UNIVERSITY OF TWENTE.



Getting started with Mendeley



Guide by ITC faculty library

February 2016



Table of Contents

| 1 | Mer | ndeley in not even 10 steps | 2 |
|----|------|---|----|
| | 1.1 | Go to www.Mendeley.com and register | 2 |
| | 1.2 | Download Mendeley desktop | 2 |
| | 1.3 | Find your browsers bookmark toolbar | 5 |
| | 1.4 | Install the Word plugin | 6 |
| | 1.5 | Start building your library | е |
| | 1.6 | Create your Watched Folder : | g |
| | 1.7 | Inserting citations and references – two ways | 10 |
| | 1.8 | Change your citation and output style | 11 |
| | 1.9 | Edit your citation | 12 |
| 2 | Mer | ndeley things to know | 13 |
| | 2.1 | Research databases | 13 |
| | 2.2 | Importing references / drag and drop pdf | 12 |
| | 2.3 | The DOI saves the day | 13 |
| | 2.4 | Literature Search in Mendeley Crowd-sourced online research catalogue | 13 |
| 3 | Orga | anizing your Mendeley library | 15 |
| | 3.1 | Import other libraries. | 15 |
| | 3.2 | Create folders & sub-folders | 16 |
| | 3.3 | Search the full-text of your library | 16 |
| | 3.4 | Where are my pdf's? | 17 |
| | 3.5 | Read, mark and add sticky notes to the saved articles | 17 |
| | 3.6 | Automatically organizing your pdf's | 18 |
| 4 | Doc | ument-types and output-styles | 19 |
| | 4.1 | Different document types | 19 |
| | 4.2 | Output styles | 20 |
| 5. | Mer | ndeley and BibTex / LaTeX | 21 |
| | 5.1 | Export from Mendeley to BibTex | 21 |
| | 5.2 | Automatically create a BibTex files | 21 |
| 6. | Mer | ndeley online | 22 |
| | 6.1 | Create a group | 23 |
| | 63 | Create your own profile | 2/ |

1 Mendeley in not even 10 steps

Mendeley is a free reference manager that helps you keep references and literature for your research organized. You can:

- Create and manage citations of books, articles, and more
- Import citations from online resources and publisher's websites
- Automatically extract metadata from imported PDFs
- Collaborate with other researchers online
- Highlight and annotate papers and share those notes with others

Because you have a desktop version and an online version that synchronize you can always work anywhere, from any device and have your library up to date. 2GB of online storage is available.

1.1 Go to www.Mendeley.com and register

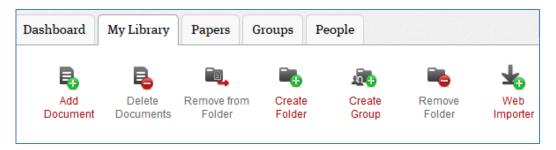
Two important things:

- 1. Create your account using your personal mail adres: name@gmail.com
- 2. Install Mendeley desktop in your **documents** folder, this way it is easier to back-up your references and more important your pdf's.

1.2 Download Mendeley desktop

http://www.Mendeley.com/download-Mendeley-desktop/ Install Mendeley desktop from the downloaded file.

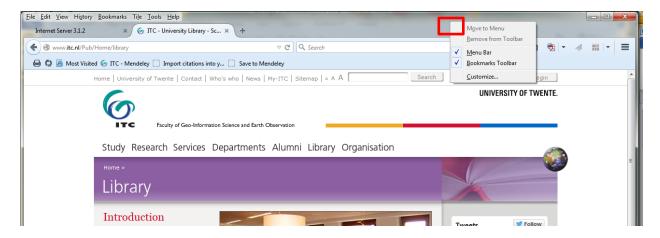
From the my library *tab* on the online library go to the button 'web importer' to drag the 'save to Mendeley' button to the bookmarks toolbar of your browser(s). You can also do this later from the Tools menu in Mendeley desktop.



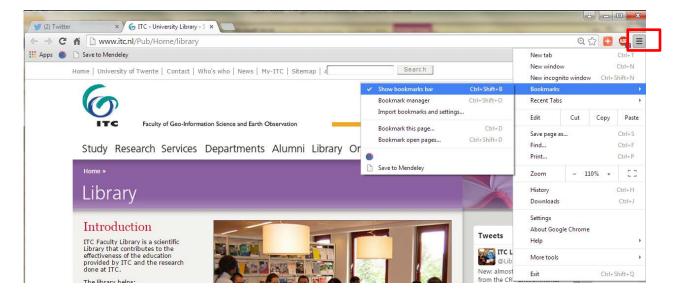


1.3 Find your browsers bookmark toolbar

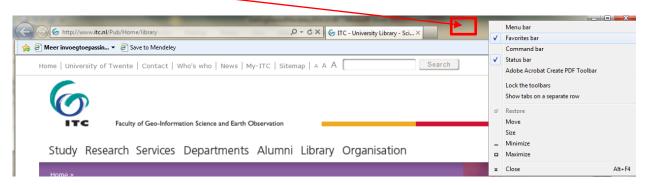
Firefox: right-mouse-click the top bar of your browser, and tick the box for 'bookmarks toolbar'



Chrome: click the menu icon (see red box) move your mouse to 'bookmarks' and 'show bookmarks toolbar' activate this.

