Mendeley

Mendeley Reference Manager

A guide for new users

February 2021

ELSEVIER

Simplify your referencing, accelerate your research

Mendeley Reference Manager simplifies your referencing so that you can spend more time researching.

Store, search, organize, note, share and cite from just one reference library. Offering time saving efficiencies, Mendeley Reference Manager enables you to reduce your workload and advance your research goals.

This guide shows you how to:

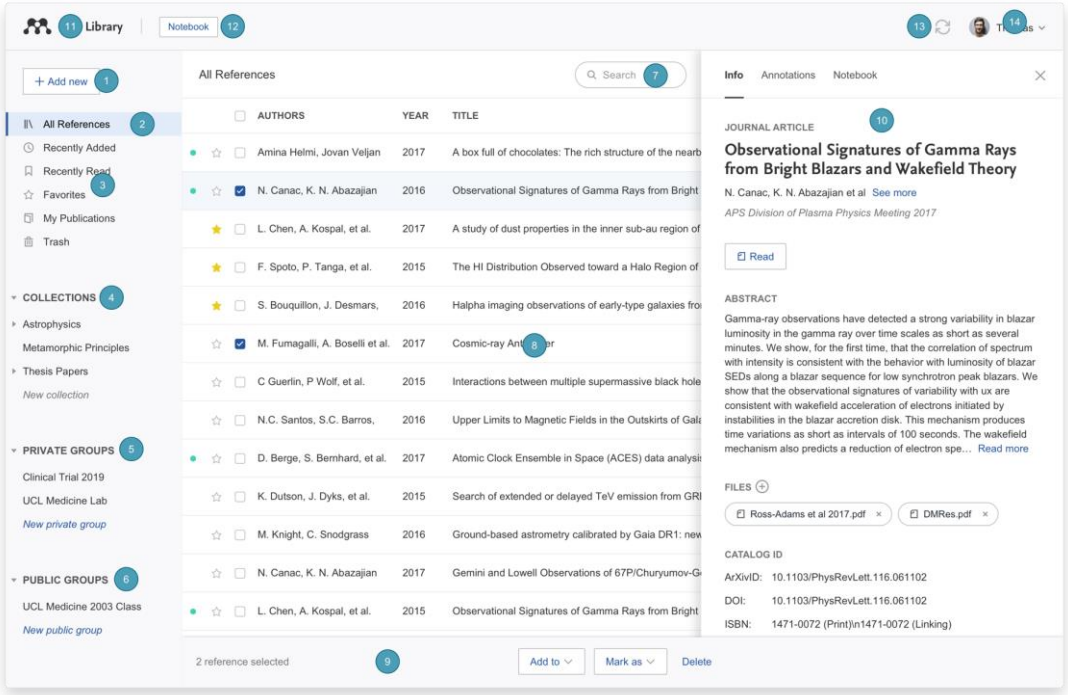
1. Navigate Mendeley Reference Manager
2. Build your Mendeley library
3. Insert citations into your Microsoft® Word document
4. Access your Mendeley library anywhere
5. Organize and find references in your Mendeley library
6. Highlight and annotate PDFs
7. Keep your highlights in one place
8. Share references with other researchers

Get started

> Download Mendeley Reference Manager desktop at mendeley.com/download-reference-manager

