



Mendeley

# Mendeley Reference Manager

A guide for new users

February 2021

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# 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](#)

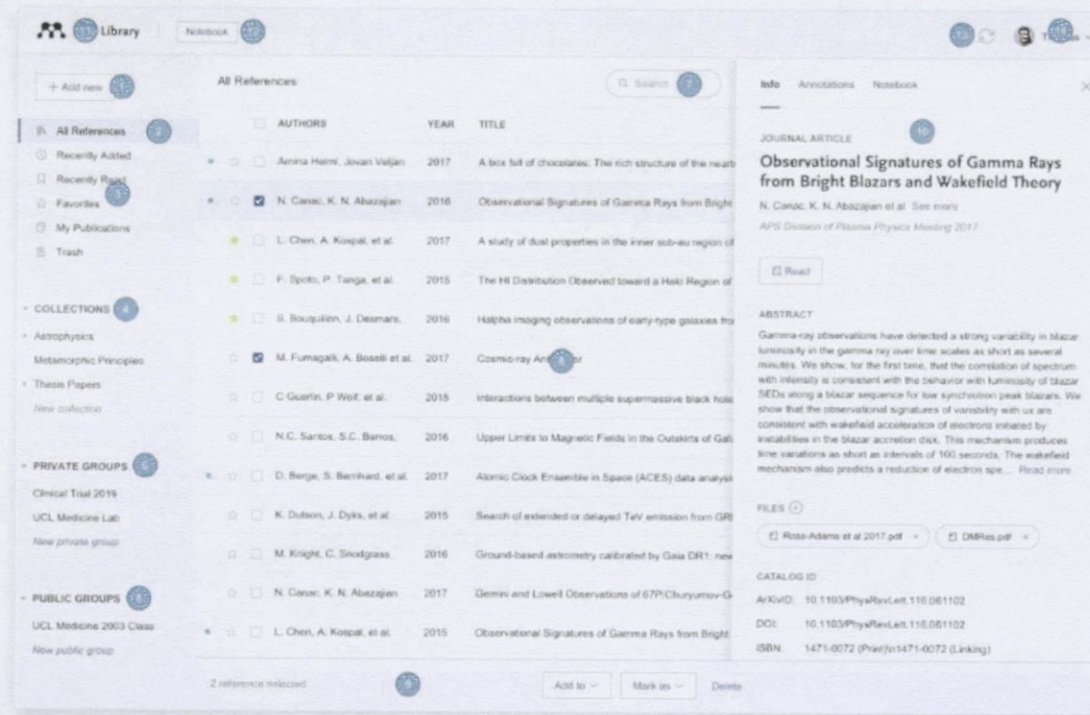
## Get started

- > Download Mendeley Reference Manager desktop at [mendeley.com/download-reference-manager](http://mendeley.com/download-reference-manager)
- > Access Mendeley Reference Manager web at [mendeley.com/reference-manager](http://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

**A**

AUTHORS	YEAR	TITLE	SOURCE
Aminia Helmi, Jovan Veljan	2017	A book	...
K. N. Abazojan	2016	Obse	...
A. Kaspai, et al.	2017	A stu	...
F. Spoto, P. Tanga, et al.	2015	The i	...
S. Bouquillon, J. Desmars	2016	Haip	...
M. Fumagalli, A. Boselli et al.	2017	Cosm	...

**B**

**C**

**D**

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:

- Drag and drop PDFs from your computer**  
Mendeley automatically captures author, title and publisher information.
- Import files from your computer**
  - Select and add locally stored references.
  - Import locally stored RIS, BibTeX or EndNote XML files.
- Manually create an entry**  
If you enter the DOI into the appropriate field Mendeley automatically looks up the details for you.
- 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](#)



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# Insert citations into your Microsoft® Word document

Add citations and bibliographies to a Microsoft Word document.

