## Citavi

### Lumivero

**Available to purchase until 30/06/2027**

All-in-one referencing and note-taking solution, designed for individuals and teams. With Citavi you can search resources from around the world, create tasks, analyze texts, save quotations and ideas, create outlines for drafts, and write reports, articles, or books. Citavi is now owned by QSR, the parent company of NVivo.

# Key Facts

## Benefits

- Heavily discounted pricing for the academic community
- Fixed pricing for 3 or 5 years (depending on term you choose)
- Pricing Banded based on institutional combined staff and student FTE
- Site licence
- Free major software upgrades at the time they are released
- Can be purchased as a standalone product or bundled in with NVivo

## Important dates

**Agreement Start**: 1 July 2022

**Agreement End**: 30 June 2027

**Subsequent invoice date:** annually three months in advance of the anniversary of licence start date

## Licence Type

Site Licence

## Commitment Period

Institutions will be committed to the licence for a three or five year period.

## Trial

You can test the latest version of Citavi with a free trial. **Contact Chest Help** for further information

## Eligible Institutions

Higher and Further Education, Research Councils, Associated Sites, Charities in the United Kingdom and Third Level Institutions in Ireland

## Background Information

QSR acquired Citavi, a leading all-in-one reference management and note taking solution, in 2021. This Agreement offers institutions a very viable solution to consider instead of EndNote.

Licences for Citavi (and NVivo) are not concurrent with the Agreement, meaning institutions can take out a three or five-year licence at any point and it will run for the full term, even if that goes beyond the Agreement dates.

# Product Information

## Supplier Details

**Licensor:** Lumivero, 1331 17th Street, Suite 404, Denver, CO 80202.

## Product Description

Please see further down for information about purchasing Citavi and NVivo

## Citavi For Users

**Manage references:** Citavi combines reference management and knowledge organization. With Citavi you can search resources from around the world, create tasks, analyze texts, save quotations and ideas, create outlines for drafts, and write reports, articles, or books – faster and more efficiently than you ever thought possible.

**Document expert knowledge:** Your team's findings and discussions from what they read can be organized separate from the literature making this expert knowledge available to all and easy to use and re-use in individual projects. Your knowledge stays in your organization and can be used by the entire team for years to come.

**Easily find and use information again:** Citavi's categories, groups, filters, and search help you find exactly the literature and information you need efficiently and securely.  In your documents all content can be sorted and categorized by the user. Citavi automatically creates a bibliography for your study, report or other publication – if desired with special chapter formatting. The citation style can be changed at any time with a click.

**Protect Your Insights**: Citavi offers the possibility of using your own database server in a team. This way you can fulfil the highest security standards – all the way up to being completely disconnected from the Internet.  Naturally you can also save your data locally on a shared Windows network drive or online in the Citavi Cloud – it's your choice.

**World-Class Support**: Citavi is so easy to use that you can master the basics in no time at all with on-screen help texts and guides to basic features. And if you ever do have questions? You can rely on Citavi's fast and friendly support team.

## Citavi For Academic Libraries

**A Common Purpose**: Academic libraries and Citavi share the same goal: helping students, faculty, and staff research better and more efficiently.

**Information Literate**: With Citavi, students learn about search strategies, using the library, managing sources, organizing information, and writing academic papers. Help your users navigate the world of information and develop their research skills.

**We Put the Focus on Your Library:** Participants in Citavi training sessions learn how to search your library catalogue and save the results in Citavi – along with keywords and call numbers. With Citavi you can also use your linkresolver and databases your library has subscribed to. Keep Citavi users at your institution in the know by publishing your news on the Citavi Welcome Screen. Course participants learn about the entire spectrum of your services – and will leave wanting to use them.

**Your Companion for the Digital Age:** Citavi at academic libraries: a win-win situation. Over 300 universities have a site license for Citavi. That's because Citavi helps libraries shape their digital offerings and support students, faculty, and staff with the multitude of new search possibilities and media.

**We Help You Succeed:** We want you and your users to have a great experience. First, we help you promote Citavi with flyers, posters, and print templates. Then, once everyone knows about Citavi, we offer you the perfect support: training videos, introductory guides, and a comprehensive user manual, so no question is left unanswered.  You can download a set of the most important training materials **here**.

**Citavi on any Operating System:** With Citavi Web you can work anywhere you have an internet connection and on any operating system, regardless of whether it's Mac OS, Windows or Linux. The only thing you need is a current browser.

**Never at a Loss for Words:** If you ever can't help one of your users, you can rely on Citavi's fast and world-class support: They'll answer your question as soon as possible to make sure that your users don't lose any time. Current satisfaction rate: 98% (based on over 1000

responses).

