University of Cambridge Computing Service
Mendeley: a free PDF and reference management program
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Mendeley is slightly different from other reference management software you may have come across because it was originally developed as a program for managing collections of PDF documents. This course demonstrates retrieving and using some papers from a small selection of sources, but you could just as well be working with any other source of online articles. Please stick to the suggested websites for the initial exercises as these have been tested and their behaviour should be predictable.

The first exercises demonstrate how to collect some articles by downloading from the Internet and set up Mendeley to import them automatically.

1. Downloading Journal Articles on a Home Machine

The University Library provides a downloadable browser plugin that will "proxy" browser connections to any subscription databases that are available to Cambridge University members. This makes it possible to use those databases even if you are not logged in from a University computer.

https://www.libraries.cam.ac.uk/eresources/access-full-text-anywhere

When you have the plugin installed you'll notice that some websites will pass you over to the plugin before continuing to the site, with the string ".ezp.lib.cam.ac.uk" added to the site URL.

If you would prefer not to install the plugin you should still be able to download open access articles at home but you will not be able to download subscription-only ones in the way you are able to from a machine with a direct connection to the CUDN.

An alternative is to connect via the University VPN [Virtual Private Network] so that your computer appears to be situated on the CUDN https://help.uis.cam.ac.uk/service/network-services/remote-access/uis-vpn

2.   Installing Mendeley on your own machine

Start up a web browser and go to **https://www.mendeley.com**

If you don't already have a Mendeley account, click the "Create account" link and obey the instructions to set up the account in the Cloud to which your desktop installation will synchronise.

Click the "Download" button.

Follow the prompts to download and install the program on your local machine.

3.   Set up a "Watch Folder" for downloads

Create a new folder inside Documents and give it a meaningful name (such as "Watch Folder").

4.   Search for some references online to populate your database

1. Return to your web browser and go back to Mendeley.com
2. Enter something in the search box and click search.
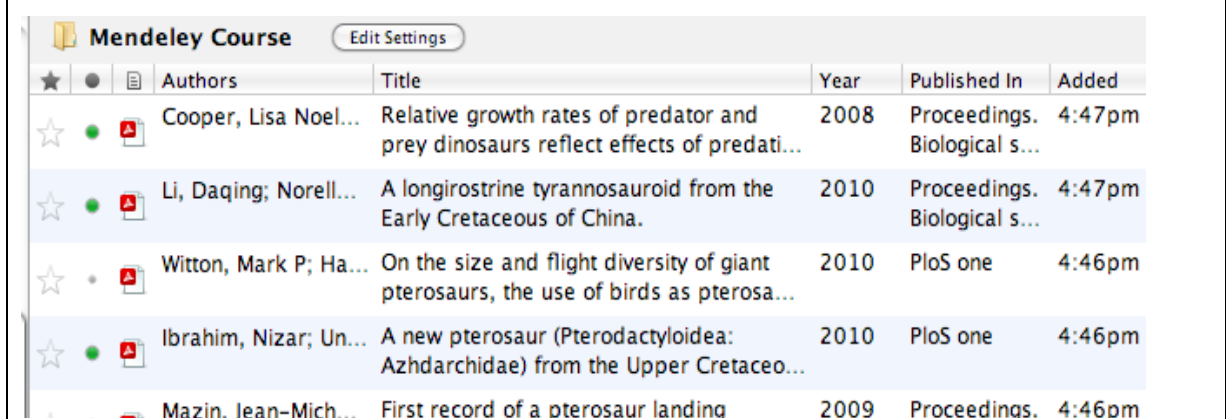3. Login to your Mendeley account (in the browser)

4. Download a few PDFs to your Mendeley Watch Folder.

5. *Add your downloaded papers to your Mendeley database*

1. Launch the Mendeley program

2. Login if the program prompts you to do so (generally it's best to accept the option to login automatically when Mendeley starts).

3. If Mendeley asks whether you want to import an existing library of downloaded PDF files skip this.

4. From Mendeley's **Tools** menu select **Options**, [**Mendeley Desktop > Preferences on a Mac**] then the **Watched Folders** tab.

5. Locate the folder with your downloaded PDF files and check the box next to it, then click **OK**.

6. Click **All Documents** to view your main library pane.

7. You'll see Mendeley add the PDFs and list their authors, title and publication details.

Tips

Don't try to simplify the process by setting the whole of **Documents** or your desktop as the watched folder as too much activity is likely to cause Mendeley to crash.

