Essential Mendeley

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Mendeley is a free reference management program, accessible online via a web application, and locally via a desktop application.

All University of York classroom PCs include Mendeley Desktop, and allow installation of the Mendeley Cite-O-Matic plugin for Microsoft Word. To use on University of York office / staff PCs you will need to download Mendeley Desktop from the Software Centre.

Mendeley Desktop is free to download for personal use.

For online help and guidance, please see:

subjectguides.york.ac.uk/skills/reference-management

subjectguides.york.ac.uk/reference-management

This material has been written to be used with Mendeley on a University of York PC. Every attempt has been made to ensure the accuracy of the information provided. However, you may find some minor differences when working with personalised systems.

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1 Overview

Mendeley is a free reference management application. References can be collected in a personalised online library which can be synchronised with a desktop application. A browser plugin allows for quick harvesting of bibliographic information, while a plugin for MS Word allows you to insert citations from your Mendeley library.

Mendeley is free to use, and the desktop application and Word plugin are available on all University managed machines.
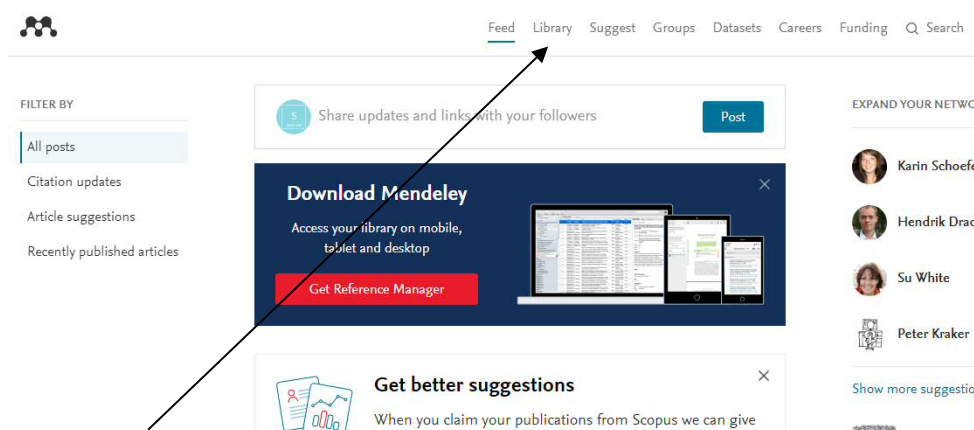
1.1 Registering

- The Mendeley account is not managed by the University so you cannot simply log on using your University username and password.

- You can register using any email address. However, to make use of the collaborative tools it may help other users if you register using your UoY address.

- For security reasons, do not use your UoY password when you register.
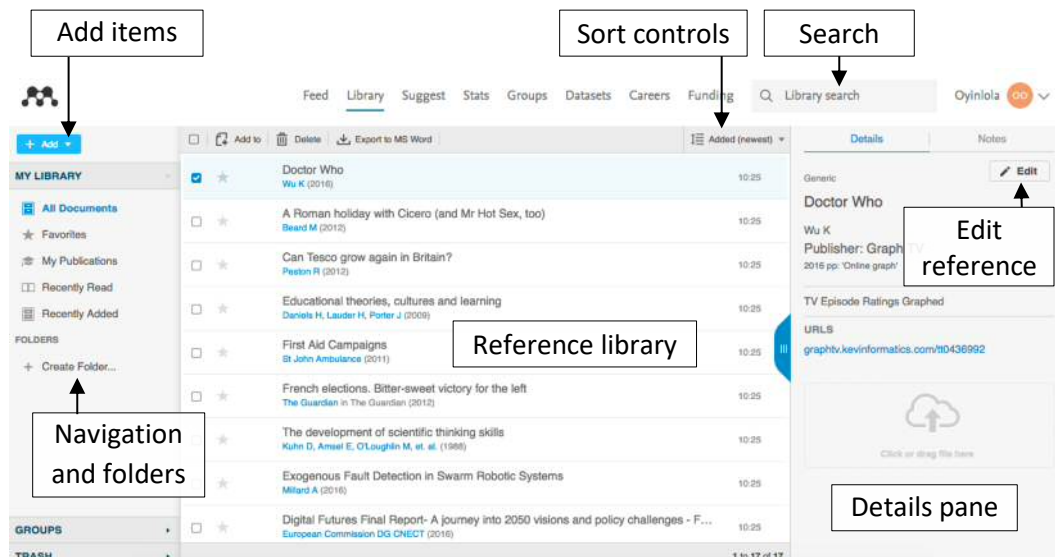
To register:

