



Analyzing PDFs with Citavi 5

Introduction

Just Like on Paper	2
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Methods in Detail

Highlight Only (Yellow)	3
Highlighting with a Main Idea (Red)	4
Adding Direct Quotations (Blue)	5
Adding Indirect Quotations (Purple)	6
Adding Summaries (Green)	7
Adding Comments (Orange)	8
Adding a Comment to an Item (Orange)	9
Adding Tasks (Turquoise)	10

Special Cases

Saving Image Quotations	11
When Text in a PDF cannot be Highlighted	12
Adding Abstracts and Tables of Contents	13
Adding Keywords	14

Hints

Hints for Selecting Text	15
Creating and Correcting Links	16
Deleting Knowledge Items and Highlights	17
Using Shortcuts	18

PDF Analysis on Multiple Devices and in a Group

Understanding Layers	19
Giving Copies of Annotated PDFs to Others	20
Viewing PDFs with an External PDF Reader	21
Editing PDFs with an External PDF Reader	22
Using PDFs in Different Group Scenarios	23

Just Like on Paper

In Citavi 5 you can analyze texts as you're used to doing on paper.


1. The **yellow highlighter** lets you quickly mark important sections in a text.
2. You can use the **red highlighter** when you want to mark an important section in a text that you might want to cite later on.



These two methods are used in all disciplines. For those who need to analyze texts more closely, Citavi offers many additional options:


3. If you want to analyze a passage closely or save its exact wording or main ideas, you can save it as a **direct quotation**, **indirect quotation**, **summary**, or **comment**. Text can also be saved as an **abstract**, **table of contents**, or **keyword**. You can even assign **tasks** to a text passage.

Pick and choose from among these tools to find the best analysis methods for yourself. One important note before getting started: **highlight colors** cannot be changed. This ensures that you can share annotations with others.

Try it Out for Yourself!

Start Citavi 5 and open a PDF in the preview to try all of the features described in this guide. In the Reference Editor every reference with an attachment is designated by the paperclip icon .


- Open the PDF from the navigation pane by double-clicking the **paperclip** .
- If you don't have any PDFs in your project, use the text by Max Weber in the example project. In Citavi click **Window > Welcome screen >  Open sample project**.


Please note: Read-only PDF files cannot be edited. In Citavi read-only PDF files are designated by a **lock**  on the bottom left of the preview pane.

Highlight Only (Yellow)



The yellow highlighter lets you quickly set off important sections of a text. Yellow highlights are only visible in your PDF and are not saved as knowledge items. The yellow highlighter is ideal for quickly going through a text and picking out important sections.


Quickly Highlight in Yellow

1. Click the **yellow highlighter** .
2. The highlighter is now enabled. Select the interesting passages in your text to highlight them. The highlighter will remain enabled.

 **When to use:** This method is useful for quickly surveying a text. You can later go back and analyze important passages more closely.

Highlight (Less Quickly) in Yellow

1. Select text using the **Text selection tool** .
2. Click the **yellow highlighter** . The selected text is highlighted, but the highlighter does not stay enabled.

 **When to use:** This method is good if you're analyzing texts in detail right from the start and want to easily switch between yellow highlighting and the other annotation options.

Saving Yellow Highlights as Knowledge Items

Yellow highlights only appear in your PDF and are not also saved as knowledge items. However, you can later change a yellow highlight so that it is saved as a knowledge item, for example, if you later decide you would like to save a text passage as a direct quotation.

1. Click a yellow highlight. The highlight is selected and the annotation options are displayed in the preview:






2. Select one of the options (information on each of the options can be found in the following pages). The yellow highlight changes color and the text is saved as the corresponding knowledge item.

Highlighting with a Main Idea (red)



In Citavi 5 we've introduced the red highlighter for highlighting important text passages and quickly saving them with a keyword or main idea.


Quickly Highlight in Red

1. Click the **red highlighter** .
2. The highlighter is now enabled. Select short passages or important terms.
3. Your highlight is saved as a core statement and appears on the **Quotations, comments** tab. Ideally, you won't need to make changes to the core statement, especially if you've highlighted a term or succinct idea. Enter categories, groups, keywords, and page numbers as needed.
4. Continue highlighting.

