

What is Mendeley?

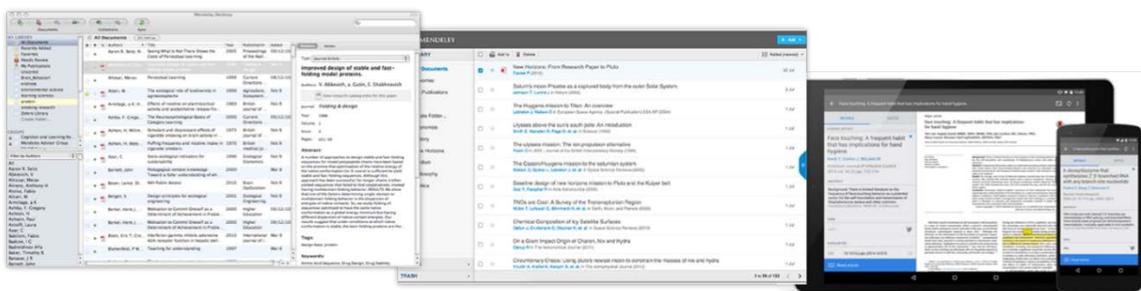
Mendeley is freemium software which is available across a number of different platforms. You can run Mendeley on your computer or laptop, as an app on your phone or tablet, and also access it from your web browser. Mendeley's Desktop application allows you to organise, collaborate and discover, as well as use the citation plugin to cite as you write in Microsoft Word or LibreOffice. While the web and mobile apps offer you the ability to access your references on the go, as well as making notes and annotations.

Mendeley acts as a repository for your reference information. You add papers to your library by importing PDF files stored on your computer, or by retrieving them from other locations like Library databases such as EBSCO, ScienceDirect, Pubmed or PLOS. You can also create entries for items that you don't have access to as PDFs by manually entering details. Materials you add to your library are then stored in the cloud, for you to retrieve wherever you need them. It might be that you want to add a paper to your Library while using the campus Wi-Fi, and then cite it while writing your paper at home later that day. Mendeley allows you to retrieve the same resources with the same enhancements and annotations wherever you need them.

Getting Started

The first thing you'll need to do is to create an account via <http://mendeley.com>. This is free to do and only takes a few seconds.

Mendeley Desktop



You'll need a Mendeley account to log into the different versions of the software. Once you've created your account you'll be prompted to download the appropriate version of Mendeley Desktop for your current machine. You don't have to do this right away, but it's a good idea to have the desktop application installed on your main working computer.

Mendeley Desktop uses a three column structure. The left-hand panel allows you to navigate through different filtering options for your library. When you click on different folders or groups listed in this column, different lists of papers will be returned in the main panel. In this screenshot we have 'All Documents' selected, which means the main panel is listing all of our references.

Mendeley Desktop

When you first open Mendeley Desktop, you'll need to log into your Mendeley account. This ensures that any changes you make are being made to your own account and will be carried across when you log into different devices.

The middle panel allows you to select individual references. Clicking on a reference listed here will display this document's details in the right-hand panel. You can also select multiple papers to undertake bulk actions, such as mass deletions or additions to folders.

The right panel shows the details of your selected reference. You can also use this panel to modify the details by clicking into the individual fields. You should carefully check and correct the details displayed in this panel as ensuring accuracy here will ensure that your citations are totally correct.

Mendeley Web is the version of Mendeley accessible via your web browser. You'll need to be logged into your Mendeley account in order to access it. The layout is similar to Mendeley Desktop (the same three-column setup) although it has been optimized for use in a browser.

References and Documents

Mendeley deals in both documents and references. It will take a document - in the form of a PDF paper - and attempt to extract the reference information in order to produce a reference. It does this by looking at the contents of the paper, and by examining any included metadata. You can then check and modify this reference data to ensure that Mendeley has produced the correct details. Ensuring you have correct reference details is very important!