1. Visit **www.mendeley.com**; click on **Create a free account** and complete the registration process (ignore the link to sign in via your institution). Do not forget to set a good and safe password.
2. On the next page, select your **Field of Study** and **Academic Status**.
3. Click on **Create Account**. By doing this, you are agreeing to their Privacy Policy and Terms & Conditions

1.2 Mendeley Web Library

After logging on to Mendeley Online (and hiding the Getting Started Guide if necessary), you'll be greeted by the Feed page:


The **Library** page allows you to organise and modify any references you collect:

Add items

Sort controls

Search

Edit reference

Reference library

Navigation and folders

Details pane

1.3 **Mendeley Desktop**

As well as the online Library, there is also a Mendeley desktop application. This program is available on all University managed machines, and can be downloaded to your own computer.

To download Mendeley Desktop for your own machine:
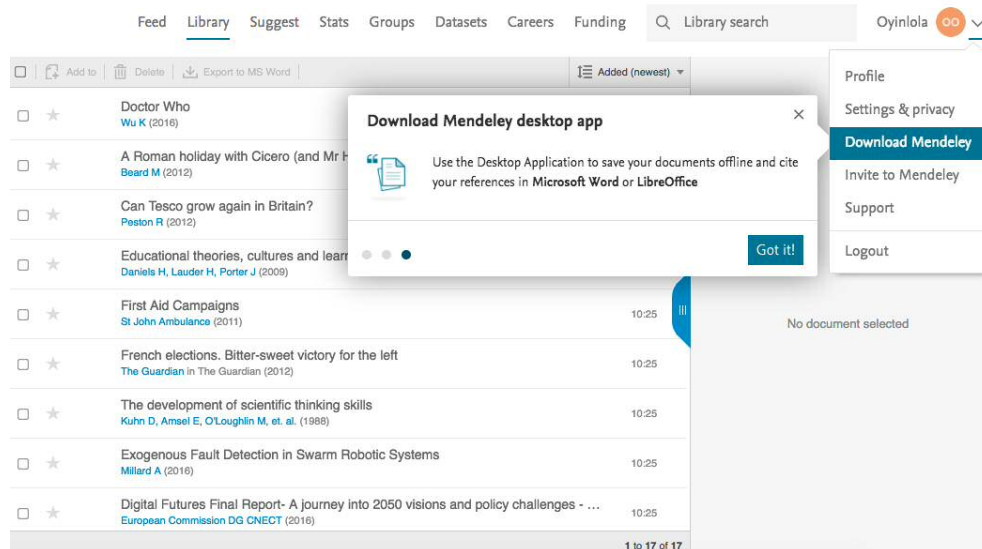
1. From the user dropdown ( ) in the top-right, select **Download Mendeley**.

2. Follow the download instructions.

When you open the Mendeley Desktop application for the first time you will be prompted to sign into your Mendeley account:
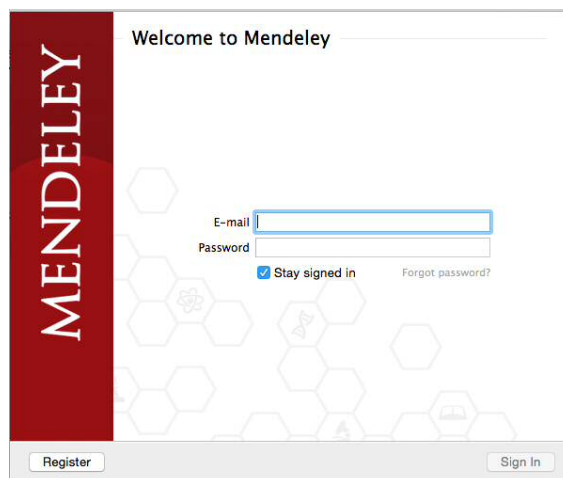
The layout of Mendeley Desktop is broadly similar to that of the online Library:

1.4 Downloading Plug-ins
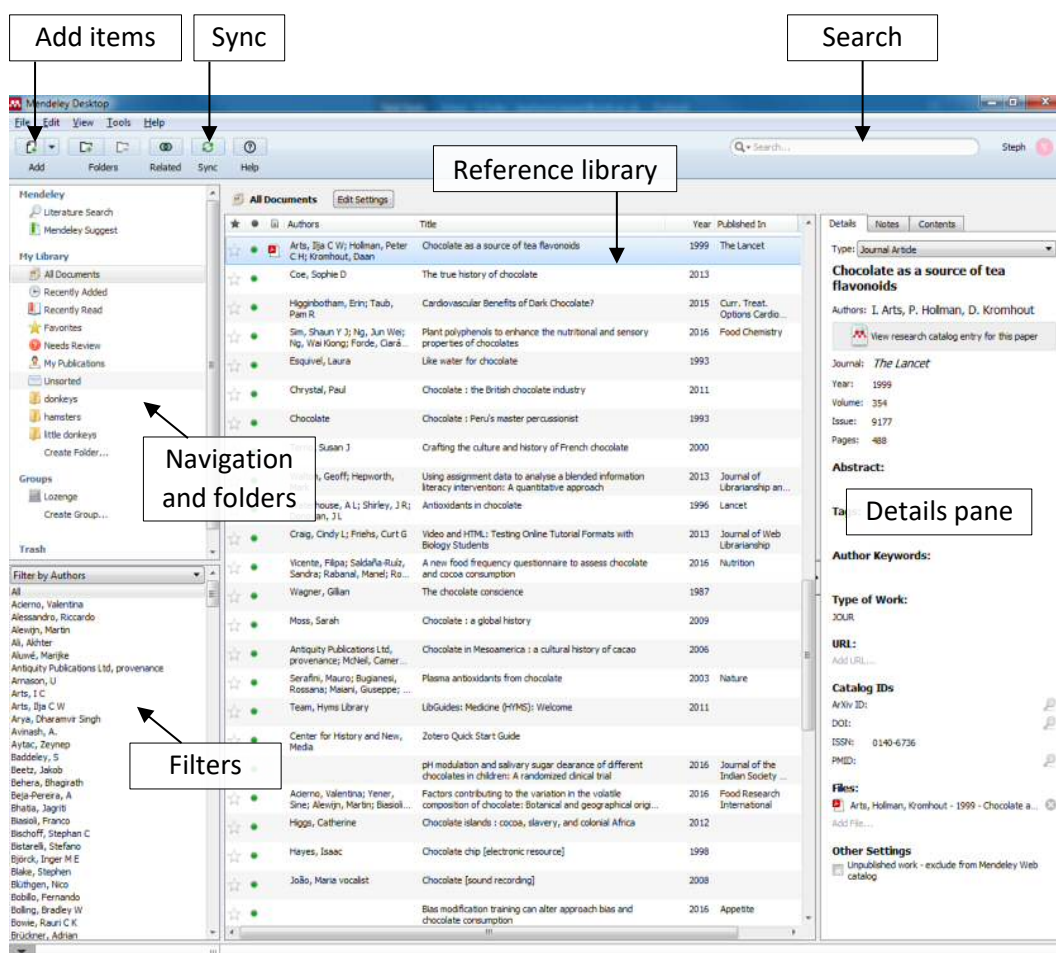
There are two available plug-ins from Mendeley:

- Web Importer: Import papers, web pages and other documents directly into your reference library from search engines and academic databases. Mendeley Web Importer is available for all major web browsers. It can be installed from the Mendeley website: https://www.mendeley.com/reference-management/web-importer

- Citation Plugin (Mendeley Cite-O-Matic): Bibliography creation is made easy with the Citation Plugin. It lets you cite as you write. It is fully compatible with Word (including Word for Mac) and LibreOffice. A guide on using Citation Plugin is available on the Mendeley website: https://www.mendeley.com/reference-management/citation-plugin.

The plugin needs to be installed even on University machines. To install the MS Word Plugin:

- Go to Mendeley Desktop

- University computers will prompt you to install the Citation Plugin. You can also install it by going to **Tools** > **Install MS Word Plugin** (Word must be closed before any installation can be done)

