

# Intro to Mendeley

Reigning in all your cites: Citation management and collaboration



Presented by the FACT Lab, [www.factuic.org](http://www.factuic.org)  
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## 1. Installation

Install Mendeley by visiting their website [www.mendeley.com](http://www.mendeley.com) and setting up a new free account. You can also select *Download* from the home page by selecting your operating system (e.g., Mac, PC).

## 2. What can be cited?

You can cite anything that is normally cited in the education field, including:

- Journal articles
- Conference proceedings
- Books
- Book sections (chapters)
- Websites
- Newspaper and magazine articles
- Unpublished reports and white papers
- Software
- Laws and statutes
- Court cases

You select what type each citation is when entering it into Mendeley.

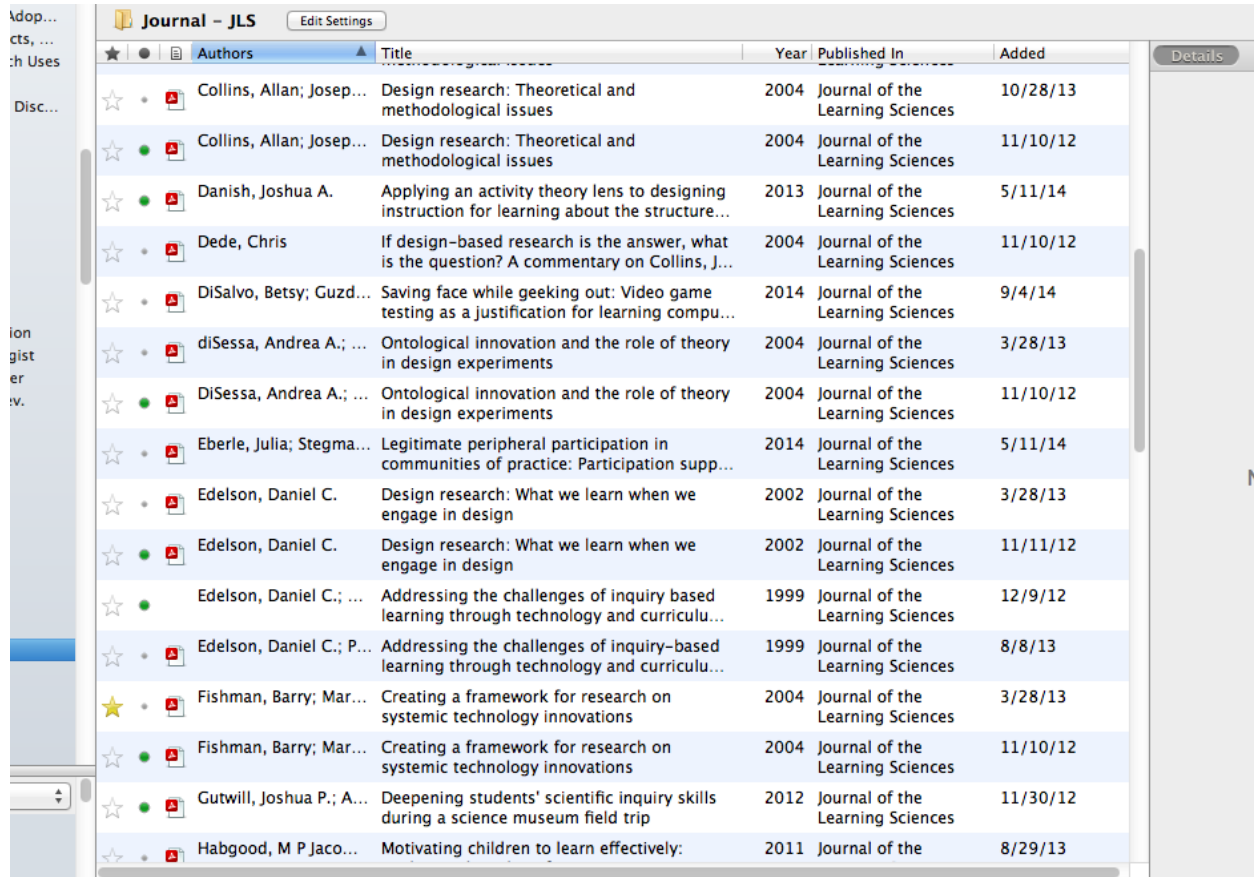
## 3. The interface

There are many ways you can access Mendeley. The easiest way is via the *desktop app*, the one you install on your PC or Mac. This app will give you full control of your citations. There is a *web app* that you can access all of your citations at [www.mendeley.com](http://www.mendeley.com) by logging in. You can also download Mendeley *mobile apps* for your iPhone, iPad, or Android device from the app stores of those devices. However, these mobile apps are not yet the best (but check back soon - the Mendeley team says many good developments will happen in 2015!).