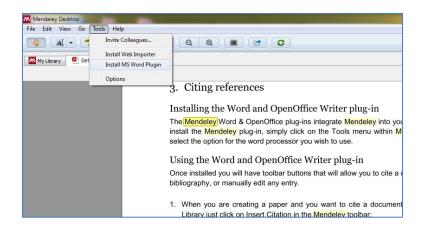


Internet Explorer: right-mouse-click the top of your browser, and tick the box for Favorites bar



1.4 Install the Word plugin

Go to the tools menu in the desktop version. Also you can select another plugin for other word processors.

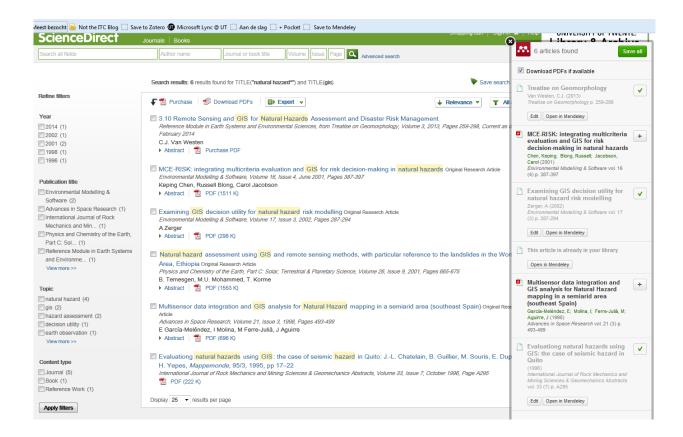


1.5 Start building your library

Importing references with the help of the save to Mendeley button from for example Elsevier, Web of Science, ACM or Wiley online library. The first time in any session you want to import a reference you will be asked to sign in with your Mendeley account. Some examples and notes below:

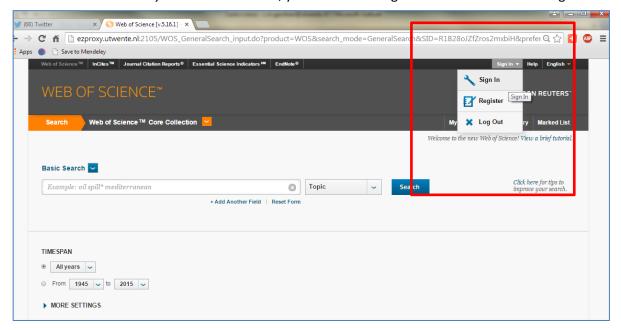
From Science Direct by Elsevier.

If you have a search with 6 results, and click "save to Mendeley", the export of all references on your screen will start. You can then select the ones you really want from the download list on your screen. Do NOT do this with a result of 12,354 articles! refine your search, or go to one of the articles on your screen and save that one.



From Web of Science:

To use 'save to Mendeley' in Web Of Science, you need to be registered with WOS and be signed in.



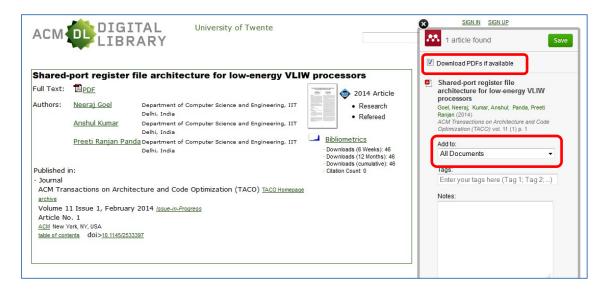
If you get stuck, use the option "full text from publisher" to find the article and get a good "save" of metadata from the publishers website.

Another shortcut:

Type http://dx.doi.org/ in your browser, add the article doi 10.1016/j.habitatint.2015.01.018 And you have created the fastest route to the publishers website, and hopefully full text http://dx.doi.org/10.1016/j.habitatint.2015.01.018

From ACM digital library

The Mendeley web importer will start and offer you the option to include the pdf, and to select the library folder in which you want to 'add' this reference.

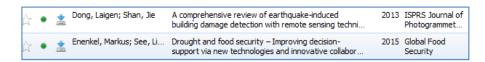




View in Mendeley Desktop by using the "view in Mendeley desktop" button, do not skip this!.

You have now switched from the bibliographic database for literature to Mendeley desktop.

