



Government of **Western Australia**  
Department of **Mines, Industry Regulation  
and Safety**

# Citavi quick guide



**Geological Survey of  
Western Australia**

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1.0	9/7/20021	Revisions by Stephen White and E&P team
1.1 Citavi 6.14	18/5/2023	Revisions by Bernd Striewski and E&P team

# Citavi quick guide

## What is Citavi 6?

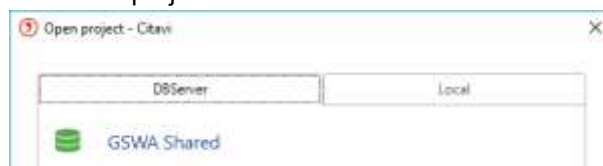
- Centralized database of bibliographic references cited in GSWA publications
- Citavi 6 automatically manages, formats and updates the reference list of MS Word documents

## Opening Citavi 6

- Click on **Start** button → **Citavi 6**  or on the desktop icon 
- Alternatively, the Citavi program will start when the project is opened from the add-in installed with MS Word

## Configuring Citavi 6

- On the Citavi 6 **Welcome** screen click on the **Settings** cog wheel and select **Configure DBServer...**
- Use the **Connection** hyperlink to open the **Connection Properties** dialog and, in the field **Server name**, type: SQLP2\PRD2
- Turn on radio button for **Select or enter a database name:** and in the field below select **Citavi** from the drop down list
  - **Note:** if Citavi is not available from the drop down list you might not be in the user group. Contact Editing and Publishing for assistance
- Click the **OK** button at the bottom of the **Connection Properties** dialogue box and then click **OK** at the bottom of the **Configure DBServer** window
- If you are opening Citavi for the first time you will need to find the project **GSWA Shared**
  - At the bottom of the Welcome screen, select **Open Project** and in the window that opens, select the project listed there

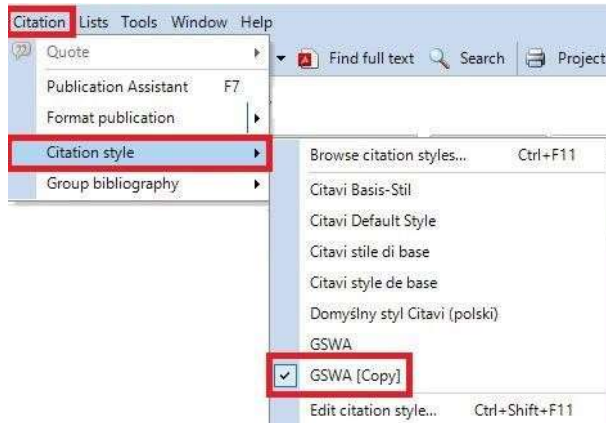


- If you've used Citavi before, the GSWA Shared project will be in the list of recently opened projects



**Note:** **GSWA Shared** is the only project to be used. Do NOT try to create local projects

- Set the GSWA reference style by clicking the **Citation** button in the toolbar. In the drop down menu that opens, select Citation style → GSWA [Copy]



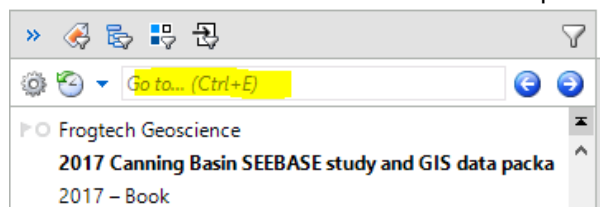
## Searching for references

Citavi 6 offers two search modes for references: Quick search and Advanced search

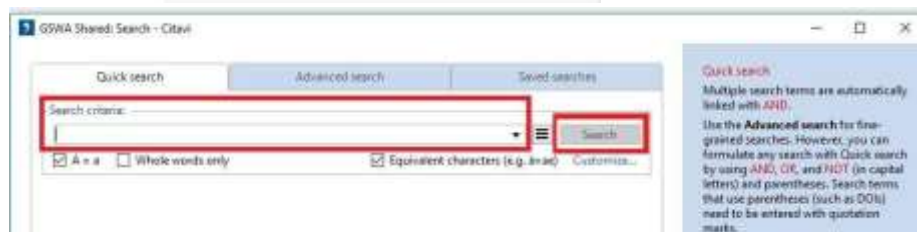
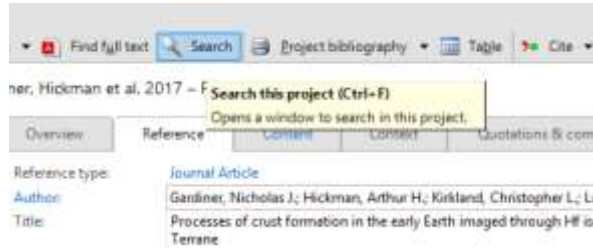
### Quick search

**Quick search** produces a comprehensive list from all entries in the **GSWA Shared** project that contain the search term

- In the Citavi 6 Workspace, click on the **References** tab to view the reference editing pane and do either of the following:
  - enter the search term in the text box at the top of the reference list

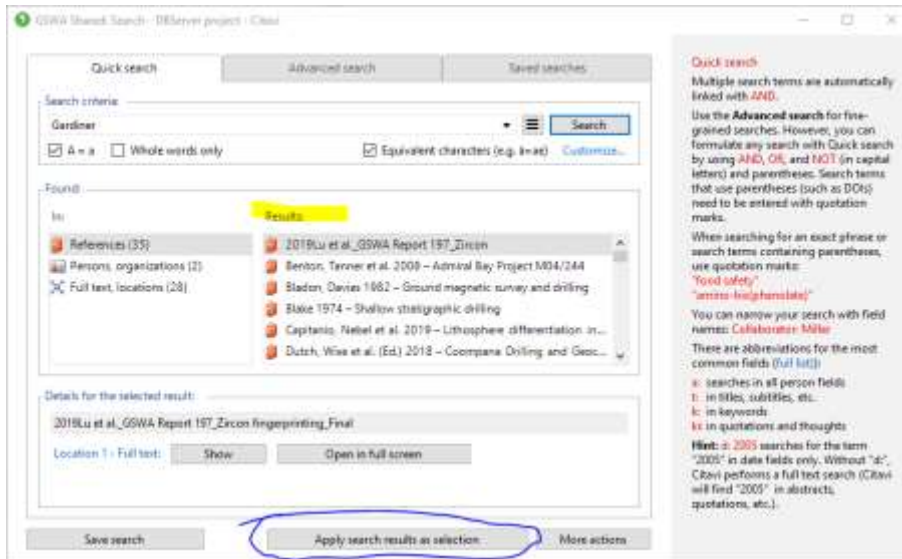


- from the toolbar, click on the Search button (or use Ctrl + F) to open a separate search window




- In the dialogue box that opens, click on the **Quick search** tab and enter a term in the **Search criteria** field and click **Search**