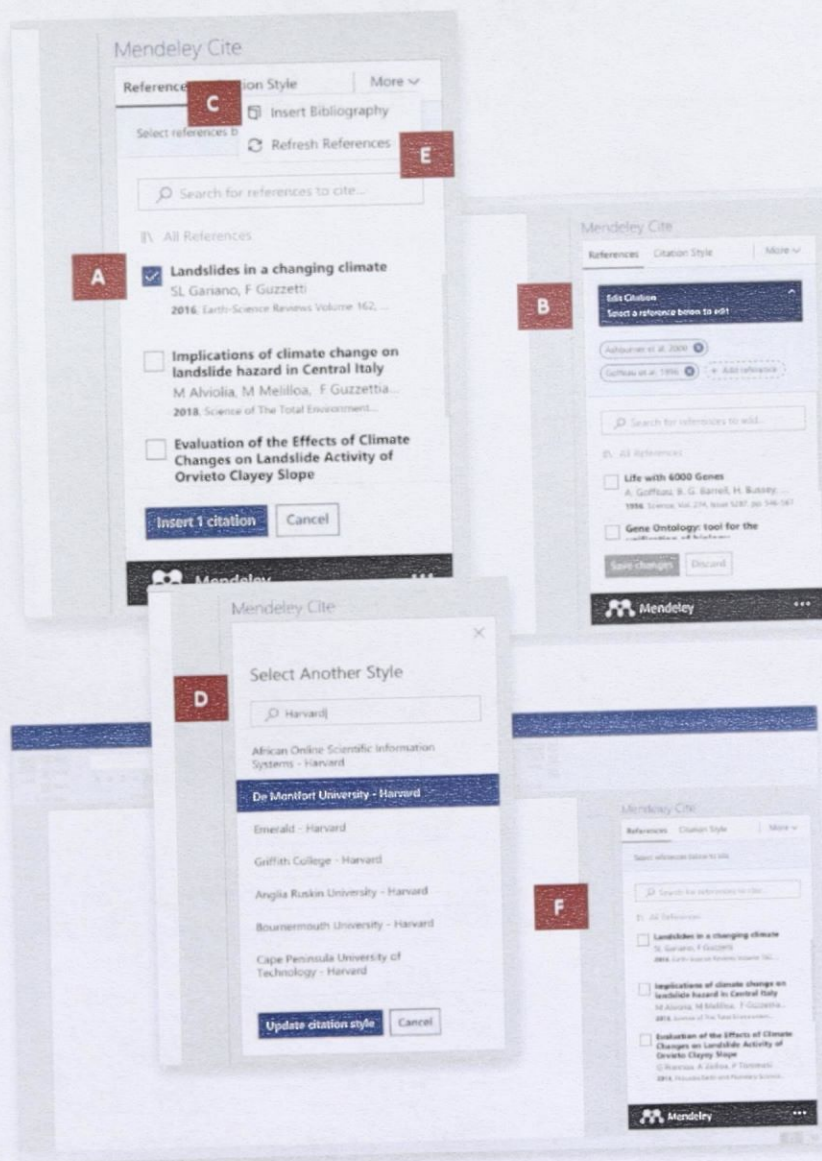
Use the Mendeley Cite add-in for Microsoft Word to generate citations and bibliographies in just a few clicks:

- 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](https://mendeley.com/cite/word/install)