Document versus Reference

In Mendeley, a document means an actual file, usually a PDF version of a research paper, while a reference is the simple information needed to cite a document.

It's also important to realise that you can have a reference without providing a document. If you know the details of a publication (such as the author, title etc.) you can still add it to your library and cite it - even if you don't have access to a PDF version.

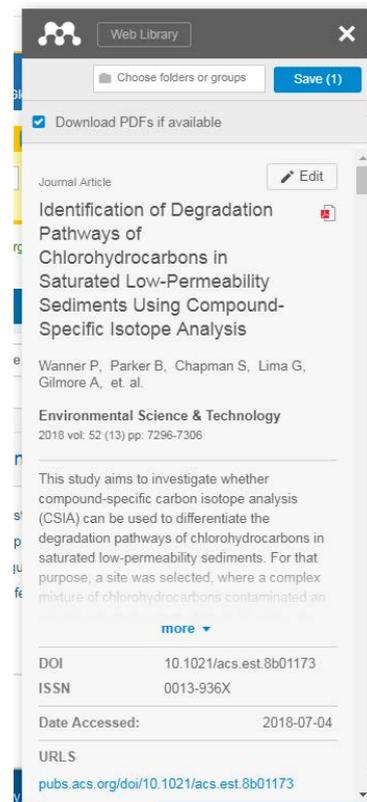
This can be useful if you're citing a book that you use in hard copy, for example.

Adding Documents and References

Mendeley also offers a number of other options for adding material to your library. You can find these by opening the File menu. You can choose to add individual files, or the contents of an entire folder by browsing to the relevant location on your computer. You can opt to 'watch' a folder - which will mean that Mendeley monitors that location for any new items being dropped into the folder. If it finds a new document, that document will be automatically added to your Mendeley library. You also have the option to create a reference manually - which will allow you to complete a number of fields by hand.

You can also easily import or export your library to and from other reference managers. So if you would like to switch between Mendeley to Endnote, to Zotero, to RefWorks for example, you can do so easily. The Web Importer is available as a bookmarklet, and as a browser extension. In both cases, they will detect references on the page you're viewing and ask if you want to add them to your library. You can also use them to add web pages to your library.

Mendeley also operates a database of publications sourced from records created by its users. This allows you to search the online and identify references you want to add to your library with just a few clicks. Other catalogues will allow you to export in file formats such as RIS, which can then be added to Mendeley using the File menu.



Saving it is easy!

Certain online catalogues, such as ScienceDirect allow you to export references directly to Mendeley. Look out for the *Export* button on pages like this.

You may find that after collecting a library of references over time that you have accumulated some duplicate entries where two or more copies of the same reference or document exist. Fortunately fixing this is easy. Use 'Check for Duplicates' found in the Tools menu to identify any duplicate entries and merge

them into a single, combined entry.

Manage your Library

Mendeley Desktop's interface should be fairly intuitive if you're familiar with programs like iTunes, or even Gmail. The left-hand panel offers a number of different options to help filter your document list to exactly what you need to find.

The default position when opening Mendeley Desktop is 'All Documents,' which will list all items in your library. You can use the column headings (such as Author Names, Year, etc.) to order your documents by that value which can be useful for finding works by a specific author, for example.

Sync

Because your Mendeley account works on different devices, whenever you make changes to your Library, you'll need to sync in order to push those changes up into cloud storage. It's a good idea to sync regularly to ensure that your documents and annotations are saved.

recently added, or items you've recently read.

Another way to manage and organise your Library is to use tags and notes. You can add multiple tags to your references using the document detail panel when you have the reference selected. Then it is a simple matter of using the Filter by My Tags menu which appears in the bottom left corner to quickly pull up materials that you've tagged.