Mendeley now shows you the record, highlighted so you can check and edit the record, and add the pdf by clicking the blue download sign (pdf is not always added directly) if the pdf does not load, save it manually in your Mendeley pdf (watched) folder.



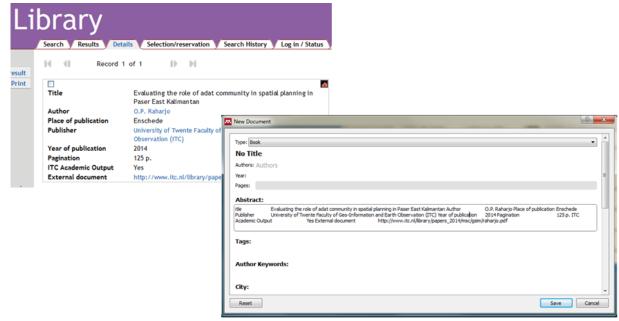
You may have noticed: the pdf is not always automatically imported with the reference.

Drag and drop a pdf to create a reference

- Previously saved pdf's are easily imported into Mendeley.
- Open the folder for these pdf's in a new screen, now drag-and-drop the pdf from the folder to the middle pane of the Mendeley desktop library.

Do it yourself record

If importing information via Save to Mendeley or pdf does not work, you can copy-paste all information on the book, thesis, article from the web-page you are on, into the Abstract or Title field from an empty mendeley record [desktop library: file, add entry manually] and distribute the information into the designated fields, Title, author, place, publisher, year pages, url, doi. etc.

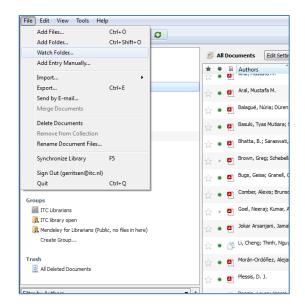


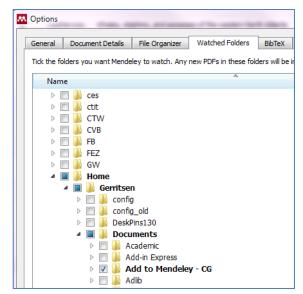
1.6 Create your Watched Folder

In your document folders create a new folder you want to be the dedicated pdf folder for automatic reference import. Next from your desktop library, go to: file, watch folder, navigate to the just created folder to tell Mendeley your preference.

Save a pdf in this specific folder that you have designated your watched folder and your references will be added automatically to your library.

Please check this, because the pdf needs to contain enough metadata to form a reference.





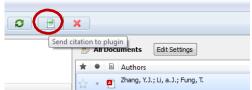
This is how you add a pdf to an already imported reference. In ScienceDirect by Elsevier this also works for the 'download multiple pdf' option.

1.7 Inserting citations and references – two ways

Go to the reference tab in Word, click import citation and use the search bar to find the reference you want to insert in your work, type author or a distinguishing title word.



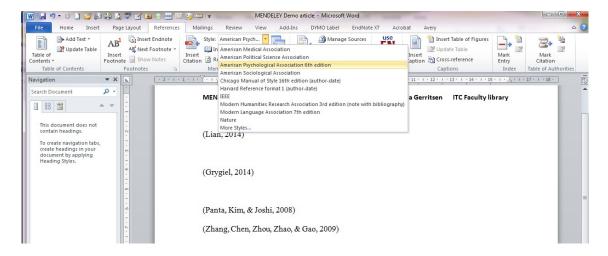
from word, references tab, click insert citation, then on the search bar click *GO TO MENDELEY* to select your reference,



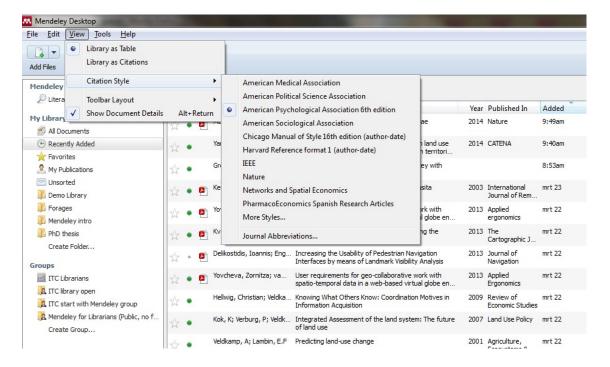
Then you will get the "send citation to plugin" button, meaning send citation to Word button. This way you can also combine two references in one citation.

Mendeley will only add the citation, without reference to your word document. You can add all citations for your paper before adding the references / bibliography with one click of a button. Or if you choose, 'insert citation' first, then 'insert bibliography' and from now on Mendeley will add citation and reference simultaneously.

