

Getting started with Mendeley

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www.mendeley.com

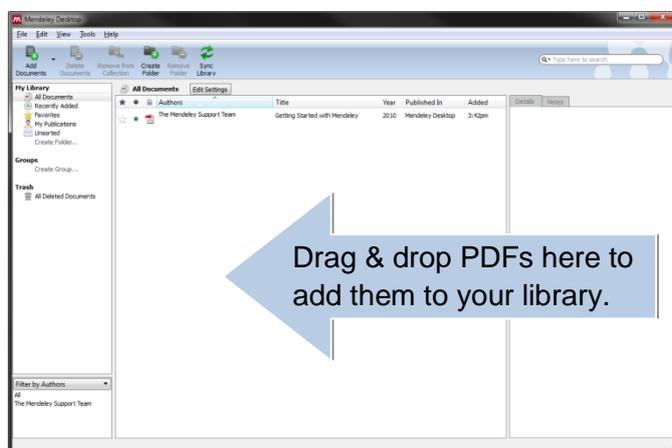
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1. Creating your library

Add PDFs to Mendeley

You can add PDFs to Mendeley by clicking the **Add Document** button on the far left of the toolbar. Alternatively, you can **drag and drop** PDFs into the content pane. Mendeley will then attempt to detect the document details (bibliographic data).

Any documents whose details Mendeley is uncertain about will be added to the **Needs Review** section for manual verification. You may use Mendeley's [Document details lookup](#) (CrossRef, PubMed, and ArXiv) or [Google Scholar Search](#) to complete missing document details (see below).



Import/export EndNote™, BibTeX and RIS libraries

Switching from other reference management software such as EndNote™ to Mendeley is simple. As EndNote™ uses their own proprietary file extension (.enl) you will need to export your library as .xml file (the more open common standard) in order to migrate to Mendeley:

In EndNote™:

1. Select File ➡ Export
2. Choose “XML” type and “RIS” as output style
3. Give your library a name and save it on your PC

Then in Mendeley:

1. Select File ➡ Add Files
2. Choose the XML file that you have previously exported from EndNote™ and click on “Open”
3. Your EndNote™ library will appear in Mendeley Desktop

To **import** BibTeX and RIS XML alongside PDFs choose:

File ➡ Add Files

Likewise your data can easily be **exported** from Mendeley:

1. Select the documents you would like to export and go to File ➡ Export or press Ctrl + E or Cmd + E on MacOS.
2. You will then be given the option to save your files in the most common formats - .xml, .ris, and BibTeX files.

Document details lookup (CrossRef, PubMed, and ArXiv)

You can also lookup document details from CrossRef (DOI), PubMed (PMID), and ArXiv. Just fill in the document ID in the respective field and click the magnifying glass icon next to it to get the details for those documents. These fields are located in the **Details** tab.

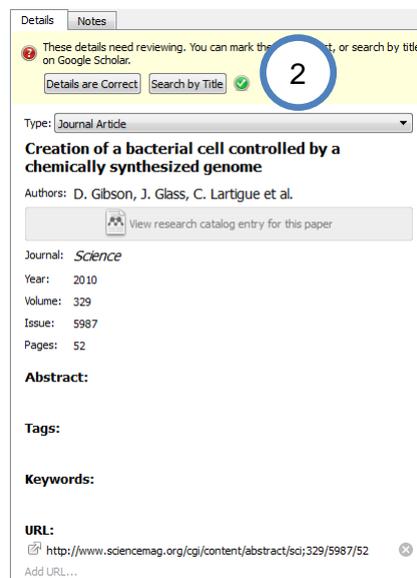
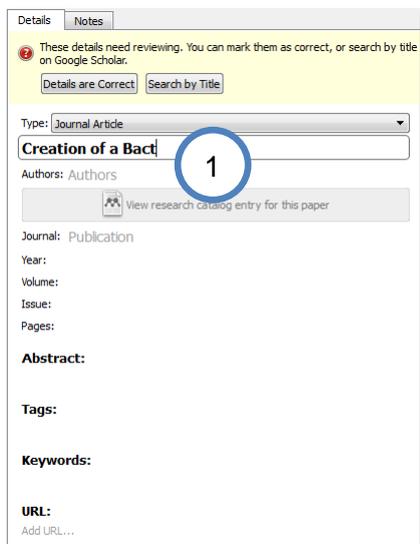


Google Scholar Search

You can lookup document details with Google Scholar in Mendely:

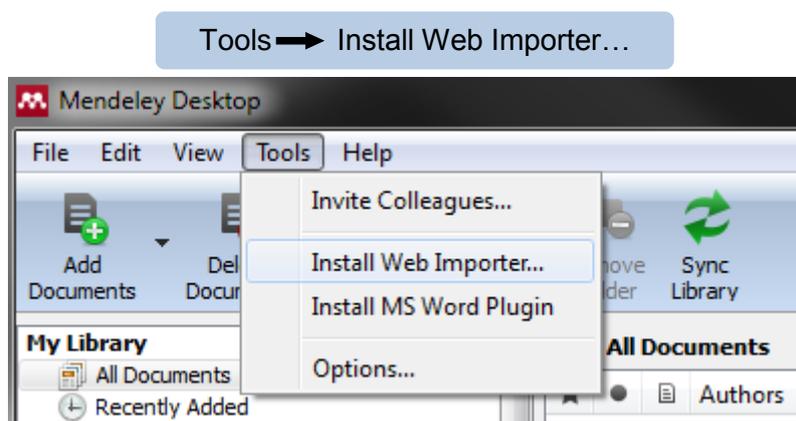
1. **Input the correct document title**
2. **Click search**

Mendely will try to complete the missing data from Google Scholar. (Note: The lookup works only for imported PDF files and not for manually added entries.)