 **When to use:** Red highlights make it easy to save the most important ideas in a text along with the page numbers on which they were discussed. This method is practical for quickly reviewing texts. You don't need to write any paraphrases or summaries or decide whether or not to save a direct quotation. You can always do that later on if you want. By clicking **Show in PDF**  you can jump directly to the highlighted text passage – either from the *Knowledge Organizer* or while writing your text using the *Word Add-In* (see [page 16](#)). Then you can decide if you just need a simple reference or if you want to paraphrase or directly quote the passage.

Highlight (Less Quickly) in Red

1. Select text with the **Text selection tool** .
2. Click the **red highlighter** . Citavi highlights the text in red, but the red highlighter does not remain enabled.
3. Same as Step 3 above.

 **When to use:** This method is good if you want to switch between red highlighting and other annotation options. For example, you could save direct quotations and create comments or summaries, which will then help you later on while writing your paper. You could use the red highlighter for passages you don't want to cite directly, but which you'll refer to in your text with "cf".




Adding Direct Quotations (Blue)


Use direct quotations if you want to save the exact wording of a text passage. With a single mouse click you can transfer the text to Citavi. However, you should be careful with some PDFs – see step 4.

Selecting Text and Creating a Direct Quotation

1. Use the **text selection tool**  to select the text you want to highlight:



2. Click **Direct quotation** . The selected text is highlighted in blue and a knowledge item is created on the **Quotations, comments** tab. The core statement is created automatically from the first highlighted words.
3. Edit the core statement. Enter categories, groups, keywords, and page numbers as needed.
4. **Double-check the quotation text.** Sometimes you might need to make corrections. For example, if you created a quotation out of several separate text passages, you'll need to insert ellipses for the omitted text. If a quotation extended over two pages, you'll have an unnecessary line break. From some PDFs the formatting (bold, italics) can't be imported. From others you might see unnecessary hyphens. Make any necessary corrections in the quotation window. To open it, select the direct quotation on the **Quotations, Comments** tab and click **Open in window** .
5. **Changes.** Anytime you shorten the text of a quotation or make insertions, you should not change the meaning of the quotation and you must designate your changes according to the conventions of your academic discipline. Click **Open in window**  to open the quotation in the quotation window.
6. **Comments.** If you want to add your own comments to a quotation, insert a new paragraph and add the comment in brackets with your name or initials. To avoid any mix-up, we recommend creating adding the comment as a separate knowledge item (see [page 9](#) under *adding a comment*).

 **When to use:** The number of direct quotations you save depends on the text, but also on your text analysis preferences. Citavi supports many different methods.


Some Citavi users only save direct quotations if they're sure that they'll want to use them in their document. As a result, they'll only save a limited number of these quotations in their projects. Instead, they'll rely more on indirect quotations, summaries, etc.

Other users save direct quotations almost exclusively. Later when writing their papers, they'll decide if they want to cite something word-for-word, use a paraphrase, or insert a simple reference.


Adding Indirect Quotations (Purple)


Use indirect quotations if you want to restate the main ideas of a text passage in your own words. If you just want to refer to a text passage without having to formulate a paraphrase, use the *red highlighter* (see [page 4](#)). If a text passage is a longer section or chapter, create a *summary* instead (see [page 7](#)).

Select Text and Create an Indirect Quotation

1. Use the **text selection tool**  to select the text you want to highlight. The icon toolbar is displayed:




2. Click **Indirect quotation** . The selected text is highlighted in purple and a core statement appears in the new quotation on the **Quotations, Comments** tab. Citavi generates the core statement automatically using the first few words in the selection.
3. If necessary, make changes to the core statement to better reflect your understanding of the text passage. Enter categories, groups, keywords, and page numbers as needed.
4. Enter a paraphrase of the original text in the **Text** box. If you use any terms or exact wording from the original text, set it off in quotation marks.
5. **Comments.** Indirect quotations should not change the original meaning of the text passage. Of course, some interpretation is involved any time you restate the meaning of a text in your own words. It can be a fine line between an „objective“ restatement and a „subjective“ comment. Try to clearly distinguish between the two. If you want to add a comment to an indirect quotation, make sure it's readily distinguishable from the indirect quotation. For example, use a new paragraph and place your text in square brackets with your initials. To make it even easier keep comments and quotation separate, create a comment as a separate knowledge item and add it to the indirect quotation. See *Adding comments* on [page 9](#).

 **When to use:** It makes sense to add indirect quotations when analyzing important texts whose contents you later want to discuss in your paper more closely. Academic disciplines dealing with the study of texts often use this method. Writers in these disciplines will often summarize the current state of discussion and then extend it through their own contributions. Other disciplines tend to primarily use short citations of thematically related sources (see [page 4](#)).