- Once installed, the plugin appears in the **References** tab of Word:
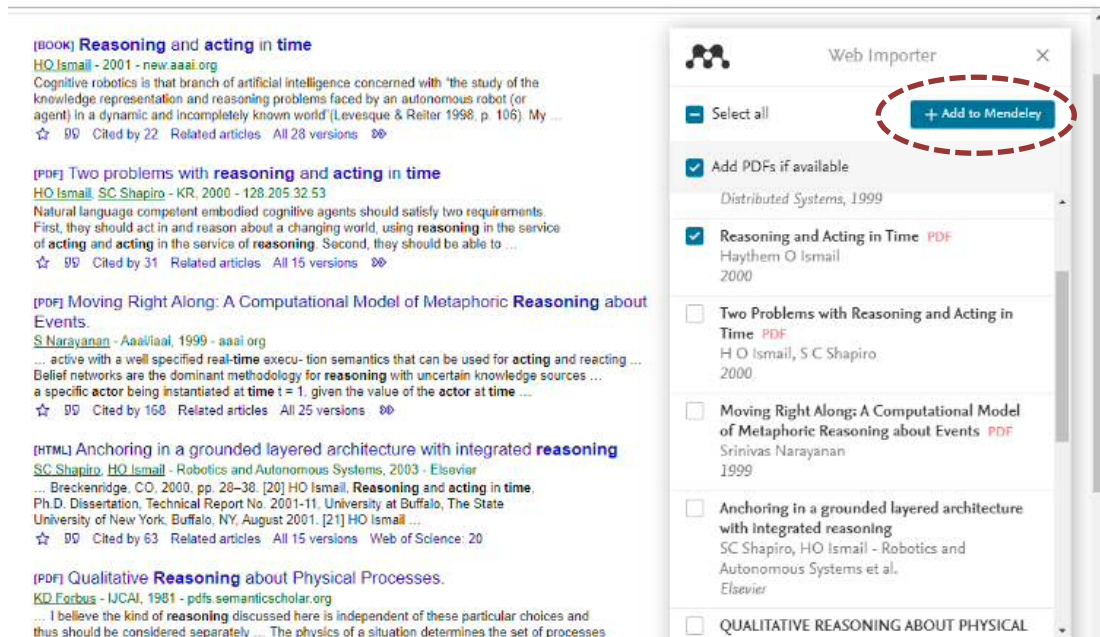
Mac version:

Windows version:
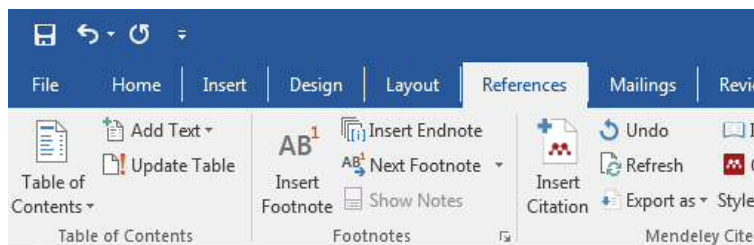
2 Collecting references

2.1 Using Web Importer

Ideally you should aim to collect references electronically, and only use manual entry when no alternative is available. Reference data can usually be acquired from:

- Bibliographic databases

- Google Scholar

- Library catalogues

After searching any of the databases listed above, simply click on the **Mendeley Web Plugin** to display any references it identifies which can be imported into Mendeley Online. Tick the file to be saved and click **Add to Mendeley.**

> **Note**: The Web Importer may not find all the items on the page so you may need to use an alternate method.

To update your Mendeley Desktop library at any point, use the **sync** button to sync with the Web Library.

2.2 Importing from a file

As the Web Importer is not always effective, you may need to export search results. Mendeley can read bibliographic information saved in RIS, Endnote XML, or BibTeX formats.

2.2.1 What to look for

Most databases will include the ability to select several references for export, with a link/button to begin the export.

2.2.2 **Export**

1. Select the Export option and choose an appropriate export format (**RIS** is generally the most consistent option).

2. If asked to choose between Open or Save, choose to **Save** the file to your computer.

   Note: You won't need to keep this file once you've imported it into Mendeley.

2.2.3 **Import**

1. In either version of Mendeley, use the **Add** button in the top left to add files.
2. If you're using the Web version, you'll also need to tell it what file-type to use. Choose the **Import RIS (.ris)** option to import a RIS file containing several references.

2.2.4 **Importing from a PDF**

Some PDFs contain metadata that Mendeley can read and convert into a reference. You can add these using the **Add** button (choose the **Import document** option if using the Web version).

Importing PDFs from folders

In Mendeley Desktop you can also import whole folders of PDFs via the **Add Folder** option on the **Add** button dropdown menu. You can also set 'watched folders' which Mendeley will monitor. Any PDFs added to a watched folder will be automatically imported.

2.3 **Manual entry**

If it is not possible to acquire a reference through the above means, you can add the information manually.

1. From the **Add** button dropdown, select **Add Entry Manually** (Desktop) or **New manual entry** (Web).
2. Use the **Type** dropdown to select the type of material you are adding. This will ensure that the appropriate fields for that type are shown.
3. Complete the fields that are needed for your referencing style. Add any other information that you will find useful.
4. **Save** your entry. It will be added to your library.

2.4 **Related Documents**

Mendeley Desktop also has a Related Documents feature which suggests other articles Mendeley is aware of that may be of relevance. Select an article in your library and then choose the **Related** icon in the top menu. Results can be added to your library.

