



Mendeley

# Mendeley Reference Manager

A guide for new users

March 2020

ELSEVIER

# Simplify your research workflow

Considerable time and effort can be spent building and organizing your reference library, finding your references and notes when you need them and formatting citations correctly. The new Mendeley Reference Manager helps simplify these tasks, leaving you time to focus on achieving your goals.

This guide shows you how to:

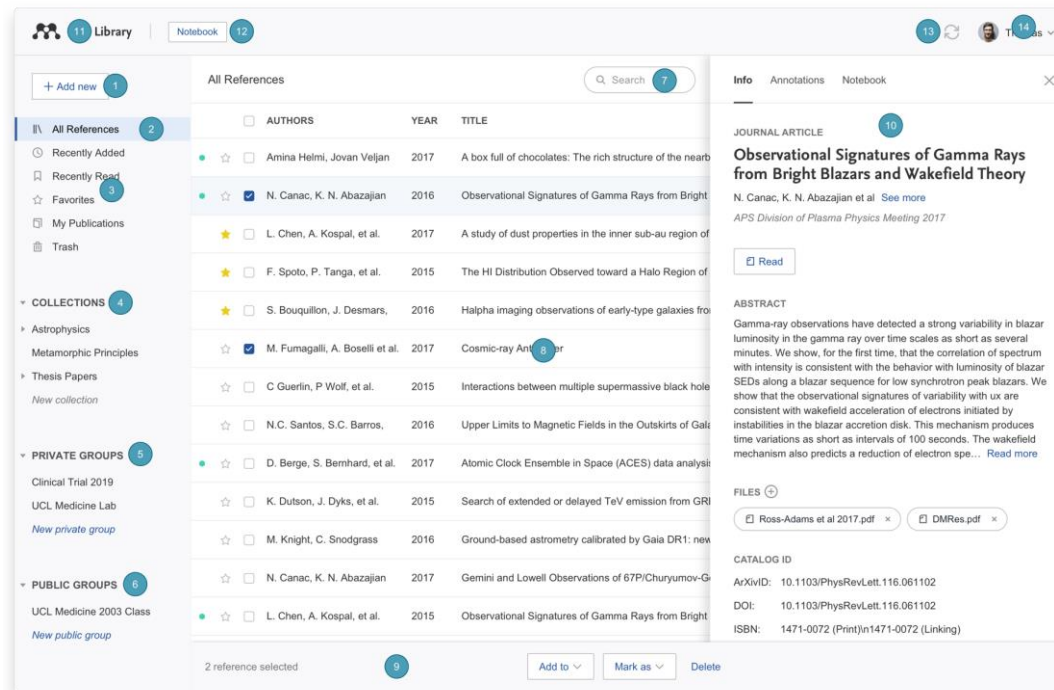
1. [Navigate Mendeley Reference Manager](#)
2. [Build your Mendeley library](#)
3. [Insert citations into your Microsoft® Word document](#)
4. [Access your Mendeley library anywhere](#)
5. [Organize and find references in your Mendeley library](#)
6. [Highlight and annotate PDFs](#)
7. [Keep your highlights in one place](#)
8. [Share references with other researchers](#)

## Get started

- > Download Mendeley Reference Manager desktop at [mendeley.com/download-reference-manager](https://mendeley.com/download-reference-manager)
- > Access Mendeley Reference Manager online at [mendeley.com/reference-manager](https://mendeley.com/reference-manager)



# Navigate Mendeley Reference Manager



1. **Add new** - Add new references to your library
2. **All References** - Return to your library
3. **Smart Collections** - Mendeley Reference Manager automatically organizes aspects of your library into smart collections
4. **Custom Collections** - Keep your references organized in custom collections
5. **Private Groups** - The private groups you have created or joined
6. **Public Groups** - The public groups you have created or joined
7. **Search** - Search your library
8. **Library table** - All of the references in your selected collection or group
9. **Action panel** - Select the check box next to a reference in the library table to bring up the action panel
10. **Info panel** - Select a reference in the library table to view the metadata in the info panel
11. **Library** - Return to the main library view
12. **Notebook** - Keep all your thoughts in one place
13. **Sync** - Mendeley Reference Manager automatically syncs any changes you make to the cloud
14. **Profile** - Access your online profile page, access support or sign out of your account

