Mendeley quick start guide

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Mendeley allows you to collect, manage, share and use references you find in the course of your research. It can be used with Word to add citations and produce a reference list within a document. Mendeley has a web-based element that can be used with any Internet browser; however you need to use the desktop element to use the Citation PlugIn with Word. Mendeley is freely available and is available on Desktop@UCL.

www.mendeley.com

Mendeley also has an app for iOS and Android devices, so you can access your library on-the-go and even read and annotate PDF documents that you have in your library offline.

Mendeley's strengths include:

- Web-based version which is simple to use combined with a desktop version that gives you more features
- Ability to share references with other Mendeley users, either completely openly or as part of a closed group
- Ability to store full text PDFs within your library, and to annotate them
- Ability to create bibliographies and 'cite while you write'

1. Get going with Mendeley!

This is a brief introduction to some of the functions of Mendeley. You can view full instructions and download Mendeley from: www.mendeley.com/

Task 1: Create your own Mendeley account
Go to www.mendeley.com and click on **Create account** (top right). Set up your account by entering your details. After you have set up your account you will be presented with the option to download Mendeley Desktop. If you are logged into a Desktop@UCL PC then you do not need to download the software as it is already available on Desktop@UCL. (You will find it under the Start menu ⊞ >Mendeley desktop).

After you create your account, you will also see that you are automatically taken to your Feed page, which contains a Newsfeed. This will contain updates from people you make as contacts or groups of which you are a member.

Feed   Library   Suggest   Groups   Datasets   Careers   Funding   🔍 Library search

References which you save to Mendeley will be available under the **Library tab** (initially your library will be empty until you begin to add references in **Task 2**)
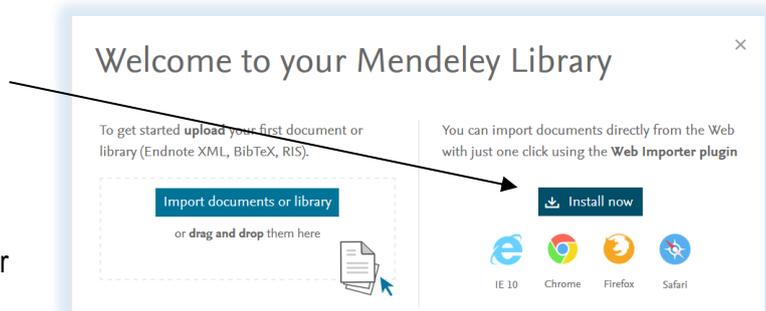
2. Adding references to your Web Library

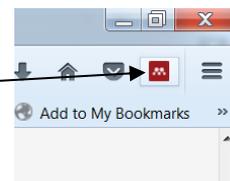**Using the Web Importer to 'capture' references**

One of the great features of web-based bibliographic software is being able to quickly 'grab' the reference you're looking at online in a couple of clicks by installing a web importer plugin or bookmarklet into your browser.

To install the Web Importer, click on the 'library' tab, and you will see an **Install now** option within the welcome box (there is also a link to install the plugin from the Downloads section at the bottom right of the Mendeley **Suggest** page).

Follow the instructions to add the Web Importer to your browser.

Once installed, if you are using Firefox or Chrome, you will see a red and white Mendeley Web Importer button at the top right of your browser. Other browsers currently use a bookmarklet importer which is saved to your favourites bar. It is not currently possible to install the Web Importer in Microsoft Edge.

Task 2: Add references to your Web Library using the Web Importer

If it isn't already there, begin by adding the Web Importer to your choice of browser (instructions above).
To use the Web Importer, click on it when looking at papers, web pages and other documents online. The Web Importer will scan your current browser window for references, and present you with its findings, which you can then choose to save as a reference in your Mendeley Library.

You can try to import references from all sorts of sites, but some sites will not work or the reference details might vary in their completeness. We have suggested some below which work to varying degrees.

