

## Setting up and using a Mendeley Desktop account

**Mendeley Desktop** allows you to store and organise your research sources as well as creating in-text and reference lists in Word. It can save a lot of time when completing larger research projects.

Mendeley has an **online version** and a **desktop version**. Your online version can be accessed at any time from <https://www.mendeley.com/library> and will include the same references as your desktop account. However, you must use the Desktop version for full functionality.

**Please note that Mendeley is not a magic solution to referencing issues!**

**It is only as good as the data it receives - you must still check your references to ensure accuracy.**

Before launching Mendeley, **open and close Word** - this allows installation of the word plug-in.

To get started, register for an account.

### Step 1 - Register for a Mendeley account, download the software and choose a style

1. Go to: <https://www.mendeley.com/> and **Create account** using a **personal** email address. Fill in all the required details. **Do not use 'Sign in via your institution' as this only gives limited rights.**
2. A confirmation will be sent to the email address that you have registered with. Click on the link.

*If you already have an account, sign in using your account details at <https://www.mendeley.com/>.  
If you have an account but have forgotten your password it is easily retrieved via the Login links.*

3. Now download Mendeley Desktop, run the software and login:

<https://www.mendeley.com/reference-management/mendeley-desktop>

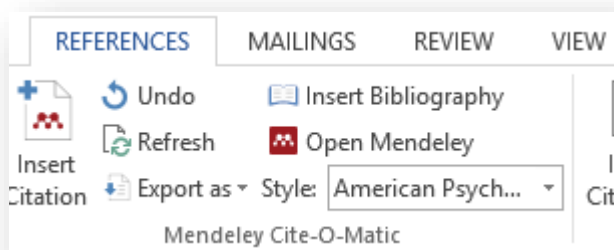
*If you are using a University PC or laptop, you will need to download Mendeley from Apps Anywhere. Find this icon on your computer start screen. Agree to the terms and conditions, search for Mendeley and Launch and Login. Once Mendeley is open, right click on the red M icon in your taskbar and pin it for easy future access.*

4. On opening the Mendeley screen, choose to **install the citation plugin for Word**.

**WHICH VERSION OF WORD?** *If you are using a newer version of Word, **2019** or **365**, you will need to choose the 'Get Mendeley Cite' option instead: <https://www.mendeley.com/guides/mendeley-cite>.*

*Both the Word plugin and Mendeley Cite options can be found under the Tools menu in Mendeley: check here if the initial screen does not provide the version you need.*

5. Open Word and go to the *References* tab – check that *Mendeley Cite-O-Matic* appears.
6. Close Word and go back to Mendeley (use the red M at the bottom of your screen).
7. Create a *folder(s)* using the options under *My Library* (on the left hand side) to organise your references.

