

➤ Reference management with Citavi 7

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➤ Overview and Installation of Citavi

What can you expect from today's workshop?

- Installing Citavi & Starting a Project
- Literature Review & Picker
- Knowledge Organization
- PDF Analysis
- Cite
- Writing with Word

What does Citavi do?

- Reduced workload when collecting, sorting, and organizing materials
- Support from the initial literature review to the finished paper

Installation



Information from ZIMT

Citavi 7 is available for download for Windows here:

<https://www.citavi.com/de/download>

*Die Lizenz wird ab 2023 an der Universität Koblenz geführt, die Lizenz ist aktiviert und kann von Beschäftigten und Studierenden unserer Universität verwendet werden. Falls Sie Ihre Anmeldung in einer vorangegangenen Lizenzperiode gespeichert hatten, kann es sein, dass Sie sich noch einmal neu anmelden müssen. Eine Vertragsverlängerung bis 01.01.2029 ist geschehen. Allgemeine Hinweise finden Sie auf den Seiten von Citavi [auf englisch](#) und [auf deutsch](#). Zur Aktivierung der neuen Lizenzen 2026 müssten Sie von "Citavi Account" eine E-Mail bekommen (haben). Gehen Sie bitte zur Aktivierung der Lizenz wie unten unter **Campus-Lizenz abrufen** beschrieben vor. Unter "https://community.lumiverso.com/s/article/lizenzen-fuer-alte-citavi-versionen-beziehen?language=en_US" können Sie erfahren, wie Sie ältere Versionen nutzen können.*

Citavi 6 oder 7 können Sie für Windows hier herunterladen: <https://www.citavi.com/de/download>. Für Geräte unter MacOS oder anderen Betriebssystemen verwenden Sie bitte Citavi Web. Sie können sich

Link to the manual: https://www1.citavi.com/sub/manual7/en/index.html?installing_citavi.html

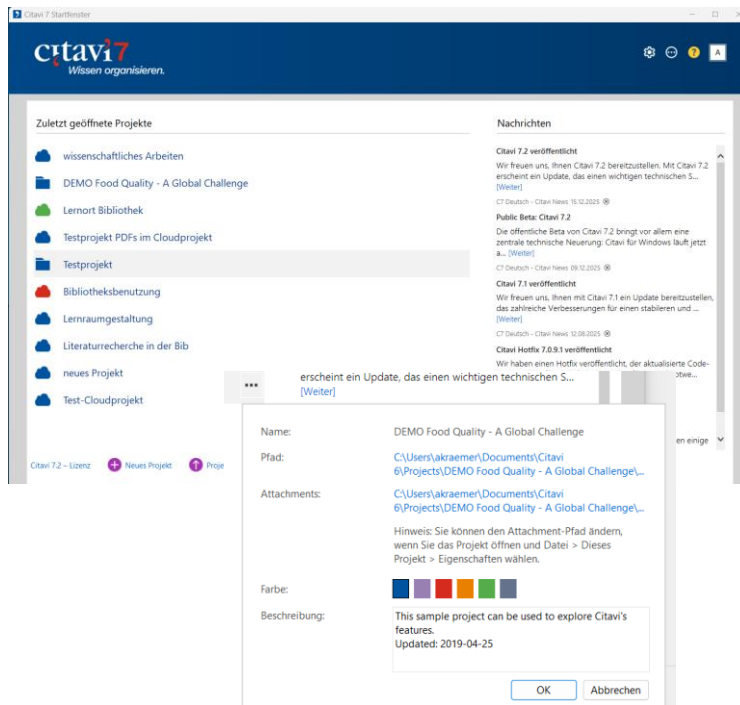


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➤ How do I manage a project in Citavi?

Open Citavi: Overview of the Homepage



- Retrieve the license
- Creating new projects
- Open existing projects
- Information about the storage location
- Local Projects / Cloud Projects
 - Local projects: Saved in Documents\Citavi 7\Projects
 - Cloud Projects: Storage in the Citavi Cloud; Teamwork and remote access available

Save projects

- Citavi automatically saves all entries immediately. You don't need to click a Save button.
- If you use local projects, Citavi helps you back up your data: Whenever you exit Citavi, it creates backup copies of the most recently modified local projects in the Documents\Citavi 7\Backup folder

Link to the manual :

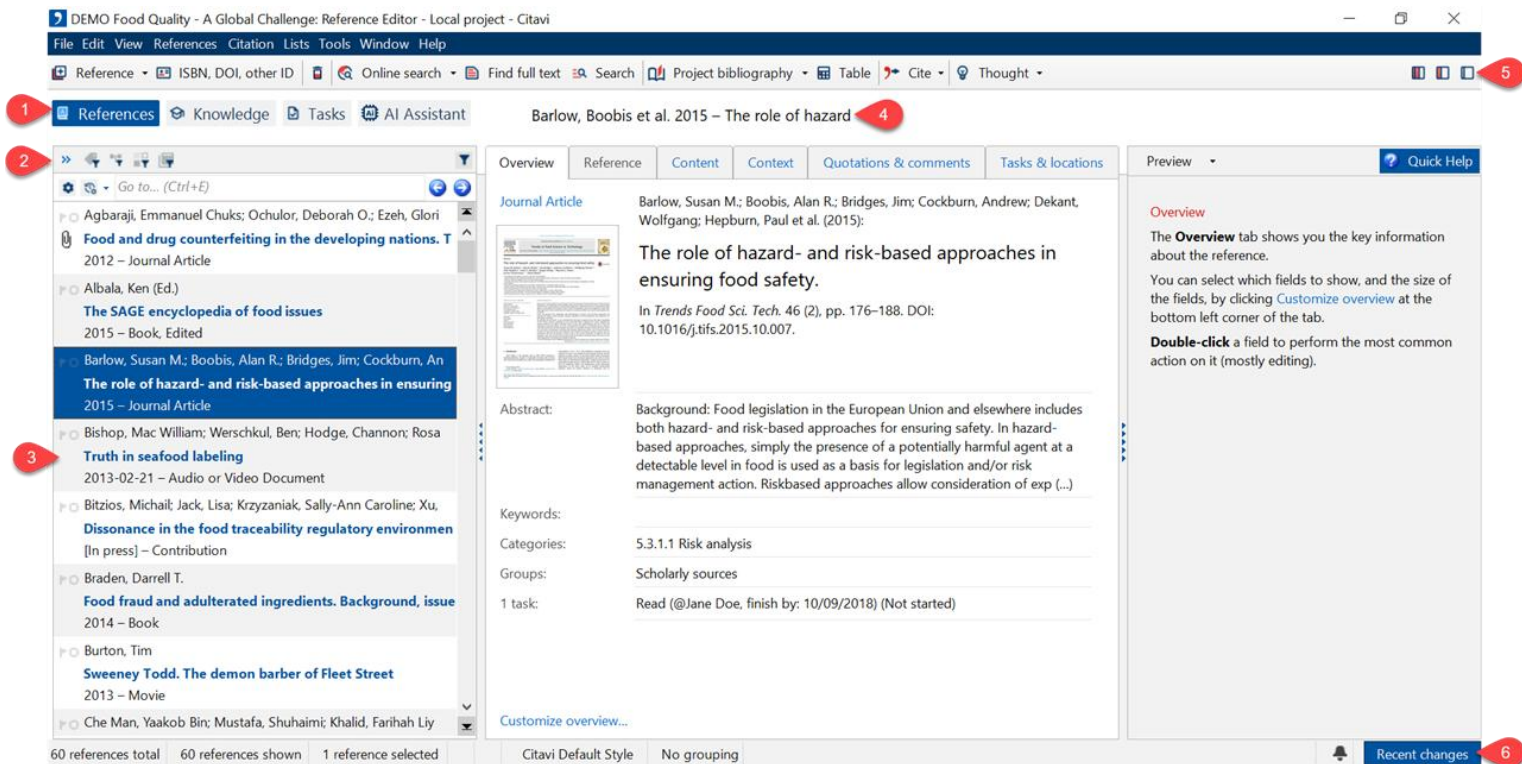
https://www1.citavi.com/sub/manual7/en/index.html?101_backing_up_your_projects.html



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➤ Citavi at a Glance



- 1 Switch between the Reference Editor, Knowledge Organizer, and the Task Planner.
- 2 Use the quick filter or display the keywords, categories, groups, or import groups column.
- 3 All references in the project are displayed in the navigation pane.
- 4 The short title is automatically generated by Citavi.
- 5 Switch between different layout views.
- 6 Switch between different layout views.

