Mendeley

Mendeley Reference Manager

A guide for new users

October 2019

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Simplify your research workflow

Considerable time and effort can be spent building and organizing your reference library, finding your references and notes when you need them and formatting citations correctly. The new Mendeley Reference Manager helps simplify these tasks, leaving you time to focus on achieving your goals.

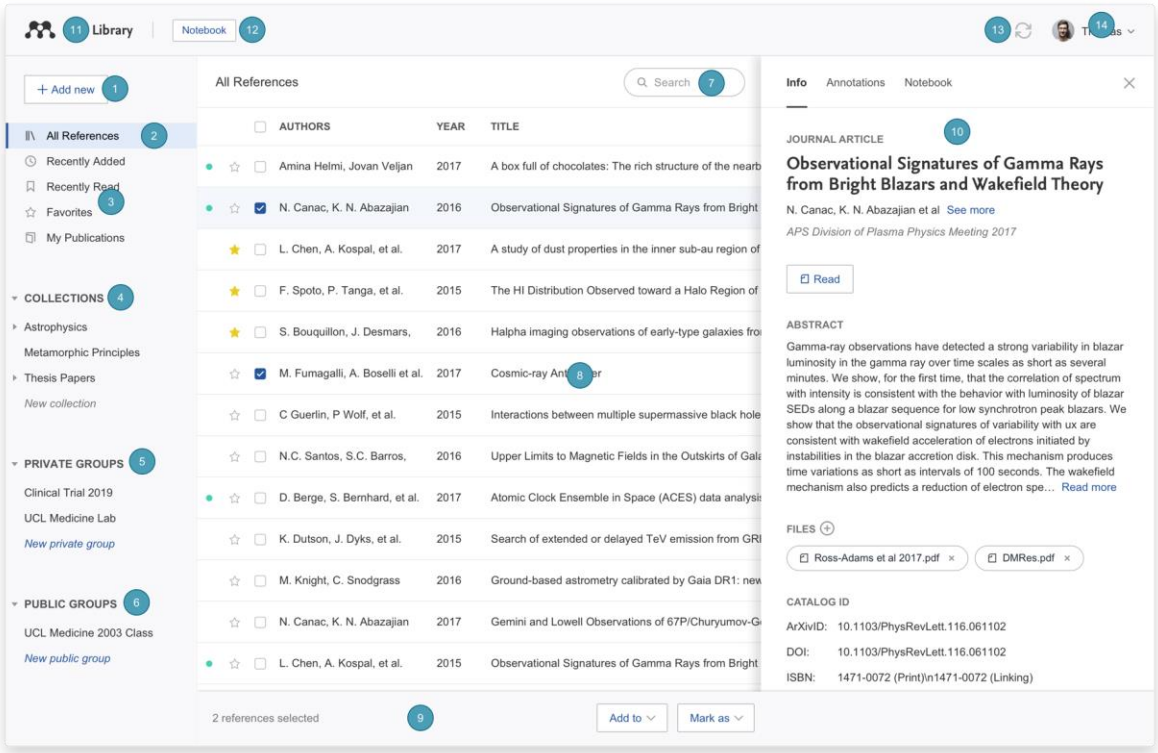
This guide shows you how to:

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

Watch this space!