One-click Web Importer

You can import references with a single click from the services listed below. To install the **Web Importer** and to find out how to use it, just select:

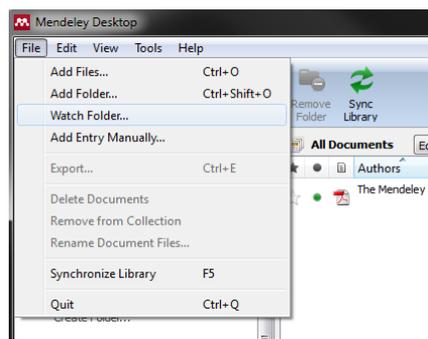


- ACM Portal
- ACS Publications
- AIP Scitation
- Amazon
- APS
- APA PsycNET
- arXiv
- BioMedCentral
- BioOne
- CiteseerX
- CiteULike
- Copac
- DBLP
- EBSCO
- GBV
- Google BookSearch
- Google Scholar
- IACR ePrints
- IEEE Xplore
- Informaworld
- IngentaConnect
- INIST/CNRSI
- Institute of Physics
- ISI Web of Knowledge
- JSTOR
- Lancet Journals
- MyOpenArchive
- NASA ADS
- Nature
- OpticsInfoBase
- PLoS
- PNAS
- PubMed
- RePEc
- SAGE
- ScienceDirect
- ScienceMag
- Scirus
- Spires
- SpringerLink
- SSRN
- Wikipedia
- Wiley InterScience
- WorldCat
- Zetoc

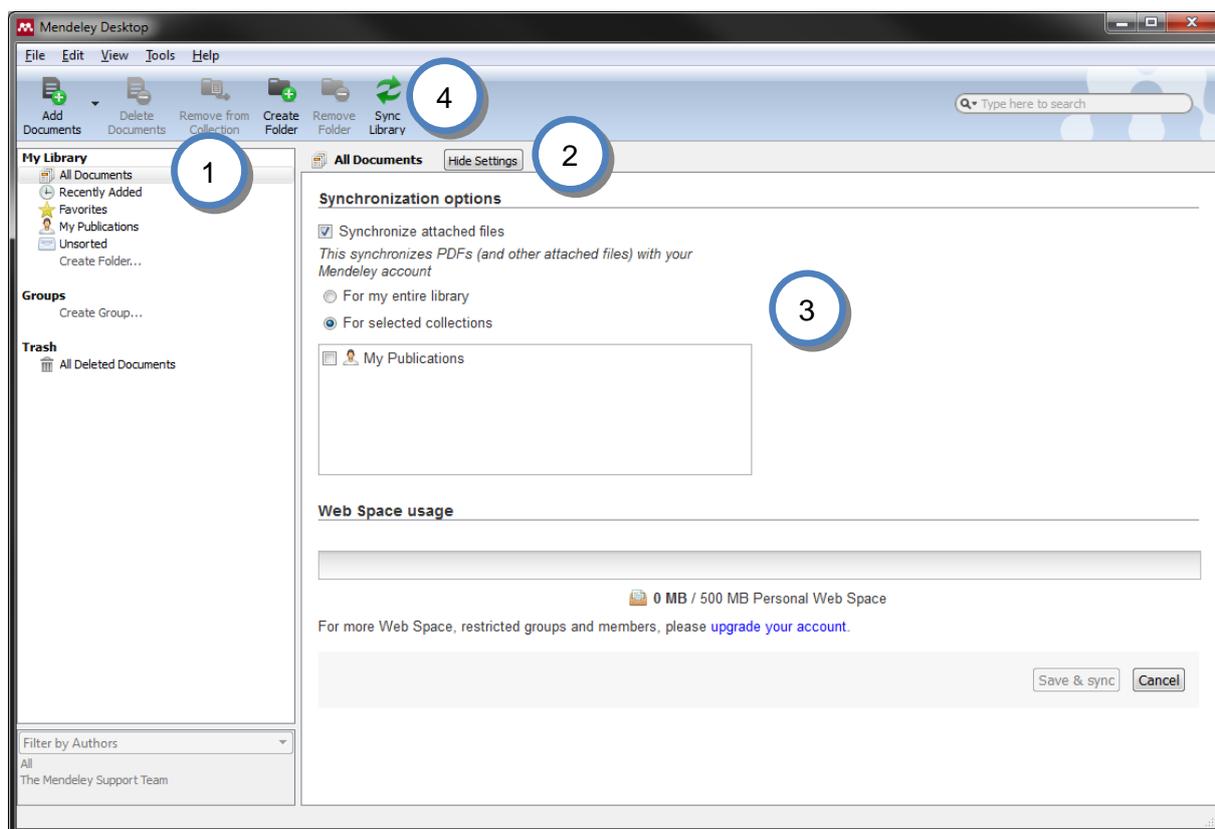
... and growing.

Watch folders to automatically add PDFs to Mendeley Desktop

When you place a document in a watched folder, it will be automatically added to Mendeley so you can annotate, cite, and browse its references instantly. Adding files to Mendeley using watched folders makes it easier to add multiple papers in one go and keep them where you want on your computer.



