

1 Setting Up

1 Install After downloading, open [CitaviSetup.exe](#) to begin the installation. Select the Pickers you want to install (for Firefox, Internet Explorer, and Adobe Acrobat and Adobe Reader). These let you easily copy information from Web and PDF documents.

2 Create a New Project On the welcome screen, click **New project**:



Choose whether you want to create a project to work on alone (a solo project) or with others (a team project).

Give it a descriptive name and click **OK**. By default, solo projects will be stored in the folder `Citavi 3\Projects`. Save team projects on a network share that all the team members can access.

3 Enter License Key You receive your license key directly from us by e-mail. Just select the entire text of the license key message and copy it to the Clipboard (**Ctrl+C**), and then on the **Help** menu, click **License**. The license assistant will explain the rest.

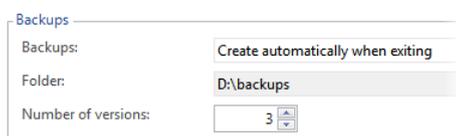
4 Special Case: Site Licenses Site licenses are time-limited. As long as the site license is renewed, you will receive a new license key in time.

Some organizations offer their members special settings files, which configure your Citavi for the organization. Check your organization's website for a settings file and download it if one is provided. Then, on the **Tools** menu, click **Import or export settings**.

5 Set Up Backups Citavi automatically saves your changes, so you don't have to remember to save.

Whenever you close a project, Citavi saves a backup of it under `Citavi 3\Backup`. The backup is saved in a ZIP archive with the name of the project and the date.

It's a good idea to regularly copy the backups to an external disk. To change the backup settings, on the **Tools** menu, click **Options** and then click the **Folders** tab.

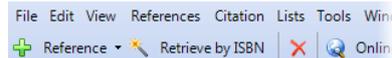


2 Adding and Navigating

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

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

1 Add a Reference Click **Reference** on the toolbar and select the appropriate reference type.



Hint: Click the reference types to read descriptions of them. Then drag the reference types that you use most often to the favorites on the left.

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

Last name	First name	Middle name	Prefix	Suffix
Abbott	Andrew			
van den Meer	Simon			
▶ Thomas	George	Clifford		Jr.
* Click to add a person				

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

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

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

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

5 Navigate Click the arrows   to browse through your references. Click **Back**  to go back to previously viewed references.

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

3 Searching for Sources

You can search over 4000 library catalogs, bibliographic databases and more right from Citavi.

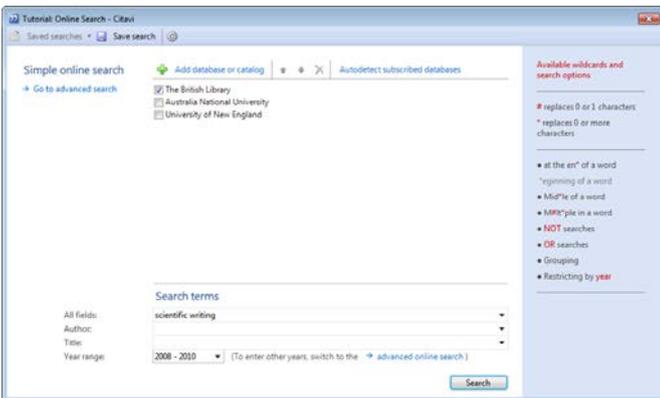
1 Add a catalog Make sure you have an Internet connection, click **Online search**, and then click **Add database or catalog**.



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

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

2 Run a Search Select the catalogs you want to search. You can select more than one catalog at a time. If you enter more than one search word, Citavi will search for references containing *all* of the search words. Pay attention to the Quick Help texts: they give you tips for building your search. Click **Search** to run the search.



3 Add Search Results Citavi presents the search results as a list. If the search didn't find what you want, try again with different search terms. Then select the references you want to add, and click **Add to project**.

4 Cancel Selection The references you add to your project are automatically applied as a selection (a subset of your references), so the others are hidden. This makes it easier to work with just the new references, for example to review and create tasks for them (see section 5). To see all references, click **Cancel selection** in the status bar.