Likewise, Mendeley Web has a **Suggest** feature (top menu) which suggests other papers based on the contents of your library.
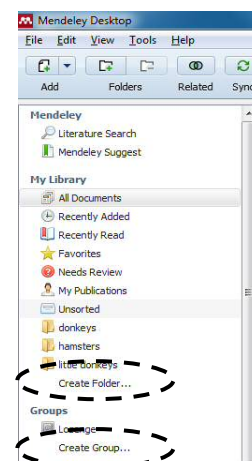
3 Managing references

3.1 Folders

The principal feature for managing references is **Folders**. Each reference may be assigned to one or more folders. Select **Create Folder…** in the left-hand menu to create a new folder. You can drag and drop references into folders.

3.2 Groups

You can also add references to **Groups**. Groups allow you to share items with other users. In Mendeley Desktop, groups can be created using the **Create Group…** option in the left-hand menu. In Mendeley Web, select **Groups** from the top menu:

3.3 Attaching PDFs

You can attach PDFs to existing references.

In Mendeley Desktop, select the reference you need and use the **Add File…** option in the **Details** pane (right-hand panel). You may have to scroll down the Details pane to find the **Files** section.

In Mendeley Web, select the reference and then use the **Click or drag file here** box in the **Details** pane (right-hand panel).
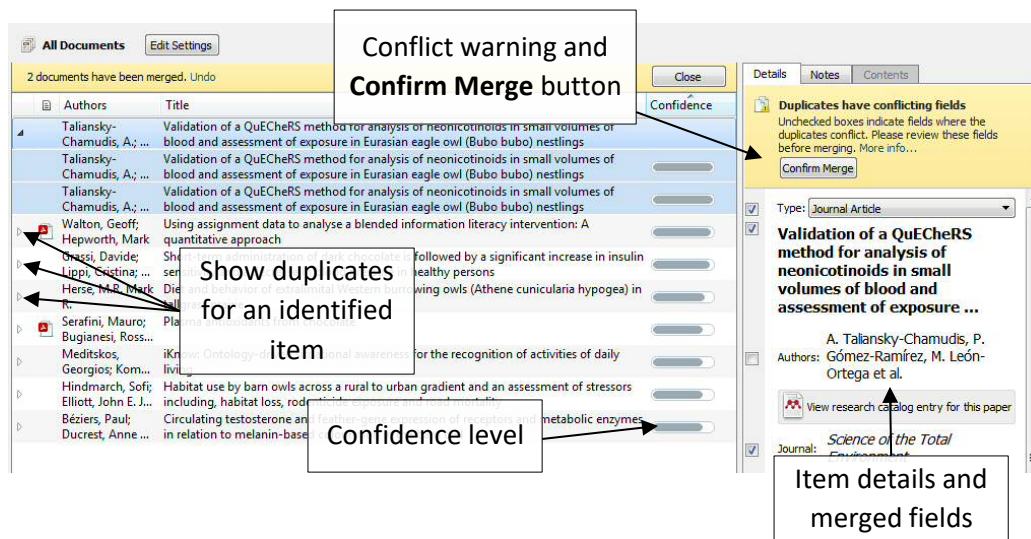
3.4 Duplicates

Searching several bibliographic databases may result in acquiring the same reference more than once. Mendeley Desktop has a tool for finding duplicates in your library:

1. From the **Tools** menu, select **Check for Duplicates**.
2. Any duplicate items will be displayed in a concertina list, with the duplicate items grouped beneath a header item. If the duplicates contain any conflicting information, you will be alerted in the **Details** pane on the right-hand side of the screen.

3. Correct any conflicts by expanding the item list and choosing the information you want to retain.

4. Select **Confirm Merge** to merge the duplicates into a single reference.


In the example above, the Taliansky-Chamudis article has been expanded to show the two duplicates being merged. The lack of a check-mark in the **Author** field on the **Details** panel, indicates conflicting data in the two copies of the paper. In order to resolve the conflict, you would need to select the paper with the correct details and check the **Author** box for that paper.

3.5 **Adding notes**

Both versions of Mendeley allow you to make notes about an item. The Notes tab can be found on the right-hand panel.