Synchronize PDFs with your Mendeley Web account



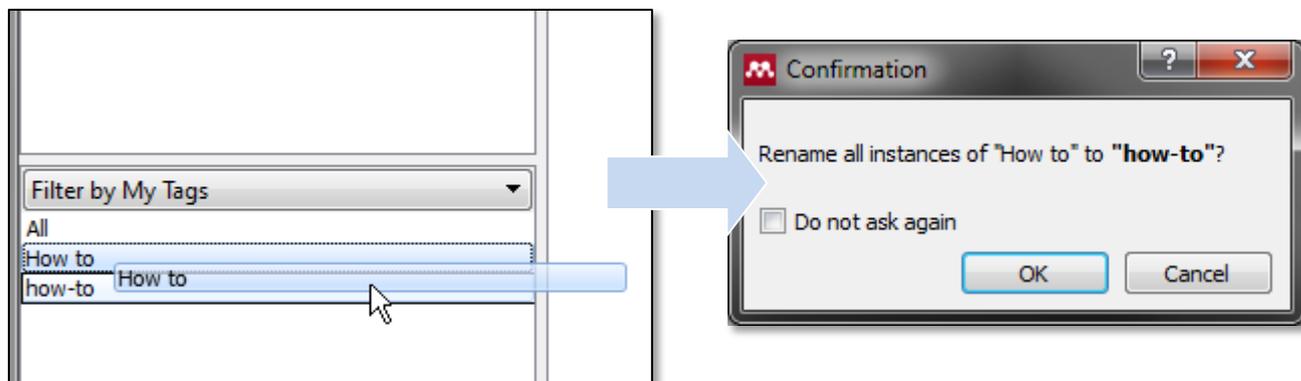
If you want to have access to your PDFs from anywhere, activate the file synchronization feature. By enabling this feature you are able to access your PDF files in your Mendeley Web library.

1. Make sure that “All Documents” in the “My Library” pane is selected
2. Select “**Edit Settings**”
3. Adjust the settings to your needs.
4. **Synchronize** your library
5. Login to your Mendeley Web account and see the result in your library

2. Managing your documents and references

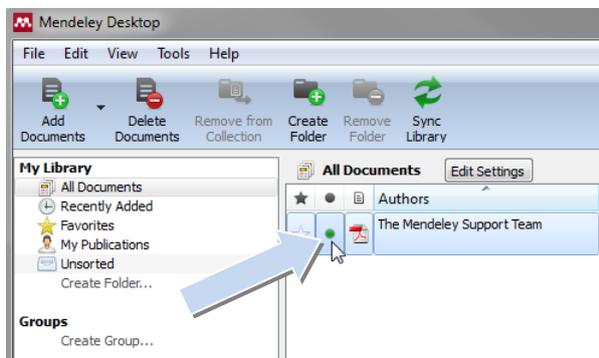
Merge duplicate author names, tags, or publications

In the filter by authors/tags/publications pane, click a name you recognize has been duplicated or is incorrect, and **drag & drop** it onto the correct one to rename it.



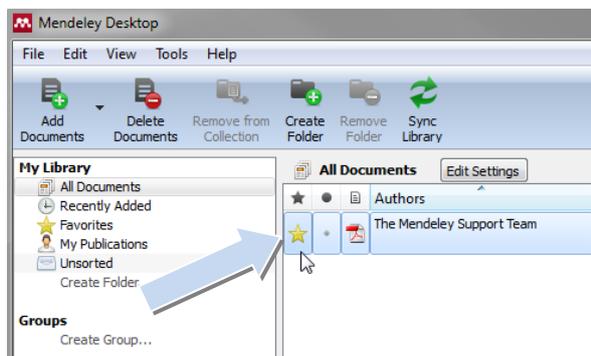
E.g. if you have two documents tagged "How to" and "how-to", dragging the latter one onto the former will rename the incorrect entry.

Documents can be marked read/unread



Keep track of your unread papers. When you add documents to Mendeley, they are marked unread by a small green dot. If you open them within the Mendeley PDF viewer they will be marked read. Or simply click on the green dot to toggle read/unread.