			Authors	Title	Year	Published In	Added
☆	●	📄	Cooper, Lisa Noel...	Relative growth rates of predator and prey dinosaurs reflect effects of predati...	2008	Proceedings. Biological s...	4:47pm
☆	●	📄	Li, Daqing; Norell...	A longirostrine tyrannosauroid from the Early Cretaceous of China.	2010	Proceedings. Biological s...	4:47pm
☆	·	📄	Witton, Mark P; Ha...	On the size and flight diversity of giant pterosaurs, the use of birds as pterosa...	2010	PloS one	4:46pm
☆	●	📄	Ibrahim, Nizar; Un...	A new pterosaur (Pterodactyloidea: Azhdarchidae) from the Upper Cretaceo...	2010	PloS one	4:46pm
			Mazin, Jean-Mich...	First record of a pterosaur landing	2009	Proceedings.	4:46pm

Mendeley creates reference lists by trying to extract information from the PDFs which are imported or dropped into it. Most of the time it correctly identifies Author, Title etc., but occasionally it makes mistakes —for example where a database always adds some front matter claiming copyright or noting that the article is a pre-print and may change; this information may be added to the reference fields by mistake. If the information extracted is wrong, it is usually possible to correct it by opening the PDF by double clicking its title in Mendeley then using the select and copy tools to copy the exact words of the actual title and paste into the title field of the reference.

Mendeley attempts to identify records where the extracted information may be wrong or incomplete and flags them as "Needs Review" (look for this in the left hand panel).

Searching online to complete the information.

If you click the **Search** button. Mendeley will search its catalogue of known references by title and try to complete all the fields of the reference details. If the partial reference includes a "doi" (digital online identifier) field, you can also search on this.

The ability to extract data from a PDF to create a reference item is Mendeley's strongest feature in comparison with EndNote, which can also import PDFs by drag and drop but can usually only create full references for articles which contain a valid DOI.

6. Organising your saved PDFs

Mendeley can set up a structured set of folders to store your imported PDFs and give them meaningful names.

1. Select **Tools > Options [Mendeley Desktop > Preferences]** and click **File Organizer**

2. Check "Organize my files" (by default they will be stored in Documents inside a folder called Mendeley Desktop).

3. Check "Sort files into subfolders" (by default files will be sorted into subfolders by Author and Journal, but you can change this by dragging the field names into a different order).

4. Check "Rename document files" (by default papers will be given names of the form Smith-2001-Space Stories.pdf).

5. Click OK to start the process.

Note that the stored PDFs are NOT in the same location as the Mendeley database itself.

Go to the Documents folder and open the folder called "Mendeley Desktop". You will see that it now contains folders organised by author name, then by journal and containing the PDFs renamed by author name, date and article title.

7. Updating reference details later on

If you have PDFs of articles in press which are flagged "Needs Review", it's often worth delaying accepting the details for a few months and then trying lookup by title and by **DOI** again. If the article has been published in the meantime, this will usually cause the reference details to be updated to give the publication details. Clicking the link to do a lookup by DOI will often correct title details if words with foreign accents have been imported incorrectly.

A paper's **DOI** is its **Digital Object Identifier** and is a persistent identifier which will not change over time even if the original source is moved to a different location or the publishing company is taken over by another. See **http://www.doi.org/** for more information. The DOI is not the same as a URL, although it may often be included in an object's URL for convenience.
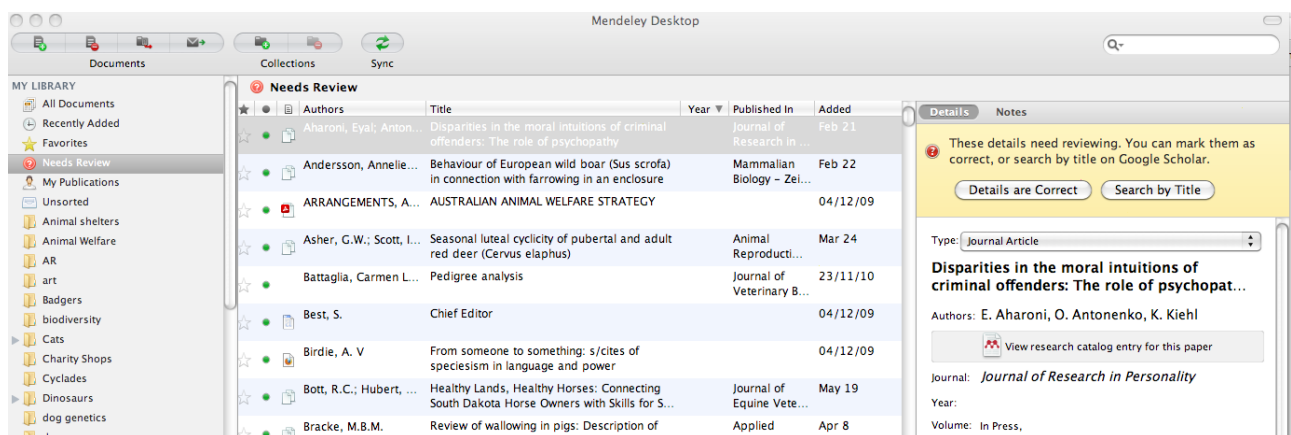
Original entry is flagged in **Needs Review** collection
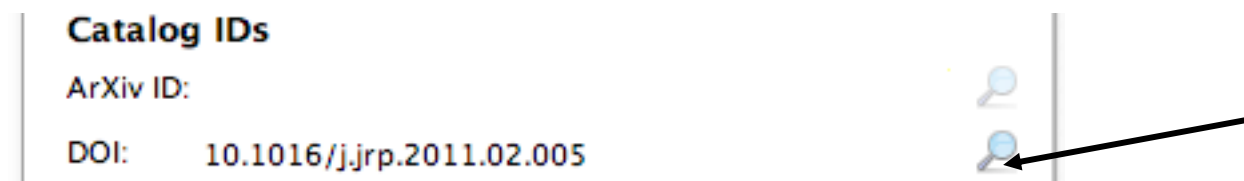
Click the search icon beside the DOI:

Disparities in the moral intuitions of criminal offenders: The role of psychopat...

Authors: E. Aharoni, O. Antonenko, K. Kiehl

 View research catalog entry for this paper

Journal: *Journal of research in personality*

Year: 2011

Volume: 45

As if by magic...

If any of your own downloads are marked as needing review, see if you can correct them by searching.

8. *Synchronising your desktop library with your online account*

When you register a Mendeley account you automatically create an online library which can be synchronised (synched) with your Mendeley desktop file. This allows a two-way transfer of references: references added to your online account can be downloaded into your desktop library and your desktop library can be uploaded to the online account. If you install Mendeley on another computer, you can re-create your library on the second computer by running the Sync process to download your reference into the new blank library.

Running sync will upload the references that you added in the earlier exercises.

1. Click the "Sync" button (near centre of top button bar). You'll see Mendeley start to upload your references.

2. Select All Documents and click the "edit settings" button. If you have the check-box selected Mendeley will upload the attached PDFs as well as the reference information.

3. Select the check-boxes "Synchronise attached files" for the moment. Be aware that this uses a lot of space and you may find that you exceed your free allocation when you use Mendeley for your own work. If you sub-divide your library using the folders option you can control the synchronisation options at folder level to reduce the amount of space used by your online account.
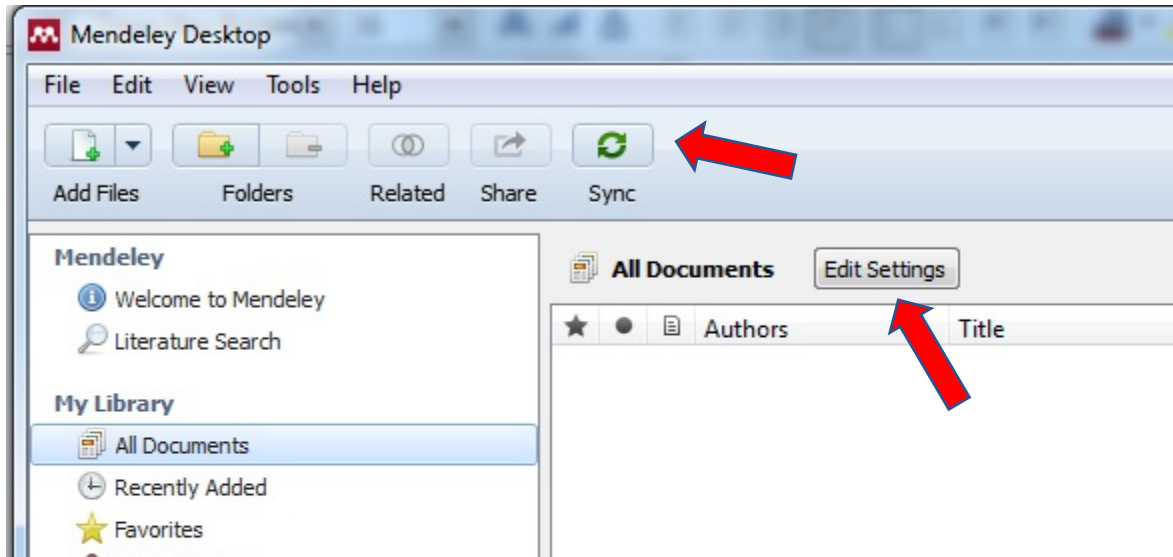
9. Save some references from Science Direct

1. Start up your web browser (if not already running).

2. Go to the address bar and enter **https://www-sciencedirect-com.ezp.lib.cam.ac.uk/** to go to Science Direct.

3. Click the "Sign in" link and authenticate with your Mendeley login if requested

4. Enter **tyrannosaurus** in the search box and click the search icon.

5. Click on one of the found items.

6. Click the Export link.

7. Click the Save to Mendeley link.

8. When prompted, sign in again.

9. Close the login tab.

10. Select "**Download PDFs if available**"

11. Click **Save**.

12. Repeat a few times until you have collected several documents.

13. Return to Mendeley and click **All Documents** (you may need to hide the settings).

14. Click the Sync button to bring down your saved references to the desktop library.

15. You'll notice that not many of the references have had PDF content added – it's generally better to download the PDF files into your watch folder and import them that way.

