

# Instructions | Moving from Citavi to Zotero

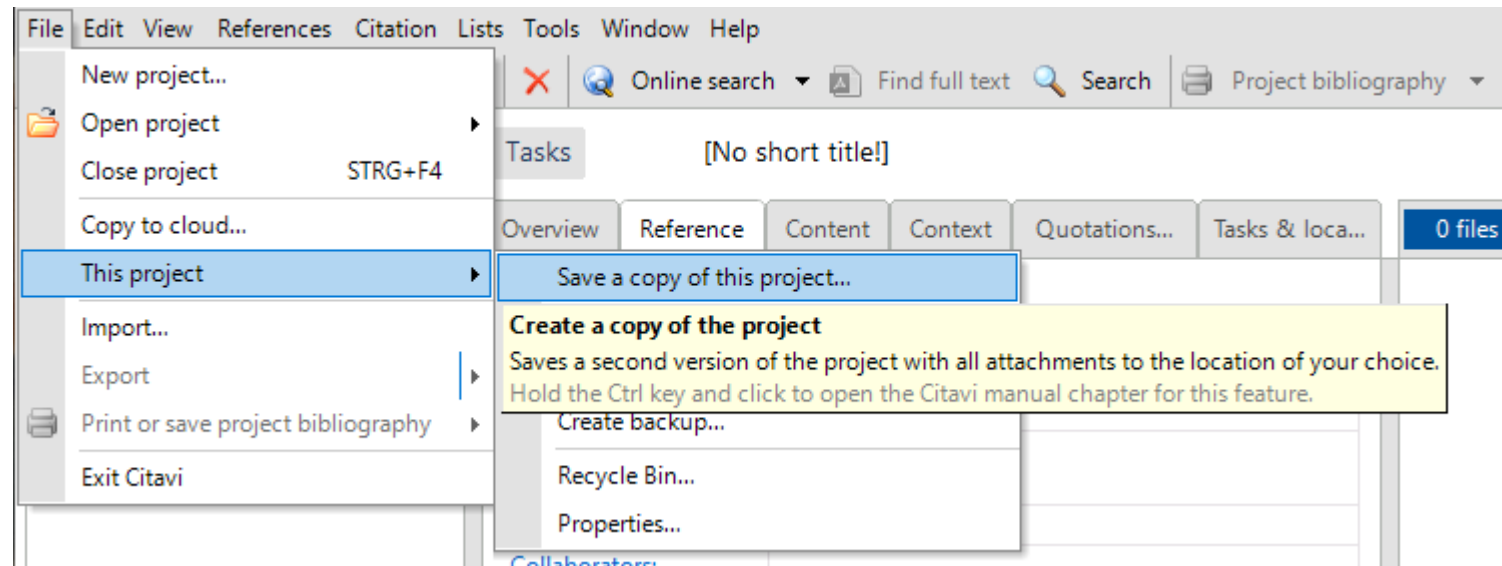


This guide will explain how you can transfer your Citavi projects to Zotero.

# Cloud projects

# Necessary steps ...for cloud projects

- If you have worked with cloud projects in Citavi, you must first convert them into local projects.
- Creating a local copy: File → This project → Save a copy of this project...