## Citavi and NVivo

Citavi comes to you from QSR, the company behind NVivo.  QSR offer a bundle price for institutions purchasing Citavi and NVivo (or for institutions adding Citavi to an existing NVivo licence).  NVivo is probably the most commonly used qualitative data analysis software in UK and Irish academia right now, so there is a very good chance your institution already has an NVivo Licence.  Please see the Products and Pricing page for more information on pricing.

If you are purchasing Citavi and already have an NVivo licence, your NVivo licence will automatically be upgraded to NVivo Plus if you are not already using Plus.

If your institution already holds a licence for NVivo and you wish to take advantage of the Bundle pricing, you must purchase a Citavi licence of the same duration as your NVivo licence (select three or five years accordingly).  If in doubt, please check with Chest.  Your first year payment will then be pro-rated to tie in with your institution's NVivo licence.

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# Service and Support

## Trials

You can test the latest version of Citavi with a free trial. Please contact Chest Help for further information

## Product Documentation

A wide range of materials to assist Network Administrators and users can be found at the Citavi Support pages (https://www.citavi.com/en/support/overview).

Tutorials are animated demonstrations that show users how to create and set up a project. They're built into the software and can be accessed from the Help menu or from the **Citavi website**.

The software's 'Help' section contains an overview of Citavi and detailed step-by-step 'how to' instructions for working with the software. Again, this information can be accessed from the Help menu in the software.

Communicate with other Citavi users in **the Citavi Forum**.

Refer to the **Citavi website** for frequently asked questions and answers (FAQs) about Citavi.

## Training and Training Materials

"We want you and your users to have a great experience. First, we help you promote Citavi with flyers, posters, and print templates. Then, once everyone knows about Citavi, we offer you the perfect support: training videos, introductory guides, and a comprehensive user manual, so no question is left unanswered. You can download a set of the most important training materials here. In addition, QSR can put organisations in touch with an expert team of trainers and consultants to help users get the most out of their QSR software. A range of services can be provided, from one-on-one consulting to group workshops on site. These services are not included in the Chest agreement and are provided for an additional fee. Contact QSR directly via training@qsrinternational.com for further information and pricing."

## Technical Support

Citavi is so easy to use that you can master the basics in no time at all with on-screen help texts and guides to basic features. And if you ever do have questions? You can rely on **Citavi's fast and friendly support team**.

## Supplier Web Address

## System releases, new versions and functionality

From time to time, QSR will release service packs for its software to address issues or provide minor enhancements. These service packs are available free of charge to all Citavi users, and can be downloaded from the QSR website.

**Major Software Releases**: An important benefit of the Chest Agreement is that you receive free major software upgrades at the time they are released. So while your Citavi Agreement is current for example, you'll receive every major version of Citavi that is released

## Platforms

Citavi is available as a Windows native version and also comes bundled with Citavi Web so you can work anywhere you have an internet connection and on any operating system, regardless of whether it's Mac OS, Windows or Linux. The only thing you need is a current browser.

## Method of delivery of product

Licence keys will be sent to the named Admin Contact at the Licensed Site by QSR International only after the completed order form has been submitted, processed and forwarded to QSR or your nominated reseller.

In following years QSR will send licence keys to the named contact within 2 weeks of the anniversary date of the licence. If you have not received your licence keys within this time, please contact Chest Help or your dedicated Account Director at QSR International, Simon Taylor, on 01925 358101.

If for any reason any of the contacts as detailed on the QSR Chest Agreement Order Form change, please inform Chest Help.

# Useful resources

**Please click on the below image to access the recent "Speed up the publishing process with Citavi and NVivo" webinar.**



# Price Banding

Price Banding for Citavi as determined by Chest and QSR using institution banding by sector, and by combined academic staff and student FTE count as in this table.

HE and Irish sites have been placed in bands can find their band here - **Site Banding**. Other sites should contact **Chest help**.

This is the same banding as for NVivo. The same rules apply. For the period 1 July 2022 to 30 June 2023, any renewing institution may renew on the same band as their previous licence. However, from 1 July 2023 onwards, sites must renew onto the correct band for their latest HESA-based FTE numbers. They will then remain on that band for the term of their licence (three or five years) unless their combined FTE figure changes sufficiently that they would move by two bands or more, either up or down. So for example, as of May 2023 a university has a current combined FTE count of 6400. On renewal in July 2023 they would renew as a band B site. However, in May 2024 that university merges with another university, taking their FTE to 9400. That is only one band different, so they would stay as a 'B' until the end of their full term. If they then opened a new faculty in May 2025, adding another 800 FTE, that'd take them to 10200 FTE, so they would have to move from Band 'B' to Band 'D' on their next licence anniversary. Any questions about this please contact Chest Help.

