

INSTALLING & SETTING UP MENDELEY

Step 1: Sign up for Mendeley

Sign up for Mendeley by visiting: <https://www.mendeley.com/join>

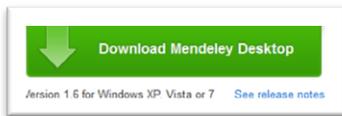
You can create a new account or use your Facebook credentials to log in.



A screenshot of the Mendeley sign-up form. It contains three input fields: 'First name', 'Last name', and 'E-mail address'. Below these fields is a green button labeled 'Sign up & Download'. At the bottom, there is a link that says '...or sign in with' followed by a Facebook logo and the text 'Facebook'.

Step 2: Install Mendeley Desktop

Download Mendeley Desktop by visiting <http://www.mendeley.com/download-mendeley-desktop/> and clicking on the icon below



Step 3: Install the web importer

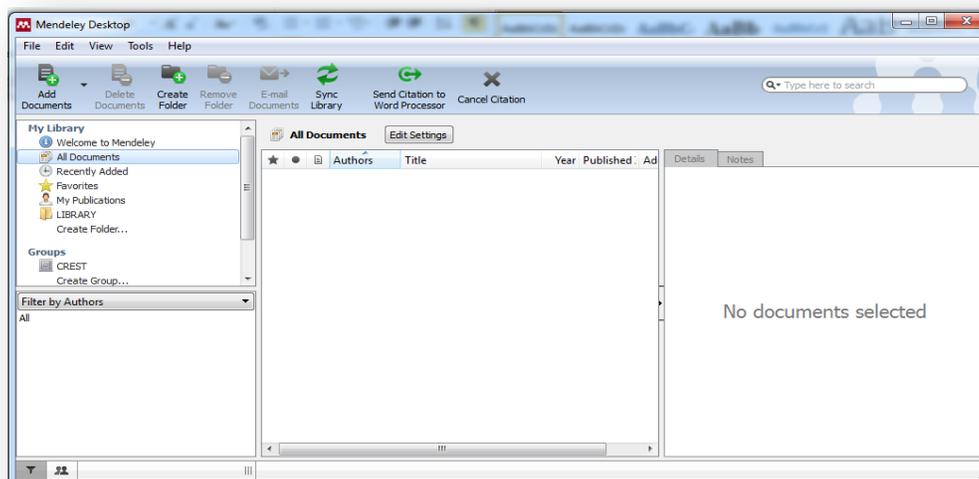
You can download the web importer in two ways: Go to <http://www.mendeley.com/import>



1. Drag the 'Import to Mendeley' button to your bookmarks toolbar
2. Right-click on the button and choose to add this link to your bookmarks

The Mendeley Interface: *My Library*

1. The **left column** is the overview of your sources. You see *My Library* divided into folders and groups. Some folders are automatically created for you, such as *Recently Added*, *Favorites*, and *Unsorted*. The bottom section of the **left column** allows you to quickly filter by tags, author, publication, and author keywords.
2. The **middle column** is a sortable list of sources. What appears in this column is dependent on your selection in the left column.
3. The **right column** displays the details and notes of a selected source. What appears in this column is dependent on your selection in the **middle column**.
4. The toolbar contains common tasks, such as searching *My Library*; adding and deleting items and folders; and syncing. You can also perform many tasks with dragging and dropping or right-clicks.