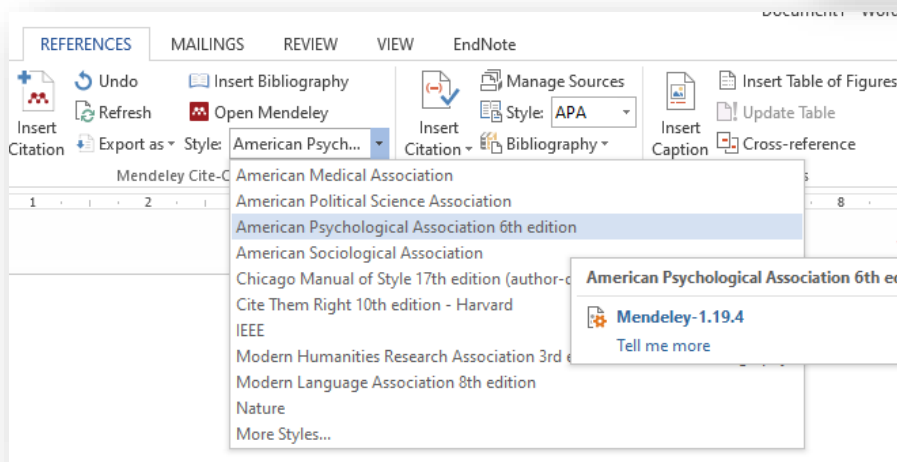
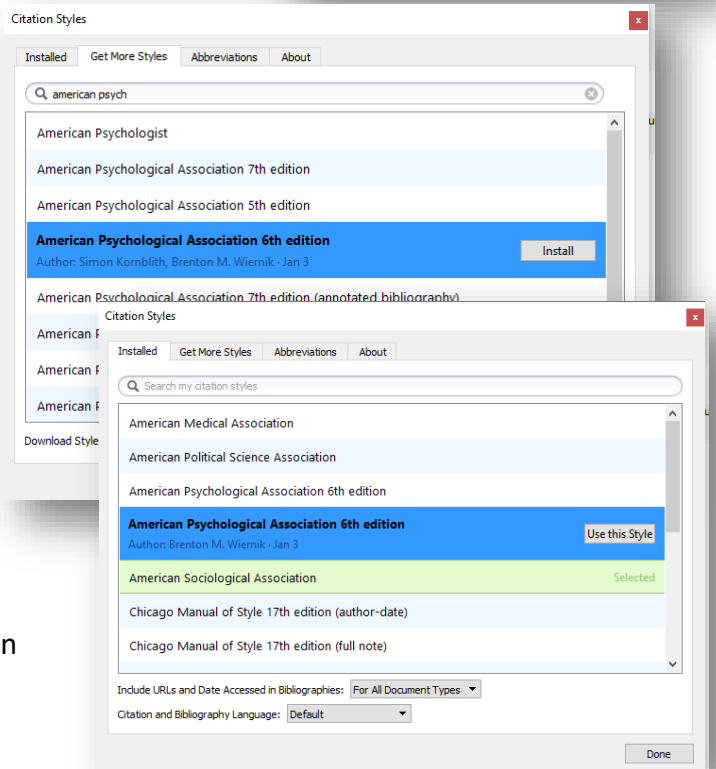
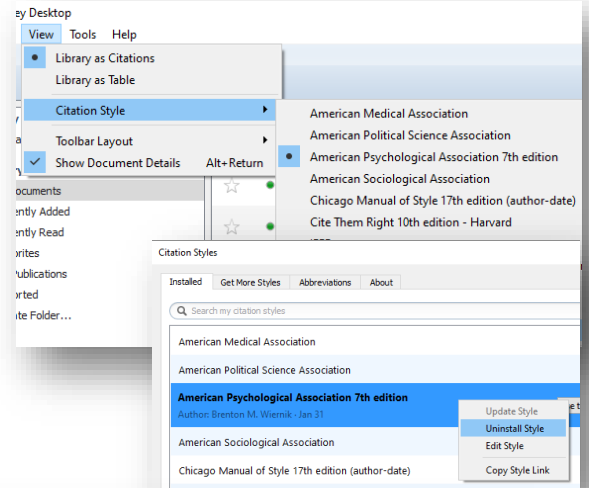


## Choose your Referencing Style

The latest version of Mendeley automatically uses **APA 7th edition** as the referencing style.

To change the **default style to an alternative**

- In Mendeley desktop select *View* and then *Citation Style* and then *More Styles*
- **Right click** on *American Psychological Association 7th edition* and choose *Uninstall style* and *Yes*
- Click *Get More Styles* and search for your alternative style
- Select the preferred style and *Install* and *Done*
- Go back into *View* and *Citation Style* and *More Styles* (see first screenshot on this page)
- You will now see your style in the **Installed** Styles Tab - select the style and *Use this Style* and *Done*. Your preferred style is now set as your default style.
- Open Word again and look in the *References* tab. Check that your default style is now selected in Mendeley Cite-O-Matic.



## Step 2 - Add references to your Mendeley account and edit

There are lots of ways to do this!

Find the strategy that works best for you.

**\*\*TIP:** if you can't see your records in Mendeley, use the **Sync** option to refresh your library

As you add references, remember to look at the record details screen for each item and check the options under *My Library* for your *Recently Added/All Documents* and additional folders.

### A. Drag and Drop downloaded PDF journal articles:

When you download a PDF from a database or another source, you can drag and drop this straight into your desktop account. You can also do this with any existing PDF files you have saved on your computer:

1. Select the files you want in *Windows Explorer* or your *Downloads folder* on your computer/laptop
2. Drag them over to your Mendeley desktop window by holding down the left mouse button
3. Let them go in the Mendeley desktop main Library window when you see *Copy* or *Add*
4. Mendeley will extract the details from the PDF and you can view the record in *Recently Added*
5. Click on the record to see the reference details – edit anything that needs changing by clicking into the fields (e.g. add or change date/volumes etc.) or if Mendeley indicates the reference details need reviewing, use the *Search* feature to find complete details and then click *Details are Correct*
6. Double-click on the record to open up the PDF, add notes/highlight etc.

**\*\*TIP:** Making sure your references are correct at this point will save you a lot of time!

View your references in APA format – click on *View* in Mendeley Desktop and select *Library as Citations*.

