UNIVERSITY OF TWENTE.

Getting started with Mendeley

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ITC faculty library

https://www.itc.nl/library

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1 Mendeley in not even 10 steps

Mendeley is a free reference manager that helps you keep references and literature for your research organized. Start your own information infrastructure right from the start.
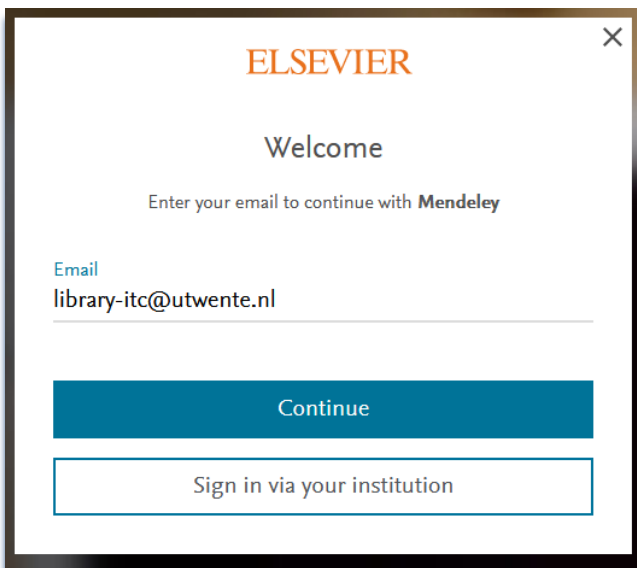You can:

- 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 for free, the Mendeley Institutional Edition (University subscription) provides 100 GB storage.

1.1 Go to www.Mendeley.com and register

Two important things:

1. Create your account using your @student.utwente.nl / @utwente.nl.
2. Click on "Sign in via your institution", this way you can use your credentials from the UT.
3. Install Mendeley Reference Manager on your device.
4. Always use the (proxy) links from the library website to access databases and sign in with your personal UT login to have access to full text articles.

1.2   Download the Mendeley Reference Manager

Download the Mendeley Reference Manager from the website
(https://www.mendeley.com/download-reference-manager) and install the program on
your device.

When the Reference Manager is installed, open the program and log in with your account.

1.3   Install the Mendeley Web Importer

Go to "Tools" in the menu on top and click on "Install Mendeley Web importer".
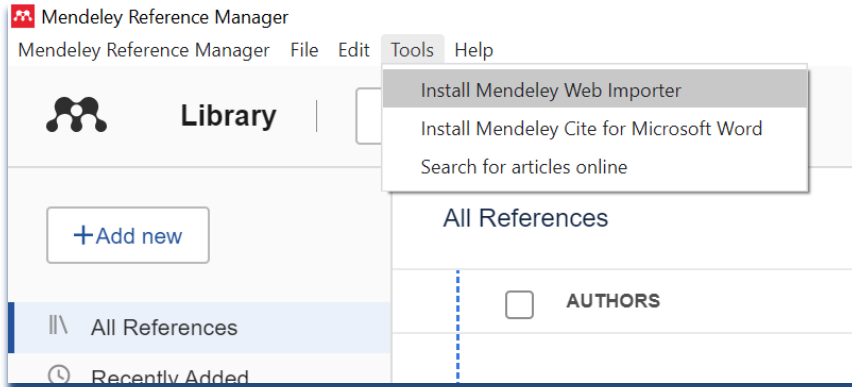
Your preferred browser will open the download page for the Mendeley Web Importer (or
go directly to: https://www.mendeley.com/reference-management/web-importer) .
For Mendeley in **Firefox** or **Chrome**, click the "Get Web Importer for Firefox/Chrome"
button, depending on which browser you like.

*We recommend Chrome or Firefox. Internet Explorer has some issues.
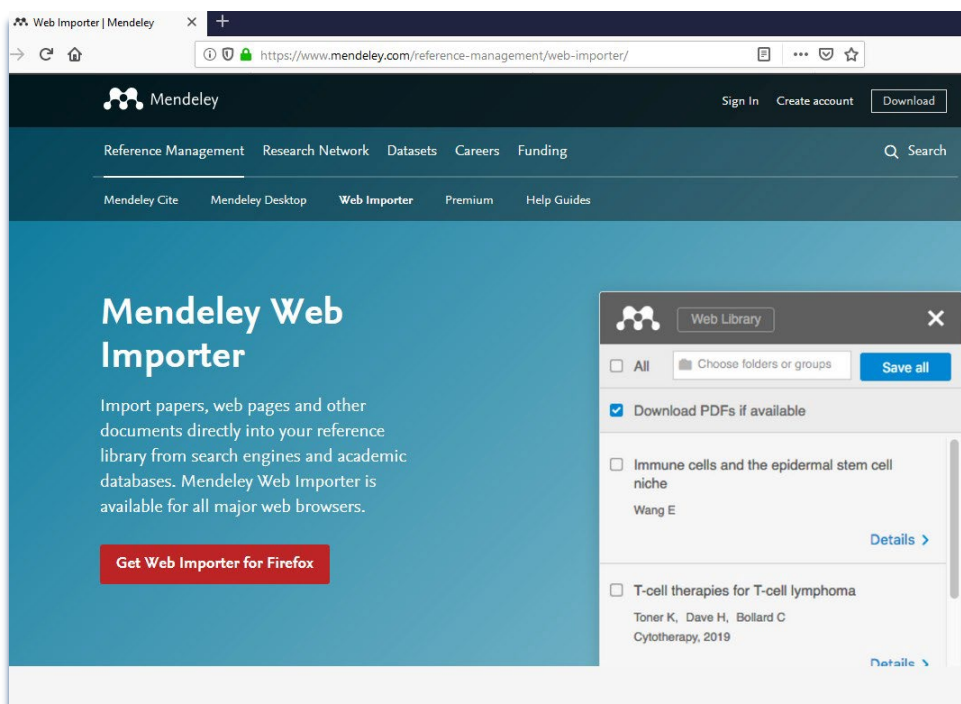
1.4   Install the Word plugin Mendeley Cite