Things to try:
- Go to some sources of journal articles or books that you regularly use for your research and use the Importer to 'capture' some references into Mendeley. Examples of sources you might like to try include are Google Scholar, Web of Science, Scopus, PubMed, Medline or Embase via OvidSP. For books: Explore (UCL's library catalogue), Google Books, Amazon or WorldCat.
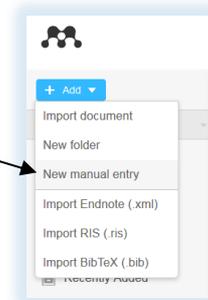
Things to think about:
- Look at the full record you have imported. Is the record complete?
- Do you get better results using the Importer from the results list, or from individual records?
- Has it imported the full text papers (pdfs)?
- Are there any other types of resource you might want to include in your library? A web page for example?

> **TIP:** Mendeley is owned by Elsevier. If you are using **ScienceDirect** or **Scopus** (other Elsevier solutions) then you can use the built in 'Export' or 'Save to Mendeley' option to easily save references to Mendeley web (select RIS or BibTeX if prompted).

Manually adding references

You can add details of references manually by clicking on the **Add** button (**top left** of your Library), and then selecting **New manual entry**. A template for you to fill in appears on the right.

Adding a reference from Mendeley's research catalog (Papers)

When a Mendeley user adds a reference to their library, the reference is then included in Mendeley's online research catalog (Papers). Any Mendeley user can then find the reference and add it to their library. To search for references within the **Papers** catalog start from the **Feed page** and click on [Q Search] (top right).You can then choose to search the Papers catalogue, or you could search Groups or for the name of a researcher (People).

Task 3: Searching Mendeley and adding references
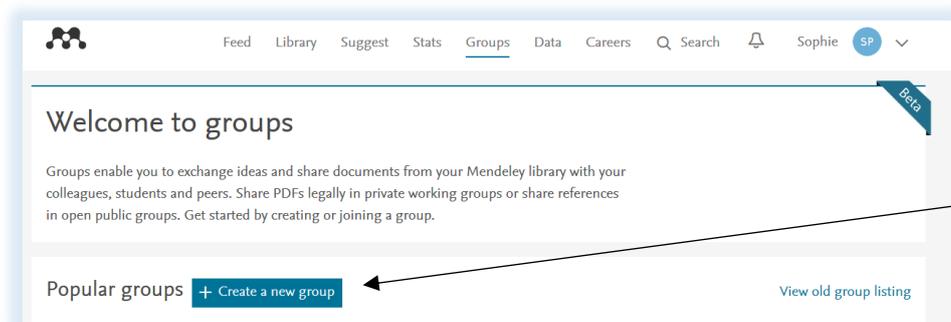
Things to try:

- Searching for an article in Mendeley's research catalog – Start from the Feed page and open the search box by clicking on the magnifying glass symbol (top right). Try searching for a paper on a topic of your choice. Add some references to your library.
- Try searching for groups with an interest in a particular topic. Add some of the group's references to your library.

Things to think about:

- In some cases you may have the option to add the PDF of a paper to your library. What issues might there be in having this feature available and sharing PDFs?
- From a search result for an individual paper, can you link through to the library of the person who added the article to see what else is in their library?

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3. Sharing references and groups

Web-based reference management software means researchers can easily share libraries for a joint project. This is usually achieved by setting up a group within the program and then inviting colleagues to join. In Mendeley you can start your own groups or join existing groups.
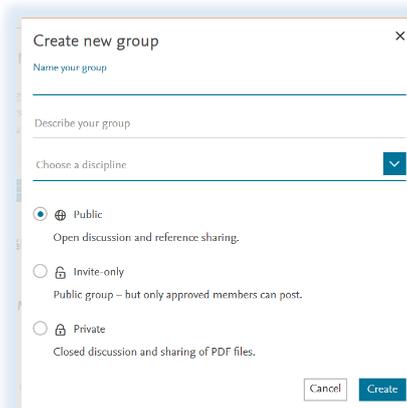
> You can create a group by going to the **Groups** tab and clicking on **Create a new group**

