



Mendeley

Mendeley Reference Manager

A guide for new users

October 2019

ELSEVIER

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:

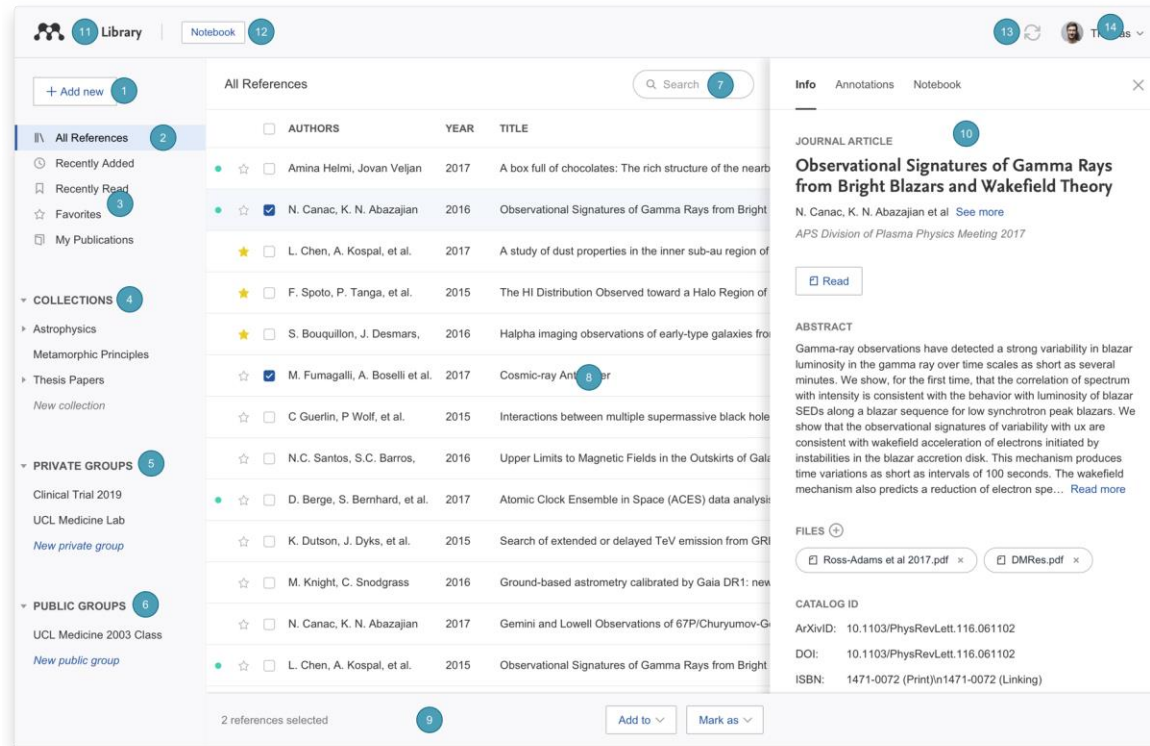
1. [Navigate Mendeley Reference Manager](#)
2. [Build your Mendeley library](#)
3. [Insert citations into your Microsoft® Word document](#)
4. [Access your Mendeley library anywhere](#)
5. [Organize and find references in your Mendeley library](#)
6. [Highlight and annotate PDFs](#)
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8. [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



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

Build your Mendeley library

The collage illustrates four methods for building a Mendeley library:

- A. Drag and drop PDFs from your computer**: Shows the 'Add new' menu in the Mendeley Desktop application.
- B. Import files from your computer**: Shows the 'Import library' dialog box, which allows importing references from local files in BibTeX, Endnote XML, or RIS formats.
- C. Manually create an entry**: Shows the 'Add entry manually' form, where users can enter reference details like DOI, title, and authors.
- D. Import content from the Internet using Mendeley Web Importer**: Shows the 'Web Importer' dialog box, which detects references on a webpage and offers to add them to the 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:

- 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**
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