Go to the "tools" menu at the top and click on "Install Mendeley Cite for Microsoft Word".
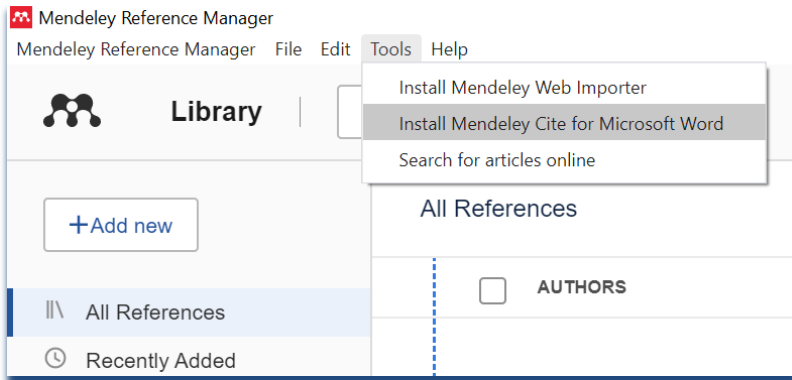
You are taken to the download website for this plugin. Click on "Get it now" and use your UT credentials to sign in to Microsoft AppSource.
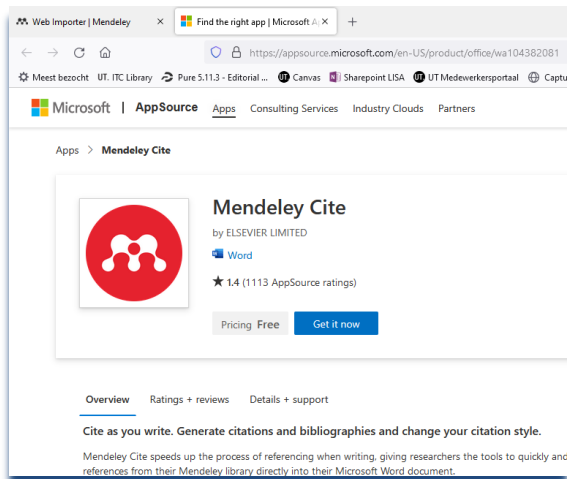
Finish the process by clicking on "open in Word". Word will now be opened and the plugin installed.

Go to the Word tab "References" to find the Mendeley Cite plugin on the right side.

Add-Inns : If your Word Plugin does not appear, try to add this manually via the File menu of Word.

Go to: "File" → "Options" → "Add-Ins" (select "Manage Word Add-ins" at the bottom), Use the "Add" button and navigate to your Mendeley installation on your computer.

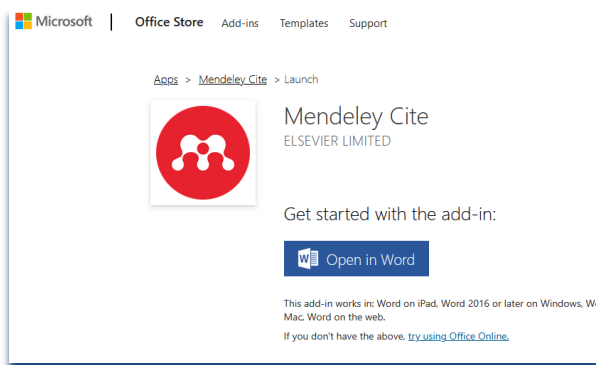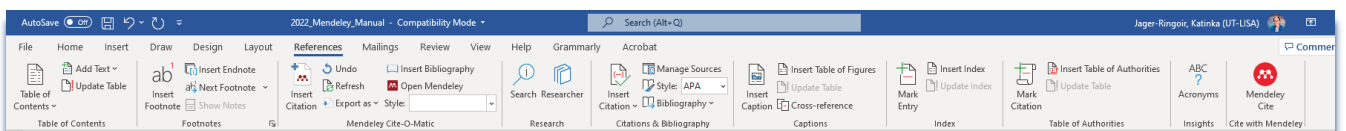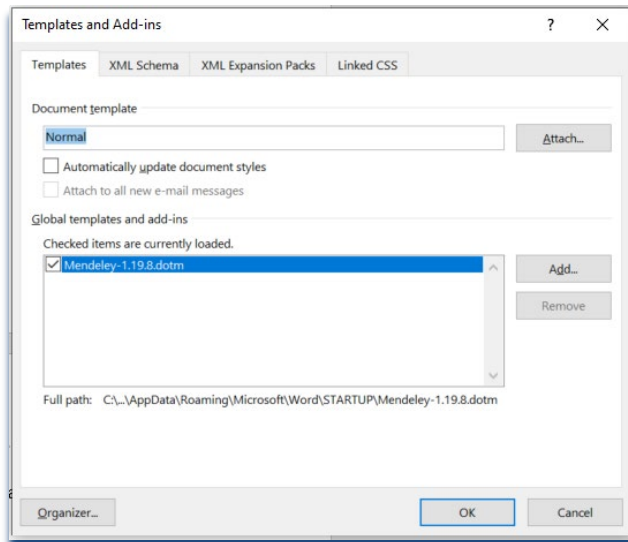Some Word installations give **ActiveX** problems. Please see this video for the fix:
https://www.youtube.com/watch?v=64eq5NFrzgI