You can create three levels of groups:

- **Private** – create a private group allowing you to share full text PDFs and notes.
- **Invite only** – this group is publically available to view, but only invited members can join and share references. You cannot share full-text PDF files
- **Public** – anyone can join and share references

NB. With a free account you can create up to **five private or invite only groups**, with **a maximum of 25 members**. You can however, have as many Public groups as you like. Note that once you've made a group, you cannot change the level of group from Private to Public, and vice versa.
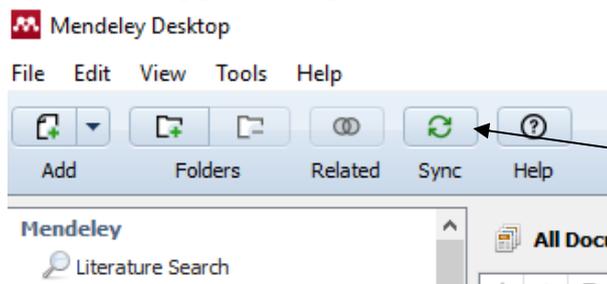
Mendeley Desktop

To open Mendeley Desktop on a Desktop@UCL PC, select Mendeley Desktop from the start menu

To install Mendeley Desktop on your own computer or laptop, go to: www.mendeley.com. Click on the arrow next to your account name (top right) and select **Download**. You can download Mendeley to a wide range of operating systems, including Mac and Linux.
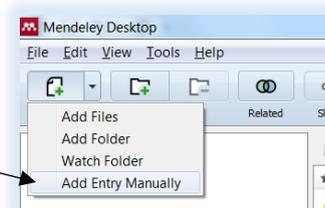
Synchronising your library

When you first go into Mendeley desktop it will automatically synchronise with the Web version and add any new references you have added. If you use the Web version whilst the desktop version is open, you can tell it to synchronise by clicking on the Sync icon.
If you make changes in your Desktop Library, it is important to remember to Sync your library so that any changes are fully saved.

4. Adding references to your desktop library

Manually adding references
You can add details of references manually by clicking on the **File** menu and then **Add entry manually**.

Adding a reference from Mendeley's research catalog
Use the 'Literature Search' option (left hand side of the screen) to search for articles in Mendeley's research catalog. Click on a reference to view full details in the right hand panel. From here you can link to the research catalog on the Web, or click on **Save Reference** to add it to your library.

Direct export from online databases
It is possible to export multiple references directly into Mendeley from some online bibliographic databases. This is very useful if you are working with large numbers of search results.

Database	Instructions
Explore	From the details screen for any result, select **RIS (Endnote OR Refman)**. This creates a **RIS** file. When prompted to select encoding, select US-ASCII. Click on **Download** and **Save**. **Open** the file using Mendeley. WARNING: not all fields may export correctly, ensure that you check and edit fields carefully. • If your file is not opening, from within Mendeley go to **File > Import > RIS** and navigate to the correct RIS file to import the references into your library.
OvidSP databases (e.g. Medline, Embase, PsycINFO)	• Select the references you wish to export and click on **Export** • In the **Export To** drop-down menu select **RIS** • Select the fields you wish to include and click on **Export Citations** **On a personal computer/laptop:** • Choose open and select **Mendeley Desktop** as the application with which to open the file • If you have other reference management software such as EndNote installed on your computer you may need to change the Default programme which opens RIS files or follow the steps for Desktop@UCL computers below. **On Desktop@UCL direct export isn't possible, but you can do the following:**