GETTING CITATIONS INTO MENDELEY

Adding PDFs

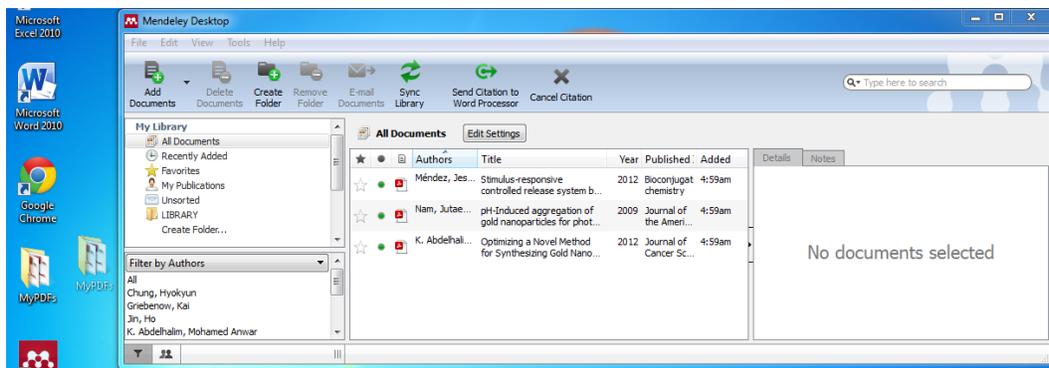
You can add PDFs to Mendeley Desktop in **two** ways:

1. Use the 'Add Document' button located in the Mendeley Desktop toolbar

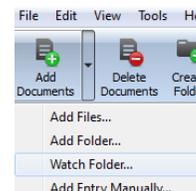


or

2. Drag and drop PDFs into the middle column of Mendeley Desktop



Quick Tip: If you select the arrow next to the "Add Documents" button and select Watch Folder you can designate a folder in which current PDFs and future documents added to the folder will be automatically imported into Mendeley.

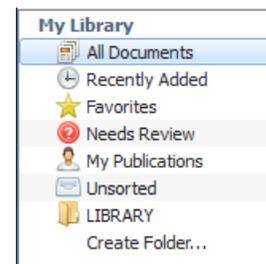


Needs Review section

In either case, Mendeley detects document details (authors, abstracts, keyword, etc.) for all documents added to your library. If Mendeley is unclear about document data for a newly imported document, it will add that document to the 'Needs Review' section of your library for manual verification.

If you prefer not to enter this information manually, Mendeley give you two options for searching for this data:

1. Use Mendeley's 'document details' lookup feature
2. Use Google Scholar



Using the Web Importer

When you have a results list in Google Scholar, click on 'Import to Mendeley' in your bookmarks toolbar. If there are multiple documents, click the green plus sign next to each reference you wish to import.

If Google Scholar can find a freely available PDF, it will place a one-click download icon next to the reference.



Import from Database

If you don't have a PDF file (or if it's unavailable) you can use the Web Importer in tandem with database searches. In Mendeley Desktop go to *Tools > Web Importer*. You will see information about the Web Importer bookmark let that allows you to import from databases.

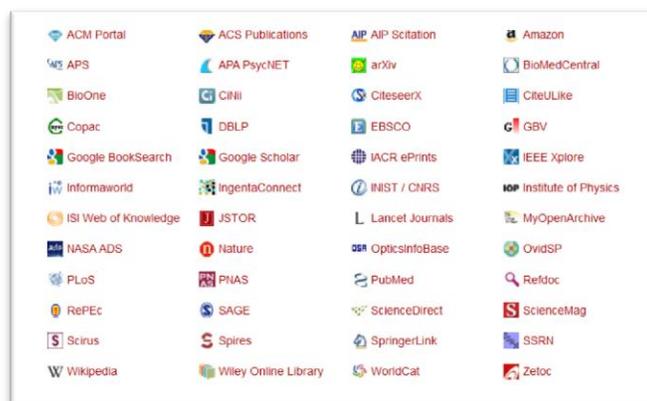
Go to the record you would like to import from a database and click on the title to view the full record. Even when there is not a PDF available, you can save the source's citation record. Click the **IMPORT TO MENDELEY**, and you will see a pop-up window that confirms the imported record.

Note: The Web Importer works with many databases that the libraries license, including other free resources such as Amazon, but it might not work with every resource. In those cases it will just take a web snapshot. You can see a support list here: <http://www.mendeley.com/import/>. If the Web Importer does not work, just download the PDF and see if Mendeley can fully recognize the PDF. Otherwise, you can choose to save the citation as an RIS or BIB file.