Adding Summaries (green)


Use summaries to reformulate the main ideas of a longer section of text, such as a chapter, in your own words. If you want to paraphrase a shorter text passage, create an *indirect quotation* (see [page 6](#)).

Selecting a Text Passage and Adding a Summary


1. Use the **text selection**  tool to select the text you want to highlight. If you want to summarize an entire chapter or subchapter, you can simply select the heading. The icon toolbar is displayed:




2. Click **Summary** . The selected text is highlighted in green, a green highlight appears in the margin, and a core statement appears in the new summary on the **Quotations, Comments** tab. Citavi generates the core statement automatically using the first few words in the selection.
3. If necessary, make changes to the core statement to better reflect your understanding of the text passage. Enter categories, groups, keywords, and page numbers as needed.
4. Enter a summary for the original text in the **Text** box. If you use any terms or exact wording from the original text, set it off in quotation marks.
5. **Margin and text highlights.** When you're done editing the summary, the text highlight will disappear. Only the margin highlight will remain visible. When you hover over the margin highlight, the text highlight will temporarily appear. Click the margin highlight to display the text highlight.

 **When to use:** Most journal articles include abstracts containing a summary of the entire text (to save abstracts, see [page 13](#)). In this case, there's not much of a need for you to come up with your own summary. It's a different case altogether for longer texts that you later might want to reference in your paper. In any discipline that uses a great deal of text analysis, summaries have a similar importance to indirect quotations (see [page 6](#)). Summaries can also be useful if you are reading some of the central texts in a discipline or are analyzing an author's oeuvre.


Adding Comments (Orange)


Create a comment for a text passage if you want to save you own comments, evaluations, or critical remarks on a text passage. If a text passage inspires a new idea, you can save it as a comment. If an idea is not related to a text passage, you can use the *thought*  knowledge item instead. And if your comment involves a task (for example „These claims sound a bit exaggerated. Verify.“) then you should create a *task* for the text passage (see [page 10](#)).

Selecting a Text Passage and Adding a Comment

1. Use the **text selection tool**  to select the text you want to highlight. The icon toolbar is displayed:



2. Click **Comment** . The selected text is highlighted in orange, an orange highlight appears in the margin, and a core statement appears in the new comment on the **Quotations, Comments** tab. Citavi generates the core statement automatically using the first few words in the selection.
3. If necessary, make changes to the core statement to better reflect your understanding of the text passage. Enter categories, groups, keywords, and page numbers as needed.
4. Write your comment in the **Text** box and add your name or initials if desired (see below).
6. **Margin and text highlights.** When you're done editing the comment, the text highlight will disappear. Only the margin highlight will remain visible. When you hover over the margin highlight, the text highlight will temporarily appear. Click the margin highlight to display the text highlight.

 **When to use:** Use comments to save you own thoughts on a text passage that you later want to include in your paper. If you're working on a project with others, make sure to add your name to the comment so other members know it's from you. The other group members can then add their own comments with their own initials.







Alternatively...


If you already added a text passage as a quotation, etc. and want to comment on it, you can add a comment to the knowledge item rather than to the text passage itself.

Adding a Comment to an Item (orange)

If you have already saved the text passage you want to comment on as a knowledge item, you can add a comment to the knowledge item.

Adding a Comment to an Existing Knowledge Item

1. On the **Quotations, Comments** tab, select the knowledge item that you want to add the comment to.
2. On the **Quotations, Comments** tab, click **New**  **New** .
3. On the dropdown menu, click **Add comment to item**. The quotation window opens. The core statement, page range, categories, and groups are added automatically from the selected knowledge item.
4. Enter your comment in the **Text** box and click **OK** to close the window. On the **Quotations, comments** tab a new comment appears underneath the corresponding knowledge item. To the right of it you will see the **broken link**  icon.
5. Click the **broken link** , select the text passage in the PDF the comment is based on, and then click the **broken link**  again. The icon changes to the **link**  icon to show that the link between the comment and PDF has been established.


 **When to use:** See usage notes on [page 8](#).

You can add comments directly to a direct or indirect quotation (see [page 5](#), no. 6, and [page 6](#), no. 5). The disadvantage is that you won't be able to see if a quotation has had a comment added to it in the list of knowledge items. For this reason, we recommend saving standalone comments as described here and on [page 8](#).