	• **Save** the file (remember the file name for the next step – it should save in your downloads folder). • In Mendeley Desktop go to **File > Import > RIS** and navigate to the correct RIS file to import the references into your library.
Scopus	• Select the references you wish to export and click on **Export** • Select **Mendeley.** Your references will be imported into your online Mendeley library. You will need to synchronise your library to see the references in Mendeley Desktop.
Web of Science Core Collection	• Ensure you are in Web of Science Core Collection (the other Web of Science databases cannot be directly exported into Mendeley). • Select the references you wish to export. • From the drop down list at the top of your search results, change the default export option from Save to Endnote online, to **Save to Other File Formats.** • Select the fields you wish to include, change the File Format to **BibTeX** and click Send. **On a personal computer/laptop:** • Choose open and select **Mendeley Desktop** as the application with which to open the file. If this doesn't work then follow the instructions as per those for OvidSP when using Desktop@UCL computers: • Save the Bib file and remember its location. • In Mendeley Desktop go to **File > Import >BibTex** and navigate to the correct Bib file to import the references into your library.
PubMed	• Select the references to export • Select **Send to** then choose the destination **Citation manager** and click on **Create file.** • **Save the .nbib file** (it may save to your downloads folder). • In Mendeley Desktop go to **File > Import >BibTex** and navigate to the where the PubMed .nbib file was saved. • Change the file type from BibTex to **All supported formats.** This will allow you to locate the .nbib file. • Open the .nbib file.

> ## Task 4: Exporting references
> • Try exporting references from OvidSP databases or Scopus into Mendeley.

Adding references from another reference management package
The desktop version of Mendeley allows you to import files saved from EndNote, Reference Manager, Zotero or BibTeX. To import your references from the other package in the appropriate format, from within Mendeley go to the **File** menu, then **Import** and select the appropriate option.

Adding PDF documents
If you have PDFs saved which you want to add to the library, Mendeley Desktop can create a bibliographic record from the PDF. There are three ways to add the PDFs to your library:
1. **Drag and drop** - Open up the folder where you have saved your PDFs and display it so you can see your Mendeley Desktop library behind it. Click on one of the PDFs and drag it into the references pane of your library.
2. **Add files** – Click on the arrow next to **Add** on the top left of the screen, select **Add Files** and navigate to the folder where the PDF is stored. Select a PDF and click on Open.
3. **Watched folder** – Mendeley Desktop will automatically import all files that you save to a particular folder on your computer. To set this up, go to the **File** menu and select **Watch folder.**

NB. Bibliographic details may not always import correctly. If Mendeley is uncertain about the details of an article it will add the article to the **Needs Review** collection. When you view this article, you have the choice to confirm the details are correct (you can manually edit them first) or search for the article details in the Mendeley catalog (you need to

ensure the correct title is entered in the title field), or other databases (enter the DOI or PubMed ID in the appropriate field under 'Catalog IDs' and click on the look-up tool).

Tips:
- You can highlight text in a PDF or add a note. From the **Details** tab on the right, scroll down and select the PDF from the **Files** field
- To make the PDFs available to view in Mendeley Web you will need to **Sync** your library.

Mendeley is set up by default to sync attachments. You can see available options by clicking on the **Edit Settings** button directly above the list of documents.

Task 5: Adding PDF documents

Things to try:
- Try downloading some PDF documents from the Web to your desktop and then try adding them to your Mendeley library. Try out the different methods for getting a PDF into Mendeley.
- Try annotating a PDF, or highlighting some of the text.
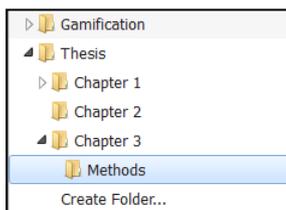
Things to think about:
- Which method do you prefer for adding PDFs to your Mendeley library?
- Did Mendeley manage to find the correct details to create a record in your library?

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5. Tagging and organising references in folders

Tagging is a popular way of adding labels to items – this helps describe the content but could also be used to identify the source or intended purpose of particular items (e.g. 'Web of Science' or 'Prof. Young's assignment').

You can add descriptive tags to records you've added to your library from within the Desktop version of Mendeley by editing the **Tags** field in the record from the **Details** tab. You can add tags in the same way in the web version of the library too.