> Access Mendeley Reference Manager web at mendeley.com/reference-manager

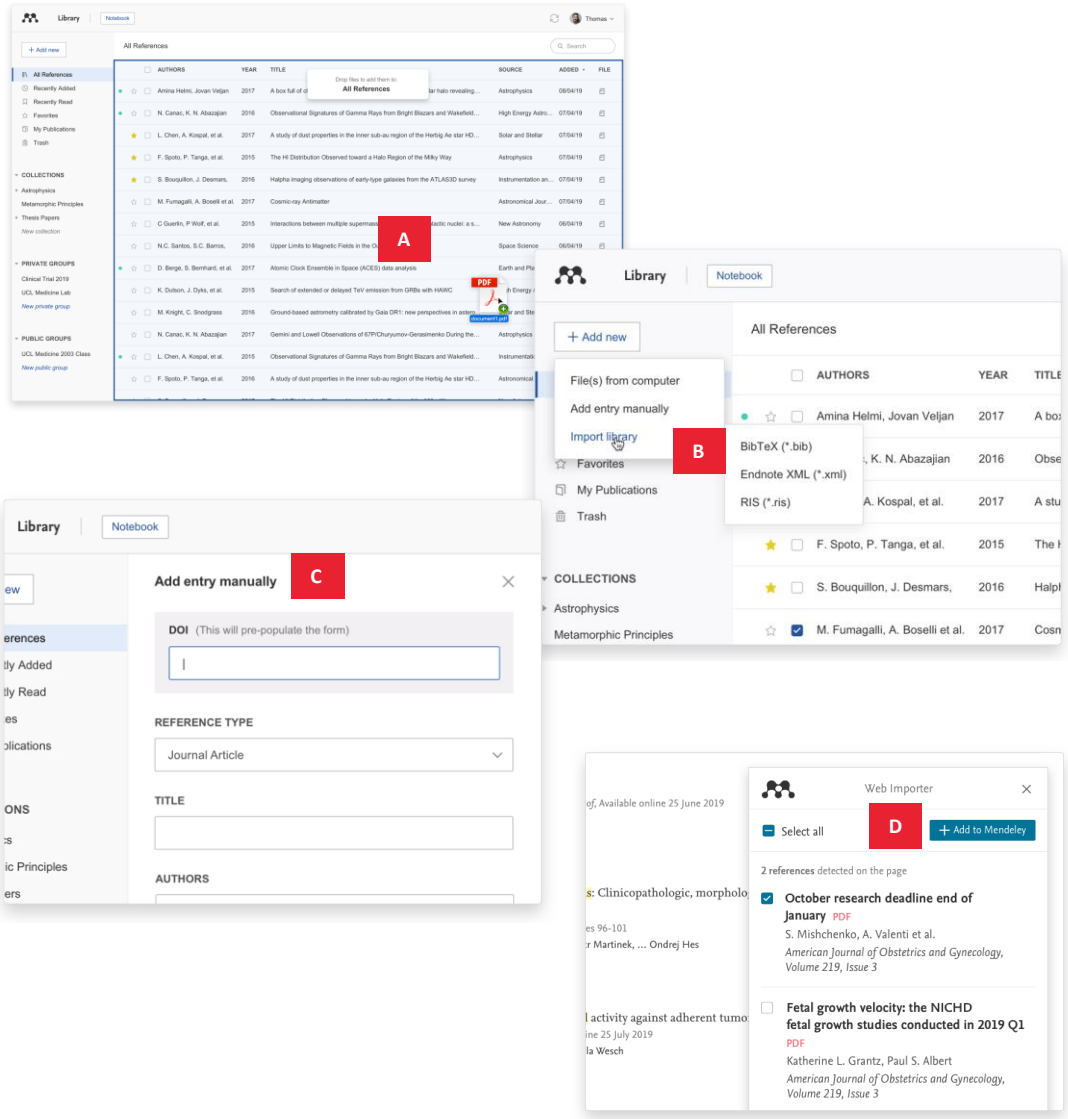
Navigate Mendeley Reference Manager



1. **Add new** - Add new references to your library
2. **All References** - Return to your library
3. **Smart Collections** - Mendeley Reference Manager automatically organizes aspects of your library into smart collections
4. **Custom Collections** - Keep your references organized in custom collections
5. **Private Groups** - The private groups you have created or joined
6. **Public Groups** - The public groups you have created or joined
7. **Search** - Search your library
8. **Library table** - All of the references in your selected collection or group
9. **Action panel** - Select the check box next to a reference in the library table to bring up the action panel
10. **Info panel** - Select a reference in the library table to view the metadata in the info panel
11. **Library** - Return to the main library view
12. **Notebook** - Keep all your thoughts in one place
13. **Sync** - Mendeley Reference Manager automatically syncs any changes you make to the cloud
14. **Profile** - Access your online profile page, access support or sign out of your account

> Find out more about your Mendeley library in our Help Guides

Build your Mendeley library



Build a library to keep all your references in one place, where you can easily organize and find them.

To get started with your Mendeley library, import references using a variety of methods:

A. Drag and drop PDFs from your computer
Mendeley automatically captures author, title and publisher information.

B. Import files from your computer
- Select and add locally stored references.
- Import locally stored RIS, BibTex or EndNote XML files.

