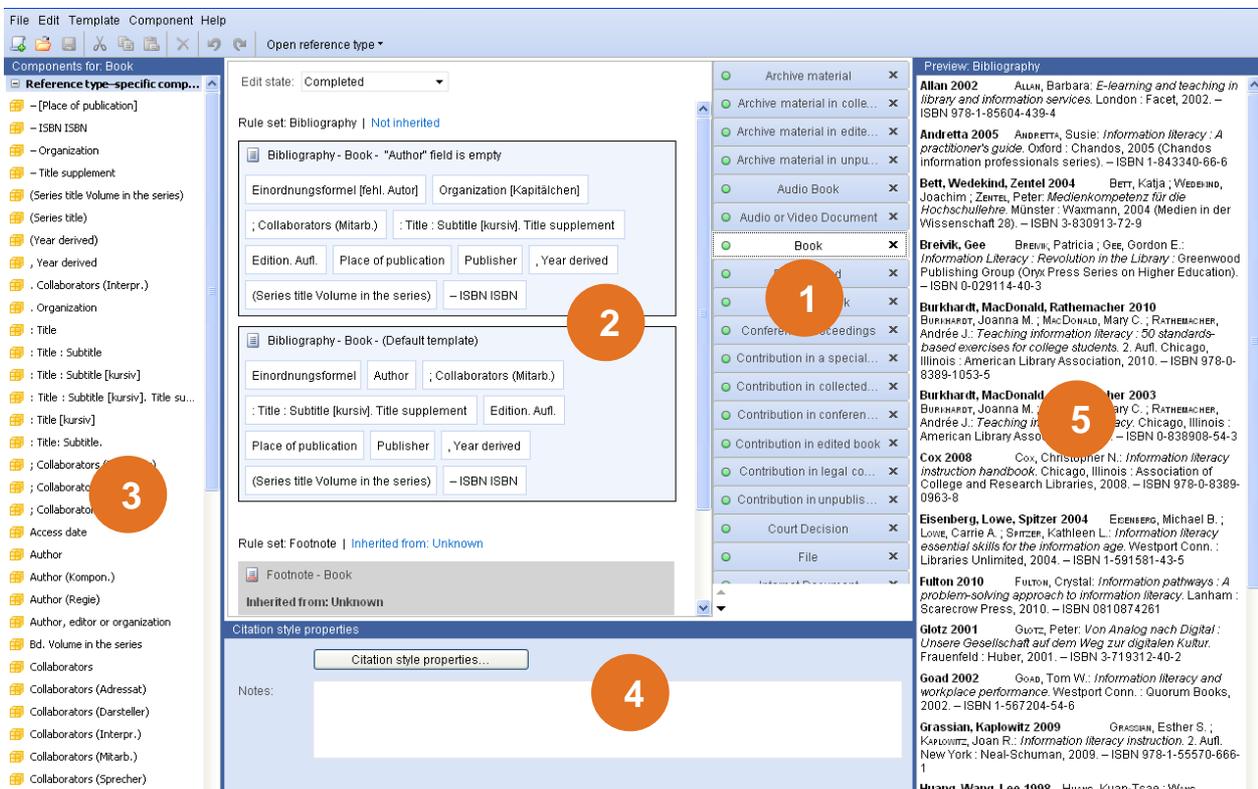


Fig. 38: Citation style editor

6 Citavi and LateX

Citavi helps you create publications with the TeX typesetting system. Use BibTeX to do this: first, write your manuscript in a TeX editor, then set placeholders for citations (BibTeX keys) in the appropriate places, and finally generate the typeset publication from the TeX file (the manuscript) and the BibTeX file (the works cited). The TeX package you use determines the final formatting.

To use TeX features, you must first turn on support for TeX in the Citavi options: **Tools** menu → **Options** → **Citation** and then select the *LaTeX support* checkbox (Fig. 40).

