MENDELEY USING GUIDE

CONTENT

CREATE MENDELEY INSTITUTIONAL ACCOUNT

Access to Mendeley Institutional edition (free service to all Technion community) requires* a Technion user account (CAMPUS, STAFF, TX or T2).

To gain access to Mendeley Institutional edition, you should create new Mendeley Institutional account or upgrade existing free account:

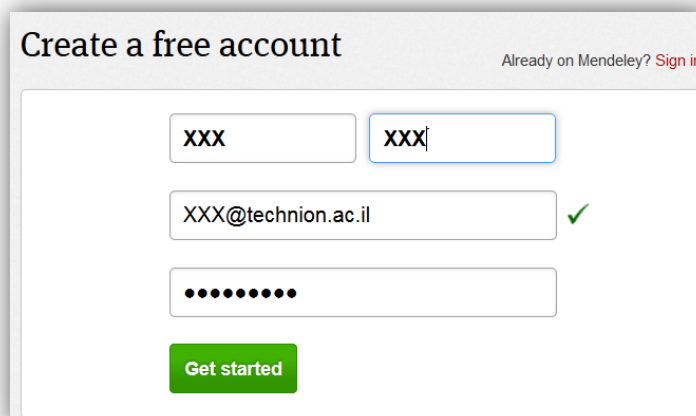- ✓ Create new Mendeley Institutional account
- ✓ Upgrade existing free Mendeley account

CREATE NEW MENDELEY INSTITUTIONAL ACCOUNT

To create new Mendeley Institutional account, go to Technion Mendeley Institutional Edition and click *'Join this Group'*:
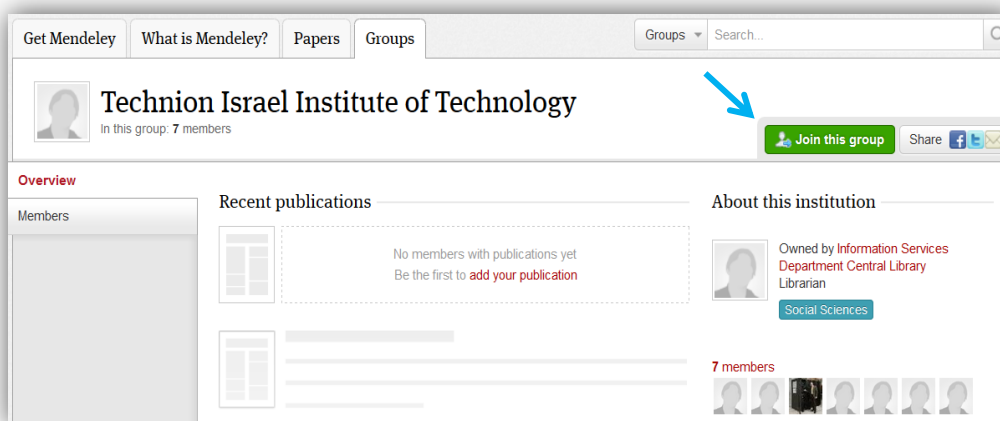
Fill in required fields (first and last name, email, password) and click *'Get Started'*.

You can use your Technion or another account.

Complete your profile by selecting your field of study and academic status:

Hi E. Let's complete your profile.

Computer and Information Science

Ph.D. Student

Finish   By clicking finish I agree to the terms of use.

By clicking *'Finish'* you will agree to the terms of use.

You will be asked to confirm your Technion user account (CAMPUS, STAFF, TX or T2):

Enter your institutional e-mail address

Please confirm your **technion.ac.il** e-mail address to join this group. This can include subdomains, e.g. *department*.technion.ac.il:

XXX@technion.ac.il

Close   **Confirm**

The verification e-mail will be send to your Technion e-mail. Click on the link inside to join:

Hi Neda,

You're almost done! Click the link below to receive your premium upgrade.

http://www.mendeley.com/join/verify/28ff94d4a1/noas%40tx.technion.ac.il/

Use Mendeley to organize your research, collaborate with others online, and discover the latest research.

- Automatically generate bibliographies
- Collaborate easily with other researchers online
- Easily import papers from other research software
- Find relevant papers based on what you're reading
- Access your papers from anywhere online
- Read papers on the go, with our new iPhone app

(If the link above doesn't work, just copy and paste the link into your browser)

UPGRADE EXISTING FREE MENDELEY ACCOUNT TO THE INSTITUTIONAL

To upgrade existing free Mendeley account, sign in search for the group *'Technion Israel Institute of Technology'* on Mendeley website:

Click *'Join this group'*:

You will be asked to confirm your Technion user account (CAMPUS, STAFF, TX or T2):
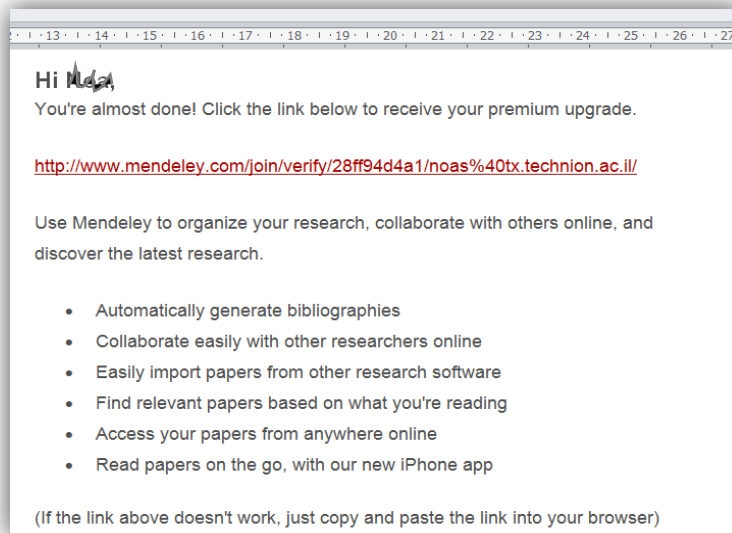
Enter your institutional e-mail address