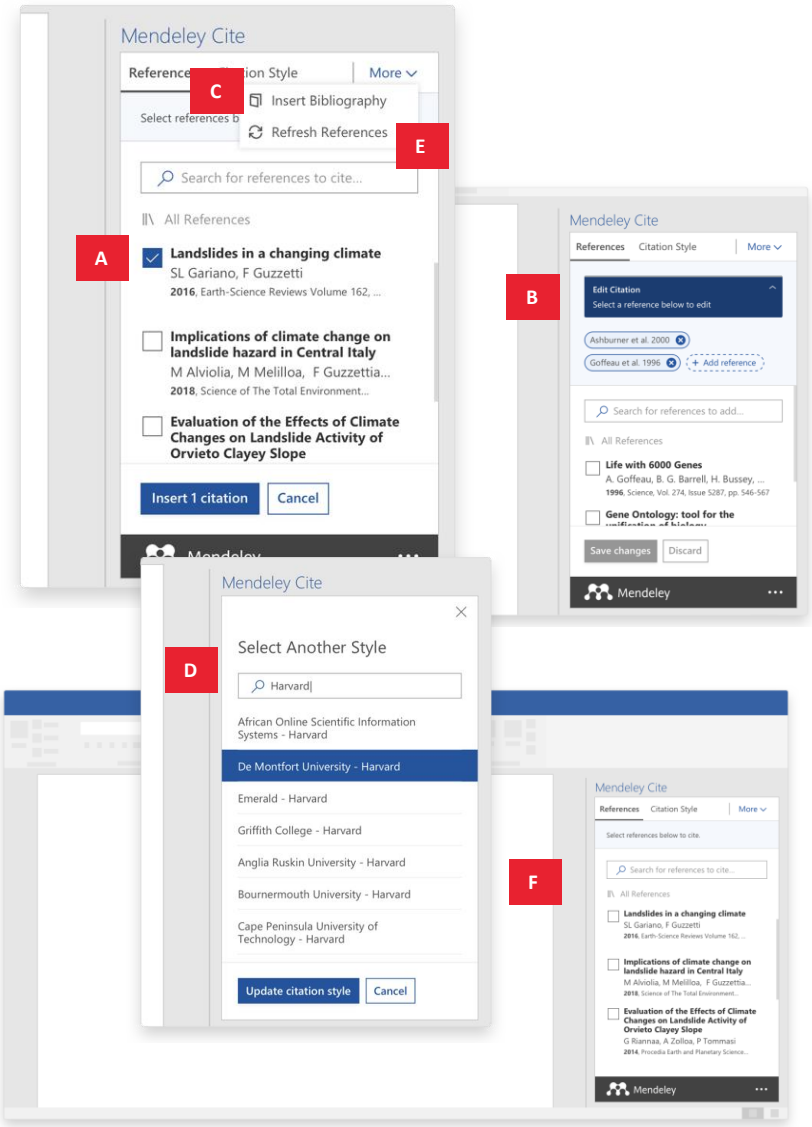
C. Manually create an entry
If you enter the DOI into the appropriate field Mendeley automatically looks up the details for you.

D. Import content from the Internet using Mendeley Web Importer
Mendeley Web Importer detects article identifiers on the page you are viewing and automatically retrieves metadata and PDF full texts (where available) for you to add to your library.

Mendeley Web Importer is supported for the following browsers:
- Google Chrome
- Mozilla Firefox
- Microsoft Edge

> Find out more about adding references to your Mendeley library in our Help Guides

Insert citations into your Microsoft® Word document



Add citations and bibliographies to a Microsoft Word document.

Use the Mendeley Cite add-in for Microsoft Word to generate citations and bibliographies in just a few clicks:

A. **Find and insert individual or multiple references into your document**
Search for references in your Mendeley library and insert them into your document with a single click. You can do this for individual or multiple references.

B. **Edit a reference in a citation**
Edit references within a citation you have already created. Add values to specific reference attributes, provide a prefix/suffix or suppress the author name.

C. **Generate a bibliography**
Generate a bibliography from the references you've cited.

D. **Choose your preferred citation style**
Select from thousands of different citation styles. Search and select your preferred style to automatically update your references and bibliography.

E. **Refresh references**
Refresh the references in your document to update them with any changes you have made to your library.

F. **Cite seamlessly**
Have your Mendeley library and Microsoft Word document open side by side. You can also use Mendeley Cite without Mendeley Reference Manager being open or even installed.