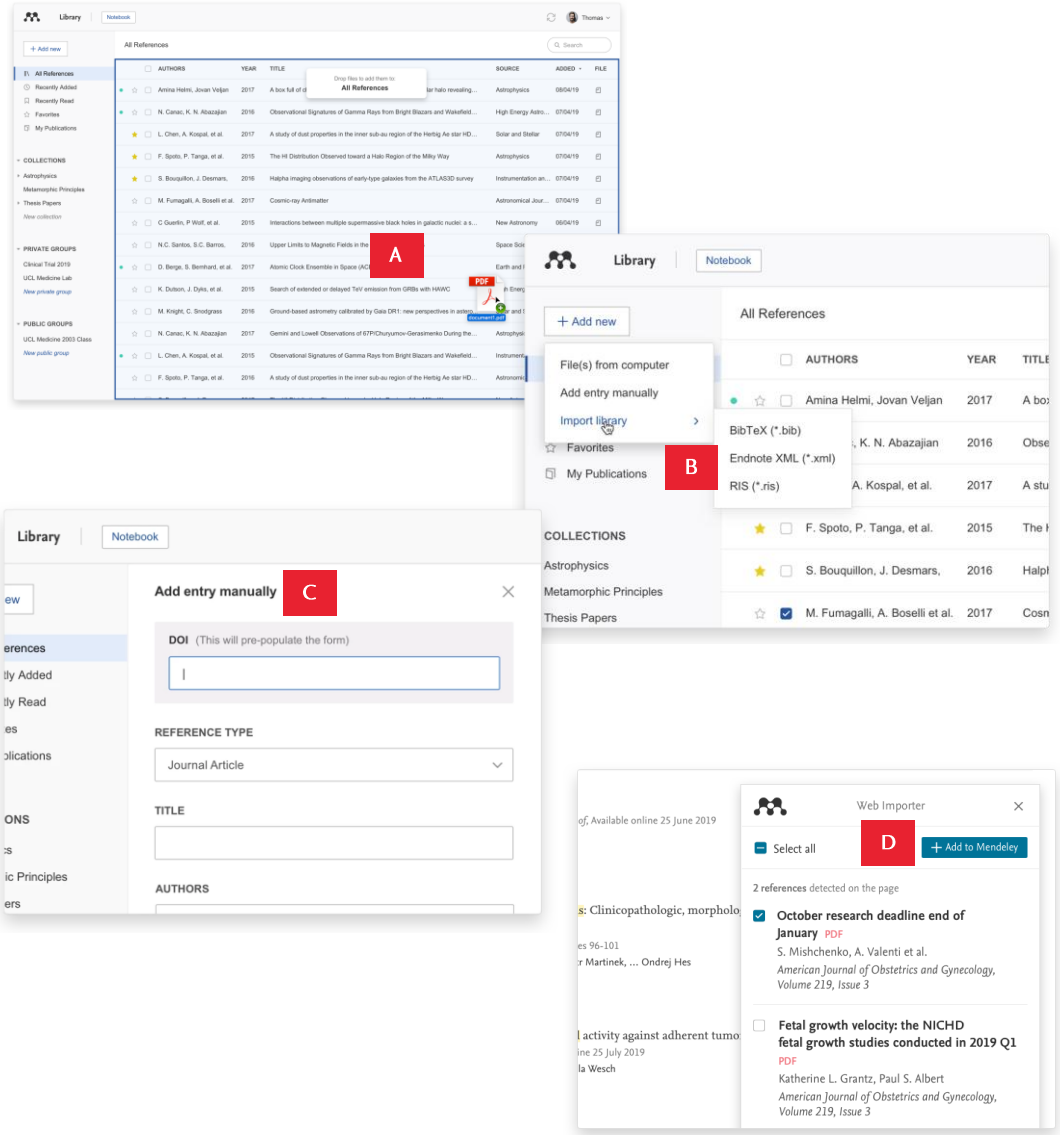
To ensure Mendeley Reference Manager always supports your workflow as effectively as possible we will be releasing new features and improved functionality every two weeks. Find out about the most recent releases at www.mendeley.com/release-notes-reference-manager.

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

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.

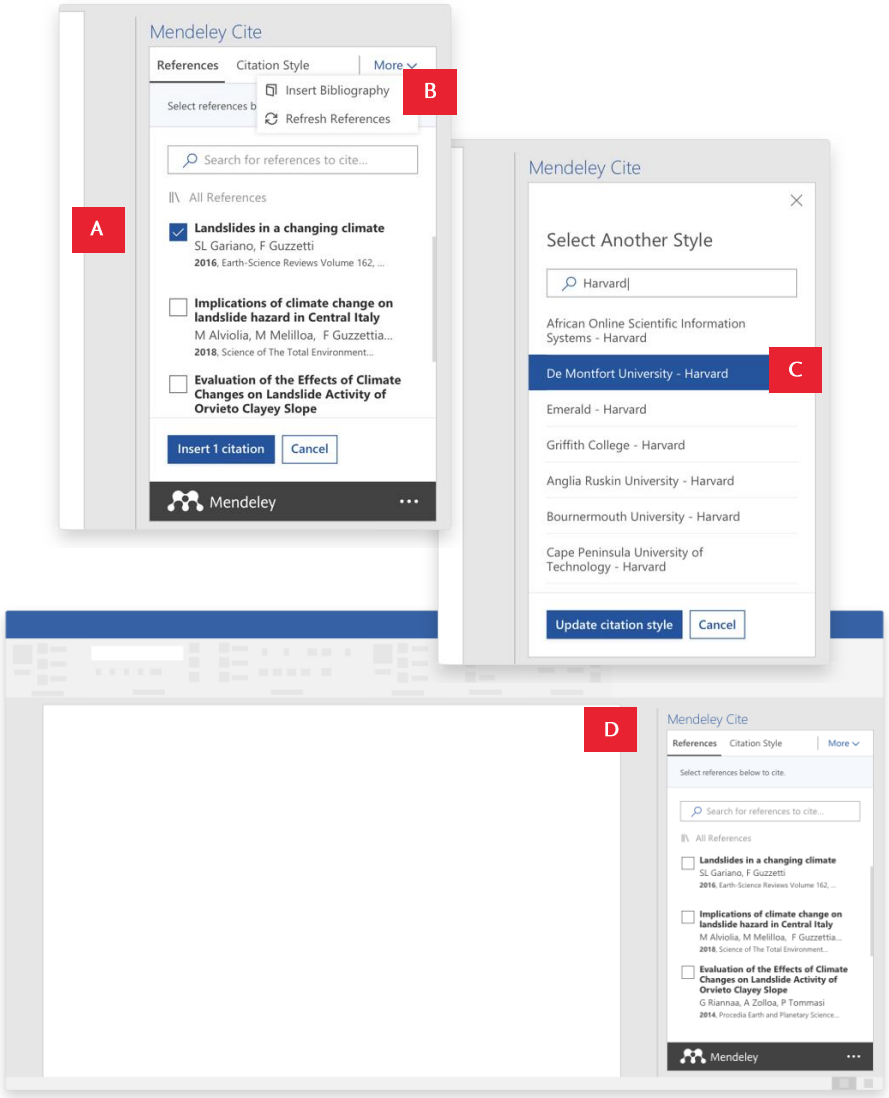
B. **Import files from your computer**
- Select and add locally stored references.
- Import locally stored RIS, BibTex or EndNote XML files.

