Citavi-6 Projects: Safe and Sound

Why is it important to back up your Citavi data?

You collect and store the basis of your research project or thesis in Citavi – the work that costs you weeks, months, or even years. Imagine you have been collecting your sources in Citavi for months and now when you are about to start writing, your computer breaks down. Or your laptop gets stolen. In this case, saving your Citavi project only on one device might end up in a disaster.

To spare you such surprises and unnecessary stress caused by data loss, we have compiled this handout with tips on backing up your Citavi data.

The basic principle of data backup: 3 – 2 - 1

We recommend to regularly save your Citavi projects AND citation styles you have created yourself on external storage devices. As the basic **3-2-1** rule for data protection goes:

- **3** copies of documents in at least
- **2** different places on more than
- **1** type of memory device

For example, you can save your data:

- on your laptop (in your backpack);
- on a USB flash drive (in your pocket);
- in a cloud.

Which data protection methods are best for you depends on whether you work in a local or a cloud project.

A local project or a cloud project?

Citavi offers two options for saving your projects:

 Cloud project — Your project will be stored in the Citavi cloud.

 Local project — Your project will be stored on your device.

What should be considered when choosing between a cloud and a local project?

Cloud project:

- can be shared with others and, thus, is suitable for group work;
- practical if you work on multiple devices;
- currently can store up to 5 GB of data. This will soon be limited to 2 GB only. Attachments can be compressed if necessary.
- You can also work with a cloud project offline:
  https://www1.citavi.com/sub/manual6/en/index.html?working_offline.html

- The server for the Citavi cloud is not located in Germany and, thus, is not subject to the German Data Protection Law. The respective data centres belong to Microsoft and are affected by the CLOUD Act. This implies that the US agencies which can request the release of information through American operators can also request the release of data located outside the USA.

Local project is a good option if:

- you work on your project alone;
- you use the same device for your work.

Consult this Citavi 6 manual for more information about Citavi cloud: https://www1.citavi.com/sub/manual6/en/index.html?using_citavi_cloud.html

The manual also provides instructions for switching between different project types: https://www1.citavi.com/sub/manual6/en/index.html?converting_local_project_to_cloud_project.html

Backup of the project: archive or copy?

Citavi 6 offers different options of backup of your projects. Open your project in Citavi. In the *File* menu, select *This project* and choose how you would like to save it.

Archive project:

- includes the project file and selected attachments;
- compressed (.zip format) and doesn't take up much space;
- has to be created manually;
- can be created from cloud as well as from local projects.
- When saving a current copy of the archive the older copy is overwritten. This way, you always have the latest version of your project, unless you rename the archive copy each time manually.
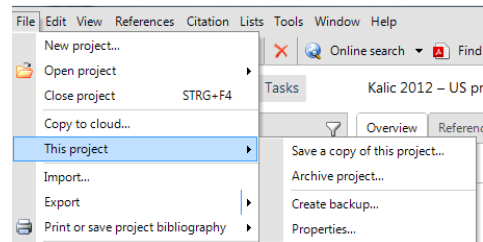
Copy of a project:

- contains the project file and attachments;
- not compressed (.xml format);
- can be created from cloud as well as from local projects;
- Tip: rename the copies of your project to avoid mistaking it for the original, e.g. add the date to the name (Project_name_DDMMYY).

The file location of the archive and project copies can be set individually.

Saving custom citation styles

If you edit a citation style, the file with this style will be stored in the folder *Documents -> Citavi 6 -> Custom Citation Styles* on your computer. This file is not stored together with your projects. If you work on multiple computers, you need to copy the file to the folder *Citavi 6 -> Custom Citation Styles* on each computer.

