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, handout 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
- $6. \setminus nocite\{*\}$

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:

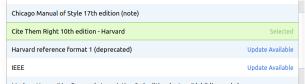
- Zortero is open source
- it is integrated with Overleaf (as well as proprietary Mendeley)
- it is mentioned as the first-choice alternative in many forums and communities (unlike proprietary RefWorks, which has no Linux distribution)



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



- 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

- $\bullet \ \ {\rm share} \ \ a \ \ Mendeley \ folder \ \ with \ \ mkunilovs kaya@gmail.com \ if \ you \ are \ using \ Mendeley;$
- 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.