> Find out more about your Mendeley library in our [Help Guides](#)



# Build your Mendeley library

The collage illustrates four methods for building a Mendeley library:

- A:** The main 'All References' interface showing a list of imported entries with columns for Authors, Year, Title, Source, and Added.
- B:** The 'Add new' dropdown menu, which includes options for adding files from the computer, importing from a library, and other sources.
- C:** The 'Add entry manually' dialog, which allows users to enter a DOI, select a reference type (e.g., Journal Article), and provide title and author information.
- D:** The 'Web Importer' dialog, which automatically detects and imports references from a web page.

Build a library to keep all your references in one place, where you can easily organize and find them.

To get started with your Mendeley library, import references using a variety of methods:

- Drag and drop PDFs from your computer**  
Mendeley automatically captures author, title and publisher information.
- Import files from your computer**
  - Select and add locally stored references.
  - Import locally stored RIS, BibTeX or EndNote XML files.
- Manually create an entry**  
If you enter the DOI into the appropriate field Mendeley automatically looks up the details for you.
- Import content from the Internet using Mendeley Web Importer**  
Get Mendeley Web Importer from the [Chrome Web Store](#) or the [Firefox Add-Ons Store](#)

Mendeley Web Importer detects article identifiers on the page you are viewing and automatically retrieves metadata and PDF full texts (where available) for you to add to your library.

> Find out more about adding references to your Mendeley library in our [Help Guides](#)

# Insert citations into your Microsoft® Word document

Add citations and bibliographies to a Microsoft Word document you're writing.

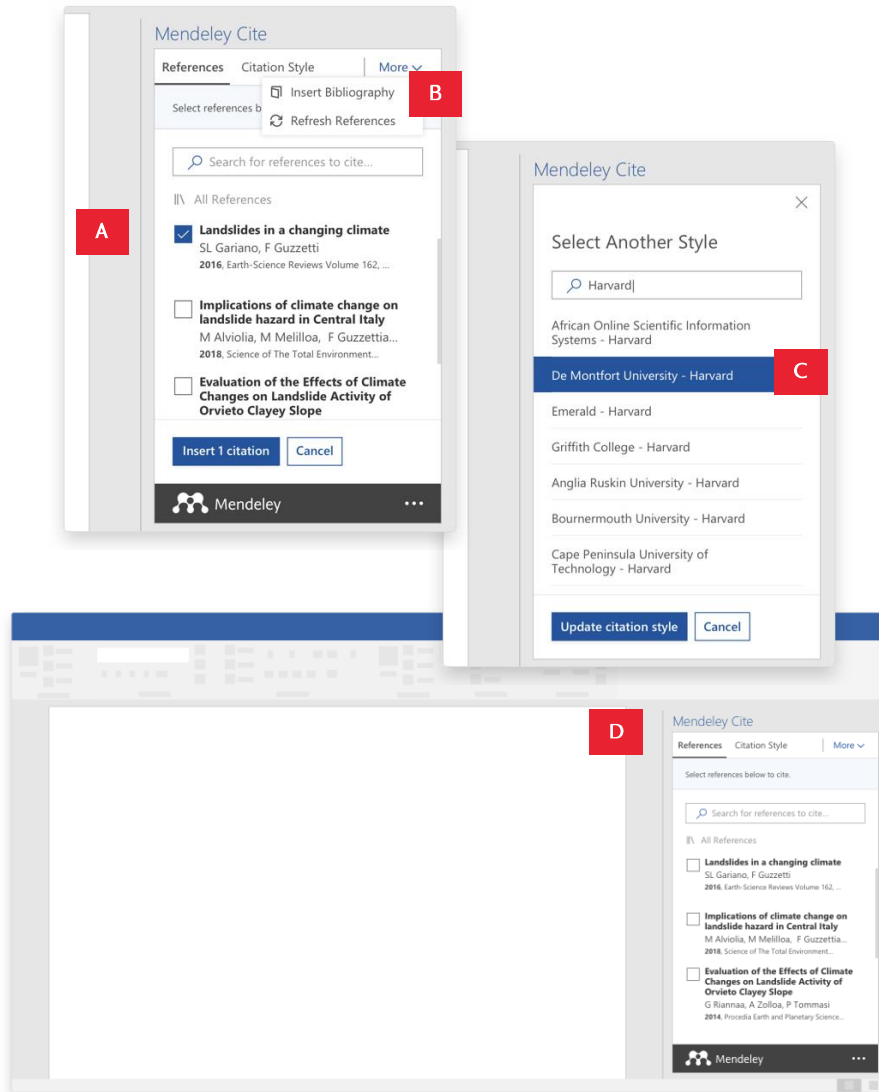
Use the Mendeley Cite add-in for Microsoft Word to generate citations and bibliographies in just a few clicks:

- A. Find and insert individual or multiple references into your document**  
Search for references in your Mendeley library and insert them into your document with a single click. You can do this for individual or multiple references.
- B. Generate a bibliography**  
Generate a bibliography from the references you've cited.
- C. Choose your preferred citation style**  
Select from thousands of different citation styles. Search and select your preferred style to automatically update your references and bibliography.
- D. Cite seamlessly**  
Have your Mendeley library and Microsoft Word document open side by side. You can also use Mendeley Cite without Mendeley Reference Manager being open or even installed.

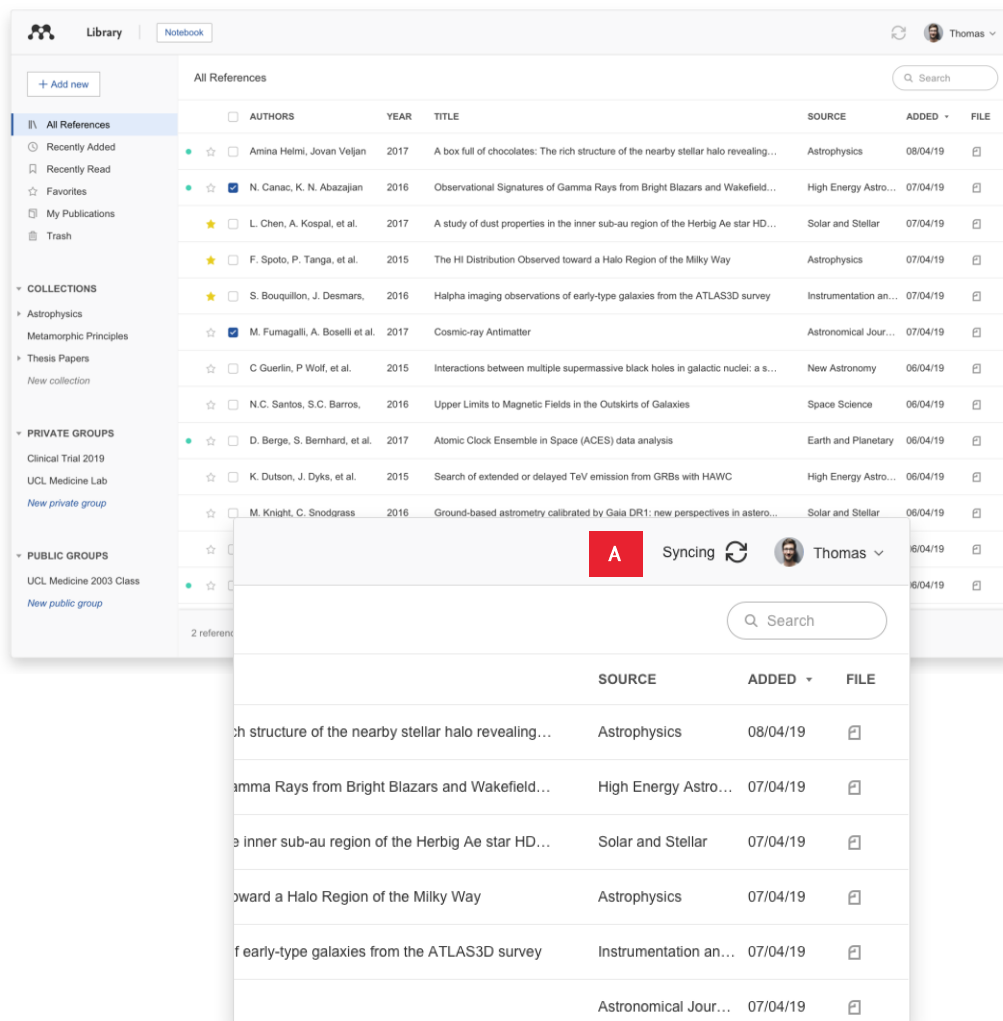
Mendeley Cite is compatible with Microsoft Word 2016 or above, Microsoft Online, Microsoft Office 365 and the Microsoft Word app for iPad®.

