Getting Started with Mendeley

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Last updated: August 2009
www.mendeley.com

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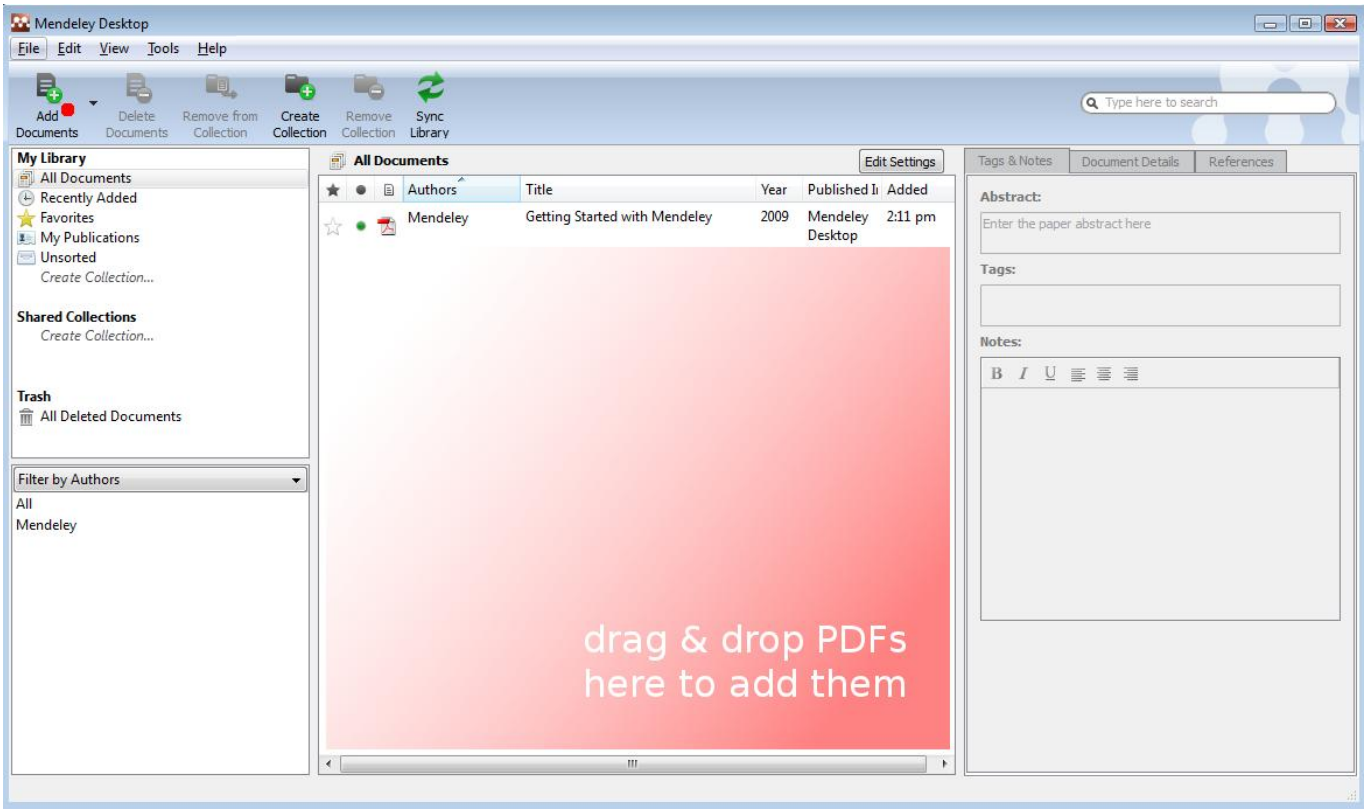
1. Creating your library

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 (marked red below). 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** collection for manual verification.



Import/export BibTeX, RIS, and EndNote files

Switching from other reference management software to Mendeley is simple, just select:

File → Add Files

to **import** BibTeX, RIS, and EndNote XML alongside PDFs.

You can also export your reference database in those formats from Mendeley, just select

File → Export

and select your preferred export format.

Document details lookup (Crossref, PubMed, and ArXiv)