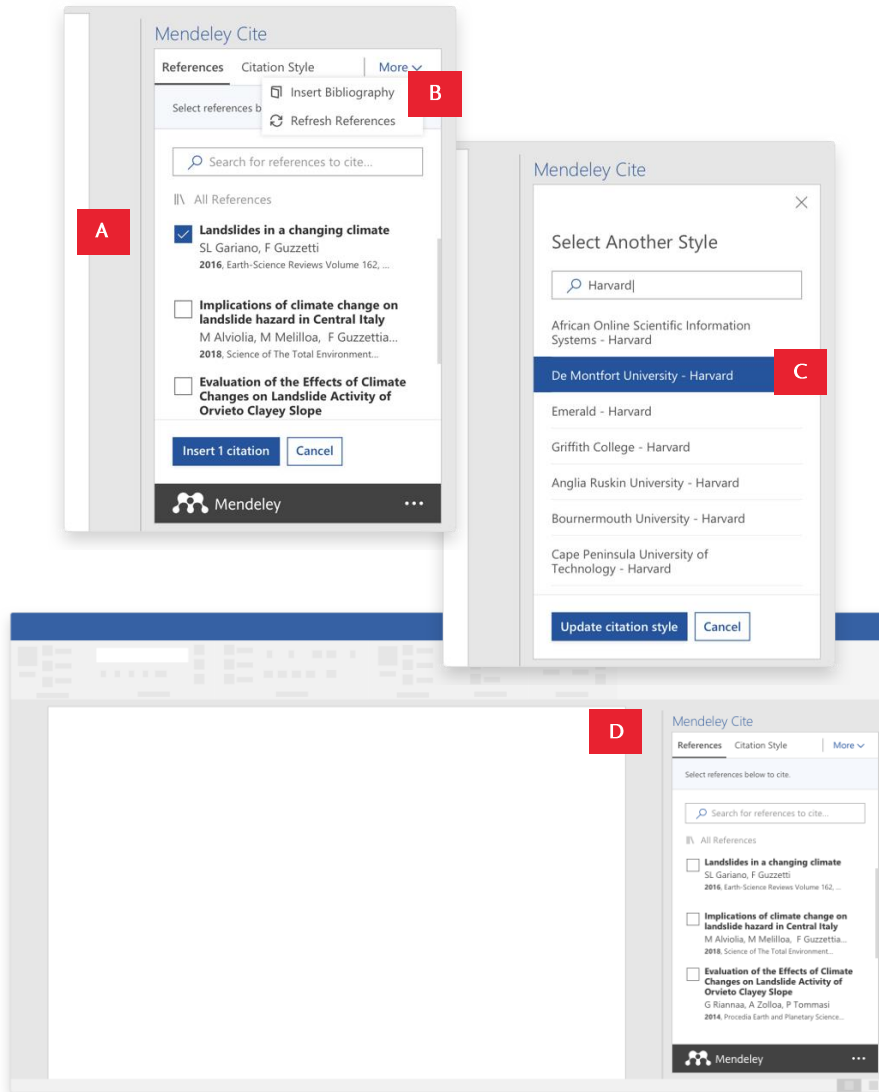
Add citations and bibliographies to a Microsoft Word document you're writing.

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

The screenshot displays the Mendeley web interface. On the left is a sidebar with navigation options: '+ Add new', 'All References', 'Recently Added', 'Recently Read', 'Favorites', 'My Publications', 'COLLECTIONS' (Astrophysics, Metamorphic Principles, Thesis Papers, New collection), 'PRIVATE GROUPS' (Clinical Trial 2019, UCL Medicine Lab, New private group), and 'PUBLIC GROUPS' (UCL Medicine 2003 Class, New public group). The main area is titled 'All References' and contains a table of references. A search bar is located at the top right of the table. An overlay window is shown in the foreground, featuring a red 'A' icon, a 'Syncing' status with a circular arrow icon, and a user profile for 'Thomas'. Below this, it shows a smaller version of the reference table with columns for 'SOURCE', 'ADDED', and 'FILE'.