Adding Tasks (Turquoise)

Sometimes you might read something that gives you an idea you want to pursue later on. You can add tasks to text passages for this purpose:


Selecting Text and Assigning a Task

1. Use the **text selection tool**  to select the text you want to add a task to. The icon toolbar is displayed:



2. Click the **Task**  **Task** ▾ icon.
3. Select a task from the menu. The selected text is highlighted in turquoise, a turquoise highlight appears in the margin, and the new task appears on the **Tasks & Locations** tab.
4. If you want to add additional information to the task (due date, priority, etc.), open the task window by double-clicking the task.

Margin and text highlights. When you're done editing the task, the text highlight will disappear. Only the margin highlight will remain visible. When you hover over the margin highlight, the text highlight will temporarily appear. When you click the margin highlight, Citavi will switch to the task on the **Tasks & Locations** tab.

 **When to use:** Four tasks related to text analysis are already predefined:

Discuss: If you want to discuss the thesis statement, findings, or conclusions of a paper or passage with your team members or with your advisor. **Examine and assess:** If you find a claim in the text that you doubt the accuracy of or want to double-check. **Go through bibliography:** If the bibliography likely contains additional sources that you might want to add to Citavi (see [Analyzing a Bibliography](#)). **Read:** A publication was cited either in the text or bibliography that you want to read. You can also add your own tasks to the list of predefined tasks.


Saving Image Quotations

Use image quotations to save images or tables from a PDF. Citavi saves the image as a high-resolution JPEG. However, many PDFs contain low-resolution pixel images. As a result, these images will not have a high resolution in Citavi.


Technical Background


- Perhaps you want to save a table as text in order to edit it to fit the formatting in your paper. Since the table is in PDF format, you are unable to do so. If you try, you will likely have to do a lot of extra work. Saving the table as an image quotation is usually much easier.
- To save a clear image, you do not need to change the settings in the Citavi preview. It doesn't matter which size you display the PDF in; the image quotation is always saved in DIN A4 format with approximately 4200 x 5900 pixels. This resolution guarantees a high-quality image in your paper later on, as long as the original image was also of high-quality, which unfortunately isn't always the case.

Selecting an Image and Adding it as an Image Quotation

1. Use the **snapshot tool**  to drag a border around the part of the PDF that you want to save as an image quotation. The icon toolbar is displayed with the available options:




2. Click **Image quotation**  **Image quotation**. Citavi opens the quotation window.
3. Edit the *Caption*. The text from the caption will later be visible in the Word Add-In on the *Knowledge* tab and is inserted as a caption in Word when you insert the image with the Add-In. In the *Caption* field you should also include copyright information if applicable. Add the original caption of the image in the *Description* field if your caption differs from it.
4. Often images, figures, and tables you find in a PDF also come from other sources. If the original source is available, you should use it. If not, you should create a secondary citation. Add the original source information to the *Description* field.
5. In the quotation window, click **OK**. The image is saved in the *Citavi Attachments* folder for the project. It also appears on the **Quotations, Comments** tab. The highlighted region of the PDF is shown in blue.

 **When to use:** Images are often used to depict facts, relationships, processes, and results in a compact and understandable way. For this reason you might want to save them as quotations. As described above, it's important to make sure that you keep track of the source information for the image.


When Text in a PDF cannot be Highlighted








In some PDF files or sections of PDF files, text cannot be highlighted or copied. This can occur if the text was originally scanned as an image and later converted to PDF format. If this is the case, use the snapshot tool to link direct quotations, indirect quotations, summaries, comments, and tasks with the corresponding location in the PDF.

Using the Snapshot Tool

1. Use the **snapshot tool**  to drag a border around the image or table. The icon toolbar is displayed:



2. If you want to add a *direct quotation*, select **Image quotation**  **Image quotation**. Citavi opens the quotation window. Enter the core statement in the *caption* field and fill in the other fields as you would for a normal *direct quotation* (see [page 5](#)).
If you don't want to have to type the text later on, you can use an optical character recognition program to convert the images to text. Your image quotations are saved with the Citavi short title in the **Citavi 5** folder under **Projects > [Project name] > Citavi Attachments**. However, it's usually not worth the trouble unless you're working with a great deal of image quotations and can do the conversion all at once. If you only have a couple of text images in your project, it's probably easier just to retype the text.
3. Other knowledge items can be directly linked with a section you've selected with the snapshot tool. Simply click on the knowledge item you want to use in the icon toolbar. Then, fill out the form on the **Quotations, Comments** tab as you normally would (see [pages 4](#) through [10](#)).
4. Citavi uses in-text highlights for direct and indirect quotations and for red highlights. Summaries, comments, tasks, etc. have marginal highlights. The colors follow the pattern described on [pages 4](#) through [10](#).