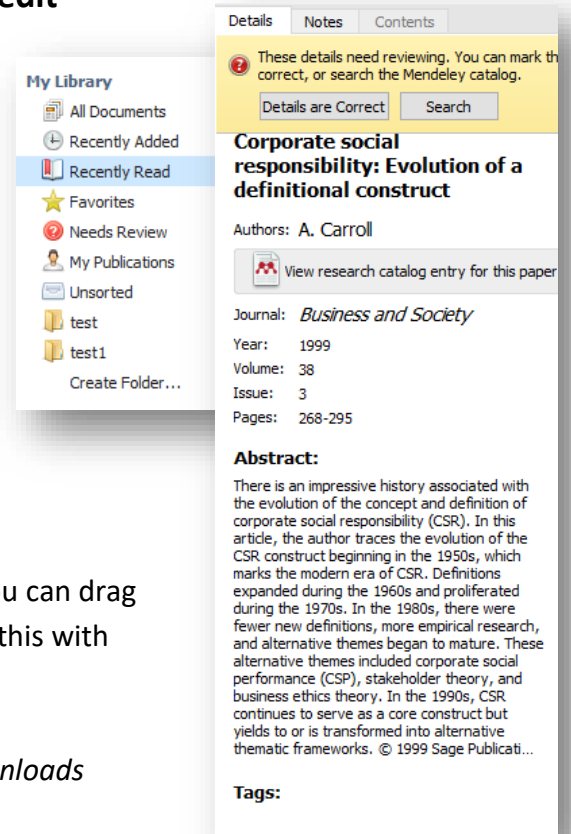
**\*\*TIP:** To help organise your records, you may also want to add your own *Tags* (use the record details screen) or drag and drop them into folders (such as the one you created in Step 1). The same reference can appear in multiple folders. There other ways to sort and find your references too: Mendeley has a good *All Documents* search feature and you can filter by author or star records in your list to add as *Favorites*.

### B. Add your existing Files/Folders and set up a Watch Folder

If you don't like drag/drop, use *Add Files* under the *File* tab to select PDFs from your computer/laptop.

You can also set up a *Watch Folder* if you want to always save PDFs to the same place.

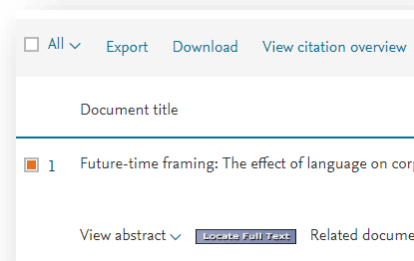
Mendeley will then automatically add any new PDFs in the Watch folder into your account (check *Recently Added*).



### C. Export records directly from SCOPUS

This is one of the easiest ways to get accurate reference details into Mendeley but it will not include the PDF of the full article! You will need to download and add this in separately or link through from the Record Details using the *View Research Catalog Entry for this Paper* (provided the University has a subscription).

1. Search for *Scopus* using the *library catalogue* and access this resource
2. Register for a personal account
3. Enter your search terms and refine your results as usual
4. On the results screen, select the records you want using the tick boxes and click *Export*
5. Choose *Mendeley* at the top of your results and *Export*
6. Open *Mendeley Desktop* and check the *Recently Added* area for your records. There will not be a PDF icon as there is no full text attached

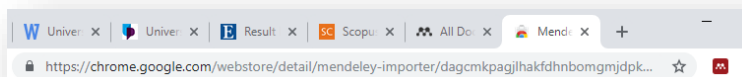


### D. Install and use the web importer (best for books/webpages)

The **Web Importer** tool allows you to scrape reference details from book records, papers, webpages and other documents and add these directly into Mendeley Desktop. **It can be very useful but it doesn't work with all website/library databases and you must check the accuracy of the details that are imported!**

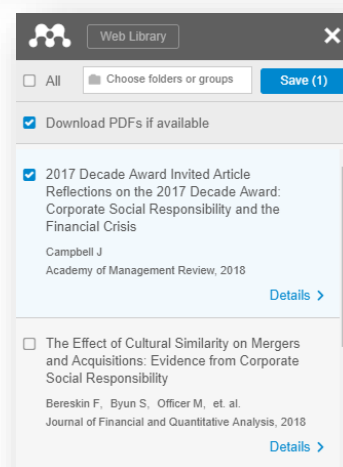
i) **Install the web importer** from Mendeley Desktop as follows:

1. Select the *Tools* menu and *Install Web Importer*. Choose the appropriate browser option and scroll down to follow the instructions (Chrome generally works best for library resources – *Install* and then *Add to Chrome* and *Add Extension*)
2. A small red Mendeley **M** will appear on your browser



ii) **Using the Web Importer tool**

1. Search for a record in the *Library Catalogue* or *Discovery*, or another resource of your choice (e.g. *Google Scholar* or a reliable website). For the *Library Catalogue*, make sure you are viewing the full book details.
2. Click on the **M** – a box will open up on the right of the screen. This will contain the bibliographic details associated with the books/articles or other sources you are trying to import.
3. **CHECK AND EDIT** the details to ensure they are as you would want them for *APA*. The importer tool will not always pick up the correct information! If it has added a URL for a book that is only in printed format, you will need to remove this. You may also need to add in or remove additional information. If there is no published date, leave this field blank as Mendeley will automatically add n.d. (no date) for you.
4. Save the record to your Library generally, or select a particular folder.
5. If a PDF is available for the record, the Web Importer will try and include it in your Library.



## E. Add records manually

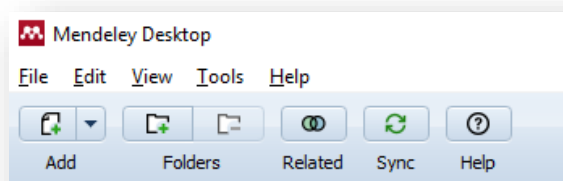
Some sources, such as information, data or reports from professional databases, cannot be added to Mendeley via any of the previous methods. For these, go to *File* and choose *Add Entry Manually*. Select the type of resource (e.g. report) and fill in the appropriate details and save the record.

## F. Add records via RIS

*(this method is also used for moving references between different reference management tools)*

Sometimes you may need to **import a RIS file** from a database into Mendeley. Only use this option if you want to download a large amount of results from a database (e.g. Discovery or Web of Science) or you can't drag/drop the PDFs. This is a 2 step process:

- i. **In the database:** select the records you want and look for an *Export* option. Choose *RIS format* and save the file.
- ii. **In Mendeley:** choose the *Import* option under the *File* menu and select *RIS*. Locate your saved *RIS* file and add the records to your Library.



## Step 3 – Organise your library

Once all your records are in place, as well as considering our tips above, have a look at the range of options Mendeley provides to organise your research and annotate your pdfs. These links provide more information:

<https://www.mendeley.com/guides/desktop/03-organizing-documents>  
<https://www.mendeley.com/guides/desktop/04-read-highlight-annotate>

## Step 4 – Create a reference list or bibliography without the Word plugin

*(see pages 5/6 for using the Word plugin)*

In Mendeley Desktop, simply select the records that you want to include, right click and use the *Copy As* option and *Formatted Citation*. Then open a Word document, right click and paste in your references.

**Please check and amend the records in Mendeley if there are any referencing errors!**

**You will also need to sort your references A-Z by author.**

## Step 5 – Access anywhere!

If you are away from your laptop/pc and you want to view your Mendeley library without downloading the desktop version, you can use Mendeley online: <https://www.mendeley.com/library/>. Simply drag/drop PDFs and check/edit your records as normal. **You must Sync your Desktop version when you next login!**

## Step 6 – Getting more help

More detailed support on using Mendeley Desktop can be found online:

<https://www.mendeley.com/guides/desktop>

**Online version of this handout: <https://tinyurl.com/uop-mendeley>**

## Step 4 – Using the Word Plugin to create in-text citations and reference lists

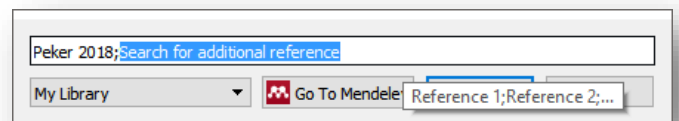
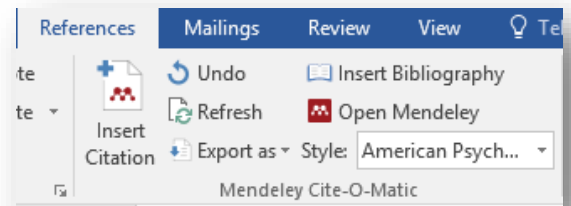
**REMEMBER:** if you are using a **newer version of Word, 2019 or 365**, you will need to choose the 'Get Mendeley Cite' option and learn how to use this: <https://www.mendeley.com/guides/mendeley-cite>

**For Word 2016 and older versions:** the **Mendeley Word citation plugin** allows you to produce in-text citations as you write and generates a reference list for all your citations at the end. It does this by pulling in and including your Mendeley records in your work as you type, in placeholder fields. These are shown as **grey** in Word and it is important that you don't edit or change these grey fields manually, all changes must be within Mendeley and pulled in to ensure everything works correctly.