To search your library for articles with a particular tag, simply choose to **Filter by My Tags** in the left hand drop-down menu, and select the appropriate tag.

Another way to organise references is to put them into **Folders**, rather like organising your files in My Computer or your emails.

You can 'drag and drop' references from 'All Documents' into a folder. The reference will also remain in 'All Documents' – if you remove a reference from a folder, the reference can still be found under 'All Documents.' Please do not 'drag and drop' your reference/s to Trash if you want to remove them from a folder as this will delete the reference/s also from your 'All Documents'. Right click on your reference/s and select '**Remove from Folder**' instead.

You can build multiple levels of folders in a hierarchical structure.

Task 6: Organising references

Things to try:
- Create a folder and some sub folders, move some articles into your sub folders.
- Add a couple of descriptive tags to records you've added to your Mendeley library (Hint: Multiple tags can be entered separated by a semi-colon. Select multiple references (Ctrl or Shift key + click) to tag more than one with the same tag)
- Search your library for articles with a particular tag

Removing duplicates

To keep your references organised, it's important to ensure you have removed any duplicate references. If metadata (the details of the reference) are exactly the same, Mendeley should merge the records. However, if some references make it into your library have minor differences, Mendeley will not automatically merge them. For these cases, you can use the Mendeley Desktop deduplication tool.

To use the tool, begin by selecting '**All Documents**' (towards the top of the left hand panel). Click on the **Tools** menu and select **Check for duplicates.** Sets of duplicates will then be shown. Each set shows what your duplicate documents will look like once merged. You can double click a set to expand it and view each duplicate document individually. Using the checkboxes next to the document details in the right-hand panel you can select the details that you would like to keep from each of the documents. Click **merge** to keep one merged entry in your library containing the complete document details. For more information please visit Mendeley Support Centre via the following link:
https://service.elsevier.com/app/answers/detail/a_id/19611/kw/duplicates/supporthub/mendeley/

6. Citing references and creating a bibliography

You can use Mendeley to insert references into a Word document, generate a bibliography at the end of your document and format it in the citation style of your choice. When you install Mendeley Desktop on your computer a **Mendeley Cite-O-Matic** toolbar appears within the **References** tab in Word. If it is not there, go to the **Tools** menu in Mendeley desktop to install the MS Word plugin. Note that you must use Mendeley Desktop to use the Mendeley Cite-O-Matic – it will not function with Mendeley Web.
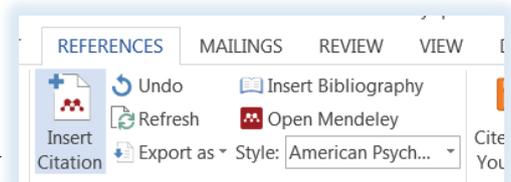
Inserting a citation into a Word document

Open the Word document that you wish to work in. Click on the **References** tab. You should see the Mendeley Plugin within your toolbar. If you see a yellow Security warning which says **Macros have been Disabled** at the top of your Word document then you will need to click on **Enable content** to get the Cite-O-Matic to work.

There are two main ways to add citations from Mendeley to your Word document.

Method 1: Searching for the reference you would like to cite.

Step 1. Place your cursor where you want your citation to appear in your Word document and click on **Insert Citation**
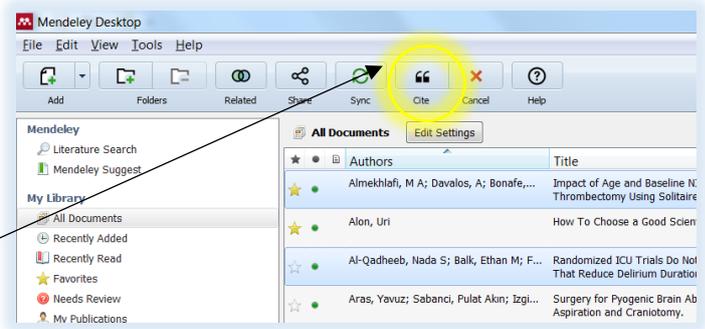