10. Try saving some more references from Scopus

Scopus is a citation database, not a collection of publications like Science Direct. Your search results can be saved to Mendeley, but usually won't automatically include the article PDF.

1. In your browser, go to www.scopus.com

2. Enter "Theropod" as the search term and click **Search**.

3. Select some of the found items using the check boxes.

4. Click the "Export" link and select Mendeley as the option.

5. Click "Save to Mendeley"

6. Go to the desktop application and run sync to pull them down to the local copy, however again you are likely to find that the full text isn't downloaded and it would be more effective to use the PDF download links on the site itself.

11. *Sub-dividing your Mendeley Library by topic*

You can arrange your library into folders so that references are grouped by topic. Be aware that these folders are "views" rather than containers like the folders on your computer.

If you create a folder called "Dinosaurs" with a sub-folder called "Small-Dinosaurs" and drag papers about small dinosaurs from your unsorted references into the sub-folder they will also be visible when you view the contents of "Dinosaurs". Thus it's possible to have "Dinosaurs" with sub-folders, Small-Dinosaurs, Medium-Dinosaurs and Large-Dinosaurs. All sizes of dinosaurs will be visible when you click the top-level folder, but only papers about Medium-sized ones when you click the Medium folder.

Avoid spaces in folder names as this can cause difficulties if you want to export them.

To remove a reference from a folder, right-click it. Remove from folder will remove it from that topic, but leave it in the library. Delete document will delete it altogether.

1. Within Mendeley, click **All documents** so that you are at the top level.

2. Click the plus icon in the **Create Folder** button (centre).

3. Give your new folder a name then click **All documents** again.

4. Drag some suitable references into your folder.

5. Select your folder, then click the **Create Folder** button again.

6. This will create a sub-folder within the original folder. Give it a suitable name.

7. Repeat until you have three sub-folders.

8. Experiment with dragging references into the folder and its sub-folders until you are confident that you are clear about the way it works.

12. Add an entry manually
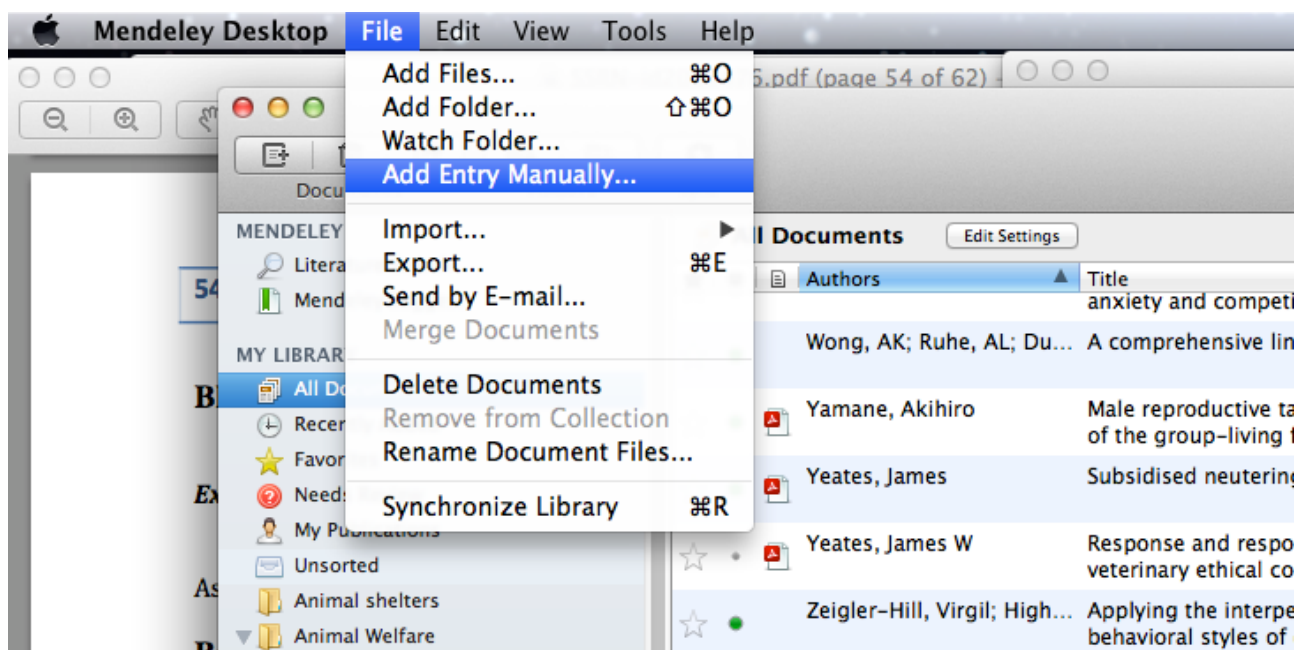
1. Select **File > Add Entry Manually...**

2. Type the reference details into the empty template record which opens.

3. If you know the DOI of the reference, you can simply copy/paste or type this into the DOI field then click the search icon beside the field to go online and enter all the other information automatically.

