

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, Google Chrome, 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 4\Projects**. Save team projects on a network share that all team members can access.

3 Features Available The edition you use determines the number of references you can save per project and whether or not you can create team projects:

Edition	Team & solo projects ≤ 100 references	Solo projects over 100 references	Team projects over 100 references
Citavi Team	All features available		
Citavi Pro	All features available		
Citavi Reader	Read-only: no editing possible		
Citavi Free	Read-only: no editing possible		

4 Enter License Key You will receive your license key directly from Swiss Academic Software by email. 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.

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 4\Backup**. The backup is saved in a ZIP archive with the name of the project and the date.

To restore a project from a backup, right-click the ZIP archive and select **Extract all** from the shortcut menu.

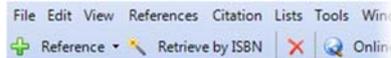
It's a good idea to regularly copy the backups to an external disk. To change the backup settings, on the **Tools** menu, click **Options** and then click the **Folders** tab.

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 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.

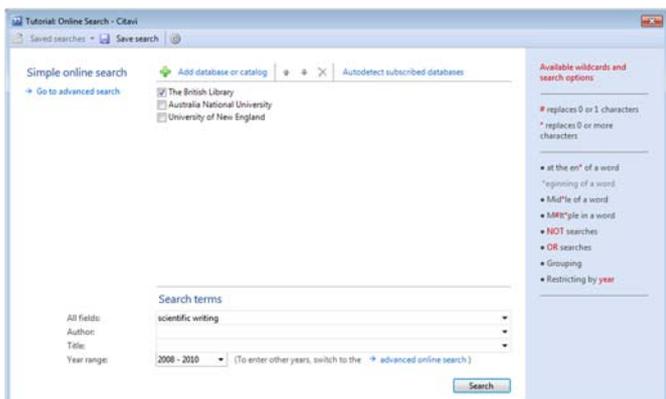
1 Add a catalog Make sure you have an Internet connection, click **Online search**, and then click **Add database or catalog**.



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

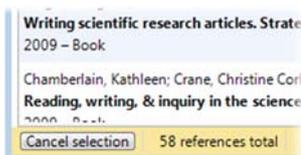
In the **Name** field, enter a key word, such as "London" to find catalogs in London. This finds the London Public Library, the library of London Metropolitan University, and more. Select the ones you want to add, and then click **Add**. Continue entering search terms until you have added all the catalogs 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 results containing *all* of the search words. Pay attention to the Quick Help texts: they give you tips for building your search. Click **Search** to run the search.



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, Firefox, Google Chrome, and Adobe Acrobat and Adobe Reader.

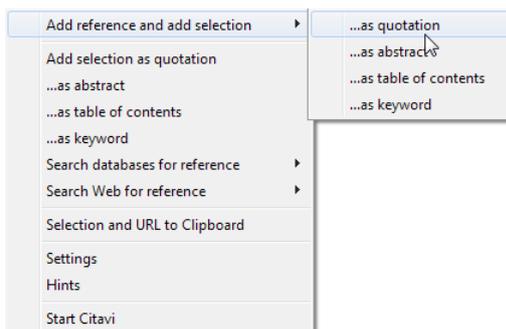
The Pickers make it easy to add Internet documents to your project and to save text passages and images in Citavi with just a click.

If you install Citavi on a USB flash drive, the Pickers will not be available.

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

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 webpage 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 webpage, 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 often include hard line breaks. To get flowing text, double-click a quotation, etc. in Citavi to open it, and then press **Ctrl+Shift+Space**.

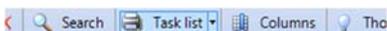
5 Planning Tasks

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

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



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

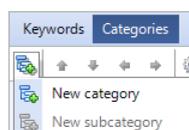


➌ **Hint: Create a Project Task** In the **Task Planner**, you can also create **Project tasks**, which do not apply to a specific reference. This is good for major deadlines, deliverable dates, etc.

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.

➊ **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.

➋ **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.

➌ **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.