1.5   Start building your library

You can now start importing references with the help of the "save to Mendeley" button in your browser. You can do this from a long range of Databases, for example Scopus, Web of Science, IEEE, 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 Scopus:

If you have a search with few 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 71,137 articles! refine your search, or make a selection of articles to import.
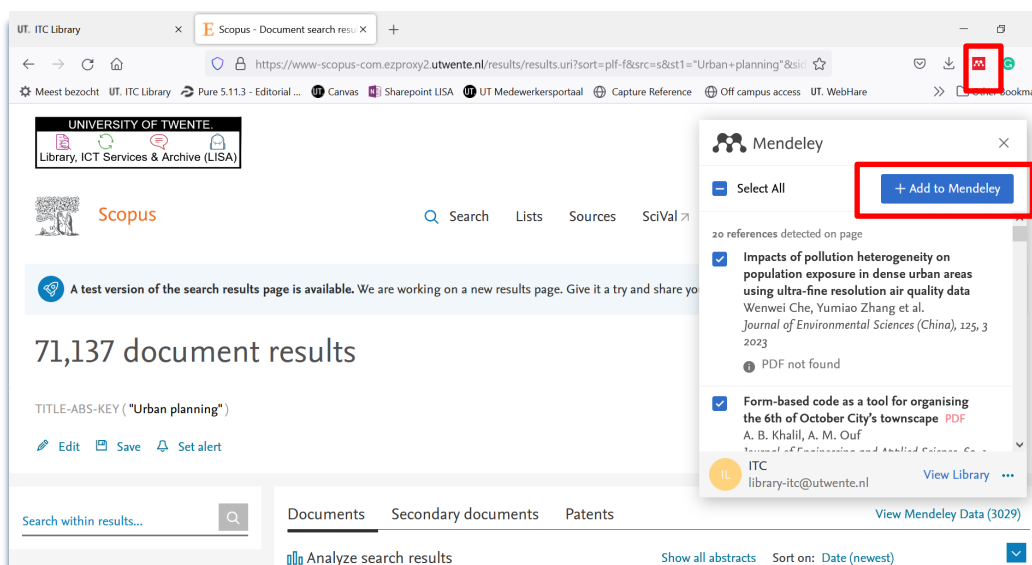
From other databases:

To Save references in your Mendeley library from other databases like Web of Science, IEEE, ACM, etc. you can take the same steps as described for Scopus.

When you are not looking at the search results in a database, but for example at a record of a specific article, you can also use the Mendeley button in your browser, this will however only import the article of the record you are looking at. (*in some databases you will also get the option to import references of the article mentioned in the record.)

*When you are looking at the PDF of the article itself, the Mendeley button generally does not work. Go back one step to the database record page of the article.

Adding PDF's to Mendeley
PDF's are automatically imported with the reference, when you use the Mendeley Web Importer. However, sometimes Mendeley is not able to import the PDF with the reference.

In that case you can download the PDF manually and drag and drop it to Mendeley:
- Open the folder where your PDF's are stored in a new screen, now drag-and-drop the PDF's from the folder to the middle pane of the Mendeley desktop library.
- Mendeley will automatically create a reference for the PDF's.
You can also do this for PDF's you had already stored on your device.

When you already have a reference in Mendeley, another option to add the PDF is to attach it to the reference in Mendeley. To do this, select the reference and scroll down to files in the metadata menu:
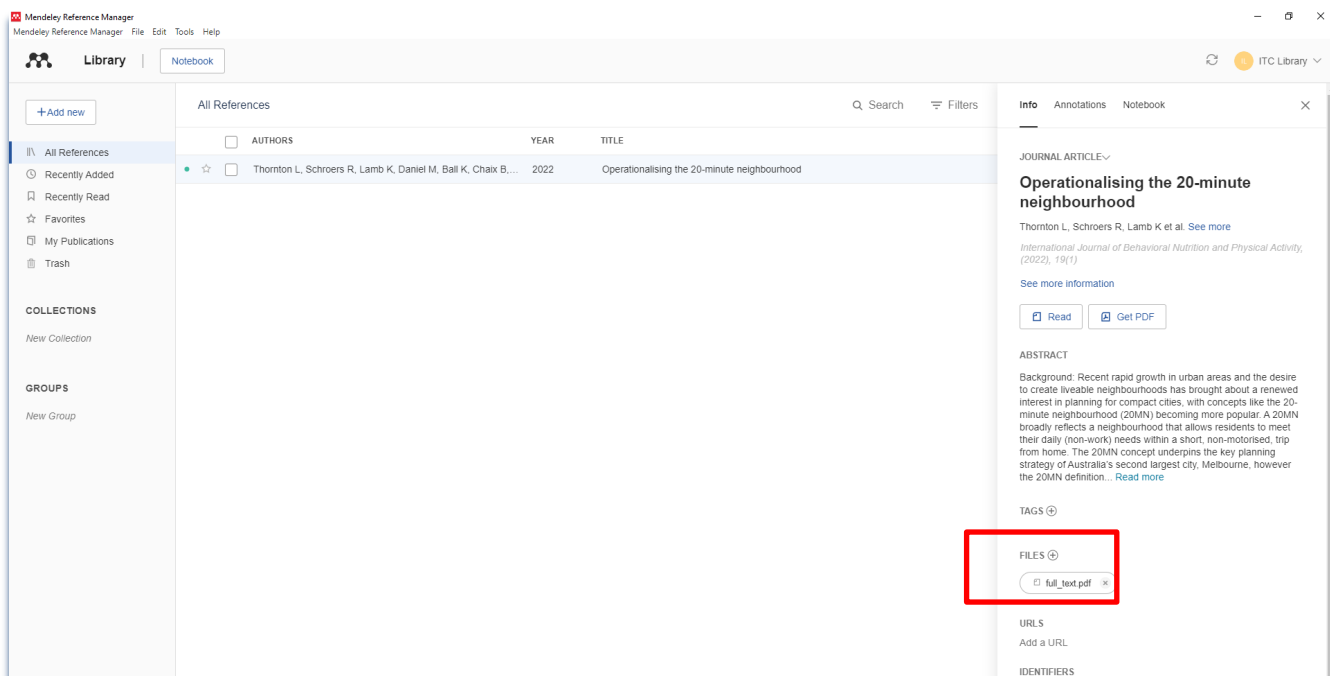
Do it yourself record