The Citavi interface

Link to the manual :

https://www1.citavi.com/sub/manual7/en/index.html?citavi_at_a_glance.html



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**➤ Enter bibliographic
information**

Adding References

- Adding a Book by Hand
- Adding a Contribution in an Edited Book
- Add books via ISBN search
- Selecting Catalogs for ISBN Download
- Importing PDF files
- Use Citavi Picker
- Use the AI Assistant
- Attach files

Link to the manual :

https://www1.citavi.com/sub/manual7/en/index.html?101_citavi_adding_references.html

Adding a Book by Hand

The Document type specifies
the display in
Bibliography.



Link to the manual :

https://www1.citavi.com/sub/manual7/en/index.html?101_adding_a_book_by_hand.html

Adding a Contribution in an Edited Book

The screenshot shows the Citavi Reference Editor interface. A dialog box titled 'Choose reference type' is open, with 'Book, Edited' selected. A tooltip for 'Edited Book' provides a definition and instructions. In the background, the 'Reference' details for 'Singh, Om V.; Harvey, Steven P. (Eds.) Sustainable Biotechnology. Sources of Renewable Energy 2010 - Book, Edited' are visible, with the 'Add contribution' button highlighted.

Choose reference type

- Book, Edited
- Book
- Journal Article
- Archive Material
- Audio Book
- Audio or Video Document
- Collected Work
- Conference presentation or lecture
- Conference Proceedings
- Contribution in...
- Contribution in Legal Commentary
- Court Decision
- File
- Internet Document
- Interview Material
- Legal Commentary
- Manuscript
- Map
- Movie
- Music Track in...
- Musical Work / Music Album
- News Agency Report
- Newspaper Article
- Patent
- Personal Communication
- Press Release
- Radio or TV Broadcast
- Radio Play (Audio Drama)
- Report or Gray Literature
- Software
- Special Issue
- Standard
- Statute or Regulation
- Thesis
- Unknown

Edited Book

A single or multi-volume work with discrete contributions from various authors which is compiled by one or more editors. Includes dictionaries and encyclopedias.

An edited book which does not have a publisher should be added with the **Report or Gray Literature** reference type.

Cf. Conference Proceedings, Special Issue, and Collected Work.

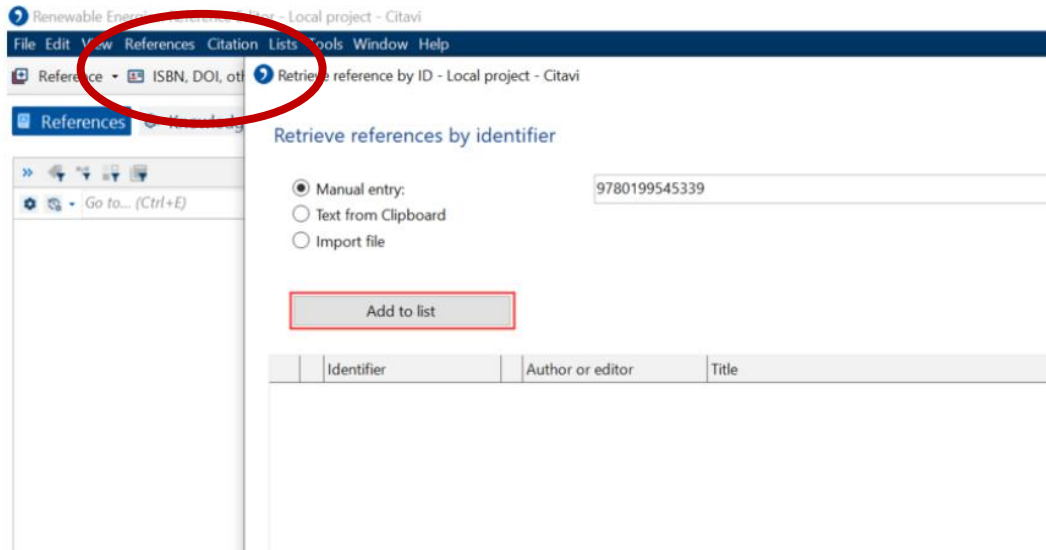
Reference details:

Reference type:	Book, Edited
Editor:	Singh, Om V.; Harvey, Steven P.
Title:	Sustainable Biotechnology
Subtitle:	Sources of Renewable Energy
Title supplement:	0 contributions Add contribution
Add'l editors:	
Organization:	
Year:	2010
Place of publication:	Dordrecht
Publisher:	Springer Science+Business Media B.V
Number of volumes:	
Edition:	

Link to the manual :

https://www1.citavi.com/sub/manual7/en/index.html?101_adding_a_contribution_in_an_edited_book.html

Adding a Book by ISBN Number

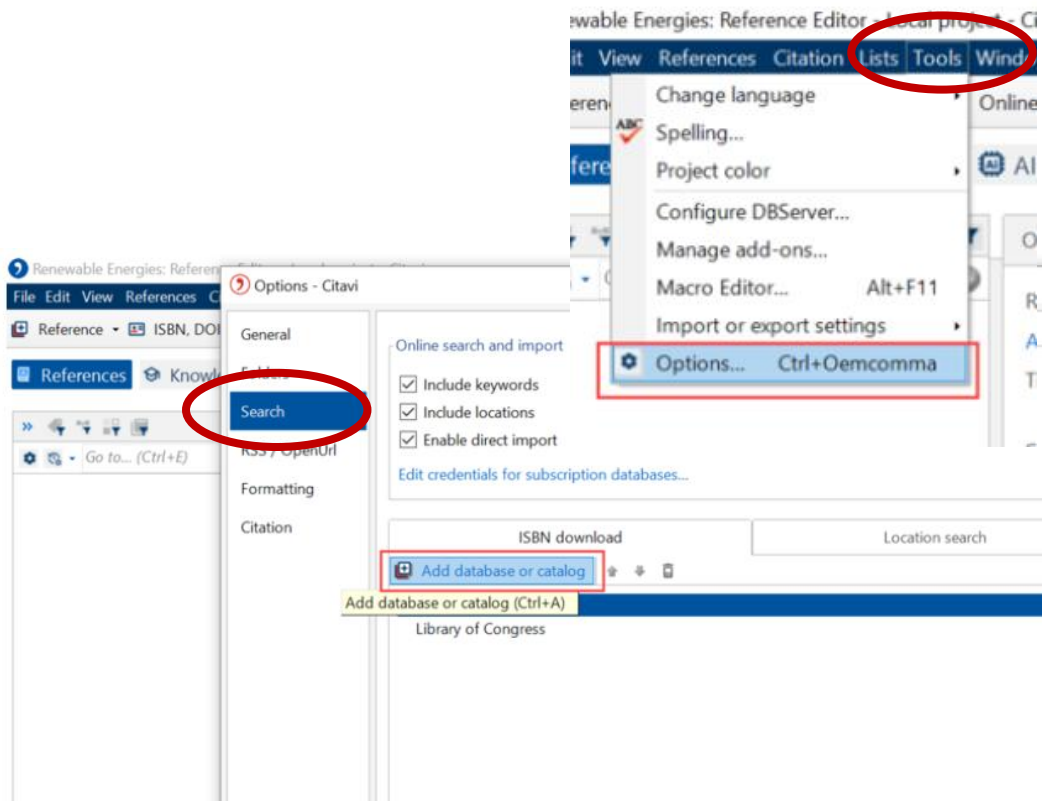


This feature allows you to quickly add a single ISBN or an entire list of ISBNs to your project.