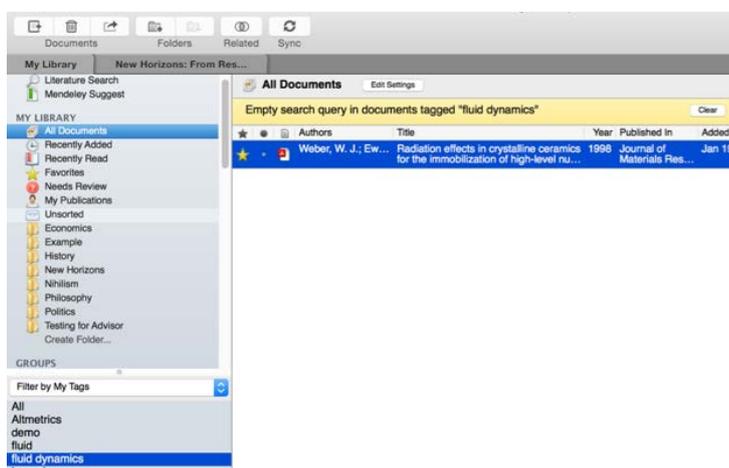
Folders and subfolders allow you to quickly file your references under different topic headings. You can drag and drop references from your library onto the folder name in the left panel to add that reference to a folder.

To find items in your Library just enter your search term in the field which appears in the top right corner and Mendeley will filter your current view to show references which contain that term. It will also search within

the full text of PDF papers which appear in your library. The search is context specific, so if you're not getting the results you expect make sure that you have the appropriate folder selected in the left-hand panel. If in doubt, select 'All Documents'. Use the 'clear' button which appears on the yellow toolbar to remove the search filter.

Mendeley can also search your library for similar documents and references. Simply select the reference you want to use and click on 'Related' to see a list of recommended results.

When you add materials to your library, they will initially be marked as unread, indicated by a large green dot in the second column. You can toggle this off and on by clicking it. Alternatively, a document will be marked as read once you've spent a certain amount of time reading it in the Mendeley PDF reader. You can 'star' documents to mark them as favourites. They can then be easily retrieved via the left-hand panel. You can also use the left-hand panel to access items you've



PDF Viewer and Tools

The Reader's layout will be familiar if you've used Adobe Acrobat or similar software. Clicking on the PDF icon next to a document opens it up in a new tab. Mendeley will remember where you were up to in a paper when you open it and take you back to the same place. At the top of the screen you'll see a number of tools, which are mostly self-explanatory.

You can also add notes to the paper to help organize your thoughts. These can be done either in the Notes box which appears in the document detail panels, or you can add 'sticky notes' to a particular passage in the document. Notes in the Notes box are document-wide and can also be viewed from the main library view - without opening the paper for reading. While Sticky notes that are added in this way will appear in the list of annotations in the document details panel. You can use these entries to jump to the appropriate location within the paper.

Citation Plugin

To use the plugin first position your cursor where you want the citation to appear and then click on the 'Insert Citation' button which appears under the Reference tab. You also need to be running Mendeley Desktop, and will be prompted to start it if it is not currently running.

Pressing the button will open the Mendeley search tool. This box allows you to enter a term, such as an author name, before returning search results from your library. Locate the reference you want to cite, click to select it and press the Ok button. You will see that the citation is added. Its appearance will vary depending on which citation style you currently have active at the time.

Installing the Plugin

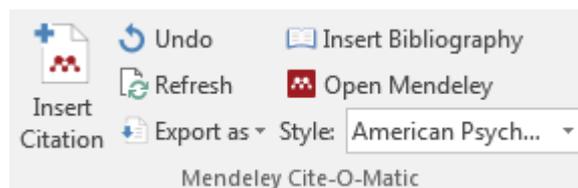
To install the citation plugin, select 'Install MS Word Plugin' from the Tools menu within Mendeley Desktop. Once installed, the citation plugin will appear within Microsoft Word under the References tab.