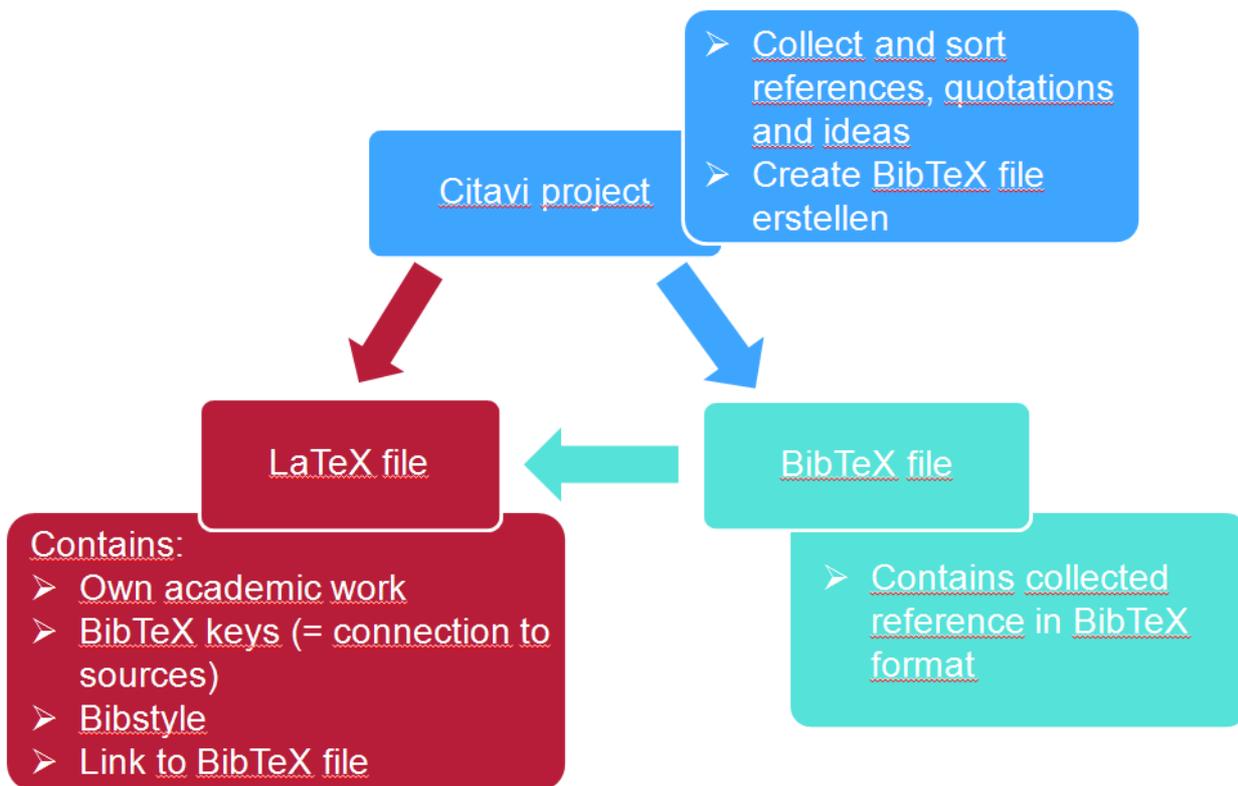


Fig. 39: Schematic overview of Citavi, BibTeX and LaTeX interaction

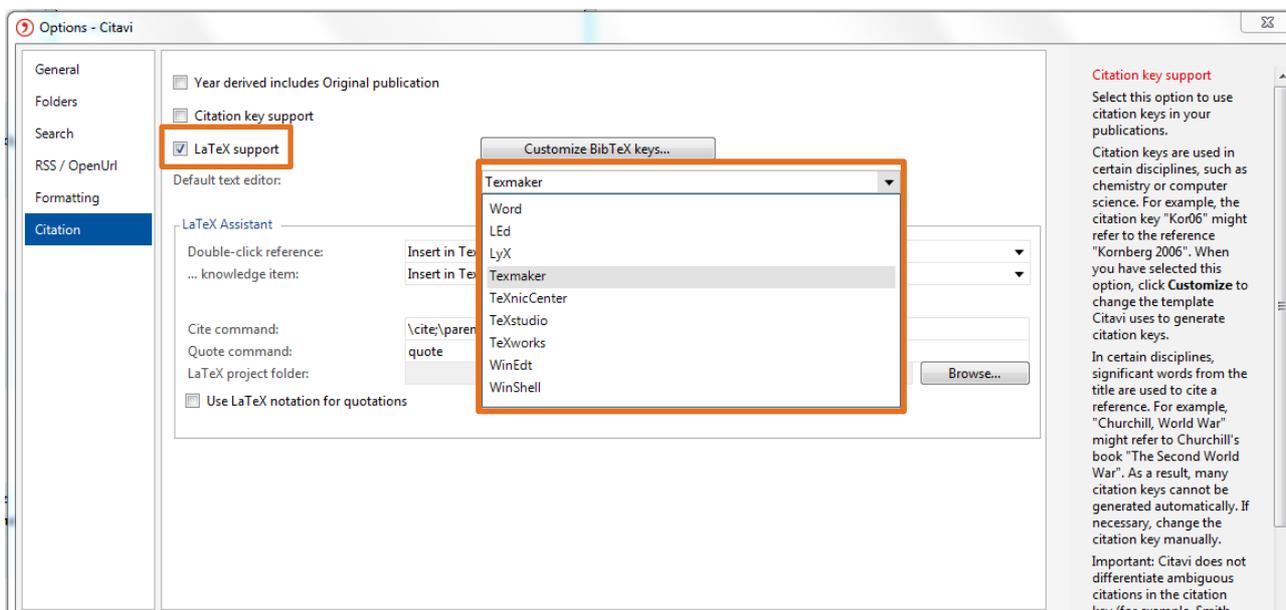


Fig. 40: Activating LaTeX support

In the drop-down menu underneath, choose your preferred LaTeX editor. As soon as you have chosen an editor, further options are displayed. If you also want to insert image quotations from your Citavi project into your LaTeX document, please select the folder where you store your LaTeX documents as your *LaTeX project folder*.

When saving the new settings, Citavi proposes to create a BibTeX key for every reference in your project. Accept and Continue. If you do not like the BibTeX keys generated by Citavi, you can also enter them manually or change the generated ones later.

6.1 What is a BibTeX key?

A BibTeX key is a unique identifier for a full reference in a BibTeX file. You insert the BibTeX key in your text to reference a citation. When your document is converted to a PDF document, the BibTeX key is replaced so that the in-text citations meets the requirements of your citations style. During the conversion, the reference list is created according to your style requirements as well.

Example:

Suppose your BibTeX file contains this entry:

```
@book{Andretta.2005
author = {Andretta, Susie},
year = {2005},
title = {Information literacy},
publisher = {Chandos},
address = {Oxford},
}
```

In your TeX document, you could insert the following citation command:

```
\cite{Andretta.2005}
```

Here, Andretta.2005 is the BibTeX key. It functions as link between the citation in your text and the corresponding entry in a BibTeX file. You find the BibTeX key at the beginning of an entry in the BibTeX file, directly after the document type.

