Mendeley Basics

Turku University Library

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Creating your account

To use Mendeley you must first create an account. That can be done at http://www.mendeley.com/. Click Create account at the top right corner of the page.

The system requires your email, your name and a password. Your password should be unique to Mendeley. The email you use at Mendeley can be any email (you do not have to use UTU email). You will also be asked to provide your field of study and your academic role, but this step is voluntary.

Profile

Mendeley automatically creates a profile for you. This profile can be seen by other users as well as Google, unless you edit your privacy settings. At the top corner of Mendeley you can see your name and a small arrow pointing downwards. You can edit your settings by clicking the arrow.

Settings & Privacy

You can edit your account details at the Settings & Privacy tab.
Account: You can change your password, field of study and other basic settings here. You can also delete your Mendeley profile.

Privacy: You can choose who sees your profile and whether you only allow approved people to follow you. Here you can also disallow Google to index your personal Mendeley profile.

Notifications: Here you can select when and how you want email notifications from Mendeley.

Job Preferences: Here you can upload your resume and be visible to recruiters.

Billing: Adding billing information is not required for the free version of Mendeley.

Editing your profile

To access and edit your own profile, click your name at the top right of the page.

Publications tab allows you to add full-text versions of your articles in addition to their bibliographic data. Be aware, however, that you must first make sure you have the right to parallel publish the article. You can check the parallel publishing permissions e.g. from the publishing agreement or from the SHERPA/RoMEO service.
Downloading Mendeley Tools

To use Mendeley for in-text citations you will need three tools: The Web Importer browser add on, the Mendeley Desktop program and the Citation Plugin for Mendeley.

Web Importer

Web Importer is either a browser extension (Chrome, Firefox) or a bookmarklet (Safari, IE) you can use to import articles and bibliographic data to Mendeley.

The Web Importer can be downloaded from Mendeley's download page, which can be found by clicking the downward arrow next to your name at the top corner of the page. Choose your browser and follow directions.

**Note!** If you use Safari or Internet Explorer you should first make sure that the browser favorite bar is visible. That can be done by right-clicking the top part of the browser and ticking the line Favorites Bar (or equivalent).

**Note!** Some versions of Firefox might not support the Web Importer browser extension. If this is the case, the bookmarklet (intended for Safari and IE) should still work.

Mendeley Desktop

Mendeley Desktop is a program that can be installed on your computer. It can be downloaded from Mendeley's download page, which can be found by clicking the downward arrow next to your name at the top corner of the page. There are versions for Windows, Mac OS and Linux.

Installing Mendeley Desktop on university computers

If you are using a Turku university computer and you do not have Administrator privileges, you can download Mendeley Desktop and its updates from the Software Center.

Citation Plugin

Citation Plugin is a word processor extension that is required for using Mendeley for in-text citations.

It can be downloaded from Mendeley Desktop's menu bar, see 'Tools'. The Citation Plugin is available for MS Word and LibreOffice.
Importing Bibliographic Data to Mendeley

You can add documents and references to Mendeley in different ways: by adding PDF files directly, by using the Web Importer, by importing RIS or BibTeX files, by using the watch folder function, manually, by using Mendeley recommendations or by searching the Mendeley Catalog database.

Adding a PDF file

If you have a PDF-file on your computer, you can add the file directly into your Mendeley library and have it available across platforms. You can drag the file directly to Mendeley Desktop or click the Add Files button.

**Note!** Always make sure that the bibliographic information is imported correctly. The program might not be able to read all data if, for example, the PDF file is a scanned article.

Watch Folder

You can set up Mendeley to watch a folder in your computer. This function allows Mendeley to automatically import each PDF file saved to that folder. To set the function up follow these directions.

1. In Mendeley Desktop menu bar choose *File - Watch Folder*.
2. Tick the folders you want Mendeley to watch.
3. The PDF files in the folder are imported to your Mendeley library.
4. Once you save a PDF file to that folder, Mendeley automatically imports the file to your library.
5. If you want to discontinue the function, untick the box.

Adding references manually

If you have material you cannot find in databases (like internet pages), you can add the reference manually.
1. In Mendeley Desktop menu bar choose File - Add Entry Manually.
2. First choose the material type from the dropdown folder.
3. The fields you need to fill are adjusted accordingly.