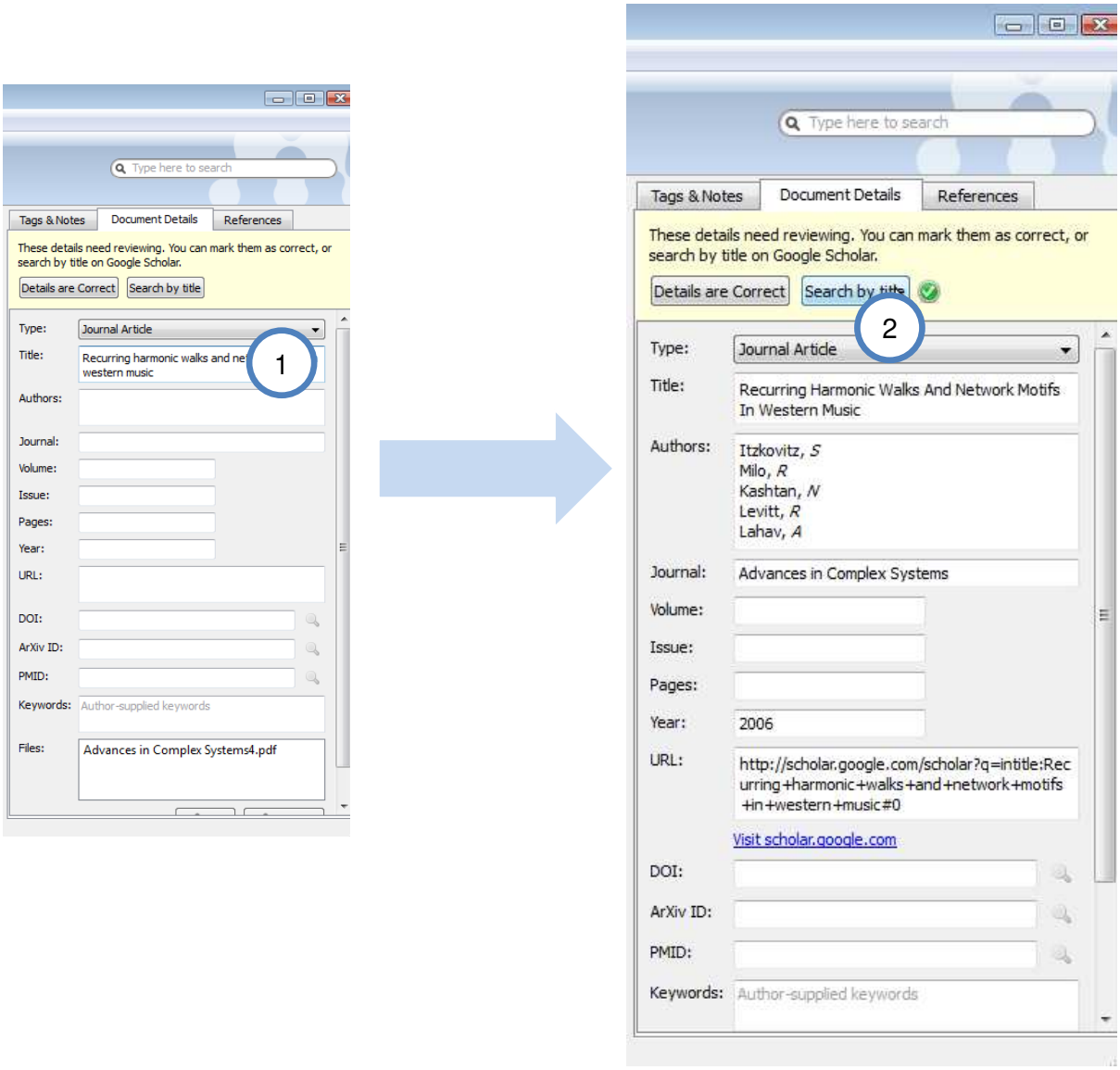
You can also lookup document details from Crossref, PubMed, and ArXiv. Just fill in the document ID in the respective field and click the magnifying glass icon next to it to get the details for those documents. These fields are located in the **Document Details** tab.

Google Scholar Search

You can lookup document details with Google Scholar in Mendeley:

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

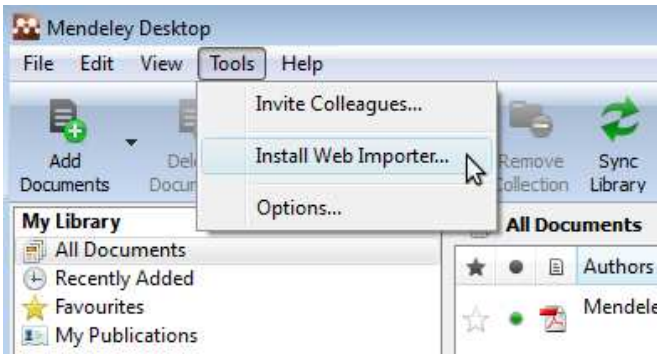
and Mendeley will try to complete the missing data from Google Scholar. (Note: The lookup works only for imported PDF files and not for manually added entries.)



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:

Tools ➡ Install Web Importer…

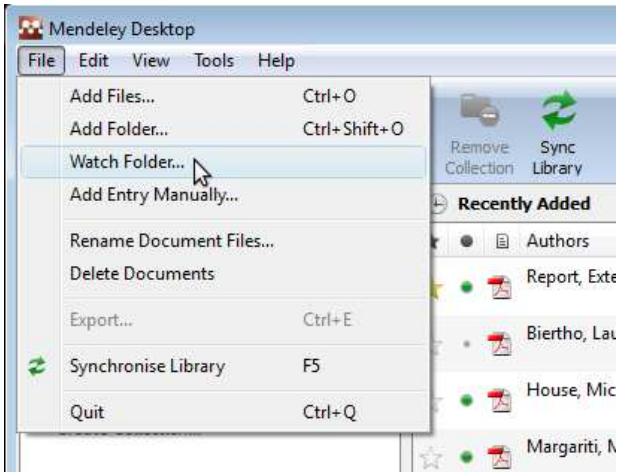


- ACM Portal
- Amazon
- APS
- APA PsycNET
- arXiv
- CiteseerX
- CiteULike
- Copac
- EBSCO
- Google BookSearch
- Google Scholar
- IACR ePrints
- IEEE Xplore
- IngentaConnect
- ISI Web of Knowledge
- JSTOR
- NASA ADS
- PLoS
- PubMed
- RePEc
- ScienceDirect
- SpringerLink
- Wikipedia
- Wiley InterScience
- WorldCat
- Zetoc

… and growing.