When the document is converted, the following entry might be made in the bibliography:
Andretta, Susie (2005): *Information literacy*. Oxford: Chandos.

You can change the template of your BibTeX keys. While this might be helpful while you work on your TeX document, it doesn't have any effect on the converted final document.

6.2 Customizing BibTeX key templates

1. On the *Tools* menu, click *Options*. On the *Citation* tab, click *Customize BibTeX keys* next to the selected *LaTeX support* checkbox.
2. To change the default template for all reference types, click *Default* (Fig. 41).

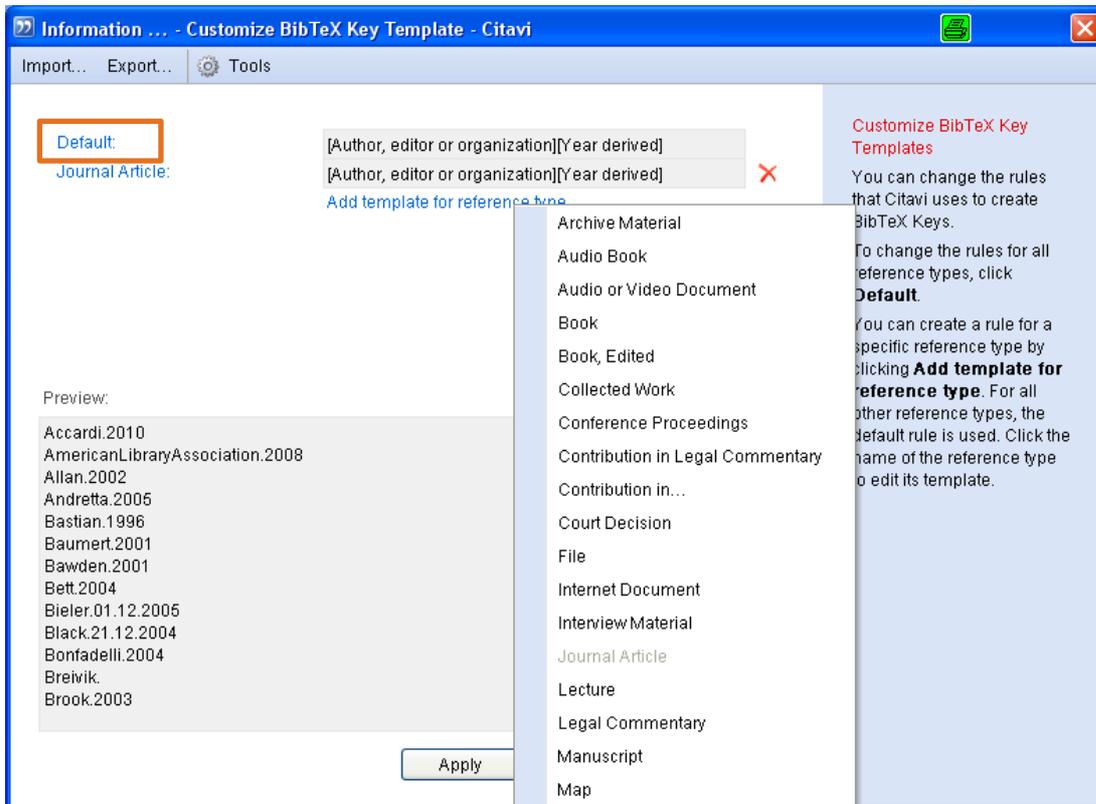


Fig. 41 Schema for the generation of customized BibTeX keys

3. Make the changes you want. You can change which fields are used to build the key, how they are formatted, the punctuation used, and conditional exceptions. If you want the punctuation between two elements to be hidden if an element is empty, insert the not sign (¬) before the punctuation by typing Alt+0172.
4. If you need certain reference types to have special BibTeX keys, you can define additional templates for each of them. Click *Add template for reference type* and then configure the template.
5. When you are finished making changes, click *OK*. Citavi asks what you want to do with existing BibTeX keys.

Note: Citavi does not automatically update BibTeX keys in existing references to ensure that BibTeX keys already used in TeX documents continue to be resolvable. If you want to generate BibTeX keys again, you can always click *BibTeX key* on the *Reference* tab.

6.3 Citing with BibTeX keys

Prerequisites

1. In Citavi's *Options* → *LaTeX* support is activated.

2. Your LaTeX document is open and your cursor placed where you want to insert your reference / BibTeX key.

Go to Citavi and select the title or knowledge item you want to insert and press the *Cite* button in the toolbar (Fig. 42).



Fig. 42: Inserting selected references and quotations to LaTeX documents

In the drop-down menu you choose, whether you want to insert the reference as in-text citation (*Insert to Texmaker*) or as footnote (Fig. 43). The inserted information could look like this `\cite{Janke.2012}`.

If the cursor is not in the correct position in your LaTeX document, you can choose *Copy to Clipboard* instead, go to your TeX document and insert it from the clipboard in the correct place.

