

Day3, part2. Reference management: Mendeley

Digital Skills for Research

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What we have covered so far

Reflect on your progress and see whether you can recall these learnables:

Slides in Beamer

1. golden rules for good slides
2. beamer as a document class, hand-out mode
3. overlays
4. standard themes/layouts
5. own style (.sty or in main.tex)
6. poster library in beamer

Citations

1. referencing styles
2. embedded and external bibliographies
3. bibtex and biblatex (+ biber)
4. natbib
5. plainnat, apalike, .bst
6. `\nocite{*}`

Are you a Mendeley or a Zotero person?

1 Basic uses and setting up

Download and setup [Mendeley](#) (Mendeley Reference Manager v2.67.0; from 1 September 2022, users will **no longer** be able to download and install **Mendeley Desktop** software; support continued for pre-existing Desktops) or

1.1 Consider Zotero as an alternative

Reasons:

- Zotero is open source
- it is integrated with Overleaf (as well as proprietary Mendeley)
- it is mentioned as the first-choice alternative in many forums and communities (unlike proprietary RefWorks, which has no Linux distribution)



1.2 Key benefits of Mendeley/Zotero with Demo

(see Mendeley/Zotero functional comparison [here](#))

1. systematised and all in one place!
 2. searchable (e.g. title:complexity, author:sinclair; case-insensitive)
 3. backup/sync via server <https://www.mendeley.com/> (Elsevier login)
 - Mendeley: 2GB of free online storage; I have 800 items, using 1.4GB
 - Zotero: free storage 300MB
 4. shareable (5 groups of up to 25 collaborators; 100MB shared web storage across)
 - use their registration email!
 5. upload and create references from PDF documents (from GoogleScholar or local/own PDFs)
 - Web importer or Tools tab in the menu (e.g. import [Automatically evaluating the conceptual complexity of German texts](#))
 - add a local file (use a dedicated folder to store manually added files)
 6. annotate your PDF documents with searchable comments, highlights and notes (e.g. for annotated literature review)
 7. copy formatted citations in the preferred (editable, updatable) style
 8. Word processor integration (Microsoft Word, LibreOffice Writer Tools -> Install MS/LO plugin)
 - go to 'Choose style' before generating References;
 - use Citation Editor (use Enter+left click in Linux or highlight the inserted citation in MS to bring up the editor window) to suppress author, to add page or comment and to merge citations);
 - use 'Go to Mendeley' to review the record and insert from Mendeley.
 - Cite them right gives the UoW flavour of Harvard! Check it out
- | | |
|---|------------------|
| Chicago Manual of Style 17th edition (note) | |
| Cite Them Right 10th edition - Harvard | Selected |
| Harvard reference format 1 (deprecated) | Update Available |
| IEEE | Update Available |
9. easy access to PDF to send via emails, if impossible to share via server (Show containing folder, left-click on the attached file in the right-hand bottom corner)
 10. search and merge duplicates (un-checked fields have conflicting data)

2 Advanced setups and limitations

- watched folder (e.g. Downloads/2mendeley) for files (inc. docx) from non-generic sources
 - Tools -> Options -> Watched Folder
- BibTex Syncing: export a .bib for each folder
 - Tools -> Options -> BibTex
- sexy, but an overkill: automatically update (and clean) the bib file in Tex project to integrate changes in a Mendeley folder
 - requires editing and running .sh with fswatch (a file change monitor) and editing .py; see [manage_bib](#) folder for instructions

My current issues with Mendeley

1. no Linux Distribution for the latest September 2020 Mendeley Reference Manager v2.67.0
2. throwback to Mendeley Desktop after each ‘insert citation’ in LO Writer
3. noisy/unadjustable bib exports (Tools -> Options -> Document details)
4. protected input in titles (do you need to stick to the original casing of the publication or do you want consistency in your References?)
5. bad month format July -> jul
6. impossible to uncheck some fields that are output by default for Document types in (I don’t want to output Abstract, keywords and Mendeley group, file path)

3 Library use and maintenance

Useful tips:

- decide on, and set up, the style of your citation keys e.g. [AuthorYear]
- download the published version (or replace relevant preprints as they get published) (see [GoogleScholar options](#));
- update the database;
- merge duplicate recordings;
- set up Tools -> Options -> Document Details for each type of source
- fill in details in full;
- clean up ‘Recently added’ and ‘Unsorted’ regularly

Task 3-7. Start your own library and/or demonstrate the following

- share a Mendeley folder with mkunilovskaya@gmail.com if you are using Mendeley;
- send me an editable document (.docx, .odt) with a screenshot of your library and a sample text with automatically imported in-text citations and plugin-generated References;
- send me a bib exported from one of the folders in your library.