Tips and Tricks: Introductory Mendeley training

WARNING

If you are using Mendeley on an OU PC and a message pops up saying there's an update, click **Not Now**. IT centrally manage Mendeley updates on OU PCs and they say that when people try and update it themselves it causes problems.

Importing references via PDF

This is the simplest route to getting references into Mendeley.

- Go to a database of your choice (e.g. ORO - http://oro.open.ac.uk/).
- Find an article that interests you.
- Save the PDF of the article to a folder on your PC/account.
- In Mendeley, go to **Add Files** and click the add file icon.
- In the dialogue box that appears, navigate to where your PDF(s) are located, select one or more files, and click **Open.**

  Note – you can also drag and drop PDFs from their folder into Mendeley.

- A yellow message might pop in Mendeley, saying that the details of the item you have added need reviewing.
  - Check the details that Mendeley has imported for the item against the details within the PDF itself or on the website/resource you found it.
  - If the details are accurate click **Details are Correct**.
  - Alternatively, click **Search** to search the Mendeley catalogue for the right details.
  - If a green tick appears nest to Search, it means that details have been found in the Mendeley catalogue.
  - However, we would still recommend checking the details manually.
- Even if no yellow message pops up, it is always worth double checking what Mendeley imports with the information on the text itself and/or with the record on the database/website you got the PDF from.

Reading a PDF

- Double click any record that has a PDF icon to start reading the PDF within Mendeley.

Highlighting text in a PDF

- Click the **Highlight** icon and then select any text to highlight it.

Adding a note to a PDF

- Click the **Note** icon and then click any point of the PDF to add a note to it.

Copying text from a PDF

- Click the **Select** icon and then select any text, click **Copy** from the menu that appears to copy it.

Tagging records

Tagging lets you add custom text labels, tags, to Mendeley records. This can make them easy to find and re-use.

- Click on a record in the central pane of Mendeley.
- The record will appear in the right-hand pane and you can simply click in the Tags field of the record to add your own tags.
- Remember to separate tags using a semicolon.
- You can then use the **Search** box in Mendeley to locate your records by tags.
- You can also use the filter pane in the bottom left of the screen to select **Filter by My Tags.**

Adding references from databases

Scopus

- Navigate to Scopus via the database A-Z list http://www.open.ac.uk/library/library-resources/databases
- Do a search and select the references you want to export and click on **Export** and then select the **Mendeley** option.
- Select **Export.**

If this does not work:

- One you have searched and selected you references click on **Export** (if you have already tried the above you need to click on the arrow next **Save to Mendeley**).
- Select **RIS format (EndNote, Reference Manager).**
- Select the fields that you wish to include and then click on **Export.**
- Save the file.
- In your Mendeley desktop, go to **File** and then **Import** and **RIS (Research Information System).**
- Navigate to where you saved the file and click open.

Web of Science

- Navigate to Web of Science via the database A-Z list
  http://www.open.ac.uk/library/library-resources/databases
- Do a search and select the references you want to export.
- From the drop-down list at the top of your search results, change the default option from Save to EndNote online to **Save to Other File Formats.**
- Select the fields you wish to include, change the file format to **BibTeX** and click **Send.**
- Save the file.
- In your Mendeley desktop, go to **File** and then **Import** and **BibTex.**
- Navigate to where you saved the file and click open.

Adding references manually

- In Mendeley, go to **File** > **'Add Entry Manually…'**
- In the **Type** drop down, select the type of item (e.g. journal, book chapter etc.) you're creating a record for.

  Note – it is important to select the right reference type as different types have different fields.

- Enter the information (e.g. author, title etc.) in the fields supplied.

  Note – it is particularly important to work accurately if you're entering data manually, please refer to the item itself for guidance and check your work closely.

Adding references using Web Importer

- Go to **Tools** and then **Install the Web Importer.**
- To use the Web Importer, click on it when looking at papers, webpages, and documents online. The Web Importer will scan your current browser window for references, and present you with its findings, which you then can choose to save as reference in your Mendeley library.

Sync

Here is clarification regarding how sync works in Mendeley:

- In order for Mendeley to save records, PDFs, notes, highlighting etc. it needs to sync.

- Syncing saves your information to the Mendeley servers, meaning you can then access your information at a later point (and on any other devices you have set up with Mendeley).

- However, the desktop version of Mendeley only syncs automatically when it is opened, further syncs have to be done manually.

- You can manually sync the desktop version of Mendeley at any time by clicking the Sync button.

- o **Sync Mendeley before you delete any PDFs from your computer and whenever you want to ensure it has saved your information.**

- o If you have synced Mendeley but do not have the PDFs of certain articles saved on your computer any longer then you may be prompted to download the PDFs back from the Mendeley servers via a download icon (highlighted red):

  - See the Synchronize across devices help guide for more information.

  - Additionally, it is recommended that you backup your Mendeley library click **Help** and then **Create backup.**

Folder and groups

Creating a new folder

- Click the **Create a new folder** icon on the main toolbar.
- Enter the name for the folder.

Adding references to an existing folder

- Drag and drop references into the folder(s) you want them to appear in.

Accessing a folder

- Under My Groups on the left-hand side, you can click any group name to see what's in that group.

Mendeley and Microsoft Word

Setup

- In Mendeley go to **Tools** then click **Install MS Word Plugin.**
- Read the instructions in the pop-up box that appears and click **OK.**

Adding a citation

- Go to the **REFERENCES** tab in Word.
- In the **Mendeley Cite-O-Matic** section, click **Insert Citation.**
- Search for the item you want to cite by entering keywords in the search box (words from the item title, the author name, the year of publication etc.) and select the item you want to cite from the list of results and click **OK.**

Choosing an output style

- Go to the **REFERENCES** tab in Word.
- In the **Mendeley Cite-O-Matic** section, use the **Style** drop-down to select the style you want to use (e.g. Harvard, Chicago Manual of Style or the name of a specific journal or publisher).
  - Note - if the style you want isn't listed in the drop-down, then click **More Styles**, click the style you want in the pop-up box that appears in Mendeley, click **Use this Style** and then **Done.**

Editing a citation

- In Word, click the citation you want to edit. The citation will become highlighted grey.

- Go to the **REFERENCES** tab.

- In the **Mendeley Cite-O-Matic** section, Select **Edit Citation.**

- You can now:

  - Click on the information relating to the reference you want to edit and

    - Add page numbers to the citation in the **Page** field.

      - *Note - This field can be changed via the drop-down to specify chapter, issue, volume etc. instead.*

    - Tick the **Suppress author** box if you do not want the author name to appear in your citation.

  - Add an additional citation in the same place, as descibed in Adding a citation, above.

Adding a bibliography

- Place the insertion point (flashing line) in Word where you want your bibliography to appear.

- Go to the **REFERENCES** tab.

- In the **Mendeley Cite-O-Matic** section, select **Insert Bibliography**.

Getting help

- Go to **Help** > **Help Guides** to learn more about Mendeley.
- See the Mendeley YouTube channel, where the Mendeley QuickTips and

  Mendeley Minutes playlists are particularly useful.

- Email library-research-support@open.ac.uk