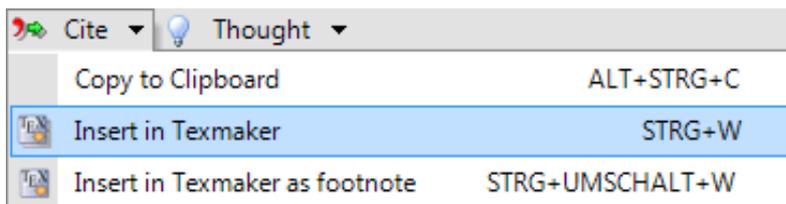


Fig. 43: Options to insert references in LaTeX documents

If you insert an image quotation from Citavi into the TeX file, an images subfolder will automatically be created in the LaTeX project folder. The LaTeX project folder must be defined in the Options so that the subfolder will be created correctly. The image file will be named according to the legend of your image quotation.

6.4 Generating a BibTeX file

1. Select references in your Citavi project.
2. In the Reference Editor, on the *File* menu, click *Export*.
3. Select which references to export, and then select *BibTeX format*.
4. Click *Edit BibTeX export definition* to change one of the export definitions: you can use the default definition, or you can use one optimized for a particular TeX package (for example, jurabib). You can also select *Customize export definition* to create your own export definition, if necessary. Then Click *Next*.
5. Click *Save file* to set the location for the BibTeX file.
6. Click *Next* and set whether you want to save the settings you just used as an export preset.
7. Click *Next* to save the file.

8. Optional: Only export references cited in the following TeX document. Select the TeX file that contains BibTeX keys from the current project. Citavi creates a BibTeX file that contains only the references cited in the TeX file.

Creating a Custom Export Definition

In addition to the default, Citavi includes export definitions specifically for various TeX packages, including jurabib and natbib. To create a custom export definition:

1. In the Reference Editor, on the *File* menu, click *Export*.
2. Select which references to export, and then select *BibTeX format*.
3. Click *Create BibTeX export filter*.
4. Define the reference type mapping and then click *Next*.
5. Define the field mapping. To set a field as "required" in the BibTeX key, click the circle next to it. Then click *Next*.
6. Set the export options for the export definition and then click *Next*.
7. Give the export definition a name and a description for the Quick Help area, and then click *Finish*.
8. Set the file name and folder you want to export your BibTeX file to and click *Next*.
9. Decide whether you want to save your BibTeX export filter permanently or not and finish the export by clicking *Next*.

7 Task planning in Citavi

Citavi will also help the time management of your scientific work. The program thus provides a third component in the Task planning  program area. The Task planner allows you to plan the various stages of work with regard to your sources and the production of your text, while keeping deadlines in view.

In this program area, you can add new tasks using the green plus  icon:

- **Project tasks** *  New project task
These tasks are generic and serve to help plan important steps in the process of creating your work.
- **Reference tasks** *  New reference task...
This type of tasks relate to individual references. You can be reminded, for example, that you need to return a book to the library or that you want to excerpt a reference on a certain day, to

be ready for the next meeting with your supervisor.