The Mac and PC versions are almost identical, so no worries there!

### Main Interface (Desktop)

From here you will make most of your edits to your articles and work with your citations. On the main screen, you will see a list of all citations within a particular folder. Mendeley defaults to “**All Documents**” so you can see everything at once. Clicking on the top of any field (e.g., Authors, Title, Year, Added) will sort by that field. This is good for seeing your most recent entries (by sorting by *Added*) or by author (by sorting by *Author*).



**Figure 1. Main interface (desktop version)**

These fields represent what are called **metadata** (e.g., Author(s), Title, Date of Publication, Publication name). Metadata are useful when looking for citations later on. The search bar at the top right of the screen will use any of this data when searching for an article.

Some important icons in this screen to consider are 1) the **star**, which means only that an article is important to you. It helps you see articles you want to prioritize quickly; 2) the **green dot**, which tells you that an article PDF has not been opened yet (unread); and 3) the **PDF icon**, which lets you know if you have a PDF attached to a citation or not.

Clicking on any citation will bring up its details in the right side of the screen. You can change any of these details at any time. Your changes will automatically be synced to the Mendeley server and will show up in all of your Mendeley apps.

## 4. Importing citations

There are many ways to import new items into Mendeley.

A) **Import PDF.** The primary way of doing this is if you have a PDF of a document that you want to import. Select **file** → **add files (or “add folder”, if you want to add an entire folder of PDFs)** → **select your file(s) for import.** Mendeley will bring in these PDFs and have you verify their citations. Some citation metadata may have already been input for you. After selecting a citation, the “document details” screen on the right will show you the metadata for that citation.

Some tips:

- a. ***Make sure you select the correct “citation type” (journal article, book, conference paper).***
- b. ***Make sure you enter the title as you would with APA if you are using APA format (i.e., Caps on only the first words of a sentence section).*** Mendeley will not correct this for you.

B) **Add entry manually.** This is the option you choose if you do not have a PDF (like a book or other document). Select this option and fill out all the metadata. Remember to use APA title structure if you are using APA.

C) **Watched folders.** You can have a folder on your computer serve as a “watch folder.” This is a wonderful option for saving you time. Every time a PDF is put in the watch folder, Mendeley will automatically import it if Mendeley is running. You will still have to verify the metadata like in option 1 of a regular PDF import, but this option allows you to quickly put PDFs you are downloading into a folder and never worry about them again!

Set up a watched folder by going to **preferences** → **watched folders tab** → **“enable” watched folders** → **select a folder for watching.**

A watched folder can also be on an online or “cloud” drive (e.g., Google Drive, Dropbox, Box), so you can access your watched folder from anywhere and from any device. This **only** works, however, if you have a desktop version of that drive installed that gives you the ability to make folders on your desktop (such as Google Drive Desktop, Box Sync, and Dropbox for PC or Mac). Point your watched folder in Mendeley to a folder of your choice on your cloud service to enable this.