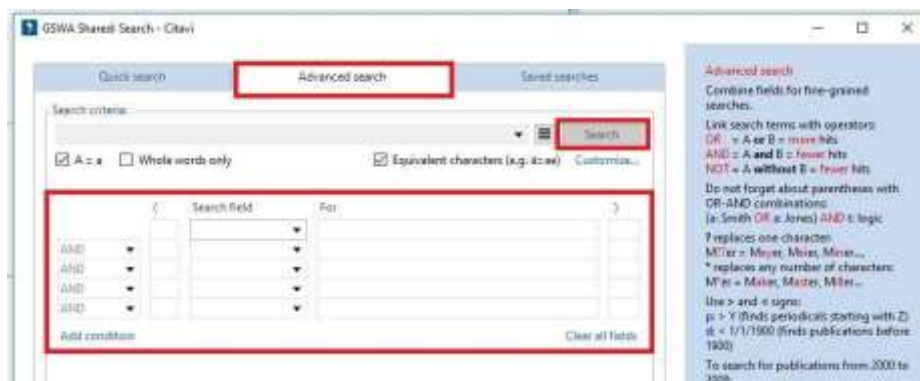
- Scroll through the results list and double click on the required reference OR use **Apply search results as selection** to show only these references in the reference list on the left of the main screen (the project contents are now filtered for the selected criterion)



## Advanced search

**Advanced search** helps to find information quickly by creating specific, targeted searches.

- In the **Reference Editor**, in the toolbar click the **Search**  button (or press Ctrl + F) and In the dialogue box that opens up, click the **Advanced search** tab
- Select the **Search** field you want to search by using the drop down menu and type in the search text for that field
- When using multiple search conditions, select whether to combine them with **AND**, **OR**, or **NOT** operators and parentheses
- Click **Search** or press **Enter** to perform the search

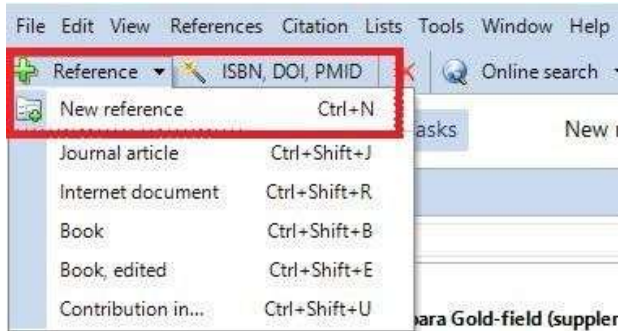


**Note:** If you choose to save the search, this will be visible to, and can be used, modified and deleted, by all users

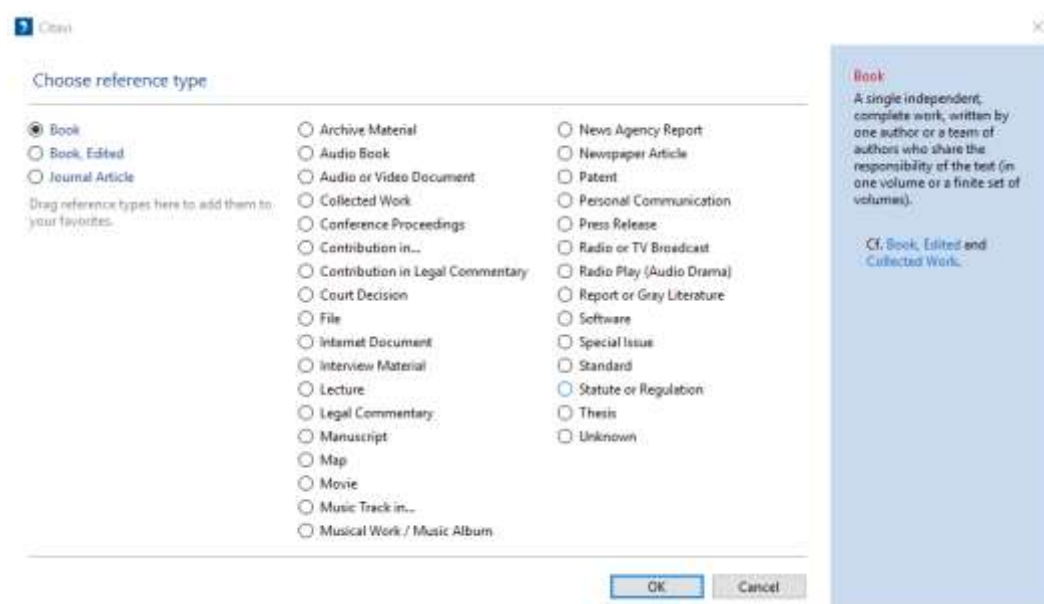
## Adding references into Citavi 6

### Manually from toolbar

- From the toolbar click on **Reference** and, in the drop down list, select **New reference** (or press Ctrl + N)



- In the **Choose reference type** box that opens, select the appropriate reference type by clicking on the appropriate radio button then click **OK** or press **Enter**



- The names of Citavi 6 reference types differ from reference types defined or recognized by GSWA. For example, Citavi does not have types such as Geochronology Record, WAMEX Report or Data layer.

Eleven Citavi reference types have been used to represent the range of publications most commonly cited in geoscience publications (and of these the type Contribution in... is used three times, giving a total of thirteen — this is explained in more detail elsewhere)

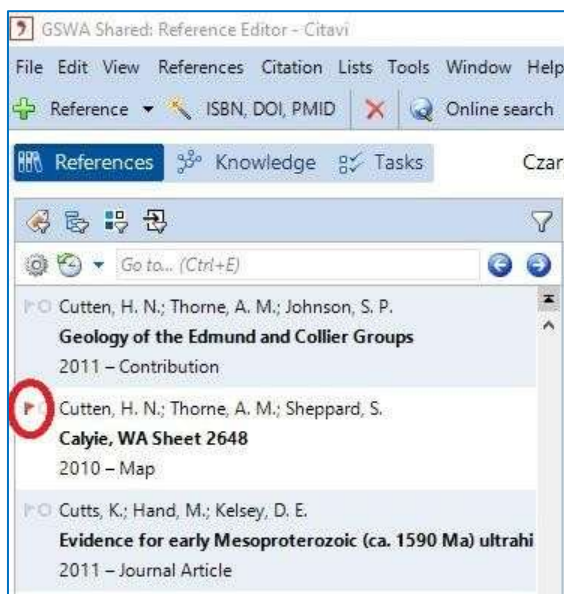
GSWA reference types relate to Citavi reference types as follows:

*Citavi quick guide*

Citavi	Description	GSWA examples	Notes
Book	Whole book with author(s) and publisher	Text book; GSWA non-series book	Fields have been provided to cope with all these under the same Citavi reference type but some fields are reserved for specific references. Please ask if unclear
	Serial (Book, Monograph)	Report; Record; Bulletin; USGS thematic series	
	Compiled product	GSWA Record, field guide	
Book, Edited	Book with editors rather than authors		Use as the parent volume to add chapters or sections of a book
Conference Proceedings	Volume of abstracts presented at conference or symposium	Abstract or article in a conference volume	In most cases, enter the containing volume as Conference Proceedings with editor(s), then add the abstract or article as Contribution in...
Contribution in...	Chapter or section in Book, Edited Abstract in Conference Proceedings	Article in Open Day abstracts; chapter in edited book	First enter the containing volume as Book, Edited or Conference Proceedings or Report or Gray Literature, then add the chapter, article, abstract or appendix as Contribution in...
	Appendix in report; in particular, where the appendix and report authors are different	Appendix in WAMEX or WAPIMS report	
Internet Document	Data or other content delivered online	WACHEM; geophys data (also GA online data); ENS report; data layers in GeoVIEW.WA; datasets downloaded from Data & Software Centre	
	Web Reference	Web page; GSWA or GA metadata page; PDF accessed via web browser (with URL)	
Journal Article	Article or paper in periodical Magazine/Newspaper article		
Report or Gray Literature	WAMEX/WAPIMS Report Geochronology Record Stock Exchange Report Unpublished Report Miscellaneous		Fields have been provided to cope with all these under the same Citavi reference type but some fields are reserved for specific references. Please ask if unclear
Software	GSWA Digital Product		
Map	Map	Series map or plate	
Thesis	Thesis or dissertation from tertiary institute		
Unknown	Generic reference type used to define style template		If the reference type is uncertain, use Report or Gray Literature

- In the Reference tab, fill in at least those fields needed to satisfy GSWA style (see [Guide to referencing](#) for the minimum information required in each reference type).

