

Mendeley is a freely available desktop-based reference manager that helps you to collect, organise and cite your references. It can be used on Windows, Mac, and Linux computers.

As Mendeley is software that is installed on your computer, it will work when your computer is online and offline.

Mendeley also has an online element with 2 gigabytes of free storage. This online element syncs with your desktop library, making your library of references accessible from any computer with an internet connection. It also facilitates synchronising of your desktop library across multiple computers.

Setting up Mendeley

To get fully up and running with Mendeley, you need to set up four things -

1. *A Mendeley account* – allows you to start using the reference manager.
2. *Mendeley Reference Manager for Desktop* – an application you download to your computer to access your reference library offline.
3. *Mendeley Web Importer* – A plugin for your web-browser that allows you to add records for sources to your Mendeley library straight from online catalogues, databases, and websites.
4. *Mendeley Cite* – An Add-in for Microsoft Word that allows you to add citations and bibliographies to documents. A separate, citation plug-in is also available for LibreOffice

Creating a Mendeley Account

To use Mendeley, you must create an account. This can be linked to an existing Elsevier account you may have and your Oxford Sign On (SSO) details.

1. Go to <https://www.mendeley.com>
2. Click on the '**Create account**' link at the top of the screen and follow the on-screen instructions to create a Mendeley account.

Installing Mendeley Reference Manager for Desktop

You can use Mendeley online through a web-browser, but to be able to access your references off-line, you need to download the Mendeley Reference Manager for Desktop. It is already installed on the computers at IT Services. However, if you are using your own computer, please follow these instructions:

1. Visit the website <https://www.mendeley.com/reference-management/reference-manager>
2. Click the **Download Now** button and select from the next web page the relevant version for your operating system (Windows, Mac, or Linux)
3. Complete the installation process and open Mendeley Reference Manager on your computer
4. Open the Mendeley Reference Manager on your computer. You will be prompted to enter your Mendeley account username and password.
5. You will now see an empty Mendeley library.

Mendeley Cite

Mendeley Cite is a piece of software called a plugin which enables you to insert references from your Mendeley library into a word-processed document. It is compatible with Microsoft Office 365, Microsoft Word versions 2016 and above, and with the Microsoft Word app for iPad.

Mendeley Cite is not installed on the computers at IT Services, so you will need to follow the steps below.

1. Open Mendeley Reference Manager on your computer
2. Click **Tools** followed by **Install Mendeley Cite for Microsoft Word**
3. You will be taken to the Microsoft AppSource site in your web browser. Click **Get it now**
4. You will be prompted to login using a Microsoft account. If you are using Word via the University's Office365 licence, login with your university username (e.g. ab123456@ox.ac.uk) and password. If you have a personal licensed copy of Microsoft Office, use those login details instead
5. Once signed in, click **Get it now**
6. Click **Open in Word** and **Yes** to the trustworthy source message
7. Word will open and the Mendeley Cite panel will appear on the right of the screen.

The **Mendeley Cite** button should appear in the **References** tab in the ribbon across the top of Word. Click this button whenever you need to open Mendeley Cite in Word.

Collecting references

There are a variety of ways to add references to your Mendeley library:

- Mendeley Web Importer browser plugin
- Drag and drop PDF files
- Import text files
- Search the Mendeley Web Catalog
- Manual entry

Try as many of the options as you like by following the steps below.

Mendeley Web Importer browser plugin

The Web Importer browser plugin is added to your web browser so that you can capture details from the web and add them to your Mendeley library. You will first need to add the plugin to your browser:

1. Open Mendeley Reference Manager, click **Tools** followed by **Install Mendeley Web Importer**
2. You will be taken to your web browser where you should follow the on-screen instructions for the web browser you are using
3. Once installed, the Web Importer button will appear on your browser.

To use the Web Importer browser plugin:

1. Navigate to a website. In this example, we will go to the website PubMed. Go to Databases A-Z (which lists all the databases the Bodleian Libraries subscribes to) via <https://libguides.bodleian.ox.ac.uk/az.php>. Search for **PubMed** in the search box and open the database from the results
2. Enter a search term into the search box, e.g. childhood obesity, and click **Search**

3. In the results screen, you might like to experiment with the sort and filter options to refine your results
4. Once you have found an item you would like to add to your Mendeley library, click on the title for the item to open the full record
5. Click the Web Importer button in your browser (you may need to navigate to the browser extensions and open it from there)
6. A panel will open on the right of your screen. You may need to sign into your Mendeley account the first time so that the plugin is able to save the bibliographic details to your Mendeley library
7. The Web Importer will display the references it has detected on the web page. Select those you would like to add to your Mendeley library by ticking the check boxes
8. Click the **Add** button at the top of the pane. The references and any associated PDFs will be added to your Mendeley library.