1.8 Change your citation and output style by using the drop down menu in Word



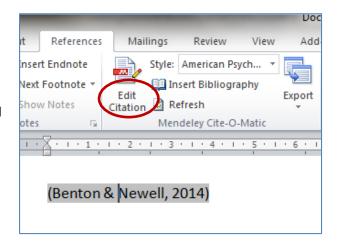
Or the View menu in Mendeley desktop

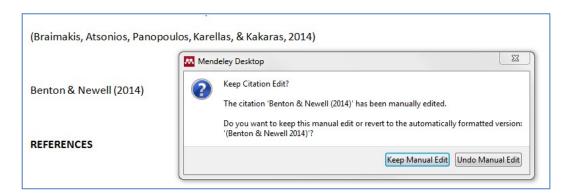


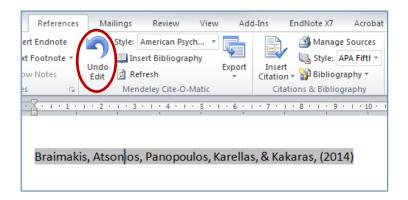
1.9 Edit your citation

In the flow of writing a sentence you may want to place the name of an author outside the brackets. To achieve this simply click the citation and immediately upon doing this your 'insert citation' button now says 'edit citation'. You can now type a bracket before the year and remove the one placed before the author's name.

When you have finished, put your cursor elsewhere in the text and you will be asked if you want to keep this manual edit.







Lateron it is possible to undo this simply by clicking on the citation and use the "undo edit" button. This Mendeley insert citation button has a multi-purpose function!

To completely exclude the author; click the citation, click the now so called 'edit citation button' put your cursor on the author's name in the search bar and click the button "suppress author" this leaves only the Year. The Prefix and Suffix option add text before the author and after the year.

2 Mendeley things to know

All online resources and help by Mendeley http://resources.Mendeley.com/

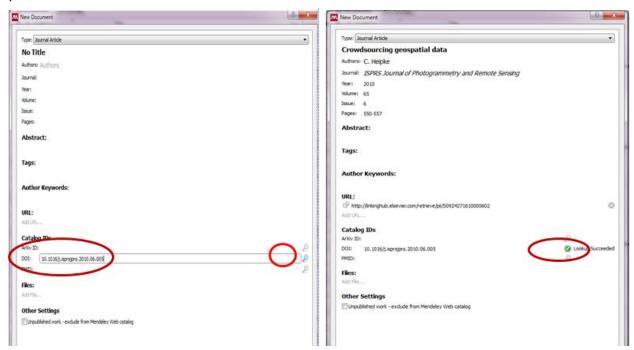
2.1 Research databases

If you use research databases like Scopus, Web Of Science, Geobase or CAB for your research, where the Universities Journal subscriptions are integrated with the database, you may have to click a few times to get to the publishers site before you can download the full text pdf with the necessary metadata. Or type http://dx.doi.or/ in a new browser tab; add the doi http://dx.doi.or/10.1016/j.isprsjprs.2010.06.005 and you will go straight to the publisher's website

Importing data with the SFX banner at the top of your screen, usually does not work. Importing the references from the original publisher's website gives the best metadata.

2.2 The DOI saves the day

If you have trouble exporting your references, try to find the DOI (Digital Object Identifier) of your article, put it in a New Reference (File, Add entry manually) and the Lookup function will complete your reference!



2.3 Literature Search in Mendeley Crowd-sourced online research catalogue

You can use the literature search – bar in Mendeley.

Which database are you using with this search option?

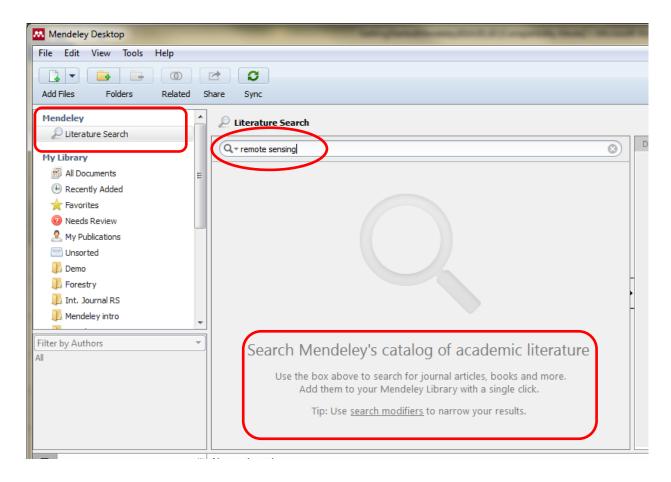
You're searching Mendeley's crowd-sourced research catalog with millions of papers.

Please be aware, this is not the search within your own library!