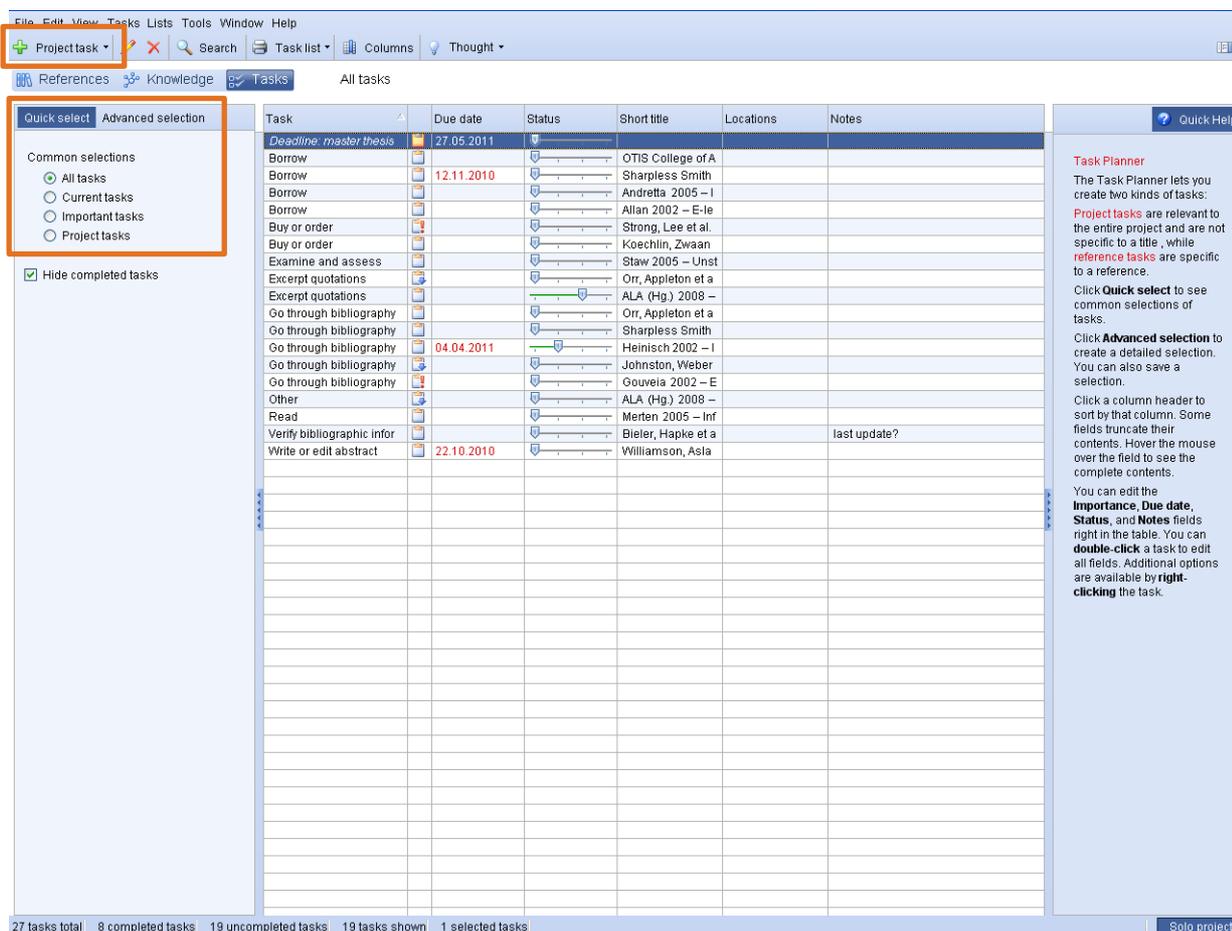


Fig. 44: Program area Task Planner

You can assign all tasks a priority, completion date, or an editing progress status. The task planning program area start page gives you an overview of all your impending tasks. Under the *Quick select* and *Advanced selection* tabs you can choose different filtering options (Fig. 44).

8 Citavi Cloud

From version 6, Citavi offers a cloud function. The Citavi Cloud has two functions. First, it provides the license key (see lecture notes on the introductory Citavi Course), second, it serves as storage for your Citavi projects. The cloud is located on Microsoft servers in Magdeburg and Frankfurt. Neither Microsoft nor Citavi can access your projects.

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 installed Citavi 6.

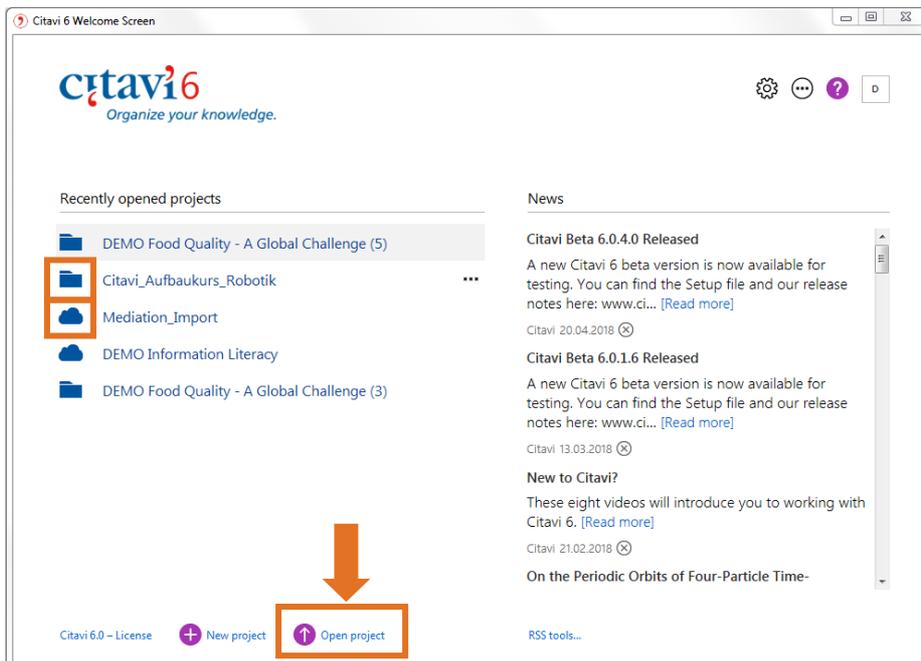


Fig. 45: Projects storage locations on the welcome screen

On Citavi's welcome screen the most recently used projects are displayed (*Recently opened projects*, Fig 45). The folder and cloud icons in front of the project title indicate whether the project is stored locally or in the cloud. All other projects can be opened via the *Open Project* button at the bottom of the welcome screen.

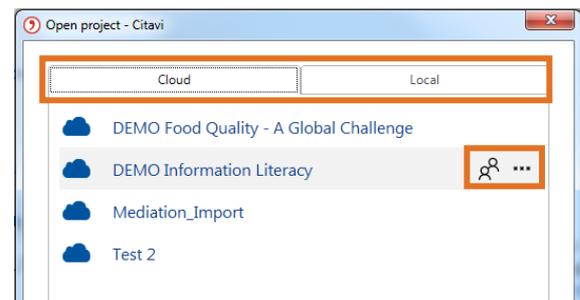


Fig. 46: Locally and cloud-stored project

Together the tabs *Cloud* and *Local* show all your projects (Fig 46). If you move your mouse over one of your locally stored projects' titles, three dots appear on the right. Clicking on the three dots, you can see where the project is stored as well as a description of the project (if available).

If you move your mouse over one of your cloud projects' titles, another button with two little men is displayed. Via this button, you can invite colleagues and fellow students to your project and attribute them the reading or editing rights.

8.1 Assigning roles to team members

For cloud projects, there are four different roles: reader, author, project manager and owner.

- Readers can read.
- Authors can edit projects.
- Project managers can edit projects, invite new team members and assign roles.
- Owners can delete the project + anything project managers can do.

The owner is the person who created the project or saved it to the cloud. The owner cannot be changed. If the owner of a project leaves the institution or project group, a member of the team can create a copy of the project. So that the remaining team can continue working with the copy. The team member who created the copy is the owner of the project copy. To see which team member has which rights, click on the little man button right to the project title. As Owner or manager, the screen in Fig. 47 is shown.

