

Instructions for using Mendeley Reference Management Software

The purpose of this document is to provide a basic resource for members of the CNH-Lakes team who wish to use Mendeley, and to ensure consistency of use among members. Prepared on January 2, 2018 by Reilly Henson.

What is Mendeley?

Mendeley is a free reference management software that allows users to save, organize, and share information about academic publications (including title, author, journal, and even full text). It also allows quick and easy creation of bibliographies from these saved publications, which can be adapted to a variety of citation styles.

Why are we using it?

By all using the same reference management platform, we can easily share references and bibliographies with each other. This will be particularly helpful when collaboratively writing articles and reviewing literature. We have selected Mendeley specifically because it was already in use by several team members; it is highly functional and easy to use.

Where can I find Mendeley and its associated resources?

Visit <https://www.mendeley.com/>. This website allows you to read more about Mendeley, view help documents, download the software, and access your account information.

How do I get started?

1. If you've never used Mendeley before, you'll need to visit <https://www.mendeley.com/> and click "Create Account."
2. Once you've finished making your account, you can click the "Download" button to download and install the desktop version of the software (this is helpful, but not mandatory – you can actually use Mendeley exclusively from the web at <https://www.mendeley.com/library/>).
3. The last step is to install the browser extension (a.k.a. plugin) – this is the easiest way to save publications to Mendeley straight from the web. Once you're at <https://www.mendeley.com/library/>, you should see the option to install a Web Importer Plugin. All you need to do is click "Install now," and follow the instructions.

How do I use Mendeley?

Joining a Groups

Groups allow you to share your references with other team members. Our group is called "CNH-Lakes." You should have received an email inviting you to join this group. If not, please contact Reilly at vrhenson@vt.edu. Simply follow the instructions in the email to become a part of CNH-Lakes.

Using folders within a Group

Once you're part of the CNH-Lakes group, you'll be able to see all the folders that team members have already created. These folders appear on the menu along the left side of the screen, under the heading, "Groups," beneath the CNH-Lakes group. A given folder may contain all the references used in a certain paper that we've written, all the references we've come across for a given topic, or any other grouping of references that may be relevant.

If you want to save a reference to an existing folder, follow the instructions in the *Saving references* section below.

However, if you want to save a reference that doesn't match any of the existing folders, you can create a new folder within the CNH-Lakes group. To do so, simply:

1. Find the "Groups" section on the menu that appears on the left side of the screen.
2. Right click on the group "CNH-Lakes."
3. Select the option that says "New Folder."
4. Choose a name for the folder that other team members will be able to easily understand.

Now you can save references to that folder, as described in the *Saving references* section below.

IMPORTANT: If you create a folder within the CNH-Lakes group, it will automatically be shared with other team members. But if you create a folder under "My Library," only you will be able to see it. Please double-check that you're creating a folder in the right place!

Saving references

Once you know what folder you want to put your reference in, there are two ways to save that reference into Mendeley: using the browser extension, and adding a file from your computer.

To use the browser extension:

1. Find a webpage that describes the article or publication. Typically, this is a site like JSTOR, ScienceDirect, or an academic journal's online portal. For instance, a webpage like this: <https://www.sciencedirect.com/science/article/pii/S0022169409003588>
2. Click the Mendeley browser extension, which appears at the top of your browser window, and looks like the Mendeley logo.
3. A box will appear that contains all the information that Mendeley was able to pull from that webpage. If the site was very detailed, the box may already contain the article's title, authors, pages, journal, issue, and so on. It may even include a full-text PDF of the article, if you have access to that journal.
4. However, there are cases when Mendeley cannot pull much information from a website. When this is the case, and most fields in the box are empty, you can either enter the information yourself, or try to find the article on a different website.

5. Once you're satisfied with the information in the pop-up box, click the uppermost text field, and enter the name of the folder you'd like to save the reference in. After a few letters, Mendeley should auto-suggest folders for you to choose. Select the appropriate folder.
6. Click the save button.

To add a file from your computer:

1. First, make sure you have selected the folder you want the file to be saved into. You should be able to see the contents of this folder in the large, central field.
2. If you have a PDF version of an article saved on your computer, you can add it directly into Mendeley.
 - a. If you're using the web version, look for the button that says "Add" in the top left corner. Click it, then select "Import document."
 - b. If you're using the desktop version, look for the button above the word "Add" in the top left corner. Click it, then select "Add files."
3. Choose the file you would like to save into Mendeley.
4. Once you've selected the file and it appears in the folder, you can review the saved entry to ensure it has all the details correct. In many cases, Mendeley will automatically read the title, authors, date, and other information from a PDF. If not, you can enter this manually.

IMPORTANT: For both these methods, please make sure you are saving into a folder, and not just saving directly to the group CNH-Lakes. Keeping everything in folders will help ensure no entries get lost or accidentally deleted!

Rarely, you may wish to save a publication that has no associated website or document. You can save such a publication into Mendeley by clicking "Add," then selecting "Add entry manually" (or "New manual entry," in the online version). This will allow you to type in each of the necessary fields, like title, author, and date.

If you have questions about how to use Mendeley, please refer to this website:

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

If you have questions about Mendeley practices that are specific to this project, please contact Reilly Henson at vrhenson@vt.edu