If importing information via the Web Importer or PDF does not work, use the "Add entry manually" option.
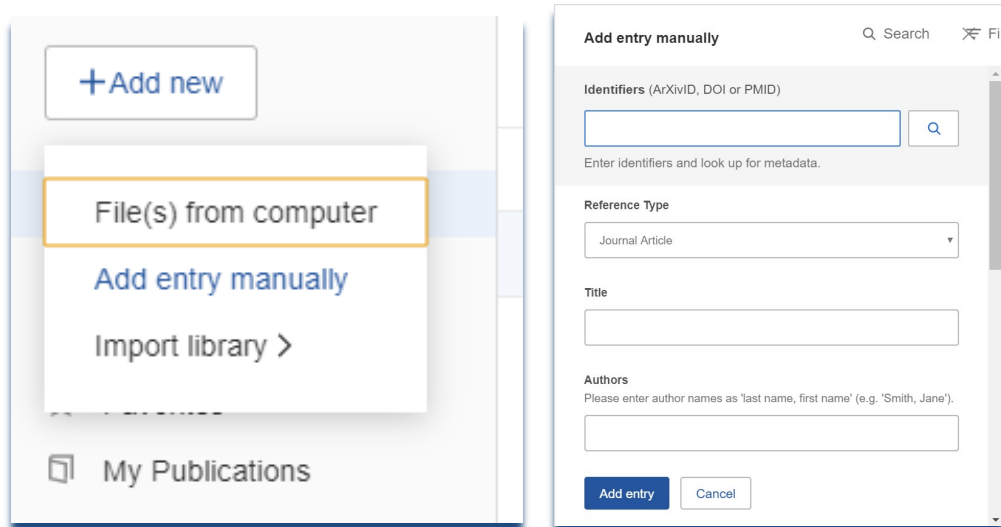

You can now easily copy/paste all the information from the source into the relevant Mendeley reference fields.

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Just a small example, to remind you: **Always check your imported reference information !**

See text below. The same article imported from different sources:

Ju-Sung Lee, T. F. A. L.-Z. B. H.-M. F. S. I. L. A. V. J. G. P. Z. S. and D. C. P. (2015). The Complexities of Agent-Based Modeling Output Analysis. *2015:55:2*.

Lee, J. S., Filatova, T., Ligmann-Zielinska, A., Hassani-Mahmooei, B., Stonedahl, F., Lorscheid, I., ... Parker, D. C. (2015). The complexities of agent-based modeling output analysis. *JASSS, 18*(4). http://doi.org/10.18564/jasss.2897

## 1.6   Inserting citations and references in Word

Go to the "references" tab in Word:
- 	click on the Mendeley Cite button.
- 	You will now see your complete list of reference and can select one or use the search bar to find the reference you want to insert in your work.
- 	Place your cursor on the place you want to insert the citation and click on "insert citation" at the bottom of the menu.

Citations:

When you start writing a document Mendeley will only add the citation without reference to your word document.
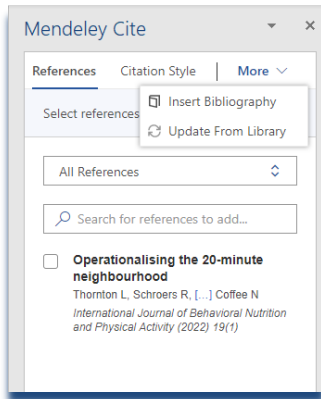
References:

To add references to your document, first place the cursor in the Word document at the spot where you want your reference list. Next click "More" and "Insert Bibliography".

From that moment on, Mendeley will add or remove the corresponding reference for any citation you insert or remove in your document. ***NOTE:** this means you only have to click on "Insert Bibliography" once!