In addition to simple notes, Mendeley also has a built in PDF annotator. This is available in both versions, though Desktop has added functionality. The editor is accessed by double-clicking on a reference with an attached PDF.
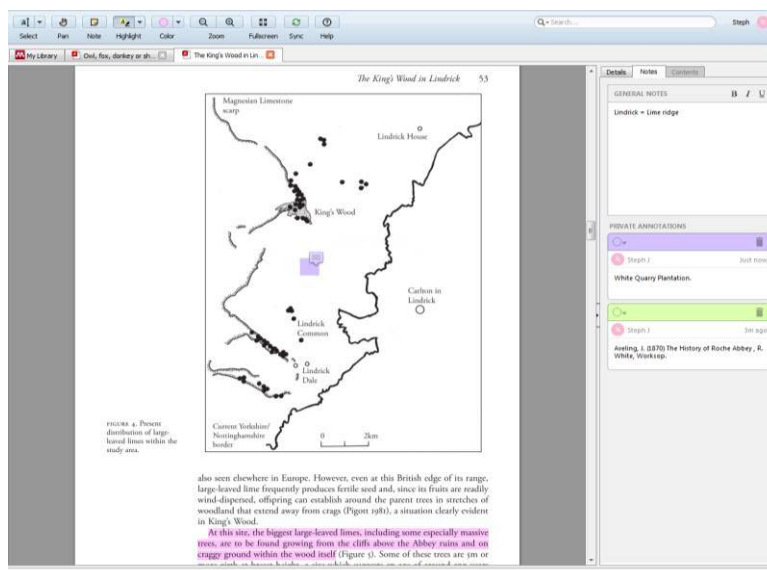
4   Referencing

Citing and referencing is managed by Mendeley Desktop. If you have been collecting your references in Mendeley Web, be sure to sync your libraries using the **Sync** button in Mendeley Desktop.

4.1   University of York citation styles

Mendeley includes style definitions for generic referencing styles, such as APA, MLA, Harvard etc. However, the University of York uses versions of these styles which may vary from the generic version. You should install the University of York styles you need from within Mendeley Desktop:

1. From the **View** menu, select **Citation Style > More Styles…**
2. Switch to the **Get More Styles** tab and search for **University of York**
3. Choose the style you require and select **Install**.
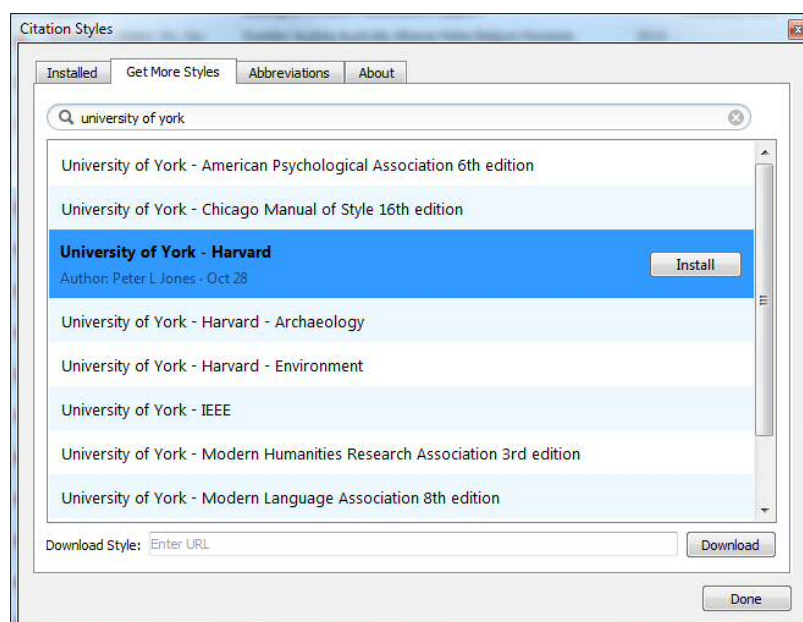
4. Return to the **Installed** tab and find the style you just added.
5. Select the style, select **Use this Style**, and click **Done**.
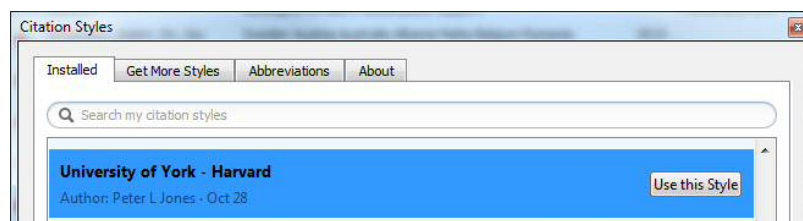
4.2 Citations in MS Word

Ensure that the Citation Plugin is installed (see section 1.4 above). You will need to do this on University computers as well as on your own.
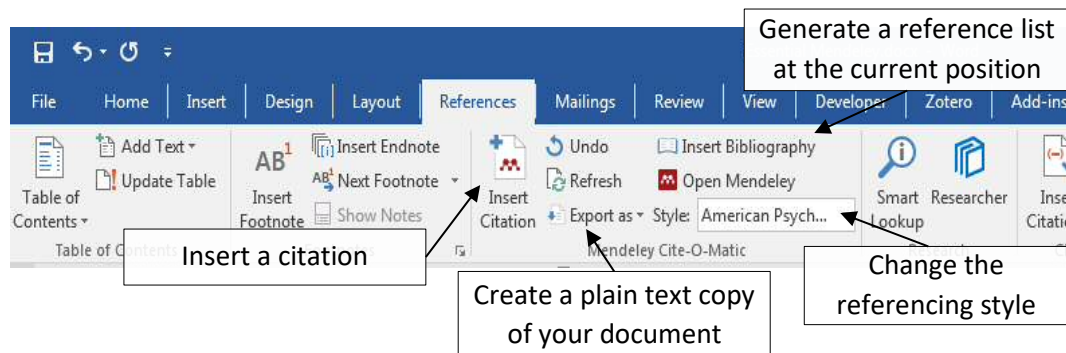
If you see the following security warning in Word…