Step 2. A search box appears. Search for the reference in your Mendeley database that you would like to cite, select it and click OK. The citation will then be added to your Word

Method 2: Choosing the reference you would like to cite from within Mendeley
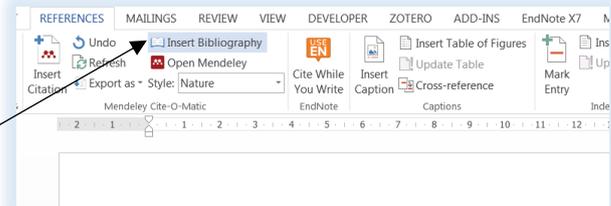
Step 1. Place your cursor where you want your citation to appear in your Word document and click on **Insert Citation**

Step 2. Click on **Go To Mendeley** and from within your Mendeley Library, choose the reference or references that you would like to cite. Click on the **Cite** icon.

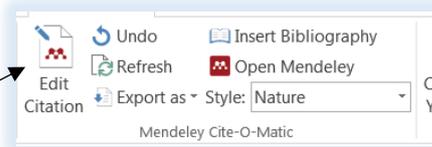## Inserting a reference list or bibliography

Once you have added some citations to your document you can create a reference list based on them. Place your cursor at the end of your document where you would like your reference list to start and click on **Insert Bibliography**.
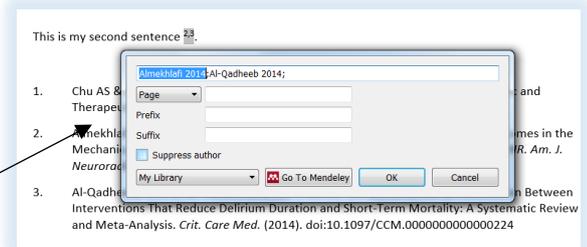

Editing citations

In some situations you may want to edit a citation you've already added, either to correct a reference or to add more detail - such as a specific page number. To do this, **begin by clicking on an existing citation –** it will be highlighted in grey once you click on it.

The 'insert citation' button will change to read **'Edit Citation'**

When this button is pressed the Citation Editor will open. **Click on the existing reference** to edit the citation and then click OK to return to your document.

Task 7: Cite references and creating a bibliography
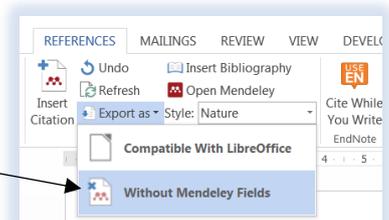
Things to try:

- Try inserting some references from your Mendeley desktop library into a Word document.
- Try creating a bibliography at the end of your document.
- Try changing the output style from an author/date style, e.g. Harvard, to a numeric style, e.g. Vancouver.
- Try editing a reference to include a page number.

Finishing up

Before submitting a paper, publishers and plagiarism detection software such as Turnitin usually require that you remove the fields of code that Mendeley uses to connect your cited references to your Mendeley Library. As well as a requirement for submission, this also allows you to make small edits to your references in Word if required (useful if your output style meant a reference wasn't displaying as needed). This process is **not reversible** so make sure you save the version without the field codes as a new document. Keep a copy of your original document with the field codes in case you need to go back and make further edits.

To save a copy of your Word document without Mendeley field codes, click on **Export as** from within the Mendeley Cite-o-matic, and select **Without Mendeley Fields**

7. Mendeley on the go

There is a Mendeley app for iPhone / iPad / iPod touch, as well as Mendeley for Android devices (available from Google Play) which allow you to access your library from anywhere, including reading and annotating PDFs offline.

8. Further information on Mendeley

- http://support.mendeley.com Guidance and FAQs on using Mendeley
- http://blog.mendeley.com Mendeley blog – useful for information and updates
- https://twitter.com/MendeleySupport Mendeley Support (Twitter) useful for service updates