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**
Install Mendeley Web Importer from the Chrome Web Store.

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.

Insert citations into your Microsoft® Word document



Add citations and bibliographies to a Microsoft Word document you're writing.

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

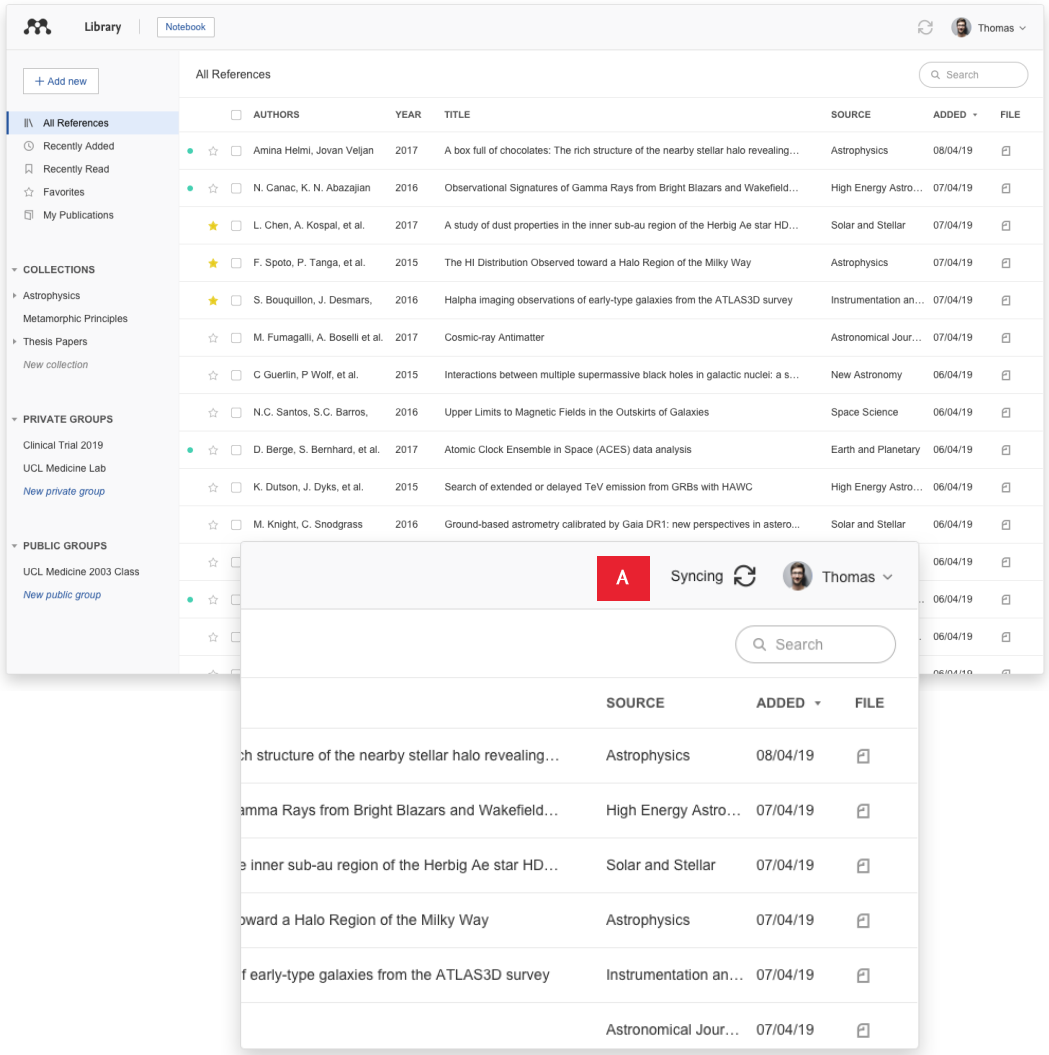
C. **Choose your preferred citation style**
Select from thousands of different citation styles. Search and select your preferred style to automatically update your references and bibliography.

D. **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 versions 2016 and above, with the Microsoft Word app for iPad® and with Microsoft Word Online.

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

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. 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 browser versions of Mendeley.