Chapter 1. ………

(Wielstra et al., 2012)

REFERENCES

Wielstra, B., Beukema, W., Arntzen, J. W., Skidmore, A. K., Toxopeus, A. G., & Raes, N. (2012). Corresponding Mitochondrial DNA and Niche Divergence for Crested Newt Candidate Species. *PLoS ONE*, *7*(9), e46671. http://doi.org/10.1371/journal.pone.0046671

1.7 Change your citation and output style

Go to the "Citation Styles" tab in the plugin to see which reference style is used and to change it into a different style. Select the reference style you want and click on "Update citation style". This will immediately change the style of referencing in your whole document.
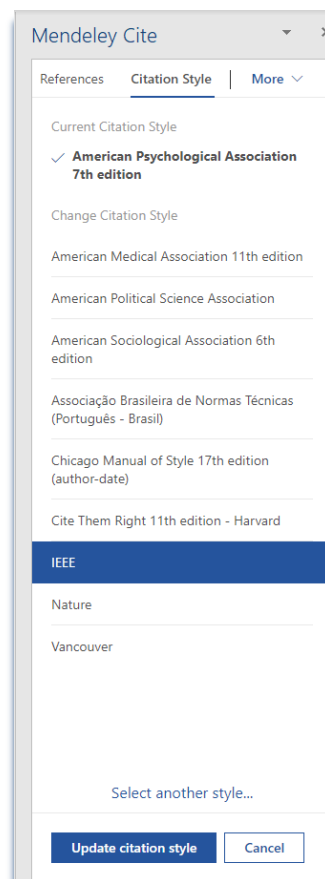
## 1.8   Edit your citation

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 you get an "Edit citation" option in the plugin. Select the citation you wish to edit and the screen changes.

You can now add page numbers or remove the author names from the brackets by "Suppress author". The Prefix and Suffix options add text before the author and after the year.

Later on it is possible to undo this by following the same steps and removing your edit or unchecking the box.
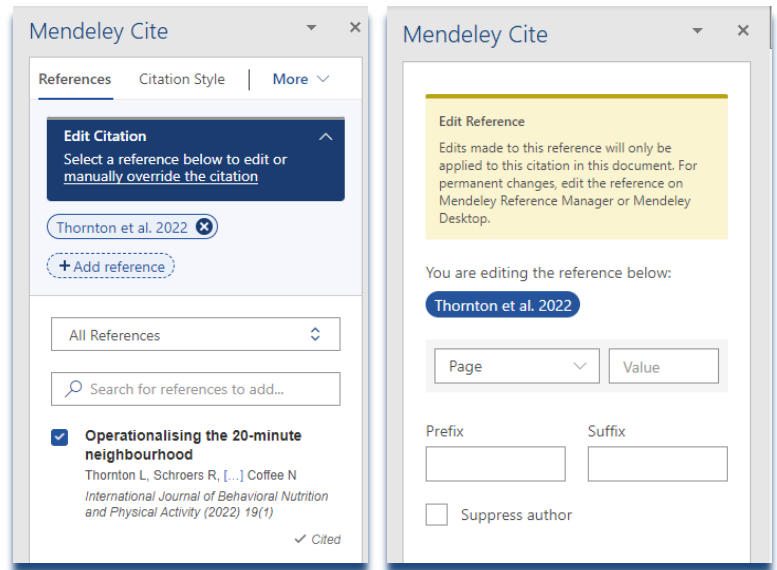
1.9   Merging citations

To add a reference to a citation, click on the citation and click on the "+ Add reference" button or simply select another reference in the list and click on "Save changes". The citations are now merged into one citation for multiple articles.

2   Mendeley things to know

2.1   The DOI saves the day

If you have trouble importing your references, try to find the DOI (Digital Object Identifier) of your article, put it in a New Reference ("Add new" → "Add entry manually") and the Lookup function will complete your reference!
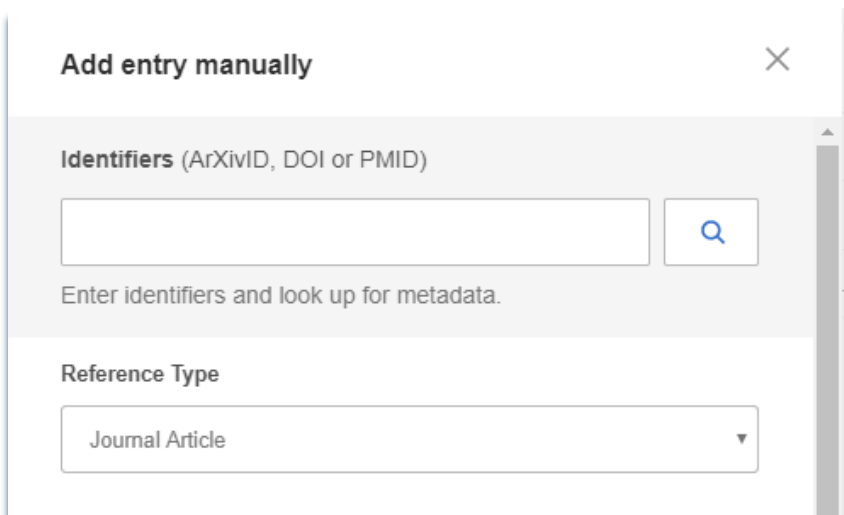
3   Organizing your Mendeley library