As the newly added references in Citavi 6 go straight into the GSWA Shared project, it is imperative to mark them as new additions so that E&P staff can find and validate them. To mark a newly added reference, click on the red flag



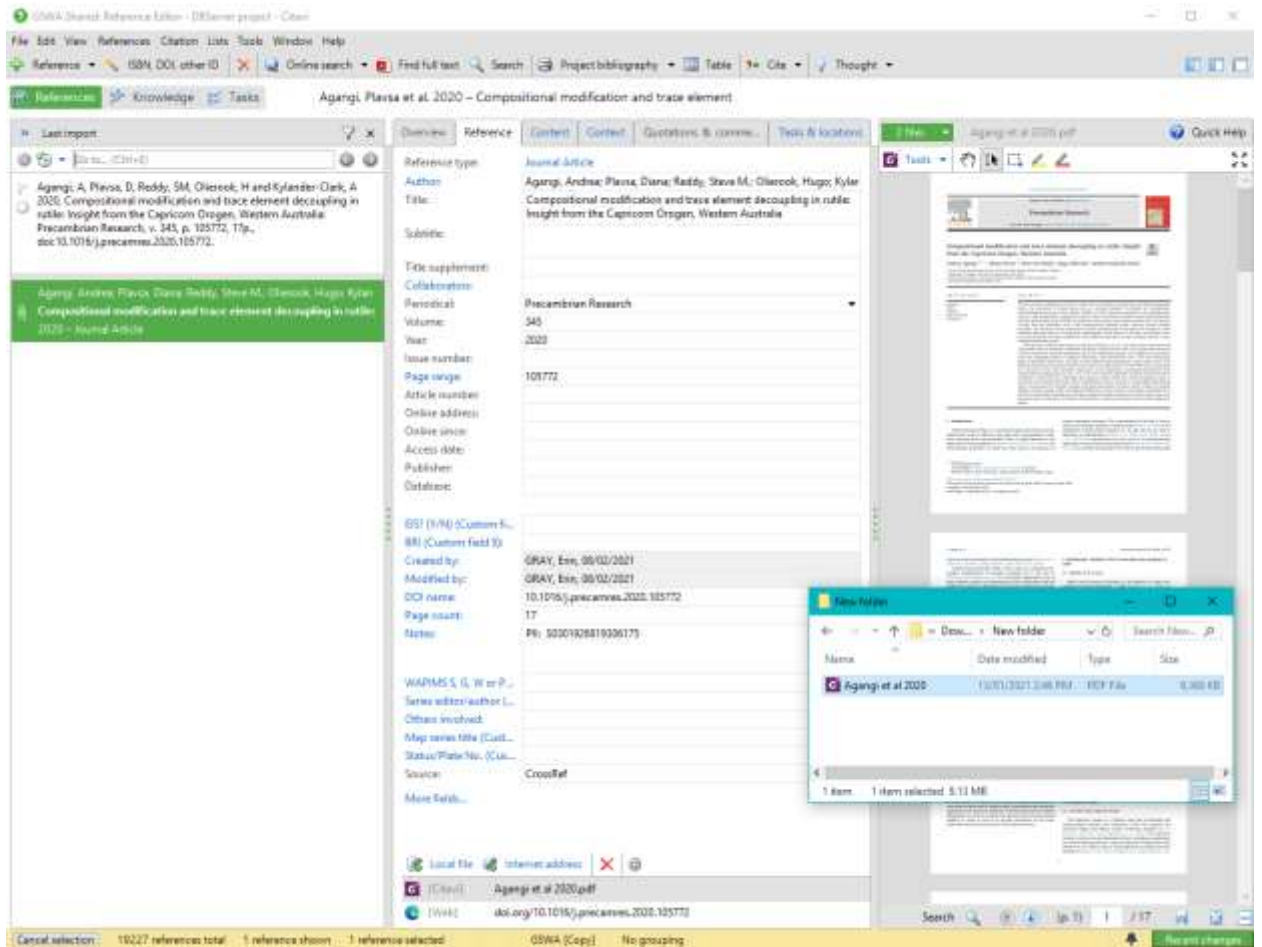
## PDF import

Most recent PDFs carry the attribute information of the publication saved as metadata. This means that when you import the PDF into Citavi 6, the relevant reference fields are autofilled. PDFs can be imported in two ways: drag and drop and via the Import option under the File menu.

## Drag and drop

- Check the database to ensure that the entry doesn't already exist, as duplicate entries are **not** detected during this process
- From an open folder window, drag the PDF file into the Citavi 6 workspace (specifically onto the Reference tab or reference list)



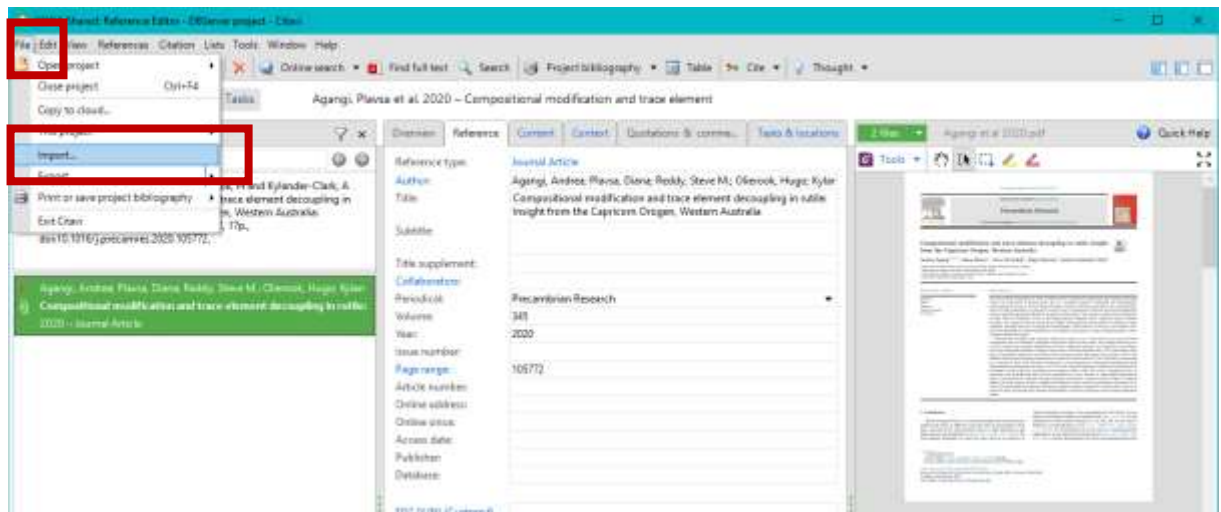


- Citavi 6 will assign the publication to a reference type and autofill the relevant fields. A copy of the publication will also be added to the Citavi attachments folder so all users can access the publication\*. Check the information has been assigned to the correct fields and that the reference looks correct
- Mark the entry as a newly added reference for checking by E&P