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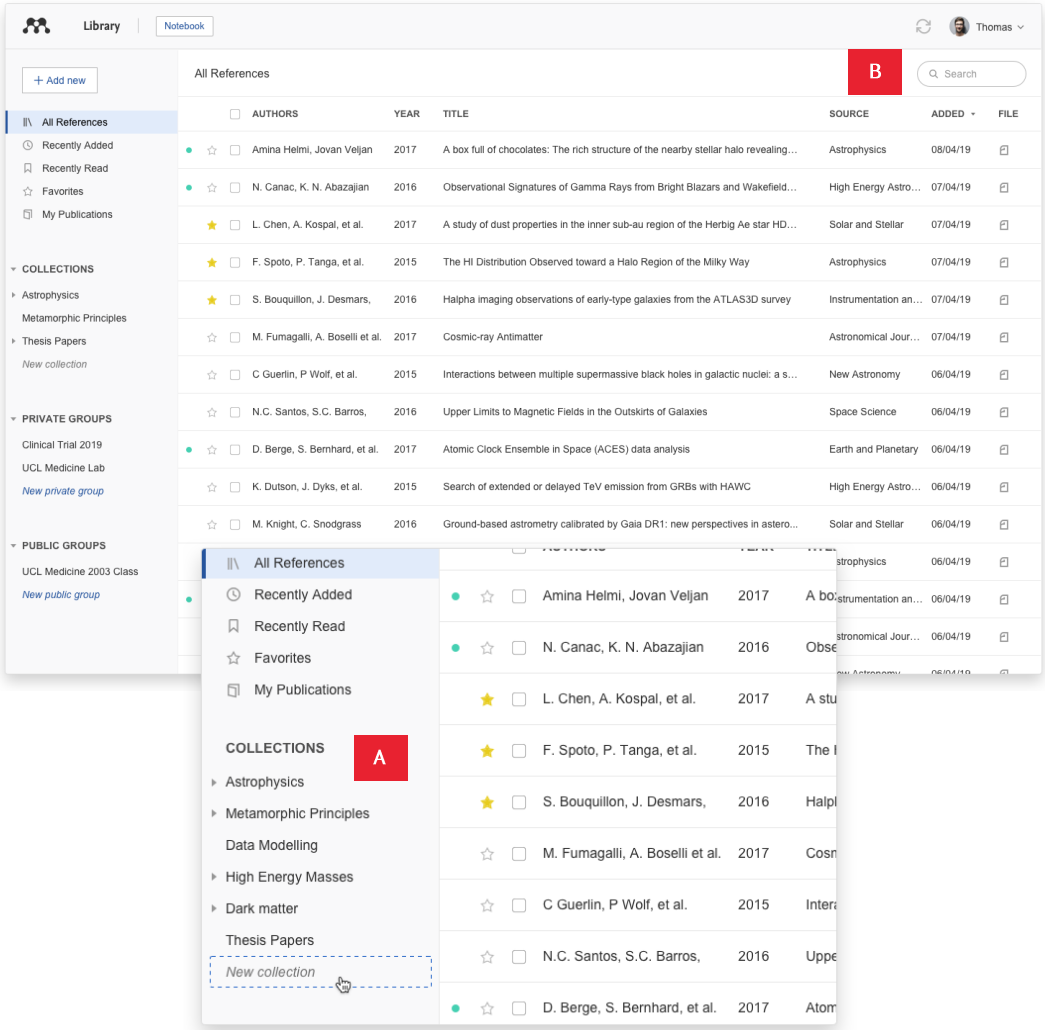
Organize and find references in your Mendeley library



