



Reference management & Co. with Citavi

(Stand: 06/2023)

Capture references

Exercise 1 | Capture titles with the Citavi picker

Capture references from *Katalogplus* / *Campus Catalogue* / *Online Bookstore*:

Search the catalogs and *Buchhandel.de*. Select the title you are looking for from the hit list. You can "pick" the title by clicking the Citavi sign next to the ISBN number.

Katalogplus (<https://katalogplus.sub.uni-hamburg.de/vufind/>):

Girl, Woman, other by Bernadine Evaristo

Campus-Catalogue (<https://kataloge.uni-hamburg.de/LNG=DU/DB=1/>):

Kein Kapitalismus ist auch keine Lösung by Ulrike Herrmann

Buchhandel.de (<https://www.buchhandel.de/>):

Swing Time by Zadie Smith

Exercise 2 | Capture titles with ISBN or DOI

Click the menu item with the *magic wand* (ISBN, DOI, other ID). A new window opens. Enter the *ISBN* and *DOI* and press Enter or the *Add* button. Citavi searches for the matching reference and displays it in the field below. If you want to add the title to your project, click the button *Add to project*.

ISBN: 9781119789758 | 9783030271909 | 9781642593969

DOI: 10.3390/ijerph15040816 | 10.1007/978-981-15-3473-7_6 | 10.1007/978-3-031-10437-4_8

Exercise 3 | Import titles from databases (individual titles, watch lists)

Individual

Open the databank *Business Source Complete* (<https://dbis.ur.de/SUBHH/resources/5660>). Enter the search term *Brexit* and narrow the search to *Scholarly Journals*. Press Enter. Select an article with Citavi Picker icon from the results list and pick it.

Watch list

Go back to your hit list. Save 3 items in your watch list by clicking the folder icon on the right. Then open your watch list in the menu bar on the top right. Select all articles and export the watch list (Direct Export to RIS format) by clicking *save* and selecting *Open with Citavi (default)* in the window that opens.



Then switch to Citavi. There a new window has opened, in which the character encoding for the individual titles can be checked. Click *Next* until another window opens for importing the data. Select the *Add to project* button to import the titles into your project.

Import via watch lists works for many databases: e.g. ABI/INFORM Collection, WiSonet, EconLit, Web of Science.

Exercise 4 | Upload PDFs

Download the zip file [PDFs zum Hochladen](#) and unzip the file in your download folder.

Then *drag and drop* the PDFs into the first column of your Citavi project. Did Citavi capture all the title data? If not, add the data manually.

Exercise 5 | Find full texts for existing titles

Click the *Find full texts* button in the menu to start the search. Have Citavi look for the full texts of references (articles, essays, and contributions from collected works) that you have already included in your project. A list of the full texts found is displayed. Import the full texts by clicking *Add*.



Organize your references

Exercise 6 | Create an outline (categories)

In the *References / Knowledge / Tasks* menu, switch to the Knowledge tab. In the menu that appears, select **Show category column**. Create the category scheme below by clicking on **New category** or **New subcategory**. Use the blue arrows to move individual elements.

Example outline:

1. Introduction
2. Main part
 - 2.1. Chapter
 - 2.2. Chapter
 - 2.3. Chapter
3. Conclusion

Exercise 7 | Capture text excerpts (tab: quotations, comments)

- 1) Switch back to the Reference tab. Select a title with a PDF attachment. The PDF file is displayed 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.
- 2) The captured quotation will be displayed in the middle column. Important: Add quotation marks: The small blue arrow opens the citation in a separate window where you can add quotation marks, page number and category.
- 3) Mark another text excerpt and capture it as an indirect quotation  . Instead of adding quotation marks, now write the indirect quotation.

Exercise 8 | Assign quotations to the outline

Match the quotations to the appropriate parts of your outline.

Right-click on a citation and assign it to a category. Assign a category to the other citations as well, If necessary, the outline can also be adjusted again by adding new (sub)categories (=outline points).



Cite with Citavi

Exercise 9 | Choose a citation style

Select the desired citation style in the **Citation styles** menu. If the style you are looking for is not available, you may have to import the citation style first: To do this, click on **Citation » Citation styles » Browse citation style**. A new window will open. Click on **Find and add style**. Another window opens.

Search for the style "APA" and the language "English". Add the style **APA American Psychological Association, 7th ed. (English)** to your list.

Exercise 10 | Create a bibliography

Click the triangle at the pull-down menu item **Project bibliography** and select the option **Save in current citation style**. The generated bibliography will automatically open in Word.

Exercise 11 | Transfer Citavi outline and citations (categories + knowledge elements) to Word

Open Word. On the right side, you will see a **Citavi tab** in the menu. Click the Citavi tab and then open the project you are working on. You will now see the outline you created on the left. Right-click on the first category and paste all categories and knowledge elements (citations, comments, etc.) into Word.

Exercise 12 | Cite in Word with Citavi

Now insert further references in the patterns shown below into your Word document. An alphabetical bibliography is automatically generated at the end of the document.

Muster Literaturhinweise:

(author date)

(author date, p. 10)

author (date)

(author date A; author date B)



Tips & Tricks for Beginners

- Double check all entries you import via the picker or the magic wand (ISBN/DOI) to make sure you have imported the desired titles.
- Don't use all the features while writing your first academic texts with Citavi. Get familiar with the system first.
- Never import all hits from your online search if you have more than 10. Choose carefully what you import, otherwise you end up with lots of titles that are irrelevant for your work.



Bibliothek WISO/BWL

Team Informationskompetenz:

Phone.: +49 40 42838-5605 (Sabine Rauchmann – coordination, literature research)

Phone.: +49 40 42838-8812 (Elena Pencheva – coordination Business and Economics Library)

Phone.: +49 40 42838-4662 (Ute Lehmann – coordination Social Sciences Library)

Phone.: +49 40 42838-3560 (T Bleck – Citavi/Zotero)

E-Mail: bib-schulung.wiso@uni-hamburg.de

Website: www.wiso.uni-hamburg.de/bibliothek