Library Services

Using Mendeley: a quick guide

This is a quick guide to Mendeley. There are many other functions and options available which are not included here. For more information go to https://www.mendeley.com/guides

What is Mendeley?

Mendeley is a bibliographic software package which allows you to:

- Import references from databases
- Import saved PDFs to create references
- Add correctly formatted citations to Word documents
- Build a bibliography
- Share references with a defined group
- Annotate PDFs

How do I register?

Mendeley offers a free and a premium version. For most users the free version provides adequate storage and functionality.

To register go to https://www.mendeley.com/.

Mendeley has a web and a desktop interface; to access all the functions of Mendeley you will need to use both.

PCs in the Library and PC clusters in College have Mendeley desktop installed.

To download Mendeley desktop onto your own machine click on the **Download** button and follow the installation instructions.

How do I add references to my account?

There are various way to do this:

1. Import using the web importer bookmarklet
2. Import using the "export" or "download" button from databases
3. Import saved PDFs to generate references
4. Search for an article from within Mendeley Desktop
5. Add references manually
6. Save references in a text file

1. Import references using the web importer bookmarklet

The Mendeley bookmarklet allows you to import references from a range of resources including academic databases, Google Scholar and webpages.

To install the bookmarklet in your browser:
From Mendeley desktop:

- Go to the **Tools** menu and select **Install Web Importer**
- The Web importer webpage will now open. Follow the instructions to
- install the Web importer

From Mendeley web interface:

- Download the web importer from their Downloads page or navigate to the "Downloads" expanding the menu from your profile icon.
- Select your operating system and follow the instructions to install the Web Importer.

To import references into Mendeley:

If you have the web Importer:
- Conduct a search in your chosen resource
- From the **Results** screen click on **Save to Mendeley** in your toolbar
- A box will appear containing a summary of all the references on the screen
- Select the ones you want to import by clicking on the plus symbol or choose **Save All**
- To view these references in Mendeley desktop hit the **Sync** button
- To view in Mendeley web you may need to refresh your browser

2. Import saved PDFs to create references

If you have saved PDFs of journal articles you can drag and drop files, or folders into Mendeley desktop. Articles will need to have a DOI in order for this function to work. This will generate a reference for the article and save a copy of the PDF in your Mendeley library which you can annotate.

You can also set up a 'Watched Folder' in Mendeley desktop by going to the **Tools** menu and selecting **Options**. Any new PDFs saved in this folder will automatically be imported into your Mendeley library.

3. Search for an article in Mendeley community

Mendeley has a strong social element, you can search for journal articles deposited by other researchers and import selected references into your Mendeley library. Please note, this applies to the citation data and not guarantee download of PDFs.

You can search the Mendeley collection from Mendeley web by clicking on the **Search** tab, or by selecting **Literature Search** in the navigation bar in Mendeley desktop.

4. Add references manually

- To add references manually click on the **Add/Add Files** button

- Select **Add Entry Manually** and a blank reference template will appear

- Use the drop down menu to select the type of material you wish to reference, e.g. journal article

- Complete all the required fields and hit the **Save** button

Note that author names should be entered as **Last Name, First Name**. e.g. Smith, John.

5. Save references in a text file

If you are searching a resource which is not compatible with the web importer you can save your references in a text file and import into Mendeley.

- Conduct a search in your chosen resource

- On the **Results** screen select the references you want to export

- Look for a Save/Export citations button

- Save the references in .RIS format

- In Mendeley click on the **Add/Add Files** button and select **Add Files**

- Navigate to your saved file and hit the **Open** button

- The saved references will now be imported into your Mendeley library

Note: this is a the most reliable way of importing references.

How do I organise and search my references?

You can organise your references by creating folders and adding tags to references.

Creating folders:
- Click on **Create folder** in the side navigation
- Drag and drop the references you want to add onto the folder name

Adding tags:
- To add a tag click on the reference to open it
- Type your text into the Tag field (In Mendeley web you will need to select the **Edit** button first)
- Multiple tags can be entered if separated by a semi-colon

How can I annotate PDFs?

References with PDFs attached will have an icon next to them. Open the PDF by clicking on the icon.

There are options to highlight sections of text and add brief sticky notes. More detailed notes can be added in Mendeley desktop in the Notes tab of the PDF viewer side navigation, which are searchable. You can also share PDFs and annotations within a group.

How do I share references with other people?

With Mendeley you can set up or join groups which allow you to share references and collaborate more easily.

Go to https://www.mendeley.com/guides/groups for more information.

How do I create a reference list/bibliography?

Mendeley can take the references in your library and insert them as citations in your Word document and generate a reference list in a variety of referencing styles.

Mendeley **Cite-O-Matic** will be installed in the **References** tab in Word ribbon when you download Mendeley desktop. If you are using a College PC and do not see Cite-O-Matic you may need to open Mendeley desktop and go to the **Tools** menu and select **Install MS Word plug in**.

In Word:

- Please your cursor where you want a citation to appear

- Click on **Insert Citation** in Cite-O-Matic

- Enter details about the reference you want in the search box, select the correct reference from the list provided and hit the **OK** button *or* click on the **Go to Mendeley** button to select the reference and click the **Cite** button

- Once you've entered a citation you can select the referencing style you wish to use in Cite-O-Matic

- If your style is not listed select **More Styles**. This will take you into Mendeley desktop where you can search for your style from the **Installed** or **Get more styles** tabs

- Select the style you want and click on **Use this style** and **Done.** Your selected style will now be available in the **Styles** list in Word

- When you've finished adding citations, place your cursor where you'd like your reference list to appear and click on **Insert Bibliography**. This will generate a reference list in your selected style

How do I create a profile in Mendeley?

In Mendeley web you can create a profile which details your areas of interest. You can also upload your own publications to Mendeley to allow other researchers to access them. Please check the publisher's copyright policies before doing this.

In Mendeley web click on your name in the top corner and select **Edit**. You can also amend your privacy settings at any time by selecting the **Privacy** option from drop down menu next to your name.

How do I get help with Mendeley?

Online guides and videos are available at
https://www.mendeley.com/guides

Contact your Liaison Librarian at http://www.imperial.ac.uk/admin-services/library/subject-support/