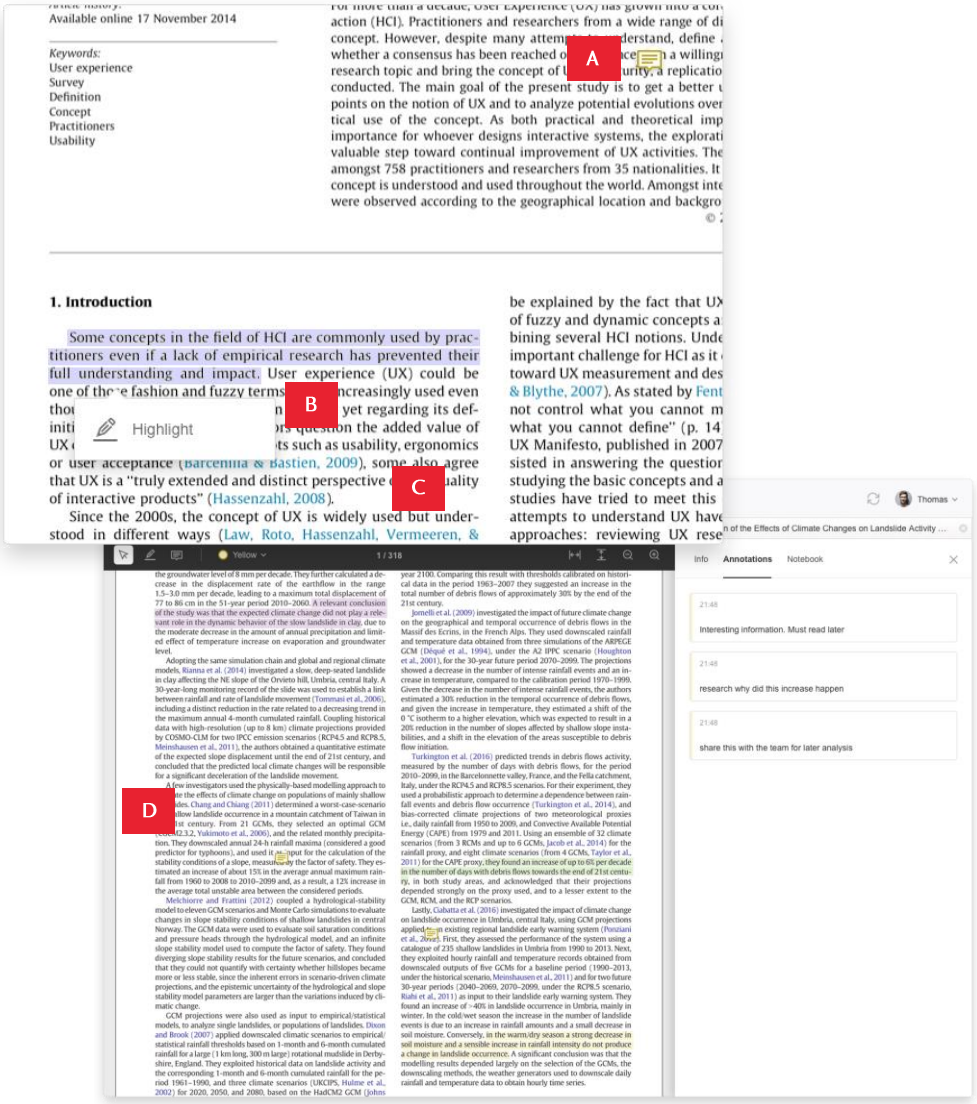
Keep your library organized and quickly find the references you need.

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.

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.

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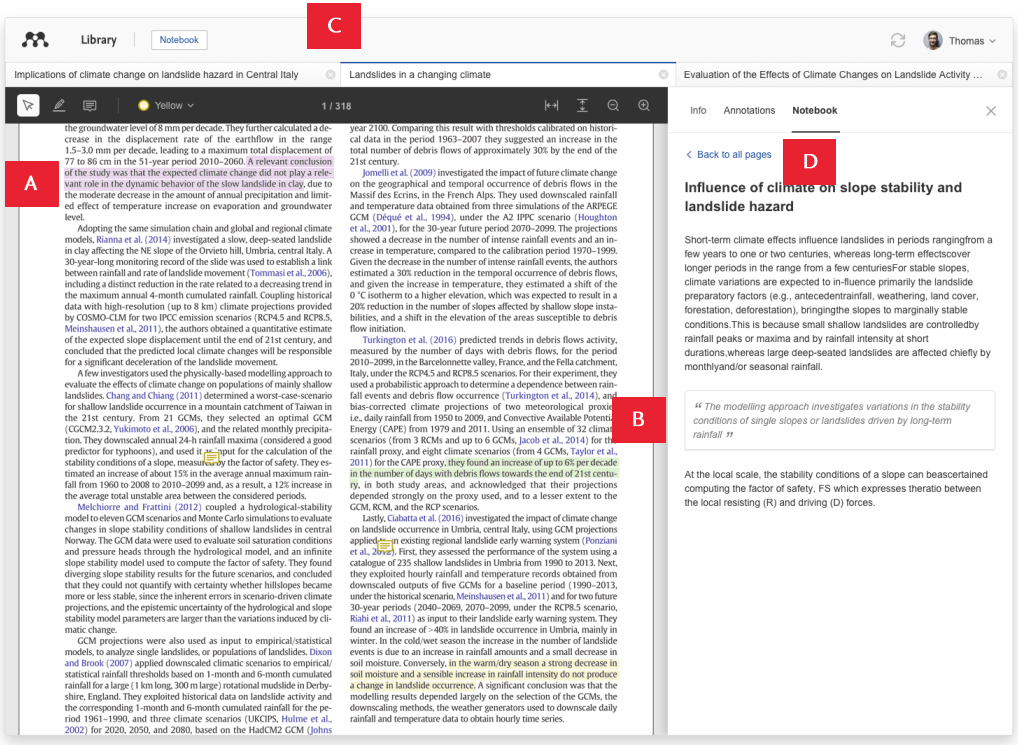
Keep your highlights in one place