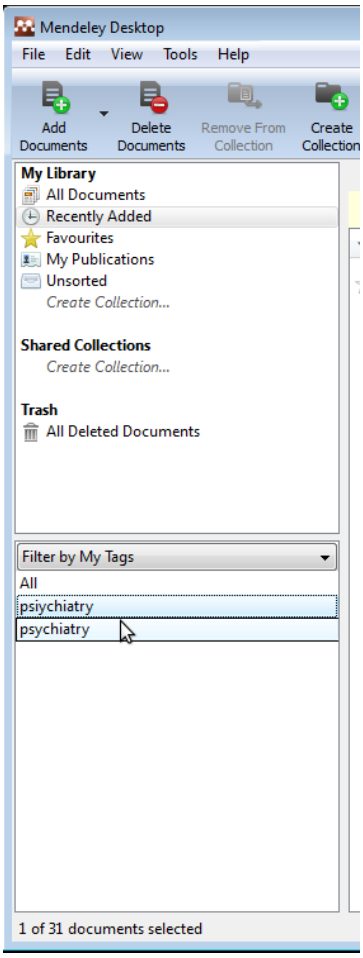
Watch folders to automatically add PDFs

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.



2. Managing your documents and references

Merge duplicate author names, tags, or publications

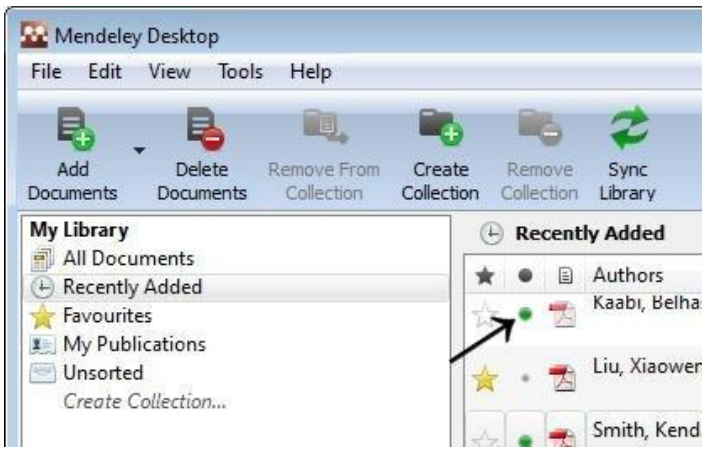


In the filter by authors/tags/publications pane, click a name you recognize has been duplicated or is incorrect, and **drag & drop** it onto the correct one to rename it.

E.g. if I have two documents tagged "psychiatry" and "psiychiatry", dragging the latter one onto the former will rename the incorrect entry.

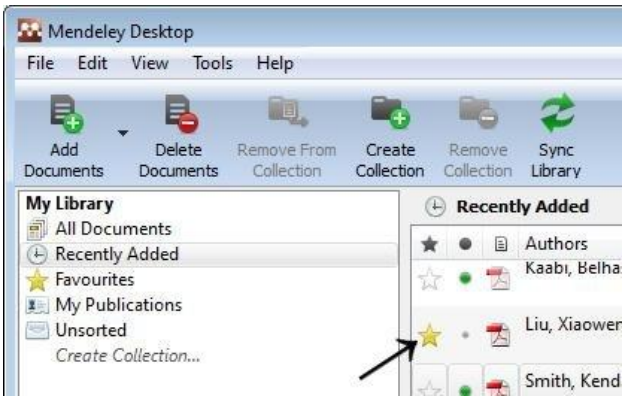
Documents can be marked read/unread

Keep track of your unread papers. When you add documents to Mendeley, they are marked unread using the 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.