⚠ SECURITY WARNING Some active content has been disabled. Click for more details.	Enable Content
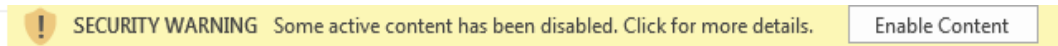
…you will need to **Enable Content** for the plugin to work.

4.2.1 Inserting citations

The plugin provides the tools you need to insert, format, and manage citations, and to create a reference list.

1. Position the cursor where you want to insert your first citation

2. From the **References** tab, select the **Insert Citation** icon

3. The Mendeley Citation Editor popup will appear, allowing you to search your Mendeley library for the appropriate reference

4. Enter a search term and choose the desired reference from the list of results:
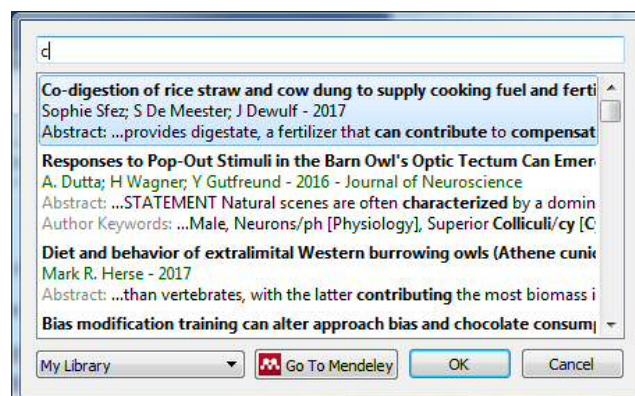
5. If you need to add another citation in the same location, start typing again (over-typing **Search for additional reference**):
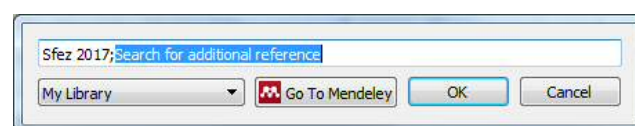
6. Select the citation in the search box if you need to add further details or suppress the author's name from the citation:
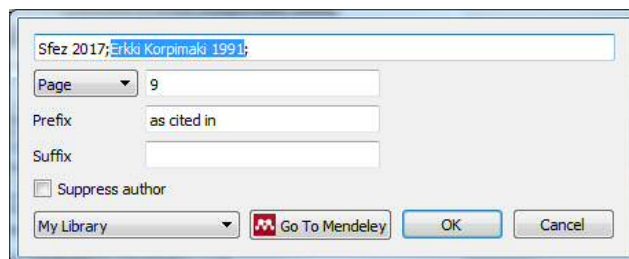
7. Choose **OK** to insert the citation(s).

Inserting citations as footnotes

Some bibliographic styles require citations to be entered as footnotes. Mendeley should do this automatically as long as you've chosen a suitable style – put your cursor where the footnote number needs to go, then insert the citation as above. The reference should then be added not after the text, but as a new footnote.

4.2.2 Reformatting citations

You can change the referencing style at any point by selecting a new style from the **Style** dropdown on the Mendeley ribbon. This will reformat all citations in your document to match the new style.

Note   You can switch between inline and footnote styles as long as the footnote styles are done automatically by Mendeley (see 'Inserting citations as footnotes' above). If the footnotes are inserted manually, this will not work.

4.2.3 Creating a reference list

To generate a list of the references you've cited, place your cursor where you want the bibliography to appear and select **Insert Bibliography**. This will automatically generate a reference list using the data from Mendeley. You can insert a bibliography at any time, and the contents will update as you add more citations to your document. You may need to use the **Refresh** button on the Mendeley ribbon to update the bibliography.

4.2.4 Editing

Editing citations

The citations are populated using Word fields. This has implications on how you edit the contents.

You *can* edit a citation directly by just typing into it, but this will break the link between that citation and Mendeley, and any changes you make will not be reflected in the automatically generated bibliography. Should you choose to break the link to Mendeley, you can restore it by selecting the modified citation and choosing the **Undo** option from the Mendeley ribbon.