Locate a document: publishers supporting Mendeley

These database publishers are currently supported by Mendeley:

More information available at:
<http://www.mendeley.com/import/information-for-publishers/>



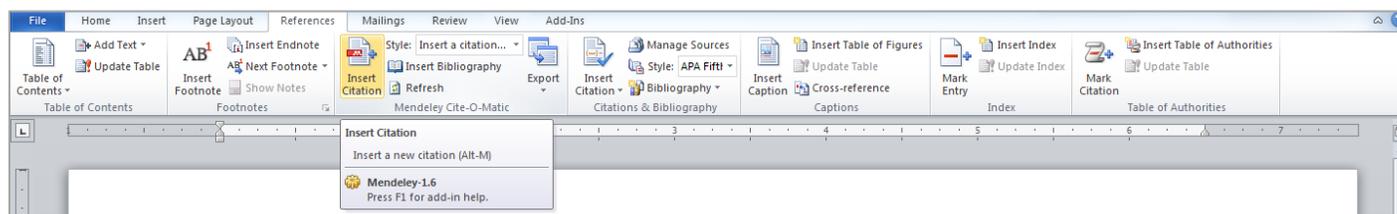
CREATING A BIBLIOGRAPHY

Once you have your documents in Mendeley, you can cite and reference them within MS Word and OpenOffice by installing plug-ins. Once installed, you will have tool bar buttons that will allow you to cite a document, generate a bibliography, or manually edit any entry.

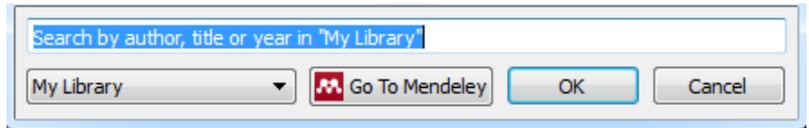
Go to *Tools > Install...* and select the plugin you wish to add.

First set your preferred citation style. This changes which style you see within the application and which style is applied when you insert citations in your paper. Within Mendeley Desktop select: *View > Citation Style*.

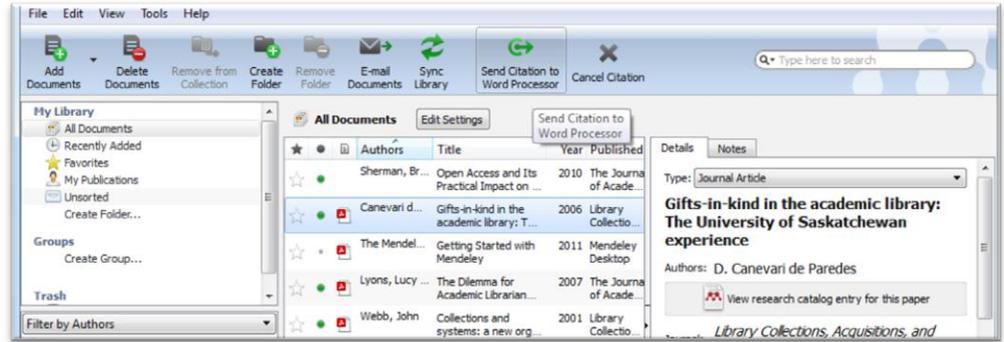
- When creating a paper, click on *Insert Citation* in the toolbar to cite a document from your Mendeley Library.
- If you are using MS Word on Windows, a box will appear allowing you to search for references by author, title or year (note that this is only available for Microsoft Word for Windows at the moment; for Word on Mac or OpenOffice, skip ahead to the second-to-last step).



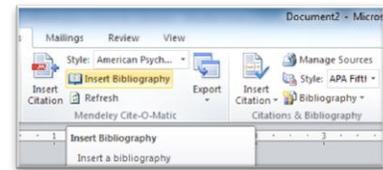
- When you find the reference you want to cite, click *OK* and you're done. You can cite multiple references by using semicolons to separate them.