If you're looking for a particular citation and can't remember its details you can also opt to switch to Mendeley desktop to locate it using search or filtering by tags, for example. Just press the 'Go to Mendeley' button to switch over to that interface. Once you've located the appropriate reference, click to highlight it and press the 'Cite' button which temporarily appears on the Mendeley Desktop toolbar. If you want to cancel the citing process and return to your manuscript press the cancel button.

Note that your document is considered 'locked' while this process is active. You need to cancel the citation to return to the document, or insert a citation before you can switch back to writing your assignment.

Highlighting Text

You can highlight important passages using the Highlight tool just as you would when reading a photocopy. This allows you to pick out important passages from a paper.



Once you've done adding citations you'll need to generate a bibliography. Ensure your cursor is positioned where you want your bibliography to appear and press the 'Insert Bibliography' button - it just takes one click! All the references used as part of your work will now appear as a list. They will be ordered depending on whichever citation style you have chosen to use.

Citation Styles

Citation Styles determine how your references appear, both in the text of your work, and in the bibliography. Different disciplines will use different styles. In Mendeley you change the citation style very easily. To do so, open the styles dropdown menu which appears on the Mendeley toolbar.

If you still can't find the right style or you'd like to customize an existing style, you may want to try the Mendeley CSL Editor, which allows you to customise citation styles. You can also share created styles with other Mendeley users. The editor can be found at <http://csl.mendeley.com>

Over 1,600 citation styles

If you don't see the style you need, you can click 'More Styles' to be taken to the Styles tool within Mendeley Desktop. This will also allow you select from over 1,600 different styles; including the most commonly used such as APA, IEEE, OSCOLA etc.

Create or Join Groups

If you are interested in sharing your Library with others, for a group assignment for example, then using Mendeley's Group function might be useful. Any groups that you are a part of will be listed in the left panel of Mendeley Desktop, underneath your personal folders. To add materials to a group, just drag and drop them onto the group name. Because Mendeley is a freemium service, users with a free account will only be able to add three people to their groups. If you would like to add more people to your group you will unfortunately need to pay for a 'Team Plan.' Mendeley has a community of public groups devoted to all kinds of disciplines. You can browse for groups in your subject and join or follow them in order to keep up to date and make contacts.

You can create new groups at any time by using the 'Create Group...' option. Mendeley offers three different types of group:

Open: these groups are publicly visible and accessible to anyone. They will be listed in the groups' directory on Mendeley's website. Members can add references to the group but only the reference details will be added.

Invite-only: these groups are publicly visible, but membership is controlled by the group admins. Anyone can 'follow' the group to access the references, but only full members can add or edit references.

Private: these groups are not publicly visible. Members need to be invited. Members can share full-text papers with each other, and can also collaboratively highlight and annotate on these materials. Each contributor will be assigned a colour to help distinguish their changes.

Create your Research Profile

You can use Mendeley to share your work with other users by adding your publications to your personal profile. You can add all kinds of publications; working papers, poster presentations, journal articles etc. Adding publications will make them available to other users via your profile, as well as connecting you to them in the Mendeley Web Catalogue. If other users view your paper in the Catalogue, they will see that you are a Mendeley user and will be able to connect with you. To add your personal publications, open 'My publications' in Mendeley Desktop, and either drag and drop a file onto the specified area, or click to browse to a file on your computer.