       **When to use:** Saving text as an image is a workaround. It can be useful for linking your annotations with the exact text passage even if the PDF is only available in image format.


Alternatively...

You can also take a screenshot, use an OCR program to convert the image to text, and then copy it to the text box of the *Direct quotation* form. This method works for image PDFs and for PDFs that are read-only. However, it may not be worth the additional effort.

Adding Abstracts and Tables of Contents


Abstracts and tables of contents are saved in the *Reference Editor* on the *Content* tab only. They do not appear in the *Knowledge Organizer* or in *Citavi's Word Add-In*.

Adding Abstracts and Tables of Contents

1. Use the **text selection tool**  to select the text you want to save as an abstract or table of contents. The icon toolbar is displayed:




2. Click **More** [More](#) ▾.
3. Select **Abstract** or **Table of contents** from the menu. The selected text is highlighted in gray, a gray highlight appears in the margin, and Citavi opens the *Contents* tab. The abstract or table of contents is displayed there.
4. If you want to edit the abstract or table of contents, simply click the blue link that appears above the text.
5. **Margin and Text highlights.** When you're done editing the abstract or table of contents, the text highlight will disappear. Only the margin highlight will remain visible. When you hover over the margin highlight, the text highlight will temporarily appear. Click the margin highlight to display the text highlight. Citavi opens the *Contents* tab.

 **When to use:** Journal articles often already include an abstract. Tables of contents are usually only available for longer texts. Both give you a quick overview of the contents of the PDF. Since you already saved the PDF in Citavi, you may decide that you don't need to also save the abstract and table of contents. One advantage is that you can then quickly view both on the *Overview* tab. In addition, Citavi's search feature also searches abstract and tables of content fields. This lets you quickly see the relevance of a text for a particular search query.

Adding Keywords from a PDF

Keywords can easily be added to Citavi from a PDF and are useful for describing references.


Adding Keywords from a PDF

1. Many journal articles include keywords underneath the abstract. These are usually keywords that were selected either by the author or publisher. Instead of copying keywords one-by-one, use the **text selection tool** . The icon toolbar appears:



2. Click **More** [More ▾](#) or press the **W** key (see [page 18](#)).
3. Select **Keywords** from the menu. A window appears in which the keywords are listed as Citavi interpreted them. Usually, you won't need to make any changes, unless the original source used uncommon punctuation.
4. If necessary, correct the list by selecting a different separator and clicking **OK**. Citavi opens the *Context* tab where the keywords are displayed. Keywords are not highlighted in the PDF file.

Alternatively...

1. Even if the PDF doesn't include keywords, you might find terms or combinations of words in the text that you want to save as keywords. Use the **text selection**  tool to select the text you want to save as a keyword. The icon toolbar appears:



2. Click **More** [More ▾](#) or press the **W** key (see [page 18](#)).
3. Select **Keywords** from the menu. If you only select one word, it will automatically be saved on the *Contents* tab. If you save a combination of words, the keywords window will open. Continue as described above under point 4.

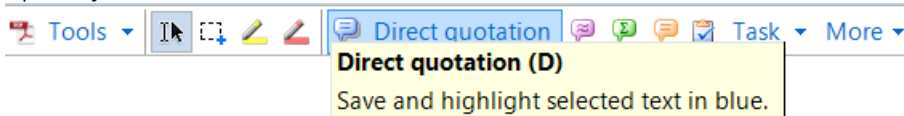
Hints for Selecting Text

Selecting Text

1. Click the **text selection tool**:  :



2. As soon as you've selected text, the icon toolbar is displayed with all available options. Place the mouse above the various icons to view information (tooltips) about each option. Then, select the option you want to use:



Sometimes it's not this straightforward. If this is the case, use the hints below.

Hint 1: Combine multiple text passages in one text selection

Problem: You want to cite text that continues on another page. In PDF format it's not possible to select across a page break without also including footers, headers, and page numbers that appear in the selection.

Or, you may want to save a single statement from a long sentence that contains relative clauses, text set off by dashes, or comments in parentheses.

Solution: After selecting the text passage, press and hold the **Ctrl** key. You then can add additional text to the selection. Most word processors also let you add text to a selection in this way.