Drag and drop PDF files

If you drag and drop a PDF file into Mendeley, the software will extract metadata from the file and produce a reference in your library automatically. Note that the reference produced depends on the quality of the PDF. It works best with full-text PDFs of articles or book chapters.

To try this method:

1. Locate a full-text PDF file, e.g. via the platform PubMed. Go to Databases A-Z via <https://libguides.bodleian.ox.ac.uk/az.php>. Search for **PubMed** in the search box and open the database from the result
2. Conduct a search in PubMed, e.g. childhood obesity, and click **Search**
3. In the results page, locate and download a PDF file of an article or paper
4. The file should be saved in the Downloads area of your computer. Navigate to and open the file explorer on your computer, opening the Downloads folder
5. Adjust the display on your computer so that you have your Mendeley Reference Manager window and file explorer window open side-by-side
6. Click on the downloaded PDF file and drag it over your Mendeley window, then 'drop' the file by releasing the button on your mouse/trackpad
7. Mendeley will automatically produce a reference and attach the PDF file to the reference.

Import text files

Some databases support the export of text files which you can upload to Mendeley Reference Manager. Mendeley will read the tagged text file and convert it into a reference, adding it to your library.

1. For this example, we will navigate to the database Bibliography of British and Irish History. Go to Databases A-Z via <https://libguides.bodleian.ox.ac.uk/az.php>. Search for **Bibliography of British and Irish History** in the search bar and open the database from the results screen
2. Conduct a search by entering text in the **Search anywhere** box, e.g. cotton industry, and click **Search**
3. Open one of the records from the results screen by clicking its title
4. At the top of the next screen which displays the full record, click **Export**
5. In the **File name** box, rename the file to something memorable
6. Keep **Method of export** as the default **Download**

7. Under the **Format** options, select. **ris–Research Information Systems Format** followed by **Export**
8. The text file will be downloaded to your computer and should appear in your Downloads folder
9. Open Mendeley Reference Manager, click + **Add reference .ris –Research Information Systems Format**. Select **Import file(s)**
10. Locate the relevant file in your Downloads folder and open
11. The reference will be added to your Mendeley library.

Search the Mendeley Web Catalog

Mendeley maintain their own catalogue of literature records. This is produced by anonymously harvesting details of all the references added to Mendeley libraries by users and placing them in the online catalogue.

1. Open Mendeley Reference Manager.
2. Click the **tools** menu and select the **Search for articles online** option.
3. A page will open on your default web-browser. This provides you with a search box to find things in the Mendeley catalog. It works best if you are signed into your Mendeley account.
4. Look at the top right of the webpage, if you see your name, you are already signed in. If you see a **sign in** link instead, click on this and sign in using your Mendeley account details.
5. Into the search box on the webpage, type in some keywords you would like to look for articles on, e.g. plate tectonics, and click on the button labelled **Search**.
6. After a few seconds you should see a page of search results. You can use the options on the left-hand side of the screen to further refine your search by year, document type etc.
7. Underneath each record you will see an option to **+Add to Library**. Click this option under two or three of the records. As you select each record it will be added to your Mendeley library and available through Mendeley Reference Manager.

Manual entry

Entering references manually should only be necessary as a last resort if none of the other options are available. You might need to enter references manually if you are working with, for instance, special collections materials that do not have an online catalogue record available.

To add references manually:

1. Open Mendeley Reference Manager
2. Click **+ Add references** then, from the dropdown, **Add reference manually**
3. In the pane that opens on the left, select the **Reference Type**, e.g. 'Journal Article.' The reference type impacts what fields are available for you to fill in
4. Enter details about the item, such as title, author, publisher, etc.
5. Alternatively, if you know the DOI, PMID or ArXivID identifier, enter that in the field at the top of the pane and click the magnifying glass icon search button. Mendeley will try to find the relevant item and automatically fill in the fields of bibliographic information
6. Once you have finished, make sure to click **Add item** at the bottom of the pane.