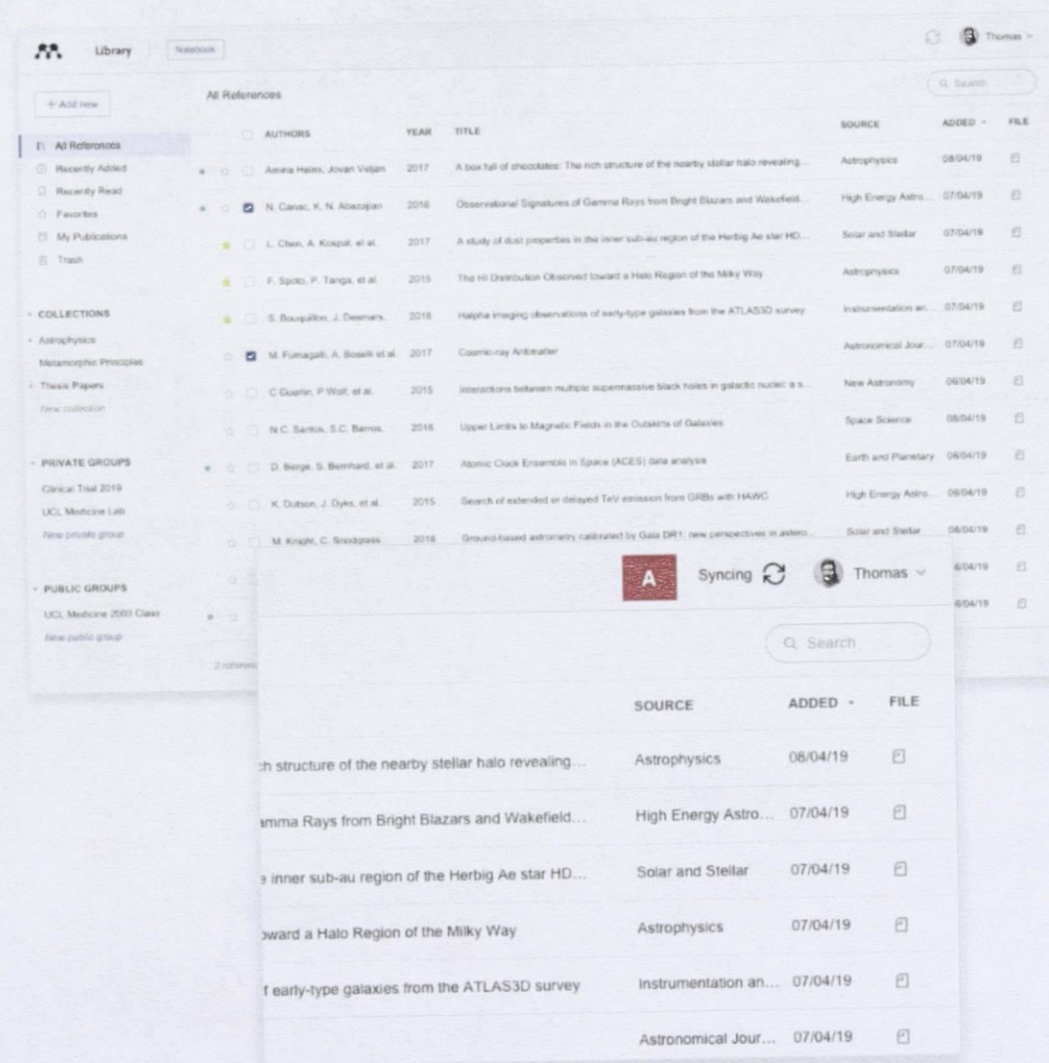
> Find out more about using Mendeley Cite in our [Help Guides](#)



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# 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.