Please confirm your **technion.ac.il** e-mail address to join this group. This can include subdomains, e.g. *department*.technion.ac.il:
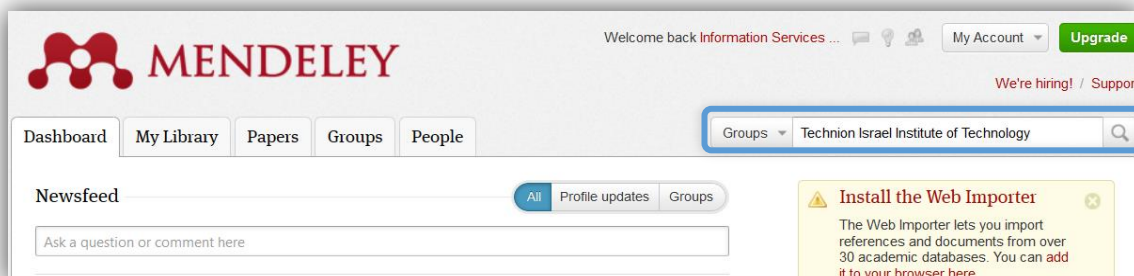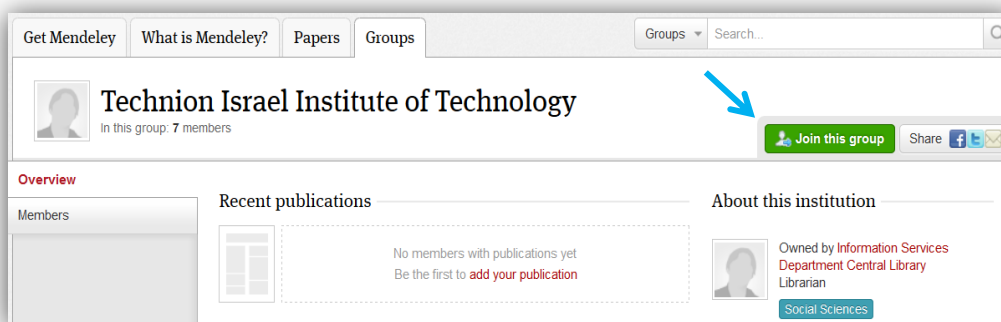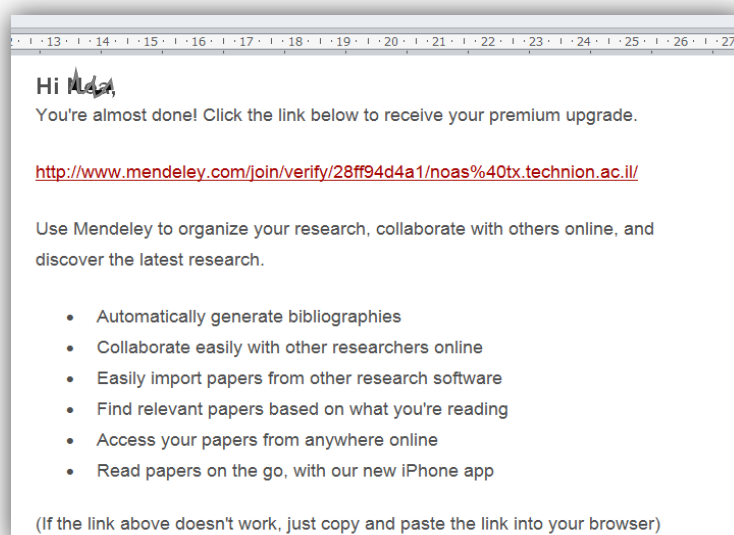
XXX@technion.ac.il

Close   Confirm

The verification e-mail will be send to your Technion e-mail. Click on the link inside to join:

Hi Noas,
You're almost done! Click the link below to receive your premium upgrade.

http://www.mendeley.com/join/verify/28ff94d4a1/noas%40tx.technion.ac.il/

Use Mendeley to organize your research, collaborate with others online, and discover the latest research.

- Automatically generate bibliographies
- Collaborate easily with other researchers online
- Easily import papers from other research software
- Find relevant papers based on what you're reading
- Access your papers from anywhere online
- Read papers on the go, with our new iPhone app

(If the link above doesn't work, just copy and paste the link into your browser)

START USING MENDELEY

To start using Mendeley you should create an account and download the desktop program to your computer.

- ✓ Download the desktop program
- ✓ Install the web importer

DOWNLOAD THE DESKTOP PROGRAM

Immediately after creating new account you will be able to download Mendeley Desktop.

Or visit http://www.mendeley.com/download-mendeley-desktop/ and click *'Download Mendeley Desktop'*:

MENDELEY DESKTOP FOR DIFFERENT SYSTEMS:

Windows

Mac

Linux

Mendeley App (iOS)

INSTALL THE WEB IMPORTER

Install the Web Importer to import references from different databases to Mendeley Desktop in the easiest way.

You can download the web importer in two ways.

Go to http://www.mendeley.com/import:

1. Drag the *'Save to Mendeley'* button to your bookmarks toolbar or to your bookmarks.

2. Right-click on the button and choose to add this link to your bookmarks.
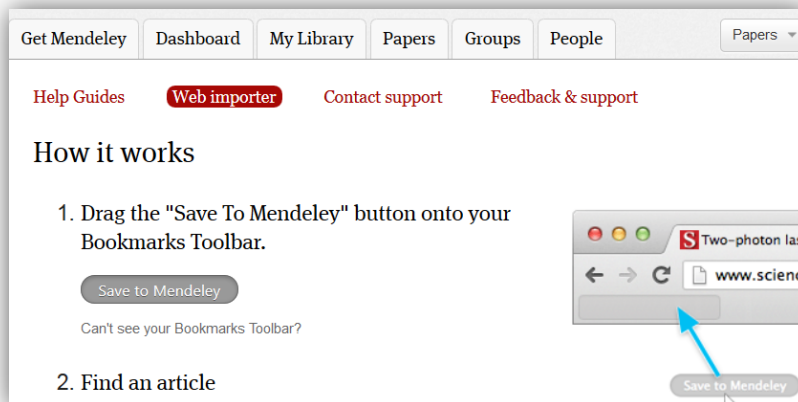
You can do this later from the Dashboard tab in the Tools menu on the online version or from 'Tools' menu in Mendeley desktop.

Mendeley Web Importer supported sites (please scrawl dawn).

ADDING REFERENCES FROM DATABASES AND WEBSITES

There are some ways to import/ enter records metadata:

- ✓ Adding references by using 'Save to Mendeley' button
- ✓ Adding references in a classical way
- ✓ Adding references by creating RIS file
- ✓ Adding references manually
- ✓ Adding references by dragging PDFs files
- ✓ Adding references from existing software (Refworks)

ADDING REFERENCES BY USING 'SAVE TO MENDELEY' BUTTON

'Save to Mendeley' button is compatible with the most popular Technion Databases:

Engineering Village (Compendex, Inspec, NTIS), Google Scholar, Scopus, Web of Science, PubMed.

Full list of Mendeley 'Web Importer' supported sites (please scrawl dawn).

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To 'grab' the reference, click on the *'Save to Mendeley'* button:
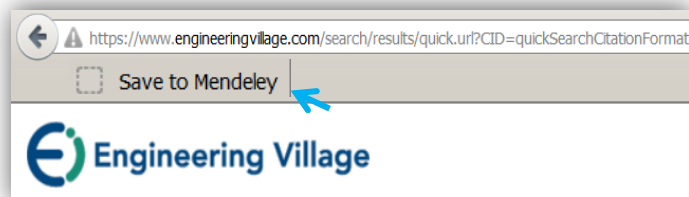
If there are multiple references, click the sign *'plus'* next to each reference you wish to export from the list on the right hand side of the page:
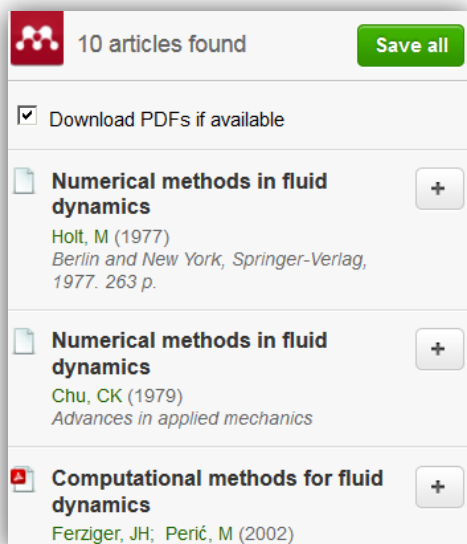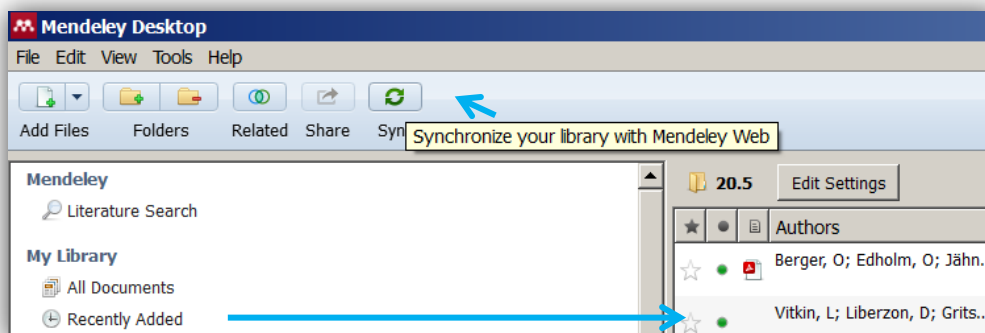