4 Using the Pickers

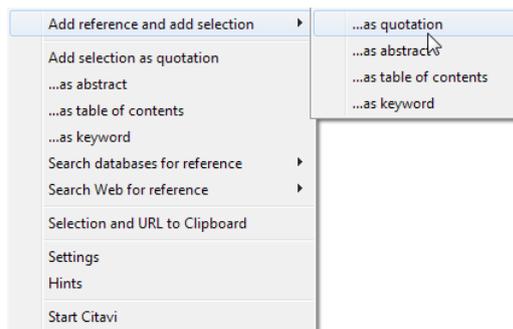
Pickers are extensions for Internet Explorer (8 or later), Firefox (4 or later) and Adobe Acrobat and Adobe Reader (8 or later).

The Pickers make it easy to add Internet documents to your project and to save text passages and images in Citavi with just a click. If you didn't install the Pickers when you first installed Citavi, you can always add them later.

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

2 Hint: Save Web Page as PDF Web pages often disappear without notice. To make sure you always have a copy of the text, you can save a PDF of the page. In the Preview in Citavi, load the page, then click **Click here to save a copy of this Web page as a PDF**.

3 Add a Quotation from a Web Page Select the passage you want to quote, right-click it, and then click **Citavi Picker > Add reference and add selection > as quotation**.



If you've already added the Web page, you can click **Add selection as quotation** to add the quotation to the reference that is open in Citavi.

4 Add an Image You can right-click an image to add it as an image quotation or cover art.

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

Of course, you can also add text and image quotations from a PDF, too.

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

5 Planning Tasks

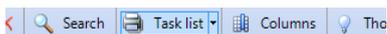
Photocopy, **Verify bibliographic information**, and **Read** are just a few of the tasks you can assign to a reference.

1 Assign a Task to a Reference In the **Reference Editor**, on the **Tasks and Locations** tab, click **Task**:



If you enter a due date, Citavi will remind you when it is approaching.

2 Print a Task List To get an overview of all your tasks, in the **Task Planner**, click **Task list**:

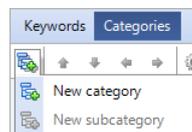


3 Hint: Create a Project Task In the **Task Planner**, you can also create **Project tasks**, which do not apply to a specific reference. This is good for major deadlines, deliverable dates, etc.

6 Creating an Outline

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

1 Create a Category System In the **Knowledge Organizer**, click **New category or subcategory**:



Name the category, and continue adding new categories and subcategories to match the structure of your paper.

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



The changes automatically apply to all items assigned to the category.

3 Assign Categories You can assign one or more categories to every reference, quotation, and thought in your project. In the **Reference Editor**, on the **Context** tab, click **Categories**. Select the categories you want to assign and click **OK**. To assign categories to a quotation or thought, double-click it, and then proceed the same way.

7 Organizing Knowledge

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

1 Add Text Quotations You already know how to add a quotation with the Picker. Of course, you can also do it by hand if you don't have a source as a file on your computer. Choose the right kind of quotation: **Direct quotation** for a verbatim quotation, copied word-for-word; **Indirect quotation** for the author's thoughts in your own words; **Summary** for a heavily condensed version in your own words; **Image or file quotation** for images and audiovisual media; **Comment** for your opinions and notes about a statement by the author.

In the **Reference Editor**, on the **Quotations** tab, click **Direct quotation**. Enter the **Page range**. Click **Core statement** to enter a concise rewording of the main idea of the quotation.

You can also apply **Keywords** and assign Categories. (See section 6.)

2 Add Image Quotations Image and file quotations work the same way as text quotations. You can enter a **Caption** and **Description** as well.

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

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

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



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

8 Printing a Compilation

If you need a hard copy of your collected quotations and knowledge, you can use the **Compilation** feature to create a printout sorted by category, with subheadings intact.

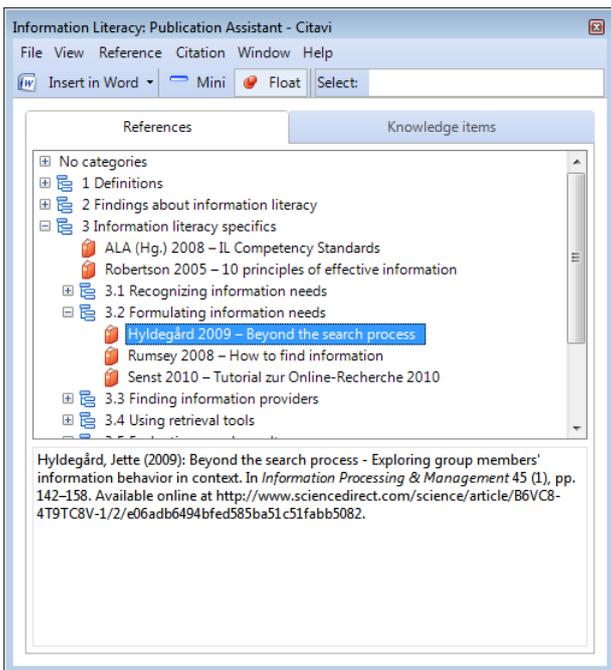
1 Print Compilation To print a compilation, in the **Knowledge Organizer**, click **Print**. If you want to save a compilation to use as a starting point for your paper, click **Save compilation**.