- If you prefer to find references using Mendeley Desktop, press the "*Go to Mendeley*" button beneath the search box, which brings up Mendeley Desktop. Then select the document in Mendeley Desktop, and click *Send Citation to MS Word* (or *OpenOffice*). Again, you can cite multiple documents. Just hold the *Ctrl* key and left click the documents you want to cite.



- Your citation will be sent to your word processor. You can select your preferred citation style in the drop down menu in your word processor.
- Now you can generate a bibliography by clicking *Insert Bibliography*.



Quick Cite

For quick citations in most text editors, including Google Docs, select the paper you want to cite in Mendeley Desktop and click: *Edit > Copy Citation*. Then, paste it into the document you are composing. Alternatively, you can drag and drop the paper from the Mendeley Desktop window to the document, and a reference in the current selected citation style will be added there.

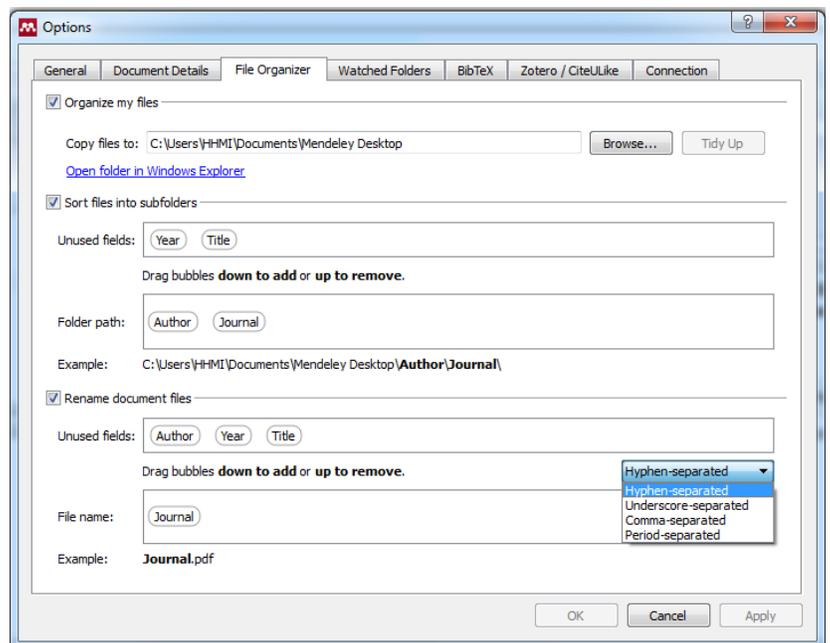
ORGANIZING YOUR LIBRARY

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. Open Mendeley's File Organizer which can be found under *Tools > Options*.

In the tab, you can select:

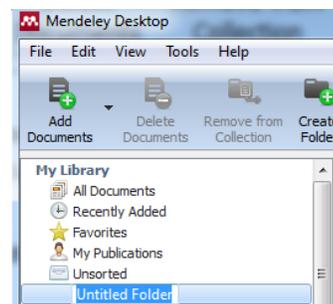
- Organize my files:** to make a copy of all documents added to Mendeley within one folder
- Sort files into subfolders:** to create a folder structure based on selected document details
- Rename document files:** to rename the often non-descriptive names of your PDFs to file names that are more meaningful, including the author, journal, year, and title



Folders

Folders are a great and simple way to keep your research in meaningful order. We recommend creating folders for your classes, projects, thesis or dissertation. You can create sub-folders, which is useful for chapter-level organization if you are writing a dissertation or book.

