



Library for the faculties Business, Economics, and Social Sciences and Business Administration

# **Reference Manager Citavi**





# Agenda

- Survey: Starting Point
- Overview of reference management programs
- Hands-on exercises with Citavi
  - Capture references (5 exercises)
  - Organize references (3 exercises)
  - Citing with Citavi (2 exercises)
- Questions & Feedback



# **Reference manager (in general)**



## **Available reference management programs (RM)**





# **Advantages of using RM**

- LVP always with you & nothing gets lost!
- Fast storage & quick retrieval of literature.
- Storage of digital full texts
- Individual sorting of titles
- 1000's of standardized citation styles → uniform presentation
- Automatic comparison of cited literature with literature list

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# Which reference management program suits me?

- Operating system: Windows or MAC or other
- Mobility / sharing: Local/web-based/cloud/team or individual work
- Functionality: Reference management program plus?
- **Department/academic area:** Low-threshold support
- License: Which programs are licensed at my university?



# Citavi

- Citavi desktop/Cloud:
  - Windows only
  - Installation necessary
- Teamwork possible
- Only compatible with Word
- UHH license

- Citavi-Web:
  - Windows, Mac & Linux
  - Installation not necessary
- Teamwork possible
- Compatible with: Word & GoogleDocs
- Not licensed at the UHH







# How to install Citavi (at home!)

### Software and license

Information about the installation can be found on the <u>website of the RRZ</u> of the UHH (German only) or in the following tutorial: <u>YouTube Tutorial</u> (0-1:40 Min).

### **Citavi Picker**

Also install the <u>Citavi Picker</u> in the Firefox browser.

### Citavi Plug-in in Word

The Citavi plug-in should now automatically appear in the top right corner of Word.

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# **Change the language settings**





# Start your first project





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# **Activate the Citavi Picker in Firefoxbrowser**

- 1) Open the settings menu in Firefox
- 2) Choose "Add-ons & themes"
- 3) Choose "Extensions" in menu on the left
- 4) Install and enable the "Citavi Picker", if not yet enabled



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	New window	Strg+N
	New private window	Strg+Umschalt+P
	Bookmarks	>
	History	>
	Downloads	Strg+J
_	Passwords	
2	Add-ons and themes	Strg+Umschalt+A

### Reference management with Citavi , Library WISO/BWL

Recommendations



# **Capture references**



## **Practice Sheet**

Download the practice sheet from the Bib WISO/BWL website:

https://www.wiso.uni-hamburg.de/bibliothek/service/beratung-undschulungen/materialien/lvp-citavi-6-exercises-sose-23.pdf

### Schulungsunterlagen

- Installation und Lizensierung (PDF) (Stand: August 2022)
- Alle Übungen der Schulung (PDF) (Stand: August 2022)
- Practice Sheet Workshop (PDF) (Stand: Juni 2023)
- <u>Beispiel-PDFs zum Hochladen</u> (ZIP-Datei)
- Folien der Schulung (PDF) (Stand: April 2023)

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# **Capture references with the Citavi Picker (Exercise 1)**

"Pick" titles by clicking the Citavi sign next to the ISBN number: In Katalog*plus* 



Girl, Woman, other by Bernadine Evaristo

In the Campus-Catalogue:

Kein Kapitalismus ist auch keine Lösung by Ulrike Herrmann

At the online bookstore Buchhandel.de:

Swing Time by Zadie Smith



# **Capture references with the Citavi Picker**





# **Capture titels via ISBN oder DOI – number (Exercise 2)**

Capture references using the "magic wand" function in Citavi.

🔨 🛛 ISBN, DOI, other ID

ISBN: 9781119789758 | 9783030271909 | 9781642593969 DOI: 10.3390/ijerph15040816 | 10.1007/978-981-15-3473-7\_6 10.1007/978-3-031-10437-4\_8



## **Capture titels via ISBN oder DOI – number**

	Retrieve reference by ID - Cloud project - Citavi	×
File Edit View References Citation Lists Tools	Retrieve references by identifier Manual entry: 9783030271909 Import file Add Identifier Add	X Manual entry Type a single identifier (ISBN, DOI, or PubMed ID) and press Enter or click Add. Searching in: • GBV Gemeinsamer Bibliotheksverbund • Osterreichischer Bibliothekenverbund Gesamtkatalog • Schweizerische Nationalbibliothek • Deutsche Nationalbibliothek • The British Library • Library of Congress
	Add to project Close	Click here to select other catalogs.