- It accepts Boolean operators, AND, OR and Not
- Truncation is possible: mode*ing for modelling or modeling
- Just tick the dot before one of the found references to save it to your library

Be aware that most publication types are not properly recognized, given as

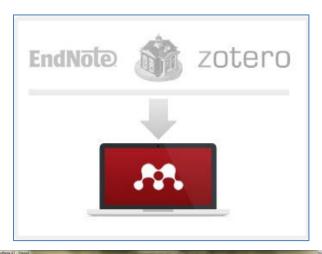
"generic" in the database. Use the look-up function with each reference to complete the reference.



3 Organizing your Mendeley library

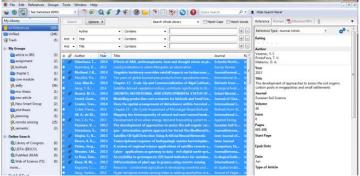
3.1 Import other libraries

Endnote or other libraries can be imported, into Mendeley desktop library, take the next few steps:



Starting from Endnote:

- 1. Select all references
- 2. Go to; File, and Export



Export file name:

Sign Out (gemitsen@itc.nl)

III MSc thesis

3. Select location : save in4. Choose : file name5. Save as type: XML

6. Outpute style: Endnote Export OR RIS

7. Tick the box: export selected references

8. Save

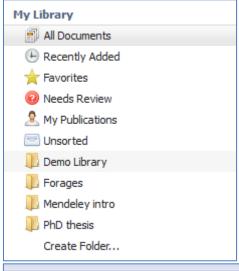
Save in: DATA (D:) G 🤌 📂 🚃 🕶 Name Date modified 🚵 7bec6b1ca990fa2466cb2557 12-4-2013 11:36 File folder ITC_Research_Themes 28-4-2014 16:18 File folder 22-4-2013 12:04 File folder Profiles Desktop 3-11-2014 15:21 XMI Doci elibrary (ad.utwente.nlITCDepartments) (L) - ... 11-8-2014 13:15 Shortcut Libraries File name Save Save as type: XML (*xml) Output style: EndNote Export Add Files Add Folder Add Entry Manually

EndNote XML - EndNote v8, X1 to X3 (*.aml)

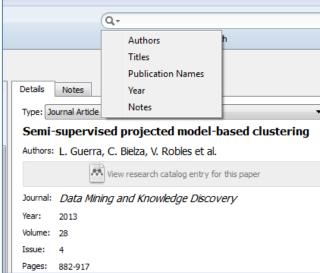
Go to Mendeley:

- 1. Go to: File, import, Endnote OR RIS
- 2. Navigat to the fil you have just save
- 3. .. and import
- 4. Mendeleyev will chek for duplicates

3.2 Create folders & sub-folders and search the full-text of your library



Right click anywhere in the left hand pane to create folders and sub-folders. You can drag and drop files into folders from anywhere. We recommend starting with search to help find things fast. The real usefulness of folders is for reducing the scope of your search

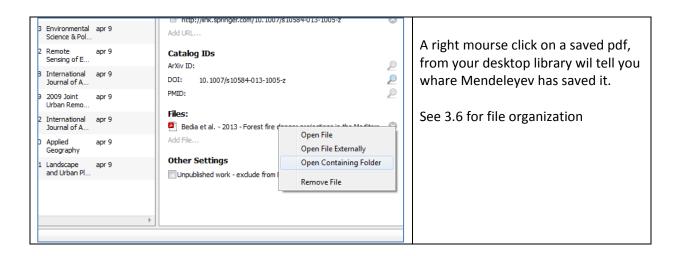


Search for a keyword, titlewords, authors in the top rigth searchbar to find documents instantly as you type.

This searchbar is context sensitive, so if you are reading a pdf, it will search the full text of the pdf (pdf type permitting)

The search includes global notes and tabs by default and you can filter specifically by clicking the filter arrow.

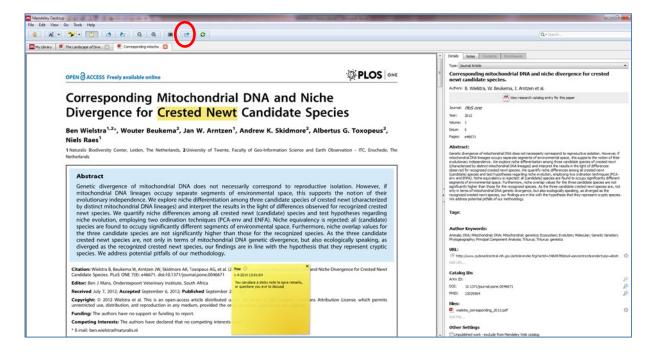
3.4 Where are my pdf's?