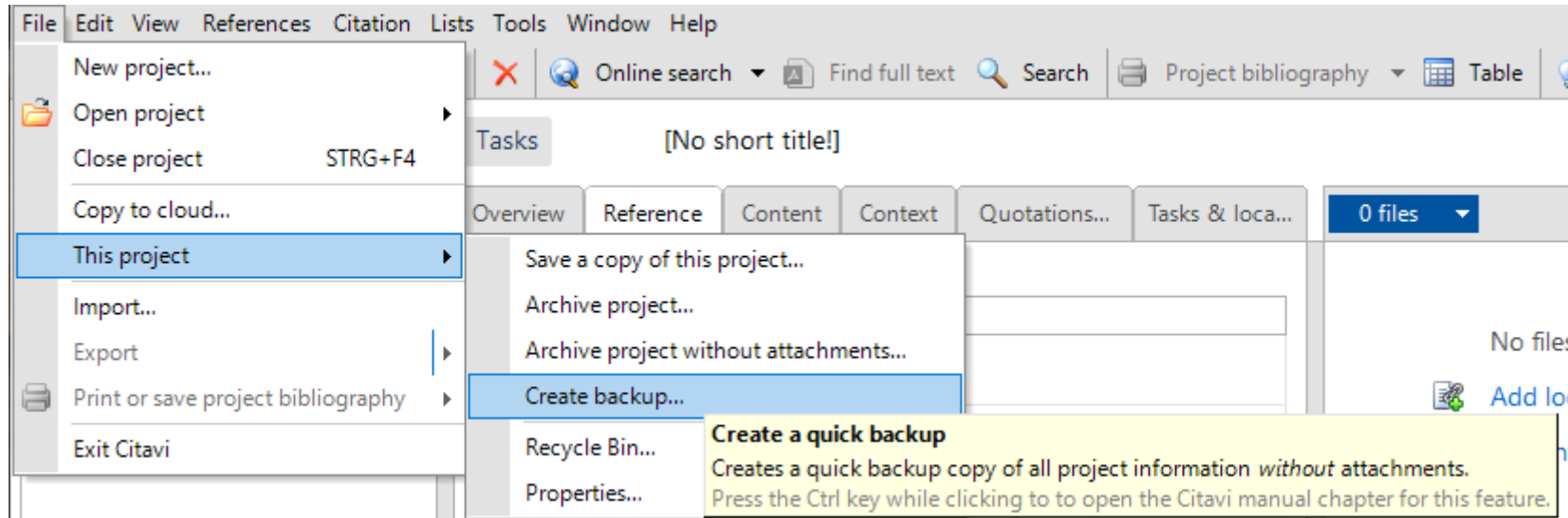
# Necessary steps ...for cloud projects

- Choose ‚Create local project copy‘ → Choose a project name → Next
- Choose ‚Keep local project‘
- A local project copy is then automatically created and the project is opened.
  
- Now continue with the steps listed below (‘... for local projects’)

# Local Projects

# Necessary steps ...for local projects

- In Citavi click on File → This project → 'Create backup'



## Notes on storage location

- The backup is then stored as a .ctv5bak or .ctv6bak file under C:\Users\\Documents\Citavi 6\Backup. (If there is another 'Citavi 6' folder in the 'Citavi 6' folder, then call up this folder again and go to the 'Backup' folder here.)
- You can also search for the location of the projects in Citavi. To do this, click on Tools → Options → Folders at the top of the open project and then click on 'Open folder in Windows Explorer' under Backup copies.



# Preparation for export from Citavi

- The .ctv5bak or .ctv6bak file is a zip file that is first created using a program such as for example [7-Zip](#) needs to be unpacked: **Right click on the file → 7-Zip → Unzip files...**
- Confirm storage location (or select a different location), confirm name (or assign a different one), then confirm with OK.
- Once unpacked, the files should be in .ctv5 or .ctv6 format.

# Preparation for export from Citavi

- In order to transfer attached files in Citavi, they must be in the same folder as the .ctv5bak or .ctv6bak file. The attachments are located under C:\Users\\Documents\Citavi6\Projects\\CitaviAttachments. (Here, too, there can be two Citavi 6 folders.)
- Copy the files from this folder to the same location as the unzipped file.

# Import into Zotero

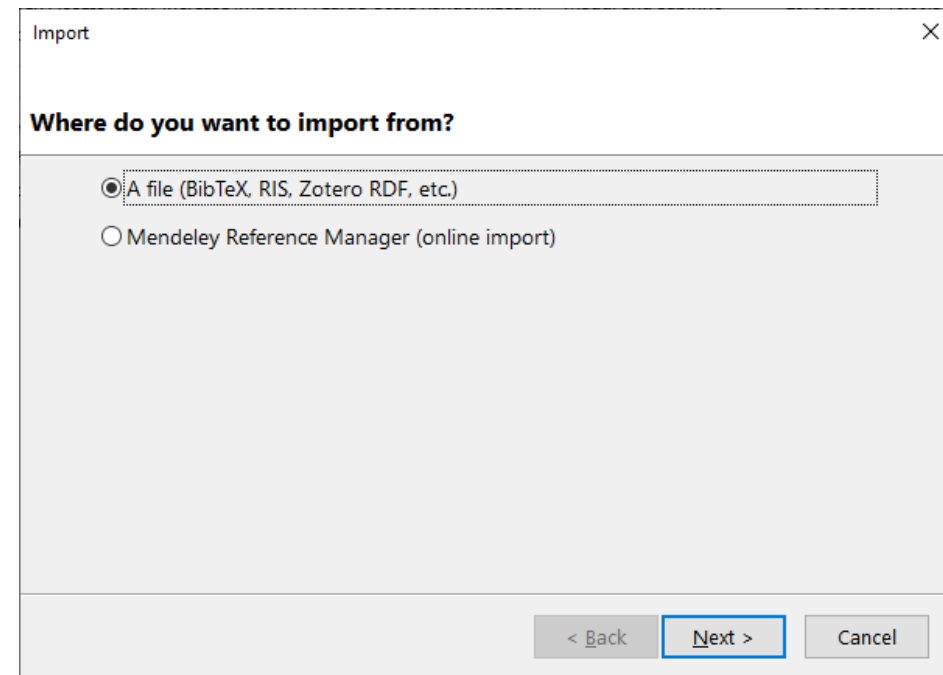
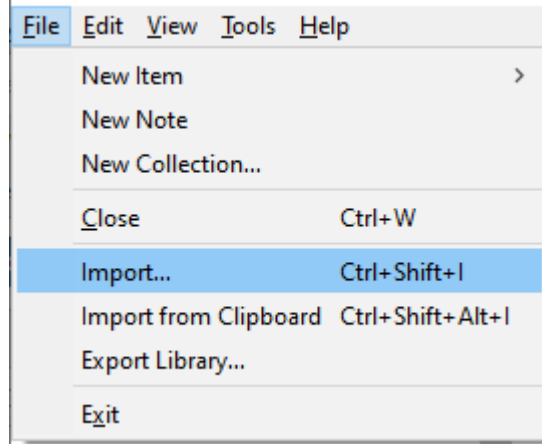
# Download and install Zotero