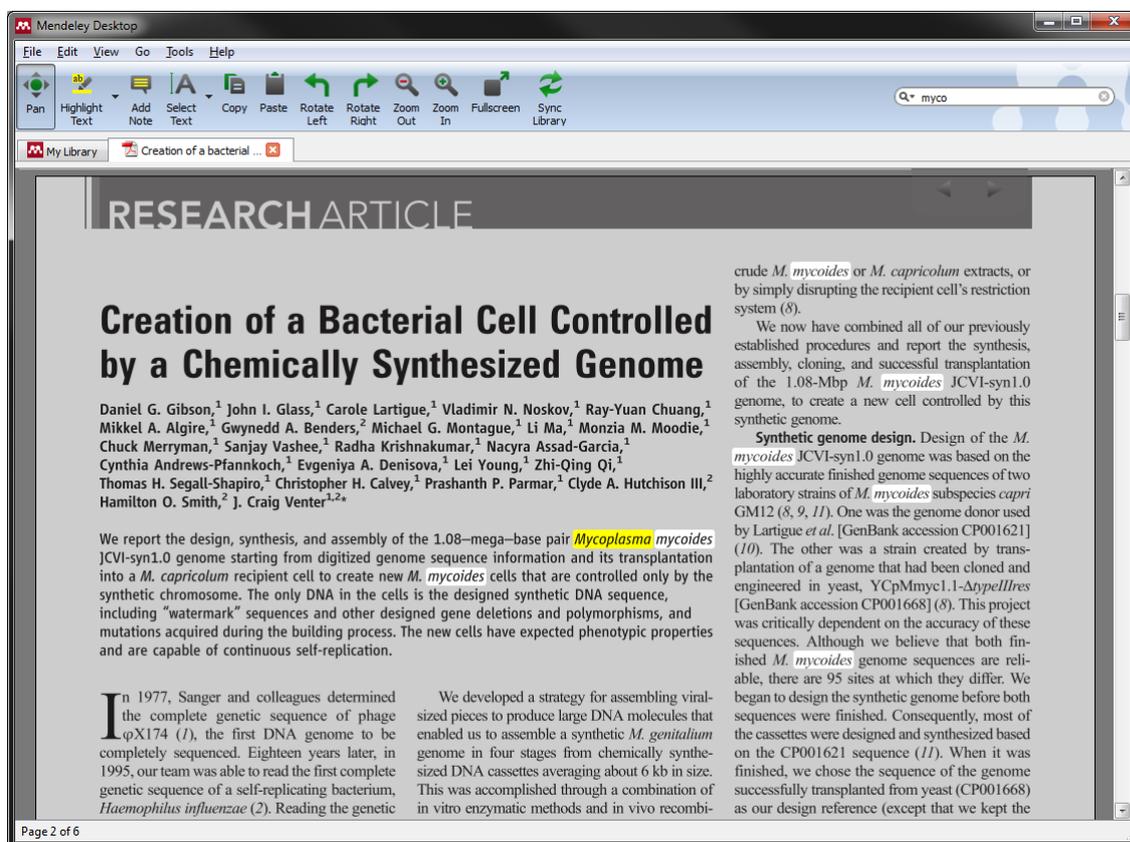
Favorites



You can mark your favorite documents (or documents you keep want to track of) with the star icon. Simply click to star, and click again to un-star. All favorite documents will appear in the **Favorites** Folder, so you can refer back to them with one click.

Search as you type

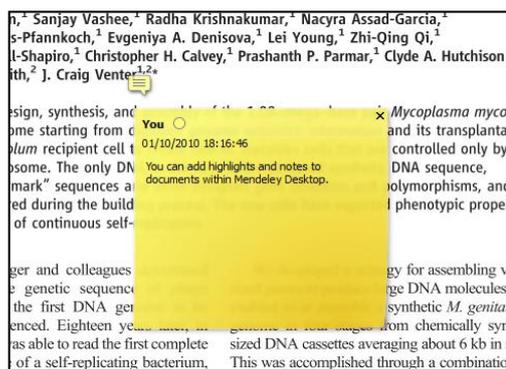
Smart search in documents highlights the search term as you type, so you can find what you're looking for quickly. Just type into the search bar and watch Mendeley find matching terms in the document.



Annotate PDFs

You can add highlights and notes to documents within Mendeley Desktop.

1. Open a PDF in Mendeley's PDF viewer by double clicking on it in the central pane,
2. Add highlights and notes by clicking on the **Highlight Text** or **Add Note** buttons on the menu.



You can share these annotations with your co-workers. To do so

1. Open a PDF that is part of a Group (see below),
2. Make your annotations,

3. Sync these annotations to Mendeley Web by going back to “My Library” and clicking on “Sync Library”.

Note: These annotations are not stored in the actual PDF-file, but rather in your Mendeley account. To create a new PDF file that contains all annotations, you can export the PDF with all its annotations by choosing: File → Export with Annotations from within the Mendeley PDF viewer.

Multiple level undo in document details

You can undo recent changes to your document details or annotations by clicking **Undo** in the usual place. Select the following option in the drop down menu:

Edit → Undo
or Ctrl+Z (Cmd+Z for Mac)

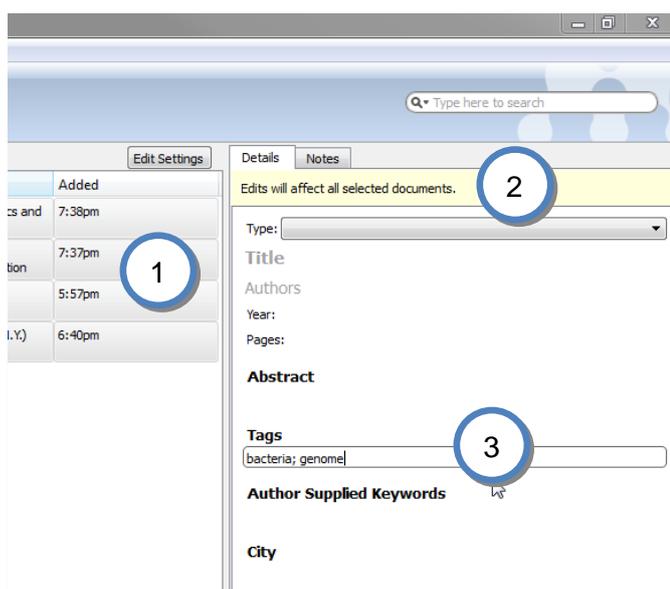
Tag and edit multiple documents at once

When you want to tag or add details for more than one document in one go:

1. **Select the documents** you want to edit at once by pressing Ctrl + left clicking the documents you want to select
2. **Notice the batch editing confirmation message**
3. **Input your data**

The data can be tags, notes, or other document details such as the publication name.

E.g., in this example the entered tags will be applied to all selected documents.



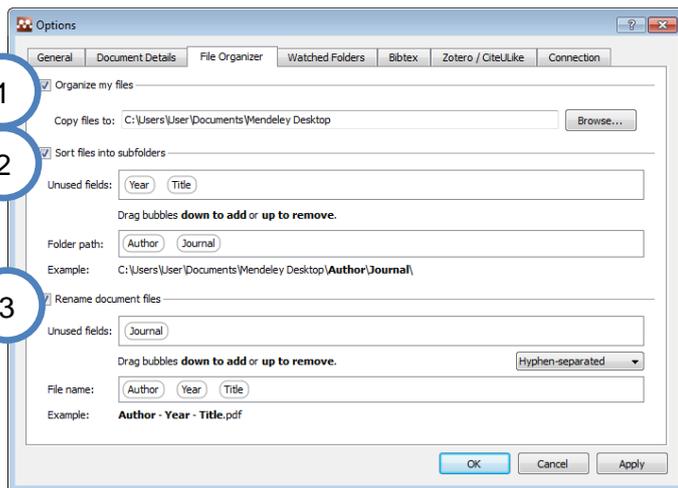
File Organizer

Mendeley's file organizer can automatically rename your PDFs and file them in a clear folder structure, making it easier to find your files outside of Mendeley. You can find it here:

Tools → Options File → Organizer tab
or for Mac choose: Mendeley → Preferences → File Organizer tab

In the tab, select:

1. **Organize my files:** to make a copy of all documents added to Mendeley within one folder
2. **Sort files into subfolders:** to create a folder structure based on selected document details
3. **Rename document files:** to rename the often non-descriptive names of your PDFs to file names that are more meaningful, including the author, journal, year, and title



Once you have your documents in Mendeley, you can cite and reference them within Word and OpenOffice Writer with ease.