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

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

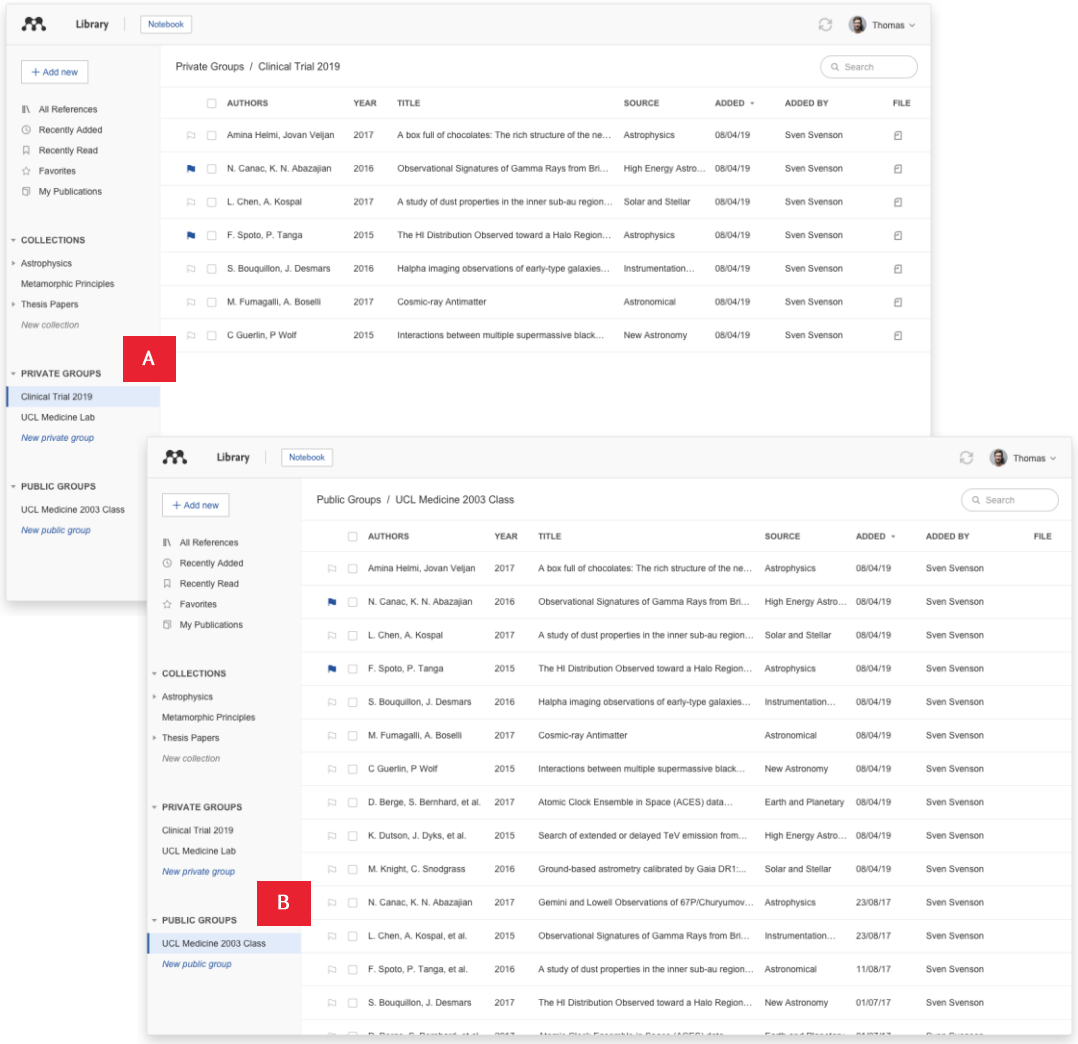
A. **Have all your highlights in one place**
Add any highlighted text from a PDF to your Notebook in just one click.

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 - the Notebook page you have open will stay open as you view different PDFs.

Share references with other researchers



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

Access your Public and Private Groups in Mendeley Reference Manager:

A. **Private Groups**
Share documents and references with small teams. You have to be invited to these groups and they allow you to share PDFs and collaborate using shared annotations.

B. **Public Groups**
There are two types of public groups in Mendeley Reference Manager: open public groups and invite-only public groups.

Open public groups can be joined by anyone with a Mendeley account, whereas you must be invited to join an invite-only group.

Both public group types can be used to share references with other members of the group. Neither allow the sharing of PDFs.

Next steps

Need more help?