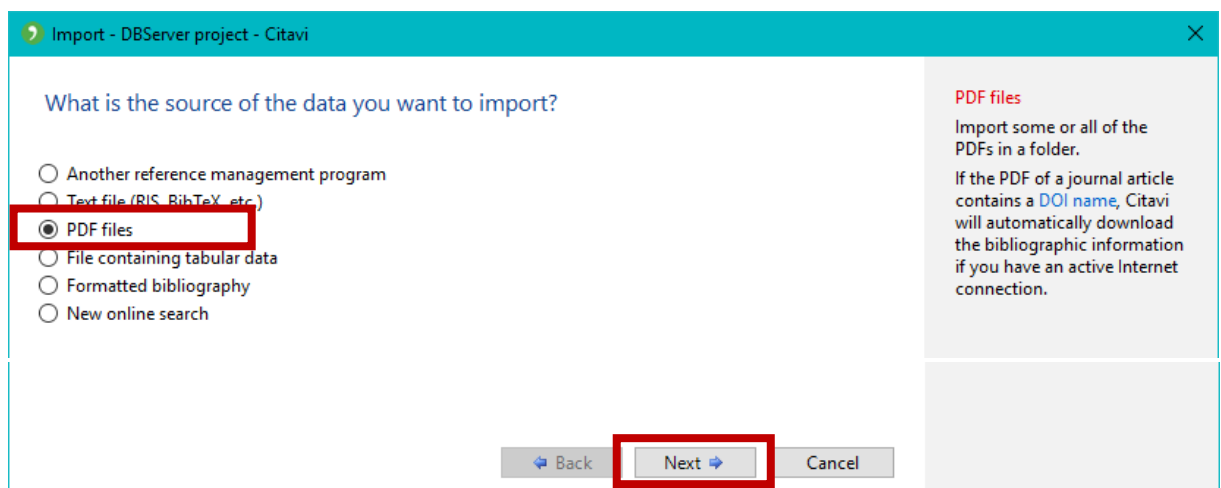
\* Please be mindful of this when adding entries for **confidential** reports or other documents

## Import

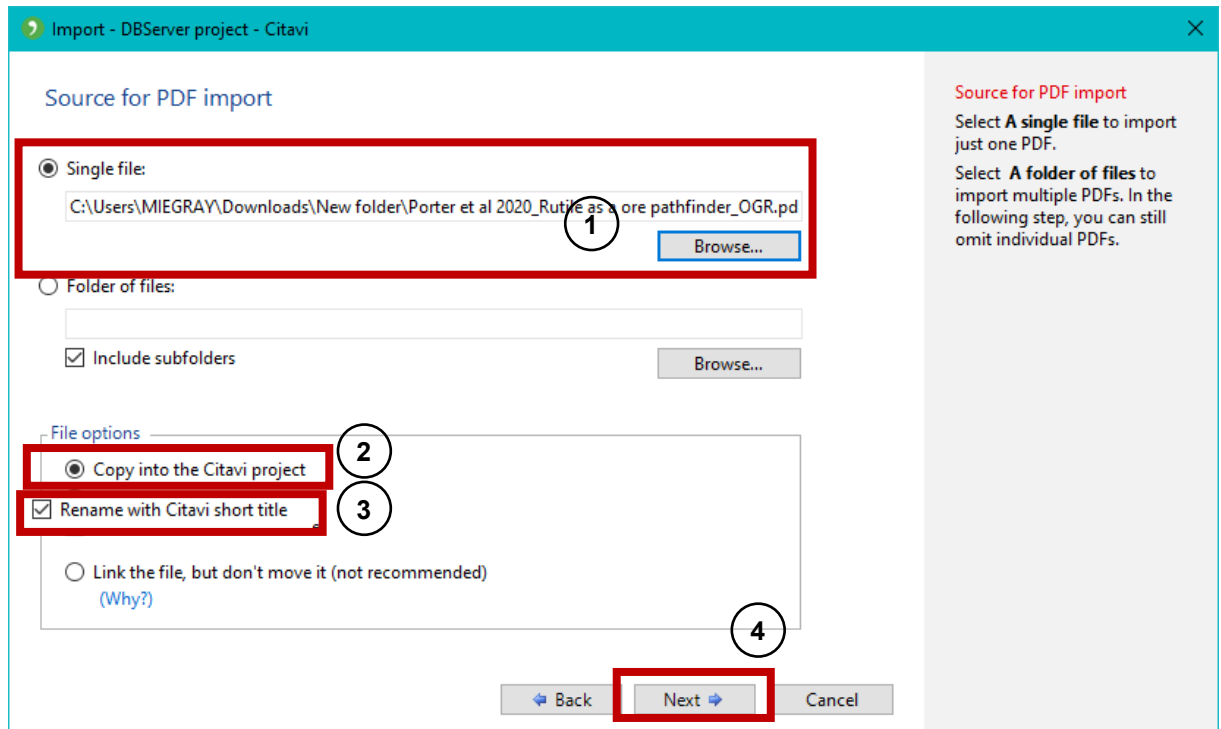
- Go to the **File** menu and click on **Import...**



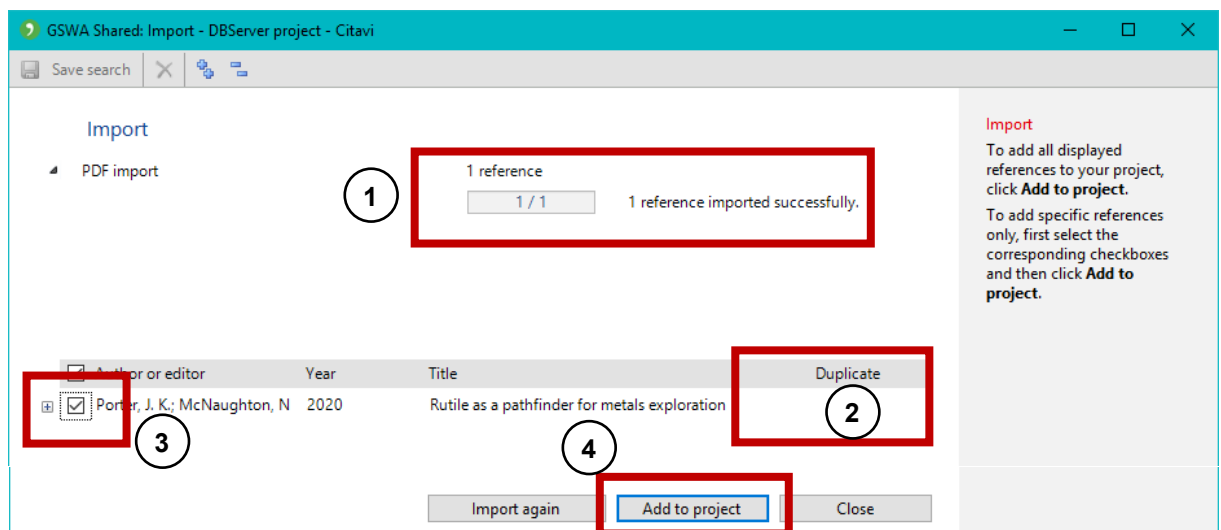
- Select **PDF files** and click **Next**