Link to the manual :

https://www1.citavi.com/sub/manual7/en/index.html?101_adding_a_book_by_isbn_number.html

Selecting Catalogs for ISBN Download



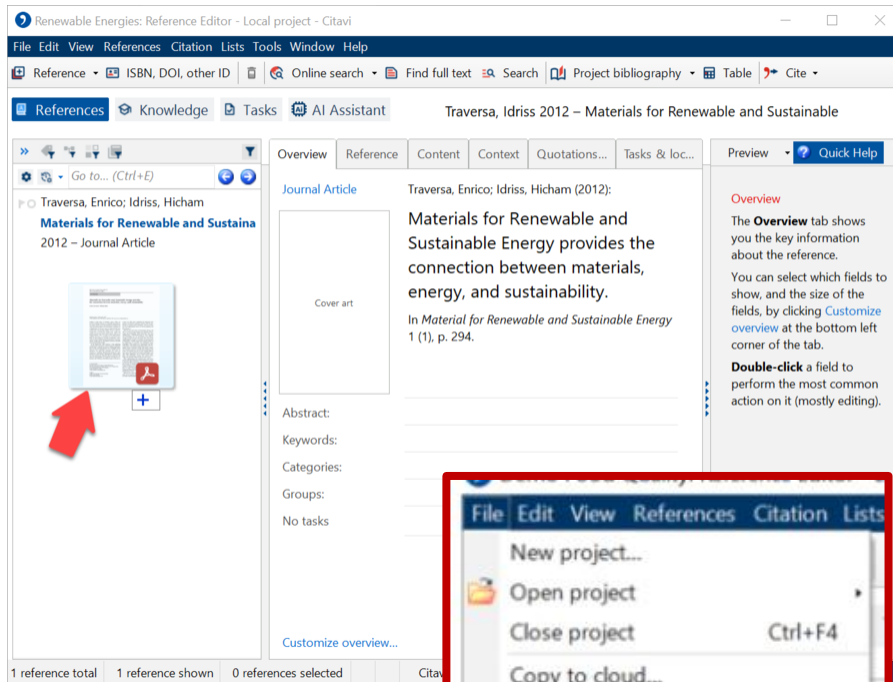
In Citavi you can choose which catalogs or databases should be used for the ISBN download. Citavi imports the bibliographic information from the first catalog in which the book was found.

For this reason, we recommend that you set Citavi so that it always searches first in the library catalog you use most often. This allows you not only to import the bibliographic information for a book, but also its call number in the library you use.

Link to the manual :

https://www1.citavi.com/sub/manual7/en/index.html?101_selecting_catalogs_for_isbn_download.html

Importing PDF Files



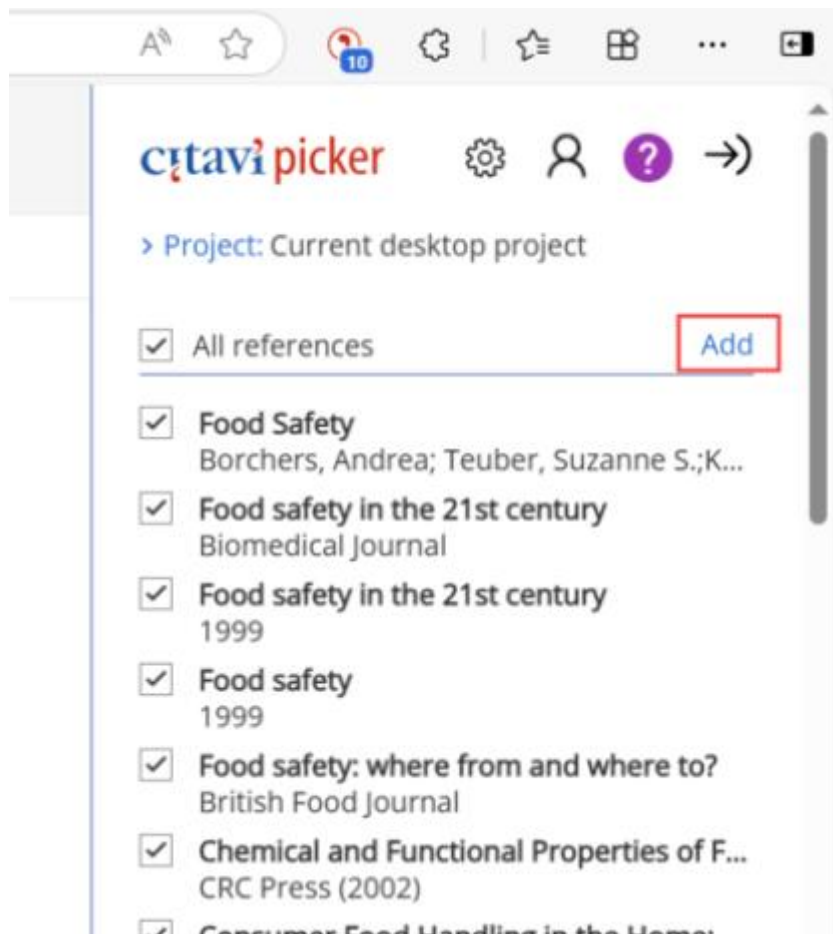
You can import scholarly articles in PDF format directly into Citavi. Citavi creates a new entry for each PDF file and retrieves the bibliographic data if it finds a DOI or ISBN on the first five pages of the PDF file. To import a PDF file, drag and drop it from your computer to the left column (title list).

If you want to import multiple PDF files, select the **File** menu in the reference manager and choose the **Import** command.

Link to the manual :

https://www1.citavi.com/sub/manual7/en/index.html?101_importing_pdf_files.html

Working with Citavi Pickers



With the Citavi Pickers you can quickly add webpages, PDF documents, and information for books or journal articles you find online.

Pickers are available for current versions of Google Chrome, Microsoft Edge and Mozilla Firefox. Your browser must have JavaScript enabled. The Pickers are automatically installed along with Citavi.

You can save images as image citations or covers. The Pickers make it easy to import interesting references from the internet into your Citavi project.

Link to the manual :

https://www1.citavi.com/sub/manual7/en/index.html?citavi-picker_overview.html

Using the AI Assistant

Using the AI Assistant, you can use generative AI (By Semantic Scholar) to look up for research papers. You may review the suggested references and save them to the project.

Enter your search term(s)

Apply this filter to view only references with PDF.

