

## HIBS

### GUIDE FOR SWITCHING FROM CITAVI TO ZOTERO

Since HAW Hamburg will no longer support the reference management program Citavi **from the end of 2024**, we recommend switching from Citavi to Zotero. This guide describes step-by-step how to transfer your reference management from Citavi to Zotero.

### INSTALLING ZOTERO

Download Zotero and install it on your computer. You can find the download here: <https://www.zotero.org/download/>

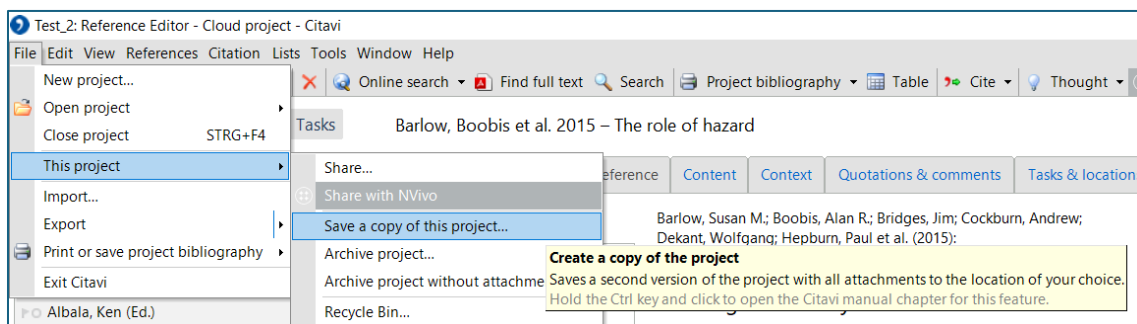
**Important:** Please note that you also need to install the connector that matches your browser.

### BACKING UP YOUR CITAVI PROJECTS

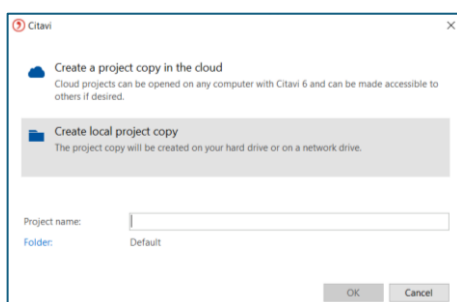
Citavi projects are divided into cloud projects and local projects. The instructions for cloud projects can be found under the section "[Cloud Projects](#)," and for local projects under "[Local Projects](#)".

#### Cloud-Projects

To back up your cloud projects, you must first convert them into local projects. To do this, open your cloud project in Citavi, select **File > This Project > Save a copy of this project**.



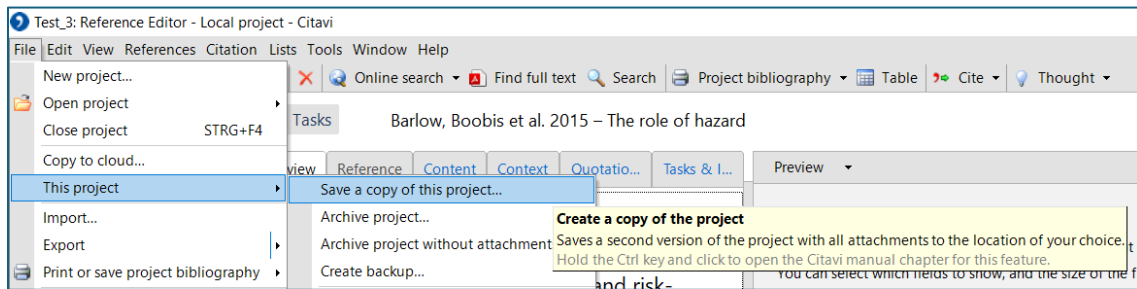
Select a storage location and a name for the local copy under **Create local project copy**.



Decide whether you want to delete the cloud project. The local project will be created and opened once the download is complete.

## Local Projects

Open your local project in Citavi, select **File > This Project > Create Backup**, and create a backup of your local Citavi project file.



You can find the backup file under **Tools > Options > Folders**. The default location is **C:\<Your Username>\Documents\Citavi 6\Backup**. You can click on **Open Folder in Windows Explorer** under **Backups** to access the file. It is saved with the file extension ctv6bak (or ctv5bak).

**Important:** For large projects, generating the copy may take longer. Ensure that all background processes in Citavi are completed before proceeding.