If there is one reference, choose the folder to store it and click *'Save'*:
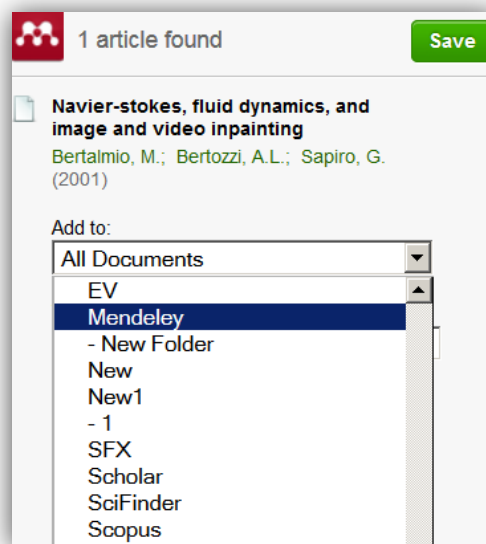
*The option to include the PDFs is available for references with free or Technion access.

Next time you sync Mendeley Desktop, saved articles will appear in the *'Recently Added'* folder:

ADDING REFERENCES IN A CLASSICAL WAY

If there are multiple references, mark each reference you wish to export, click *'Download'/ 'Export'/ 'Save to'* (depend on database), select *'Mendeley'* and click *'Save'*:
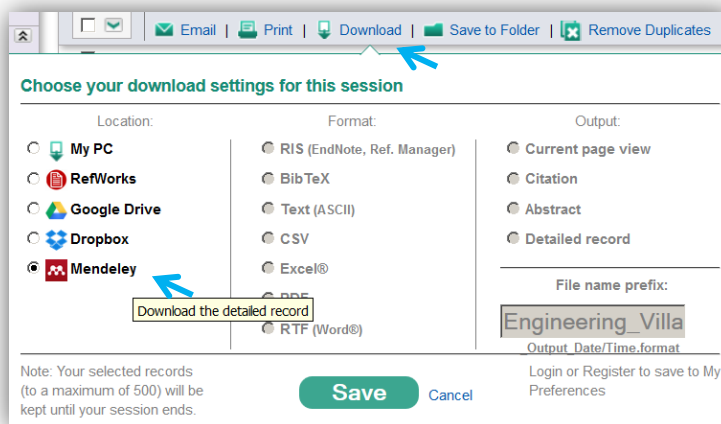
ADDING REFERENCES BY CREATING RIS FILE

PROQUEST DATABASES

If there are multiple references, mark each reference you wish to export, select *'RIS'* from the drop-down list on *'Export/Save'* option:

To save a RIS file with your citation information, click *'Continue'* and the file will be downloaded automatically.

During the download, select *'Open File'* option to export it directly to your Mendeley Desktop.

Saved articles will appear in the "Recently Added" folder.

SCIFINDER

If there are multiple references, mark each reference you wish to export and click *'Export'*.

Select the option *'Citation export format (*.ris)'* and click *'Export':*

During the download, select *'Open File'* option to export it directly to your Mendeley Desktop.

Saved articles will appear in the *'Recently Added'* folder.

ADDING REFERENCES MANUALLY

To add references manually, click *'Add Files'* button on the in the upper-left corner of the interface and from the drop-down list select *'Add Entry Manually'*:
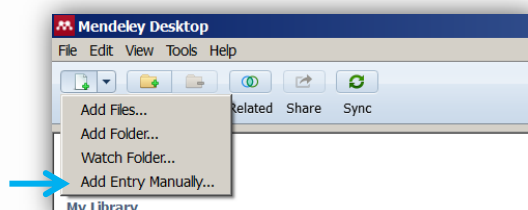
A pop-up window will appear. Select the type of material you wish to add (e.g. book, book section, document, journal article, etc.), fill in metadata fields and click *'Save'*:

ADDING REFERENCES BY DRAGGING PDF FILES

DRAG AND DROP

Individual PDFs or folders can also be dragged from your computer into your Mendeley Desktop.

Mendeley will try to automatically extract the citation information.

Verify that the information is accurate and full. Missing details can be added manually by typing them in the relevant fields:

Not all PDFs will automatically convert into Mendeley records.

ADD FILES/FOLDER

Click on the *'Add Files'* button to the top left of the screen and navigate to the folder where the PDF is stored. Select a document and click *'open'*:
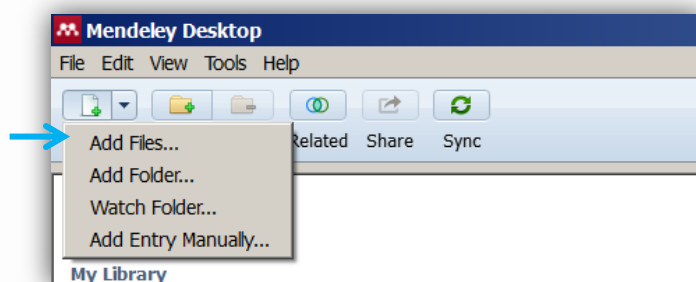
WATCH FOLDER

References from *'Watch Folder'* on your computer will be added automatically to Mendeley Desktop.

To set up this option, create folder on your computer you want to be the dedicated pdf folder for automatic reference import. Then click on the *'Add Files'* button to the top left of the screen of Mendeley Desktop and navigate to this folder:
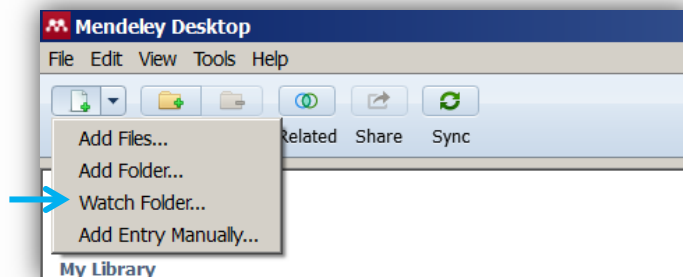
ADDING REFERENCES FROM EXISTING SOFTWARE (REFWORKS)

EXPORT YOUR LIBRARY

Log into your RefWorks account.