Select reference(s)

More Results

Add to project

DEMO Fake Food - A Global Problem: Reference Editor - Cloud project - Citavi

File Edit View References Citation Lists Tools Window Help

Reference ISBN, DOI, other ID Online search Find

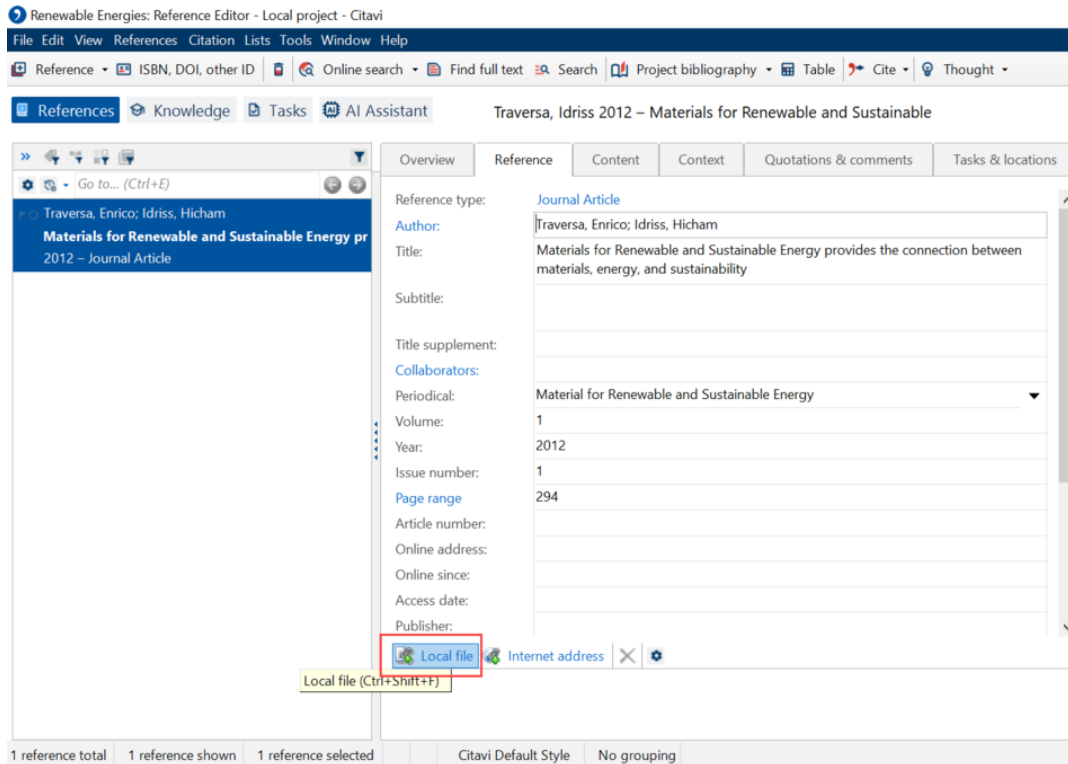
References Knowledge Tasks AI Assistant

Link to the manual :

https://www1.citavi.com/sub/manual7/en/index.html?101_ai_assistant.html

Link to semantic scholar: [DBIS - Semantic Scholar](#)

Linking a File to a Reference



You can add as many files as you want to a reference, including the PDF copy of a book's table of contents, the full text of an article, etc.

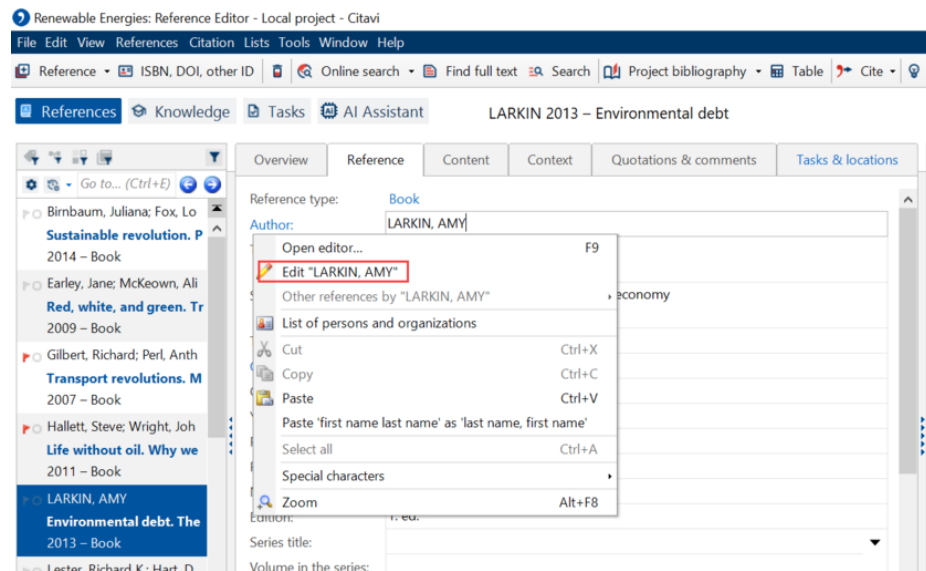
Link to the manual :

https://www1.citavi.com/sub/manual7/en/index.html?101_linking_a_file_to_a_reference.html

Managing Lists

Citavi saves entries that are likely to recur in the following lists: **Persons and organizations, Periodicals and series, keywords** etc.

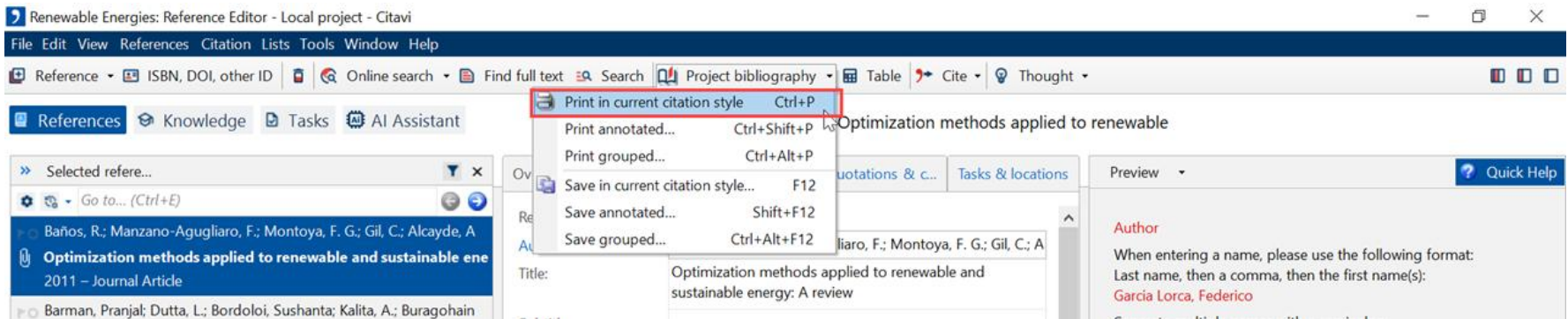
When you add a new reference manually and enter the first few letters, Citavi will suggest entries from the corresponding list. Although lists are saved automatically in the background, there are times when you might want to work with them directly.



Link to the manual : https://www1.citavi.com/sub/manual7/en/index.html?101_managing_lists.html

Creating a Project Bibliography

You can quickly generate a formatted list of references in your Citavi project. You can choose between simple, grouped, and annotated project bibliographies. You can quickly generate a formatted list of references in your Citavi project. You can choose between simple, grouped, and annotated project bibliographies.



You can save the bibliography in PDF or HTML format to publish it online. To do this, select the **File** menu in the print preview and choose the **Export to a new file** command. Select the desired file type.

Link to the manual : https://www1.citavi.com/sub/manual7/en/index.html?101_project_bibliographies.html



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➤ Analyzing literature and planning assignments

Applying Keywords

You can apply as many keywords as you want to each of your references.

Click the **Context** tab.