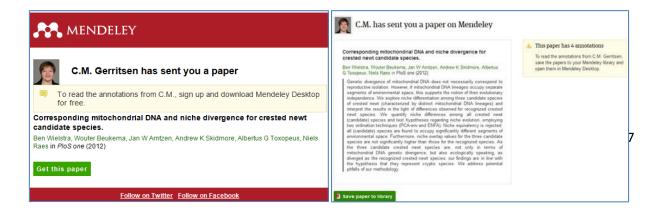


3.5 Read, mark and add sticky notes to the saved articles

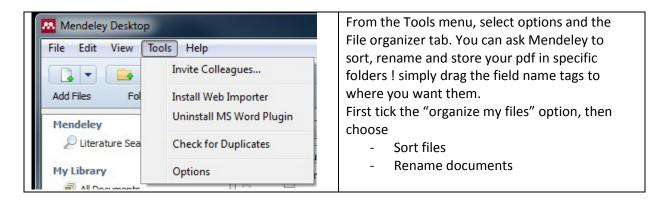
If you double click one of the references in your Mendeley desktop the pdf will open, you can read, make notes, use the highlighter. Etc.

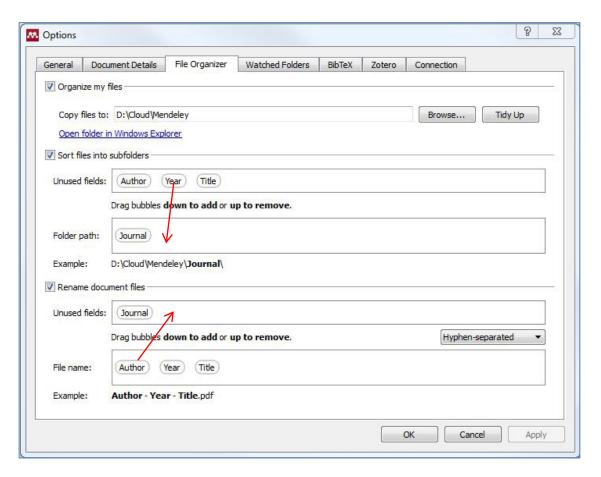
You can share this paper with annotations with your, supervisor or professor





3.6 Automatically organizing your pdf's



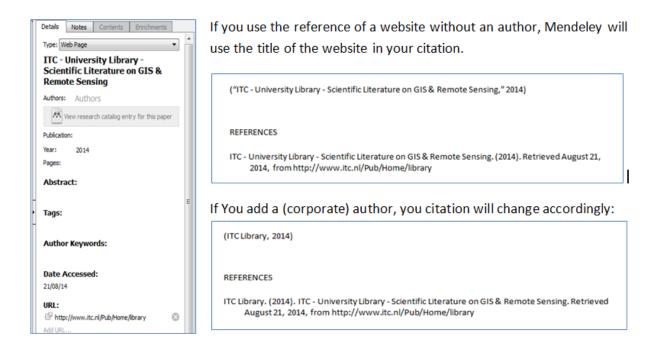


4 Document-types and output-styles

4.1 Different document types

Most used is the journal article, and if your paper and reference comes from one of the larger databases like Springer, Elsevier or Web of Science your reference and citation will be complete. Document types such as reports, msc and phd theses and especially websites may take some attention. In general, always check the reference you have just imported to see if al information is there.

When using the 'save to Mendeley' button on a website you have been using in your research the author of the website does nog appear. As author of a webpage you usually use the Organization or institution that hosts the webpage. In case of a blog you name the person writing the blog.



If you manually add the name of the institute, department, organization as author of the webpage, your citation will be clearer and the reference will make more sense. While typing the name of the author you will be offered the option of marking it as an institution/organization.

If the name of the organization has more than one part add a comma [,] at the end, this will keep the name in the same order and Mendeley will not try to change it into a family name with initials. For example "The World Bank" will not change into "Bank, T.W." if you add the [,] at the end.

MSc or PhD theses

To clearly recognize a MSc or a PhD theses you may want to add (MSc thesis) or (PhD thesis) just after the title in your Mendeley record. You can use both 'Book' and 'Report' as record type for these publications in Mendeley.

4.2 Output styles

The APA style is one of the most used output and writing styles, the reference list generated following this style is very elegant and complete. Please see this schedule on how may authors are used in citations of papers with more than one author.

Citation schedule for APA:

Citing References in Text

The following chart shows how to format in-text citations (6.11-6.15)