3.1   Import other libraries

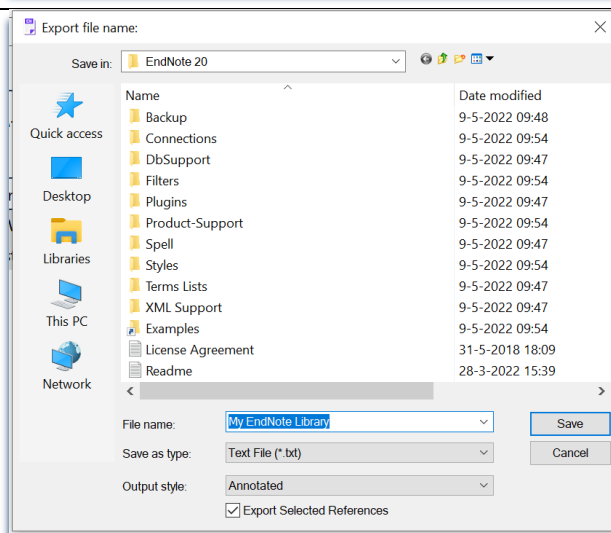|	
Endnote or other libraries can be imported, into Mendeley desktop library, take the next few steps:	
Starting from Endnote: 1. Select all references 2. Go to "File", and "Export"	
3. Select the location for saving. 4. Choose a file name. 5. Save as type: "XML" 6. Choose the output style "Annotated". 7. Tick the box: "Export selected references" 8. Save	
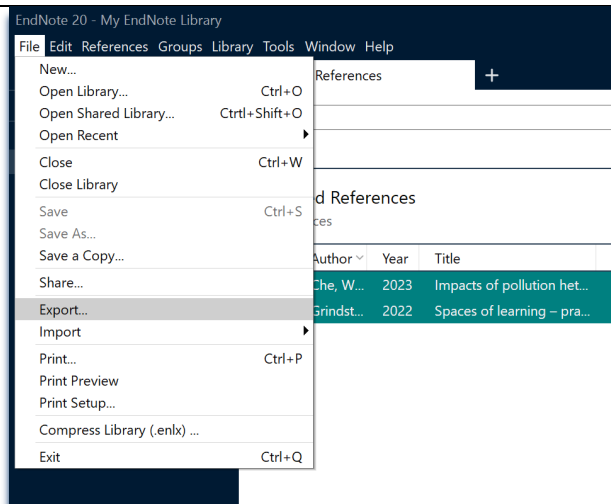
Importing in Mendeley 1. Go to "Add new" 2. Click on "Import library" 3. Select the right filetype 4. Search for the saved file 5. Import to Mendeley * Note that only References themselves can be imported. PDF's are not imported. That is why it is sometimes easier to drag and drop PDF's from a folder into Mendeley instead of making an export from another reference manager.	
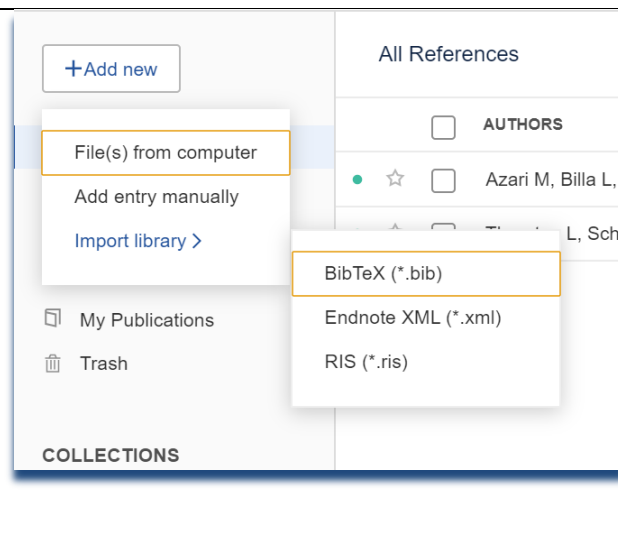
3.2   Create folders & sub-folders and search the full-text of your library
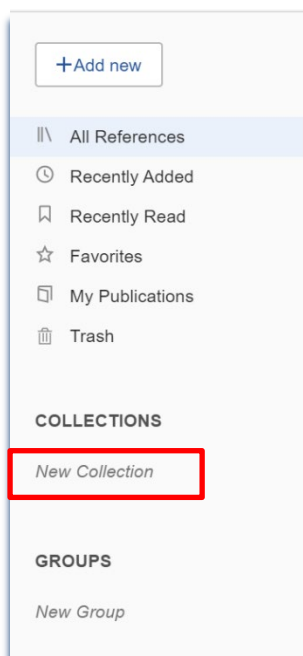
Click on "New Collection" in de left hand pane to create and name folders.

When you created folders, you can drag and drop references into the folders. This will create hyperlinks to the actual reference in every folder you place the reference into. This way changes in a reference will synchronize over all folders.

Go to "All References" to see the full overview of all references you stored in Mendeley.

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, title words, authors in the top right "Search" option to find documents instantly as you type. The search includes global notes and tabs by default. You can also use the filter option to filter on Authors or Tags by clicking on "Filters".
*Make sure to "Clear filters", when you want to remove the filters.
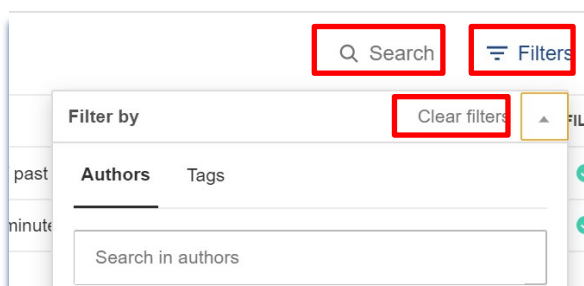
You can also search inside PDF's you have attached to a reference. To do this, double click on the reference and the PDF will open. On the right side in the menu bar, you will find the looking glass that will allow you to search the PDF.