1. Click on *Create Folder...* to create a new folder, give it a name, and hit Return. To delete a folder use the *Remove Folder*.
2. To add a source to a folder, just select the folder, then drag and drop the source from the middle column into the folder in the left column. You can have one source in more than one folder: in other words the folders act much like labels in Gmail.
3. To remove a source from a folder, select the source and click *Remove from Collection* in the toolbar. Note that the source stays in *My Library*: it is just removed from the folder. If you would like to delete a source from *My Library* while viewing within a folder click *Delete Documents* in the toolbar. The source will be held in *Trash* until you empty it. With this workflow Mendeley keeps you from accidentally deleting a source.



If you have a more general classification, like a subject or topic that will span across multiple projects and classes, then you might want to use tags along with folders. To create a tag, select an item and enter tags into the Tags section in the right column.

SHARING AND COLLABORATING

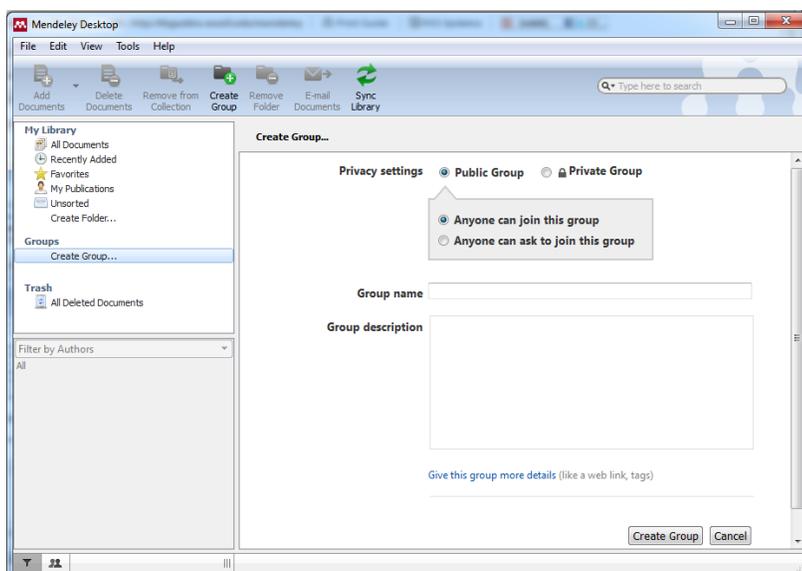
Creating Groups

Groups are a simple way for you to collaborate with your colleagues and share a collection of documents. Any member of a group may upload documents to it. You can create a group by clicking on "*Create Group*" in the left hand pane. In general, you will want to create Private groups.

Adding Members and Documents to Groups

Once you have created your group, you can add members and documents to it.

1. To Invite Members to the group go to the Members tab. You can either add people that are already your contacts on Mendeley by clicking on "*Add*" or you can invite people to join you on Mendeley by clicking on "*Invite*".
2. You can view the documents of a group by going to the Documents tab. To Add Documents, go to the group and click on "*Add documents*" in the top bar, or you can simply drag and drop them to the group.
3. To download the PDFs that other group members attach to a group, go to "*Edit Settings*" and tick "*Download attached files to group*."
Note: attached PDF files can only be shared in Private Groups, not in Public Groups.



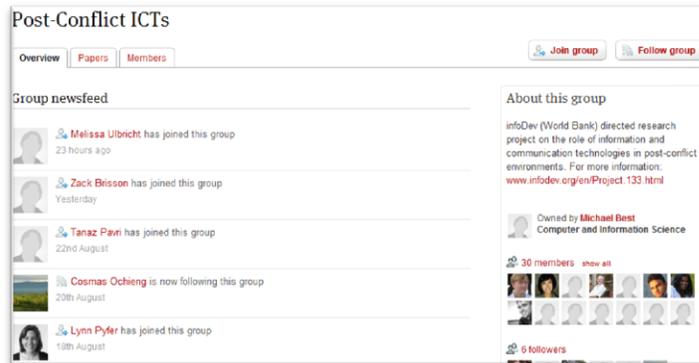
4. To upload your group with all its settings to Mendeley Web, hit the "*Sync Library*" button.