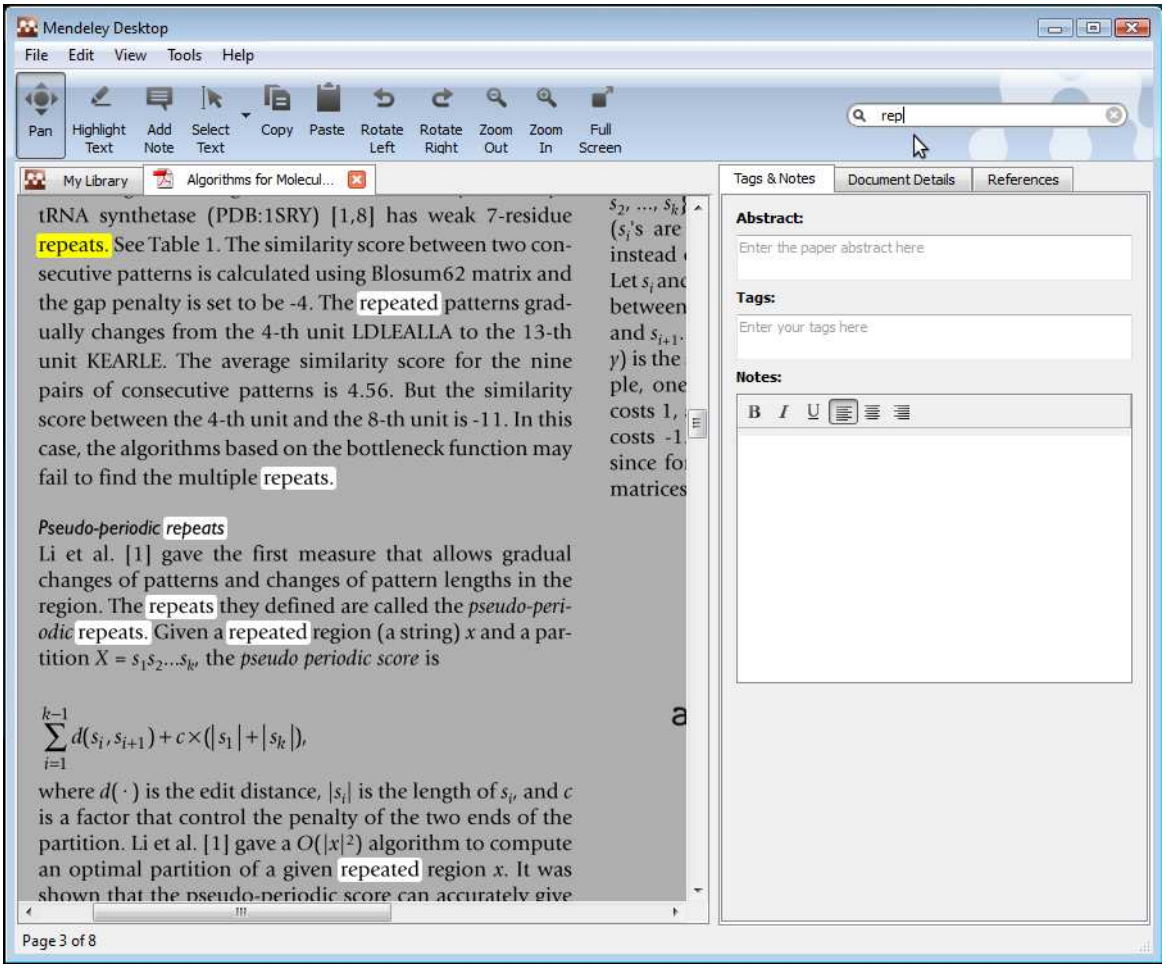
Favorites

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



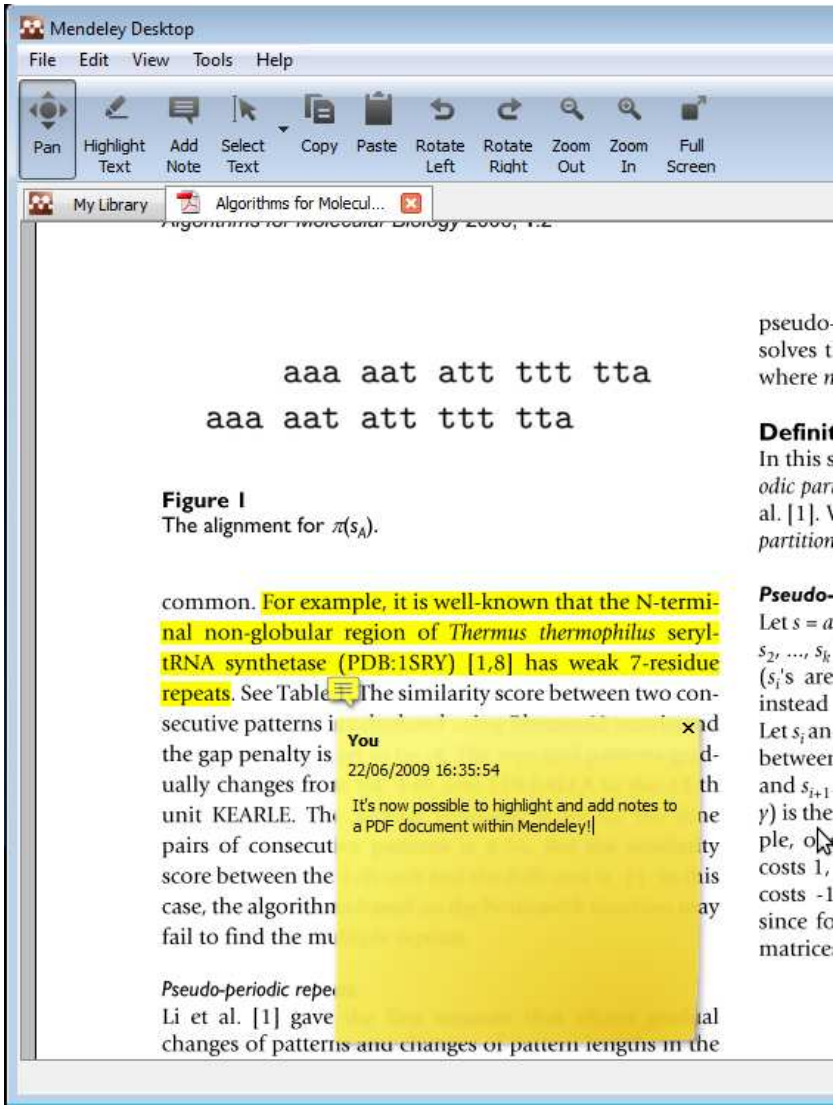
Search as you type

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



Annotate PDFs

You can add highlights and annotations to documents in Mendeley's PDF viewer. Click on **Highlight Text** or **Add Note** to get started. In order to share these annotations you will need to export a PDF (please note that your annotations won't appear in the PDF document unless you export them).