| Type of citation | First citation in text | Subsequent citations in text | Parenthetical format, first citation in text | Parenthetical format, subsequent citations in text |
|---|---|------------------------------------|---|---|
| One work by one author | Walker (2007) | Walker (2007) | (Walker, 2007) | (Walker, 2007) |
| One work by two authors | Walker and Allen (2004) | Walker and Allen (2004) | (Walker & Allen, 2004) | (Walker & Allen, 2004) |
| One work by three authors | Bradley, Ramirez, and Soo (1999) | Bradley et al. (1999) | (Bradley, Ramirez, & Soo, 1999) | (Bradley et al., 1999) |
| One work by four authors | Bradley, Ramirez, Soo, and Walsh (2006) | Bradley et al. (2006) | (Bradley, Ramirez, Soo, & Walsh, 2006) | (Bradley et al., 2006) |
| One work by five authors | Walker, Allen, Bradley, Ramirez, and Soo (2008) | Walker et al. (2008) | (Walker, Allen, Bradley, Ramirez, & Soo, 2008) | (Walker et al., 2008) |
| One work by six or more authors | Wasserstein et al. (2005) | Wasserstein et al. (2005) | (Wasserstein et al., 2005) | (Wasserstein et al., 2005) |
| Groups (readily identified through abbreviation) as authors | National Institute of Mental Health (NIMH, 2003) | NIMH (2003) | (National Institute of Mental Health [NIMH], 2003) | (NIMH, 2003) |
| Groups (no abbreviation) as authors | University of Pittsburgh (2005) | University of Pittsburgh (2005) | (University of Pittsburgh, 2005) | (University of Pittsburgh, 2005) |

If you prefer to have only **one author** with each citation, select for example:

- Chicago: manual of style 16th edition or
- Harvard: imperial college London, as an output style.

(Ramoelo et al., 2013)

Ramoelo, A., Skidmore, A.K., Cho, M.A., Mathieu, R., Heitkönig, I.M.A., Dudeni-Tlhone, N., Schlerf, M. & Prins, H.H.T. (2013). Non-linear partial least square regression increases the estimation accuracy of grass nitrogen and phosphorus using in situ hyperspectral and environmental data. *ISPRS Journal of Photogrammetry and Remote Sensing*. 82. pp. 27–40. Available from: http://www.sciencedirect.com/science/article/pii/S0924271613001214.

Others prefer a style called **Numbered** where each citation is just symbolized by [3] for example instead of the author's name. Also the well-known journal "Nature" uses a numbered style for its publications

1

 Ramoelo, A. et al. Non-linear partial least square regression increases the estimation accuracy of grass nitrogen and phosphorus using in situ hyperspectral and environmental data. ISPRS J. Photogramm. Remote Sens. 82, 27–40 (2013).

Have a good look at both citations and references before you change your output style.

5. Mendeley and BibTex / LaTeX

5.1 Export from Mendeley to BibTex

http://libguides.mit.edu/content.php?pid=241351&sid=1992274

"How do I export from **b**to BibTeX?

Open Mendeley, and within "My Library" found on the left, select references that you would like to export to BibTeX. In the drop-down menu in the toolbar at the top of the screen, click "File --> Export" (or ctrl-E if you use keyboard shortcuts) and in the dropdown list of file types, chose "Save as type: BibTeX" and save to the same location as the LaTeX file.

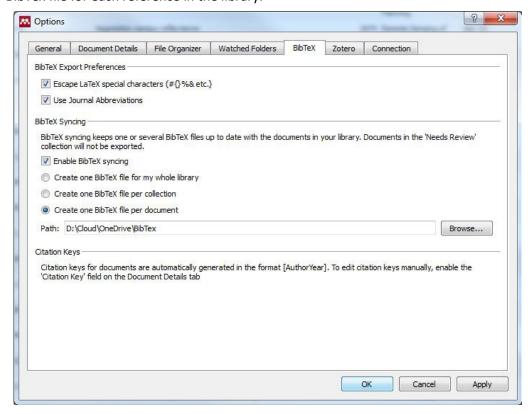
If you're working with Mendeley on a PC and your manuscript is on Athena, you'll need to save the BibTeX export to your hard drive and use FTP or another file transfer method to transfer the file to the correct directory in your Athena space.

To link the bibliography file that you just downloaded to your document, you need to enter two commands: \bibliographystyle{style} should go just inside your \begin{document} command. style.bst is the name of the style file dictating the format of your bibliography (see How do I change the format of the bibliography? below).

\bibliography{filename} should go wherever you want LaTeX to generate the bibliography. filename.bib is the name of the file that you just downloaded from RefWorks containing your exported references. " (Green, n.d.)

5.2 Automatically create a BibTex files

Also from the Tools menu, and options, BibTeX tab you can set **Mendeley** to automatically create a BibTex file for each reference in the library.