## UNPACKING THE BACKUP

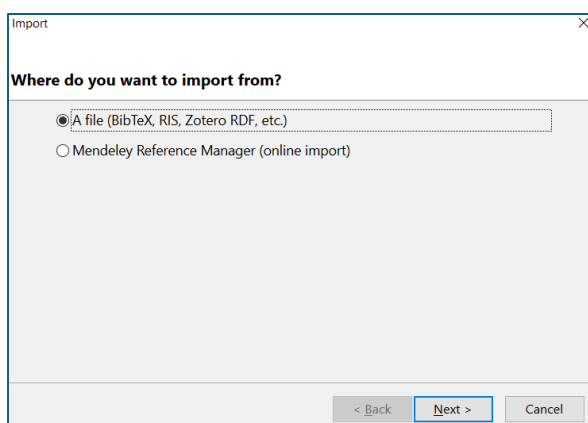
The ctv6bak file is a zip file that needs to be unpacked. If this is not possible for you, unpack the file using a program like "PeaZip." You can download it here: <https://peazip.github.io/>

## TRANSFERRING ATTACHED DOCUMENTS

Move all attached documents (e.g., PDFs) to the folder with the unpacked ctv6bak file so that they can also be imported into Zotero. By default, these documents are located in **C:\<Your Username>\Documents\Citavi6\Projects\<Project Name>\CitaviAttachments**.

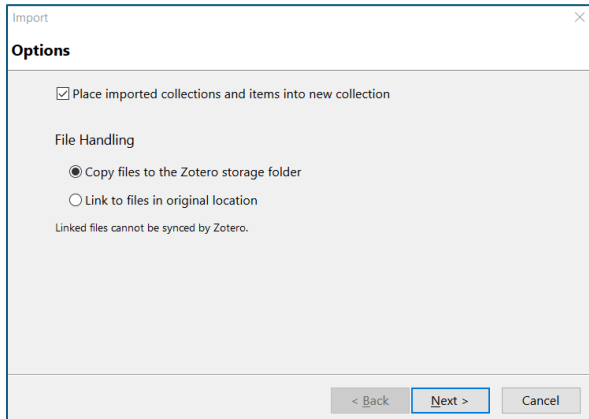
## IMPORTING INTO ZOTERO

Start Zotero and select **File > Import**. Choose the option **A File (BibTeX, RIS, Zotero RDF, etc.)**. Then click **Next**.



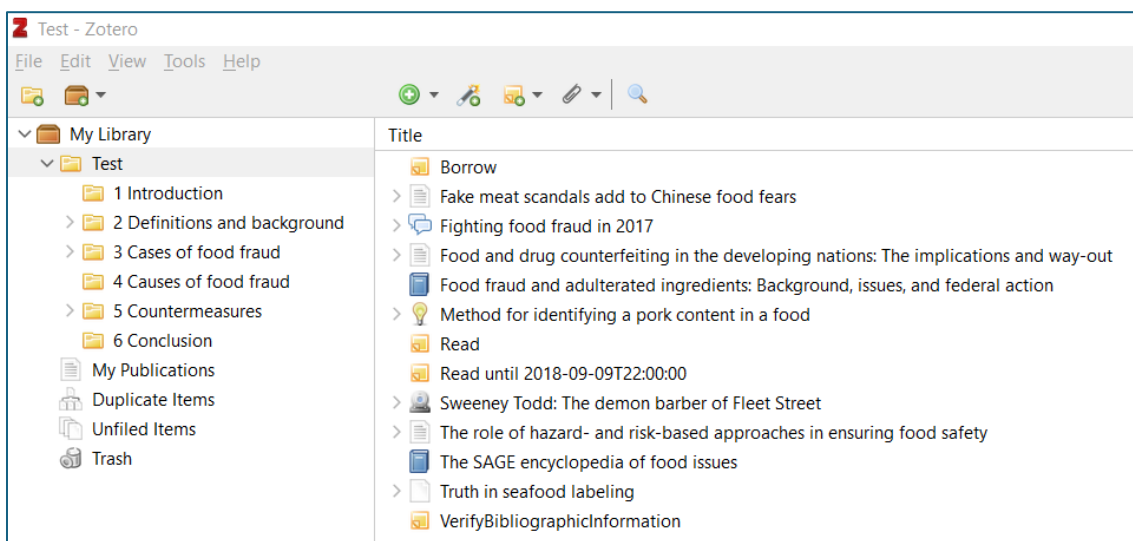
Select the unpacked file (ctv6). Enable the option ***Place imported collections and items into new collection*** and choose ***Copy files to the Zotero storage folder***.

If you want to create a separate collection in Zotero for each Citavi project, enable the option ***Place imported collections and items into new collection***. Otherwise, all projects will be combined into one Zotero collection.



Click ***Next*** again to complete the import. You will receive a notification when the import is successful.

Zotero will create a new collection with sub-collections for your imported project. The name of the ctv6bak file will be used for the collection.



**Please note:** A ZOTERO LIBRARY CAN CONTAIN MULTIPLE CITAVI PROJECTS!

## IMPORTANT INFORMATION AFTER THE IMPORT

After the import, most data (literature, knowledge items, keywords, attachments, categories) will be transferred.

However, the following information will be lost when switching to Zotero:

- Star ratings
- Images in notes
- Keywords and categories for quotes and comments
- Knowledge items of the type "Thought"
- References between literature sources
- Links between source and quote in knowledge items

After the import, it may be necessary to manually assign tasks, link edited volumes with contributions, insert image quotes, create links between source and quote in notes, and link knowledge items with contributions.

### Tutorial of the University Library Tübingen:



<https://www.youtube.com/watch?v=O-2Bf5NNtaU>