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)

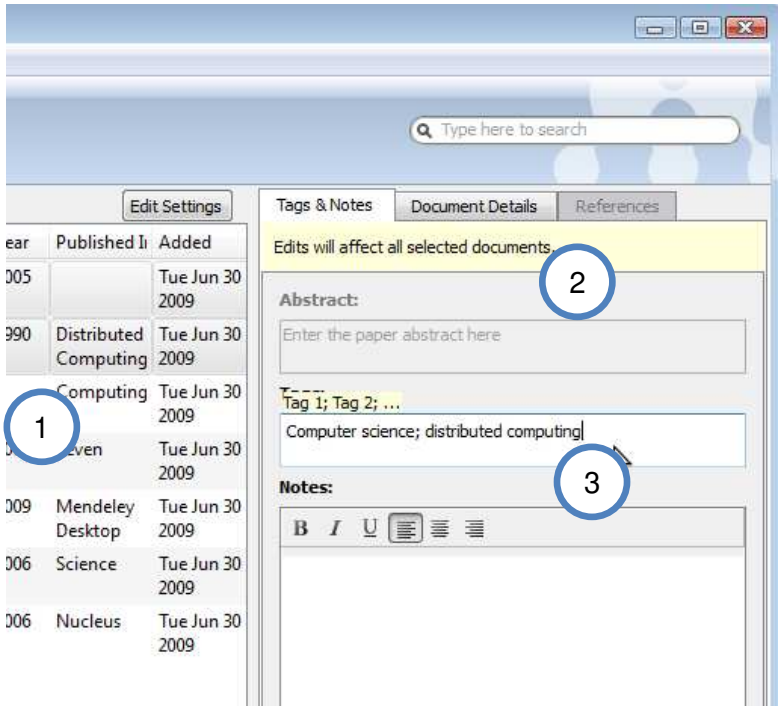
Tag and edit multiple documents at once

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 the example below the entered tags will be applied to all selected documents.



File Organizer

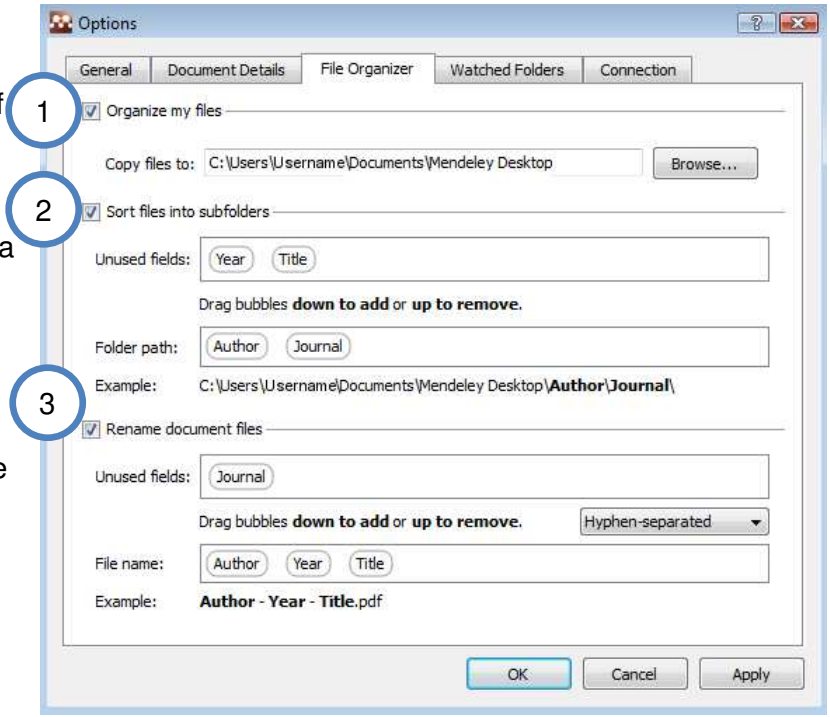
Mendeley's file organizer can automatically rename your PDFs and file them in a clear folder structure, making it easier to find your files outside of Mendeley. You can find it here:

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 to 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