For instructions on installing the Word plugin, please see page 1.

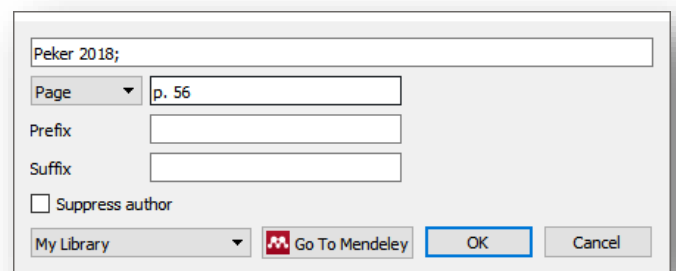
### In Word, to insert a citation:

1. Click on the *References* tab and ensure the Mendeley section is set to your preferred style.
2. Click in your sentence where you want your citation to be added.
3. Click on *Insert Citation* and search for the required reference.
4. Select the reference you want to add from the list. The author and date are now shown in the box (your in-text reference).



*If you want to add multiple citations in the same place, search again and repeat this step.*

5. If you want to make changes to your in-text reference, click on the author's name (e.g. you want to suppress the author as you many have already included this in your sentence or add a page number or additional information). Click OK when finished.
6. The in-text reference will now appear in your sentence in the correct format.



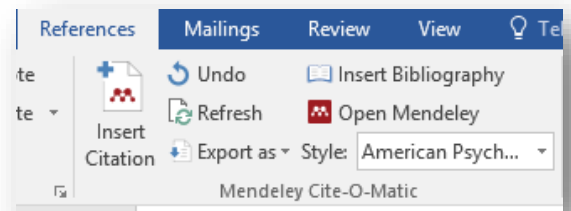
My example with a page number (Peker, Inandi, & Gilić, 2018, p. 56). My example where the author Pedersen (2015) is in my sentence. This is a standard reference (Porter & Kramer, 2006).

If you are unhappy with your in-text reference, click on it and choose *Edit Citation* from the References toolbar and make any changes. *Please note that if there are errors with how you have formatted your authors in your Mendeley records, these will be reflected in your in-text citations. You will need to change these in Mendeley and then use the Refresh button on the References toolbar to incorporate the changes into Word.*

**\*TIP: For corporate authors, enter these in full followed by , .**

## In Word, to insert a reference list:

1. Put the mouse cursor at the end of your work and type **References** on a new line
2. Hit *Enter* and then click *Insert Bibliography* in the Referencing toolbar
3. The references you have included in your sentences will now appear in A-Z order in a reference list.



### References

Pedersen, E. R. (2015). *Corporate social responsibility*. London: SAGE.

Peker, S., Inandi, Y., & Giliç, F. (2018). The Relationship between Leadership Styles (Autocratic and Democratic) of School Administrators and the Mobbing Teachers Suffer. *European Journal of Contemporary Education*, 7(1), 150–164. Retrieved from <http://search.ebscohost.com/login.aspx?direct=true&db=eric&AN=EJ1172917&site=eds-live>

Porter, M. E., Kramer, M. R., & Fraser, D. (2009). Strategy and Society: The Link Between Competitive Advantage and Corporate Social Responsibility. *Harvard Business Review*, 84(12), 77–92. <https://doi.org/10.1108/sd.2007.05623ead.006>

4. Check your references carefully against APA guidelines (see below).

*If there are errors, change these in Mendeley and then use the **Refresh** button in the Word Referencing toolbar to bring the changes into your document.*

## Additional support for the Word Plugin

For more help using the Citation Plugin please see: <https://www.mendeley.com/guides/using-citation-editor> and the Mendeley Support Center: <https://service.elsevier.com/app/home/supporthub/mendeley/>

For any technical problems installing the plugin, please contact Information Services on +44 (0)23 9284 7777 or email: [servicedesk@port.ac.uk](mailto:servicedesk@port.ac.uk)

**Mendeley Cite Support** (alternative to the Word Plugin for newer version of Word)

Help guide is at: <https://www.mendeley.com/guides/mendeley-cite>

## Referencing Help and Support

University of Portsmouth APA reference guidance can be found at <https://library.port.ac.uk/referencing>

General referencing queries can be directed to the Library's 24/7 help service: <https://library.port.ac.uk/help/>