3. Citing references

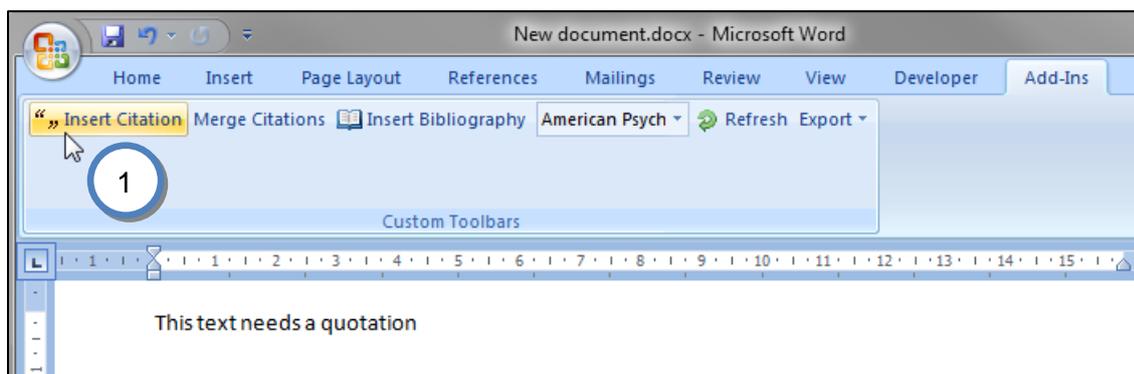
Installing the Word and OpenOffice Writer plug-in

The Mendeley Word & OpenOffice plug-ins integrate Mendeley into your word processor. To install the Mendeley plug-in, simply click on the Tools menu within Mendeley Desktop and select the option for the word processor you wish to use.

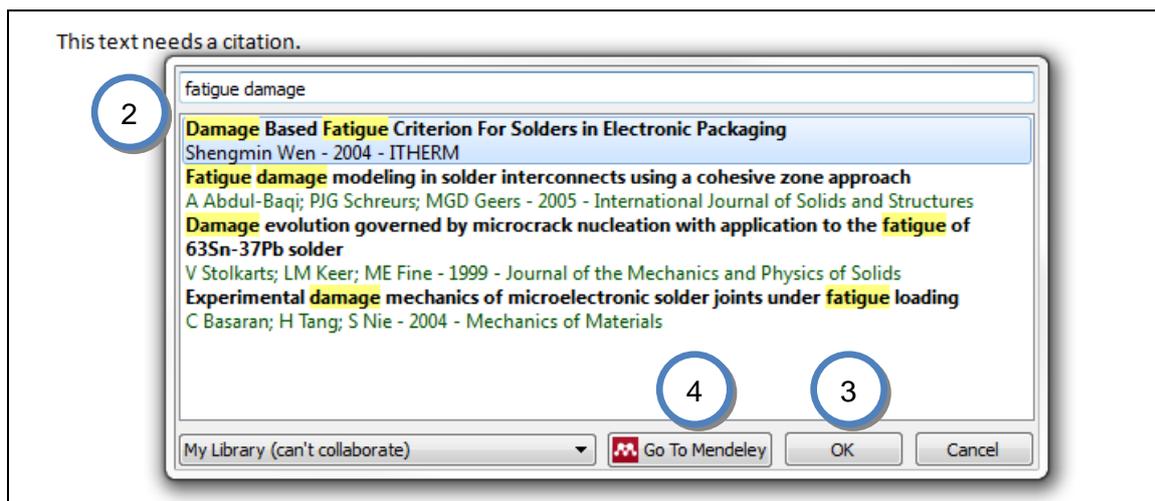
Using the Word and OpenOffice Writer plug-in

Once installed you will have toolbar buttons that will allow you to cite a document, generate a bibliography, or manually edit any entry.

1. When you are creating a paper and you want to cite a document from your Mendeley Library just click on Insert Citation in the Mendeley toolbar:

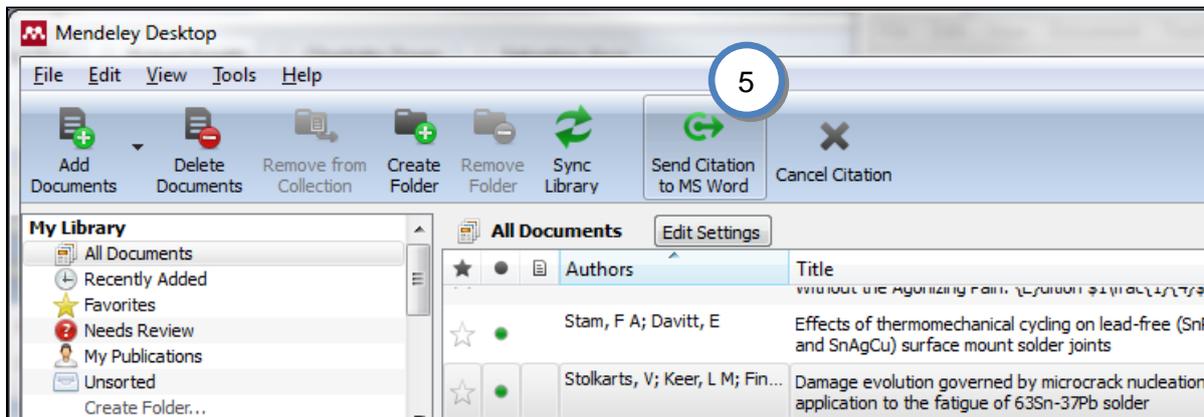


2. If you are using **Word on Windows**, a box will appear allowing you to search for references by author, title or year (note that this is only available for Microsoft Word for Windows at the moment; for Word on Mac or OpenOffice, see step 5).