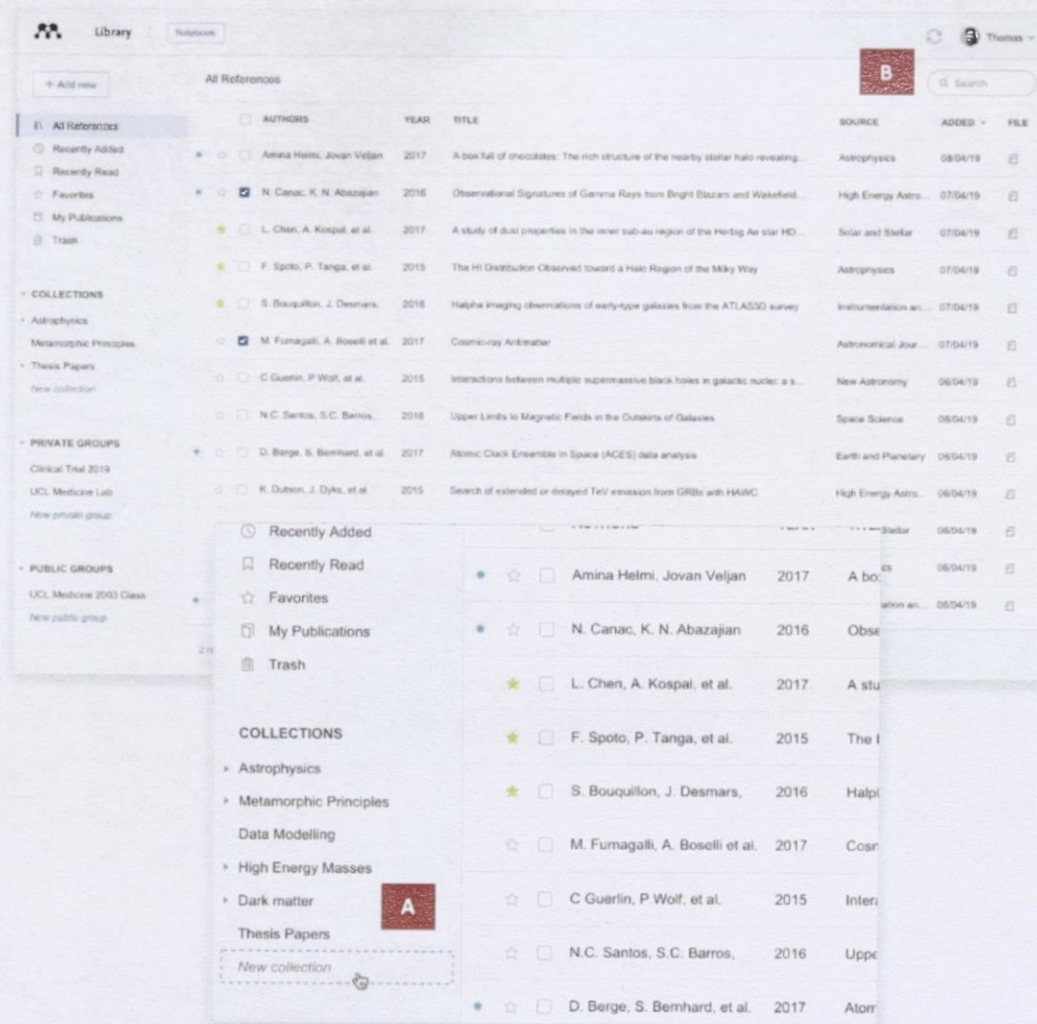
> Find out more about syncing in our [Help Guides](#)



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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