You can see which role and therefore which rights each team member has and whether the person has accepted the invitation to join the project.

In the lower part of the window you can invite new team members and assign them the appropriate role. Invited team members receive an e-mail providing the link to the team project. The invitees log in to their Citavi account and thereby accept the invitation.

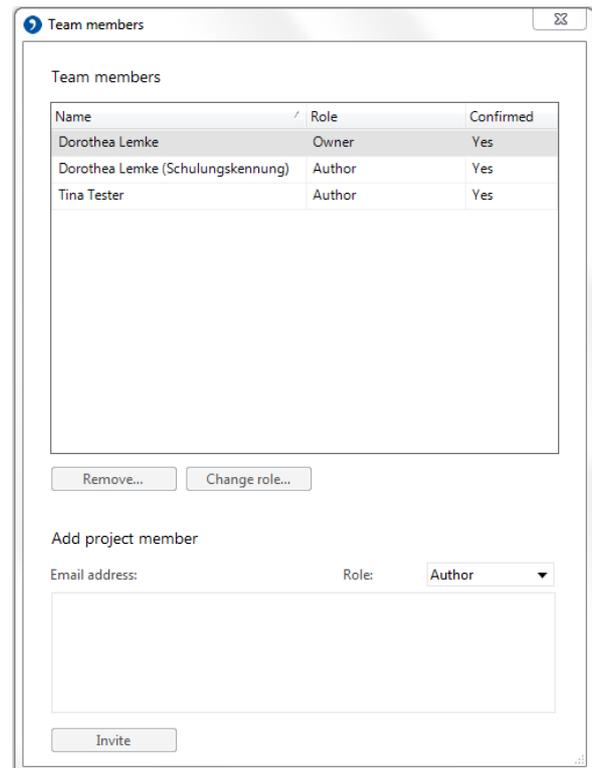


Fig. 47: Assigning roles for cloud projects

8.2 Converting local projects to cloud projects

If you want to save a locally stored project to the cloud, e.g. to work with it from different computers or share it with colleagues or fellow students go to the *File* menu → *Copy to cloud ...*

8.3 Working offline with cloud projects

If you open a cloud project, a copy of the project without attachments is automatically stored on your computer. If you want to save also the attachments on your computer for longer offline work periods, go to the *File* menu → *This project* → *Properties* → *Tab Attachments* (Fig. 48). Use the button *Save all attachments locally (for working offline)* to store all attachments on your computer. This procedure has to be repeated for every longer offline work period.



Fig. 48: Saving file attachments for offline work

8.4 Chatting with team members

While working on a cloud project, you can chat with team members who are working with the project at the same time. In the bottom right corner of your screen, you can see how many other users are online (Fig. 49). Select the person you want to chat with and go to *Open chat* to start your chat.