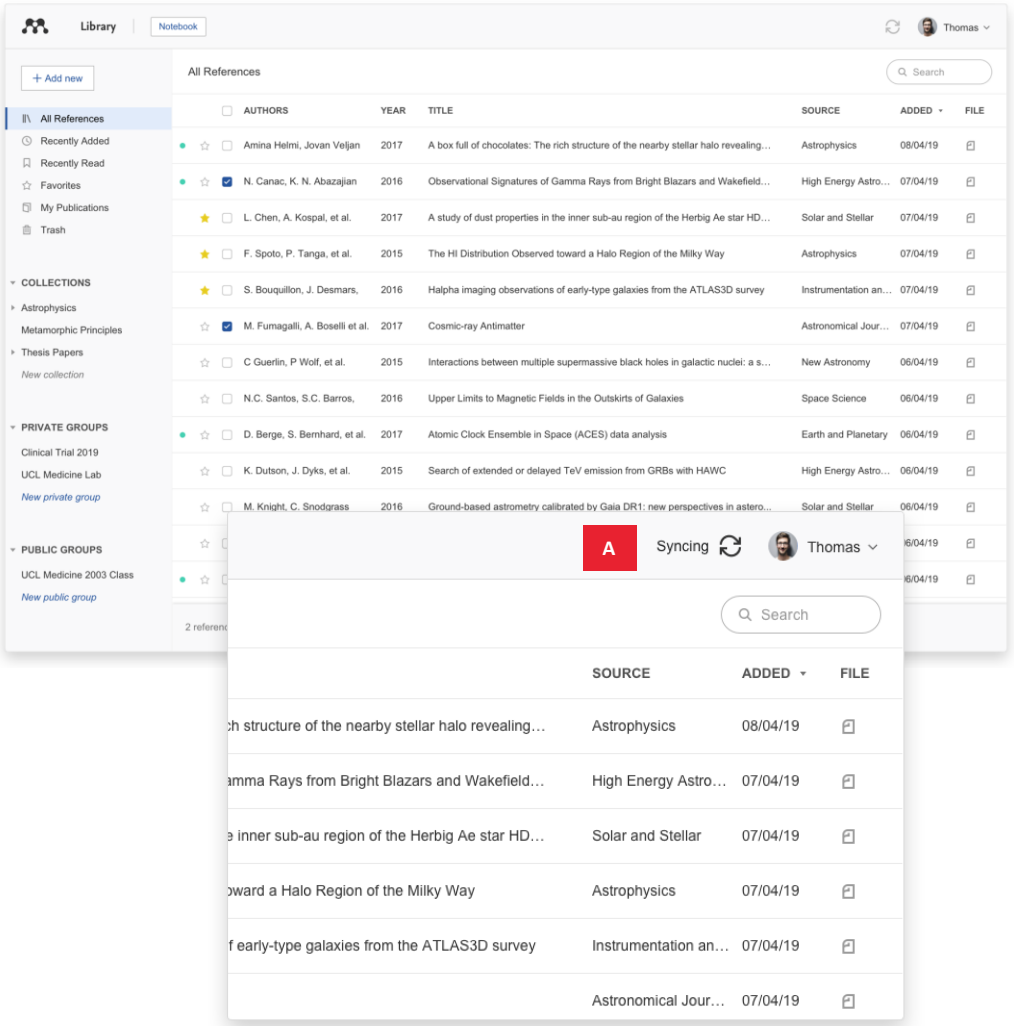
Mendeley Cite is compatible with Microsoft Word 2016 or above, Microsoft Online, Microsoft Office 365 and the Microsoft Word app for iPad®.

Get Mendeley Cite BETA at mendeley.com/cite/word/install

> Find out more about using Mendeley Cite in our [Help Guides]

ELSEVIER

Access your Mendeley library anywhere



Continue your research work whenever you need, wherever you are.

You can securely access documents in your Mendeley library using the desktop application or any Internet browser. The two versions are identical in look and functionality, and real-time sync automatically saves any changes:

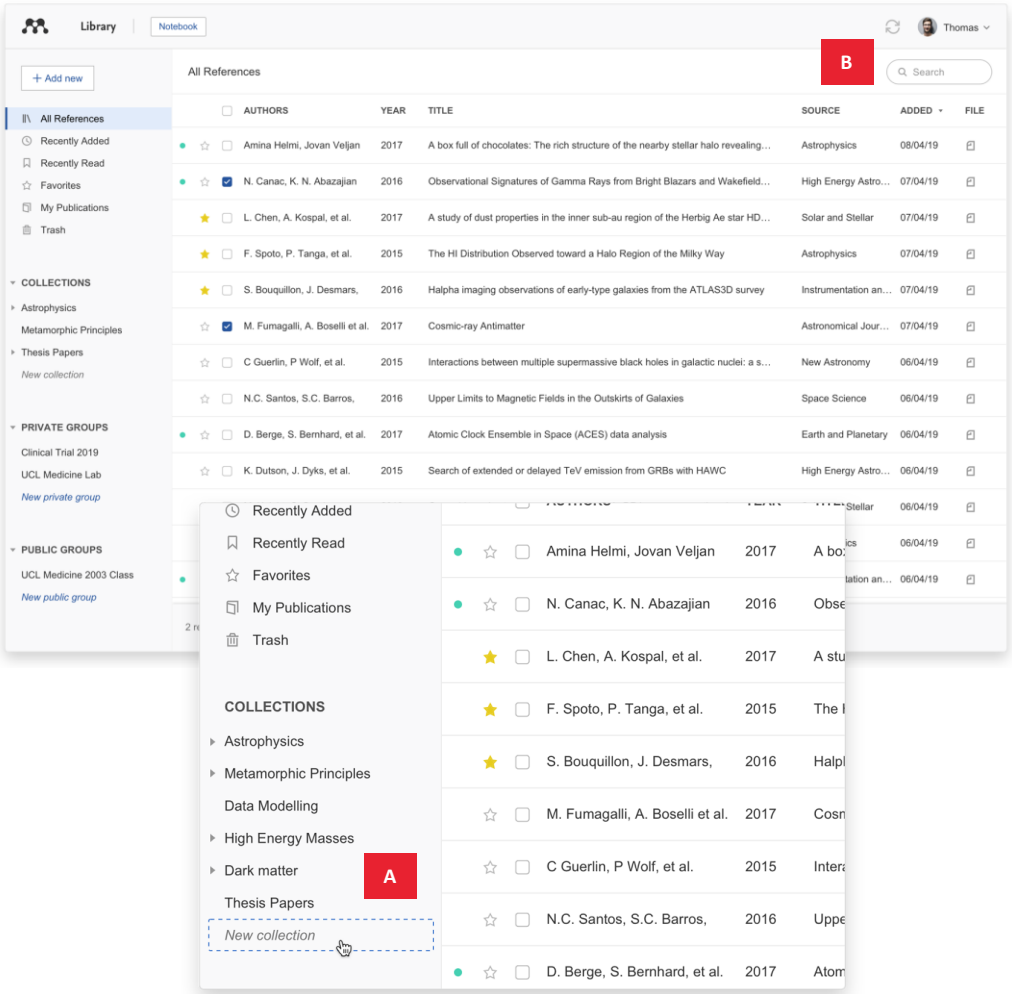
A. Know you're up to date
Your library automatically syncs with its backup in the cloud whenever you add references or make changes, seamlessly keeping everything up to date. This means you see the same library through the desktop and **web version** of Mendeley.