9 Writing

While you write your paper, you can use the **Publication Assistant** to help you insert citations and quotations into your text or footnotes with just a click or two.

1 Select a Word Processor On the **Tools** menu, click **Options**. If you use Microsoft Word, OpenOffice.org Writer, or LibreOffice Writer, select it as the **Default word processor**. If you use LaTeX, first select the **TeX support** checkbox, and then select your TeX editor as the default word processor.

2 Open the Publication Assistant In the **Reference Editor**, on the **Citation** menu, click **Publication Assistant** (or press **F7**). Click **Float** to make the Publication Assistant stay visible as you work in your word processor. Click **Mini** to save screen space.



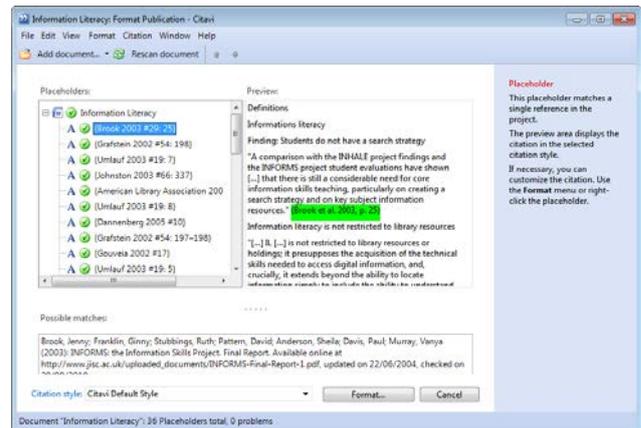
3 Insert Citations In the manuscript of your paper, click where you want a citation to appear. In the Publication Assistant, on the **References** tab, click **Insert in Word** (or whichever word processor you selected). Here you can choose whether to insert in-text (**Insert in Word**), or as a footnote (**Insert in Word as footnote**). Citavi inserts a **placeholder** for the reference. Placeholders have braces: { Smith 2008 #24: 13-15}. In the final step (see section 10), Citavi converts all the placeholders into properly formatted citations according to the selected citation style — for example (Smith 2008, pp. 13–15), [Smith 2008: 13ff.], or [44] — and generates a bibliography if the style calls for it.

4 Insert Knowledge Items In the Publication Assistant, on the **Knowledge items** tab, click the knowledge item you want to insert and proceed as in the last step. Quotations include the placeholder automatically to ensure they are properly cited.

10 Publishing a Document

After you have inserted placeholders for all the citations in your manuscript (see section 9), Citavi can convert them to their final format and generate a bibliography specific to the document. You can also manually generate a project bibliography containing all the references in the Citavi project.

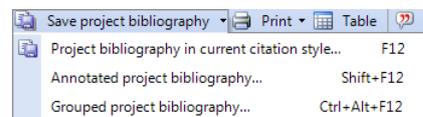
1 Prepare to Format In the **Reference Editor**, on the **Citation** menu, click **Format publication**. Select your manuscript. Citavi reads the text, finds all the placeholders, and then matches each with a reference. If it can't, the affected placeholder will show an error.



If necessary, click **Citation style** to choose the correct style. (If the style you need isn't in the list, click **Find and add style** to add it.)

2 Format the Publication To perform the formatting, click **Format**. The placeholders are replaced with the correct citations, and, if the citation style calls for it, a bibliography (containing only the references cited in the paper) is inserted at the end of the document.

3 Generate a Project Bibliography To generate a project bibliography with only the standard bibliographic information for the selected style, in the **Reference Editor**, click **Save project bibliography**. To generate a project bibliography with additional information (e.g. abstracts, tables of contents, and quotations), select **Annotated project bibliography**.



? More Information and Help

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