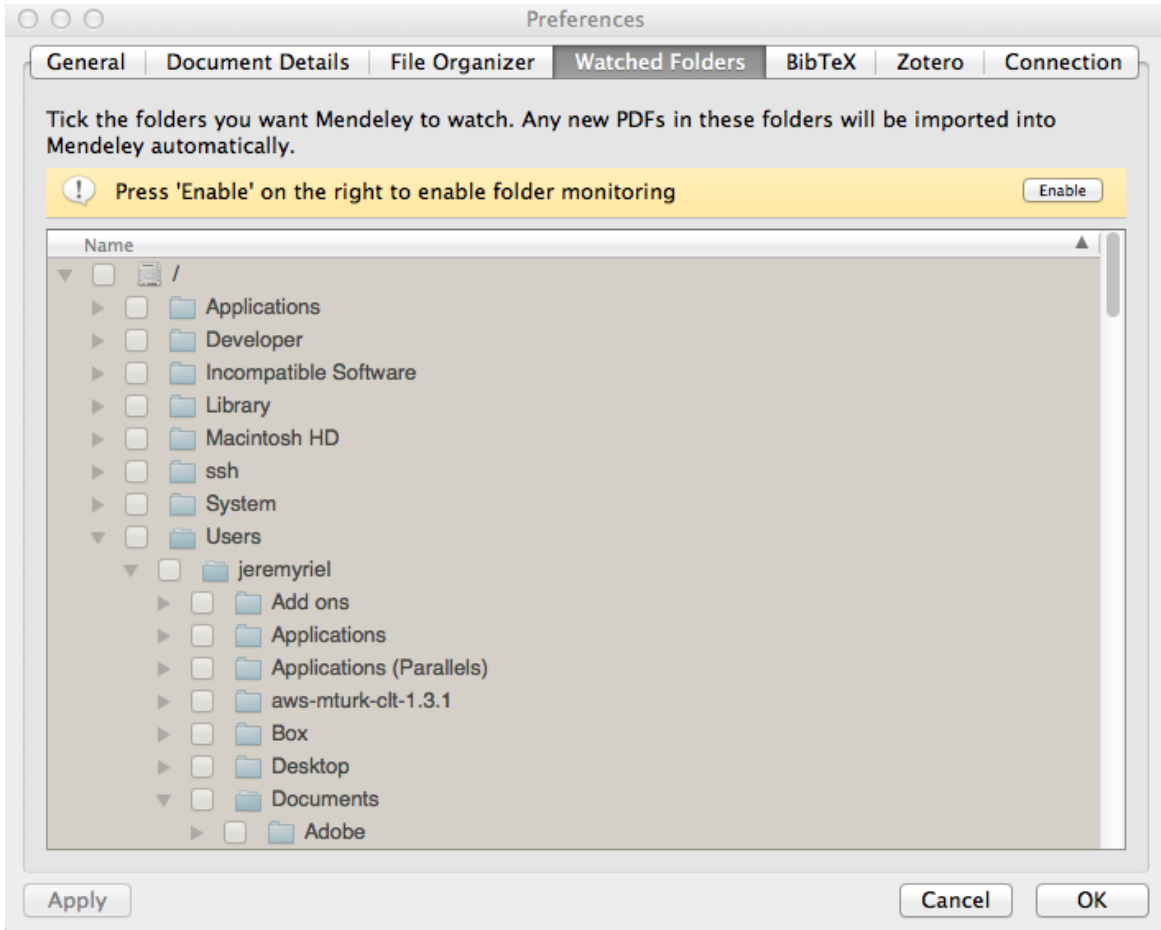


Figure 2. Watched folder setup screen (in preferences)

## 5. Syncing across the cloud

There are a few things to consider when syncing apps on your computer or over a cloud drive. The first is that you may want Mendeley to **copy** your PDFs and give them new titles using a consistent titling scheme across all your articles (*highly recommended! This saves so much time!*). The second is that you need to have a set of folders setup for retrieving a from a cloud watched folder and sending copied articles with new titles to the cloud.

A) **Setting up your “copied articles” folder to have pretty PDF titles.** This is very useful as Mendeley will automatically rename your PDFs with the author(s) name and year, giving you a consistent naming of all articles in your collection. It does this by *copying* your articles to another location, as not to disturb the original that was imported (either manually or via the watched folder)

Set this up by going to **preferences** → **file organizer tab**. You should check “Organize my files” and select a path for your files to be copied to. If you are not using a cloud drive, this

should be somewhere on your computer. If you use a cloud drive, this should be on your drive.