A better approach to editing a citation is to select the citation you wish to modify, and choose **Edit citation**. This will reopen the citation popup.

- To add a new citation, just type a search and make your selection
- To modify the existing citation, select that citation in the search field to bring up the advanced fields (as per step 6 in section 4.2.1, above)

Note Any changes made to a citation will only apply to the specific citation you edited.

If you need to make bigger changes to a citation (e.g. to the author name or the date) you will need to make these in Mendeley and then reinsert your citation, as these are essential elements for generating the citation.

To remove a citation completely, simply delete it.

Editing the reference list

Since the reference list is generated automatically, it cannot be edited. Any changes you make to it will be over-written. If you need to make changes to the content of the reference list, you can modify the information in Mendeley itself, or make the changes later, when you create a plain text version of your document (see 4.3, below).

If you need to remove a reference from your list, you will need to remove its citation from your document.

4.2.5 Merging Citations

If two separate citations appear together you may want to combine these into a single reference for style purposes:

- Highlight the two references to be merged

- Select **Merge Citations** from the Mendeley ribbon

- The two citations will be merged into a single, properly styled reference.

## 4.3 Exporting a plain text document

Word fields are used to generate the content of citations and reference lists; fields generally display content acquired from another source and so do not contain directly editable text. Fields are essential for many features in Word, including page numbers, captions, cross-references, tables of contents, and, not least, the functionality of the Mendeley plugin.

After inserting your citations and bibliography, you may want a fully editable document. This could be for several reasons:

- Some citations or references do not display correctly and require minor edits
- You may want to share the document and wish to avoid any risk of a reviewer's reference management application changing your citations / references
- You want to submit the document via *Turnitin*

To create a 'fixed' version of the document, converting your citations and references to normal, editable text, choose the **Export as** option on the Mendeley ribbon, and select **Without Mendeley Fields**. This will create a copy of your document in the location you specify.

The created document uses an earlier version of the Word file-format, which may change how your document displays. To overcome this, open your new document, go to **File > Save As** and save a version of the document in the latest .docx format:
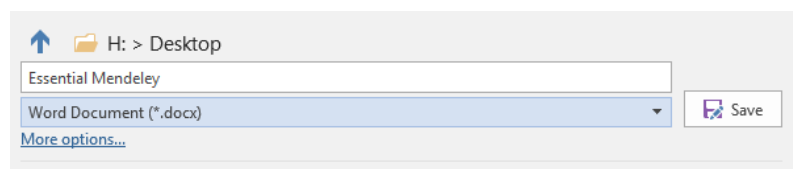
If this new .docx version of the document is still not displaying properly, there are workaround methods:

- Having first saved a backup copy of your document, select text containing Mendeley citations/references and press **Ctrl-Shift-F9** simultaneously to convert any fields in your selection to plain text (be sure to start with the bibliography, since this is generated from the citations). **Note**: this method will convert *any* Word fields in your selection to plain text, so ensure there are no captions, cross-references, tables of contents/figures etc., in the selection.
- If converting for submission, and your guidance permits you to submit your work as a PDF, you may find it more straightforward to export your original document in that format (**File > Export**), especially if you do not need to make any other modifications to the text.

4.4   Thesis Assembly with Mendeley citations

If you use separate documents for chapters for a thesis or other complex document and you insert citations using Mendeley, when you come to assemble your final document you will need to create a final bibliography. For combining your chapters, it is best if they do not have bibliographies in the original document for each chapter. If you have generated a bibliography for your chapter using **Insert Bibliography**, it can be removed by selecting the whole bibliography and using the Delete key. Once all your chapters are in one document, you can place your cursor at the end of the document and choose **Insert Bibliography**.

For in-depth guidance on how to do this with different methods of assembling a final thesis document, visit https://subjectguides.york.ac.uk/skills/reference-management and then under the 'Mendeley and assembling your thesis' heading you'll find details and a guidance document.

5   It's also useful to know…

1. If/when you cease to be a member of the University of York, and you log into Mendeley with your University email address, you'll need to change to an alternative email address. In Mendeley Web, use the user dropdown (   ) in the top-right, and select **Settings & privacy**.

2. Mendeley Web incorporates a social platform where researchers can share research interests.

3. Mendeley has a maximum capacity of 2GB free storage, allowing you to access uploaded PDFs from anywhere with an internet connection.

4. You can export your Mendeley library for use in another reference management application. In Mendeley Desktop, go to **File > Export**.

5. Likewise, reference libraries generated in other applications can generally be imported into Mendeley.

~Notes~

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