Share Your Interests

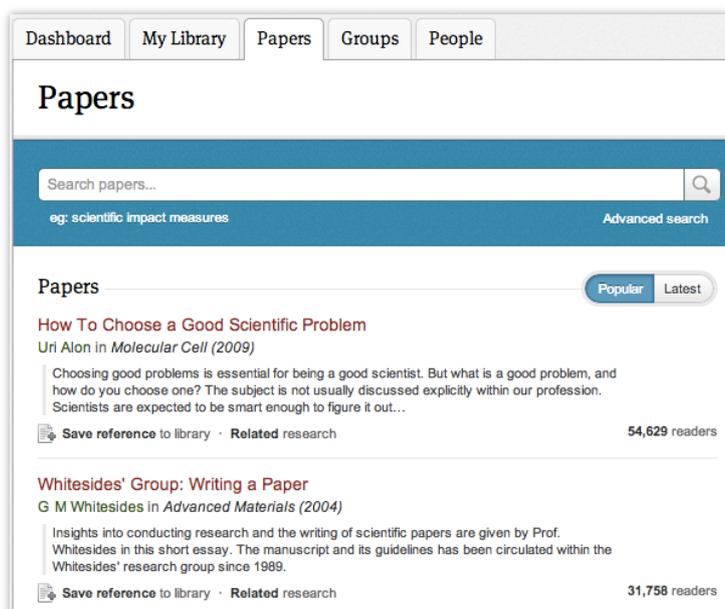
Completing your profile is a great way to promote yourself and to encourage other users to get in touch. You can use your profile to share as little or as much of your information as you like.

Literature Search

If you know the name of a paper or if you have a specific topic in mind, you can use the Literature Search setting from within Mendeley Desktop. As the Catalogue is crowd-sourced, the Literature Search can only retrieve papers that have already been added by other users. So if the article you want is very new or obscure, it might not show up.

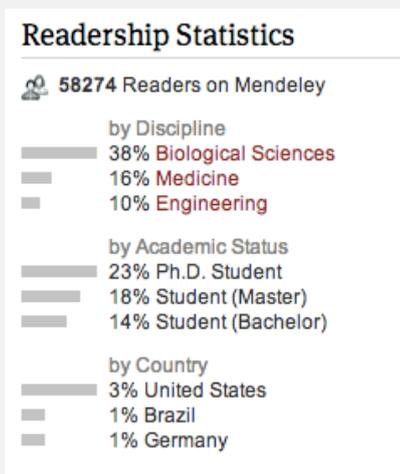
If the full text of a paper is available (when the paper is Open Access for example) you'll see an icon allowing you to download it. You can also search the catalogue online via mendeley.com's Papers tab. If you're logged into your Mendeley account, you'll be able to save the resulting references straight to your library.

When viewing a web catalogue entry, you'll see the option to add the reference to your library with just a single click. If the paper is freely available (again, open access is a good example) you'll also be able to download the full paper. For other references, you can use the 'Find this paper at' dropdown menu to view different options. Using Open URL will allow you to retrieve a paper through your institutional access, providing your institution has the appropriate subscription.



Who else is reading this?

A Web Catalogue entry will also include readership statistics drawn from Mendeley. You can see the number of people who have read the paper, as well as a breakdown of their discipline background.



When viewing a paper in the Web Catalogue, you'll also be given a list of papers that are related to it. These relationships are determined by the behaviour of other Mendeley users, so if a paper is commonly used in conjunction with the item you're viewing, it will be recommended to you.

Finally, from within Mendeley Desktop you can select multiple papers within your library, and right click to be given a list of papers connected with the items you selected. This can allow you to discover new resources connected to a set of materials and can be handy for finding niche topics or interests.

Where to From Here?

You can contact the Library for help with Mendeley at any time. You can click on the 'Help' icon at any time to access Mendeley's 'Getting Started' guides and for links to online help guides. From here you will find a selection of detailed guides for each of the different versions, as well as feature guides and video tutorials that cover specific components.

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Reference Management: Home

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What is reference management

Research Cycle

Discover

Compare software

Reference management is the act of organising references and generating reference lists or bibliographies in a variety of styles e.g. for a thesis, or for journal or book publishing. Many researchers now use software to do this – this can store both the reference and the PDF of the paper you are reading. Edinburgh Napier offers training & support with Endnote and Mendeley reference management software - use the one which suits your needs best, or choose another [reference manager](#).

The Library Guide to Reference Management, located at <https://libguides.napier.ac.uk/refman>, has more information and top tips for using Mendeley at Edinburgh Napier University, as well as other reference management systems and dates of our regular training workshops.