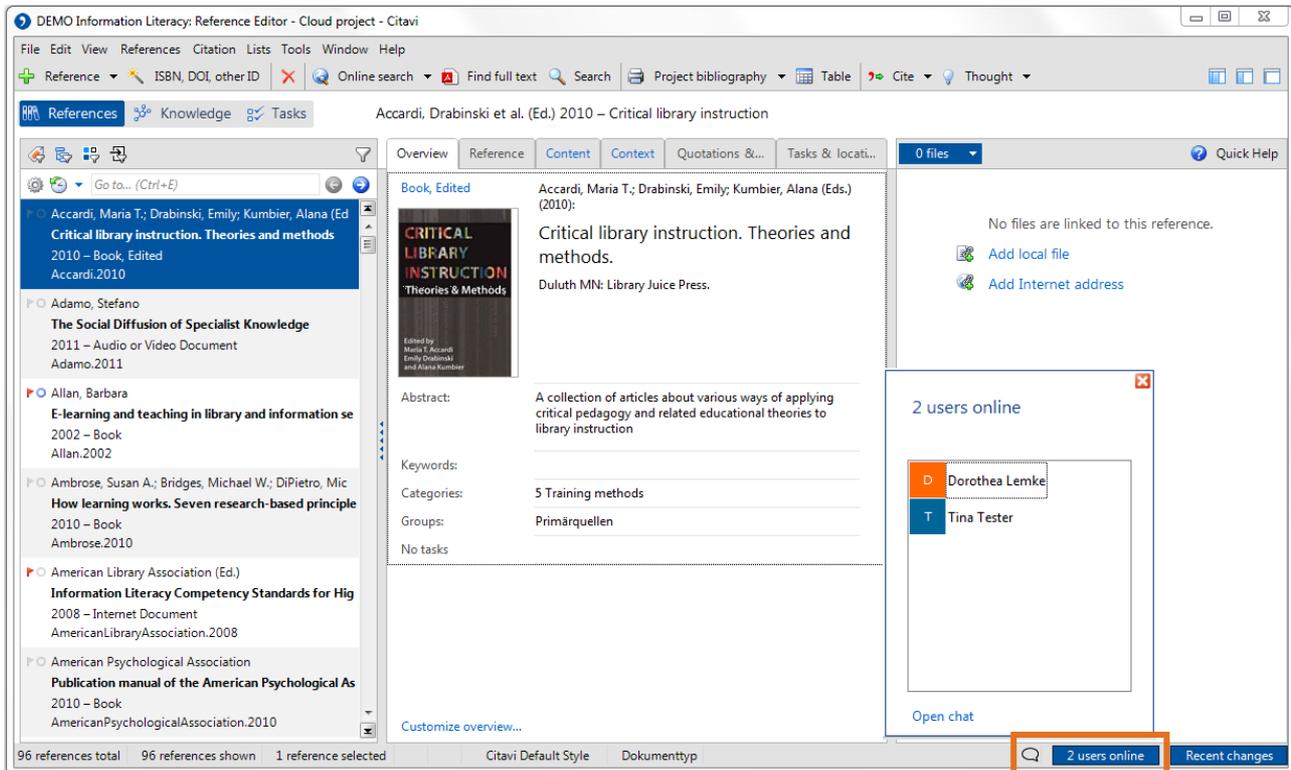


Fig. 49: Chat in cloud projects

9 Citavi add-ons

Beyond all installed functions Citavi offers optional functions, you can install via add-ons if you need them. You can find all available add-ons via the *Tools* menu → *Manage add-ons ...*

Here are e.g. add-ons ...

- to converge author names in all caps to normal capitalization
- to export attachments to a folder tree
- to check whether links of your online sources are still active or
- to sort your references by parent and child reference
- to import a list of journal abbreviations, which are required by some citation styles.

Choose the add-on you want to install and go to the *Install* button on the top right of the add-ons window (Fig. 50). To use your newly installed add-ons, please restart Citavi. On the tab *Installed*, you can always see, which add-ons you've already installed.

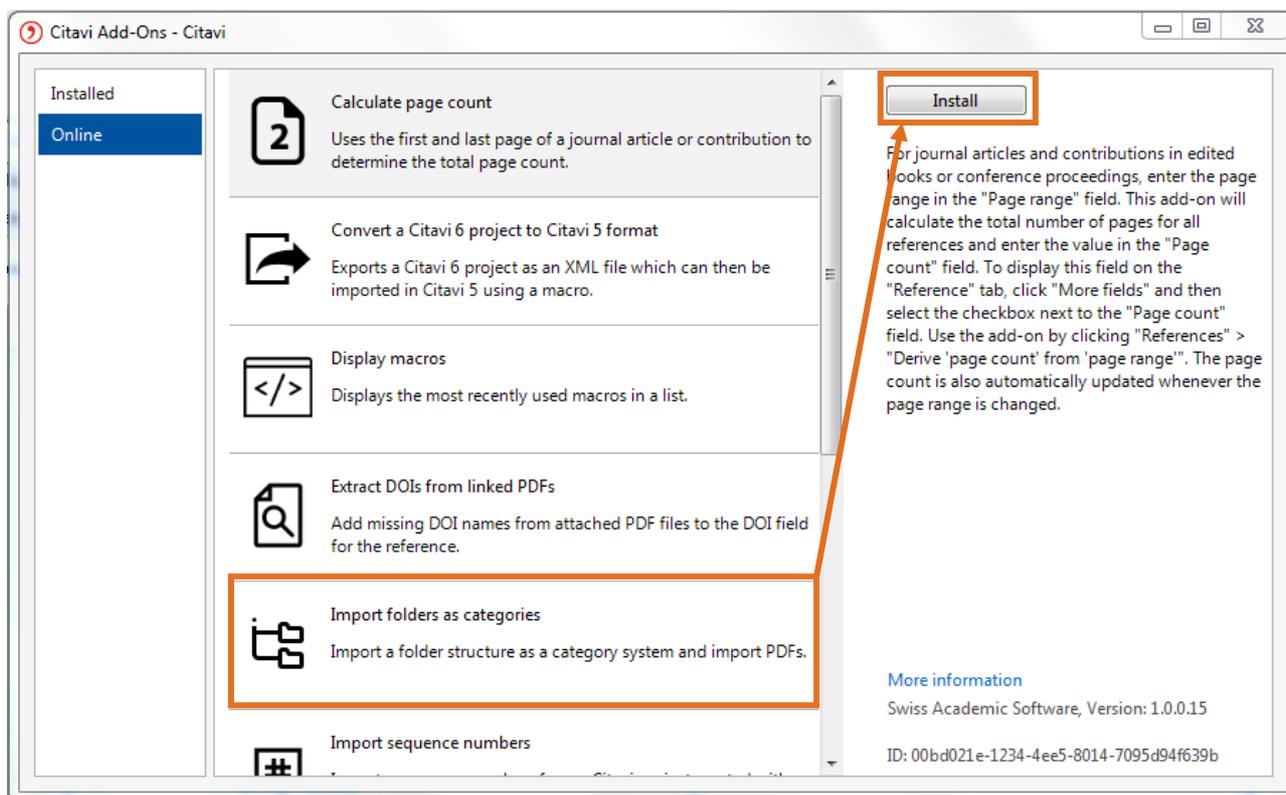


Fig. 50: Installing Citavi add-ons

After installation, you find the add-ons in the semantically related menus. You can e.g. find the add-on *Check links and update access date* in the *References* menu, the add-on *Import journal abbreviations* in the *Periodicals* list and the add-on *Correct author names in all caps* in the *Persons and organisations* list.