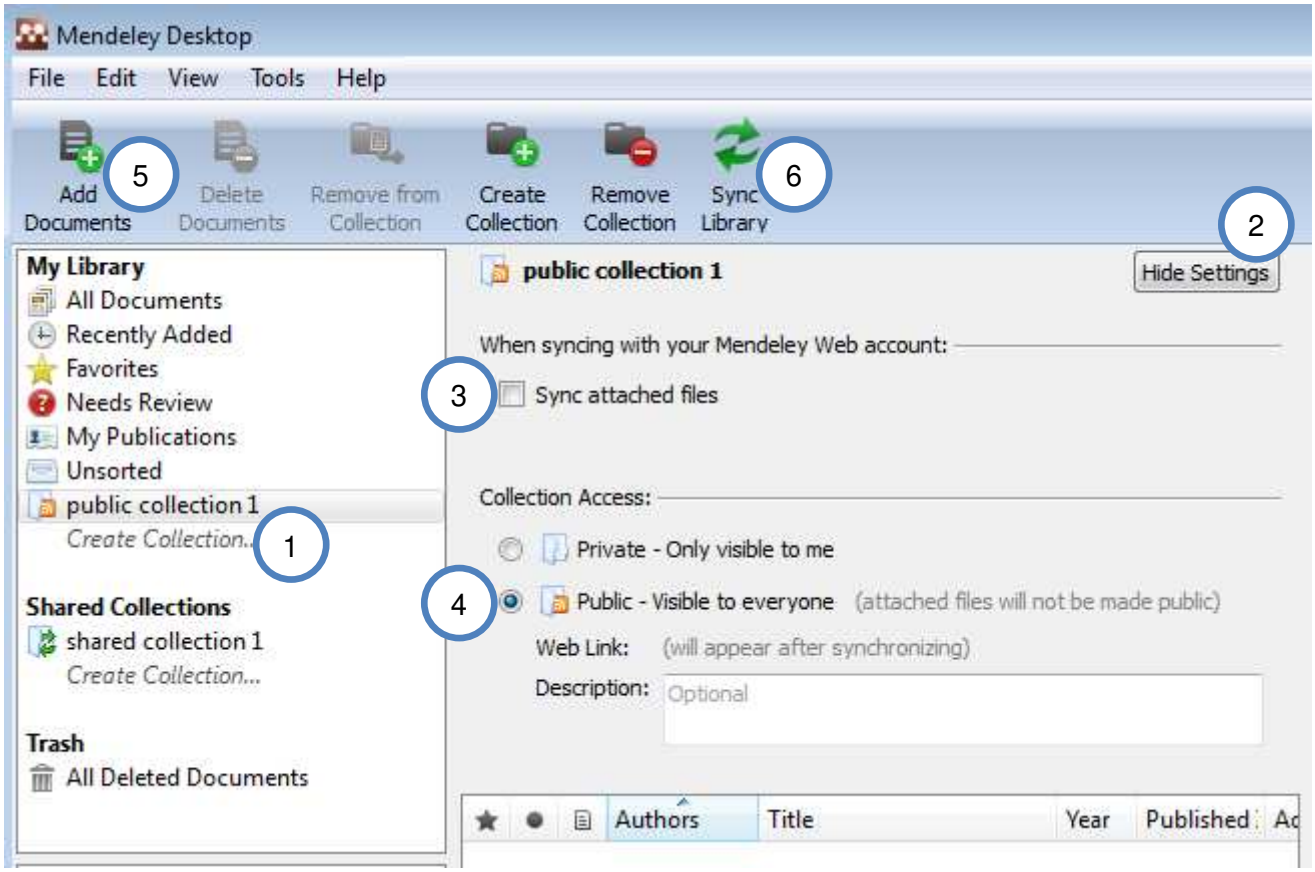
3. Sharing and citing references

Public collections (reading lists)

Public collections allow you to publish a reading list of references. The public collection behaves like a feed, so you can share a list of documents with subscribed users and over the web:

1. **Create Collection** and type name
2. **Edit Settings** (next to collection name)
3. (optional) Tick **Sync attached files** if you want to synchronize your PDFs, so that you can have access to these files privately on Mendeley Web (but they will not be made publicly accessible)
4. **Set collection as public** so users can see the public collection on your profile on Mendeley Web
5. **Add Documents** to collection to publish them on Mendeley Web
6. **Sync Library** to make your collection visible on the web. Mendeley will then generate a Web link for the public collection which you can share with others.

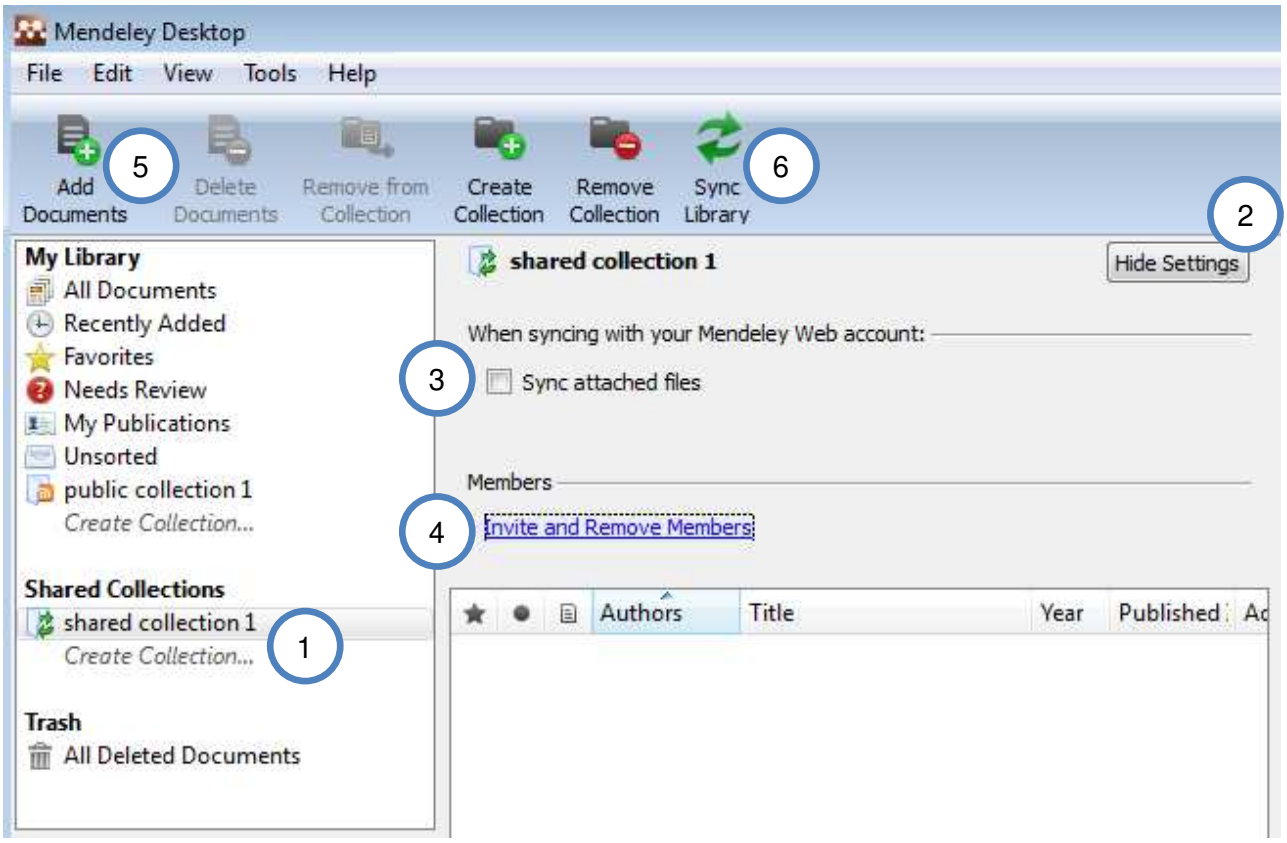
Note: If you have subscribed to someone else's public collection and make changes to it or the document details you receive, the creator will not see your changes. In order to make changes visible to all subscribers of the collection you will need to create a shared collection, instead of a public collection.