Use the Type: menu to select the kind of document you are referencing—for example a Book.

Different fields will be offered in the blank template depending on which type of document you have chosen—for example a Thesis would have a Department and a University rather than a publisher.

This option makes it possible to add references which you have discovered in non-electronic sources.

13. *Mendeley Web Importer*

If pop-ups have been blocked in your browser you may need to allow all pop-ups first.

This will only be successful if you have sync working correctly and is not available for all browsers. It is very effective at collecting references as you read online journals on their publishers' website but often fails to download the PDF so you may find that downloading PDFs to a watch folder is still the most efficient method.

1. Start up the Chrome web browser and go to **www.mendeley.com**. Sign in with your Mendeley account.

2. Click "**Download**" to go to the downloads page, then the link "Web importer" (near the bottom of the page, on the right)

3. Click **Get Web Importer for Chrome**.

4. Click **Add to Chrome** and, finally, **Add extension** to install the importer plugin.

5. Open a new tab or window in your browser and go to www.nature.com (this is just an example of a publisher's site that's known to demonstrate successful use of the web importer).
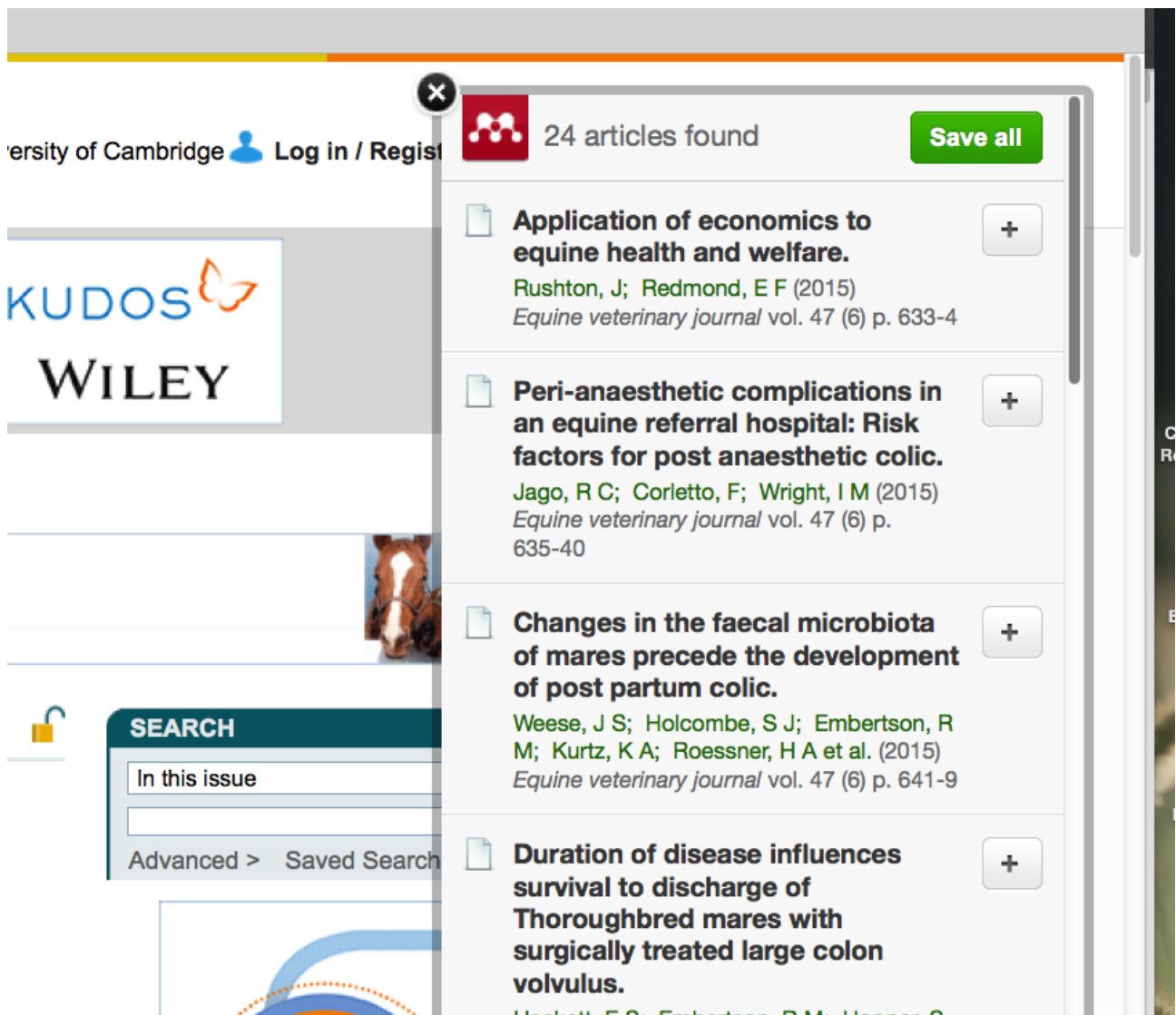
6. Click the "Save to Mendeley" button, which you just added. A pop up window will open.