10 Contact and support

For questions about Citavi you can get help and support in various ways:

- In the program you can visit the *Help* link in the menu bar, or the *Manual*  Manual , as well as the *Citavi service and support*  Customer service and support website. On this page you will find FAQs about Citavi, films and animations about how to use the program and an extensive forum for Citavi users, where many issues and problems have already been discussed.
- In all program areas you will find the link to the *Quick Help*  Quick Help in the right column. If this is activated, you will receive context-sensitive support when working with Citavi.
- Please also contact university library information services: literaturverwaltung@ub.tum.de.
- In addition to our courses on reference management, we offer a weekly reference management drop-in session in Munich or online sessions, where individual questions can be discussed. The current schedule can be found on our homepage at <https://www.ub.tum.de/en/consultation-citation>
- The TUM citations guide will help you with questions on how to cite: <https://media-tum.ub.tum.de/node?id=1225458>

Add Citavi's search engine to Firefox

Citavi has an add-on for Firefox that allows you to search Citavi's manual, FAQs, forum, videos and website at the same time. Enter the address [citavi.com](https://www.citavi.com) in your browser; a small green + sign will appear in the integrated search slot of Firefox (see Fig.51).



Fig. 51: Finding Citavi's search engine

Then click on *"Citavi" hinzufügen* or *Add "Citavi"* (see Fig. 52). To search with the Citavi search engine, enter your search terms in the search slot and then click on the Citavi symbol in the drop-down menu (see Fig. 53).

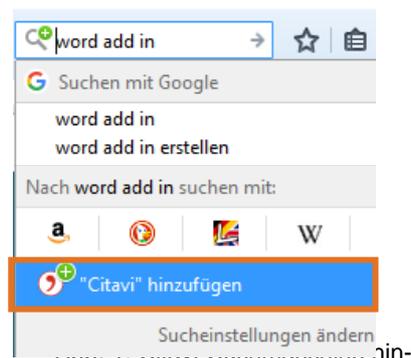


Fig. 52: Adding Citavi's search engine

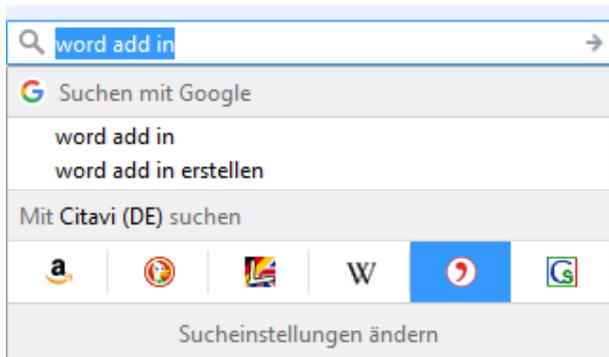


Fig. 53: Search with the Citavi search engine

11 Glossary

Citavi Picker	Citavi Pickers are free additional programs with which you can import information from Internet Explorer, Mozilla Firefox, Google Chrome or Acrobat Reader.
Reference database	Databases where you can find articles on your specific subject. From reference databases, you can export references to Citavi.
DOI Digital Object Identifier	Unique identification number for electronic publications. DOIs are used especially for journal articles.
Reference type	Reference type indicates the outward form of an information source, such as collective work, newspaper article, or audiobook. Reference types are in other contexts referred to as "publication types" or "forms of publication". Citavi provides different input masks for different types of references in order to capture all relevant information.
Excerpting	Taking important passages from a book / article.
Filter	You can filter your references according to specific criteria. You can filter simply by label (hoops or flags), categories and keywords. Similarly, you can also filter by publication year, series, magazine, document type, and person.
Thought	In the context of Citavi, "thoughts" are ideas about your work that are independent of your sources. You can also retain pictures and files as thoughts.
Indirect quote	An indirect quote is the reproduction of the words of a source in your own words. You can assign a category to indirect quotations.
ISBN	International Standard Book Number; since November 1971, every book carries a unique identification number, which is important for the management of media and the book trade.
Category	In the area of knowledge organization, you can create different categories (such as the headings in your work), to organize your knowledge items (quotations and thoughts) and their source content.

Comment	In comments, you can, for example, capture your ideas about a book. Comments are always associated with sources. If you have an idea independent of a source, use the Citavi knowledge item "thought".
List	Citavi creates term lists for specific fields, such as the author or publisher field. For example, the lists will help you standardize all references to an author so that you always use the same form of the name.
Label	In Citavi you can add labels to a reference. There are two different labels, a blue hoop and a red flag, with the help of which you can select references. You determine the meaning or significance of the label yourself. You can also filter all references with label.
Project	A Citavi project is a collection of references, thoughts, quotations, and tasks that are needed to achieve a project goal (equivalent in other Windows programs to the terms "file" or "database").
Project Task	A project task is an appointment independent of your references, for example, a deadline for handing in your scientific work.
PubMed ID	Identification number of a source in the PubMed database.
Keyword	You can assign keywords to your references. Using these words, you can filter references or group them in the table view so that all the references with that keyword are displayed.
Table View	In Table View Citavi displays all your references in tabular form. You can choose which columns are displayed and in what order. The table can be exported to Microsoft Excel or OpenOffice Calc. A grouped view of your references is also possible in the table, for example, grouping by year.
Reference	A reference means a single work in a project. If you add a new journal article or a book to your project you are incorporating, to use the Citavi terminology, a new reference.
Reference task	Whenever you want to set an appointment in relation to a source, such as a book, you create a reference task. A reference task may be, for example, the return date of a book that you have borrowed from the library.
Direct quote	A direct quotation is a verbatim reproduction of a source. Direct quotations are always given in quotation marks. You can assign a category to direct quotations.

Knowledge item	A knowledge item is a quotation, a summary, a comment, or a thought.
Citation	The source of a quotation, a summary, a comment, or a thought given in the text.
Citation style	A provision as to how a source must be cited. Citation styles are created by scientists or publishers and specify the precise format and necessary details of a quotation or citation.

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