AUTHORS	YEAR	TITLE	SOURCE	ADDED	FILE
<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> Amina Helmi, Jovan Veljan	2017	A box full of chocolates: The rich structure of the nearby stellar halo revealing...	Astrophysics	08/04/19	
<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> N. Canac, K. N. Abazajian	2016	Observational Signatures of Gamma Rays from Bright Blazars and Wakefield...	High Energy Astro...	07/04/19	
<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> L. Chen, A. Kospal, et al.	2017	A study of dust properties in the inner sub-au region of the Herbig Ae star HD...	Solar and Stellar	07/04/19	
<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> F. Spoto, P. Tanga, et al.	2015	The HI Distribution Observed toward a Halo Region of the Milky Way	Astrophysics	07/04/19	
<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> S. Bouquillon, J. Desmars,	2016	Ha/alpha imaging observations of early-type galaxies from the ATLAS3D survey	Instrumentation an...	07/04/19	
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> M. Fumagalli, A. Boselli et al.	2017	Cosmic-ray Antimatter	Astronomical Jour...	07/04/19	
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> C. Guerlin, P. Wolf, et al.	2015	Interactions between multiple supermassive black holes in galactic nuclei: a s...	New Astronomy	06/04/19	
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> N.C. Santos, S.C. Barros,	2016	Upper Limits to Magnetic Fields in the Outskirts of Galaxies	Space Science	06/04/19	
<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> D. Berge, S. Bernhard, et al.	2017	Atomic Clock Ensemble in Space (ACES) data analysis	Earth and Planetary	06/04/19	
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> K. Dutson, J. Dyks, et al.	2015	Search of extended or delayed TeV emission from GRBs with HAWC	High Energy Astro...	06/04/19	
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> M. Knight, C. Snodgrass	2016	Ground-based astrometry calibrated by Gaia DR1: new perspectives in astero...	Solar and Stellar	06/04/19	

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.

Organize and find references in your Mendeley library

The screenshot shows the Mendeley Library interface. On the left is a sidebar with sections: 'All References' (with sub-items: Recently Added, Recently Read, Favorites, My Publications), 'COLLECTIONS' (with sub-items: Astrophysics, Metamorphic Principles, Thesis Papers, and a 'New collection' link), 'PRIVATE GROUPS' (with sub-items: Clinical Trial 2019, UCL Medicine Lab, and a 'New private group' link), and 'PUBLIC GROUPS' (with sub-items: UCL Medicine 2003 Class and a 'New public group' link). The main area displays a table of 'All References' with columns: AUTHORS, YEAR, TITLE, SOURCE, ADDED, and FILE. The table lists several references, including 'A box full of chocolates: The rich structure of the nearby stellar halo revealing...', 'Observational Signatures of Gamma Rays from Bright Blazars and Wakefield...', 'A study of dust properties in the inner sub-au region of the Herbig Ae star HD...', 'The HI Distribution Observed toward a Halo Region of the Milky Way', 'Halp imaging observations of early-type galaxies from the ATLAS3D survey', 'Cosmic-ray Antimatter', 'Interactions between multiple supermassive black holes in galactic nuclei: a s...', 'Upper Limits to Magnetic Fields in the Outskirts of Galaxies', 'Atomic Clock Ensemble in Space (ACES) data analysis', 'Search of extended or delayed TeV emission from GRBs with HAWC', and 'Ground-based astrometry calibrated by Gaia DR1: new perspectives in astero...'. A red box labeled 'A' is positioned over the 'New collection' link in the sidebar. A red box labeled 'B' is positioned over the search bar at the top right of the 'All References' list.

AUTHORS	YEAR	TITLE	SOURCE	ADDED	FILE
Amina Helmi, Jovan Veljan	2017	A box full of chocolates: The rich structure of the nearby stellar halo revealing...	Astrophysics	08/04/19	
N. Canac, K. N. Abazajian	2016	Observational Signatures of Gamma Rays from Bright Blazars and Wakefield...	High Energy Astro...	07/04/19	
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K. Dutson, J. Dyks, et al.	2015	Search of extended or delayed TeV emission from GRBs with HAWC	High Energy Astro...	06/04/19	
M. Knight, C. Snodgrass	2016	Ground-based astrometry calibrated by Gaia DR1: new perspectives in astero...	Solar and Stellar	06/04/19	

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:

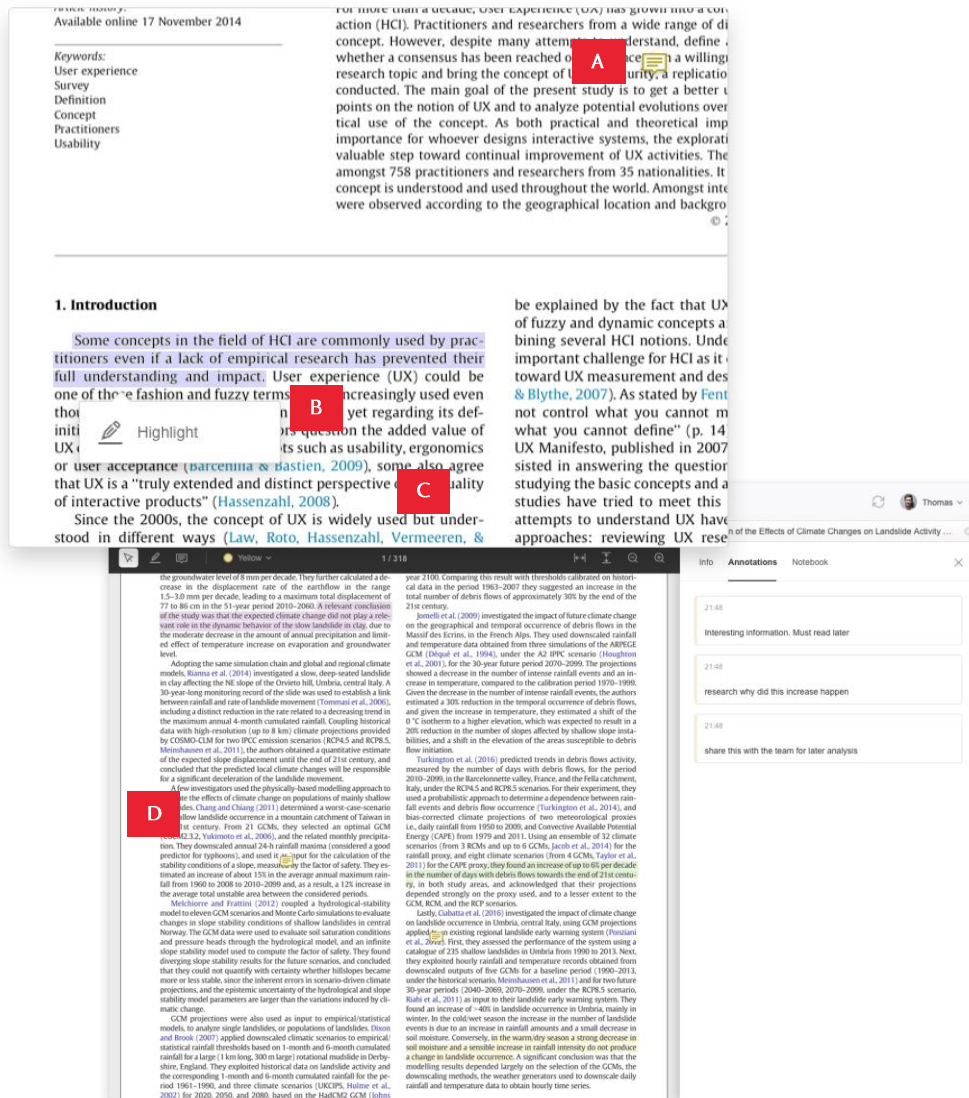
A. Organize your references

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.

Keep your highlights in one place

The screenshot displays the Mendeley Notebook application interface. On the left, a sidebar shows a 'Library' tab and a 'Notebook' tab. The main area is divided into two panes. The left pane shows a PDF titled 'Implications of climate change on landslide hazard in Central Italy' with a yellow highlight. The right pane shows a PDF titled 'Evaluation of the Effects of Climate Changes on Landslide Activity ...' with a red highlight. The interface includes a search bar, a list of documents, and a 'Notebook' tab for managing highlights. The highlighted text in the left pane discusses the groundwater level of 8 mm per decade and the displacement rate of the earthflow. The highlighted text in the right pane discusses the impact of future climate change on the geographical and temporal occurrence of debris flows.

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

A

Private Groups / Clinical Trial 2019

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	
N. Canac, K. N. Abazajian	2016	Observational Signatures of Gamma Rays from Bri...	High Energy Astro...	08/04/19	Sven Svenson	
L. Chen, A. Kospal	2017	A study of dust properties in the inner sub-au region...	Solar and Stellar	08/04/19	Sven Svenson	
F. Spoto, P. Tanga	2015	The HI Distribution Observed toward a Halo Region...	Astrophysics	08/04/19	Sven Svenson	
S. Bouquillon, J. Desmars	2016	Halpna imaging observations of early-type galaxies...	Instrumentation...	08/04/19	Sven Svenson	
M. Fumagalli, A. Boselli	2017	Cosmic-ray Antimatter	Astronomical	08/04/19	Sven Svenson	
C Guerin, P Wolf	2015	Interactions between multiple supermassive black...	New Astronomy	08/04/19	Sven Svenson	

B

Public Groups / UCL Medicine 2003 Class

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	
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F. Spoto, P. Tanga	2015	The HI Distribution Observed toward a Halo Region...	Astrophysics	08/04/19	Sven Svenson	
S. Bouquillon, J. Desmars	2016	Halpna imaging observations of early-type galaxies...	Instrumentation...	08/04/19	Sven Svenson	
M. Fumagalli, A. Boselli	2017	Cosmic-ray Antimatter	Astronomical	08/04/19	Sven Svenson	
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K. Dutton, J. Dyks, et al.	2015	Search of extended or delayed TeV emission from...	High Energy Astro...	08/04/19	Sven Svenson	
M. Knight, C. Snodgrass	2016	Ground-based astrometry calibrated by Gaia DR1...	Solar and Stellar	08/04/19	Sven Svenson	
N. Canac, K. N. Abazajian	2017	Gemini and Lowell Observations of 67P/Churyumov...	Astrophysics	23/08/17	Sven Svenson	
L. Chen, A. Kospal, et al.	2015	Observational Signatures of Gamma Rays from Bri...	Instrumentation...	23/08/17	Sven Svenson	
F. Spoto, P. Tanga, et al.	2016	A study of dust properties in the inner sub-au region...	Astronomical	11/08/17	Sven Svenson	
S. Bouquillon, J. Desmars	2017	The HI Distribution Observed toward a Halo Region...	New Astronomy	01/07/17	Sven Svenson	

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:



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[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](#)



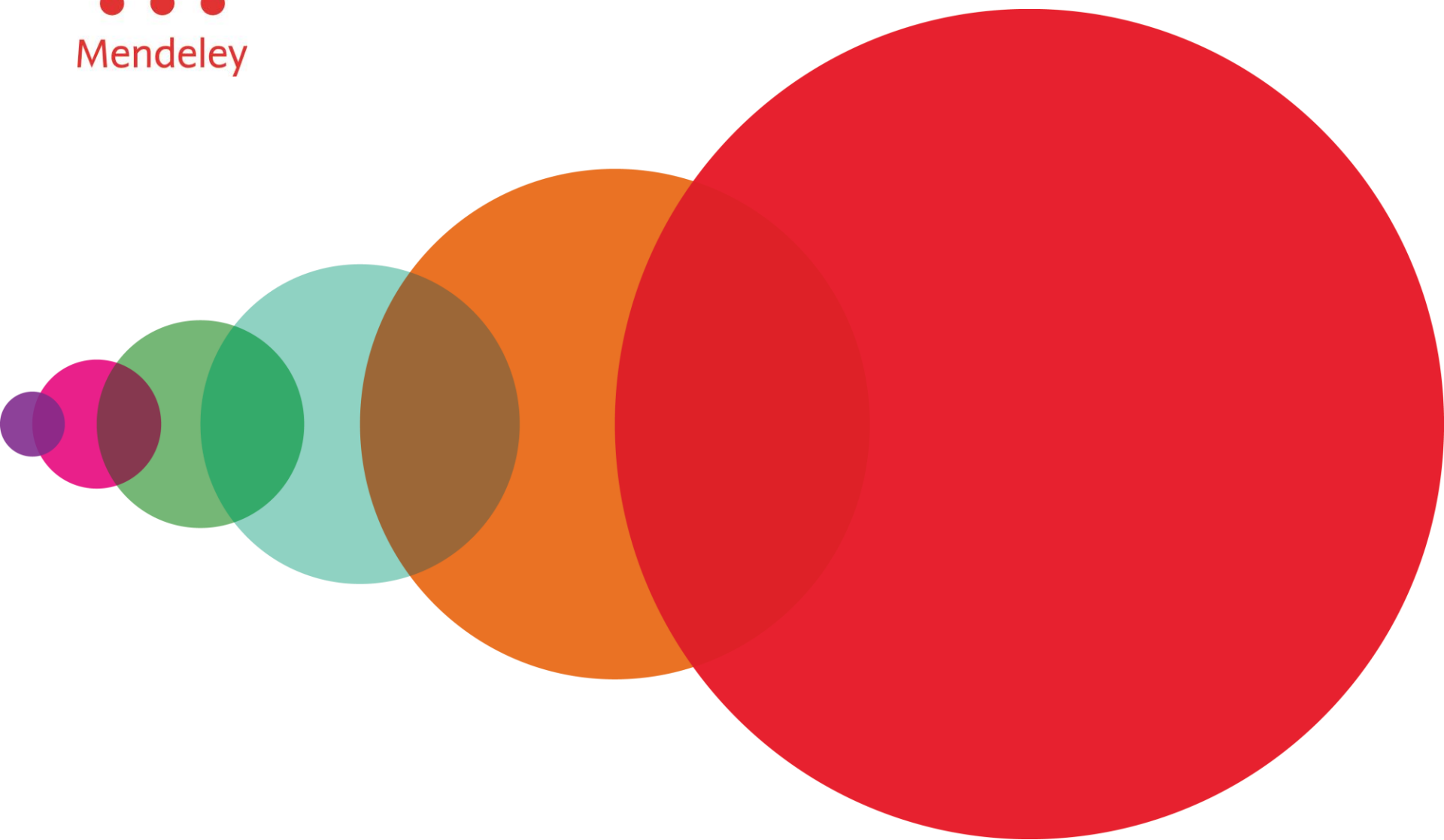
[Facebook](#)



[LinkedIn](#)



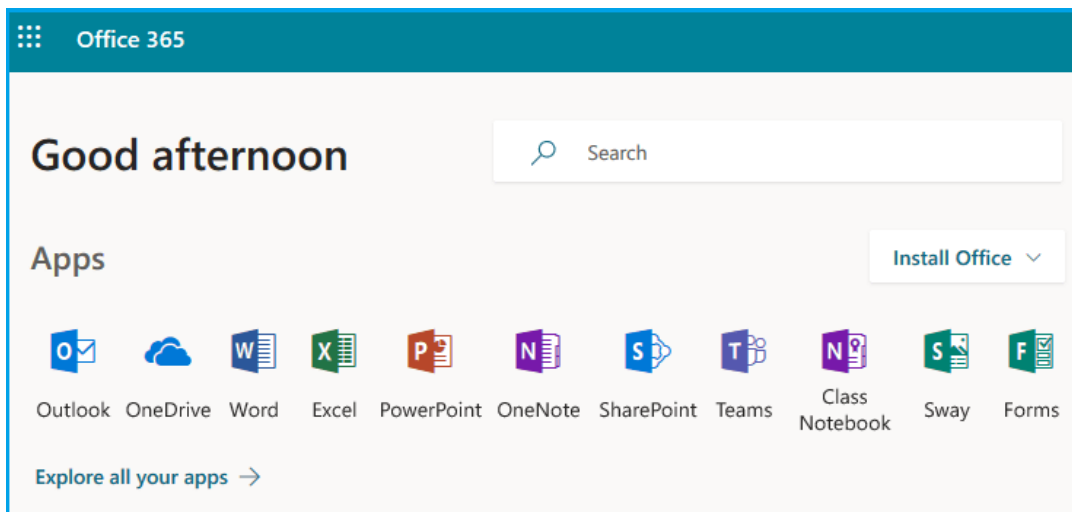
[Mendeley Blog](#)



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**.

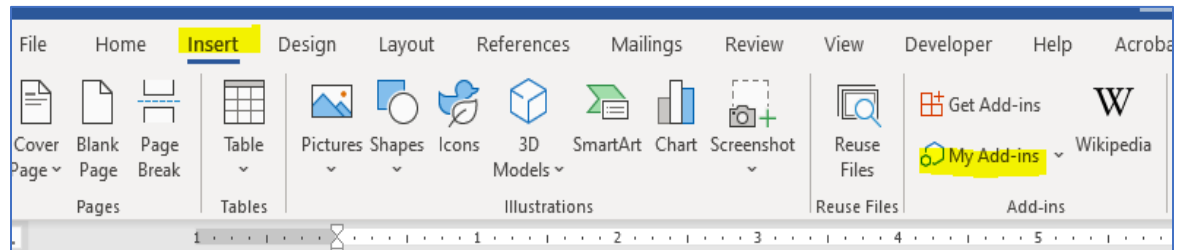


- Next, click on **Install Office** to access the respective installation page for your device and follow the prompts from there.

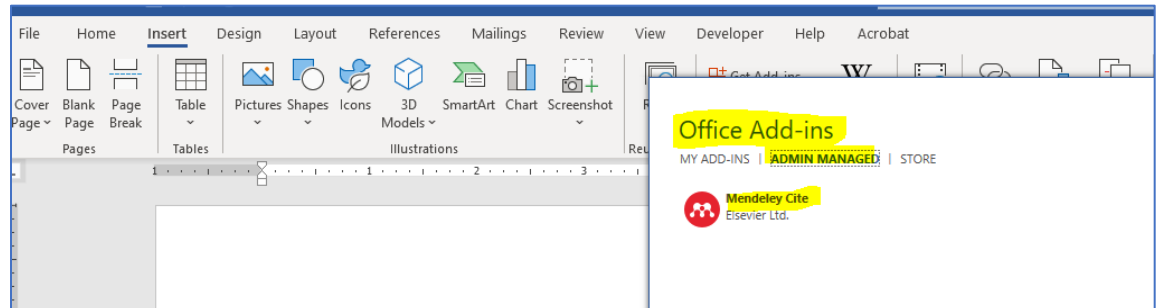
Installing the Mendeley Cite App in Word

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**

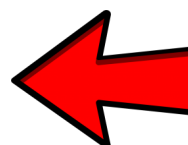
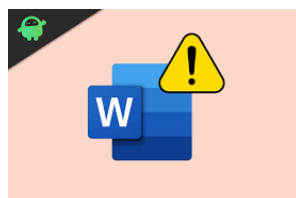
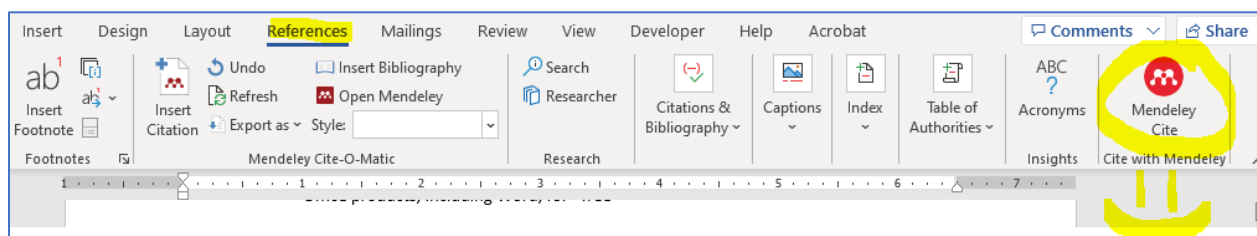
➤ CMU's IT team has authorized CMU Office users to download and install the Mendeley Cite App from the Microsoft Office Store.
2. **Open Microsoft Word** (the desktop application).
3. **Click the Insert tab** along the top ribbon.
4. **Click My Add-Ins** in the Insert tab.



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!