7. The pop-up window should fill up with a list of all the references detected in the journal page (you may be asked to enter your credentials a second time).

8. Use the check-boxes at the side of the individual references to select the articles that you want to import. Click the **Add to Mendeley** button at the top of the pop-up to save them to Mendeley online.

9. This immediately adds the references to your online library and they will appear in your desktop library when next you run sync.
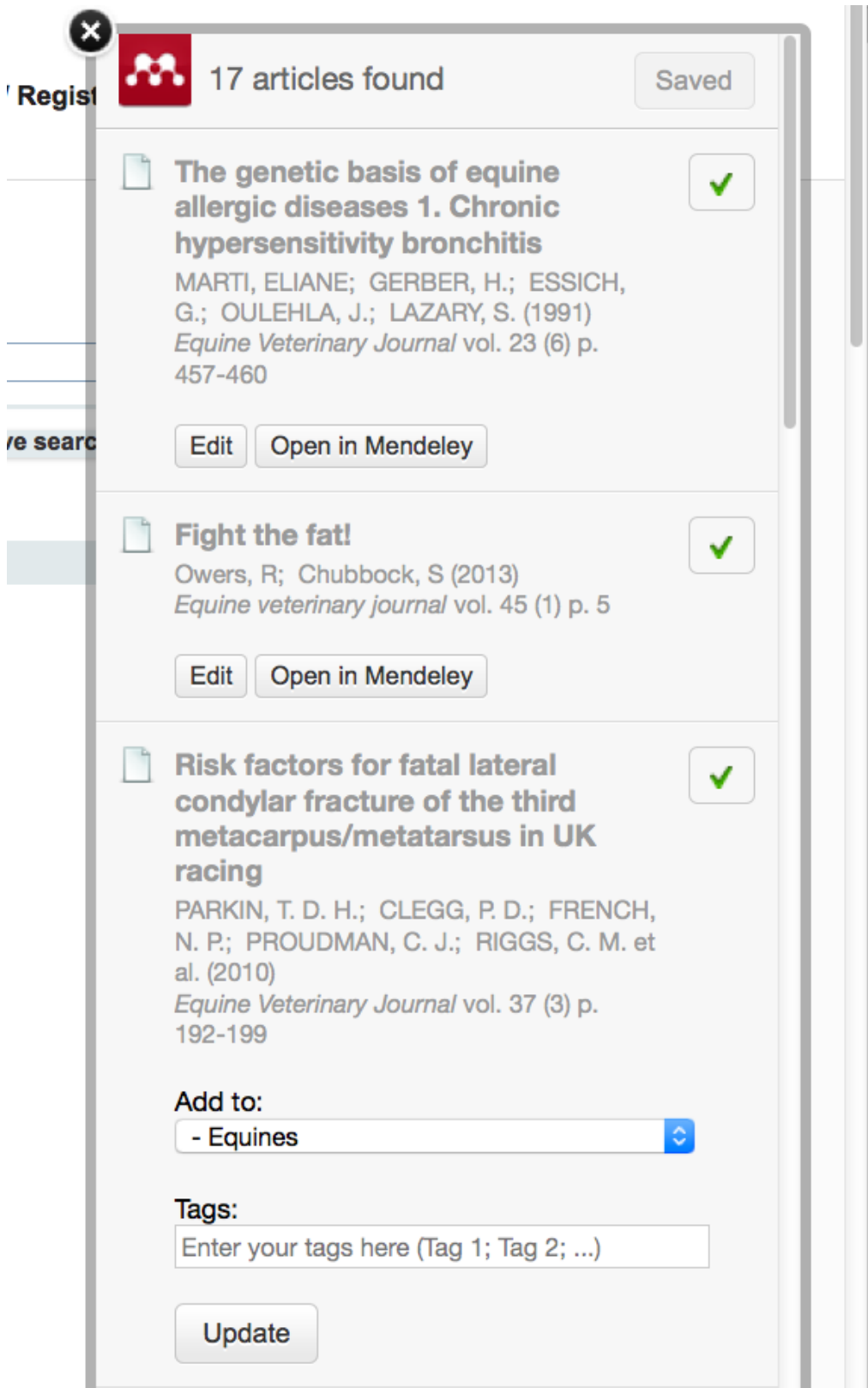
14. Using Mendeley together with a word-processing system

Mendeley can act as a citation manager and insert formatted citations into MS Word or Open Office documents.

15. Installing the word processor add-in on a personal machine

*To install the add-in on a personal machine, go to Mendeley's Tools menu and select **Install MS Word Plugin** Follow the prompts to install. There are also plugins for Libre Office and Neo Office.*

16. Inserting citations into an MS Word file

1. Start up MS Word and open a new, blank document.

2. You may get a warning that macros have been disabled. Click **enable content** to permit the Mendeley plugin macros to run.