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


Email


Chat


Mendeley Support Twitter


Facebook

Stay in touch

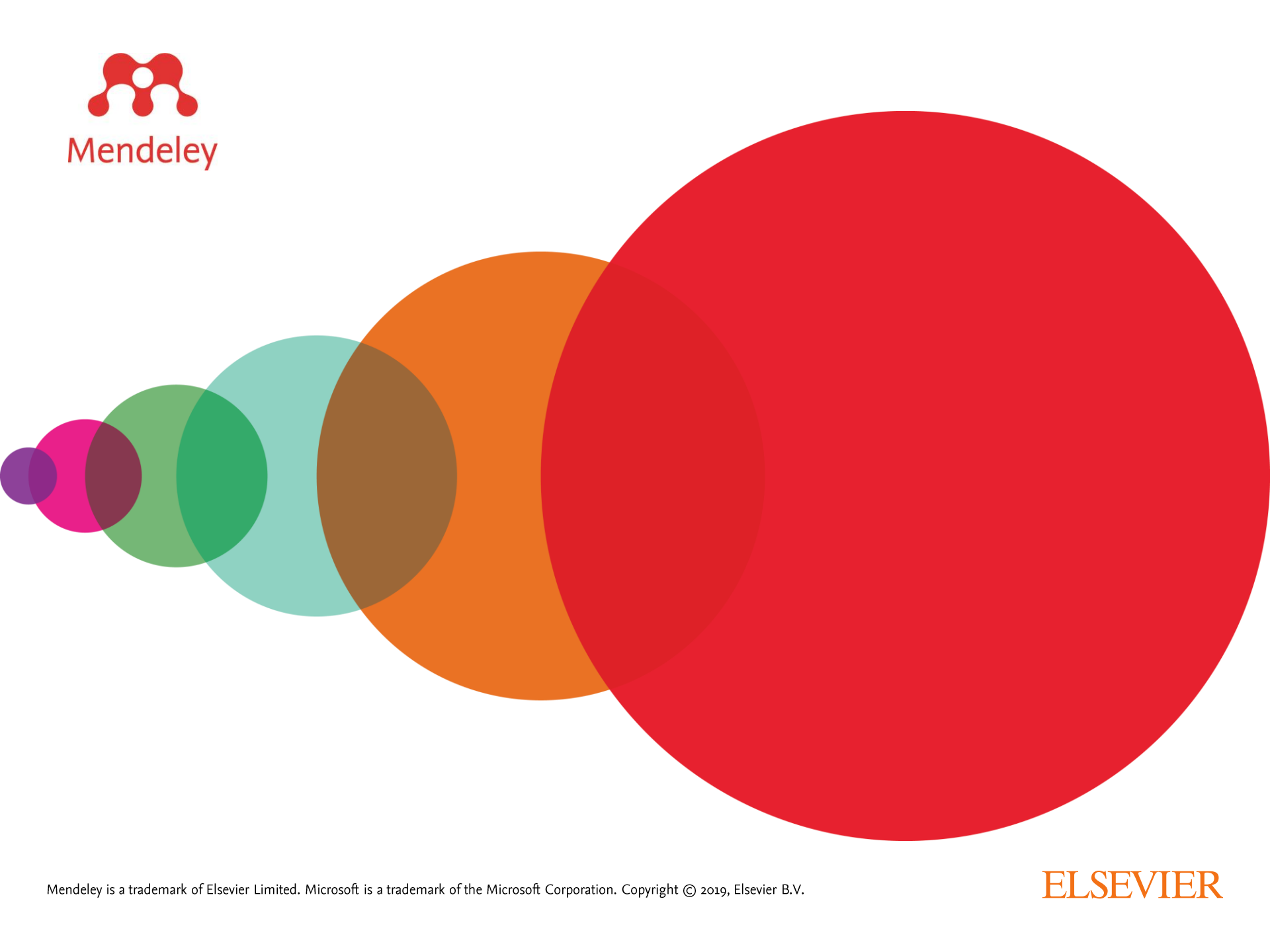
Hear about the latest news and updates from Mendeley by following us at any of these channels:


Team Mendeley Twitter


Facebook


LinkedIn


Mendeley Blog



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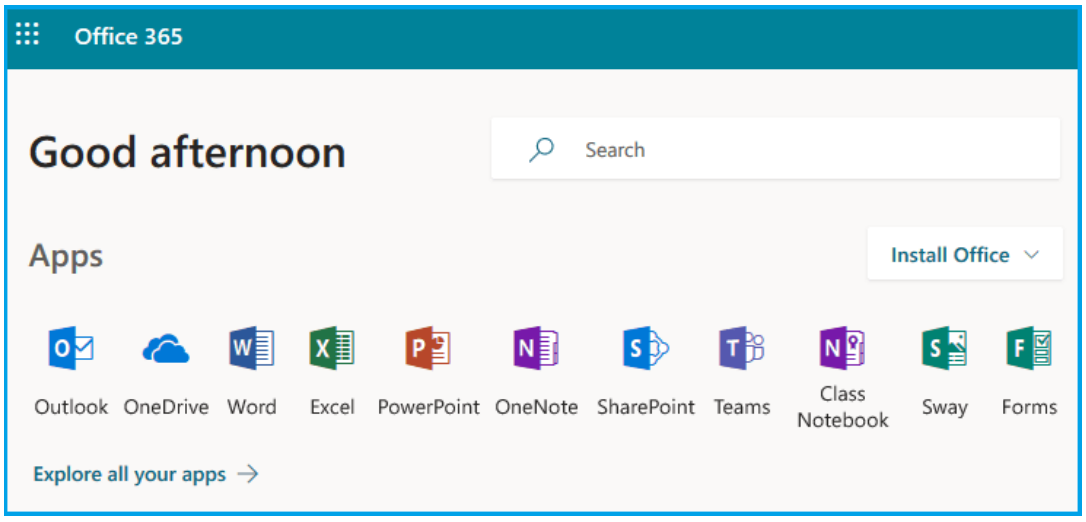
Installing Microsoft Office on Personal Devices

Office 365 permits you to install Microsoft Office on up to 5 personal devices.