3.3   Create a group
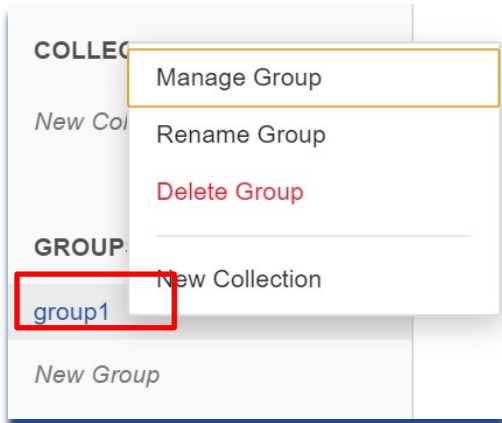
In Mendeley you can make private groups to share references, annotations and PDF's when working on a joint project. This works the same way as making a new folder (collection).

When a new group is made, you can right click on the name of the group to get additional options in a menu.
Choose "Manage group" to invite people by e-mail to your group folder and start working together.

Drag references to your group to share them with your group members. When you already made annotations in the PDF, they will **not** be visible for your group members.

When you open the PDF in the group folder itself, you can write annotations and make highlights which **will** be visible to your group members.

3.3   Read, mark, add sticky notes to the saved articles and create a Notebook.

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

To highlight, select a part of the text. Immediately a pop-up saying "Highlight" will appear. You can also change the colors of the highlight in the menu bar on top.

To place a comment in the text, click on the comment button in the menu bar, then click anywhere in the document where you want to place a comment. A pop-up will in which you can write your comment. On the left side you can see an overview of your comments in the PDF's by clicking on the "Annotations" tab. Here you can also place "General notes". These last ones are also searchable via the general search option.
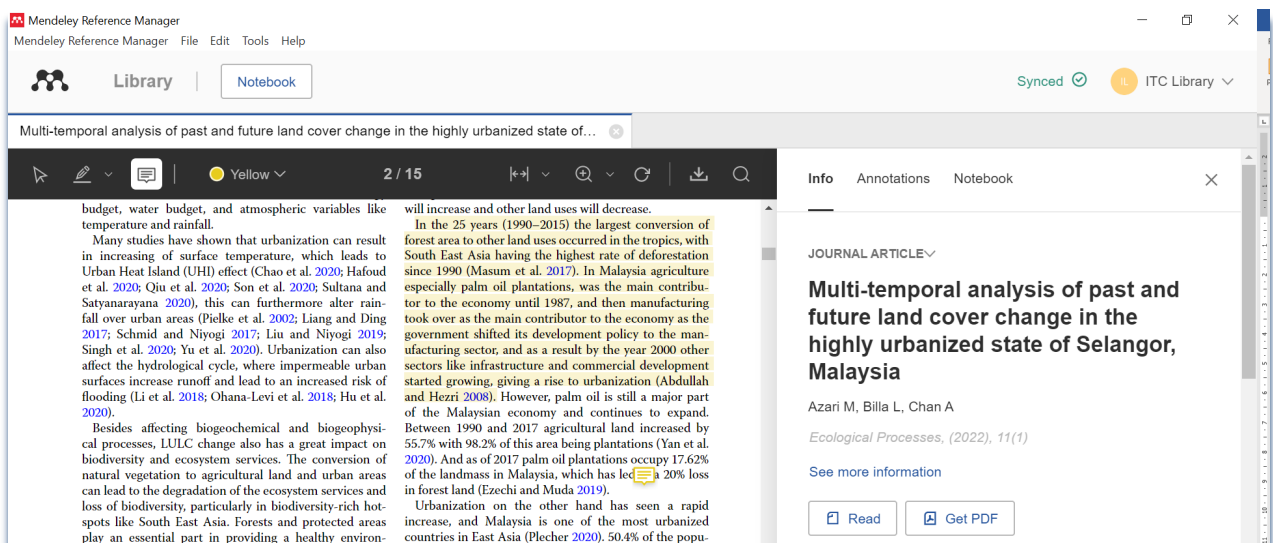
Highlighted parts of the text can also be placed in the "Notebook". Click on a highlight and choose "Add to Notebook".
The first time you will have to create a "new page" to add quotes to your notebook.
You can then write text yourself, in between quotes from different articles on the same page and start filing your notebook.
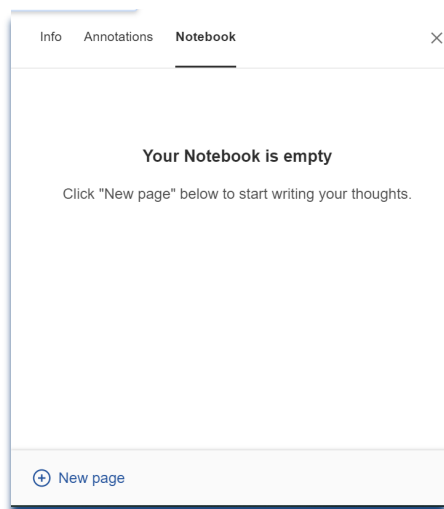