To export all references go to *'References'* menu and click *'Export'*:
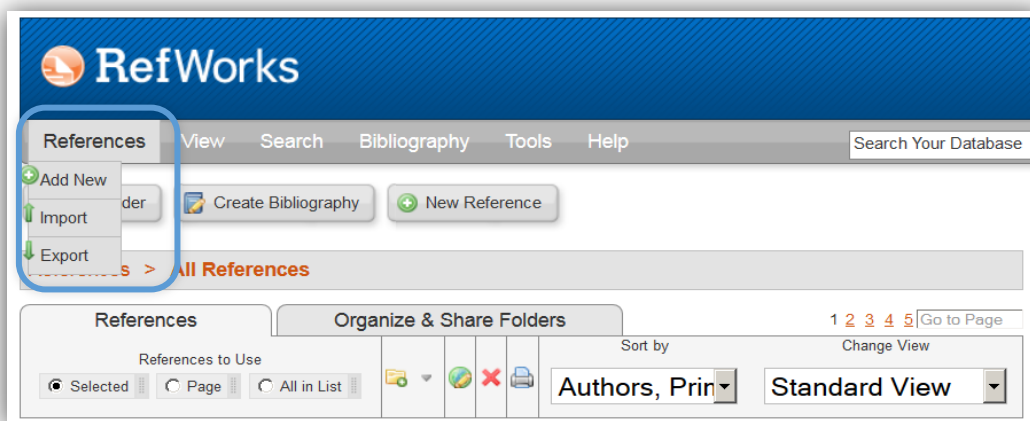
Select *'Bibliographic Software'* as the export format and click 'Export References':
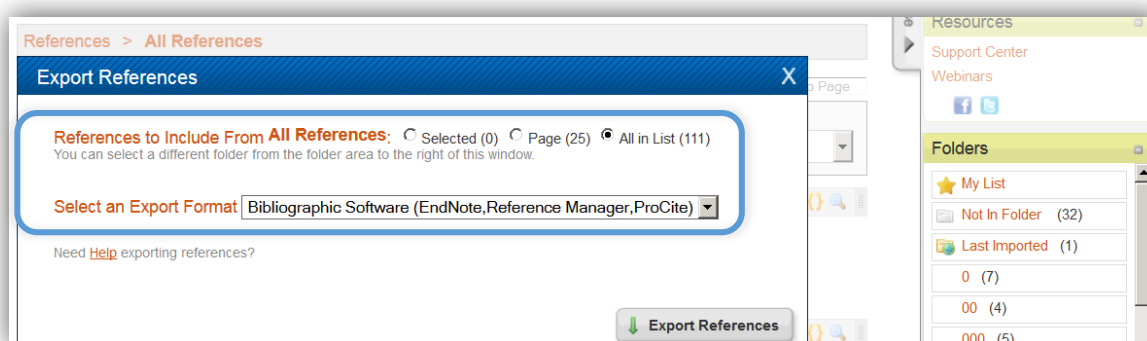
To export references from a special folder, click name of this folder from folders area to the right of the window:
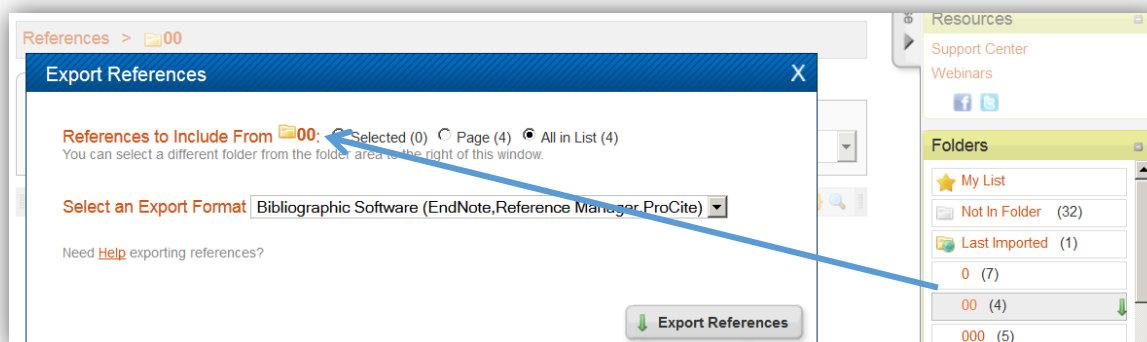
Note: Alternatively you can export in BibTeX format

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IMPORT REFERENCES INTO MENDELEY DESKTOP

Open Mendeley Desktop.

Go to File menu and click *'Add Files'*:
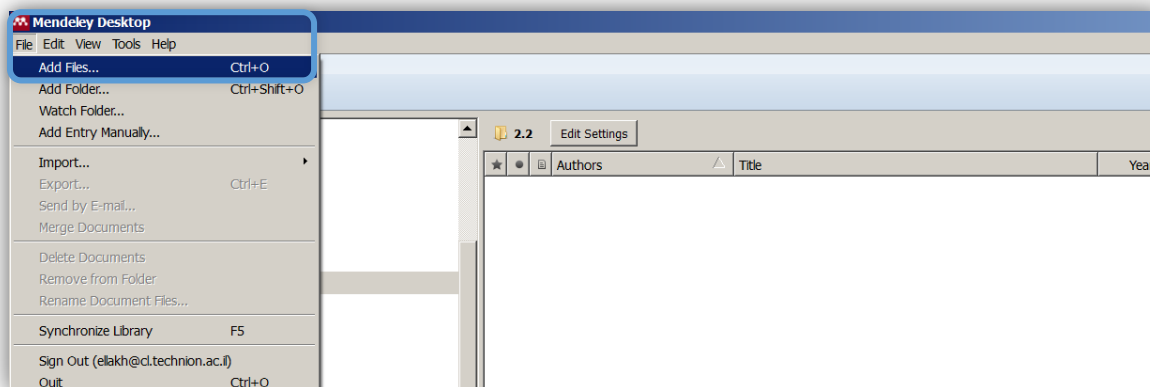
Select the file you exported from RefWorks.

All references should be imported automatically.

To import references by folder, you should firstly create a new folder in the Mendeley Desktop and select it while importing.

To create folders in Mendeley Desktop click right and choose *'New Folder'*:
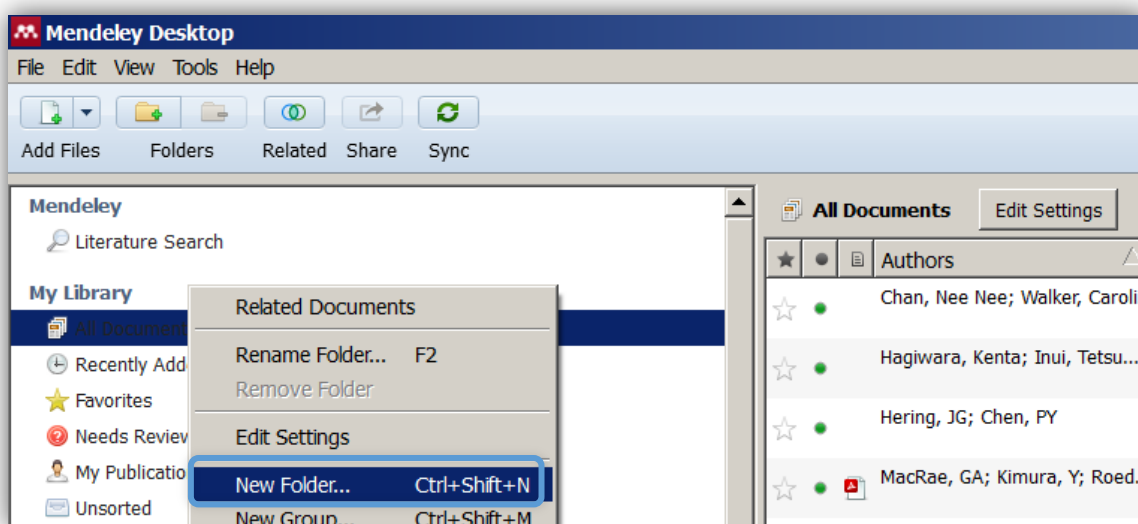
*Note: To add PDF files from RefWorks to Mendeley you will need to download them manually and add them to Mendeley.

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ORGANIZING MENDELEY LIBRARY

- ✓ [Folders & sub-folders](#)
- ✓ [Filters](#)
- ✓ [Records view](#)
- ✓ [Record's details](#)
- ✓ [View and annotate PDFs](#)

FOLDERS & SUB-FOLDERS

To organize your references, use folders & sub-folders.

To create folder, click on the *'Folders'* button to the top left of the screen (or right click in the left pane of the desktop) and create title for a new folder.