Hint 2: Removing parts of a passage from a text selection

Problem: You accidentally selected too much text.


Solution: Press and hold the **Shift** key. At the same time, press and click while dragging the mouse over the text you want to remove from the selection.

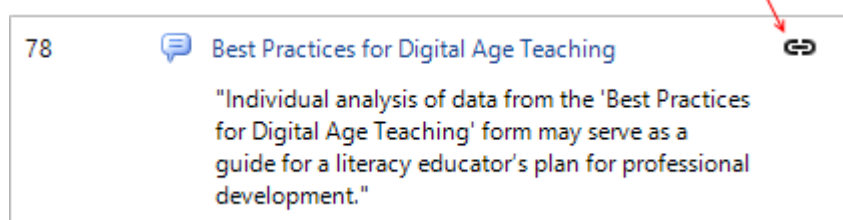
Creating or Correcting Links

Automatic Links

Highlighted text passages are automatically linked in Citavi to the following places:


- The *Quotations, comments* tab
- The *Knowledge Organizer*
- The *Citavi Word Add-In*.

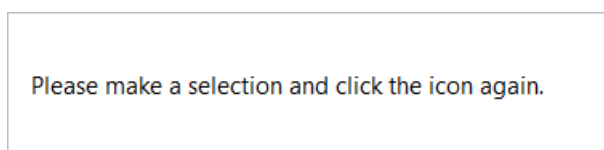
The **Show in PDF** icon  lets you know that the item is linked to a specific place in the PDF.



When you click the link, Citavi opens the PDF in the preview and highlights the corresponding text passage or image. This lets you easily double-check the context of the quotation or other knowledge item. You can also double-click a highlight in the PDF to jump to the corresponding entry on the **Quotations, Comments** tab.

Missing Links

Missing links are designated by the **Broken Link**  icon. Clicking the icon displays a message telling you how you can correct the link:



Yellow Highlights are Not Linked

You'll see links for all annotations you make in a PDF, except for yellow highlights. As a result, yellow highlights cannot be viewed in the Knowledge Organizer or Word Add-In. However, this also has its advantages (see [page 3](#)).

Deleting Knowledge Items and Highlights

Deleting a Knowledge Item

1. Right-click a knowledge item on the **Quotations, Comments** tab.
2. Select **Delete quotation** on the menu and click **OK** on the Window that appears. The knowledge item and its corresponding highlight in the PDF are deleted.
3. To delete a task, click the **Tasks & Locations** tab, right-click the task, and select **Delete task**.

Deleting and Changing a Highlight


It doesn't make much sense to delete a highlight but retain the knowledge item it links to, unless the highlight is in the wrong place in your PDF file. To correct it, you first need to delete the incorrect highlight.

1. Click the text highlight. The highlight appears darker. Alternatively, click the margin highlight to display the corresponding text highlight.
2. Right-click the text highlight.
3. Select **Delete** from the shortcut menu. Select one of the two options in the window that appears:

What do you want to delete?

Only the selected highlight.



The selected highlight and its corresponding Citavi item.

4. Select **Only the selected highlight** if you want to save the knowledge item but add a different highlight to it. Click **OK** to delete the highlight. The **Broken Link**  icon appears next to the knowledge item. Select the text you want to link and click the icon to join it to the knowledge item. For direct quotations, you should double-check if the text of the quotation needs to be changed as well.
5. For yellow highlights, tasks, abstracts, and tables of contents, the process follows the same pattern.










Working with Shortcut Keys

Sometimes it's easier to use shortcut keys rather than the mouse.

Shortcuts for selection tools:

E =  Text selection	T ext Selection
G =  Snapshot	G raphics Selection

Shortcuts for highlights:

Y =  Highlight	Y ellow
Q =  Highlight in red	Q uick
D =  Direct quotation	D irect Quote
F =  Indirect quotation	The F is next to the D key
S =  Summary	S ummary
C =  Comment	C omment
T =  Task	T ask
A =  Abstract	A bstract
W =  Keywords	K eywords

Additional shortcuts for working with PDFs:

Ctrl + Down arrow	Next page
Ctrl + Up arrow	Previous page
Pos1	Go to page 1
End	Go the last page
Up arrow	Scroll up
Down arrow	Scroll down
Left arrow	Scroll left
Right arrow	Scroll right
Ctrl + Mouse wheel	Zoom
Ctrl + F3	Open or close search field
F3	Go to next search result
Shift + F3	Go to previous search result
F8	Go to next highlight
Shift + F8	Go to previous highlight
F9	Export PDF annotations
Delete	Delete
Esc	Cancel

Understanding Layers

Image to the right: As a default, Citavi does not save annotations in the PDF file. Instead, annotations are saved in a transparent layer over the text. The PDF is not changed in any way.

