

# Mendeley Handout

## 1. What is Mendeley?

Mendeley is a **free reference manager and academic social network** that can help us organise documents and references. Mendeley offers a **desktop application** AND a **web library**. Since it is cloud based, it can work across devices. There are also **Apple and Android apps**. Mendeley can also help us **collaborate** with other researchers online by working together in groups.



## 2. Downloading Mendeley software

Go to <https://www.mendeley.com>, click **Create a free account** to sign up. Enter your email, name and set a password. Click **Download Desktop App** to download the desktop application. Follow the instructions.

Both **Mendeley Desktop** and **Mendeley Web** Libraries look similar. Both have three panes. The far left pane has various folders where you create, add and organise resources. Whatever folder or section is selected there, appears in the middle pane. The far right pane displays article details for viewing and editing each reference.

Tip 1: Maintain a single library.

Tip 2: Use Mendeley Desktop most of the time because it has many features which are not available in Mendeley Web

## 3. Importing Documents

a. **Drag and drop**. Simply pull PDF files or folders into the centre pane and the references and documents will be added to Mendeley.

b. **Select files/folders** from your computer using the file menu and add them to Mendeley.

c. **Add references manually**. Under Add, select Add References Manually. Choose the type of document you have and then fill in the details.

d. **Use the Web Importer**. From Mendeley Desktop, click Tools in the menu and select 'Install Web Importer'. Then when you find an article you want to add, simply click the Mendeley button and it will come up with a box showing what details it has found. Then you can save these to your Mendeley Library.

e. **Literature search in Mendeley Web**. This function may be useful for some subject areas. This search can be found at the top of the left pane.

Tip 4: Take note that the search option in Mendeley Web is **different** from the Mendeley Desktop


## 4. Managing documents

### a. Editing document details

Select the document and the details will appear in the right pane. Correct any details, check the formatting (particularly capitalisation) and add any needed information that is missing. **Add personalised tags** to your documents to categorising them for easy access later.

Tip 5: **Always** check the details after you have added documents into your Mendeley library.

### b. Organising documents

Besides the **default folders**, you can: **create** your **own folders and subfolders** to organize your documents; **mark** documents as read or unread by clicking the little green button next to it; and **star** your favourite papers. The icon  next to the title means that the full document is available for you to view in Mendeley's PDF viewer.

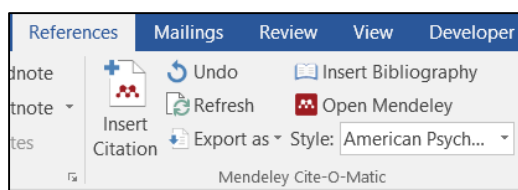
### c. Annotating PDFs

One of the strengths of Mendeley is how it manages PDFs. Mendeley gives you 2G of free cloud storage space. You can open documents in the PDF viewer. Multiple documents can be opened at once. You can **highlight** and **make notes** on your PDFs.

## 5. Generating citations

Mendeley has a **citation plug** which connects to Microsoft Word so that you can add in-text citations as you go and have a bibliography generated for you at the end. To install the plug-in, close Word then from Mendeley Desktop, click Tools in the menu and select 'Install MS Word Plugin'. In Microsoft Word, you can find the Mendeley tools under the 'References' tab in the toolbar. On a Mac it looks a bit different, the plugin looks like a bar that lists the functions of Mendeley. Go to View, then Toolbars, and click 'Mendeley Toolbar' to make it re-appear.

Tip 6: A good knowledge of referencing styles like APA will definitely help.



While working on your Word document, add a citation to your paragraph by clicking '**Insert Citation**'. In the Window that pops up, type in the name of the author, part of the title, or the year. Select the resource you want. You can also click 'Go to Mendeley' to pick an

article from your library.

Add a bibliography by clicking '**Insert bibliography**' in the Mendeley toolbar. Mendeley will then generate your bibliography for you instantly based off of your in-text citations. You can also **change the style** of all of your citations and your bibliography with the click of button, by picking a different style from the drop down menu.

## 6. Syncing

Mendeley securely syncs your library between devices and backs it up online, i.e. Mendeley Desktop and Mendeley Web **update each other**. Your library is 100% secure, and is not visible to anyone else. Click the **sync** button on the desktop to sync to the web.

Tip 7: Always sync. Do not forget to sync before you sign out.



## Help

For help with Mendeley, go to their website. They have several help guides and videos and a Mendeley community to get answers to FAQs <http://community.mendeley.com/guides>.