B. Read where you want
Set your library to be available offline and work where you want.

> Find out more about syncing in our Help Guides

ELSEVIER

Organize and find references in your Mendeley library



Keep your library organized and quickly find the references you need.

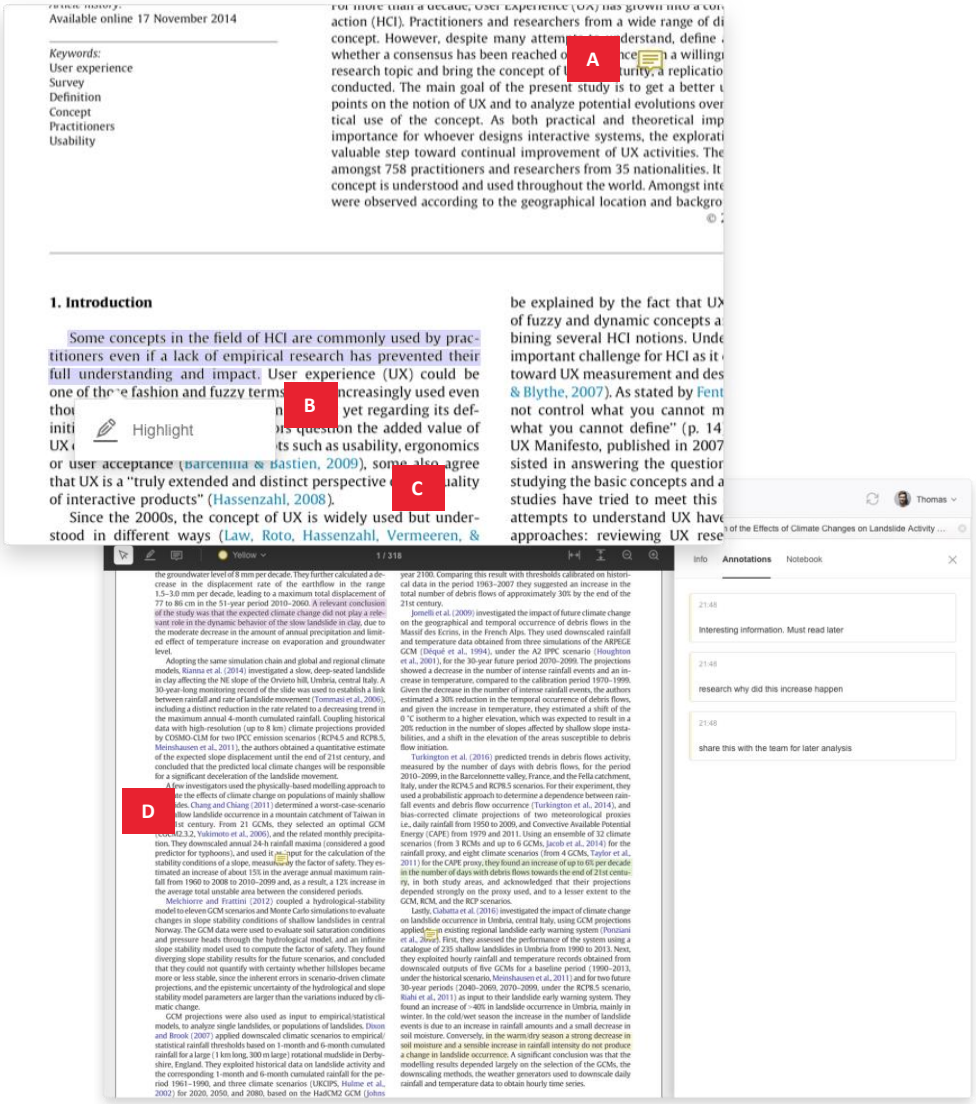
Save time when looking for references by organizing them into Collections and using the search tool in your Mendeley library:

A. Organize your references
Use Mendeley's smart collections or create your own custom collections of references to keep your research interests separate.

