**Introduction to Mendeley
Fall 2019**

**Please log into the lab computer before the workshop starts. Open either Chrome or Front Motion Firefox.**

Your contact for Mendeley: Erin O’Toole, Subject Librarian for the College of Science, erin.otoole@unt.edu

Mendeley is a free reference manager sponsored by Elsevier and is not affiliated with UNT. You have the option of purchasing an upgrade at Settings & Privacy in your account. More Mendeley information is available on Reference Managers Guide at <http://guides.library.unt.edu/referencemanagers>. See links to instructional videos!

Mendeley has 4 components: Mendeley Web, Web Importer, Mendeley Desktop (for Windows/ Mac/Linux), and Mendeley citation plugin for Word/LibreOffice/BibTeX. We will cover the first 2 today and watch a video about the other 2.

Activity 1. Create your account for Mendeley Web (2 GB of personal storage)

* Start at www.mendeley.com
* Select the button, “Create a free account”
* Enter any email address and password; select your field of study and academic status and Create Account.
* The opening page is the Feed, which is part of the research network in Mendeley. In the future you will get suggestions of publications for you to read based on your publications and the publications you collect, and news from groups you join. When you read a publication, it shows up in the Reader counts displayed by Mendeley and displayed by almetrics companies like Altmetric and Plum Analytics.

Activity 2. Create some folders for references and articles

* Move to the Library section – see top toolbar
* Find Folders in the left panel, then select Create Folder and name it
* Make at least 2 folders
* Note the More icon to the right of the folder, where you can create subfolders, rename or remove a folder

Activity 3. Add documents and references from ProQuest Research Library

* Navigate to a file in a database and download it as an RIS file.
* Drag the file from wherever your browser stores the downloads to the Library screen
* **Or** upload the file using the Add/Import Document button at the top left of screen
* Mendeley will read the metadata on the pdf and create a reference with the file attached in the Recently Added folder.
* Click on the bar containing the reference to reveal the Edit panel on the right
* Click on the Edit button at top right to open the panel and edit any information that is incorrect or missing. Be sure to Save your changes!

Activity 4. Move references to your folder

* Find the new references in the Recently Added View and select the ones you want to move to a folder
* Select Add To from the top gray toolbar and select the target folder
* Now you should be able to see the references in the folder, Recently Added, and All Documents. *If you delete a reference from any of these places, it will be deleted from all*. You can retrieve deleted references from the Trash/My Library folder

Activity 5. Backup way to import references and documents – try Academic Search Complete

* Use Export and then Direct Export in RIS Format to download the file.
* Return to your Library and click on Add, the blue button on top left; select Import RIS. **Or** drag file into middle of Library screen to add references.
* Go to the Recently Added folder and click on a reference title. Notice the Drag File Here icon in the editing panel.
* Download the matching pdf and drag it or upload it in editing panel.

Activity 6. Annotate the pdf

* Click on the bar for a reference with an attached pdf; look for the pdf link in the Edit panel
* The pdf will open in a screen similar to Adobe Acrobat
* Try highlighting text and creating sticky notes. When you close the tab, the annotations will be saved. (This seems to work better in Mendeley Desktop)

Activity 7. Install Web Importer and import references and/or pdfs

* Go your account dropdown (top right); select Download Mendeley and then select the button Find Out More under the Web Importer.
* Web Importer appears to be only available for Chrome right now. Select Get Web Importer for Chrome and then use the Add to Chrome button.
* After installation, the Mendeley icon should appear at the top right of your browser
* Use a database to identify an article you want; download the article to a viewer
* Click on the icon to reveal the panel, then click on the blue Save button. The panel will tell you whether the reference and pdf were added to your library.

\*\* Time for a video about Mendeley Desktop and Cite-O-Matic!

Activity 8. Download Mendeley Desktop (if you have your computer here) – you need this component in order to make bibliographies and insert citations while you write in Microsoft Word

* In Mendeley Web, use the dropdown by your name (top right) to select Download Mendeley Desktop; download the version appropriate for your computer
* Many of the functions are the same but you can do additional activities in Desktop

Activity 8. Sync, Create Folder and moving documents

* Always Sync Mendeley Web and Desktop before you start working
* Create Folder in the left panel; move references and documents by selecting, dropping and dragging
* You can move multiple references by using Shift or Control and clicking on multiple rows.

Activity 9. Import references from a database

* Export references as RIS, BibTeX, EndNote, or Zotero files and download the file.
* Within Mendeley Desktop, click on File on the top toolbar, and then Import. Select the file type you want to import, or drag and drop the downloaded file.

Activity 10. Create a reference by dragging in a pdf to Mendeley Desktop

* Download a pdf to the library screen and let it create a reference
* Correct the reference in the Edit panel if necessary

Activity 11. Install MS Word Plugin (Mendeley Cite-O-Matic)

* Select Tools from the top toolbar of Mendeley Desktop, and then Install MS Word Plugin
* The plugin will appear under References in the ribbon. It looks like this:



* Now you can write a paper, insert citations in the style of your choice while writing, and create a matching bibliography at the end.