Get Mendeley Cite BETA at [mendeley.com/cite/word/install](https://mendeley.com/cite/word/install)

> Find out more about using Mendeley Cite in our [Help Guides](#)



# Access your Mendeley library anywhere



Continue your research work whenever you need, wherever you are.

You can securely access documents in your Mendeley library using the desktop application or any Internet browser. The two versions are identical in look and functionality, and real-time sync automatically saves any changes:

## A. Know you're up to date

Your library automatically syncs with its backup in the cloud whenever you add references or make changes, seamlessly keeping everything up to date. This means you see the same library through the desktop and [online version](#) of Mendeley.

> Find out more about syncing in our [Help Guides](#)

# Organize and find references in your Mendeley library

The screenshot shows the Mendeley Library interface. On the left is a sidebar with navigation options: 'All References', 'Recently Added', 'Recently Read', 'Favorites', 'My Publications', 'Trash', 'COLLECTIONS' (with sub-items like 'Astrophysics', 'Metamorphic Principles', 'Thesis Papers'), 'PRIVATE GROUPS', and 'PUBLIC GROUPS'. A red box labeled 'A' points to the 'New collection' link under the 'COLLECTIONS' section. The main area displays a table of 'All References' with columns for 'AUTHORS', 'YEAR', 'TITLE', 'SOURCE', 'ADDED', and 'FILE'. A red box labeled 'B' points to the search bar at the top right of this table.

AUTHORS	YEAR	TITLE	SOURCE	ADDED	FILE
Amina Helmi, Jovan Veljan	2017	A box full of chocolates: The rich structure of the nearby stellar halo revealing...	Astrophysics	08/04/19	
N. Canac, K. N. Abazajian	2016	Observational Signatures of Gamma Rays from Bright Blazars and Wakefield...	High Energy Astro...	07/04/19	
L. Chen, A. Kospal, et al.	2017	A study of dust properties in the inner sub-au region of the Herbig Ae star HD...	Solar and Stellar	07/04/19	
F. Spoto, P. Tanga, et al.	2015	The HI Distribution Observed toward a Halo Region of the Milky Way	Astrophysics	07/04/19	
S. Bouquillon, J. Desmars,	2016	Halp imaging observations of early-type galaxies from the ATLAS3D survey	Instrumentation an...	07/04/19	
M. Fumagalli, A. Boselli et al.	2017	Cosmic-ray Antimatter	Astronomical Jour...	07/04/19	
C Guerlin, P Wolf, et al.	2015	Interactions between multiple supermassive black holes in galactic nuclei: a s...	New Astronomy	06/04/19	
N.C. Santos, S.C. Barros,	2016	Upper Limits to Magnetic Fields in the Outskirts of Galaxies	Space Science	06/04/19	
D. Berge, S. Bernhard, et al.	2017	Atomic Clock Ensemble in Space (ACES) data analysis	Earth and Planetary	06/04/19	
K. Dutson, J. Dyks, et al.	2015	Search of extended or delayed TeV emission from GRBs with HAWC	High Energy Astro...	06/04/19	

Keep your library organized and quickly find the references you need.