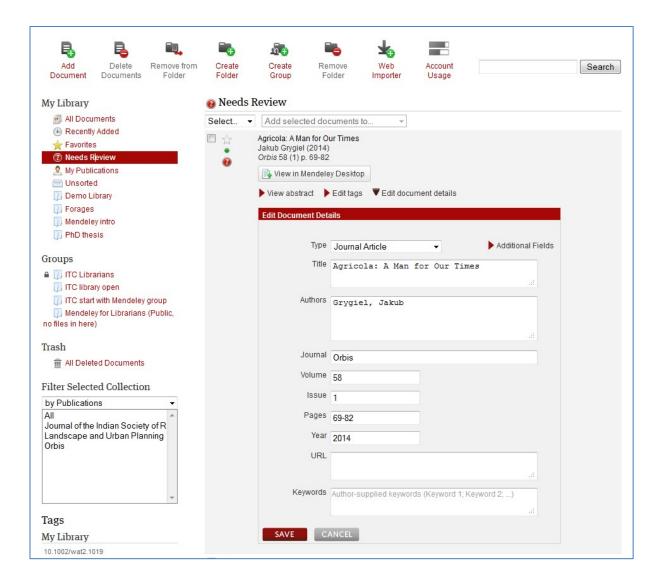
6. Mendeley online

Your online Mendeley library serves as backup and can act as your work platform when you do not have your 'desktop computer' at hand.

You can save references, maybe not always with pdf but the synchronization option of Mendeley will import them into your desktop version when you start-up the next time.

Your online storage capacity for the free Mendeley edition is 2GB

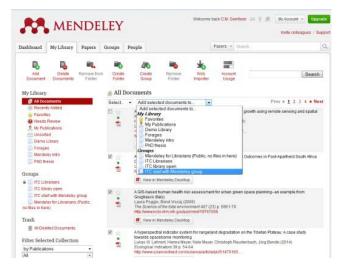
Some editing options are also available in the online version



6.1 Create a group



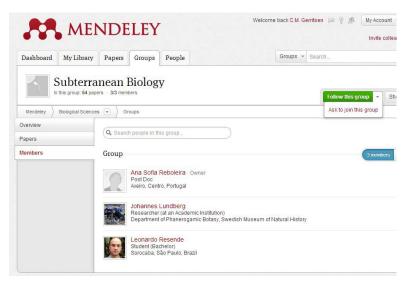
In the free version of Mendeley you can make only one private group of 3 people to share references and your work. You can however make more open groups to share references. In these open groups you can share references when working on a joint project. But you cannot share documents because of copyright.



Move references to this group.

- From your desktop library
- Or From the online Mendeley dash

6.2 Participate in groups

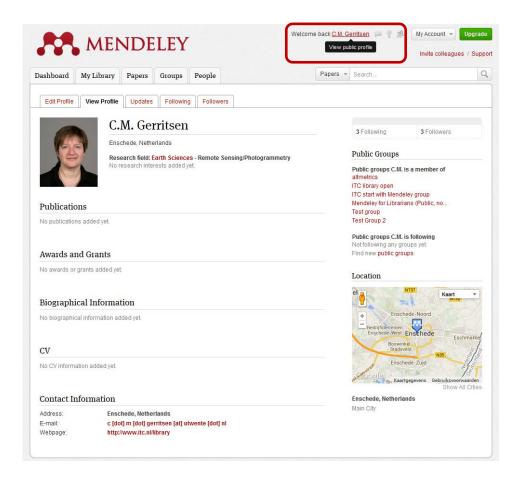


Already a lot of people with Mendeley account have joint groups of their interest, it's possible to search available groups for you topic and see if useful discussions are going round. You can ask to join if it is a closed group, or opt to follow their work.

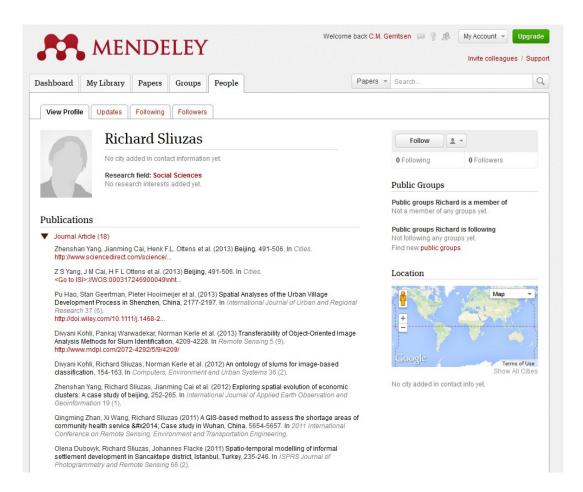
The option to browse groups offers a nice start to see what's available.

6.3 Create your own profile

To work with others, share your experience or build your own profile you can create a Mendeley profile on your online account page, click your name as mentioned after login. Now you can edit you profile, change who you want to follow etc.



Adding your papers will be offer to you by Mendeley, and of course you can add papers yourself.



By using the DOI in your url colleagues from all over the world with access to e-journals can find the papers you're listing on your profile. To share these papers the use of author's copies and prepublication versions is usually allowed by publishers. Open Access papers know no restrictions in this sense.

REFERENCES

Green, R. (n.d.). Research Guides. Mendeley at MIT. Mendeley with LaTeX and BibTeX. MIT Libraries MIT Libraries. Retrieved March 24, 2014, from http://libguides.mit.edu/content.php?pid=241351&sid=1992274