The screenshot displays the Citavi Reference Editor interface. The window title is "Renewable Energies: Reference Editor - Local project - Citavi". The menu bar includes "File", "Edit", "View", "References", "Citation Lists", "Tools", "Window", and "Help". The toolbar contains icons for "Reference", "ISBN, DOI, other ID", "Online search", "Find full text", "Search", "Project bibliography", "Table", "Cite", and "Thought". The main area is titled "Rifkin 2011 - The third industrial revolution". The "Context" tab is selected and highlighted with a red box. The reference details are as follows:

- Book** by Rifkin, Jeremy (2011): "The third industrial revolution. How lateral power is transforming energy, the economy, and the world." New York: Palgrave Macmillan.
- Abstract:** "We are undergoing a historical transformation in the way we create and disseminate energy. Together, Internet technology and the reality of renewable energy are creating a new ty (...)"
- Keywords:** (empty field)
- Categories:** (empty field)
- Groups:** (empty field)
- No tasks**

The right sidebar shows the "Overview" tab with the following text:

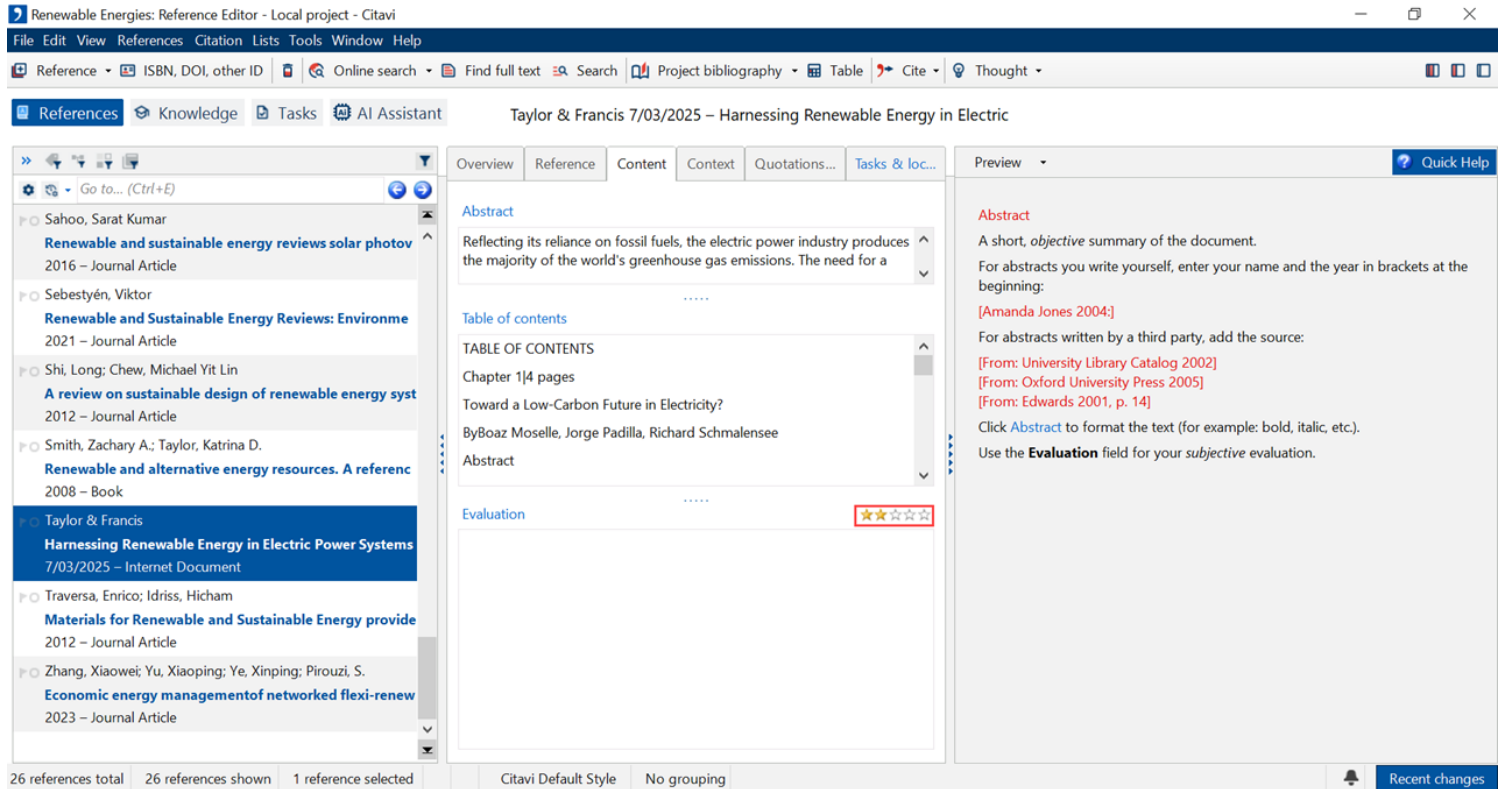
Overview
The **Overview** tab shows you the key information about the reference.
You can select which fields to show, and the size of the fields, by clicking **Customize overview** at the bottom left corner of the tab.
Double-click a field to perform the most common action on it (mostly editing).

At the bottom of the interface, it shows "17 references total", "17 references shown", "1 reference selected", "Citavi Default Style", "No grouping", and a "Recent changes" button.

Link to the manual : https://www1.citavi.com/sub/manual7/en/index.html?101_applying_keywords.html

Evaluating a Reference

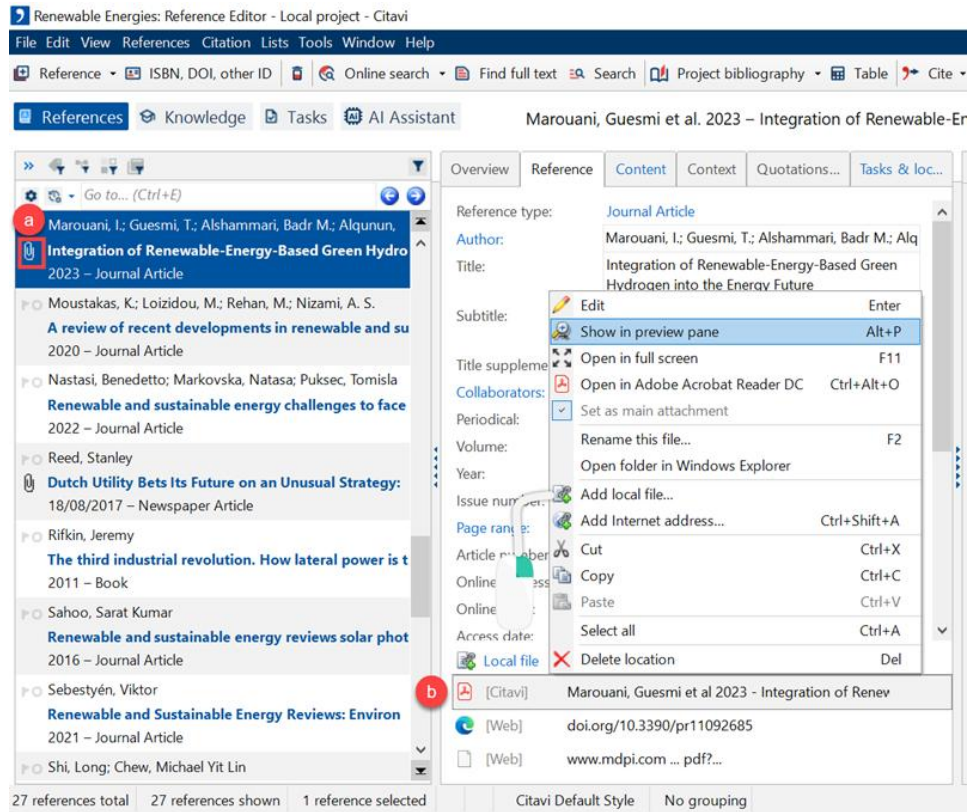
You can use evaluations and ratings to assess the importance of a work for your project. In the **Evaluation** field you can explain your assessment. Use the **Stars** to quickly evaluate a reference.