Save time when looking for references by organizing them into Collections and using the search tool in your Mendeley library:

## A. Organize your references

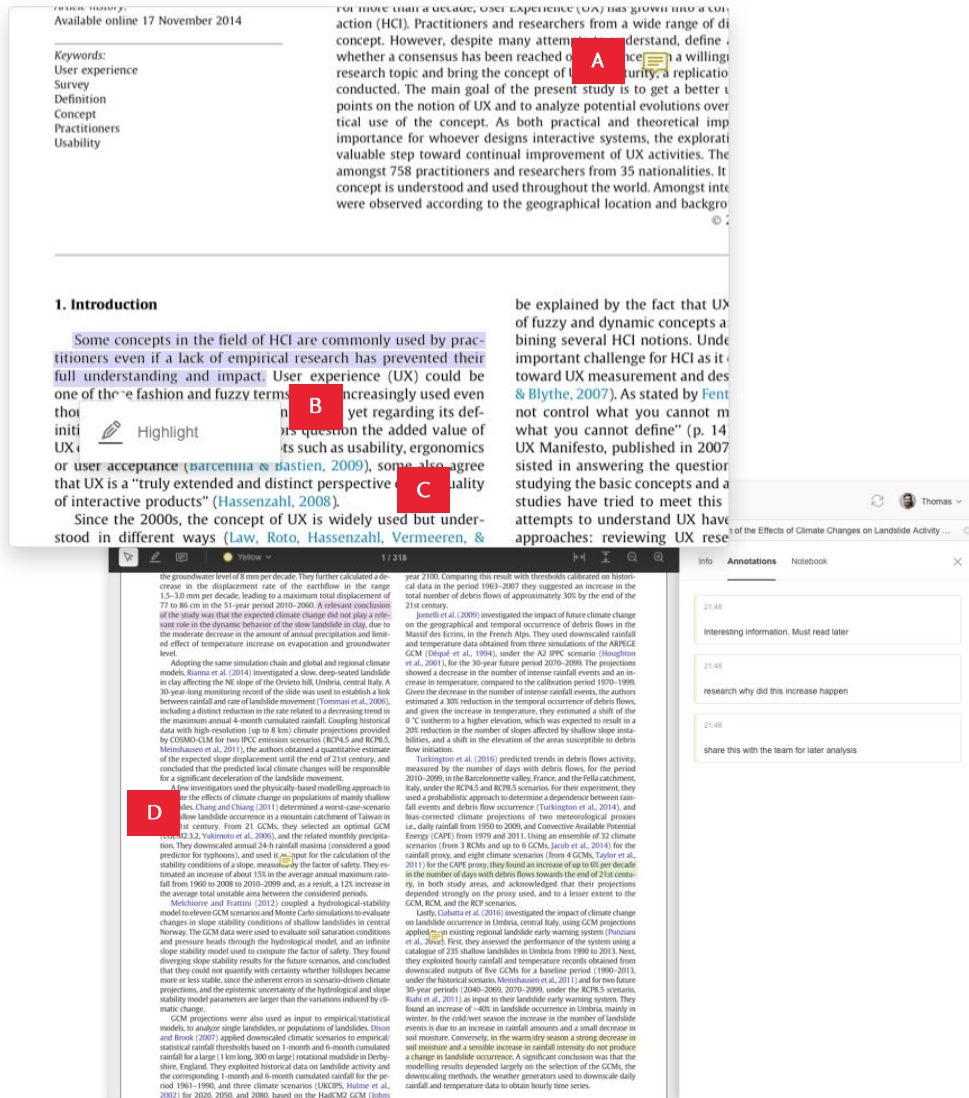
Use Mendeley's smart collections or create your own custom collections of references to keep your research interests separate.

## B. Search your references

Enter a search term into the search field and Mendeley will return the appropriate results. Mendeley searches by author, title, year and source.

> Find out more about searching and organizing your references in our [Help Guides](#)

# Highlight and annotate PDFs



Capture your thoughts on the PDFs you're reading.

Quickly and easily add highlights and annotations to PDFs using Mendeley's annotation tools:

## A. Annotate PDFs

Record your thoughts as you read PDFs by creating a sticky note.

## B. Highlight text

Highlight key pieces of text so you can find them later. Differentiate your highlights with different colors.

## C. Work on multiple PDFs

Have multiple PDFs open at once and easily switch between them thanks to Mendeley's multi-tab format.