- Select from **Single file** or **Folder of files** and navigate using the **Browse...** button to find the PDF
- Under **File options**, select either **Copy into the Citavi project**, which will create a copy of your PDF, or **Move into the Citavi project**, which will remove the PDF from the folder it is currently in and move it into the Citavi database. Please do not use **Link the file**, but do not move it as any changes to the location or folder structure will break the link
- Ensure **Rename with Citavi short title** is ticked
- Click **Next**



- A new window will pop up indicating whether the import has been successful or not, and whether it is a duplicate of a reference already in the database. If there is **no** duplicate, tick the box next to the reference and click **Add to project**
- If there is a duplicate, **do not import the reference** and instead use the existing entry




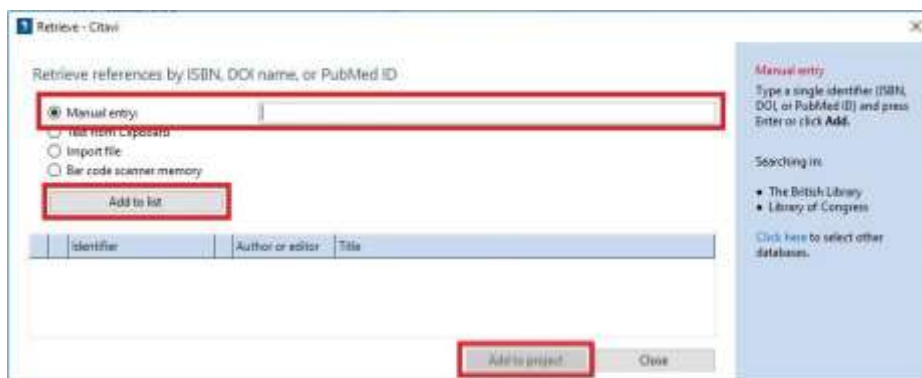
- Citavi 6 will assign the publication to a reference type and autofill the relevant fields. A copy of the publication will also be added to the Citavi attachments folder so all users can access the publication\*. Check the information has been assigned to the correct fields and that the reference looks correct
- Mark the entry as a newly added reference for checking by E&P

\* Please be mindful of this when adding entries for **confidential** reports or other documents

## Online searching for references

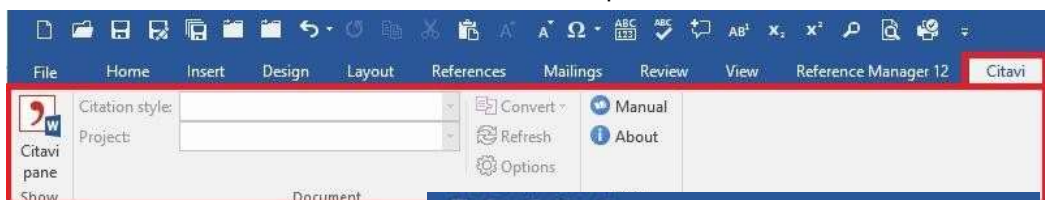
Citavi 6 also allows to **add** bibliographic information by means of **alphanumeric identifiers**, such as ISBN, DOI and PMID.

- In the toolbar of the Reference Editor click on the **ISBN, DOI, PMID** button  to open the Retrieve references by ISBN, DOI name, or PubMed ID dialog box
- Enter the ISBN, DOI or PMID name in the **Manual entry** field (e.g. 10.1016/j.nedt.2008.07.004)
- Click the **Add to list** button. Based on the identifier, Citavi 6 then retrieves the bibliographic information from an online source
- Finally, click the **Add to project** button

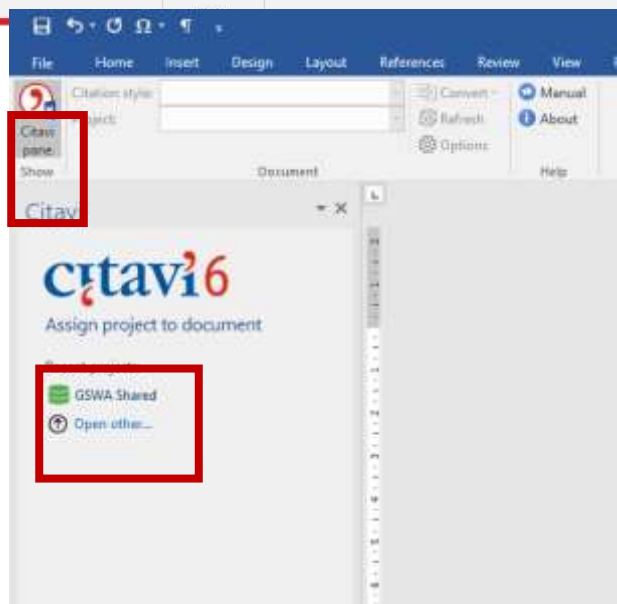


## Opening Citavi 6 in MS Word

- In the MS Word toolbar, click on the **Citavi** tab to open the **Citavi 6 ribbon**



- Click on Citavi pane, then **Open projects: GSWA Shared**

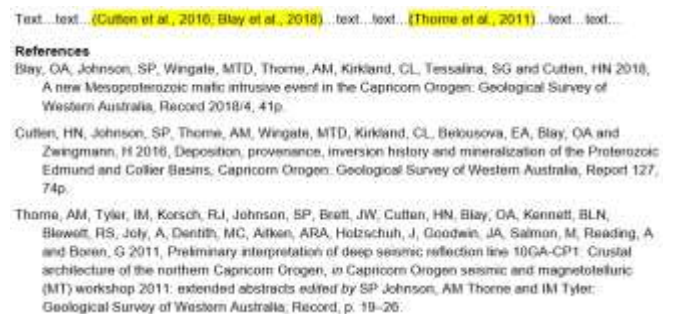
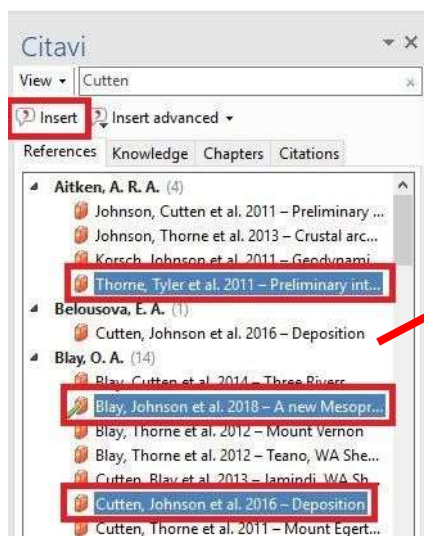
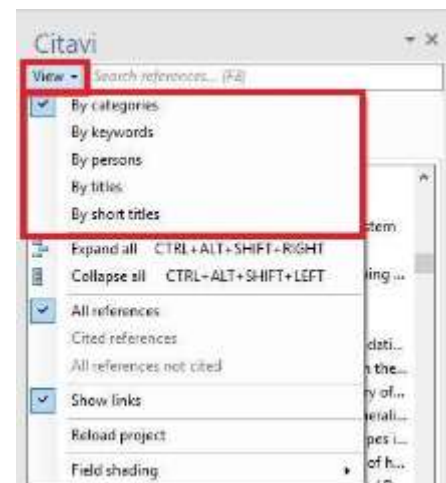