Using Groups

The overview tab shows a summary of what has happened in your Group. You can see updates on who has joined, who said what, and which papers have been added by whom.

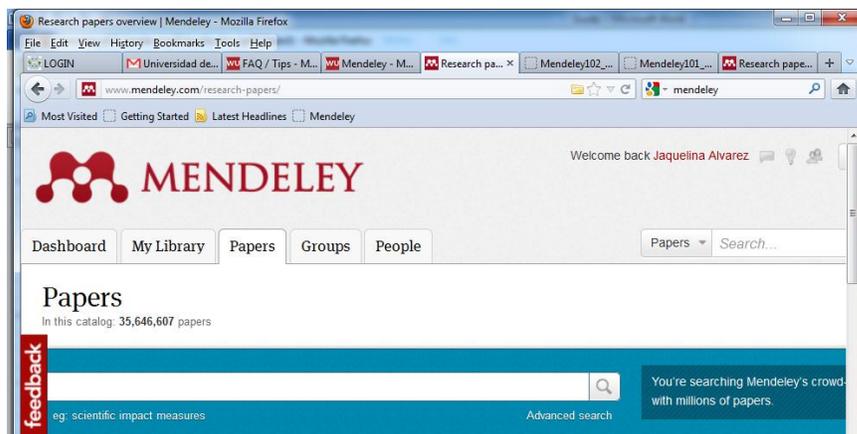
You can also post status updates by entering your update into the box at the top of the overview section.

Additionally, you can post comments and discuss your research. Just click on "comment" and start a discussion on any given topic.



Papers

Mendeley Papers is a databases of over 33 million papers created through crowd-sourcing. You can search like you would any database. In order to gain access to the actual PDFs, you need to access the section *Edit Library Access Links*. When looking at a paper, click the drop-down menu: Find this paper at > Edit library access links.



Viewing and Annotating PDFs

Annotate PDFs

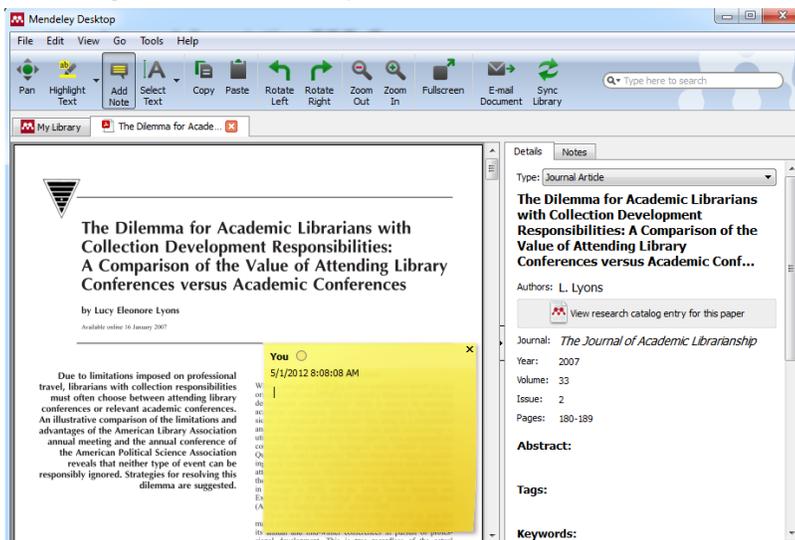
1. Open a PDF in Mendeley's PDF viewer by double clicking on it in the central pane.
2. Add highlights and notes by clicking on the *Highlight* or *Note* buttons on the menu.

Share Your Annotations

You can share your annotations with your co-workers:

1. Open a PDF that is part of a Group
2. Make your annotations
3. Sync these annotations to Mendeley Web by going back to "My Library" and clicking on "Sync Library"

Note: Your annotations are not stored in the actual PDF file, but rather in your Mendeley account. To create a new PDF file that contains all annotations, you can export the PDF with all its annotations by choosing: File > Export with Annotations from within the Mendeley PDF viewer.



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