Shared collections

Shared collections contain documents which you can share with up to ten participants. This is a convenient way of tagging documents collaboratively and creating a shared literature collection between research colleagues.

1. **Create Collection** and type name
2. **Edit Settings** (next to collection name)
3. (optional) Tick **Sync attached files** if you want other members to have access to any attached PDFs
4. **Invite Members** to the shared collection from your contacts list
5. **Add Documents** to the collection to share with members
6. **Sync Library** to apply the changes

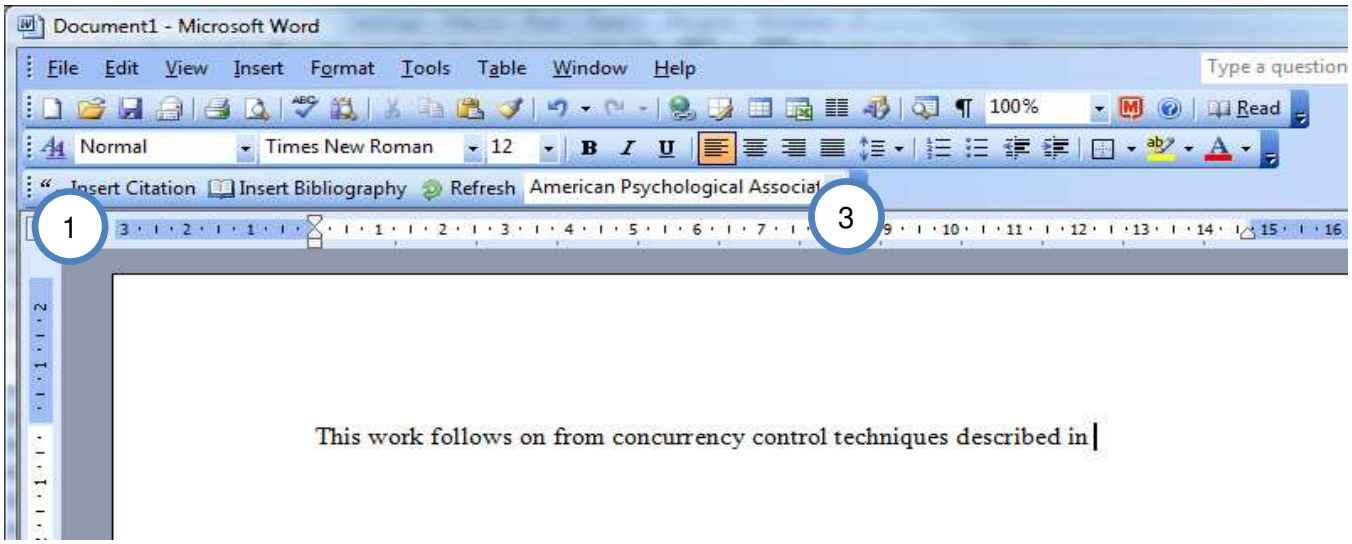


Word and OpenOffice plug-in

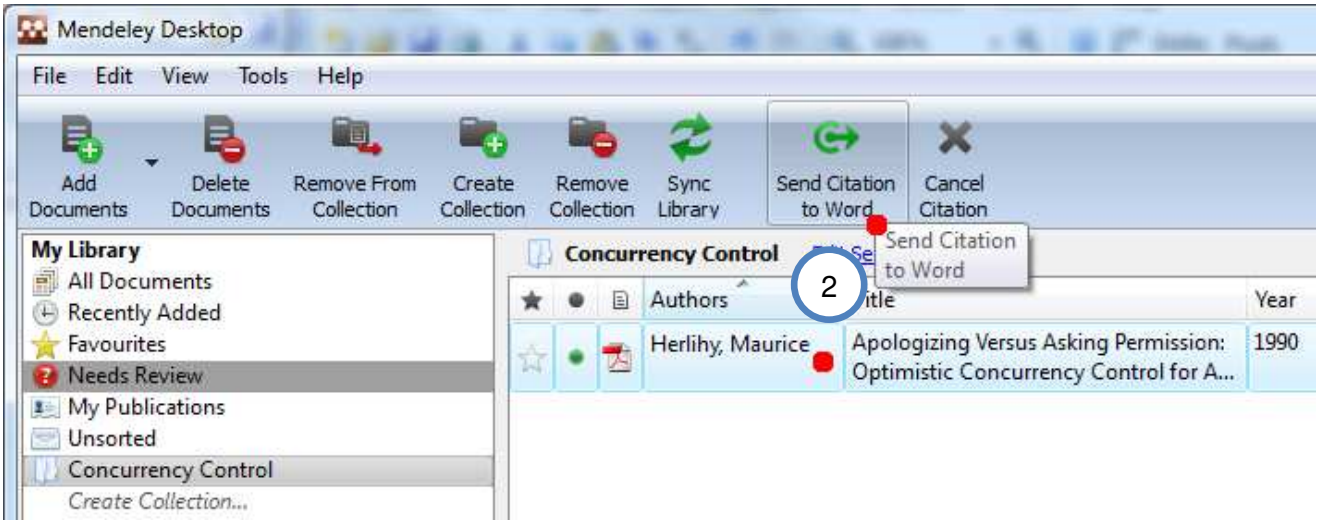
Once you have your documents in Mendeley, you can cite and reference them within Word and OpenOffice with ease. The Mendeley Word & OpenOffice plug-in integrates Mendeley into these word processors. Once installed you will have tool bar buttons that will allow you to cite a document, generate a bibliography, or manually edit any entry, saving you time and effort when you write.