| Sector | Band | FTE Count |
| --- | --- | --- |
| HE Institutions in the UK | A | Up to 5,000 |
| | B | 5,001 - 6,500 |
| | C | 6,501 - 10,000 |
| | D | 10,001 - 18,000 |
| | E | 18,001 or more |
| FE Institutions in UK | F | Up to 2,999 |
| | G | 3,000 - 6,499 |
| | H | 6,500 - 9,999 |
| | I | 10,000 or more |
| Institutions in the Republic of Ireland | J | Up to 3,000 |
| | K | 3,001 - 6,500 |
| | L | 6,501 - 10,000 |
| | M | 10,001 - 18,000 |
| | N | 18,001 or more |
| Not-for-profit organisations | P | Up to 2,999 |
| | Q | 3,000 - 6,499 |
| | R | 6,500 - 9,999 |
| | S | 10,000 or more |

# Terms and Conditions

**Licensor:** Lumivero, 1331 17th Street, Suite 404, Denver, CO 80202.

**The Chest Order, together with the Licence Terms and Conditions, and any exceptions listed below, create a legally binding contract between your institution, organisation or company and the Licensor. Therefore please read the terms and conditions carefully and only submit a Chest Order if its terms and conditions are acceptable to your institution, organisation or company and you have the authority to make the financial commitment shown.**

## Licence Type

This Site licence is subject to the terms and conditions for the **Standard Chest Licence for Software (June 2011)**. There are some specific rules that apply to the use of Software outside the territory of the United Kingdom and the Republic of Ireland which are detailed at the bottom of this page.

Copying of the Software is allowed in accordance with the terms and conditions for the Standard Chest Licence for Software.

## Payment Terms

Jisc will invoice Licensed Institutions for the initial fee on receipt of a completed order. Sites will then be invoiced annually three months in advance of the anniversary of their licence start date until the end of their chosen Commitment Period.

You are advised that because of the requirement for Jisc to collect monies due before the anniversary date two charges may initially fall into one academic accounting year.

**Chest is an Enterprise of Jisc. All Purchase orders must be made out to Jisc, 4 Portwall Lane, Bristol, BS1 6NB to cover all charges plus VAT.**

All terms contained in a PO are expressly rejected and do not form part of the Licence or vary the Licence terms in any way.

Payments are due within thirty days of invoice date; recipients of late payments are entitled to interest in accordance with *UK statutory provisions*.

## Termination Clauses

At the end of the Period of Agreement, if there is no new Agreement between QSR and Chest or a new Agreement directly between the Licensed Site and QSR, then Licensed Sites are required to remove all copies of QSR Products from their systems - including personal machines which have been loaded with a copy of the software - at the expiry of their Licence (Commitment) Period.

## Location and Use Permissions

The product(s) may be used by any Authorised User of the Licensee for Educational Purposes which includes the administration and management of the licensee's educational and research operations. These permissions are described in the terms and conditions for the Standard Chest Licence for Software.

| | |
|---|---|
| Students | Yes |
| Academic Staff | Yes |
| Non-Academic Staff | Yes |
| Administration and management | Yes |
| Staff home use rights | Yes |
| Student home use rights | Yes |
| Installation on Hosted Server | Yes |

## Personal Licences

Only site licences are available under this agreement. If you would like to purchase a personal licence for NVivo then we recommend that you refer to the QSR website or contact QSR directly via email at **info@qsrinternational.com**.

## Exceptions to the Terms and Conditions

## Use of Software outside the territory of the United Kingdom and the Republic of Ireland

The use of Software outside the territory of the United Kingdom and the Republic of Ireland (the Territory) by your Authorised Users temporarily working outside the Territory is allowed **provided the Software is only installed on the Authorised Users' personally-owned computers or on computers provided to them by you**. Your Authorised Users are responsible for preventing third-party use whilst they are outside the Territory and for ensuring that Software is not loaded onto any other machine whilst they are outside the Territory. They must also still conform to the terms, conditions and restrictions on use stipulated in this Licence Agreement.

Staff and students at legal entities that are 100% owned by you, including overseas locations (that is, outside the Territory), **must be included in the total of your staff and student FTE count** when determining your charge band (see the first table displayed at 5 above). Where a legal entity that is 100% owned by you, and is included in the total of your staff and student FTE count when determining your charge band, and is outside the Territory (that is, outside the UK and the Republic of Ireland), then the nation state where that legal entity is located shall be included in the definition of "the Territory".

The Licensor and you both acknowledge that Authorised Users making use of Software outside the Territory **may do so for a period of up to three months**. Use of Software outside the Territory for any longer period is not allowed, save but by **specific written authorisation** from the Supplier*. Such authorisation may be by letter, fax, email or similar method of electronic communication and shall be communicated to an applicant Authorised User by the Licensor direct. Eduserv shall be sent a copy of the relevant authorising communication by the Licensor.

*This applies to Authorised Users travelling overseas for periods of longer than three months.  Where the user is permanently based overseas and not part of any of the above categories, they will require a separate licence.  Contact help@chest.ac.uk for further information or clarification.*