3. Click the **References** tab to find the Mendeley tools (labelled **Mendeley cite-o-matic** under them).

4. Position the cursor at a suitable point in the document and click insert citation (left of the Mendeley tools in Word's tab).

5. Mendeley will offer a choice of searching by name or going to the database and picking the right item. Unless you have an enormous number of references it's usually easiest to go to the library and click the item wanted, so click **Go to Mendeley**.

6. Select a citation and click the "Cite" button (you may get a message asking you to return to Word).

7. In the cite-O-matic tools on the Word tab, use the pull-down menu to select a style for your references.

8. If none of the standard styles is suitable for your needs, you can find extra ones by clicking "More Styles". Click one of them and you'll see an install button appear to allow you to add it to your copy of Mendeley.

9. Insert about five different citations.

17. Create a bibliography from inserted citations

1. Position your cursor at the end of the document and type in a suitable heading, such as "References". Do a carriage return so that the heading is on a line of its own, then centre it and make it bold.

2. Put the cursor on the line following the heading.

3. Click the "**Insert Bibliography**" button in the Mendeley tools.

4. Mendeley will create a formatted bibliography containing just the references you cited in the document.

5. Try selecting another style from the pulldown menu and observe how Mendeley automatically re-formats the document.

6. Now try the effect of inserting another citation in the text. Mendeley should automatically update the bibliography adding the new reference in the correct place.

18. Exporting a formatted bibliography to a document

If all you need is a formatted list of the references contained in your library, this can very easily be achieved by exporting it to a word-processing program using drag and drop. This may not work with all word-processor programs.

1. Select the citation style you require from the View menu (View > Citation Style >)

2. Select the references you want to include in the bibliography (use control/click for non-contiguous selection).

3. Start MS Word and open a blank document. Reduce the size of the window so that Word and Mendeley are open side-by-side.

4. Drag the selected references into the open document (you'll probably need to tile your windows to make both the Mendeley and document visible together).

5. The document will now contain an ordered list of references formatted in the selected style.

19. *Using Mendeley with LaTeX (skip if you don't use LaTeX)*

BibTeX is a specialised bibliographic markup system to enable advanced reference processing with the LaTeX wordprocessing system. If you are required to produce your thesis in LaTeX then Mendeley is a good system to use to manage your references.

If you don't need LaTeX, you can skip this section.

1. Select **Tools > Options** and click the BibTeX tab. [Preferences > BibTeX tab on a mac]

2. Check "Enable BibTeX syncing" and "Create one file for my library".

3. Browse to "Documents" as the location where you want to keep the exported BibTeX file. Create a folder called MendeleyBib, select it and Click OK.

4. Mendeley will now create a BibTeX library file (unimaginatively named library.bib) and keep it updated whenever new material is added to the Mendeley master library. Library.bib is a normal BibTex file except that any edits you apply manually will be over-written when Mendeley next runs. Except for this, you can make use of it with a LaTeX document exactly as you would if you'd created it by typing in the data.

Library.bib is a plain text file and you can open it with any suitable text editor.

Individual entries are laid out as in the example below:

> @article{Bates2009a,
>
> author = {Bates, Karl T and Manning, Phillip L and Hodgetts, David and Sellers, William I},
>
> doi = {10.1371/journal.pone.0004532},
>
> issn = {1932-6203},
>
> journal = {PloS one},
>
> keywords = {Animals,Computer Simulation,Dinosaurs,Dinosaurs: anatomy \& histology,Fossils,Image Processing, Computer-Assisted,Lasers,Models, Anatomic},
>
> month = jan,
>
> number = {2},
>
> pages = {e4532},
>
> pmid = {19225569},
>
> title = {{Estimating mass properties of dinosaurs using laser imaging and 3D computer modelling.}},
>
> url = {http://www.pubmedcentral.nih.gov/articlerender.fcgi?artid=2639725\&tool=pmcentrez\&rendertype=abstract},
>
> volume = {4},
>
> year = {2009}
>
> }

To insert a citation in your main document — in this case the file tyrannosaur.tex — you need to complete the following steps:

1. In Mendeley, right-click on the article you want to cite and choose "**copy as > LaTeX citation command**".

2. Paste the key into your LaTeX document at the point where you want the citation to appear.

3. End the file with commands to set a bibliography style and insert a bibliography using your BibTeX file as follows:

\bibliographystyle{amsplain}

\bibliography{library} %%Your library.bib file

\end{document}

This style will replace your reference key cites with numbers in square brackets and generate a numbered bibliography at the end of the document.

If you get unexpected error messages, check carefully that you have no spelling errors in the commands. It is very easy to make slight mistakes in copying and pasting long commands like "bibliographystyle"'.

If you want to print all the items in your BibTeX file without citing them in the body text, you need to put the \nocite{*} command immediately before the bibliography style command.