Currently the Word plug-in is only available for Windows. Mac support is coming soon.

When you are creating a paper and you want to cite a document from your Mendeley Library:

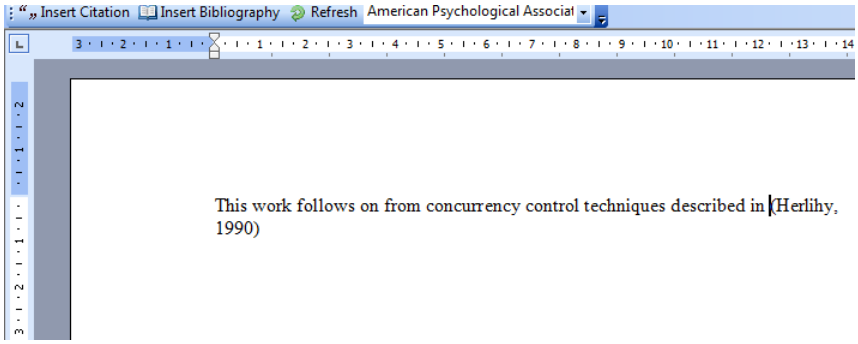


1. Click **Insert Citation** in the Mendeley tool bar
2. **Select the document** in Mendeley Desktop, and click **Send Citation to Word**. You also can cite multiple documents. Just hold the Ctrl key (or the Cmd on Mac) and left click the documents you want to cite.
3. Select the **citation style** in the drop down menu in your word processor

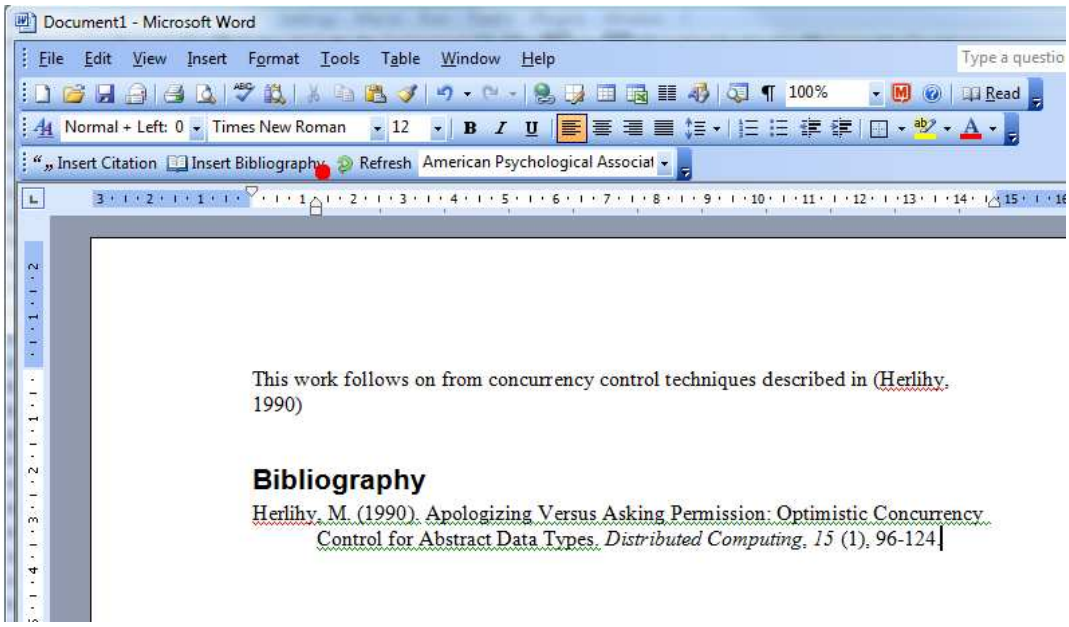


continued overleaf...

This will now **send the citation to Word:**



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



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

and 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 currently selected citation style will be added there.

4. 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