Link to the manual : https://www1.citavi.com/sub/manual7/en/index.html?101_evaluating_a_reference.html

Annotating PDF Files

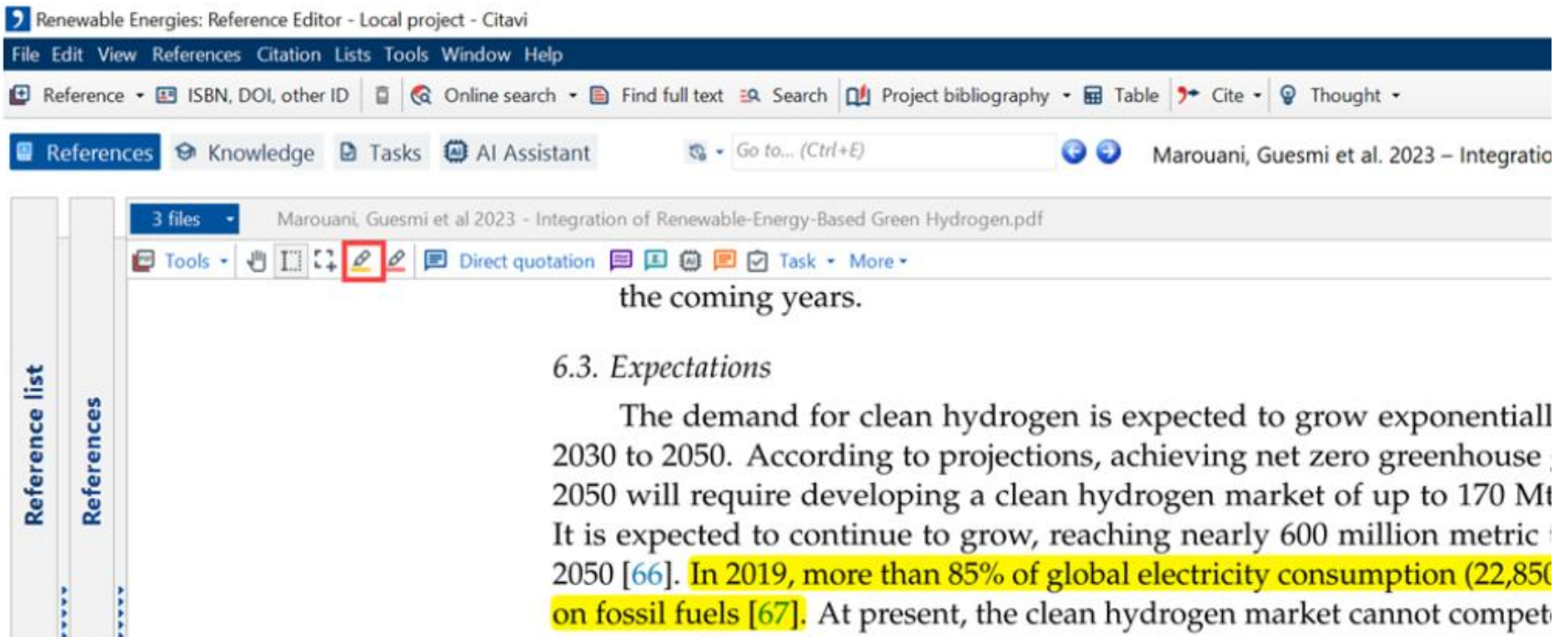
The Preview feature in Citavi offers a number of tools for analyzing and annotating texts.



Open the file in the **Preview**. Either click the **a** paperclip symbol or press **Alt+P** or right-click the **b** file name and then select **Show in preview pane**.

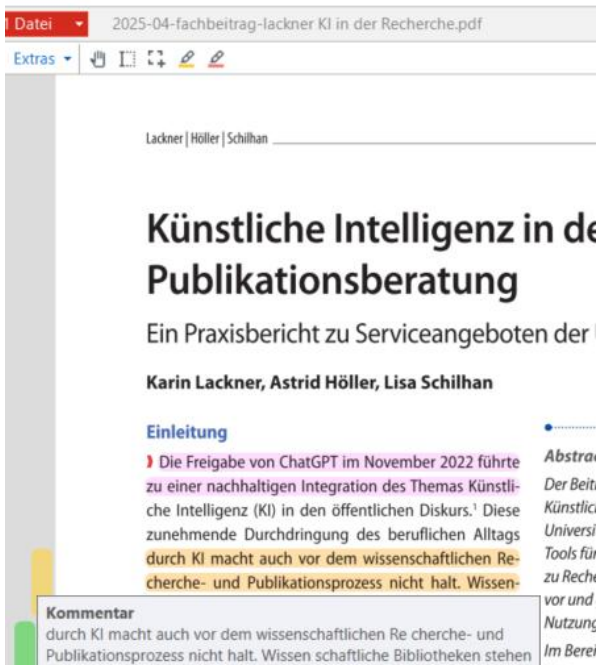
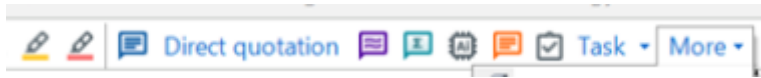
Link to the manual : https://www1.citavi.com/sub/manual7/en/index.html?101_annotating_pdfs.html

Text tools for editing PDFs



- Saving quotes, summaries, AI summaries, and comments
- Highlighting text passages

Tools for editing PDFs



Highlight in yellow: Markings visible only in the PDF for a **quick overview** of the text. Keyboard shortcut: Y.

Highlight in red: For **quickly collecting receipts**. The selection is saved as a key point. Keyboard shortcut: Q.

Highlight in blue (Direct quote): For precise, verbatim text insertion. Keyboard shortcut: D.

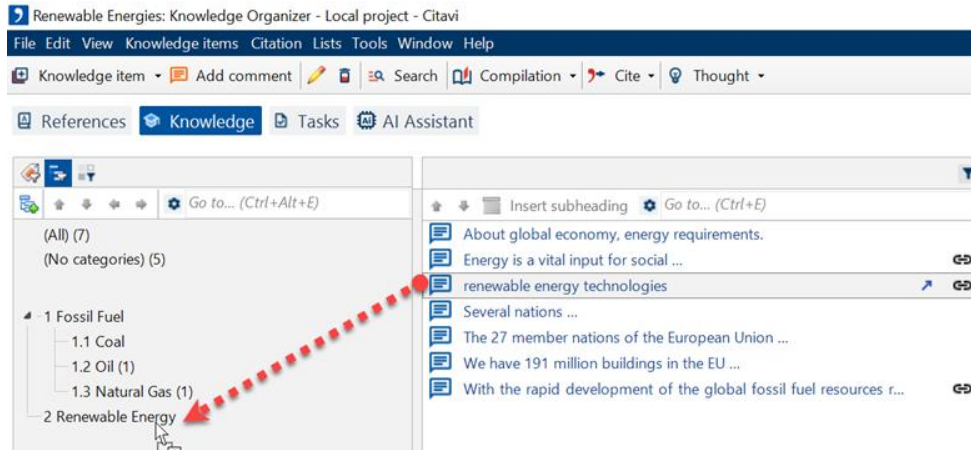
Highlight in purple (Indirect quotation): Restate passages in your own words (paraphrase) Keyboard shortcut: F.

Highlight in green (Summary): The text is highlighted in green, a key point is created, and you summarize the content in your own words. Keyboard shortcut: S.

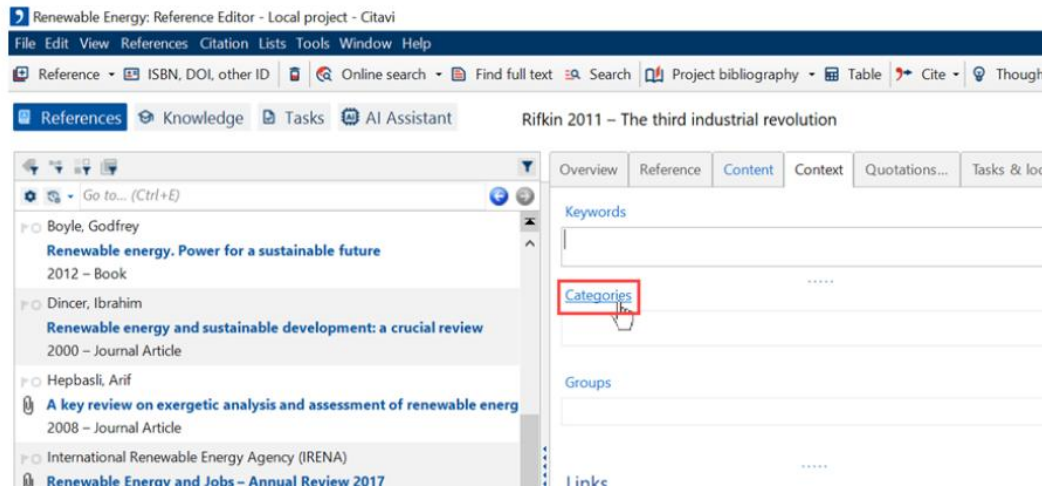
Highlight in orange (Comment): For **comments, ratings, critical feedback** or your own ideas about the text. Keyboard shortcut: C.