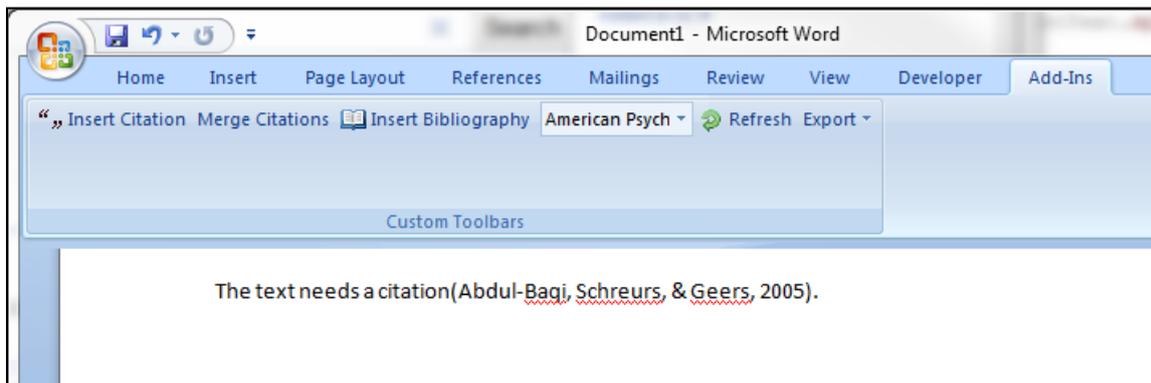


3. When you find the reference that you want to cite, just click OK and you're done. Note that you can cite multiple references, by using semicolons to separate them.
4. If you prefer to find references using Mendeley Desktop, press the "Go to Mendeley" button beneath the search box, which brings up Mendeley Desktop.

- Then **select the document** in Mendeley Desktop, and click **Send Citation to MS Word** (or OpenOffice Writer, respectively). Again, you can also cite multiple documents. Just hold the Ctrl key and left click the documents you want to cite.



Whichever way you go, your citation will be sent to your word processor:



You can select your preferred **citation style** in the drop down menu in your word processor.

You can now generate a bibliography by clicking **“Insert Bibliography”**:



A warning for OpenOffice users:

OpenOffice users, DO NOT use File → Save As to save in .doc format. This will remove all Mendeley field data. Instead use the “Export MS Word Compatible” button.

Please ensure you have "Tools → Options → Load/Save → General → Always save as" set to ODF.

Cite in Google documents (and other editors)

You can also add citations in other text editors, such as Google Docs. Just select the paper you want to cite in Mendeley Desktop and click:

Edit → Copy Citation

Then Paste it into the document you are composing. Alternatively, you can drag & drop the paper from the Mendeley Desktop window to the document, and a reference in the current selected citation style will be added there.

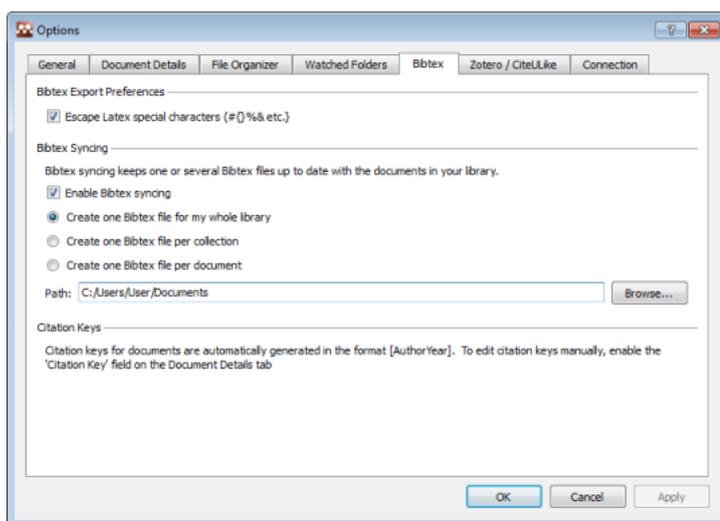
Cite using BibTeX

You can also cite and create bibliographies in LaTeX documents. Mendeley Desktop creates a BibTeX file for your entire library, for each group or per document. The BibTeX file(s) are updated each time you make a change to your personal library in Mendeley Desktop.

The citation keys are automatically generated in the format [AuthorYear]. You may edit citation keys manually by enabling the “Citation Key” field under Options (Document Details tab). Then you can edit citation keys under the Document Details tab in your library.

You may enable BibTeX support here:

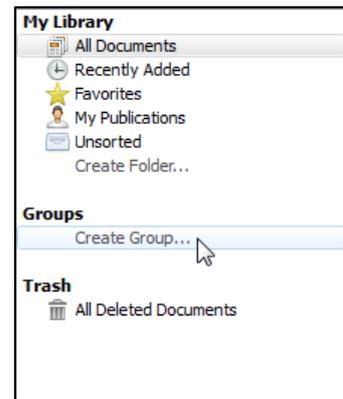
Tools → Options → Bibtex Tab



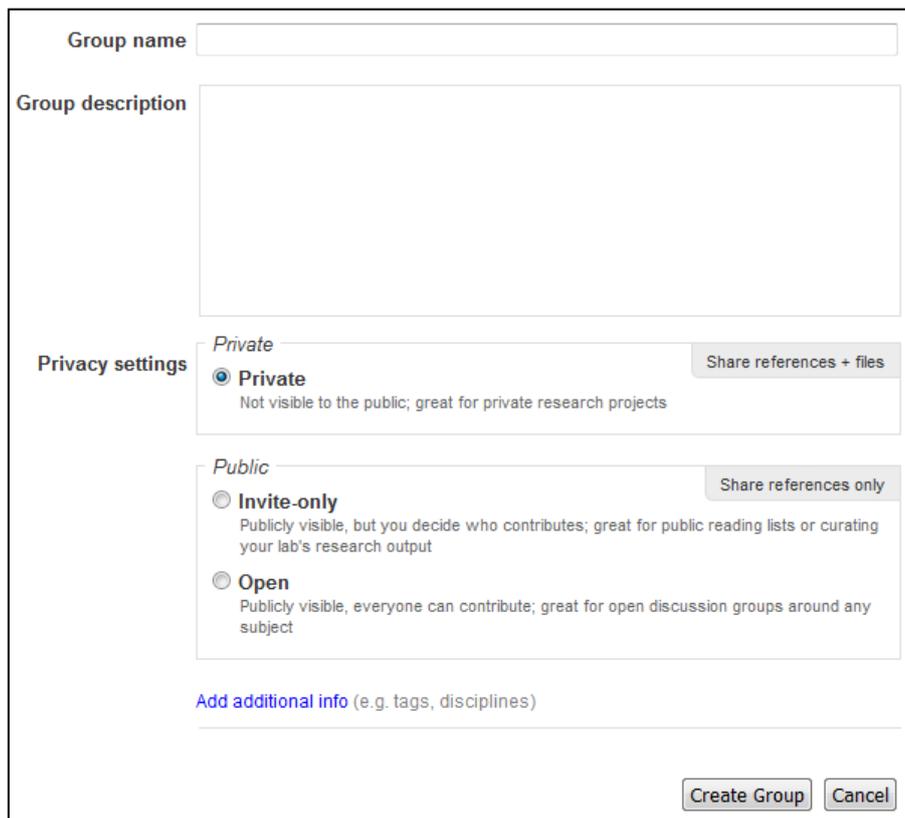
4. Sharing Documents and References

How to Create a Group

Groups are a simple way for you to collaborate with your colleagues and share a collection of documents. Any member of a group may upload documents to it. You can create a group by clicking on “Create Group” in the left hand pane.



Once you have clicked “Create Group”, a dialog asking you to enter details of your group will appear.

A screenshot of a 'Create Group' dialog box. It features a text input field for 'Group name' and a larger text area for 'Group description'. Below these is the 'Privacy settings' section, which is divided into 'Private' and 'Public' categories. The 'Private' option is selected with a radio button and includes a 'Share references + files' button. The 'Public' category includes 'Invite-only' and 'Open' options, each with a radio button and a 'Share references only' button. At the bottom, there is a link for 'Add additional info (e.g. tags, disciplines)' and two buttons: 'Create Group' and 'Cancel'.

1. **Group name** allows you to specify a name for your group.
2. **Group description** allows you to enter details about the group.
3. The section **Privacy settings** allows you to choose the type of group you want to create (see below).
4. To add **Tags**, or to assign a **research discipline** to your group (by default, this is your own discipline) click on **Add additional info**.

5. Click on **Create Group** to finish.

Note: You can review these settings later by clicking on “Edit settings”.

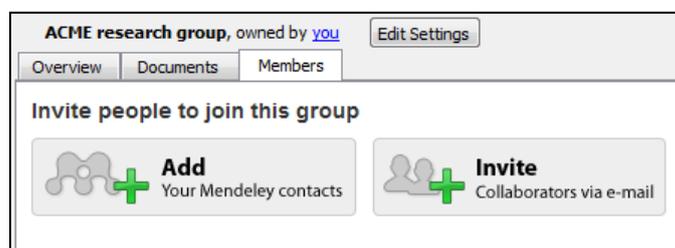
There are three types of groups:

1. **Private Groups** – These are invite-only groups whose content will only be visible to members of the group. These groups are great for private research projects.
2. **Public Invite-only Groups** – These are groups which are visible to anyone, but only members can contribute to them. These groups are great for public reading lists or curating your lab’s research output.
3. **Public Open Groups** – These are groups anyone may join and contribute to. They are designed for open discussion groups around any subject.

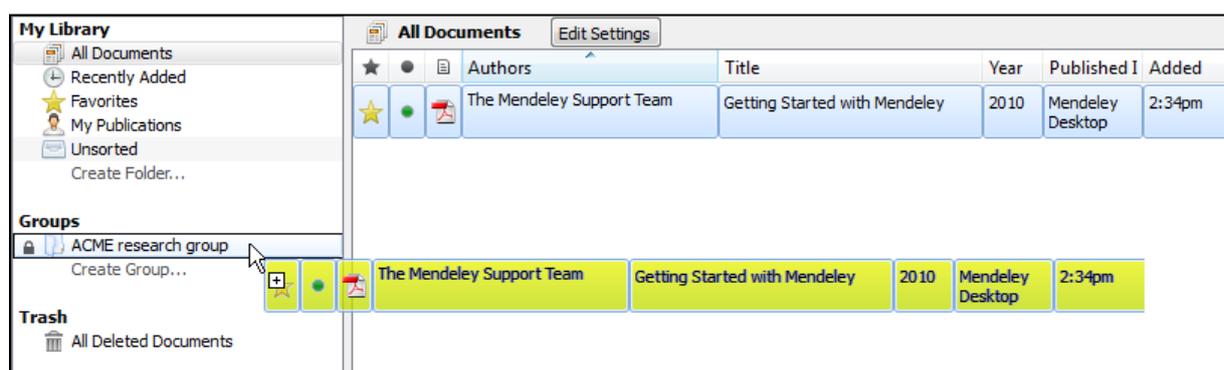
Adding members and documents

Once you have created your group, you can add members and documents to it.