- Set the GSWA citation style by clicking the **Citation style** drop down menu and choosing **GSWA [Copy]**

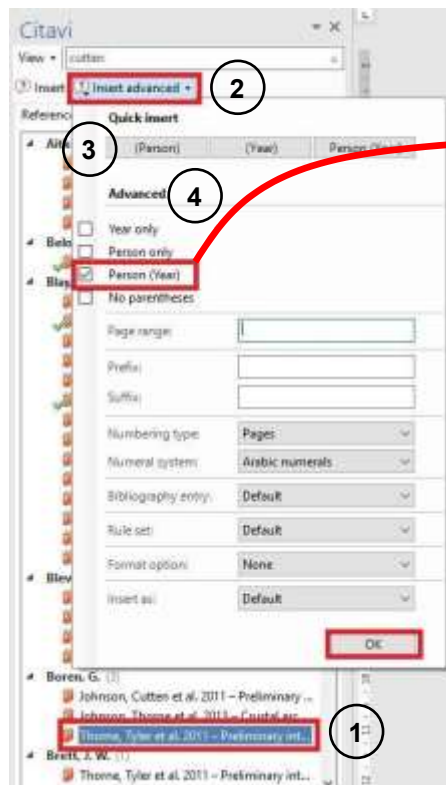


## Searching for and inserting references into MS Word

- In the Citavi pane click on the View menu arrow and select the appropriate search category
- Based on chosen search category, type the search term into the text field adjacent to **View**, which is populated with the tip *Search references... (F8)*. This action immediately creates a results list under the **References** tab
- To insert references into the Word document in an (Author, Year) in-text citation style: 1) place the cursor where you want the citations inserted; 2) in the results list, select single or multiple references; 3) click the 'Insert' button (or double click a single reference or drag several selected references into a suitable location in the text)



- To insert references in an Author (Year) in-text citation style: 1) in the results list, select the chosen reference; 2) select **Insert advanced** at the top of the pane.
- Then use either: 3) **Quick insert** to choose Person (Year) or 4) the options under **Advanced** to select the format of the citation and any other details such as prefix or suffix to include within the citation parentheses
- Click **OK**



Text...text... (Cutten et al., 2018; Blay et al., 2018) ...text...text... Thorne et al. (2011) ...text...text...

**References**

Blay, OA, Johnson, SP, Wingate, MTD, Thorne, AM, Kirkland, CL, Tassallina, SG and Cutten, HN 2018, A new Mesoproterozoic mafic intrusive event in the Capricorn Orogen, Geological Survey of Western Australia, Record 2018/4, 41p.

Cutten, HN, Johnson, SP, Thorne, AM, Wingate, MTD, Kirkland, CL, Belousova, EA, Blay, OA and Zwingmann, H 2018, Deposition, provenance, inversion history and mineralization of the Proterozoic Edmund and Collier Basins, Capricorn Orogen, Geological Survey of Western Australia, Report 127, 74p.

Thorne, AM, Tyler, IM, Korsch, RJ, Johnson, SP, Brett, JW, Cutten, HN, Blay, OA, Kanneft, BLN, Blawett, RS, Joly, A, Dentith, MC, Atkin, ARA, Holzschuh, J, Goodwin, JA, Salmon, M, Reading, A and Boren, G 2011, Preliminary interpretation of deep seismic reflection line 10GA-CP1: Crustal architecture of the northern Capricorn Orogen, in Capricorn Orogen seismic and magnetotelluric (MT) workshop 2011: extended abstracts edited by SP Johnson, SP Johnson, AM Thorne, AM Thorne, IM Tyler and IM Tyler: Geological Survey of Western Australia, Record, p. 19–26.

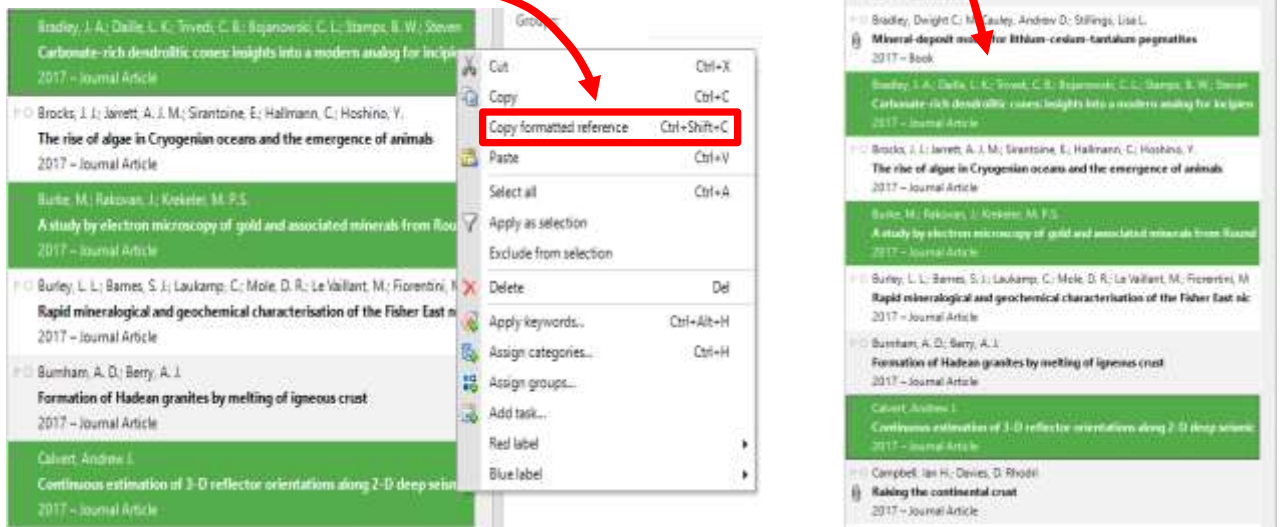
## Creating a 'stand-alone' reference list in MS Word

To **export/copy** references from Citavi as a **'stand-alone' Reference list**, i.e. a bibliographic reference list which:

- Does **not** appear at the end of a Word document, listing the references that appear as 'in-text citations' within the body of the document, and
- Is **not** linked to the Citavi database via 'field codes' (for more information on 'field codes', see Chapter 13)

Use the **'Reference search – Text from clipboard'** option as follows:

- In the **'Reference tab'** mark the references to be exported/copied to the 'stand-alone' Reference list by holding down the **'Ctrl'** key and selecting them with a **single left-click** of the mouse. The **selected references** then appear **highlighted in green**.
- While **hovering the mouse** over **any of the selected references** highlighted in green, **right-click the mouse** and the **dialog box** that appears select **'Copy formatted reference'**.