4 Document-types and output-styles

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, Scopus 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 all 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 not 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.
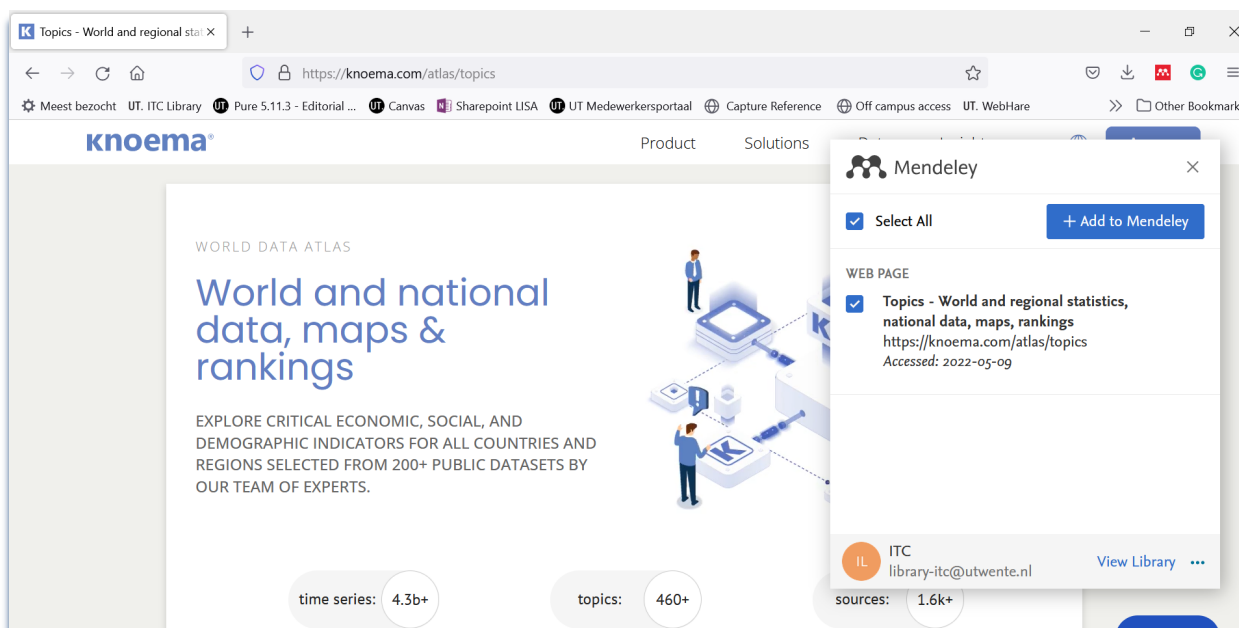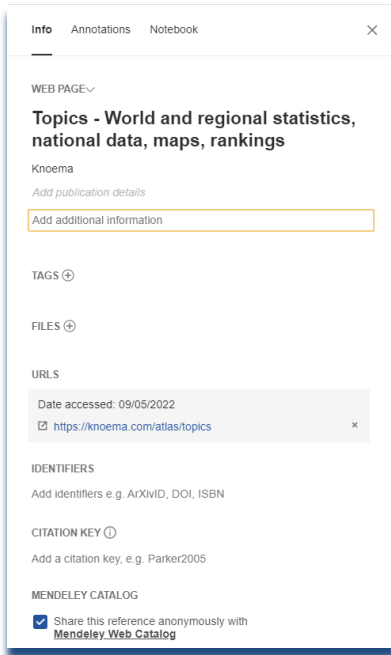
Citation with organization as author:

(Knoema, n.d.)

Knoema. (n.d.). *Topics - World and regional statistics, national data, maps, rankings.* Retrieved May 9, 2022, from https://knoema.com/atlas/topics

Citation without organization as author. In APA style, the title gets inserted in the citation.

(*Topics - World and Regional Statistics, National Data, Maps, Rankings,* n.d.)

Topics - World and regional statistics, national data, maps, rankings. (n.d.). Retrieved May 9, 2022, from https://knoema.com/atlas/topics

Corporate authors – organizations as authors of publications

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.

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. Use both 'Book' as record type for these publications in Mendeley.
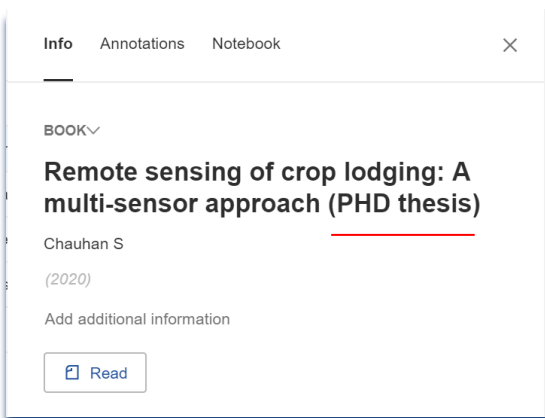
4.2 Output styles

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.

Online style library for other output style examples https://csl.mendeley.com/searchByName/

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 Numbered style for example "Nature" where each citation is just symbolized by [3] for example instead of the author's name.

> 1
>
> 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 LaTeX

5.1 Export from Mendeley to BibTex
Open Mendeley, and select references that you would like to export to BibTeX. Click "Export" at the bottom and choose "BibTeX (*.bib)" as output type. Or go to "file" and "Export All". Save to the same location as the LaTeX file.

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.

\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 Mendeley containing your exported references.

 When you use Overleaf, you can use the Mendeley plugin in Overleaf to insert your references.

6   Mendeley online

Next to the desktop version, you can use Mendeley online. This serves as backup and can act as your work platform when you do not have your 'desktop computer' at hand.

It looks and works the same way as the Reference Manager does and your references and PDF's are automatically synchronized to Mendeley online.