B. Search your references
Enter a search term into the search field and Mendeley will return the appropriate results. Mendeley searches by author, title, year and source.

> Find out more about searching and organizing your references in our Help Guides

Highlight and annotate PDFs



Capture your thoughts on the PDFs you're reading.

Quickly and easily add highlights and annotations to PDFs using Mendeley's annotation tools:

A. Annotate PDFs
Record your thoughts as you read PDFs by creating a sticky note.

B. Highlight text
Highlight key pieces of text so you can find them later. Differentiate your highlights with different colors.

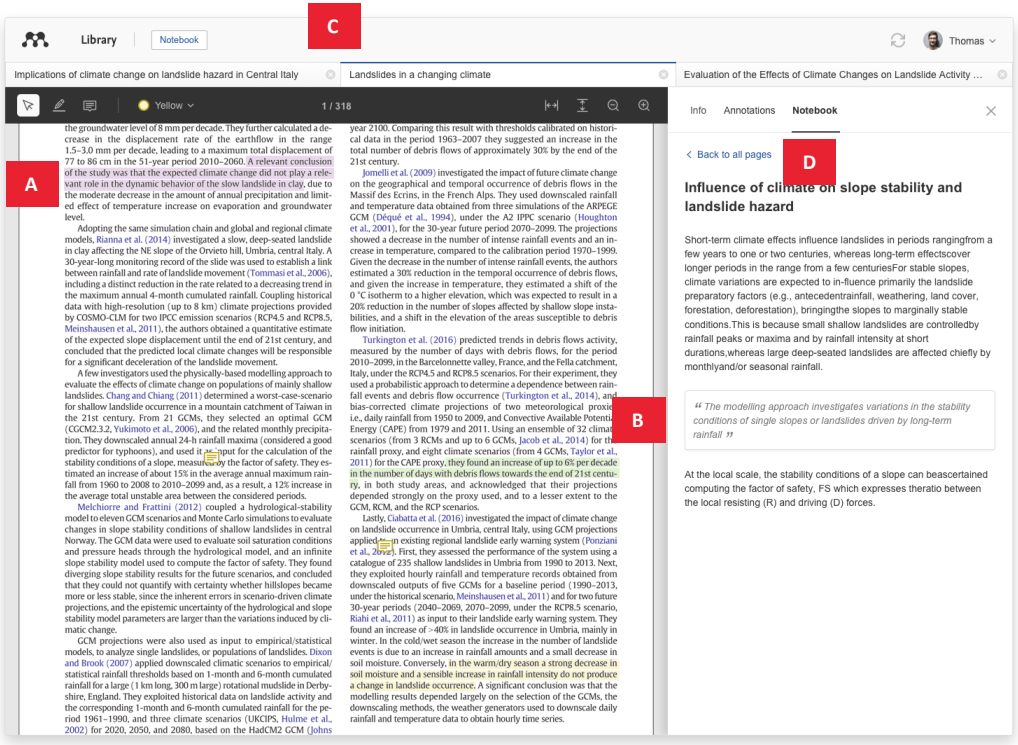
C. Work on multiple PDFs
Have multiple PDFs open at once and easily switch between them thanks to Mendeley's multi-tab format.

D. Pick up where you left off
Mendeley remembers where you reach in a document and opens your PDFs in the same location on all devices.

> Find out more about annotating your PDFs in our Help Guides

ELSEVIER

Keep your highlights in one place



Collect together all the highlights and comments you make across multiple PDFs.