➊ **Add Text Quotations** You already know how to add a quotation with the Picker (see section 4). 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.)

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

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

➍ **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**.

➎ **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, thoughts, and ideas, you can use the **Compilation** feature to create a printout sorted by category, with subheadings intact.

➊ **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 with Word

With Citavi's Add-In for Word (Version 2003 and later) you can enter references and quotations into your document formatted exactly as your citation style prescribes. The bibliography is updated in real time to match.

Do you work with Writer or a TeX editor? Please see our user manual: www.citavi.com/manual4

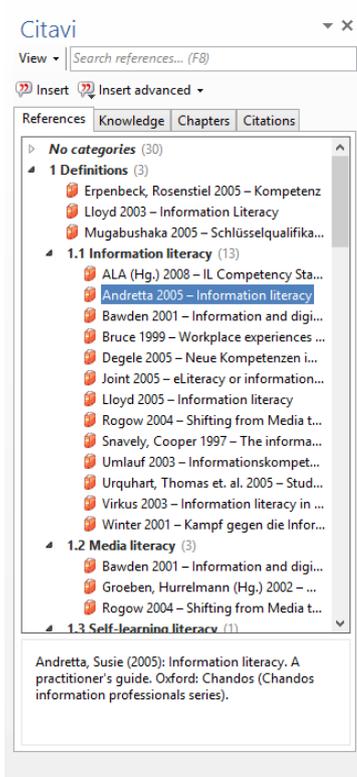
1 Assign a Project to Your Document Open a file in Word. On the **Citavi** ribbon, click **Citavi pane**. Select a project to assign to the document.

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

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

3 Insert Categories If you used categories to structure your knowledge items (as described in section 6), insert your categories as heading. Right-click a category on the **References** or **Knowledge** tab. Click **Insert as heading**.

4 Hint: Use the Chapter View After inserting categories as headings, click the **Chapter** tab to only view the references and knowledge items for the chapter in which the cursor is located.



reference. In the shortcut menu you can then select the form you want to use.

5 Insert References On the **References** tab, select the reference you want to insert. Either click **Insert** or double-click the reference.

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

7 Change the Form For in-text citation styles using the author and year, you can easily change the form of the citation. Options include (Doe 2013), Doe (2013), Doe 2013, only Doe or only 2013. To choose an alternate form, select the reference and click **Insert advanced**. Alternatively, you can right-click an already inserted

8 Enter Page Numbers If you insert quotations from your project, Citavi will insert the page numbers automatically. Alternatively, you can insert a reference and then add the page numbers. On the **References** tab, select a reference. Click **Insert advanced**. Enter the page numbers in the page range field. Do not add prefixes or suffixes such as pp. 12-14. Your citation style will do this for you.

9 Entering Multiple Citations First, insert a reference into your document. Then, place the insertion point in the reference you just inserted. Insert additional references. Depending on the citation style, you will end up with a citation that looks like (Doe 2013, Miller 2013, Smith 2010) or [14-16].

10 Editing Multiple Citations Select the multiple citation in the text. Click the **Citations** tab. Near the bottom of the pane



you can delete unwanted references by clicking the red X or you can change the order of citations with the arrows.

10 Creating Project Bibliographies

Sometimes all you need is a simple list of references.

1 Select References If you want a list of all the references in your project, continue to step 2. If you only want one reference or a small number of references to appear in the bibliography, select them using the **Ctrl** key. Then right-click one of the selected references and select **Apply references as selection**. You can use the **Filter** or **Search** features to create a larger selection.

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

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

4 Choose what Your Bibliography Should Include On the **File** menu point to **Print project bibliography** or **Save project bibliography**. You can select **Project bibliography in current citation style**. This will only generate a basic list of references with bibliographic information. To create a list of references grouped by specific criteria, click **Grouped project bibliography**. To create a list of references with quotations, abstracts, evaluations, etc., click **Annotated project bibliography**.

? More Information and Help

Download:
Manual:
Support:

www.citavi.com/download
www.citavi.com/manual4
www.citavi.com/service