Highlight in turquoise (Tasks): To note down **text-related tasks** to be completed later. Keyboard shortcut: T

Systematizing and Structuring



You can use Citavi's category system to organize the content you've collected (ideas, quotes).



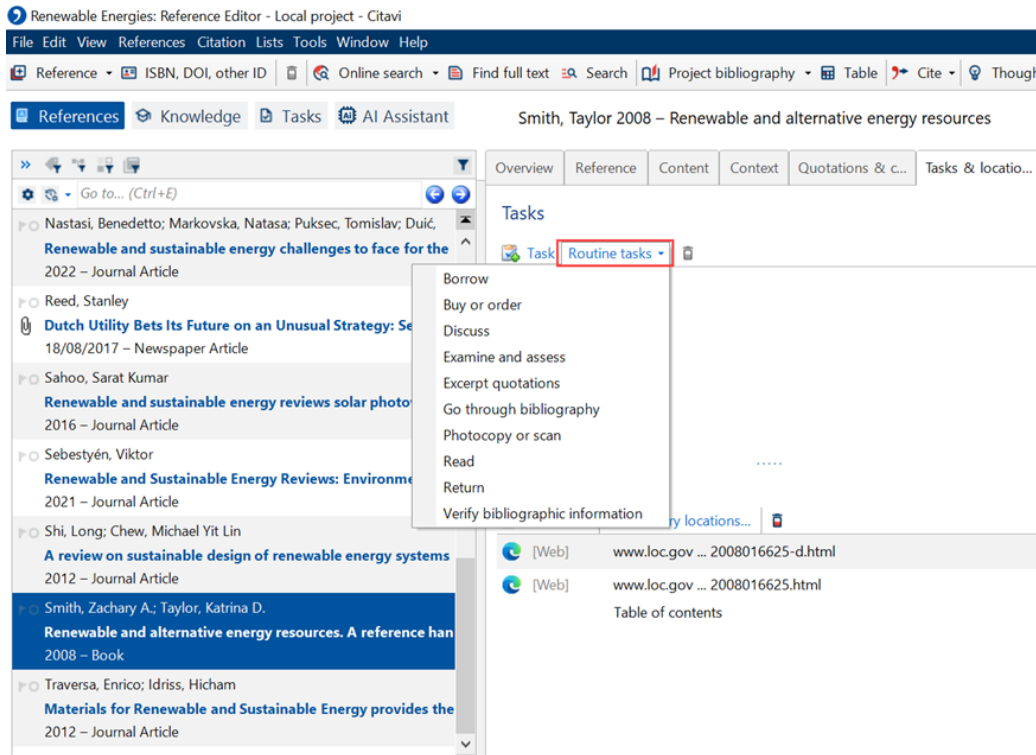
The same category system is available in the reference section of the program, allowing you to organize all entered titles systematically.

Link to the manual :

https://www1.citavi.com/sub/manual7/en/index.html?101_systematizing_and_structuring.html

Planning Your Work

When working with academic literature, certain tasks come up time and again: borrowing and returning books, checking title information, reviewing bibliographies, and much more. Citavi helps you keep track of everything.



Link to the manual :

https://www1.citavi.com/sub/manual7/en/index.html?101_citavi_planning_your_work.html



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➤ Create publication

Using Citation Styles

The citation style determines where citations appear.

Citation styles describe how a reference should be cited in the text and in the bibliography.

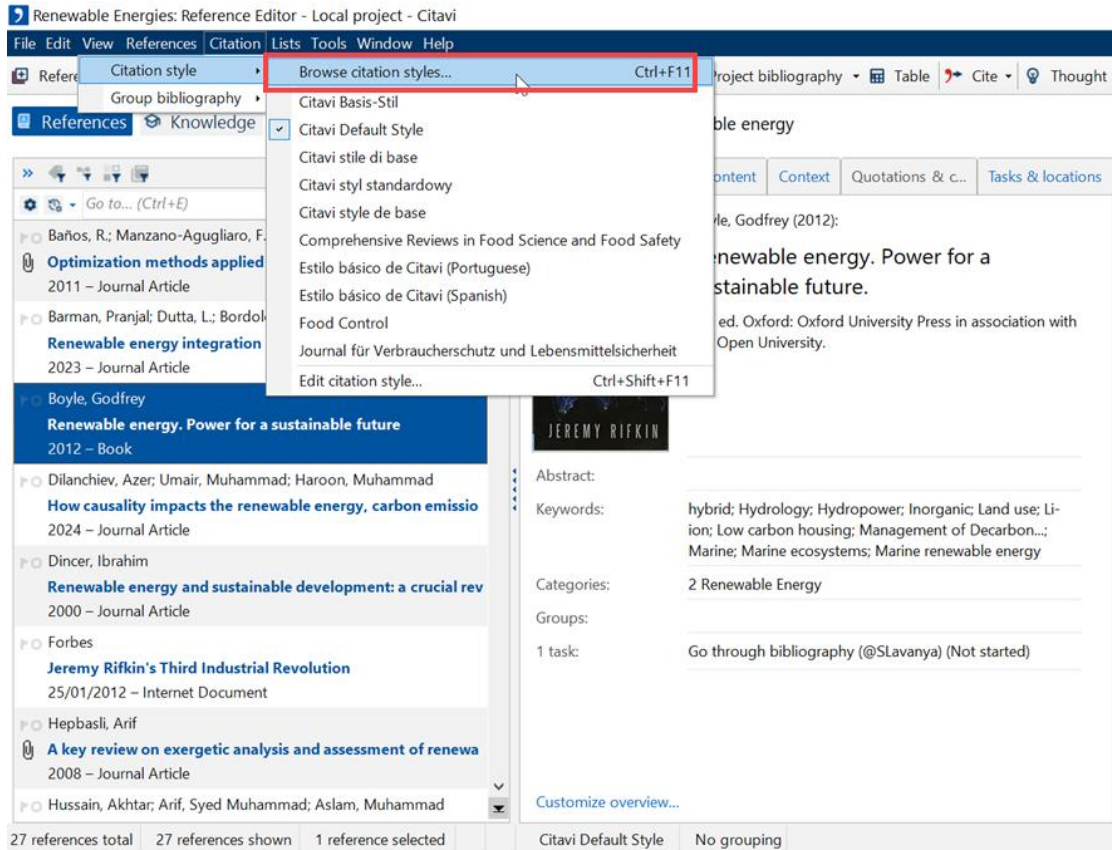
There are two main types of citation styles:

- In **in-text citation styles**, citations appear either in author-date format, in reference number format or as citation keys.
- In **footnote styles**, citations appear either with complete reference information or in author-date format.