Using the web importer

The Web Importer on your browser can be used on some databases. This function is supported at least by PubMed, Ovid databases, Scopus, ScienceDirect and Google Scholar. You can also try it on Volter, Amazon and other search engines.

1. First make a database search.
2. Click the Import to Mendeley extension icon or Save to Mendeley bookmarklet.
3. A window opens (see picture) where you can choose either to save all or to tick the articles you want and then save them. Saving, in this instance, refers to importing the files to Mendeley.
4. After saving the articles you can choose either the Open in Mendeley option or to switch directly to your Mendeley Desktop. In Mendeley Desktop, click the Sync icon to synchronize the Desktop version with your online account.

Note! If the bulk option doesn't work (ie. Mendeley doesn't recognize all the articles from the search result list), you can try adding articles one by one. If this feels too arduous, try other options such as importing as RIS.
Importing data as a RIS or a BibTeX file.

If the Web Importer does not recognize references, you can create RIS or BibTeX files to import data. This option is generally recommended for EbscoHost, Melinda, ProQuest, Medic and Project Muse (as a RIS file) and for Web of Science (as a BibTeX file).

1. Make a database search.
2. Choose the relevant references. The methods vary between databases.
3. Look for an Export option or an equivalent option.
4. At this point the database asks which format you want to use. Choose RIS (or BibTeX on Web of Science).
5. Depending on your browser you can proceed thusly:
   a. If a window opens with the dialog Open With, you can use that option. Choose Mendeley Desktop from the dropdown menu. You can import the references directly to Mendeley.
   
   ![Image of Open With dialog]

   b. If the only options available are Open and Save (for example in Internet Explorer), choose Save.
      i. look for the folder where the newly downloaded RIS or BibTeX file is
      ii. open Mendeley Desktop
      iii. choose File - Import - RIS Research Information System (*.ris) or BibTeX (*.bib)
      iv. fetch the file you downloaded. If you cannot see the file in the right folder, choose All files from the dropdown menu on the lower right corner of the window

   ![Image of file selection]

   v. the references contained in the file should now be imported to Mendeley

You can find more database specific directions at [http://libguides.utu.fi/reference/mendeley](http://libguides.utu.fi/reference/mendeley)
Mendeley catalog

In the left hand panel of Mendeley there is an option Literature Search. You can use it to search for references in Mendeley's own catalog. Be aware that the full-text versions of these references might not be available to Mendeley users or to Turku University Library patrons.

Related articles

You may use Mendeley to find new articles that are related to your articles by choosing a few articles you already have in your library.

1. Choose articles from your Mendeley library by holding down the CTRL key and clicking them
2. Click the Related icon in the upper panel
3. Mendeley will now suggest references you might be interested in based on the articles you chose.

Organising References

Tags

You can add your own tags to your saved references. Adding a tag can be done in the reference details panel located on the right. There is a specific field for tags (see picture).

You can filter your articles by tags. Choose Filter by my Tags in the dropdown menu in the left hand side panel (the default is Filter by Authors).

Databases may have their own keywords which appear as tags in Mendeley. You can edit them at will.
Folders

It is possible to use folders to organise your references. In the left hand side panel there is a list of your folders and an option to *Create Folder*. There is a create folder icon in the upper panel as well.

You can move references into a file by clicking them and dragging them over the relevant folder. You can choose multiple references by holding down the CTRL key.

Editing References

Whenever you import new references to Mendeley you should check that all the necessary information has been imported correctly. PDF files especially might be tricky in this respect.

The details of a particular reference can be seen in the right hand panel. If you wish to change the details, just click the relevant field and edit.

If the information is insufficient, you can try to update it based on information in the Mendeley catalog. Right-click the reference and choose *Update details*. Mendeley will check if the catalog has additional information regarding the reference.

You can use italics by coding them. Add `<i>` at the beginning and `</i>` at the end of the text you want to appear in italics.

Checking for Duplicates

Before commencing writing it is wise to check that your library does not contain multiple entries of the same reference. By doing this you also make sure that your future bibliography won't contain the same reference multiple times.

1. Choose the *All Documents* folder in Mendeley Desktop.
2. Choose *Tools - Check for Duplicates* in the menu bar.
3. A list of duplicate references will be displayed.
4. By clicking the reference you can check its details. If there is no tick next to a field, the references differ.
5. You can view the different versions by clicking the arrow in the center panel on the left side of the reference.
6. If by comparing the different documents you discover the references to be duplicates, you can click Confirm Merge in the details panel.
7. If a reference is not a duplicate, activate it and click Not a Duplicate in the details panel.