To create sub-folders stay on the folder for it you want a sub-folder, click on the *'Folders'* button (or right click in the left pane of the desktop) and create title for a new sub-folder.
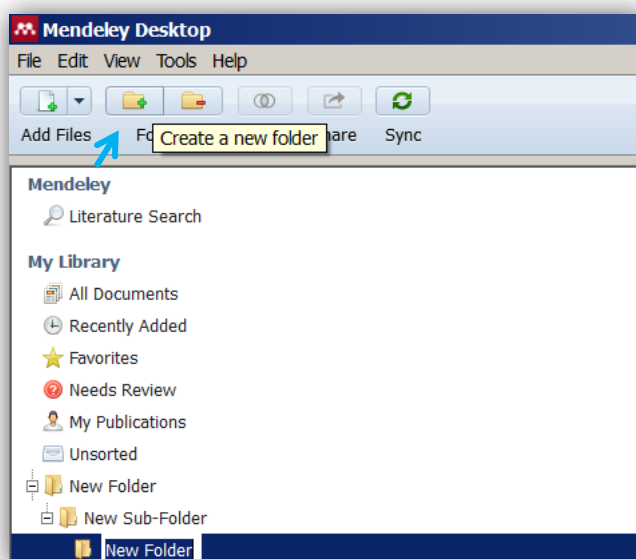
To add references to the new folder/ sub-folder, drag them from the *'Recently Added'* folder:
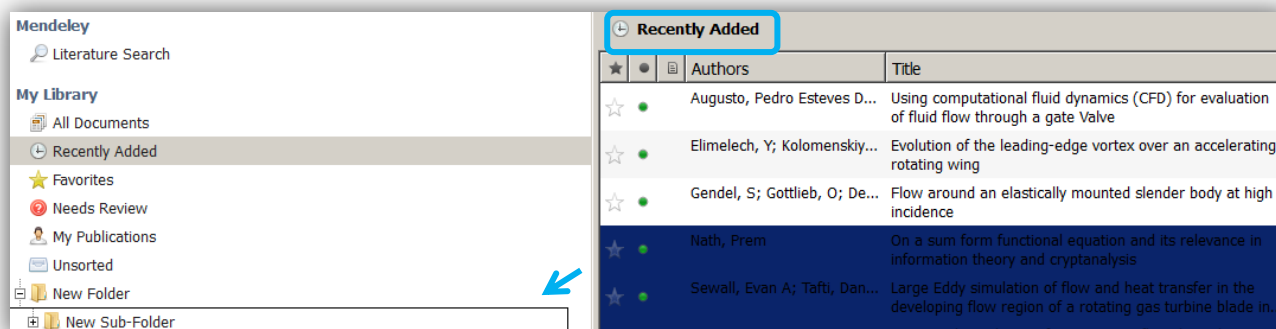
References can be put in more than one folder.

FILTERS

TAGS

To organize your references you can assign tags.

To add tag/tags to the reference you've added to your Mendeley desktop, click on the field *'Tags'* on the pane of record's details:
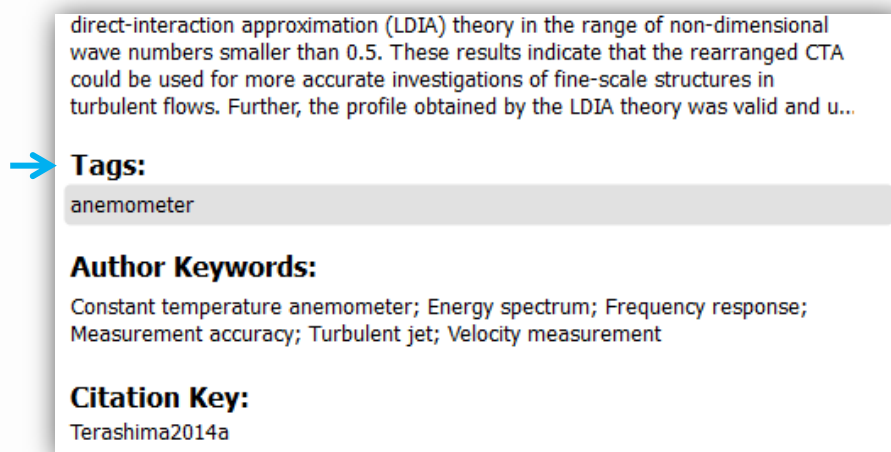
To find all articles with a particular tag, select *'Filter by My Tags'* from the drop-down list to the bottom left of the screen and click the appropriate tag:
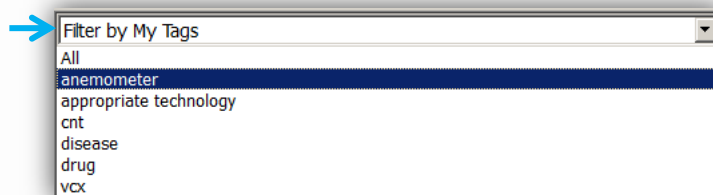
Some references you've added to your Mendeley desktop can come with tags already.

FAVORITES

Use star icon to mark favorite documents:
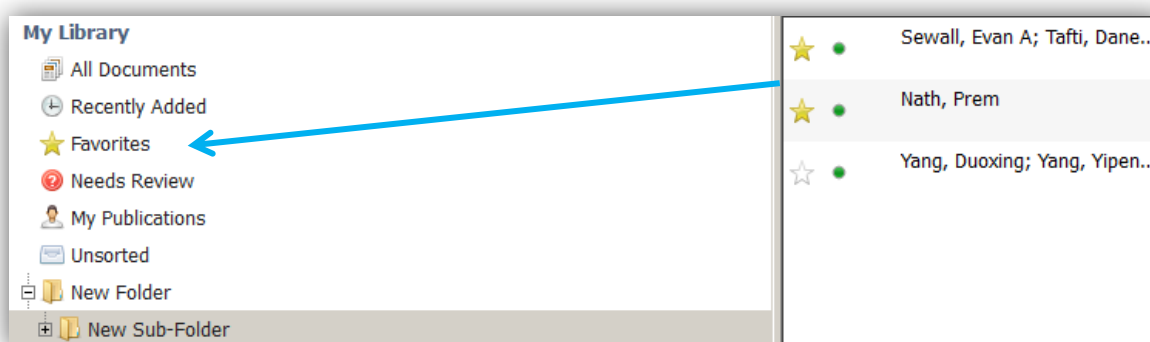
READ/UNREAD

Mark documents as read or unread using the green circle:
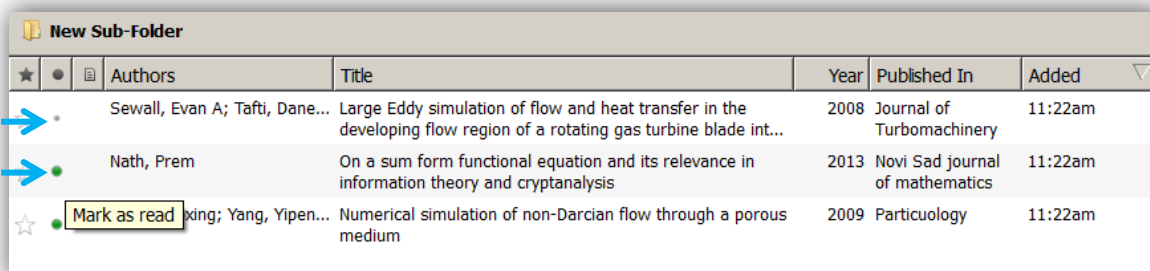
RECORDS VIEW