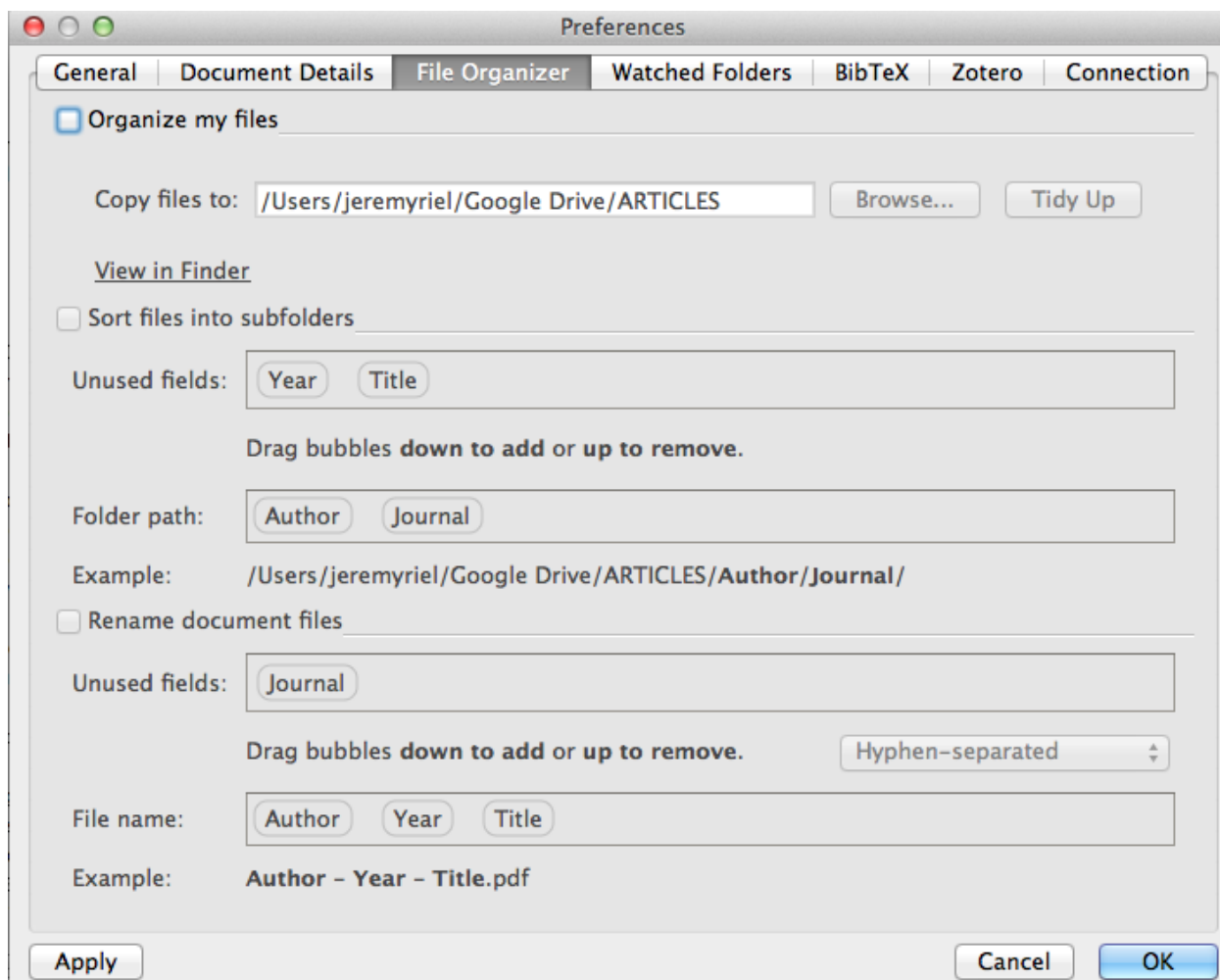


Figure 3. File organizer for setting up copied files.

**Steps:**

- A. Check the box “organize my files”
- B. Select a location to copy files to. If not using a cloud drive, save to your computer somewhere, like “My Documents → Mendeley Articles”. If you are using a cloud drive, create a folder on your cloud drive and point to the *local* version of that folder on your own computer...reminder that you must have the desktop app for that service installed!
- C. *Sort files into subfolders* is a great tool for keeping track of articles. Check this. It will put your articles into subfolders based on journal and author
- D. *Rename document files* is the real timesaver - check this to have Mendeley automatically change the titles of your PDFs to whatever *consistent* method you choose. The system defaults to having PDFs named Author-Year-Title.pdf. Drag the bubbles to change this.