After merging the now merged document can still be found in the folder where the unmerged documents were before merging.

You can merge the duplicates manually as well. If you notice duplicate references you can choose both by holding down the CTRL key. A yellow field with a Merge Documents button appears in the details panel.

Separate Bibliographies
By dragging and dropping from Mendeley Desktop you can create separate bibliographies.

1. Choose a citation style by clicking View - Citation Style in the menu bar.
2. Choose the articles you want in your bibliography while holding down the CTRL key.
3. Holding down the mouse button, drag the references into a word processor like MS Word.
4. A bibliography in the chosen citation style appears.

Using Mendeley PDF Reader

If you have imported PDF files to Mendeley you are able to read them and make notes on Mendeley. By clicking the PDF icon next to the listed reference a new PDF reader tab pops up. You can add annotations by clicking the Note icon and highlights by clicking the Highlight icon.

You can also export the PDF files including their annotations. In this case, choose File - Export PDF with Annotations in the menu bar.
Using a Citation Plugin

To make use of Mendeley while writing research papers, you will need a plugin for your word processor. The following directions are for MS Word Plugin. There is an equivalent plugin for LibreOffice as well.

Installing the plugin

Click Tools - Install MS Word Plugin in the Mendeley Desktop menu bar. The program might ask you to close all MS Office programs (see picture) or to turn MS Word first on and then off again. After following directions you can install the plugin by pressing Install MS Word Plugin.
In Windows, the Mendeley plugin can be accessed in Word by clicking the References tab (Finnish: Viitaukset).

Generating a citation

To generate a citation, click the References tab and choose Insert Citation. The following window pops up.

You can pick the citation you want in Mendeley Desktop by clicking Go To Mendeley or you can search for the citation directly by typing in the Search by… field.

In Mendeley Desktop, after you choose the relevant references you wish to cite, an icon with quotation marks appears in the upper panel. By clicking it you can export the citations to MS Word.

Choosing the citation style

To change citation styles, in the References tab, choose either a suitable style or More styles from the Style dropdown menu. From More Styles menu you can search for different citation styles. Once you have picked a style, the document updates accordingly.
Editing a citation

1. To edit a citation, for example to add page numbers or to hide the authors, click the citation itself.
2. The Insert Citation button is now Edit Citation.
3. By clicking the icon the Insert Citation pop up appears but with the citation you already chose in the search field.
4. By clicking the citation you can edit it.
5. If you wish to make sure that page number markings appear the way you want them to appear, use the Suffix field. Remember to add the required spaces and punctuation.
**Note!** The *Edit Citation* function should only be used for editing small details or adding page numbers. If you wish to edit the bibliographic details, this should be done in Mendeley Desktop.

Adding a bibliography

To add a bibliography, insert the cursor where you want the bibliography to be. Click the *Insert Bibliography* button in the references tab. This action creates a bibliography that lists all the references you have added by using the citation plugin.

The final paper

If you wish to have the final version of the paper without any links to Mendeley, choose *Export as - Without Mendeley Fields* from the references tab.

**Note!** As this action removes all Mendeley links and editing capabilities from the resulting document, you should make sure not to delete the original document with Mendeley Fields in case you wish to make further edits with Mendeley. You can export multiple times!
The Social Side of Mendeley

In addition to reference management there is a social networking side to Mendeley as well, like a Facebook for Mendeley users. You can join groups, follow researchers and follow the usage statistics of your own publications.

Follow researchers

You can follow researchers so that their updates (e.g. new articles) can be seen in the newsfeed of Mendeley’s online version. You can also send them private messages via Mendeley.

To search for researchers click Search. Make sure you have the People option active (see picture).

Groups

Mendeley has three different types of groups: private, invite-only and public. You can also search for groups with the search function, once you have the Groups option active (see previous picture). There are public groups for many different themes.

Users of the free version of Mendeley are able to create five private groups with 25 members at most. Private groups cannot be seen in the group search. In a private group, you can share references and PDF files. All group members can see the annotations made in the group documents.

Statistics of your personal publications

In case you have added publications of your own into your Mendeley profile, you can view their statistics. The default view of the profile is Overview. By changing it to Stats you can see the reader statistics. If the publications are indexed in Scopus, you can also see their citation statistics.