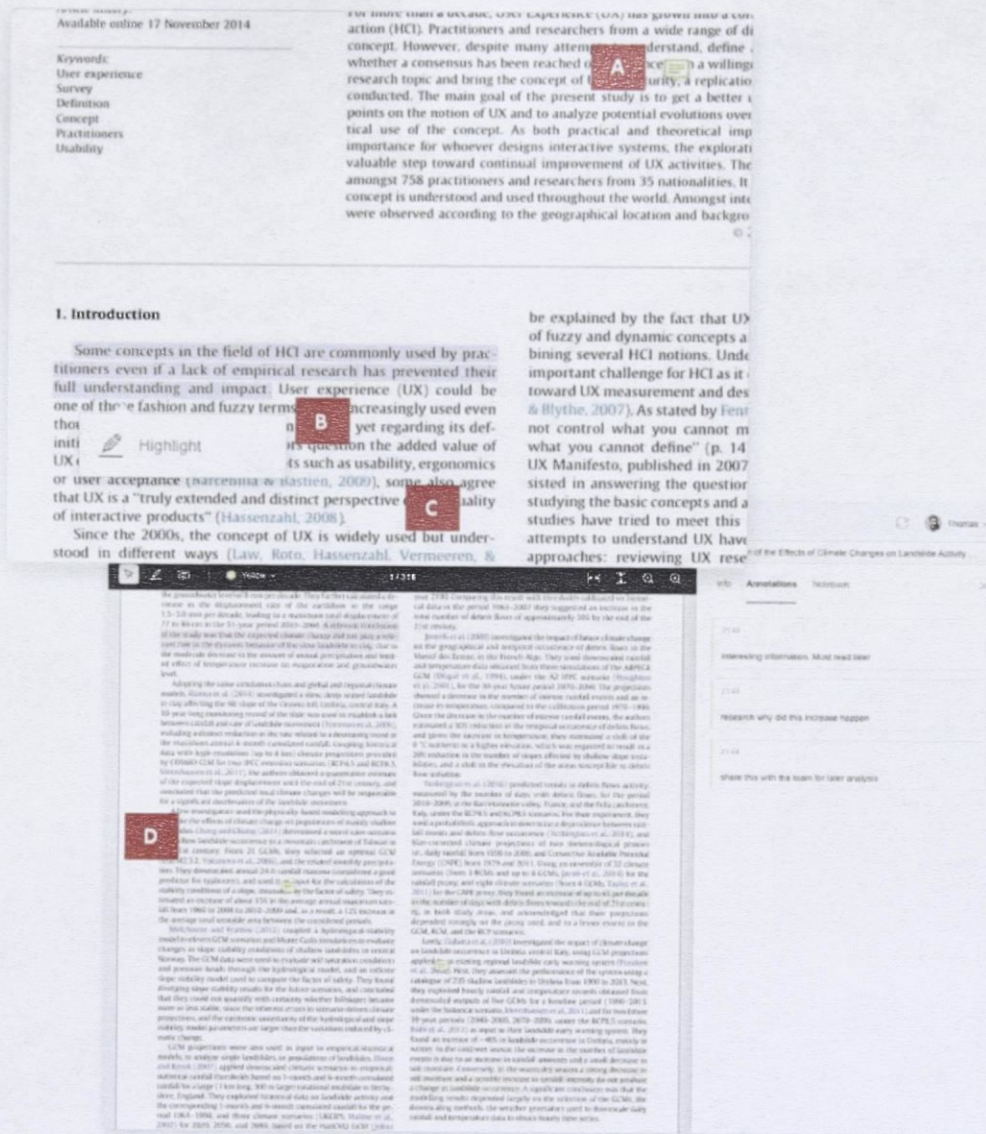
Enter a search term into the search field and Mendeley will return the appropriate results. Mendeley searches by author, title, year and source.

> 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.

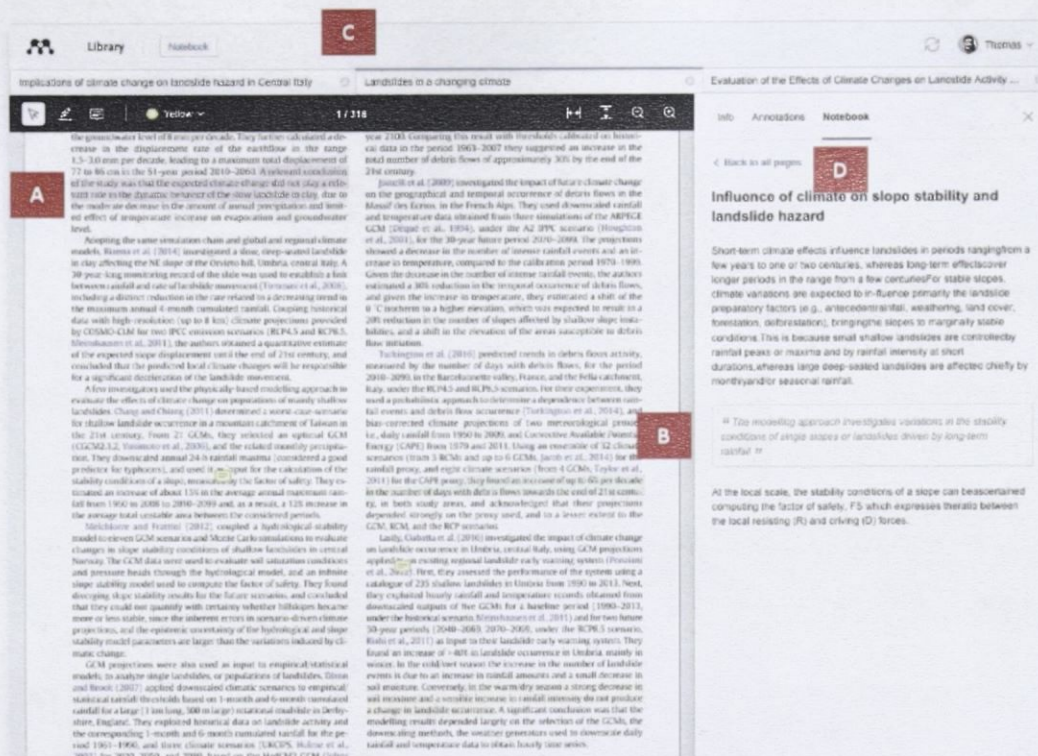
> Find out more about annotating your PDFs in our [Help Guides](#)