- Download under <https://www.zotero.org/download/>

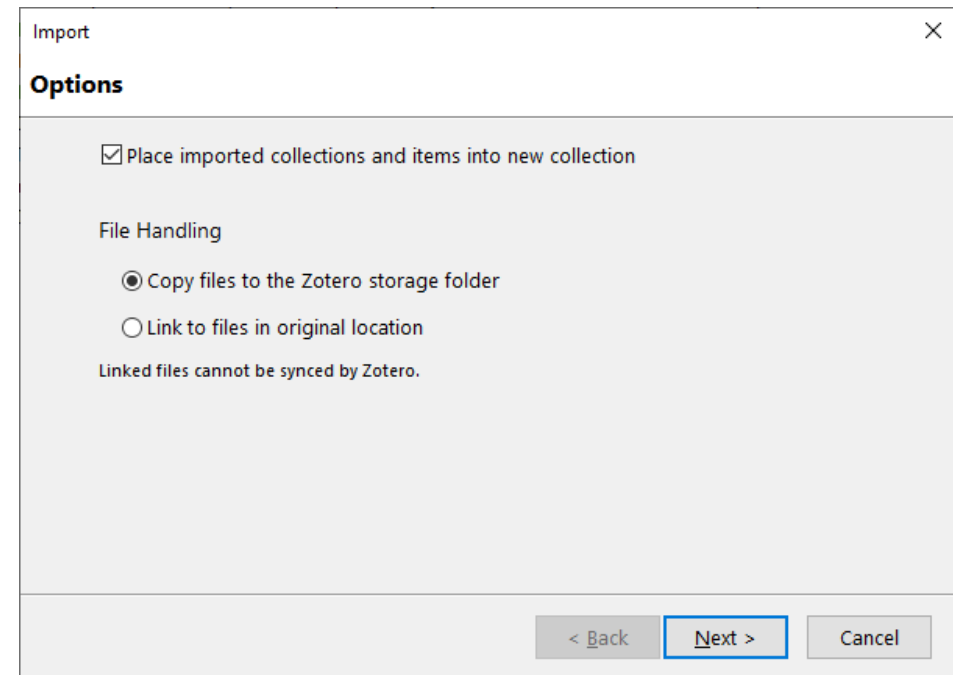
# Import into Zotero

- Import the .ctv5 or .ctv6 file into Zotero: Select File → Import...
- Then select 'A file...'



# Import into Zotero

- Select the Citavi backup file you want to import.
- Then select the options 'Place imported collections and items into new collection' and 'Copy files to the Zotero storage folder'



# Import into Zotero

- After a successful import, you will now see a new subcollection in Zotero that is named the same as you previously named the .ctv.5 or .ctv6 file.

# Differences between Citavi and Zotero



# Citavi vs. Zotero

- Not all data is adopted by Zotero when transferring a Citavi project: For example, categories are adopted as a folder structure for the references but not for the citations.
- Metadata, quotes and attachments, as well as PDF annotations are included. However, citation links are not transferred.
- Tasks are also taken over, but without a link and therefore have to be assigned to the entries manually afterwards.

# Citavi vs. Zotero: Quotes, notes, etc.



- Knowledge items appear as a note at the corresponding reference. However, it is no longer clear what type of element it is (direct quote, indirect quote, summary, etc.). They can be inserted into Word as notes, but do not contain the source.

# Citavi vs. Zotero: Quotes, notes, etc.

- To link the knowledge elements to the entry, open the PDF in Zotero, select the Notes tab at the top right and then either
  - 'Add item note' (to attach the knowledge elements from the bar on the right as individual notes to the entry using drag & drop. These can now be called up individually in Word and are linked to the entry.)
  - Or: 'Add item note from annotations' (to combine all notes into one note with one click. This note can then only be accessed as a whole in Word.)

# Citavi vs. Zotero

- Image quotes are included without the included graphic.
- References between literary sources are not retained.

# Links and further help

- Create backups of Citavi projects:  
[https://www1.citavi.com/sub/manual5/en/101\\_backing\\_up\\_your\\_projects.html](https://www1.citavi.com/sub/manual5/en/101_backing_up_your_projects.html)
- Instructions from Zotero:  
[https://www.zotero.org/support/kb/import\\_from\\_citavi](https://www.zotero.org/support/kb/import_from_citavi)
- If you have any questions or problems, you can contact us at any time:  
[literaturverwaltung.ub@uni-mannheim.de](mailto:literaturverwaltung.ub@uni-mannheim.de)