- Switch to an open **document in MS Word** (or any other application capable of **text processing**, e.g. **MS Outlook**) and **press the 'Ctrl' + 'v'** keys to insert the selected references. The **selected references** then appear in the **Word document** (or any other chosen application) in the **GSWA [Copy]** citation style **without** being linked to Citavi.

Bradley, JA, Daille, LK, Trivedi, CB, Bojanowski, CL, Stamps, BW, Stevenson, BS, Nunn, HS, Johnson, HA, Loyd, SJ, Berelson, WM, Corsetti, FA and Spear, JR 2017, Carbonate-rich dendrolitic cones: insights into a modern analog for incipient microbialite formation, Little Hot Creek, Long Valley Caldera, California: npj Biofilms and Microbiomes, v. 3, no. 1, p. 32, doi:10.1038/s41522-017-0041-2, <https://doi.org/10.1038/s41522-017-0041-2>.

Burke, M, Rakovan, J and Krekeler, MP 2017, A study by electron microscopy of gold and associated minerals from Round Mountain, Nevada: Ore Geology Reviews, v. 91, p. 708–717.

Calvert, AJ 2017, Continuous estimation of 3-D reflector orientations along 2-D deep seismic reflection profiles: Tectonophysics, v. 718, p. 61–71, doi:10.1016/j.tecto.2016.11.002.

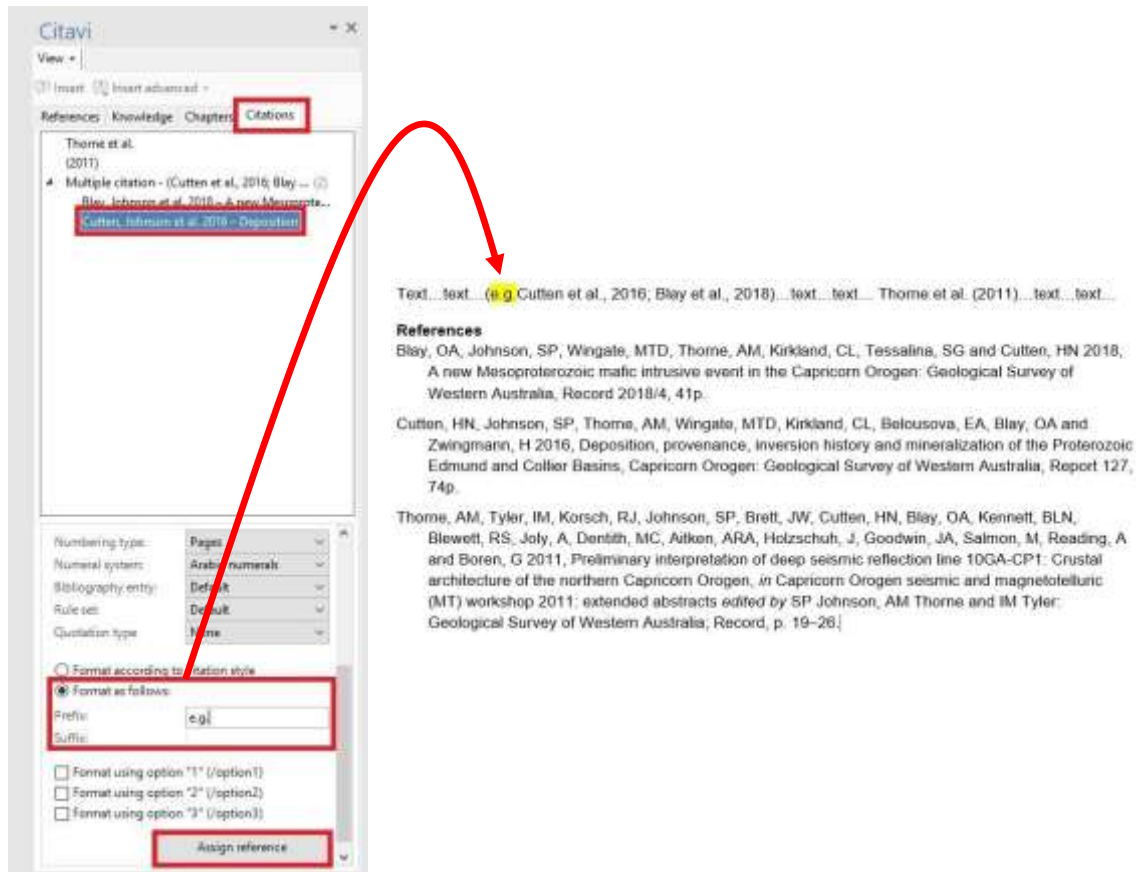
## Modifying citations after inserting in MS Word

It's important to appreciate that citations and the reference list added to Word from Citavi are **not** normal text. It's best to treat these as objects and make any modifications using the tools provided in the Citavi add-in

Do this by selecting the **Citations tab** in the Citavi pane to list the references cited in the Word document. Double clicking on a citation in the **Citations tab** will take you to the location of that entry in the text

To add extra content inside the citation parentheses, such as a prefix or suffix:

- from the list of citations (in the Citavi pane), select the citation to be modified
- at the bottom of the pane, choose the options you want or type extra text in the Prefix or Suffix fields, remembering to add a space after or before the added text, respectively



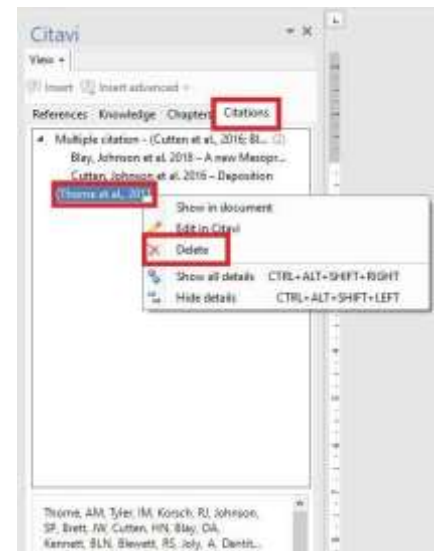
## Deleting in-text citations in MS Word

It's important to appreciate that citations and the reference list added to Word from Citavi are **not** normal text. It's best to treat these as objects and make any modifications using the tools provided in the Citavi add-in

In MS Word, references can be **removed** from **in-text citations** and the **References** list. The mode of removal differs between **'single'** (i.e. Author, Year) type and **'multiple'** (i.e. Author1, Year; Author2, Year; Author3, Year) type citations

### Deleting single in-text citations in MS Word

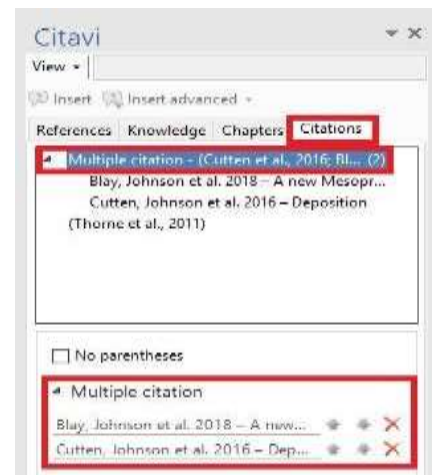
- In the **Citavi** pane click on the **Citations** tab to open up the list of in-text citations
- Right-click on the reference to be deleted
- Click on **Delete** to remove reference from the list of in-text citation and the in-text citation and References list in the MS Word document