This has two advantages: First, editing and saving annotations is faster, especially if the PDF is saved on a network drive or in the cloud. Second, PDFs can then be used by multiple people each saving their own individual annotations (see [page 23](#)).

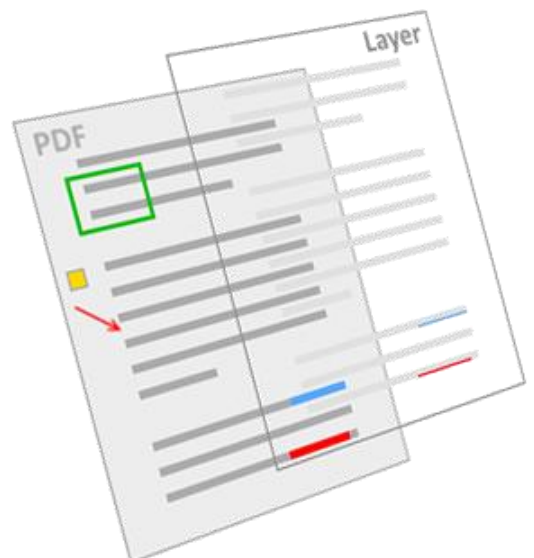


Image to the left: The PDF itself will only be changed if you **export** your annotations to the PDF. After that you can view your highlights in an external PDF reader.

When to use: If you want to give the PDF file to another person (see [page 20](#)) or if you want to continue working with it on the go in an external reader on a tablet or other device (see [page 21-22](#)).

Image to the right: All annotations made in an external PDF reader are saved in the PDF, but only highlights will be displayed in Citavi and will be available for further editing.

Technical background: If you open a PDF file that was annotated in another PDF reader, all the notes, arrows, lines, etc. will be ignored and only the highlights will be copied into the Citavi layer. They'll appear in the same color as in the external reader but will be displayed as underlines instead of highlighted text. See how you can continue working with your highlights on [pages 21-22](#).



Giving Copies of Annotated PDFs to Others

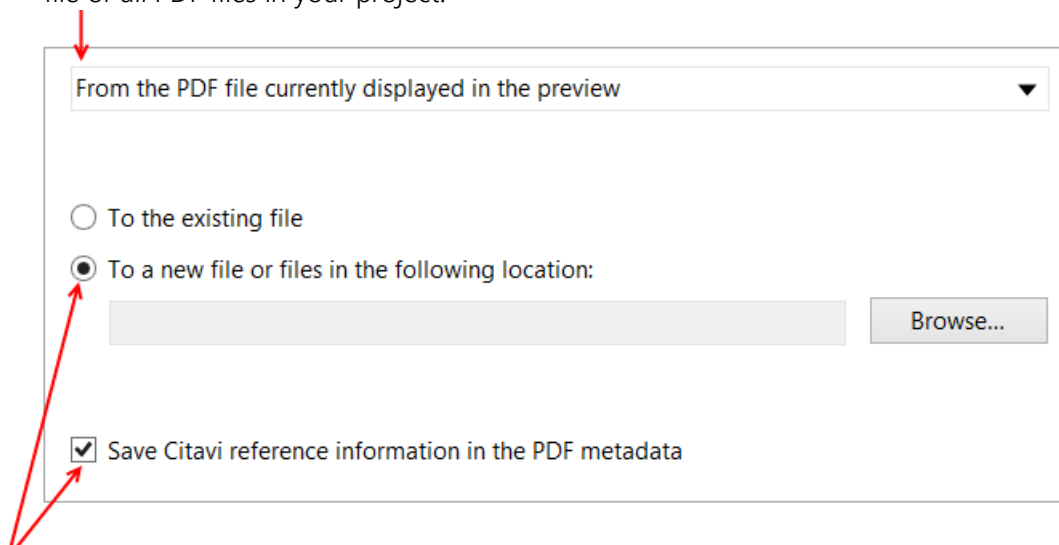
Your annotated PDF files can easily be shared with another person, as long as they aren't licensed files that the recipient doesn't have a license for. All you need to do is to export the highlights to a copy of the PDF.