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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:

- Have all your highlights in one place**  
Add any highlighted text from a PDF to your Notebook in just one click.
- Refer back to the original PDF**  
Navigate back to the source of any highlight by selecting it in your Notebook.
- Work across papers**  
Keep the same Notebook page in view while switching between PDFs.
- Create multiple Notebook pages**  
Make as many Notebook pages as you need

> Find out more about your Mendeley Notebook in our [Help Guides](#)



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# 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.

The screenshot displays the Mendeley Reference Manager web interface. At the top, there's a navigation bar with 'Library' and 'Notebook' tabs, and a user profile 'Thomas'. Below this, a sidebar on the left contains navigation options: '+ Add new', 'All References', 'Recently Added', 'Recently Read', 'Favorites', 'My Publications', 'Trash', 'COLLECTIONS' (with sub-items like 'Astrophysics', 'Metamorphic Principles', 'Thesis Papers'), and 'PRIVATE GROUPS' (with sub-items like 'Clinical Trial 2019', 'UCL Medicine Lab'). A red arrow points to the 'PRIVATE GROUPS' section. The main content area shows the 'Private Groups / Clinical Trial 2019' view. It features a search bar and a table of references. The table has columns for 'AUTHORS', 'YEAR', 'TITLE', 'SOURCE', 'ADDED', 'ADDED BY', and 'FILE'. The references listed are:

AUTHORS	YEAR	TITLE	SOURCE	ADDED	ADDED BY	FILE
Amina Helmi, Jovan Veljan	2017	A box full of chocolates: The rich structure of the ne...	Astrophysics	08/04/19	Sven Svenson	[icon]
N. Canac, K. N. Abazajian	2016	Observational Signatures of Gamma Rays from Bri...	High Energy Astro...	08/04/19	Sven Svenson	[icon]
L. Chen, A. Kospal	2017	A study of dust properties in the inner sub-au region...	Solar and Stellar	08/04/19	Sven Svenson	[icon]
F. Spoto, P. Tanga	2015	The HI Distribution Observed toward a Halo Region...	Astrophysics	08/04/19	Sven Svenson	[icon]
S. Bouquillon, J. Desmars	2016	Halpα imaging observations of early-type galaxies...	Instrumentation...	08/04/19	Sven Svenson	[icon]
M. Fumagalli, A. Boselli	2017	Cosmic-ray Antimatter	Astronomical	08/04/19	Sven Svenson	[icon]
C Guerlin, P Wolf	2015	Interactions between multiple supermassive black...	New Astronomy	08/04/19	Sven Svenson	[icon]

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





# Next steps

- > Download Mendeley Reference Manager desktop at [mendeley.com/download-reference-manager](https://mendeley.com/download-reference-manager)
- > Access Mendeley Reference Manager web at [mendeley.com/reference-manager](https://mendeley.com/reference-manager)

## Need more help?

Visit the Mendeley Support Hub at [service.elsevier.com/app/home/supporthub/mendeley](https://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](https://mendeley.com/release-notes-reference-manager).