Link to the manual :

https://www1.citavi.com/sub/manual7/en/index.html?using_citation_styles_overview.html

Changing Citation Styles



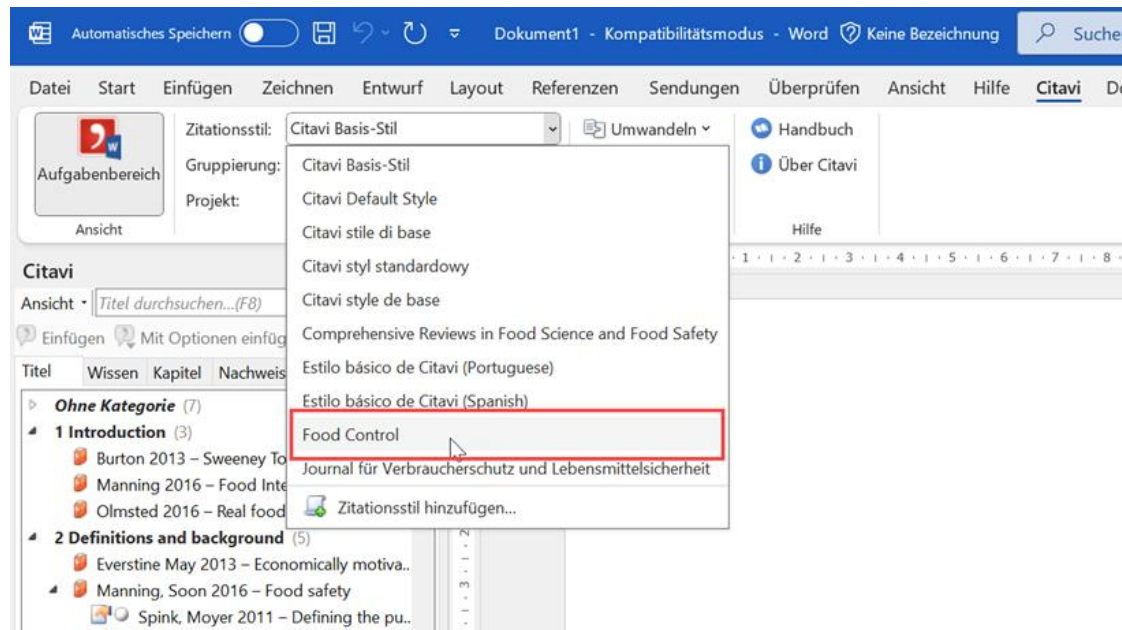
Change the style in the Word add-in as well to format your documents as desired.

Link to the manual :

https://www1.citavi.com/sub/manual7/en/index.html?101_changing_citation_styles.html

Creating Publications with Word

Using the Add-In for Word, you can insert references and knowledge items from your Citavi project into your document exactly as prescribed by your selected citation style. The bibliography is updated in real time with each added or deleted citation.



You can use your categories as headings.

You may also want to insert all the knowledge elements you have collected.

Link to the manual :

https://www1.citavi.com/sub/manual7/en/index.html?wai_creating_publications_with_word.html

Do's and Don'ts

To avoid any issues with the Citavi Word Add-In please read the following chapters

- [Don't Manually Change Citavi Fields](#)
- [Don't Abbreviate Page Numbers with "f." or "ff."](#)
- [Don't Insert Citavi Fields in Frames](#)
- [Don't Insert Citavi Fields in Text Boxes](#)
- [Don't Use the "No Markup" Option in Track Changes](#)
- [Don't Mark Text as "Hidden" in Word](#)
- [Don't Save in ODT Format](#)

Creating Grouped Bibliographies

The "Group Bibliography" feature allows you to divide a bibliography into sections to make it easier to read.

The Citavi manual provides helpful information on how to edit your bibliography step by step.

Link to the manual :

<https://www1.citavi.com/sub/manual7/en/index.html?creategroupedbibliographydialog.html>



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➤ A Look at Citavi Web

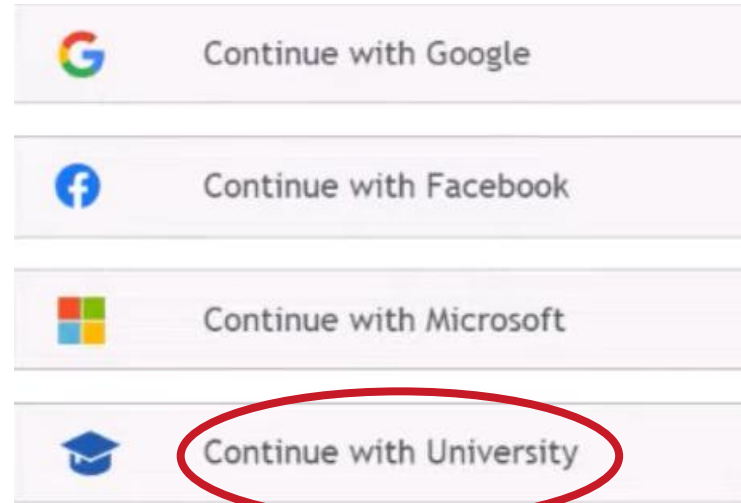
Logging in to Citavi Web

Log in to Citavi Web with your Citavi account.

Launch [Citavi Web](#) in your browser.

Log in to your account. If you don't have an account yet, [register](#).

If you already have a license for Citavi Web, you will be redirected to the start page.



Link to the manual :

https://www1.citavi.com/sub/manual-citaviweb/en/index.html?login_to_citavi_web.html

Link to the video tutorial: <https://youtu.be/8d0ppgSLm3U?si=Nx0CYuralit9a0AC>

Overview of Citavi Web

With Citavi Web, you can work anywhere you have an internet connection—on any operating system, whether Mac OS, Windows, or Linux. All you need is a modern browser.

The screenshot displays the Citavi Web interface. At the top, there is a navigation bar with tabs for 'References', 'Texts', 'Knowledge', and 'Tasks'. A search bar labeled 'Search in PDFs' is also present. Below the navigation bar, the main content area is divided into three sections:

- Show:** A sidebar on the left with options like 'Categories', 'Keywords', 'History', 'Labels', and 'References with PDFs'. A 'Hide' button is visible at the bottom of this sidebar.
- All references:** A central list of references. The top entry is highlighted in blue: 'Farkas, Meredith G. Social software in libraries. Building collaboratio... 2007 - Book'. Other entries include 'Böttger, Klaus-Peter Basiskennntnis Bibliothek. Eine Fachkunde für Fa... 2009 - Book', 'Vampire 2010 - Book', 'Parker, Kendra R. Biting Back, Biting Black: Black Female Vampires... 2015 - Journal Article', 'Vang, Jan Entrepreneurship in Western Europe: a context... 2017 - Journal Article', and 'Nordmann, Romy Handout Citavi 5_Koblenz. Workshop Internet Document'.
- Farkas 2007 – Social software in libraries:** A detailed view of the selected reference. It includes a book cover image and a table of metadata:

Reference	Content	Quotations	Tasks
Reference type	Book		
Author	Farkas, Meredith G.		
Title	Social software in libraries		
Subtitle	Building collaboration, communication, and community Online		
Year	2007		
Place of publication	Medford, NJ		
Publisher	Information Today		
ISBN	9781573872751		
Online address	http://search.ebscohost.com/login.aspx?direct=true&scope=site&db=nlebk&db=nlabk&AN=190988		
DOI name	--		
Source of bibliographi...	GBV Gemeinsamer Bibliotheksverbund		
Language	eng		
Page count	320		

Link to the manual :

<https://www1.citavi.com/sub/manual-citaviweb/en/index.html>

Link „How to start with Citavi Web“: [Citavi Web Tutorial Videos](#)



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➤ Citavi Help Pages

[Citavi 7: Handbuch](#)

Citavi Web: [Citavi Web Handbuch](#)

Citavi Video tutorials: [Citavi in a Nutshell](#)

Download: www.citavi.com/download

Account: www.citavi.com/login

Help & Support: www.citavi.com/support

**➤ THANK YOU VERY
MUCH FOR YOUR
ATTENTION!**

Information:

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