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
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
Exercises
How to install Citavi (at home!)

Software and license

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

Citavi Picker

Also install the Citavi Picker in the Firefox browser.

Citavi Plug-in in Word

The Citavi plug-in should now automatically appear in the top right corner of Word.
Change the language settings
Start your first project

1.06.2023  Reference management with Citavi, Library WISO/BWL
Activate the Citavi Picker in Firefox browser

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
Capture references
Practice Sheet

Download the practice sheet from the Bib WISO/BWL website:
Capture references with the Citavi Picker (Exercise 1)

"Pick" titles by clicking the Citavi sign next to the ISBN number:

**In Katalogplus**
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

Secondary Edition: [Online-Ausgabe]

Links:
- Cover
- Contents

ISBN: 978-1-4875-7471-0

DOI/URN: 10.3138/9781487574710/1
Capture titles via ISBN oder DOI – number (Exercise 2)

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

**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 titles via ISBN oder DOI – number
Find and download full text

Cezarino, Liboni et al. 2023 –
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.
Reference management with Citavi, Library WISO/BWL
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.


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

Cited References: (44)
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 different databases
- Choose the format "Citavi" or "RIS" for importing
Import watch lists 1

- Direct Export in RIS Format (e.g. OSWA, EasyBib, EndNote, ProCite, Reference Manager, Zotero)
Import watch lists 2

1. Open project
2. Import - Cloud project - Citavi
3. Select the format the bibliography
   - Text file (RIS, BibTeX, etc.)
   - PDF files
   - File containing tabular data
   - Formatted bibliography
   - New online search
4. Import - Cloud project - Citavi
5. Select the data or file to import:
   - Use text from the Clipboard
   - Import a text file
   - RIS
5. Browse

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Reference management with Citavi, Library WISO/BWL
Import watch lists 3
Import watch lists 4

To add all displayed references to your project, click Add to project.
To add specific references only, first select the corresponding checkboxes and then click Add to project.
Enter title manually (if there is no other way...)

- Click „+Reference“ → 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

All available reference types

Your favorites
Enter title manually 2

Add data manually
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

- 1 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.
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
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.
Search & add citation style 1
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

Click here!
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.
References


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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Good luck with your writing and citing!