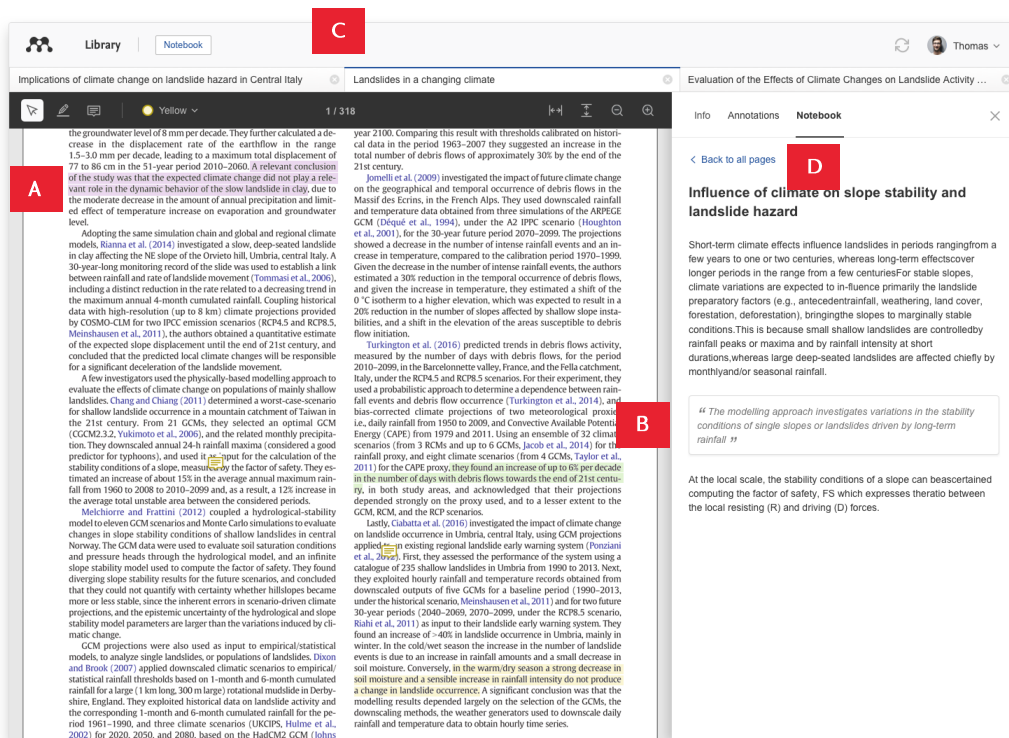
## D. Pick up where you left off

Mendeley remembers where you reach in a document and opens your PDFs in the same location on all devices.

> Find out more about annotating your PDFs in our [Help Guides](#)



# Keep your highlights in one place



Collect together all the highlights and comments you make across multiple PDFs.

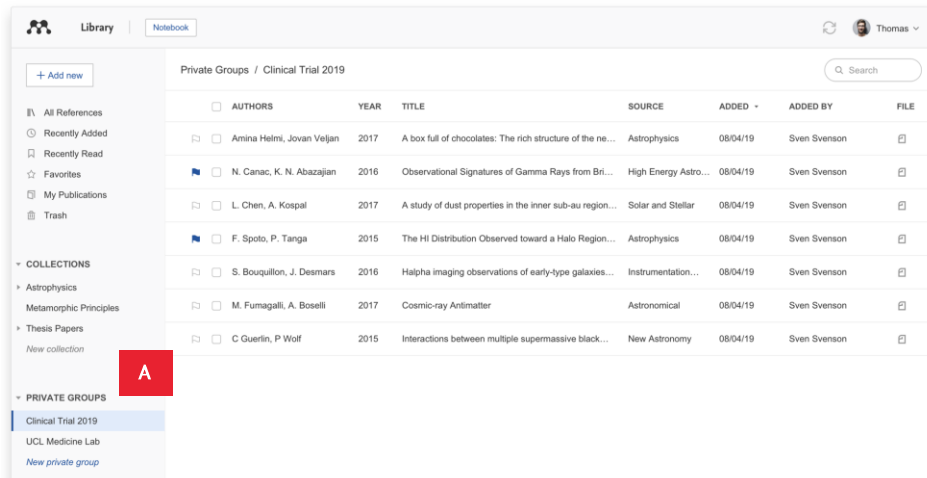
You can keep your thoughts in one place using your Mendeley Notebook:

- A. Have all your highlights in one place  
Add any highlighted text from a PDF to your Notebook in just one click.
- B. Refer back to the original PDF  
Navigate back to the source of any highlight by selecting it in your Notebook.
- C. Work across papers  
Keep the same Notebook page in view while switching between PDFs.
- D. Create multiple Notebook pages  
Make as many Notebook pages as you need - the Notebook page you have open will stay open as you view different PDFs.