Backing up local projects

C:\User\USERNAME\Documets\Citavi 6

Projects

Custom Citation Styles

Citavi 6

Backup
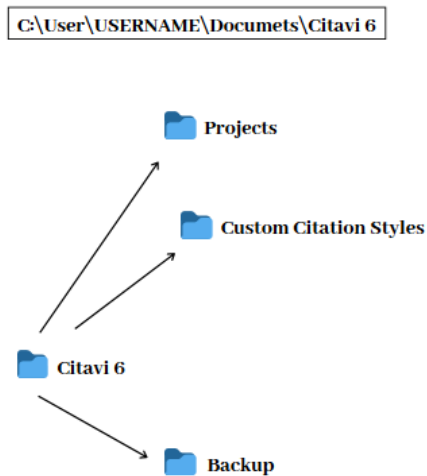
- Citavi stores your projects in the folder *Documents* on your computer.
- The most important file is the Citavi project file in the folder *Projects* – it includes all references, keywords, categories, citations and summaries.
- The folder *Attachments*: this is a sub-folder of the current project in *Projects*.
- The *Backup* folder: here you will find the backup of your project data and the word documents. Both are created automatically by Citavi. Please note that project files are stored in the *Backup* folder without attachments.
- *Custom Citation Styles*: here you will find the citation styles you have created or edited manually.

Tip: customising file locations

Backup folder:

It is advisable to change the file location for this folder – in case of "emergency" it would not be helpful to have your backup file on the same device as your project file. Choose a different location for your backup file: *Tools -> Options -> Folders -> Backups*.

Attachments:

It is recommended to store your PDF files and other Citavi attachments separately from the project. It can be practical to save your attachments not to the project folder, but to another folder on your computer or in a cloud. This is also useful if you have a large number of files in the *Attachments* folder or if you want to access the same attachments from different Citavi projects.

To change the file location of attachments. *Citavi 6 -> File -> This project -> Properties… -> Attachments -> Path for attachments*. Please note that if you usually save your files in a cloud, you have to work online to be able to access them.

Don't forget to save attachment even if you have changed the usual file location.

Data backup for local projects:

The easiest way is to create an archive of a project with attachments, for example:

- Working device: an archive on a laptop or desktop-PC.
- Offline backup: an archive on a USB-device (not to be stored together with the computer) or an external hard drive.
- Online backup: an archive in a cloud (e.g. GWDG-Cloud).

Backing up cloud projects

Citavi synchronises any changes made in your project with the cloud. The relative stability and the constant synchronisation create an impression of safety. Though, backing up your cloud projects is important nonetheless!

C:\User\USERNAME\Documets\Citavi 6

Projects

Custom Citation Styles
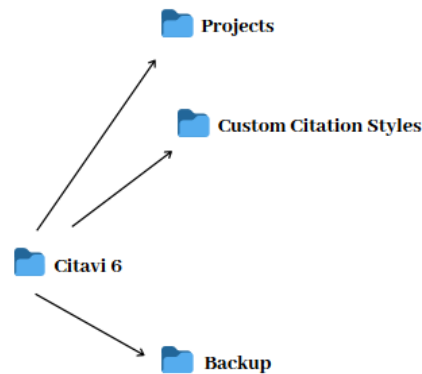
Citavi 6

Backup

What you must know about backing up your cloud projects:

Projects: Citavi stores your project files not in the folder *Projects*, but in the Citavi cloud.

Backup: this folder contains only the Word or LibreOffice files connected to your cloud project.

Custom Citation Styles: custom citation styles are stored here. Don't forget to save them separately from the project.

Tip: settings and options

You can modify the following settings in the Citavi project: *File -> This project -> Properties..*:

- *Attachments*: you can save your attachments to your computer to make sure you can access them offline.
- *Statistics*: here you will find all the elements included in your project and the size of memory space it requires (bottom right).

Data backup for cloud projects:

The easiest way is to save an archive copy of your project with attachments, e.g.:

- Original file: in the Citavi cloud
- Backup 1: an archive copy with attachments on your computer, on a USB device (not to be stored together with the computer!) or an external hard drive
- Backup 2: an archive copy in a cloud (e.g. GWDG-cloud)

Should it happen that you have no backup of your cloud project and the data has been accidentally deleted, refer to Citavi support. You can recover a backup copy of the last version of your project. In Citavi 6.2 and later versions you can restore the deleted files from the recycle bin. Refer to the following instructions in the manual: https://www1.citavi.com/sub/manual6/en/index.html?using_backups.html

Further important information on cloud projects can be found here: https://www1.citavi.com/sub/manual6/en/index.html?about_saving_in_cloud_projects.html

We wish you the best of luck with your projects!