## 6. Sorting citations

There are many ways to sort your citations. Mendeley provides a robust filing system, as well as the ability to tag each entry with a system of tags and keywords. The system remembers and suggests previous tags/keywords so that you can use consistent tags throughout your articles.

A) **Folders.** One main way that you can sort your articles are into themed folders. These folders can be of anything you want. All you have to do is *create folder* and drag an article into the folder. You can select more than one cite at a time - use CTRL/CMD+click or SHIFT+click to select more than one.

Folders appear on the left sidebar. As you start to get many folders, it will become scrollable. If you have no folders yet, the *create folder* command will appear below “All Documents.” The *create folder* command is always at the bottom of the folder list. You can rename a folder by right clicking on it and selecting *rename*. This will happen frequently as you begin to curate your collection and find more appropriate titles for folders!

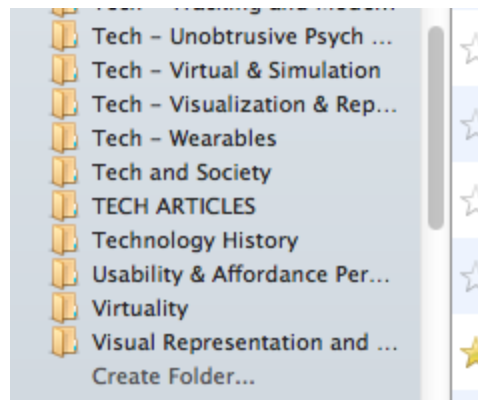


Figure 4. “Create Folder” selection on the left sidebar

FYI: you can enter a single article in more than one folder, and it becomes really useful to do so! A single article may be a part of many different folder categories that you make. As such, there are some good tricks for organizing your folders. You could sort in a variety of ways to make your searching easier:

- **Create folders of specific journals.** If you have some journals you frequently read and pull from, create folders for those journals. This will allow you to browse articles from the journal and you may find something you weren't expecting
- **Create folders of topics.** If you study certain phenomena, or have an interest in certain topics, you can create folders for each of those topics. Put a cite in these folders if they are even somewhat related to the topic, as you may not know when you'll need it. You can then browse by topic area. I am interested in different kinds of technologies, so the example in Figure 4 shows many different technology topic area

folders that I put studies into. If I am looking for something on “visualization,” I can quickly browse my visualization folder and see if anything is of interest.

- **Create folders by study.** If you are working on a paper or study, put all of the citations you use (or may use) into a folder for each study. This will let you go to the folder quickly for cites as you are working on the study, or go back after the study to see cites that may be useful in the future.

## B) Tagging, author keywords, and abstracts

Make heavy use of tags and keywords, as they can be your friends later on. Enter tags and author keywords on the citation details screen for each cite.

Tags and author keywords are separated by a semicolon (;). They operate generally the same, and you may end up using only one of the two, or both (I tend to use only tags). When you enter a tag, it becomes eligible for search, so you can create your own tags to help you find something later on.

You can also enter the abstracts of papers into the metadata screen, which become also eligible for search.

Most of the time, an author provides keywords for their study. You can insert these keywords into Mendeley from the paper.

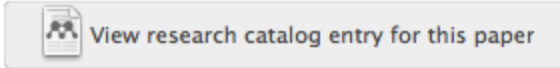
Some tagging tips:

- It is sometimes useful to use a hashtag in front of each tag (#). This is not just to keep up with instagram and twitter trends, but instead to show you **only** those results that you have listed as a tag (instead of all text that might match in all documents and metadata).
  - Example: I want to tag an article with the word *visualization*, that tells me that this article describes digital visualizations in some way. If I just use the word *visualization* in the tag, it will come up with every other use of the word *visualization* in search, which includes the content of PDFs and other metadata in articles. If I **only** want to see my tags in a search, I can use a hashtag (*#visualization*) to show me anything that is tagged as such.
- Be creative in your tags! Tagging by its nature is not defined by anyone but you - find words, acronyms, or other combinations of letters and numbers that you will remember so that you can find your articles faster!
- Tags are remembered by the Mendeley system, so it will recommend you tags as you start to type them to help you remember tags you've used!
- Hashtags are not required, but are only a useful trick to help you find stuff faster that you have specifically used as tags

Type:

**Patterns, Probabilities, and People: Making Sense of Quantitative Change in Comple...**

Authors: M. Wilkerson-Jerde, U. Wilen...