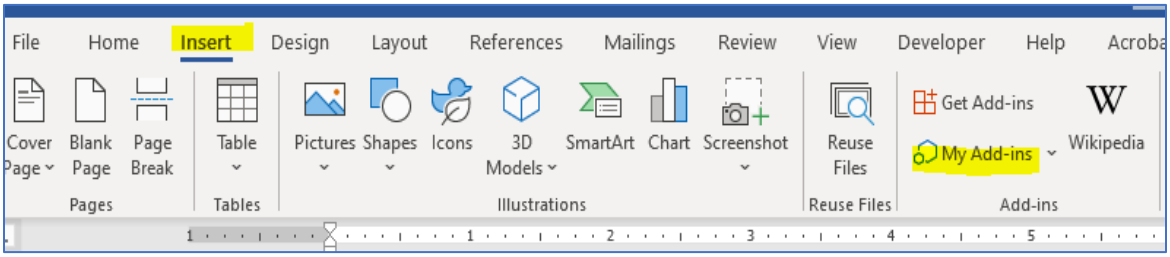
- Login to MAVzone.
- Select **Applications** in the Navigation Bar.
- From the applications list, launch **Office 365**.



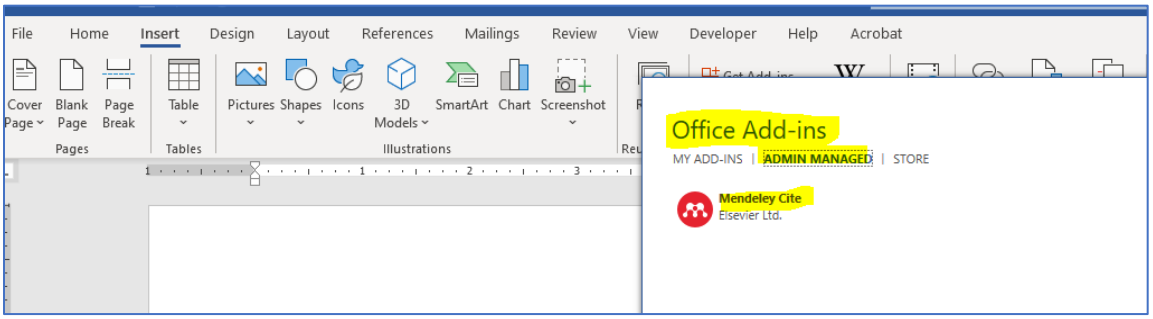
- Next, click on **Install Office** to access the respective installation page for your device and follow the prompts from there.

Installing the Mendeley Cite App in Word

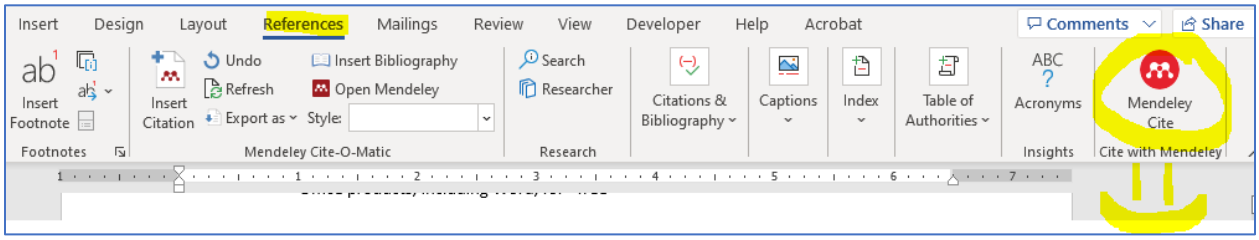
1. **Be sure you've installed Microsoft Word on your machine first!**
    a. This is especially important if you're using your own laptop/desktop.
    b. If you are a student at CMU you *can* download a desktop version of all Microsoft Office products, including Word, for *free*
    - CMU's IT team has authorized CMU Office users to download and install the Mendeley Cite App from the Microsoft Office Store.
2. **Open Microsoft Word** (the desktop application).
3. **Click the Insert tab** along the top ribbon.
4. **Click My Add-Ins** in the Insert tab.

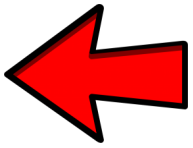


5. **Click the area that reads "Admin Managed"** in the pop up that appears.
6. **Click Mendeley Cite** from the Admin Managed Add-Ins menu.



You Did It! Mendeley Cite will now appear in your References tab!





If you see a yellow triangle with an exclamation point in the upper right corner of Word, you may need to sign-in with your CMU username & password!