To change view of references (middle pane) to citation view, click on the *'View'* button on the Menu Bar and in the drop down menu select *'Library as Citations'*:
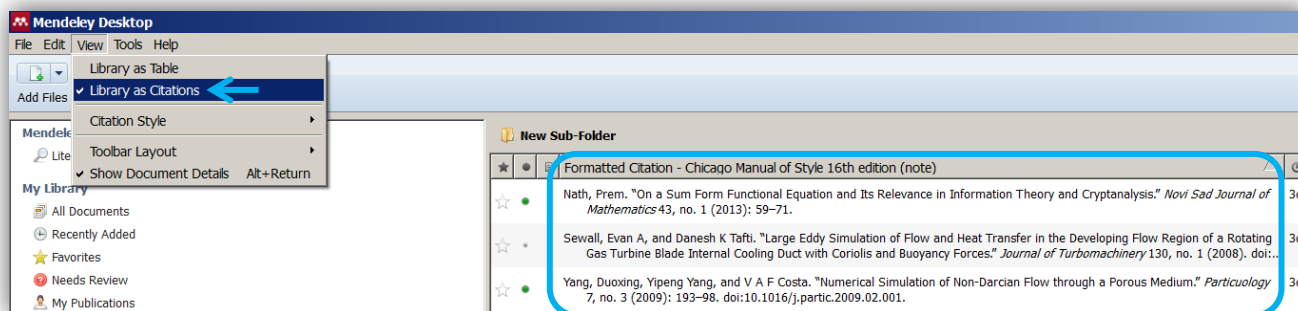
To change style of citation, select *'Citation Style'* and choose an appropriate style in this *'View'* drop down menu:
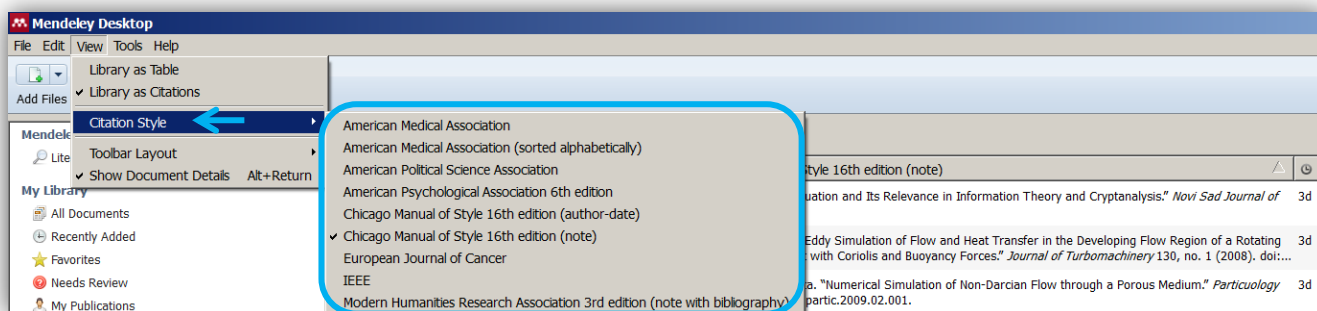
To sort references by type of document indicator (.pdf, MS Word, etc.), authors, title, year, publication or date added to Mendeley Desktop, click on any of these headers:

RECORD'S DETAILS

To add/ change details for a special record, click on the particular field on the *'Details'* tab:

To attach PDF file to metadata, scroll down to the field *'Files'*, click *'Add File'*, navigate to the folder where the PDF is stored, select a document and click *'Open'*.

To check where Mendeley has saved PDF on your computer, right mouse click on a pdf and select *'Open Containing Folder'*:
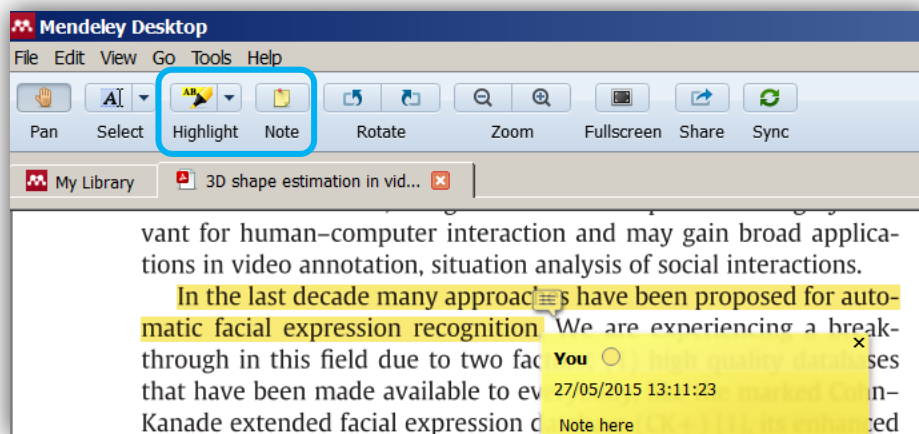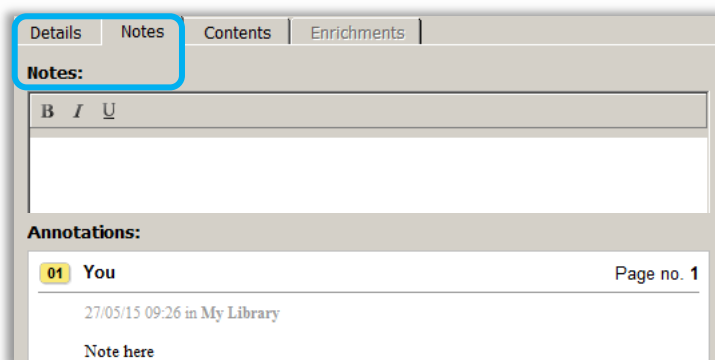
VIEW AND ANNOTATE PDFS

Once PDFs have been added to your Mendeley Desktop, you can click the PDF icon or double-click on the reference to read, highlight and annotate attached documents. The PDF will be opened by the PDF viewer in a separate tab:
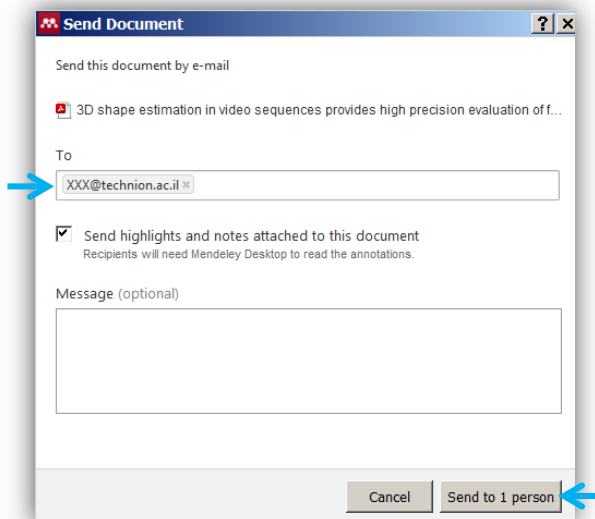

Your annotations can be viewed in the *'Notes'* tab, next to the *'Details'* tab on the right pane:

To share PDF file with annotations and notes, click *'Share'* button.

In the appeared pop-up window, enter e-mail of recipients and click *'Send to … person'*:

* *It is only possible to share PDFs in Private Groups.*

SHARE

Create groups to share information with others.

There are 3 types of groups:

- ✓ Private Groups (content is visible only to invited members of the group)
- ✓ Public Invite-only Groups (content is visible to everybody, but only members can contribute to them)
- ✓ Public Open Groups (content is open, everybody can join and contribute to)

* *Free version of Mendeley allows you to create 1 private group with 3 members.*

To create a group you can in 2 ways:

FROM THE DESKTOP

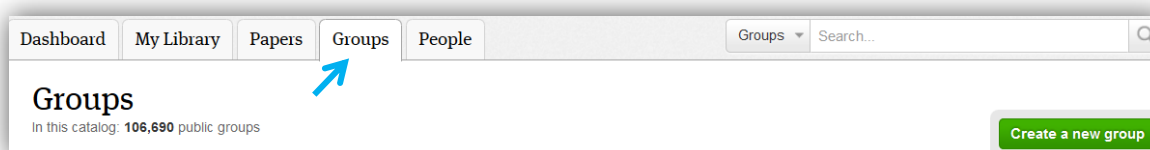In the left panel of Mendeley Desktop, click *'Create Group*':
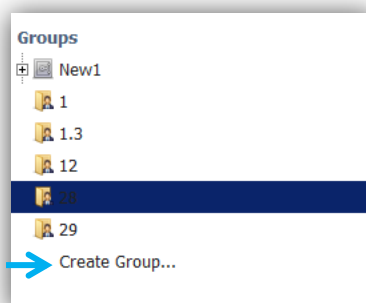
A pop-up window will appear. Create group name and description, and choose the type of group. Then, click *'Create group'*:

Enter the email addresses of the people you would like to invite to your group.