1. To **Invite Members** to the group go to the Members tab.
2. You can either add people that are already your contacts on Mendeley by clicking on “**Add**”, or you can invite people to join you on Mendeley by clicking on “**Invite**”.



3. You can view the documents of a group by going to the **Documents** tab. To **Add Documents**, go to the group and click on “Add documents” in the top bar. Alternatively, you can simply drag and drop documents to the group (either from your Mendeley folders, or from anywhere else on your computer).



4. To **download** the PDFs that other group members attach to a group, go to **Edit Settings** and tick “Download attached files to group”.

Note: the attached PDF files can only be shared in Private Groups, not in Public Groups.

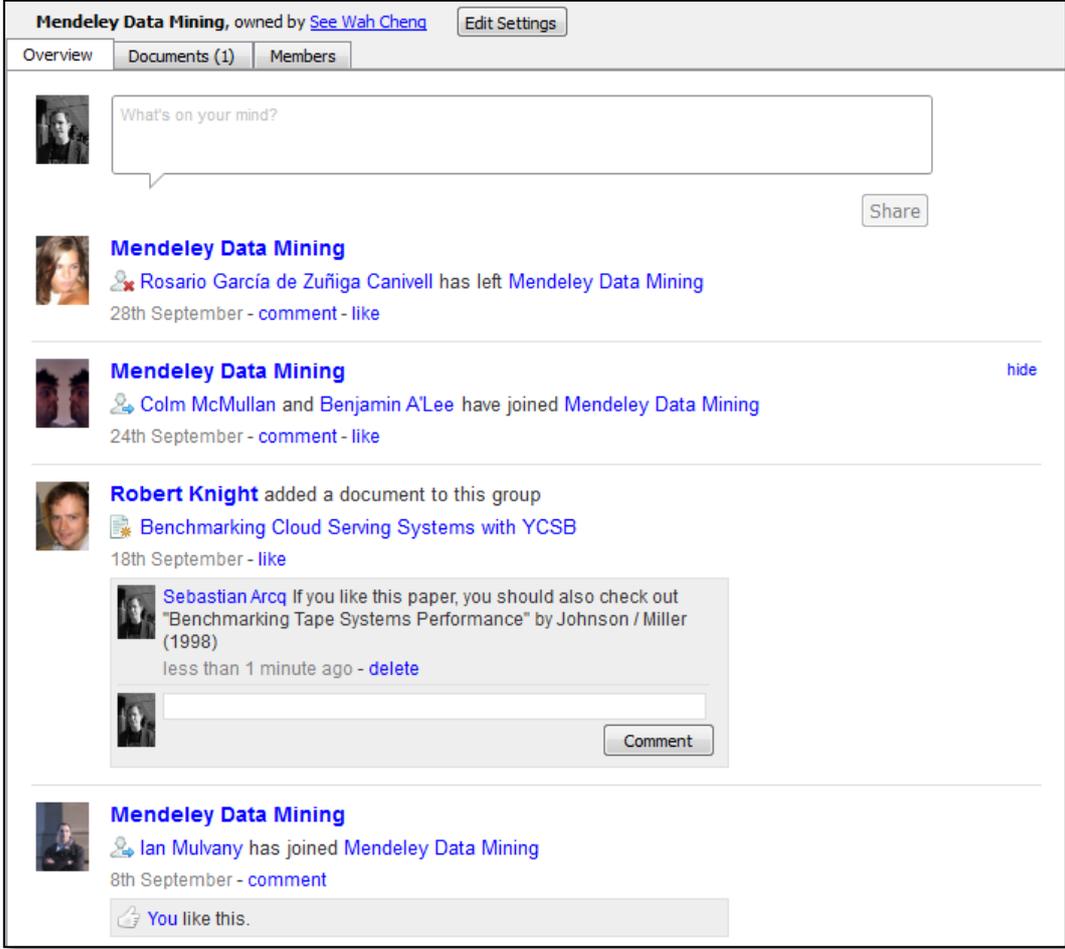
5. To upload your group with all its settings to Mendeley Web, hit the **Sync Library** button.

Using Groups

The overview tab shows a summary of what has happened in your Group. You can see updates on who has joined, who said what, and which papers have been added by whom.

You can also **post status updates** by entering your update into the box at the top of the overview section.

Additionally, you can post comments and discuss your research. Just click on “**comment**” and start a discussion on any given topic.



The screenshot shows the Mendeley Data Mining group overview page. At the top, it says "Mendeley Data Mining, owned by See Wah Cheng" with an "Edit Settings" button. Below this are tabs for "Overview", "Documents (1)", and "Members". The main content area features a "What's on your mind?" text box with a "Share" button. Below the text box are several activity updates: 1) "Mendeley Data Mining" announcement: "Rosario García de Zuñiga Canivell has left Mendeley Data Mining" dated 28th September. 2) "Mendeley Data Mining" announcement: "Colm McMullan and Benjamin A'Lee have joined Mendeley Data Mining" dated 24th September. 3) "Robert Knight" announcement: "added a document to this group" titled "Benchmarking Cloud Serving Systems with YCSB" dated 18th September. Below this is a comment from "Sebastian Arcq" recommending a paper, "Benchmarking Tape Systems Performance" by Johnson / Miller (1998), posted less than 1 minute ago. 4) "Mendeley Data Mining" announcement: "Ian Mulvany has joined Mendeley Data Mining" dated 8th September. At the bottom, there is a "You like this." notification.

With Mendeley Groups you can collaborate, discuss, and discover new research together with your colleagues. Create your own Mendeley Group today!

5. Support

If you would like to request a feature or
report a bug in Mendeley, please visit

<http://feedback.mendeley.com>

or send an e-mail to

support@mendeley.com