- The PDF file you are working with in Citavi remains **unaltered**.
- Only your **highlights** are visible in the copy of the PDF. Any text you save for these highlights (quotations, comments, etc.) is not exported to the copy of the PDF.*



Exporting PDF Annotations

1. In the preview pane, on the **Tools** menu, select **Export PDF annotations...**
2. In the window that appears, select whether you want to export annotations for the displayed PDF file or all PDF files in your project.



3. **Important:** Do not export highlights into the existing file. Instead, select a location on your computer or on an external drive. Only clear the **Save Citavi reference information in the PDF metadata** option if you think the bibliographic information in your Citavi project is incorrect.
4. Click **OK**. The copy containing all of your highlights is saved with the short title and can be sent to your colleagues.

* If the recipient is also a Citavi user, you can send all the PDFs you've saved in Citavi. Simply export the references to a new project (**File > Export**). You can then compress the project folder and send it as ZIP file.

Viewing PDFs with an External PDF Reader

You can easily read and highlight new PDFs with an external PDF reader. However, a more involved analysis should be done within Citavi.

Importing PDF Annotations

1. You're away from the computer on which Citavi is installed but are reading PDFs on another device, such as a tablet or smartphone.
2. You can highlight interesting sections of the text with the reader's **yellow highlighter**. The first time you are importing from another reader, only use yellow highlights (see [page 3](#) and the bottom of [page 19](#)).
3. Scenario A:
If you haven't already saved the PDF file in your Citavi project, copy the PDF file to your computer. In Citavi click **References > Import > PDF files**.

Scenario B:

If the PDF file is already saved in your Citavi project in the folder **Citavi 5 > Projects > [Project name] > Citavi Attachments**, overwrite the old version with the new, freshly edited version.

4. In Citavi the yellow highlights from the external PDF reader are displayed as yellow underlines, [see image](#). If desired: click a highlight and then save it as a knowledge item as described from [page 3](#) onwards.
5. You can also save the yellow underlines as yellow Citavi highlights. However, it's not really necessary and takes additional time.



Please note

It's even easier to work with a new PDF file in Citavi. However, the method above is a good alternative if you're working away from your computer and Citavi is not available.

Analyzing PDFs with an External Reader

If you want to more intensively analyze a PDF file with an external reader rather than just making simple highlights as described on [page 21](#), it can be a bit difficult. To make it easier, save the PDF file on a network on a server or in the cloud. This lets you easily work with a single PDF file across all devices and saves you from having to copy the file back and forth.



Continue Analyzing PDF Files in an External Reader

1. Analyze the PDF in Citavi first.
2. To continue working with a PDF file in an external reader, export the highlights to the existing PDF file by clicking **Tools > Export PDF annotations...** ([see figure above](#)).
3. When analyzing the PDF in an external reader, only use highlights (see [page 19](#)). Use colors that roughly correspond to the Citavi color system, for example blue for text passages you later want to save as direct quotations or purple for sections you want to save as indirect quotations.
4. The next time you open the PDF in Citavi, the external highlights are automatically copied in the layer and displayed as underlines ([see figure to the left](#)). This lets you easily distinguish new **external** highlights from **internal highlights**.
5. Change all highlights made in the external reader to the corresponding knowledge item in Citavi. The underlines are changed to Citavi highlights.
6. If you want to analyze the PDF in an external reader again, you will need to export the annotations to the PDF file a second time ([see figure to the right](#)).



Please note

This process is a bit time-consuming and recommended only in special circumstances. It can go a bit faster if you choose the corresponding option under **File > Project properties > Paths**.



Using PDFs in Different Group Scenarios

A repository of PDFs for multiple projects

Workgroups in universities, organizations, or companies can use Citavi to create a repository of PDFs saved on a local server or in the cloud. Group members can then save copies of PDFs from the project for their own individual or group projects.

To save disk space, they can also link to the PDF directly. In this case, PDF annotations should never be exported to the original PDF (see [page 20](#)). Instead, each group member should simply work with layers in their Citavi projects (see [page 19](#)).

In this way a single PDF file can be used in multiple projects and annotated individually by each group member.

A common project with shared PDF annotations

The work of analyzing and annotating PDF articles is usually shared among several group members. Annotations can be used, added to, or corrected by all group members. Citavi supports different ways of working with texts. Ideally, group members should decide which annotation features they want to use and how they want to use them before beginning a project.