### Deleting multiple in-text citations in MS Word

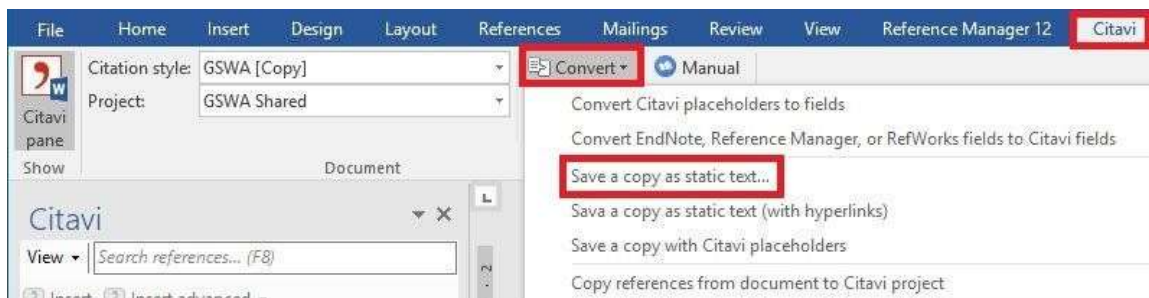
- In the **Citavi** pane click on the **Citations** tab to open up the list of in-text citations
- Right-click on the header of the grouped multiple citations, from which one or more citations are to be deleted
- In the 'Multiple citation' list at the bottom of the **Citations** pane, click on the delete symbol **X** to delete the reference(s)



### Removing field codes from MS Word documents

Before submitting a MS Word document containing in-text citations to E&P for editing, the **Citavi 6 formatting**, or 'field codes', should be **removed**

- In the MS Word toolbar click on the Citavi tab to open the Citavi 6 ribbon
- Click on the **Convert** menu button
- In the drop down menu click on **Save a copy as static text...**



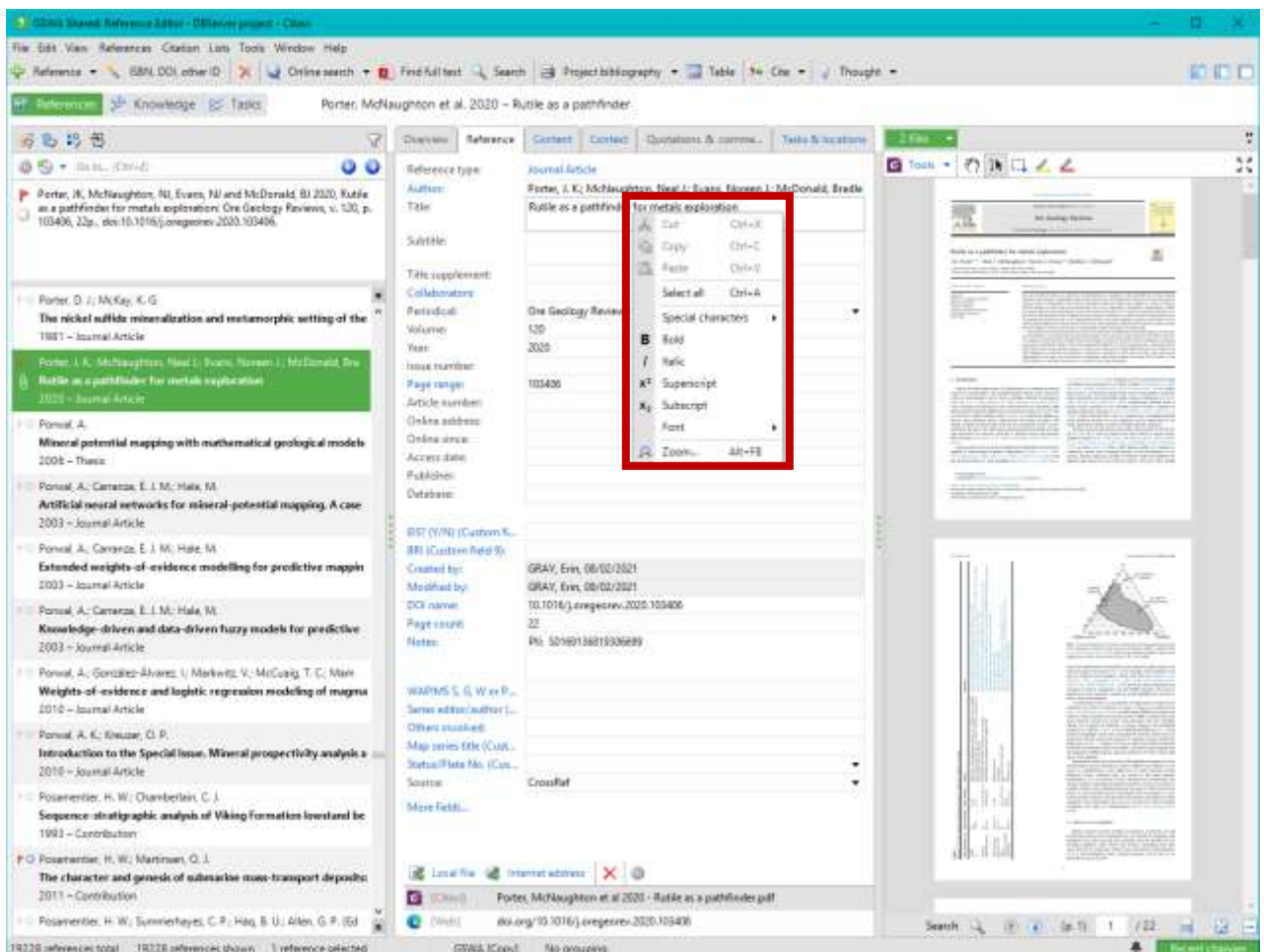
- In the 'Save As' window of **MS Word** that opens, choose a location to save the new **uncoded** document. **Note:** save the **new, uncoded** document under a **different file name**, and **retain** the **original document** which contains the Citavi 6 field codes.

## Important points to note

- The **GSWA Shared** project is the **ONLY** database to be used. Do **NOT** create any other local Project databases
- Do **NOT** delete any references from the GSWA Shared project. In case of an accidental deletion, please notify [Stephen White](#), [Bernd Striewski](#) or [Bec Hitchings](#)
- If encountering problems of any kind when working with Citavi 6, Online Help can be obtained via [www1.citavi.com/sub/manual6/en/index.html](http://www1.citavi.com/sub/manual6/en/index.html)

## Tips and tricks

- Right clicking in the Title or Subtitle field will open a drop down menu for formatting, including special characters, bold, italic, superscript, subscript and font. **Non-breaking spaces** (Ctrl + Shift + spacebar), **em dashes** (Alt + 0151) and **en dashes** (Alt + 0150) can also be added and these will carry through to the final reference list in MS Word



## Contact

For more information, contact [publications@dmirs.wa.gov.au](mailto:publications@dmirs.wa.gov.au)

Find the full [online manual for Citavi 6](#).