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# 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.

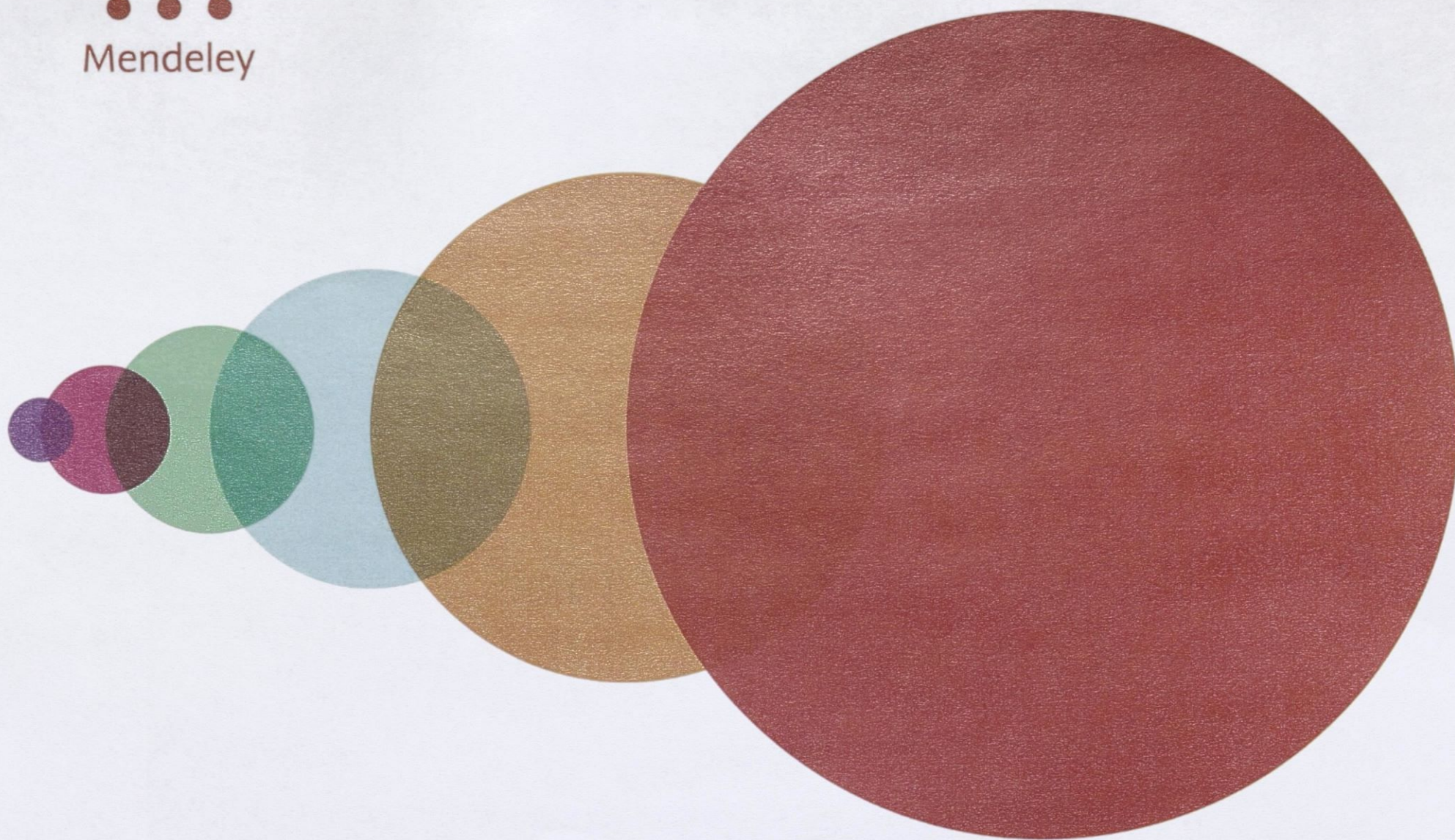
> Want to learn more about Mendeley Advisors? Read our [Advisor of the Month](#) column or apply on our [Mendeley Advisor webpage](#).