Editing a reference

You may need to edit a reference in your Mendeley library to ensure the information in the record is accurate, or to add additional details.

1. To begin editing a record, click on any of the references in your Mendeley library.
2. A panel will open at the right-hand side of the screen. This panel shows the full details of the reference separated out into different fields (such as author, year etc.). The type of reference (e.g. journal article, book etc.) is shown at the top of the record.
3. To change the type of reference, click the **change** link with the icon of the small pencil next to it. From the drop-down menu that appears you can select a different type of reference if you need to.
4. Now click on any of the existing information in one of the fields you would like to edit. As soon as you do this, the field will open allowing you to add or change any of the data. *Note:* As you fill in a record, Mendeley will often display a tip as to how you should enter data into that field so that it is interpreted correctly.
5. Once you click out of the field again, that updated data will be saved as part of the record.

Creating a Collection

Collections in Mendeley are like folders you can use to organise sets of references together to make them more convenient to find and access. For example, you could have all the references associated with a particular series of lectures grouped in one collection and all the references for a paper you are working on grouped in another. The same references can be added to multiple collections.

1. On the left of the Mendeley Reference Manager screen, look for the **Collections** section.
2. Under Collections, click on the **+Create collection**
3. Give your collection any name you choose and press **Enter** on your computer keyboard.
4. To move a reference into a collection you can -
 - a. Drag and drop a record from **All references** in your library onto the collection you want to add it too.
 - b. Click on the check boxes on the left of each reference you would like to move to a collection. On the bottom of the screen, a set of buttons will pop up allowing you to perform various functions with the selected references. Click the **Organize** button and then choose the **Add to Collection** options. Choose which collection(s) you want to add the references to and then click the button labelled **Add**.

Making your references available offline

If you want to be able to access and use your Mendeley library when you are offline, you can either choose specific collections to be available or make all references available offline.

- To make all references available offline – Click on the **All references** collection on the left-hand panel of Mendeley Reference Manager. Click the vertical pattern of three dots to the right of **All references**. From the menu that appears click the **Make Available Offline** option.
- To make an individual collection available offline – Follow the instructions for **All references** but just start by clicking on one of the collections you have created.

Accessing Mendeley Online

If you are using a computer, tablet, or smartphone where you do not have Mendeley Reference Manager Desktop installed, you can still access your full library of references and add new material by using a web browser.

1. Open your web browser.
2. Go to <https://www.mendeley.com>

3. Sign in to your Mendeley account.
4. Click on the **Library** link at the top right of the screen.
5. You will see your Mendeley library in your web browser. Note that the appearance and functionality of the online version of Mendeley is almost identical to the desktop version.

Adding Citations and Reference Lists to your documents

You can use the Mendeley Add-in in Microsoft Word to add citations and reference lists formatted in a wide variety of styles.

1. Firstly, make sure you have installed Mendeley Cite in Microsoft Word (see instructions above)
2. Open a document in Microsoft Word and click on the '**References**' tab in the ribbon and then click on the **Mendeley Cite**. Login to Mendeley cite if you are not already logged in.
3. Type a few words into the document and position your cursor where you would like a citation to appear.
4. Now go to the Mendeley Cite panel on the right of the screen.
5. Click on the **Citation Settings** tab.
6. Click the **Change citation style** button and choose one of the styles listed. Click the **Update citation style** button at the bottom of the Mendeley Cite panel.
7. Now switch back to the **References** tab.
8. Either search for or simply select one of the references already listed by clicking on the check box to the left of the reference.
9. Click the **Insert Citation** button at the bottom of the Mendeley Cite panel. An in-text citation in your selected style will appear in your document where your cursor is currently positioned. Using the steps above add a few more citations to other references to your text.
10. Now create a new line at the bottom of your document.
11. Go to the Mendeley Cite panel and click on the menu labelled with three dots ... from this menu choose the **Insert Bibliography** option. Click **Continue** to add your reference list.
12. A reference list formatted in your chosen style will appear at the bottom of your document.

Further help

Mendeley help guides: <https://www.mendeley.com/guides>

Mendeley Support Centre: <https://service.elsevier.com/app/home/supporthub/mendeley/>