You can keep your thoughts in one place using your Mendeley Notebook:

A. **Have all your highlights in one place**
Add any highlighted text from a PDF to your Notebook in just one click.

B. **Refer back to the original PDF**
Navigate back to the source of any highlight by selecting it in your Notebook.

C. **Work across papers**
Keep the same Notebook page in view while switching between PDFs.

D. **Create multiple Notebook pages**
Make as many Notebook pages as you need

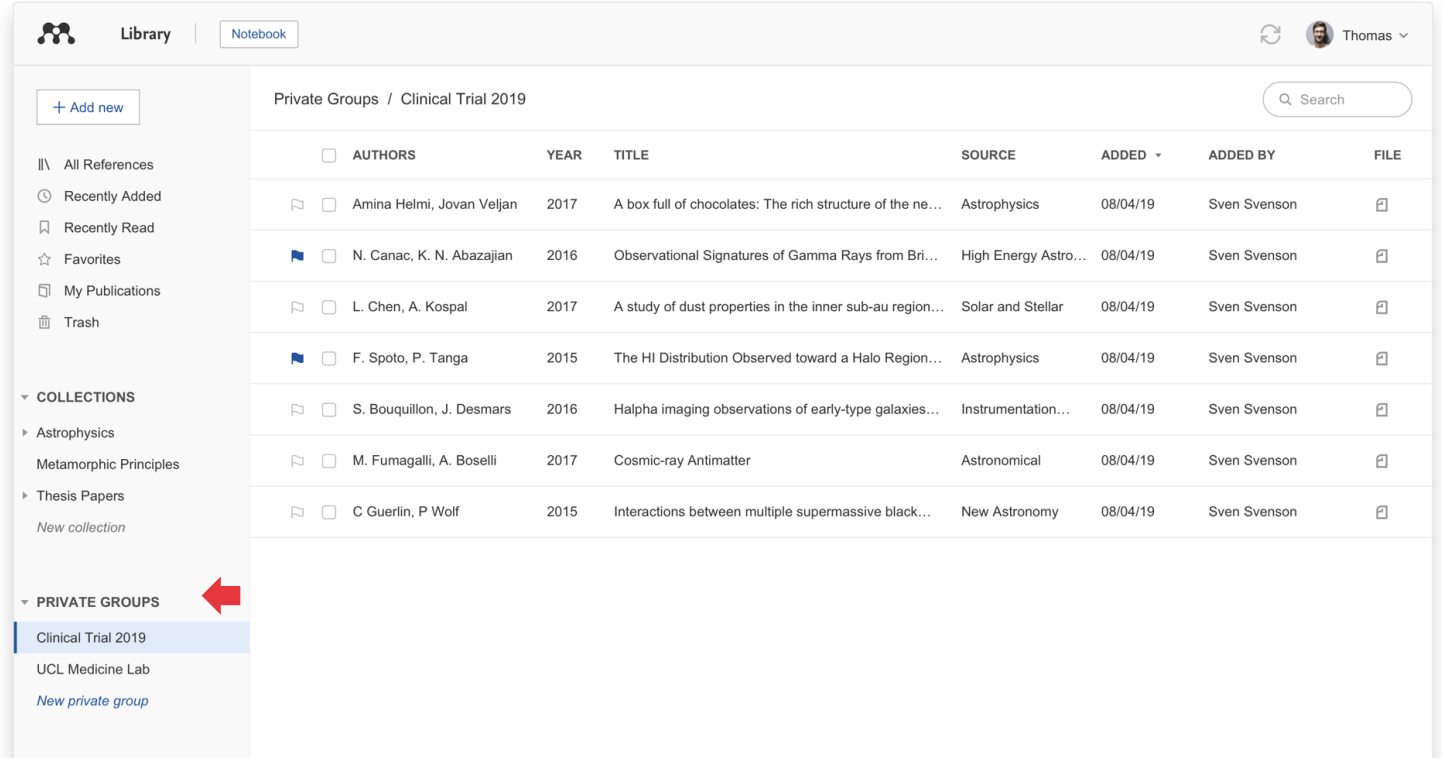
> Find out more about your Mendeley Notebook in our Help Guides

Share references with other researchers

Collaborate with others by sharing references and new ideas within Groups.

With **Private Groups** in Mendeley Reference Manager you can:

- Share documents and references with small teams.
- Groups are managed. Managers invite members to join through Mendeley.
- Teams can share PDFs and collaborate using shared annotations.



> Find out more about sharing references in our [Help Guides]

Next steps

> Download Mendeley Reference Manager desktop at mendeley.com/download-reference-manager

> Access Mendeley Reference Manager web at mendeley.com/reference-manager

Need more help?

Visit the Mendeley Support Hub at service.elsevier.com/app/home/supporthub/mendeley to find a range of FAQs on using Mendeley's reference management solutions. Alternatively, you can contact us through any of these channels:


Email


Chat


Mendeley Support Twitter


Facebook

Stay in touch

Hear about the latest news and updates from Mendeley by following us at any of these channels:


Team Mendeley Twitter


Facebook


LinkedIn


Mendeley Blog

Watch this space!

To ensure Mendeley Reference Manager always supports your workflow as effectively as possible we will be releasing new features and improved functionality every two weeks. Find out about the most recent releases at mendeley.com/release-notes-reference-manager.

ELSEVIER

Become a Mendeley Advisor

If you are a Mendeley lover who wants to share the benefits of using Mendeley, join our Mendeley Advisor program!