[www.mendeley.com/advisor-community](http://www.mendeley.com/advisor-community)



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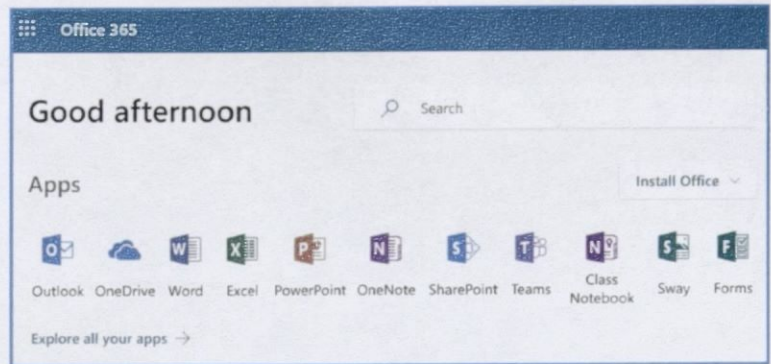
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## Installing Microsoft Office on Personal Devices

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**.

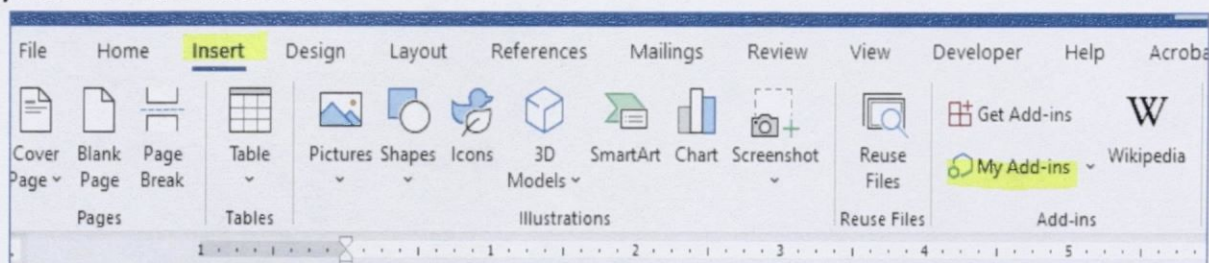


- Next, click on **Install Office** to access the respective installation page for your device and follow the prompts from there.

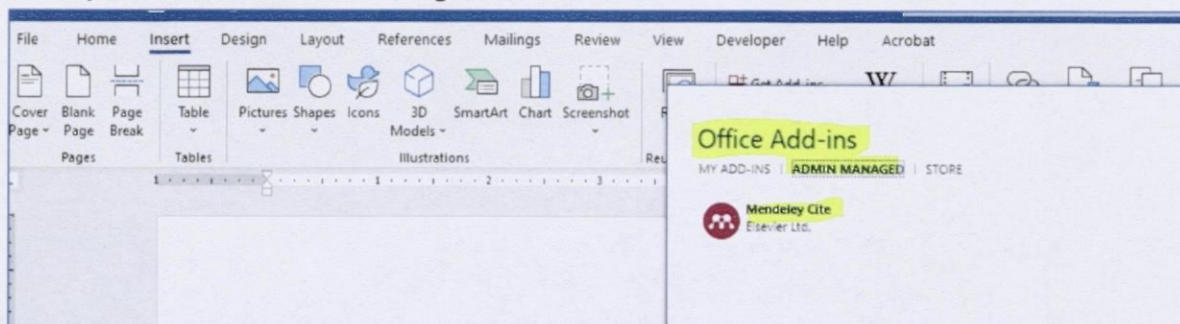


# Installing the Mendeley Cite App in Word

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!**

