Citation Management with Mendeley

FAQs

- **What is Mendeley?**
  Mendeley is a citation management and professional collaboration software that is free to download.
- **Where can I find more information on how to use Mendeley?**
  There is a guide on using citation management software on the Marine Resources Library website. Visit mrl.cofc.edu, click Guide and search BIOL 700, then go to Citation Management Software.

Getting Started

1) Create an account from their website (www.mendeley.com)
2) Download Mendeley **web importer** and **citation plug-in**

Overview

Users can view and organize their citations within the Mendeley **Desktop App**. Documents can be downloaded directly to the app or uploaded so that all materials associated with a citation are found in one place. The **web importer** serves as a link between online search engines and the desktop app. Citations located online can quickly added to the desktop app through the web importer. The **citation plug-in** is incorporated into Microsoft Word and allows users to quickly insert any citation directly from their Mendeley library. Using the citation plug-in will ensure all citations are included in the bibliography that Mendeley will create with the touch of a button.

Desktop App Basics

- The Desktop App is where all citations are stored. Documents affiliated with each citation can be saved with the citation for easy access. Documents can either be imported using the web importer or through manual upload.
- 3 ways to organize your citations: folders, tags, and notes
  - The folder system is similar to a tag system where sources can be affiliated with multiple folders.
- Can create groups of up to 3 collaborators. These groups can have a shared folder where all group members can view and add citations to the folder for the rest of the group to access.
- Contains an integrative PDF viewer. Text can be highlighted and notes can be added directly to the document.
- For those documents that must be manually imported, it is suggested to create a folder on OneDrive (or another system with an automatic back-up) where all documents can be saved.

Web Importer Basics

- The Web Importer is found by the search engine of your internet browser.
- When a citation is found online is to be added to Mendeley, click the web importer icon; Mendeley will locate all citation on that page and import those selected to the desktop app.

Citation Plug-In Basics

- The Citation Plug-In can be found under References in Microsoft Word.
- Use the Insert Citation command to insert any citation in the paper; Mendeley will track the citations used to create the bibliography.
- Citations can be searched through the plug-in or users can go through the desktop app to find the appropriate citation.
- Citations are dynamic; if an error is noticed, change the information in the desktop app (not in Microsoft Word). After the desktop app has been updated, refresh Microsoft Word and any changes made in the app will be reflected in Word.

The Process

1. Locate the citation you wish to add to your Mendeley library.
2. Click the web importer icon to upload the citation to the cloud.
3. Open the desktop app and sync it to the cloud. The new citation should now be added to your desktop library.
4. Within the desktop app, click on the citation and evaluate it for accuracy. (Note that articles found from Google Scholar tend to be less accurate than citations found on a publisher's website or other academic site.) If something appears incorrect, click "Search" and see if that solves the problem. If not, changes can be made manually.
5. Once you are ready to write, open Microsoft Word. Select your citation style and begin writing. (Note that Mendeley often has errors when using numeric citation styles.)
6. When you are ready to add a parenthetical citation, add the citation through the Mendeley citation plug-in.
7. When you are done writing, use the citation plug-in to insert your bibliography.
8. Check your bibliography to ensure accuracy. If you notice an error, do not change it in Microsoft Word; go back to the citation in Mendeley and change it there. Then refresh your Word document and Mendeley will automatically update any changes that were made in the desktop app.
9. Once you are satisfied with your writing, citations, and bibliography, export the document without Mendeley fields; this will remove all dynamic text. If changes need to be made, always make changes to the dynamic document rather than the plain text document so that citations and the bibliography can be updated by Mendeley if needed.

If you have further questions on how to use Mendeley or other citation management software, please contact the EVSS office.