 View research catalog entry for this paper

Journal: *Journal of the Learning Scien...*

Year: 2014

Volume:

Issue:

Pages: Advance online publication

**Abstract:**

**Tags:**  
#change; #complex-systems; #measurement;  
#patterns; #probabilities

**Author Keywords:**

**Date Accessed:**  
2014-12-23

**Day:**  
21

**Figure 5. Metadata screen where you can enter tags and author keywords**

## 7. Finding articles

Use the search bar at the top right corner to conduct searches on your library. Use a hashtag in the search bar if you want to search any tags that you have used with hashtags. You can enter anything: keywords, terms, authors, years, etc. The search will bring up anything that has that term in it.

If your search stalls out, close the program and re-open it. Mendeley may need to reset its search system and restarting helps do this (especially when your library becomes large).

You can also browse articles based on any folders you create. Being creative in your folder system can help you find articles later on based on topic, journal, or other parameter!



## 8. Reading and annotating articles

You can read your PDFs in many ways. You can also annotate and add notes to your Mendeley articles from within the desktop app. If you add some third-party PDF annotator apps, you can really have a great workflow set up!

A) **Reading from within Mendeley.** Click on the pdf icon on the main screen for a cite to bring up a PDF reader from within Mendeley. It will create a new tab for you at the top of the screen. You can annotate your PDFs from within Mendeley here, but it will not save your annotations on the actual PDF (it can only be viewed from within Mendeley). That is fine for many cases, so if you are looking for a strong PDF annotator, then this one is for you!

You can also leave notes about articles in Mendeley. Click the **notes** tab on the metadata screen for each article. This is really useful for keeping your notes, ideas, and summaries attached to the article in your database.

B) **Reading on the web (great for teams).** If you keep your PDFs in a cloud storage drive (e.g., Google Drive, Dropbox, Box) you can access your PDFs that were renamed by Mendeley. Using a browser-based PDF reader will allow you to view and read these articles. Some PDF readers also allow you to annotate **and** save to the original file. This is where Mendeley gets really powerful - you can have Mendeley keep track of everything and use a browser-based PDF annotator to make notes on your articles - all organized in your cloud drive.

At this time, **NotablePDF** (<https://www.notablepdf.com/>) is a great chrome web browser extension that allows you to read and annotate PDFs from Google Drive and automatically saves any annotations back to the article in Google Drive. There is a free version of the app but for some of the advanced features, you may need to pay for the full version of the app (they usually run deals for \$20/lifetime). The other bonus is that anyone with access to the PDF can also annotate using NotablePDF *and* it will record who made each annotation (remember, you can give permissions to people to see folders in cloud drives).

This makes it a valuable tool for sharing articles among teams and commenting on articles. It might be wise to have one person designated as the “article curator,” and thus that is the only person with the job of putting new articles in and curating the collection to keep things organized.

## 9. Pulling/using citations

You can pull and use your citations in many ways. If you use Microsoft Word, you can also directly link Mendeley to Word to auto-generate bibliographies and in-line citations for you (sorry Google Docs users - maybe in future updates they'll have this function!).

## **MAKE SURE YOU HAVE SET UP APA FORMAT!**

- Select this at **View** → **Citation Style** → **APA 6th ed.**

A) **Direct copy of citation.** You can get the APA citation for an entry by just clicking on the citation in the main screen and pressing CTRL+C (CMD+C if Mac) and just pasting it wherever you want. It will be copied to the clipboard. You can also right-click the citation and select **copy as** → **formatted citation**.

Direct copy of citation is how it is currently done best in Google Docs when writing papers.

B) **Link to Microsoft Word.** You will need to install the Word extension from Mendeley. In the Mendeley desktop app, select **Tools** → **Install MS Office Plugin**. This should walk you through the process.

You can now perform searches of your Mendeley database from within Word to find authors. You will insert a cite by selecting **Insert citation** from the Mendeley toolbar from within Word. You will also need to create a bibliography. Do this at the end of your document by selecting **insert bibliography** from the Mendeley toolbar menu. The bibliography will be automatically updated every time you insert a new in-line citation.

For your in-line cites, you can choose to withhold author name if you already mentioned the author. Simply check “hold author” when inserting the cite.