The Mendeley Advisors serve as the Mendeley representative on campus and help us keep the user community thriving.

What Mendeley Advisors do

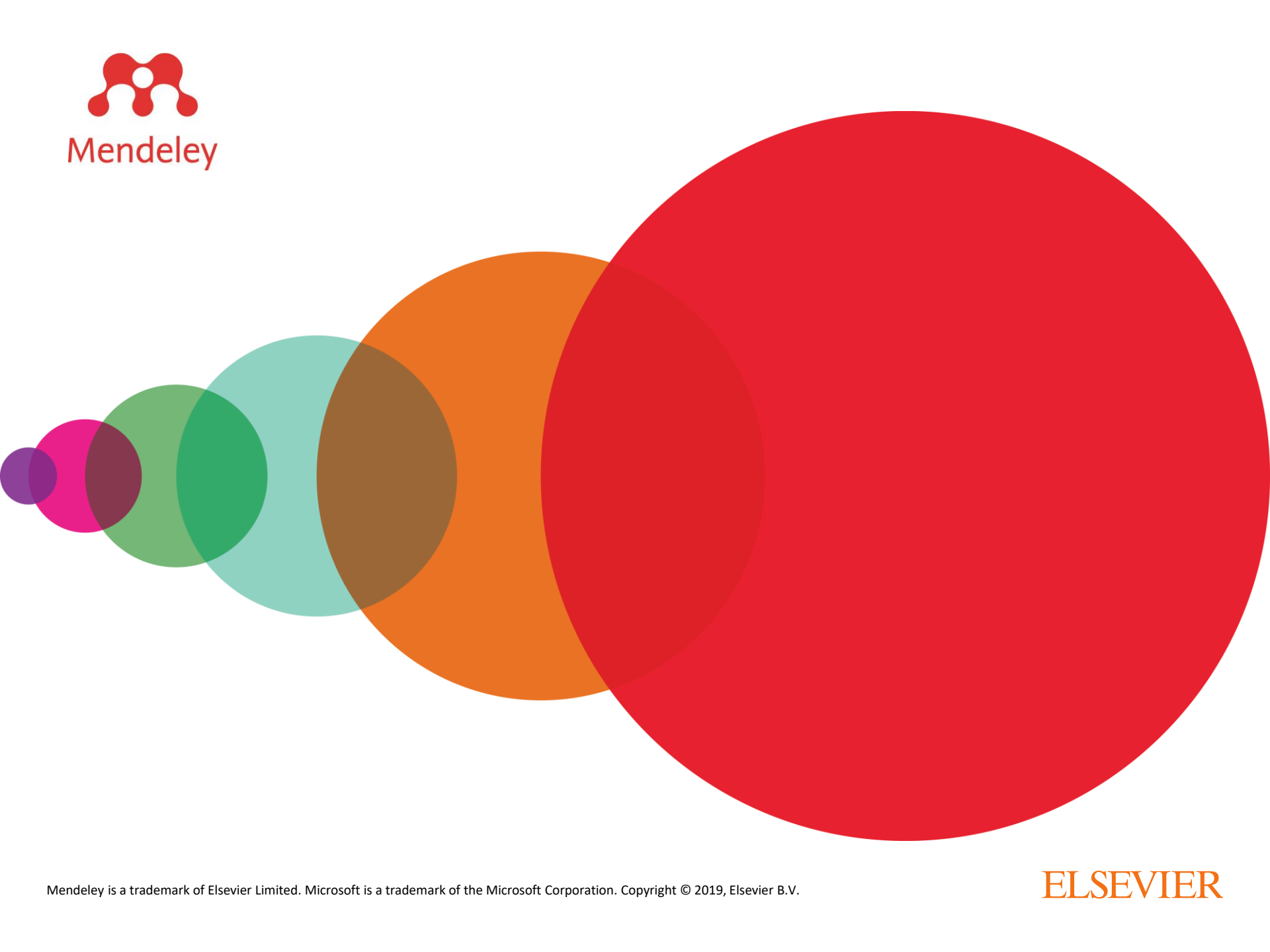
Mendeley Advisors spread the word about Mendeley and good reference management. Here are some of the things that our current Advisors do:

- Run Mendeley workshops
- Include Mendeley in their curriculum
- Wear Mendeley t-shirts
- Post about Mendeley on social media including LinkedIn, YouTube and Twitter
- Anything else you can think of!

Mendeley Advisors are our hands on the ground, helping potential users connect with our solutions. We also consult with Advisors to understand the needs of users and to help us develop new features. They're the first group of users we consult when we are considering adding a new functionality to the product.

> Want to learn more about Mendeley Advisors? Read our Advisor of the Month column or apply on our Mendeley Advisor webpage.

www.mendeley.com/advisor-community



ELSEVIER