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# Find and download full text





# **Upload PDFs**

- Drag and drop PDFs from storage (drive, USB, cloud) to the first column of your Citavi project.
- After a few seconds, Citavi displays the reference.
- Verify that Citavi has transferred all the title data.
- If necessary, complete the data manually.





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# **Import individual titles from databases**

 Import individual titles from databases by "picking" the DOI: Example "Business Source Complete"

#### 12. Tabloid Tales: How the British Tabloid Press Shaped the Brexit Vote.



By: Simpson, Kathryn; Startin, Nick. Journal of Common Market Studies. Mar2023, Vol. 61 Issue 2, p302-322. 21p. 6 Charts, 1 Graph DOI: 10.1111/jcms.13386

Subjects: Public opinion polls; Public opinion; Marketing Research and Public Opinion Polling; Brexit Referendum, 2016; Tabloid newspapers; Referendum





# **Import watch lists from databases**

- Save articles in the watch list during your research
- Then import the entire watchlist into Citavi at once
- Example: Business Source Complete
- Attention:
  - Watch lists look different in in different databases
  - Choose the format "Citavi" or "RIS" for importing



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# Enter title manually (if there is no other way...)

- Click "+ Reference"  $\rightarrow$  A new window opens
- Select the appropriate reference type and click OK
- Enter the necessary title data manually
- Attention:
  - Name always in this order: Last name, First name
  - Blue font indicates links, not mandatory fields!



## **Enter title manually 1**



1.06.2023

31



## **Enter title manually 2**

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# **Organize references**



# **Create an outline (with categories)**

- Switch to the *Knowledge* tab in the *References | Knowledge | Tasks* menu.
- In the menu that appears below select the option *Show category column*.
- With the *categories* and *subcategories* you can now create an outline for your academic paper.



# **Exercise 1: Create an outline**

- Introduction
- 2 Main part
  - 2.1 Chapter
    - 2.1.1 Chapter
    - 2.1.2 Chapters
  - 2.2 Chapter
  - 2.3 Chapter
- 3 Conclusion





# **Capture text excerpts from PDF files (Direct quotation 1)**

- Switch to the *References* tab in the menu *References | Knowledge | Tasks* menu.
- Select a title with PDF attachment.
- Edit the PDF in the right column.
- Highlight a short text passage in the PDF file and then click *Direct quotation* in the new menu that appeared above.

1.06.2023



# **Capture text excerpts from PDF files (Direct quotation 2) 1**

- The captured quote is displayed in the middle column. Important: Add the quotation marks!!!
  - The small blue arrow opens the quote in a separate window.



 Add the quotation marks, page number, and category (bullet point) here if necessary.



### **Capture text excerpts from PDF files (Direct quotation 2) 2**

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# **Exercise 2: Capture indirect quotation**

- Select a different title with PDF attachment.
- Highlight a short passage of text in the PDF and then click *Indirect quotation* in the menu at the top.
- Open the quote with the blue arrow // in a separate window.
- Add the text (indirect quotation!), page number and category.



# **Cite references**



# Search & add citation style

- Search the English version of the citation style American Psychological Association short APA:
- In the menu Citation click Citation style, then Browse citation styles
  - Click Find and add style
  - Search by name, citation system, language and/or subject area.
  - Add the desired style to your favorites list.

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### Search & add citation style 1



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# **Exercise 3: Search citation style**

- In the menu Citation click Citation style, then Browse citation styles, then Find and add style
- Choose the name *Harvard*, citation system *In-text citation: author, date*, the language *English* and *All subject areas*.
- Add **SAGE Harvard UK Style** to your favorites list.



# **Exercise 4: Transfer outline and quotes to Word**

- Open Word and click the Citavi tab on the right side.
- Then open the project you are currently working on.
- You will now see the outline you have created.
- Right-click the first category and *insert categories and knowledge items* (quotes, comments, etc.) into Word.



# **Transfer outline and quotes to Word 1**



1.06.2023



# **Exercise 5: Cite in Word with Citavi**

- Add more references to the Word document in the pattern shown below with a click:
- (author date)
- (author date, p. 10)
- author (date)
- (author A; author B)





# Bibliography

An alphabetical bibliography is automatically generated at the end of your document in the selected citation style and updated whenever you edit the document.







# **Questions? Feedback?**



# More Infos and Support



# Materials on the website of the Library WISO/BWL

- Recherch tips (German only)
- Starter Pack for First-Semester Students
- Materials from workshops (mostly German)
- Comparison of reference management programs



# **Information Literacy Working Group**

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Cįtavi Organize your knowledge.



# Good luck with your writing and citing!