FROM THE MENDELEY WEB

Select the *'Groups'* tab and click *'Create a new group'* button in upper right corner:

ADDING REFERENCES TO A GROUP

To add references to the group, drag them from your Mendeley library.

Attached documents can be dragged to private groups only.

Click the Sync button in the toolbar to share references and documents with group members.
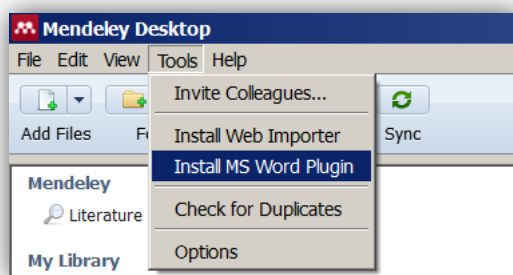
CREATE CITATIONS AND BIBLIOGRAPHY

- ✓ Install MS Word Plug In
- ✓ Insert citations
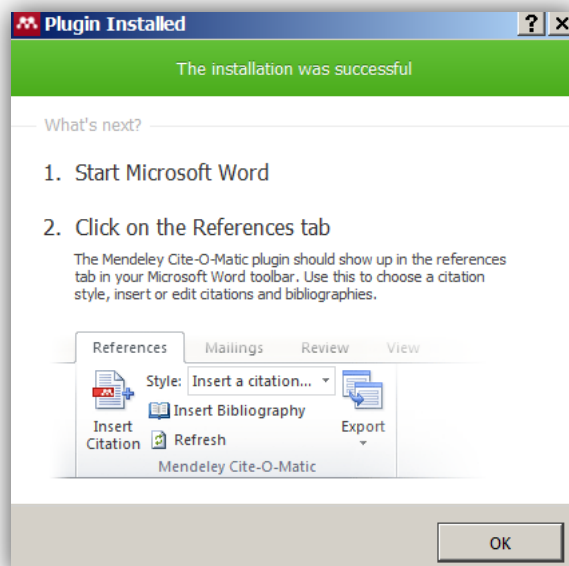- ✓ Create bibliography
- ✓ Citation styles

INSTALL MS WORD PLUG IN

To insert citations to a paper and to create a bibliography, you will need to install a citation plug-in.

To install a citation plug-in, click *'Install MS Word Plug In'* from *'Tools'* menu:
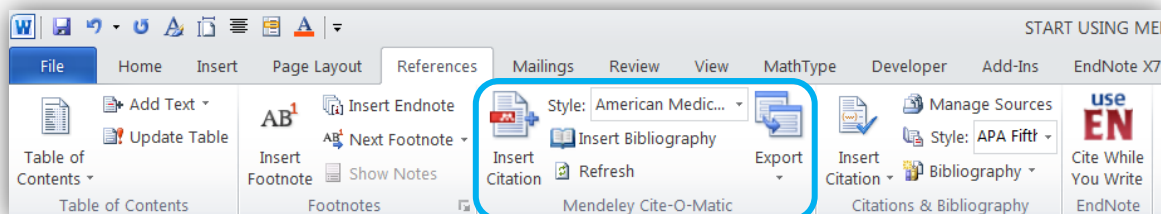

A pop up menu will appear indicating successful installation. Click *'Ok'* and open your MS Word document:

*Be noted, all office documents should be closed during installation.*

INSERT CITATIONS

The Mendeley Cite-O-Matic plug-in will appear in the *'References'* tab in the Word toolbar:
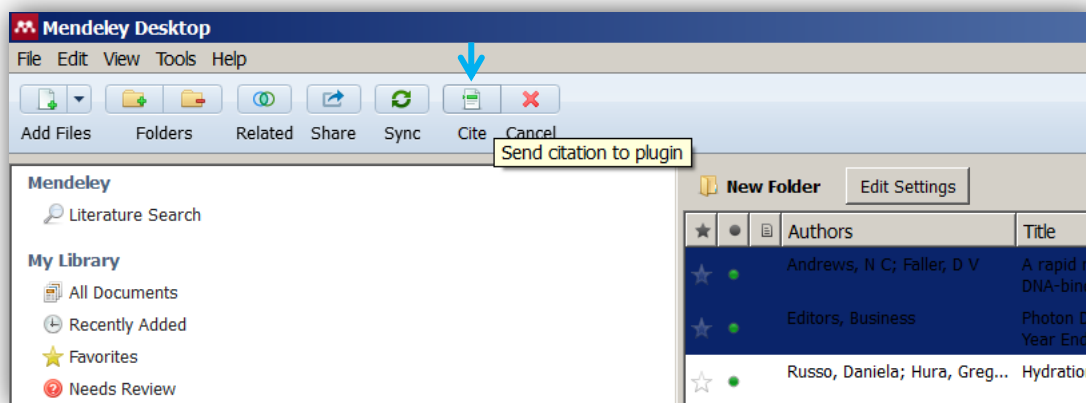

To insert a citation, place cursor where you want the citation in the document and click *'Insert Citation'*.

In the appeared search window, start to enter a search term to bring up the citation you need:
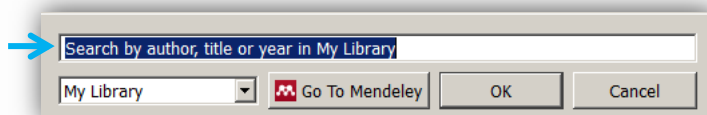
Or (advanced) click *'Go to Mendeley'* in the appeared window and select one or more references from the list. Then click *'Cite'*:

*References can be inserted from Groups as well.

CREATE BIBLIOGRAPHY

To create bibliography, click *'Insert Bibliography'* button in the end of the document.

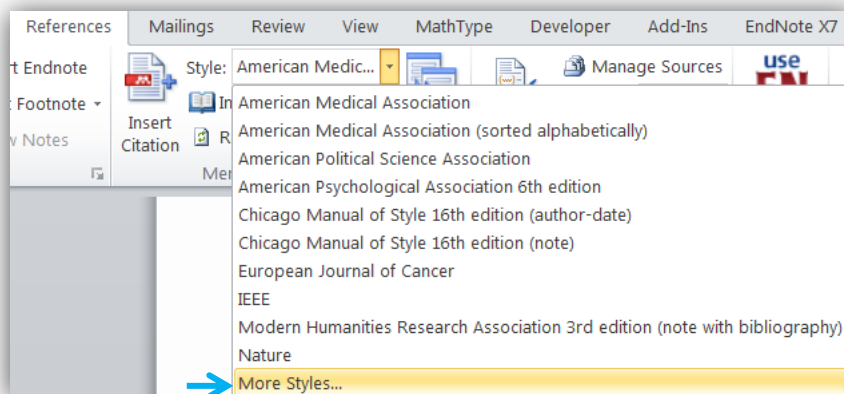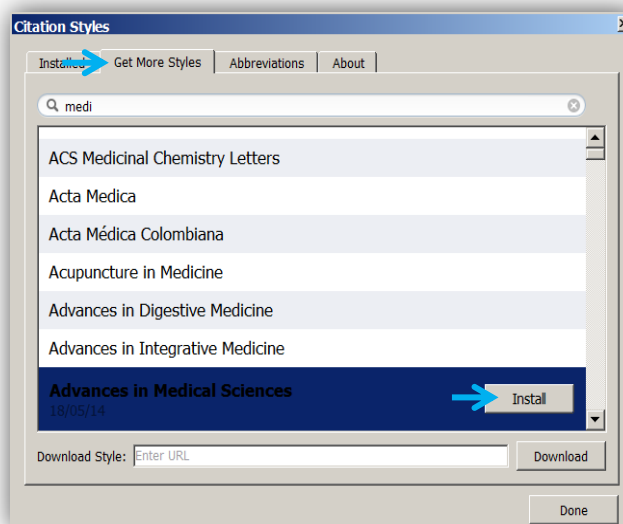**New citations will be added automatically to created list.*

CITATION STYLES

To change bibliographic styles, go to *'Styles'* in the Mendeley toolbar and choose a bibliographic style from the style dropdown list.