A dummy file such as :

\documentclass{amsart}
\begin{document}
\nocite{*}
\bibliographystyle{amsplain}
\bibliography{mybibliography}
\end{document}

can be used to print out the whole BibTeX file with no preceeding text.

20.   Sources of references and journal articles

Science Direct and Scopus are convenient sources of references for use with Mendeley because of the ability to save direct to Mendeley. You may find it more convenient to save PDFs to your watched folder to ensure that you retrieve the full text as saving direct to Mendeley doesn't always locate the associated PDF files. You can use any electronic reference database, although some of them will only let you download one PDF at a time. You can either download to the watch folder or drag and drop PDFs into Mendeley's central pane.

If you have an entry with a reference but no PDF and subsequently locate this, you can easily attach it to the existing reference by clicking the **Add File** button in the reference details pane.

21.   Sync and backup

Once you've created an account, Mendeley automatically synchronises your library with the online account. If you install Mendeley on a different computer and enter your account details, it will automatically download your stored references to the second computer.

If you make use of Mendeley's "single-click" web importer tool, you will notice that it initially imports the reference into your online library and only puts it in your desktop library when next you sync.

You need to be clear that syncing is NOT the same as backing up your data: if you make a mistake and delete something you didn't intend to, the mistake will also be synchronised (as it is the most recent change). It's important that you also make periodic backups of your work so that you can reinstate the last good copy in case of disaster.

To make a backup copy of your database, go to Mendeley's **Help** menu (select the menu, not the Help button) and choose "**Create Backup**". This will prompt you to select a location where the backup file should be stored.

In case of disaster, you can go back to the Help menu and choose **Restore Backup**.

It is advisable to copy the backup to a memory stick or upload to cloud storage in case the computer itself is damaged or stolen. Make sure you copy BOTH the database backup and the folder of stored PDFs.

NB make sure you are clear about the 3 folders which relate to Mendeley:

- Watch Folder – the folder you created as the destination for downloads which you wish Mendeley to import automatically

- Mendeley Desktop – Mendeley's working directory where your imported and organised PDFs have been stored.

- Backup.zip (or similar) – the folder containing your emergency backup.

The contents of the Watch Folder can be discarded periodically, but deleting the contents of Mendeley Desktop will remove the stored PDF files from your library.

You also need to bear in mind that the online data that you sync may be stored on a machine outside the EU, so if any of it could be classed as "personal" you might be in breach of the Data Protection Act.

22.   Using Mendeley with Word Online

Elsevier have released an app that makes it possible to cite directly into Word Online or "Click to Run" versions of Word (Office 365 for desktop shouldn't be a problem).

1. To install the Mendeley app in **Word Online** go to https://appsource.microsoft.com
2. Enter **Mendeley** in the search box to locate **Mendeley Cite**

3. Click the **Get it now** link. You'll need to login to your Microsoft account and accept the Terms and Conditions and you'll be guided through the process to install Mendeley Cite in your OneDrive online space.

4. To launch the application, open a Word Online document and click the **References** tab.

5. Mendeley Cite should appear on the right of the tab contents and will launch and try to login to Mendeley if you click it.

6. You should see a panel containing the references in your Mendeley library which can be cited by selecting them using the check boxes then clicking the **Insert** button.

7. Position the cursor at the point where you want to insert your bibliography and click **More > Insert Bibliography** on the Mendeley Cite panel to create your bibliography.

8. When you add more citations to the document they should be automatically added to the bibliography as well. If the bibliography fails to update you may need to select the **Refresh** option.

23.   Further help

If you want more individual help, email: **service-desk@uis.cam.ac.uk**

The website Cite Them Right Online **https://www.citethemrightonline.com** is an authoritative guide to effective referencing and is well worth reading through if you are unsure about citing unusual sources. To access it you need to start from the UL's electronic resources page as it is subscription-only.

It has a menu system that will let you select from a variety of common styles to view tailored advice.

Web pages with individual authors

Here are the guidelines for referencing an organisation or an individual's web page according to the Vancouver referencing style.

Citation order:

- Author
- Title of internet site
- [internet]
- Year that the site was published/last updated
- [cited year month day];
- Number of screens or pages
- Available from: URL

Example

Reference list

Macmillan Cancer Support. Lung cancer. [internet]. 2012 [cited 2012 Aug 23]; [29 screens]. Available from: http://www.macmillan.org.uk/Cancerinformation /Cancertypes/Lung/Lungcancer.aspx

NB For **web pages** where no author can be identified, you should use the title of the web page.

You try Help

Italicise

Author. Title of internet site. [internet]. Year that the site was published/last updated [cited year month day]; [Number of screens or pages]. Available from: URL.

Email

Vancouver

Vancouver

You're viewing the **Vancouver** referencing system.

To learn more about using the Vancouver referencing system, try the resources below.

Vancouver: general guidance

- Vancouver: guidelines
- Top ten tips
- How can you avoid plagiarism?
- How do I reference a source quoted in another author's work? (Secondary referencing)
- What is common knowledge?