> Find out more about your Mendeley Notebook in our [Help Guides](#)



# Share references with other researchers



Collaborate with others by sharing references and new ideas within Groups.

Access your Public and Private Groups in Mendeley Reference Manager:

## A. Private Groups

Share documents and references with small teams. You have to be invited to these groups and they allow you to share PDFs and collaborate using shared annotations.

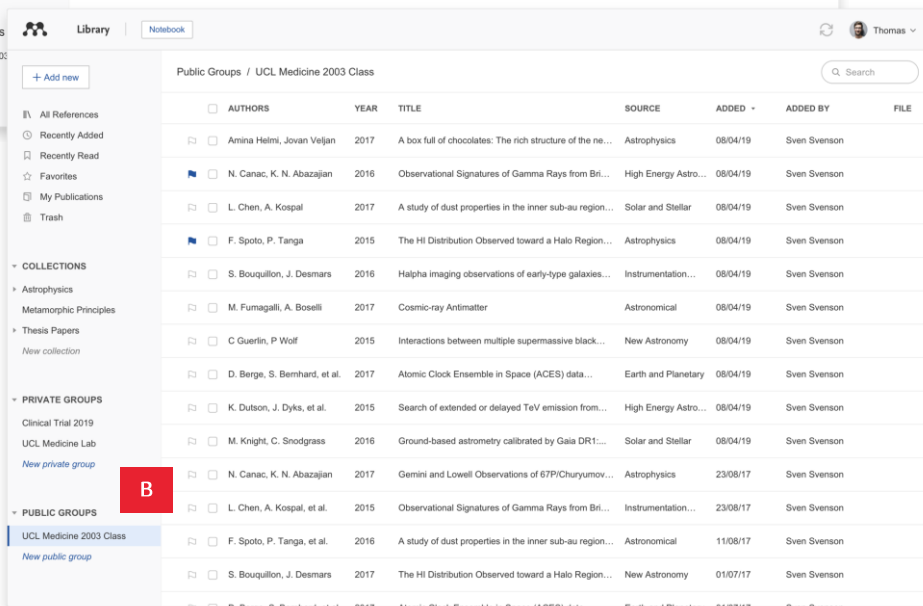
## B. Public Groups

There are two types of public groups in Mendeley Reference Manager: open public groups and invite-only public groups.

Open public groups can be joined by anyone with a Mendeley account, whereas you must be invited to join an invite-only group.

Both public group types can be used to share references with other members of the group. Neither allow the sharing of PDFs.

> Find out more about sharing references in our [Help Guides](#)



# Next steps

- > Download Mendeley Reference Manager desktop at [mendeley.com/download-reference-manager](https://mendeley.com/download-reference-manager)
- > Access Mendeley Reference Manager online at [mendeley.com/reference-manager](https://mendeley.com/reference-manager)

## Need more help?

Visit the Mendeley Support Hub at [service.elsevier.com/app/home/supporthub/mendeley](https://service.elsevier.com/app/home/supporthub/mendeley) to find a range of FAQs on using Mendeley's reference management solutions. Alternatively, you can contact us through any of these channels:



[Email](#)



[Chat](#)



[Mendeley  
Support Twitter](#)



[Facebook](#)

## Stay in touch

Hear about the latest news and updates from Mendeley by following us at any of these channels:



[Team  
Mendeley  
Twitter](#)



[Facebook](#)



[LinkedIn](#)



[Mendeley Blog](#)

Watch this space!

To ensure Mendeley Reference Manager always supports your workflow as effectively as possible we will be releasing new features and improved functionality every two weeks. Find out about the most recent releases at [mendeley.com/release-notes-reference-manager](https://mendeley.com/release-notes-reference-manager).



ELSEVIER