MORE STYLES

To download more styles to your Word list of styles, click *'More styles'*:

In the appeared window search for the style you need and download it:


The downloaded style will be shown in your Word style's list.

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EDIT RELATED STYLE

To edit related style, go to *'Citation Style Editor'* (CSL).

Right click on the style closest to the one you need from a list of styles that are currently installed and click *'Edit Style'*:
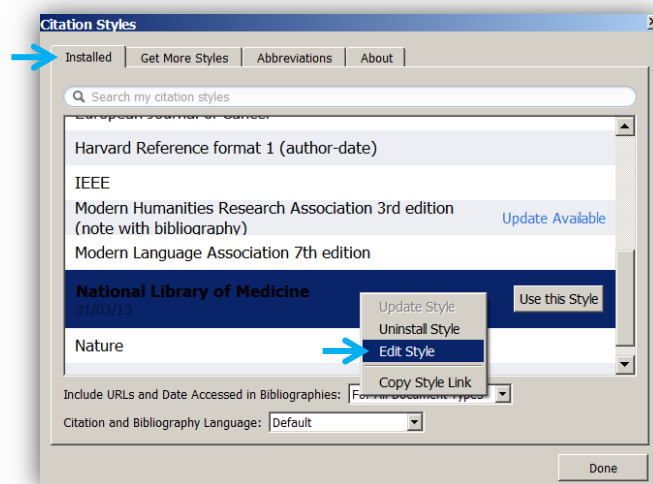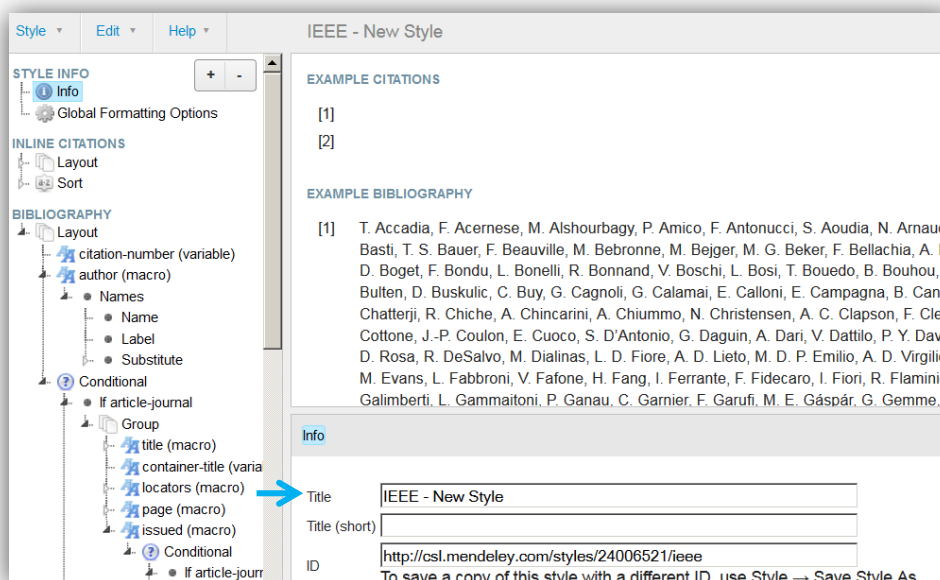
The style editor will ask for permission to access your account.

After authorizing the style editor will create a new style based on the one that was selected.

Automatically the title of the new style will include your name: *IEEE – Your Name*

To change the title, click in the Title box in the options below the example citation and enter the new title:

The style ID will be created automatically.

To make changes, click on the relevant part of the inline citations or bibliography entry on the left pane. The tool will open the options are available to be changed.

For example, to limit the number of authors shown in bibliography go to *'Bibliography'* section on the left pane.

Select *'Author (macro)'* and choose *'Name'* in the *'Names'* section:
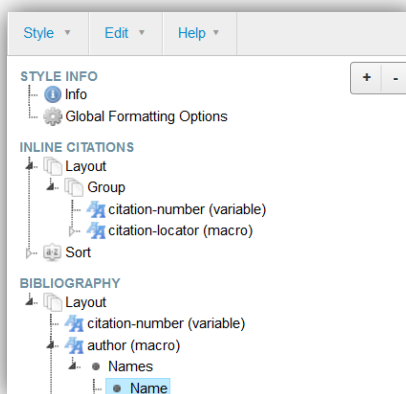
In the opened field *'et-al-min'* choose relevant number of authors to be shown:
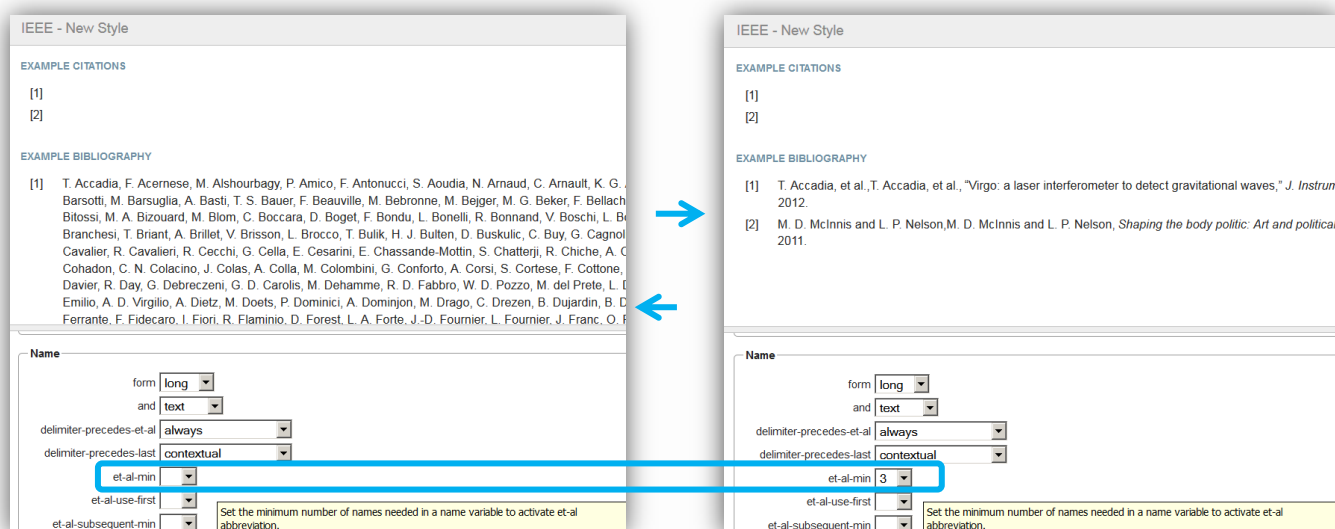
To save your style, got to *'Style'* and from dropdown list select *'Save Style'*: