MENDELEY

Mendeley Manual
for Librarians

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Using this manual

This manual was written to be used by Librarians, Academic Liaisons and others enrolled in the Mendeley Certification Program for Librarians. New users of Mendeley may consult this document throughout the certification program as required.

This manual is intended to provide an overview of Mendeley's features, but should not be regarded as exhaustive. For more detailed guides, visit the Mendeley Resource Center.

Additional resources can also be found on this page of Elsevier.com.

You are free to reproduce sections of this document when providing guidance on using Mendeley.

If you have any questions, please contact certificationprogram@mendeley.com.

Overview

Mendeley is a free* reference manager and academic social network. It helps researchers to organize their materials, to collaborate with others online, to discover the latest research in their field and find career opportunities.

Mendeley has over 6.5 million users worldwide. Although its user interface is currently only available in English, its intuitive layout and usability make it popular with researchers everywhere.

Mendeley provides an online account (see Accounts) that allows a user to build a personal library of references. References can be added to this library by using papers in PDF format, by importing from online catalogs or by manually adding the details of a reference. Users can also easily migrate their references to Mendeley from other reference managers.

By adding references to a library, users are able to keep track of their materials, to organize them as they see fit and read & annotate PDF documents. The Mendeley Citation Plugin then allows users to insert citations using references in their library, setting them out according to specific style rules (choosing from over 7,000 available citation styles). Once a manuscript has been completed, the Citation Plugin will also generate a full bibliography at the click of a button.

Libraries are stored in the cloud, meaning they are accessible from any location with an Internet connection. Users can download the Mendeley Desktop application (available for Windows, OSX and Linux), the mobile applications (iOS and Android) or access a web-based view of their library from any browser.

In addition to reference management, Mendeley provides features to allow researchers to collaborate together. By creating and joining groups, users can share resources and ideas with one another directly. Mendeley's other social features allow users to create a personal profile, connect with other researchers and to discover important new work in their field as well as understand the impact of publications.

Mendeley is owned by Elsevier, but is committed to offering a publisher-neutral service. Papers from any journal or publication can be used with Mendeley, and Mendeley also supports importing and exporting library content from a number of widely used formats. Users of other Elsevier products – such as Science Direct and Scopus – will benefit from certain integrations and enhancements.

Our commitment to responsible sharing

Mendeley expands the range of services available to researchers for academic collaboration and publication sharing. Our joint key principle is that sharing should be done in ways that are responsible, sustainable and don't undermine the ability of publishers to deliver the high-quality research articles that scholars wish to share in the first place. Mendeley:

- Promote responsible sharing.
- Endorse and adhere to the industry's 'Voluntary Principles for Article Sharing on Scholarly Collaboration Networks'†.
- Actively monitor copyright infringement.
- Work closely with other publishers and research information providers to ensure that we are compliant at all policy levels.
- Provide researchers and libraries with clear guidance on posting and copyright policies.

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* Mendeley offers a 'freemium' model. Accounts are free to create and use, but certain limits apply to the amount of storage these accounts have available, as well as the ability to create private groups. See below for more details.

† For further details please visit http://mnd.ly/29xHAkx

Accounts

Creating an account

Creating a Mendeley account is very straightforward and only takes a few seconds.

Visit www.mendeley.com and follow the 'Create a free account' link to be taken to the registration tool. You just need to provide a few basic details about yourself, including an email address. Although any email address will work, it's best to use an institutional email address (i.e. one provided by your school or university) as this helps Mendeley to verify your association with the institution. Researchers who register with their institutional email address will also automatically benefit from certain benefits if the institution purchases or has already purchased a Mendeley Institutional Edition (MIE) subscription.

Once you've created a Mendeley account, you'll be prompted to verify your email address. It's important to complete this step in order to allow you to recover your account in the event that you forget your password.

If your email address has already been used to create an account for another Elsevier product (such as Science Direct or Scopus) you will be prompted to log into this account. Using the same account across Elsevier products provides an enhanced experience.

Account limits

A free Mendeley account allows users to the vast majority of Mendeley's features, although there are some limitations in place. A free account receives:

- 2GB personal cloud storage
- The ability to create 5 restricted group (private/invite-only) of up to 25 members
- 100MB team cloud storage

Mendeley offers the ability to purchase upgrades to these restrictions by purchasing a Personal Storage Plan. These 'premium packages' are usually purchased by independent research teams or companies.

An institution with a Mendeley Institutional Edition subscription (see below) receives premium account upgrades for all its users (authorized using institutional email addresses). As part of the Mendeley Librarian Certification Program's Level 3 reward, certified librarians are given 500 premium account upgrades[‡] to distribute amongst users at their institution. These premium accounts will last 12 months and benefit from the following allowances:

	Librarian Certification Program	Mendeley Institutional Edition
Seats	500	Unlimited
Personal storage	5GB	5GB
Shared storage	20GB	20GB
# Private groups	Unlimited	Unlimited
# Collaborators per group	Up to 50	Up to 100

[‡] Limited to 1 librarian per institution, although multiple librarians can contribute to the level 3 assessment.

Using Mendeley's Reference Management Features

Once a Mendeley account has been created, you're ready to start using Mendeley's applications to build a personal reference library.

Your Mendeley library is stored in the cloud, meaning it can be accessed from different applications, running on different devices, in different locations. Changes made during different sessions need to be 'synced' across devices to ensure that the most current version is available on each.

Mendeley applications

These applications are designed for use in different circumstances, and you should familiarize yourself with the strengths of each:

- **Mendeley Desktop** – This is Mendeley is its original and most commonly used form. The vast majority of Mendeley users use the Desktop version on a regular basis. This is a desktop application, which needs to be downloaded and installed. Mendeley Desktop is compatible with Windows, OSX and Linux.
    - **Advantages**:
        - Allows all Mendeley features, including importing, reading, annotation, organization, searching, collaboration via groups and discovery.
        - Compatible with Mendeley Citation Plugin – to use Mendeley's write & cite functionality Mendeley Desktop **must** be installed.
        - Provides access to different citation styles – including the ability to install new styles from a repository of over 7,000 options.
    - **Restrictions**:
        - Must be installed on computer, and best used on a personal laptop or desktop. Library computers may sometimes prevent installation of software.
- **Mendeley Mobile** – Dedicated apps are available for iPhone, iPad and Android. These apps can be installed on phones and other devices (such as tablets). The Mobile applications are designed to be more useful for reading and annotation on the go or in situations where portable devices are preferred (such as in a laboratory).
    - **Advantages**:
        - Allows importing, reading, annotation, organization, searching, collaboration via groups, discover via Mendeley Suggest and provides basic article's readership metrics.
        - Improved reading and annotation experience on smaller devices.
        - Allows user to control which files are downloaded, preventing excessive data consumption on non-wifi connections.
    - **Restrictions**:
        - Does not allow writing and citing.
- **Mendeley Web Library** – The Web Library allows you to access your Mendeley library from any modern web browser. It provides a similar user interface to Mendeley Desktop.
    - **Advantages**:
        - Allows importing, reading, annotation, organization, searching and (limited) collaboration via groups.
        - Designed for quick access reading and annotation.
        - Can be used on any computer with an Internet connection – removing the need to install software.
    - **Restrictions**:
        - Citing while writing although possible is not as straightforward as it is on Mendeley Desktop.
- **Social Features** – Mendeley's social features allow users to build an online profile to promote themselves and their work, as well as connecting with other users. A number of new features have been recently released to improve this experience.
    - **Profiles** – A basic Mendeley profile is generated at the time of account creation, but extra information can be added to reflect career activity and interests. An active

Mendeley account also makes it easy for other users to connect with you and reach out via private message, or via discussion in Mendeley groups. Mendeley integrates with ORCID, the Open Research Contribution ID non-profit, to bring unique research identification to Mendeley Profiles.

o **Groups** – Groups are Mendeley's main collaborative feature. A user is able to create and join teams of people in order to share references and other resources. Groups are usually dedicated to a specific objective or may also be subject-specific.

o **Suggest** – Available at www.mendeley.com/suggest/. Previously a premium-only feature, Suggest was made available to all Mendeley users at the start of 2016. It uses information about your profile, library and reading habits to generate bespoke recommendations.

o **Stats** – Available at www.mendeley.com/stats/. Allows published authors to connect their Scopus Author Profile to their Mendeley profile, revealing usage statistics about papers.

See the section below on using Mendeley's social features for more details.

Mendeley Desktop

Overview

Mendeley Desktop is still the 'core' Mendeley experience, and is the most commonly used Mendeley application. Because it is required to use the writing and citing features provided by the Citation Plugin, it tends to be very popular with those users who are doing a lot of paper writing.
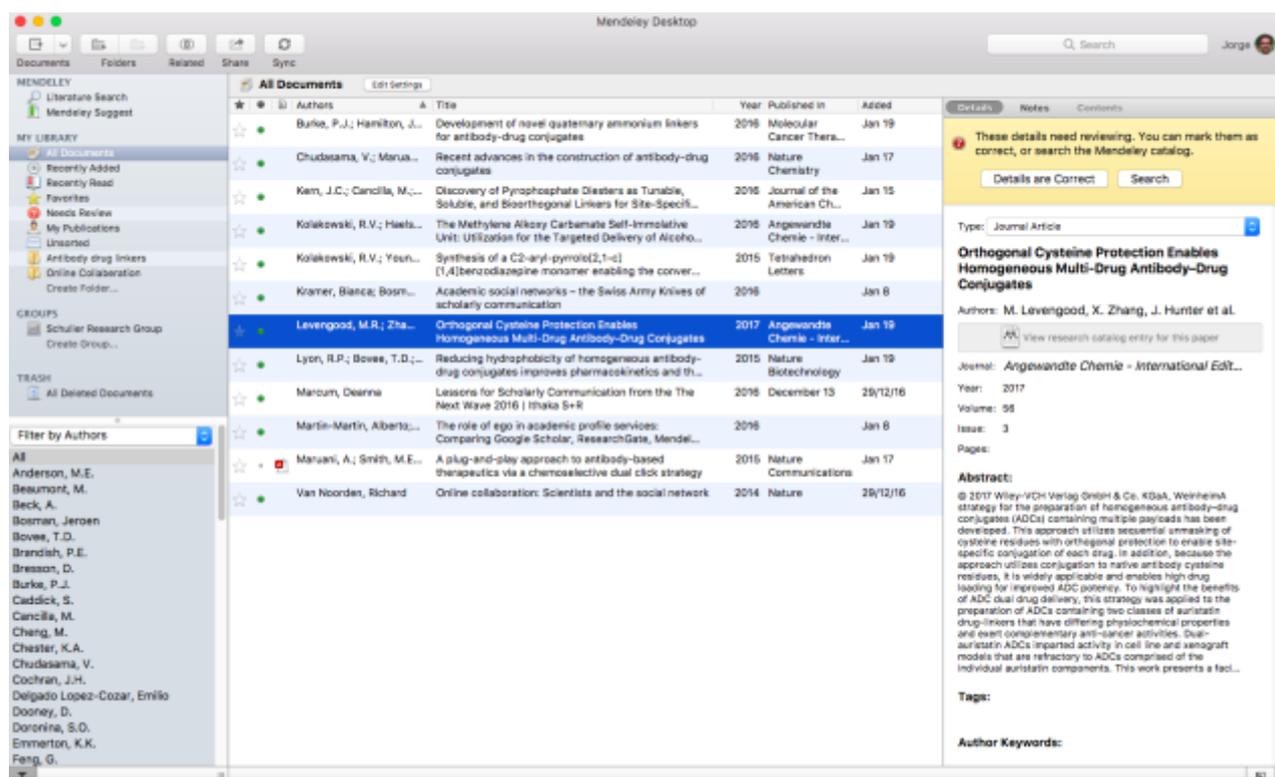
Layout

Broadly speaking, Mendeley Desktop offers a three-column view. The left-most column allows 'high level' navigation, with a number of different view filters available from the time of installation. Users can also create custom filters for their documents – 'folders' – which will also be listed in this column.

The main column provides a list of references, along with details of each entry. These details – such as a paper's title, author and year of publication - are displayed in columns within the main panel. When using a view filter- selected in the left-hand column (e.g. Recently Added) - only the relevant documents

will be displayed in the main panel. Selecting 'All Documents' will always display the entire contents of a library.

The right-hand column displays all the details of the currently selected reference. This column should be used to ensure that a reference's details have been entered correctly. Clicking on a field allows existing details to be modified or missing details to be added.

Adding references

Building a Mendeley library requires adding references. There are several ways to get references into your library using Mendeley Desktop (detailed in this section), but it's also recommended that users install the Mendeley Web Importer, which is covered below.

- The simplest way to add a file (such as a PDF of a paper) to Mendeley is to drag and drop it into the main window. This will cause Mendeley to automatically create a new entry for the paper.

  [TIP - METADATA EXTRACTION: When adding a PDF paper to Mendeley, Mendeley will attempt to extract the metadata (such as Author, Title etc.) from the paper to use for the document details. Although this is undertaken using sophisticated algorithms, the sheer variety of formatting options for papers means that this can never be 100% accurate. **Always check the details of a newly added paper to verify the details Mendeley finds.]**

- Single files can also be added using the 'Add Files' command, found under the File menu. This will allow you to browse your computer for a specific file and add it to your library.
- The entire contents of a folder (e.g. multiple PDFs stored in the same location) can be added using the 'Add Folder' found under the File menu.
- You can opt to 'Watch' a folder using the 'Watch Folder' command found under the File menu. This allows you to specify a folder on your computer for Mendeley to monitor. Whenever a new file is added to this folder, it will be automatically imported into Mendeley.
- For references, other than PDF papers, it's possible to create a 'metadata only' entry in your library. This can be useful for books and other non-digital (or non-text) media. To create a manual entry, select the 'Add Entry Manually' command, found under the File menu. This opens a tool that allows you to specify the reference type, and to input the document details yourself.

Storage

Reference and PDF papers added to your personal library are stored in the cloud, which allows them to be retrieved whenever and wherever you need them. Files stored in your library count towards a storage limit which is applied your account. The amount of storage depends on your account type. You can check your storage usage at any time via the 'General' tab of the Preferences menu.
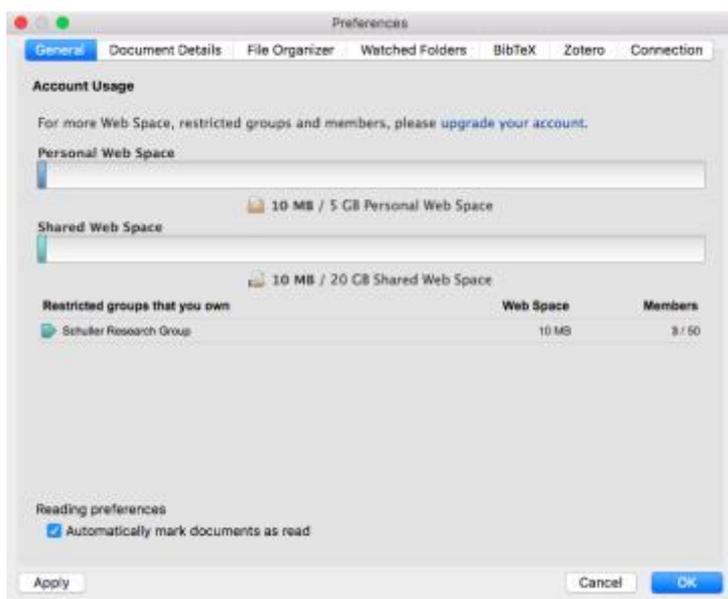
The Mendeley Web Catalog

Mendeley takes all references added by users and adds them to the Mendeley Web Catalog. Sophisticated algorithms analyze each entry, allowing the system to identify where multiple users have added the same paper and to identify the correct details for that document.
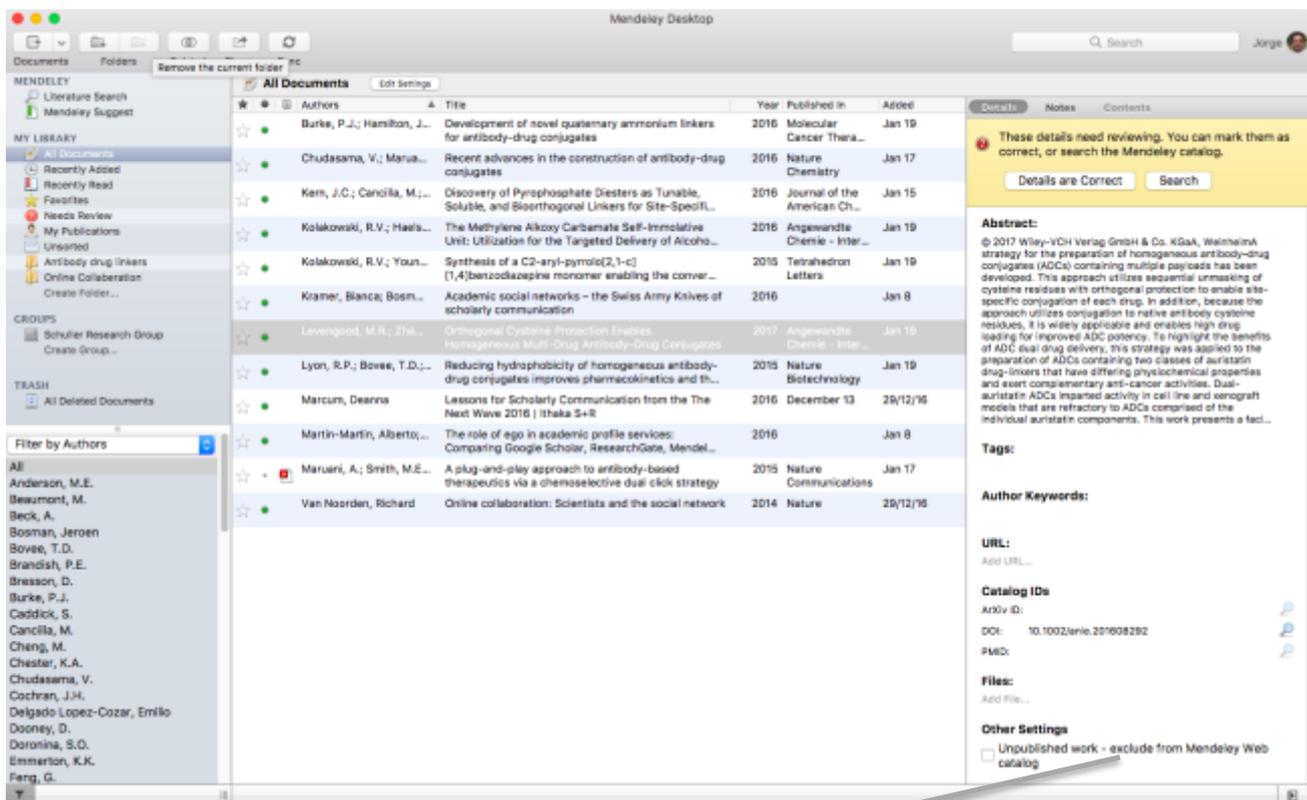
For example, if three users all add the same paper with identical document details, the Catalog will be fairly confident that those details reflect the correct details of the paper.

If three users add the same paper, but one user includes a typo in the title of the paper, the correct title is more likely to be taken due to the weight of numbers. Papers imported from a respected source – such as Science Direct – are also regarded as more trustworthy.

Opting out of the Web Catalog

The Web Catalog is used to identify patterns in research and to power recommendations. No user data is shared with the Catalog, so it's not possible to see the contents of an individual library. However, it is possible to opt out individual references that may be particularly sensitive.

This can be done by checking the 'Unpublished work – exclude from Mendeley Web Catalog' setting which appears at the bottom of the document details column.

Other Settings

☐ Unpublished work – exclude from Mendeley Web catalog

Importing references

Mendeley Desktop can also import existing references from other reference managers. Currently this includes the following:

- Endnote
- Zotero
- Refworks
- Any other reference manager that can export to .ris or BibTeX formats

To import an output file from another reference manager, open the File menu of Mendeley Desktop and open the 'Import' menu. Select the appropriate file type from the list, locate the file on your computer and press 'Ok' to start the import process.

Importing references from online catalogs

Many online catalogs offer the ability to export a reference or multiple references to a Mendeley library.

Several, such as Science Direct and Scopus, offer direct integration. With a reference selected, open the 'Export' menu and use the 'Save to Mendeley' option. If you aren't already logged into your Mendeley account, you'll be prompted to do so. Once the export is completed the various references will be available in your Mendeley library after the next sync.

Other catalogs that allow exporting references to the .ris format will also work with Mendeley. Save the .ris file to your computer and then add it to Mendeley using 'File' > 'Add File'. Mendeley will create entries for all references included in the export file.

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Mendeley can also import BibTeX and Endnote-compatible xml.

Syncing

After making **any** changes to your library it's very important to 'sync' Mendeley. This ensures that the changes you have made are pushed up to the cloud for storage. By saving your changes in the cloud, these amendments will be available when you next access your library, whether it's from the same computer or from a totally different device.
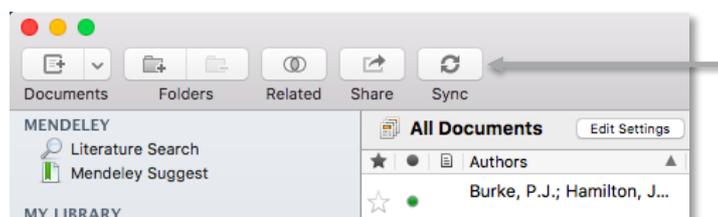
Mendeley will automatically sync each time it's opened (in order to check for changes made elsewhere), but you can initiate a sync at any time by using the button on the main toolbar.

Always remember to sync frequently when making changes to your library.

Organizing references

Mendeley offers a number of different options to help organize a personal library:

- **Ordering** – At any time you can reorder the list of references in the central column by clicking the various column headings. This can be useful when you need to order by Author, Title or Year, for example.
- **Folders** – Folders allow a user to filter their view. They are created using the 'Create Folder' option that appears in the left-hand column – or by using the button on the toolbar. Subfolders can be created within a parent folder, to allow greater precision when filing.
  References are added to a folder by dragging and dropping them into the appropriate entry in the left-hand column. When a folder is selected, the main panel of Mendeley Desktop will only display references that have been added to the selected folder. References can be added to multiple folders. Rather than thinking of them as a way to store your references, it's better to regard folders as a way of quickly filtering your library view.
- **Tags** – Tags allow a user to very quickly label a specific reference with a keyword for easy retrieval.
  Tags are added to a reference using the document details panel, with multiple tags being separated by semicolons (';'). Once added, they will appear in the Filter tool, which appears in the bottom left panel of Mendeley Desktop.
  Clicking on a tag that appears in the 'Filter by tag' list will only display references with that specific tag.

  [TIP - CONTEXT SPECIFIC FILTERING: When using tags – and also search – Mendeley will filter the view on top of any current filtering. If you're viewing a particular folder (i.e. a filtered view), selecting a tag from the Filter tool will apply the new filter on top. You will also only be able to select from tags that are used on references within that folder.

  For example: You're looking for a particular paper, which you know applies to the treatment of lung cancer. You have a folder, which contains all papers relating to lung cancer, so you select that in the left-hand menu. The list of available tags in the Filter tool is now substantially reduced, since you're no longer viewing All Documents. You then select the 'Treatment' tag within the Filter tool. This returns only items that are in the lung cancer folder and also have the 'Treatment' tag, allowing you to rapidly cut down the number of items you need to check through.**]**

- **Recently Added** – This left-hand column option will display the references that you've most recently added to your library.
- **Recently Read** – This left-hand column option only applies to PDF files added to your library. It will display a list of the PDF files you've recently opened for reading on any Mendeley application – and will also take you back to wherever you had reached in the paper when you reopen the file.
- **Favorites** – At any time you are able to 'star' a reference by clicking on the star that appears next to its entry in your Mendeley library. This will mark the item as a 'Favorite' and add it to the Favorites option in the left-hand column.
- **Needs Review** – This left-hand column option will list any items which Mendeley has imported, but has reason to suggest that the document details need review. This may be because the metadata extraction process has struggled with some elements. Once a reference has been marked as having been reviewed by the user, it will be removed from this list.
- **My Publications** – This folder is used for adding your own personally authored publications to Mendeley. By adding a paper using this tool, you are asserting that you are one of the listed authors. The paper will be added to your Mendeley profile, allowing others to see your authorship.
- **Unsorted** – This folder is used to store documents which have not been added to any collections in your library.

Search

Mendeley Desktop includes a powerful search function, which allows you to quickly find items in your library.

To begin a search, just enter a keyword in the box that appears in the top right corner of the Mendeley Desktop Interface. Matching results will be returned in the central panel.

Mendeley will not only match items which contain the keyword in their document details, but will also return PDF files that contain the keyword within them.

[TIP - CONTEXT SPECIFIC SEARCH: Note that like the filtering options discussed above, Mendeley's search tool is content-specific. If you're viewing a particular folder and initiate a search, Mendeley will initially only search within the selected folder.

This can allow you to rapidly narrow the number of items being searched, but if you want to search your entire library, make sure 'All Documents' is selected in the left-hand column.**]**

In addition to a quick search, you can also opt to search particular elements of the document details by clicking the dropdown arrow that appears next to the magnifying glass when the search field is active. This provides you with the following search options (which can also be entered manually):

- **Authors:**
- **Titles:**
- **Publication Names:**
- **Year:**
- **Notes:**

To clear a search and return to the full view, click the 'Clear' button, which appears on the yellow notification bar that displays after a search is made. Alternatively, deleting the contents of the search field will also cancel a search.

The PDF Reader
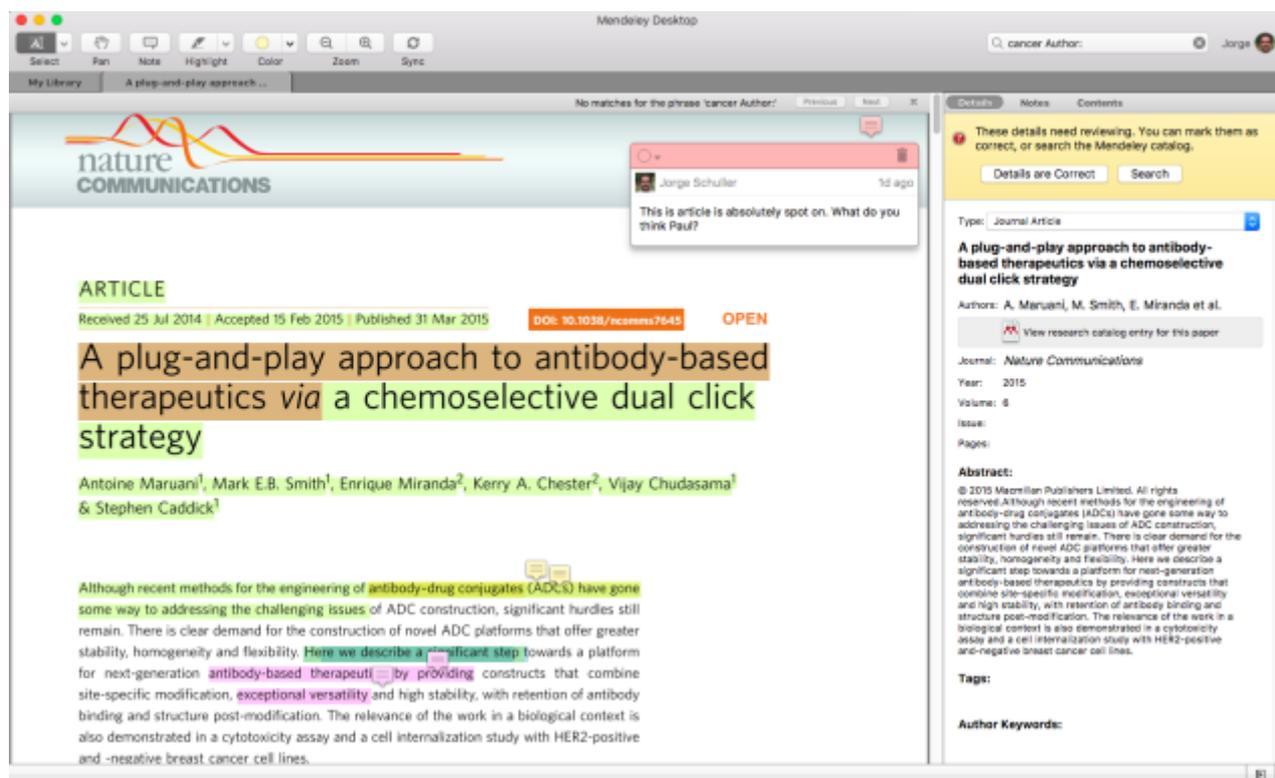
PDF papers that have been added to Mendeley (indicated by a small PDF icon appearing next to the author name) can be opened for reading using the Mendeley PDF Reader. The PDF Reader provides many similar features to other PDF software, but with several extra features that enhance the reading and note taking experience.

To open a PDF for reading, double click on an entry that includes a PDF icon. Open papers will each appear as a tab below the main toolbar, allowing you to switch between multiple papers. 'My Library' will also appear as a separate tab, allowing you to switch back to the library view at any time.

When you close a paper, Mendeley will remember your position within the document and take you back to the same location when you next open the paper.

In addition to the main reading panel, you will also see the document details panel displayed. This allows you to verify the details of the document you're reading, and to make amendments as necessary. The additional tabs allow you to access your notes (covered in more detail below), and the document contents for quick navigation. Note that the contents tab is only available in papers that have had this information included by the publisher.

The PDF toolbar allows you to change the page view as you see fit, by using the rotate, zoom and full-screen commands.

Annotation

In addition to reading the paper, Mendeley also allows you to collect your thoughts in the form of annotations. These can be added in several ways:

- **Highlighting** – Select the highlight tool from the toolbar to allow you to highlight relevant passages. You can switch between cursor highlighting, and dragging a rectangle to apply highlighting to the selected area.
  Clicking on a highlighted passage will focus the reader on that section, making the highlighted passage easier to read. To exit this mode, click outside the highlighted area.
  To delete highlighting, right click it and select 'Remove Highlight'. Note that this is not available when the reader is focused on a highlighted passage.
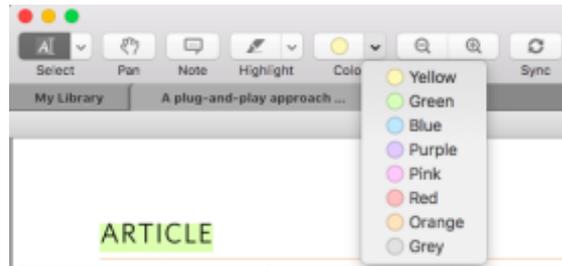
- **Sticky Notes** – Select this tool and click a location to apply a Sticky Note to the text. Alternatively, you can right click in the appropriate position and select 'Add Note'. Sticky Notes allow you to add a comment or in a specific location within the text. The note will be time-stamped to help you keep track of your thoughts.
  Sticky notes will also be added to the Notes tab of the document details panel. These entries are also linked to the relevant Sticky Note - clicking them will take you to the position of that note within the text.
  These notes cannot be searched using the search tool.
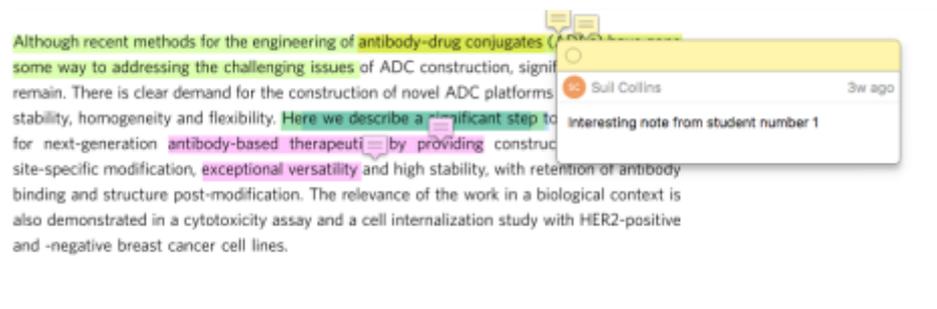
- **Document-wide notes** – Found in the Notes tab of the document details panel, this field allows you to make general notes about a paper.
  These notes can also be accessed from the main library view, which allows them to be applied to both PDF papers and metadata only references.
  These notes can be searched using the search tool.

Exporting annotations

Highlighting and annotation applied to a PDF document are not added to the original PDF you may have used when importing the reference.

You can export a copy of the PDF with your annotations included by opening the 'File' menu and selecting the 'Export PDF with Annotations…' option.

This will allow you to save a separate copy of the PDF, complete with highlights you've added. The locations of sticky notes will be indicated by icons, with the contents of the notes listed on an appended page.

Collaboration

Mendeley's main collaborative feature is groups. Groups are user-created collections of resources that are made available to other Mendeley users. For more advanced group functionalities check Groups in Mendeley Web

There are three different types of Mendeley groups:

- **Open** – This type of Group is totally public and can be joined by anyone. It will appear in the list of groups available on Mendeley.com. Public groups allow discussion and the sharing of references, but only the reference metadata can be shared.
  Any group member can add, modify and delete references shared with the group. Others can 'follow' the group to see the references added to it.
  Open groups are a good way to share large numbers of references with others, as well as inviting others to share references in return.

- **Invite-only** – This type of Group is also publicly visible and can be found using the group search tool. However, it limits the membership to those invited to join by the group owner (or by an appointed administrator). Others can 'follow' the group to see the references added to it, but only full members can add, modify or remove references. As it is a public group, only reference metadata can be shared.
  Invite-only groups are 'restricted' groups and the size of their membership is limited when created by free accounts.
  Invite-only groups are a good way to share fixed lists of references with a wide group. They are often used for reading lists.

- **Private** – Private groups are totally private. They cannot be found using the group search tool – members need to be invited to join.
  Private groups are the only group type which allow the sharing of full-text papers. In addition, notes and annotations added by group members are also visible to other members, allowing specific passages to be pointed out, and suggestions to be made. Each contributor receives their own unique color to identify their input.
  Private groups are intended for research teams or project groups to collaborate on texts, shared on a fair-use basis. As such, membership of private groups is strictly limited – they are also treated as 'restricted'.

Any Mendeley user can create groups – although some restrictions do apply. Groups are used to share references, notes and to host discussion.

Creating a group

Creating a group in Mendeley Desktop can be easily done in just a few steps:

1. Under the 'Groups' heading in the left-hand column, click the 'Create Group' command.
2. When the tool opens, you'll be asked to provide some basic details about your group, including its name and a description.
3. You'll also need to select a Group Type. See above for details of each type.
4. Once you've provided the details of your group, it will be created immediately. You can begin inviting people to join it using their email addresses, or – if you already follow them on Mendeley – they will be suggested when you start typing their name.

You can find a more detailed guide to Groups in the Mendeley Resource Center.

You can also find a dedicated guide to Private Groups in the Mendeley Resource Center.

Once a Group has been created, it will appear under the Groups heading in the left-hand column of Mendeley Desktop. Any other groups you create or join will also appear here.

A safe icon indicates that the group is private, while a folder icon indicates a public group. A folder with a small head and shoulders icon indicates a group of which you are a full member. A folder with a blue arrow indicates that you are following that group and are not a member.

Inviting members to a group

Public groups (Open and Invite-Only) can be found and joined by users using the group search tool on Mendeley.com. You can also invite people to join a public group if you think they should become members. Private groups can only be joined by invitation.

To invite others to a group in Mendeley Desktop, click on the 'Members' tab. You'll find an invite tool in the top-left of the central panel. You can either enter an email address, or start typing the name of someone you follow on Mendeley in order to be prompted to select them as an invitee.

Click the 'Send' button to complete the process. If sending an invite by email to someone without a Mendeley account, they'll be prompted to sign up before they can join the group.

Adding references to a group

In order to share references with other group members, you need to drag and drop them onto the appropriate entry in the left-hand column of Mendeley Desktop, just as you would with folders.

[TIP – Personal Annotations: Note that, in the case of PDF papers, any annotations or notes that you may have added to the reference in your personal library will not be carried across. Adding the paper to a group effectively creates a fresh copy of the paper.]

Accessing groups

When clicking on a group's name, you'll initially be taken to the discussion page. This keeps track of who has added references to a group, with notifications appearing in a newsfeed format. Discussion threads can also be created. You can 'Like' individual posts and also add comments.

Switch to the 'Documents' tab of the group to see all of the references that have been shared with that group. If you are a full member, you can modify the document details of each reference. If viewing a private group, full-text documents will display a download icon next to their entry. Click this to retrieve the group copy of the PDF.

You can opt to download all PDFs associated with a group of which you are a member via the 'Edit Settings' button.

Storage

In addition to the personal storage limit discussed above, a separate storage limit applies to references shared with private groups. PDFs added to a group count towards the storage limit, which is tied to the account of the group owner.

Free accounts have 100MB of group storage. Premium accounts – such as those distributed by certified librarians – have 20GB.

All groups owned by an account contribute to that account's group storage limit.

Using the Citation Plugin

One of Mendeley's most popular features is its ability to manage the insertion of citations into a manuscript, and to also generate a full bibliography automatically. The citations present in a document can also be instantly restyled for compatibility with different citation requirements.

These features powered by the Citation Plugin – a tool that is added to your word processor to create a direct link to Mendeley.

The Citation Plugin currently supports Microsoft Word (on Windows and Mac) and the free alternative Libre Office (on Windows, Mac and Linux).

You must have Mendeley Desktop installed in order to use the Citation Plugin.

Installing the Citation Plugin
The Citation Plugin is installed via the 'Tools' menu in Mendeley Desktop.

The options available to you will depend on which word processor(s) you have installed on your computer.

Choose the appropriate option to begin the installation process, and follow the instructions that appear. The process only takes a few moments to complete, and Mendeley will notify you that the installation has been successful.

Using the Citation Plugin
When you reopen the word processor, you should see the Mendeley toolbar. The exact location will depend on the software and operating system you're using.

- In **Libre Office**, the Mendeley toolbar will appear as a free-floating toolbar that can be resized and re-positioned according to your personal preference
- In older versions of **Microsoft Word**, the Mendeley toolbar will appear in the 'References' tab of the Word Ribbon. The citation plugin supports versions of Microsoft Word from 2010 onwards.
- In **Microsoft Word 2016**, the Mendeley toolbar appears under the 'Add-Ins' section.

The toolbar is comprised of a number of buttons and menus (the specific order varies between word processors):

- **Insert Citation** (or **Insert/Edit Citation**) – This button will begin the process of inserting a citation wherever the cursor is currently located. When clicked, it opens the Citation tool that allows you to search your Mendeley library for a specific reference.
  When the cursor is positioned within an existing Mendeley Citation, this button will allow you to edit that citation instead.
  The current Citation Style controls the format of the citation. See <u>below</u> for more details.
- **Undo Edit** – Use this button to undo any changes made to Mendeley citations.
- **Merge Citations** – With two adjacent citations block highlighted, pressing this button will combine them into a single, properly formatted citation.
- **Insert Bibliography** – Creates a bibliography of all the Mendeley citations inserted into the current document. The bibliography will be inserted at the cursor's current location.
  The current Citation Style controls the format of the bibliography. See <u>below</u> for more details.
- **Refresh** – This will update all the Mendeley citations and bibliography to use the most current details for each reference. If you correct an Author Name in Mendeley Desktop, for example, you will need to press Refresh for that change to be updated in any citations added to the current document
  Note that inserting another citation, or bibliography, as well as updating the current Citation Style will also cause the document to refresh.

  [TIP – Mendeley Fields: The Mendeley Citation Plugin works by adding a piece of detailed code at the location you insert a citation. This is then 'masked' to display the relevant details in the appropriate style. This allows Mendeley to restyle the existing citations on the fly – but it also means that manual changes to an inserted Mendeley field will be reverted the next time the document refreshes.

If you need to make a correction to any of the reference's details, make them in Mendeley Desktop. This change will then propagate to the document as of the next refresh. To add specific details to a particular reference (such as page number), you should instead 'Edit' the citation, as discussed above.

Alternatively, you can wait until the document is completed, then 'flatten' it to remove the Mendeley Fields (see tip below). This will convert the citations to plain text, allowing you to make changes, but will prevent you from being able to restyle the citations, or automatically update the bibliography.**]**

- **Citation Styles** – Use this dropdown menu to select the active Citation Style for your document. Mendeley will display a number of the most popular styles by default, but you can also use 'More Styles' to be taken to the styles menu in Mendeley Desktop. This allows you to download additional citation styles from a repository of over 7,000 community-generated styles.
- **Export** – This allows you to save a separate copy of your document. This can be used to carry across Mendeley citations into a format compatible with another word processor (e.g. from Microsoft Word to Libre Office, or vice versa). It can also be used to save a copy without Mendeley Fields. This process is sometimes known as 'flattening'.

[TIP – Flattening: Before finishing a document, you should remove the Mendeley fields by flattening the document (done via the Export menu on the Mendeley Citation Plugin toolbar). This will remove the code that powers the Mendeley Fields, converting the entire document to plain text.

Once this has been done you will no longer be able to restyle your document, and the bibliography will no longer automatically update to include new references – so make sure you are totally happy with your references before undertaking this step.**]**

Citation Style Language (CSL)

Citation Style Language (CSL) is a type of code, used by Mendeley, to control the way in which citations and the bibliography are set out.

Different publishers and journals require different information to be provided, and for the contents to be formatted in different ways. CSL allows Mendeley to apply different formatting rules to citations on the fly, so you can switch from using APA to IEEE with a single click.

Mendeley comes with several population citation styles already installed, but you can also find and install new citation styles (choosing from repository of over 7,000 items). You can even customize a style, or create a new style from scratch, using Mendeley's CSL Editor.

Installing new styles
In Mendeley Desktop, open the 'View' menu, and then open the 'Citation Style' submenu. This shows a list of installed, recently used styles. Click 'More Styles' to view a full list of all installed citation styles. Click on a style and press the 'Use this style' button to set it as active.

Switch to the 'Get More Styles' tab to search for a new style. Enter a keyword associated with the style you want in order to view a list of possible results.

Once you've found the appropriate style, click it and then click the 'Install' button in order to download the style. This style will now be available for you to use.

Previewing a style
To preview how the active style will look when used, open the 'View' menu and choose 'Library as Citations'. This will display entries in your library as if they were citations.

Use 'View' > 'Library as Table' to return to the default view.

Localizing your citations
When citations are generated, certain elements (such as 'et al') are automatically included. Many languages do not use these terms, so it is possible to localize them to use alternatives.

Open the Citation Styles menu using 'View' > 'Citation Styles' > 'More Styles' and make sure the 'Installed' tab is active. At the bottom of the window is a dropdown menu labeled 'Citation and Bibliography Language'. Choose the appropriate language from this list in order to use the localized terms in your manuscript.

Modifying or creating a new style

The Mendeley CSL Editor can be accessed via http://csl.mendeley.com/about/.

For details of how to use the editor, see the [dedicated guide in the Mendeley Resources Center](#).

Discovery
Mendeley Desktop also offers a number of ways to discover new relevant research. These can be used to retrieve the document details for a reference – to access the full-text of a new paper, you will need to visit the original publisher for details of how to gain access.

- **Mendeley Suggest** – Previously only available to premium account holders, Mendeley Suggest was opened to all users at the start of 2016. Visit www.mendeley.com/suggest to get started. By looking at a number of factors – including your area of study, the contents of your library and your most recently added references – Mendeley Suggest will make personal recommendations for you. You can then add them to your library with just one click. Make sure to Sync Mendeley Desktop to pull down any new additions.
- **Related Papers** – Right click on a single paper, or select several papers before right clicking, and choose 'Related Papers'. This will consult Mendeley's Web Catalog for papers commonly used in conjunction with your selected item(s).
- **Literature Search** – Use this option, which appears in the top of the left-hand column, to search Mendeley's Web Catalog for a keyword or phrase. Click to select a result, and then choose 'Save Reference', which appears in the document details column.
  Note that as this is only searching the Mendeley Web Catalog, it will only look at papers that have been added by other Mendeley users.

Mendeley mobile apps
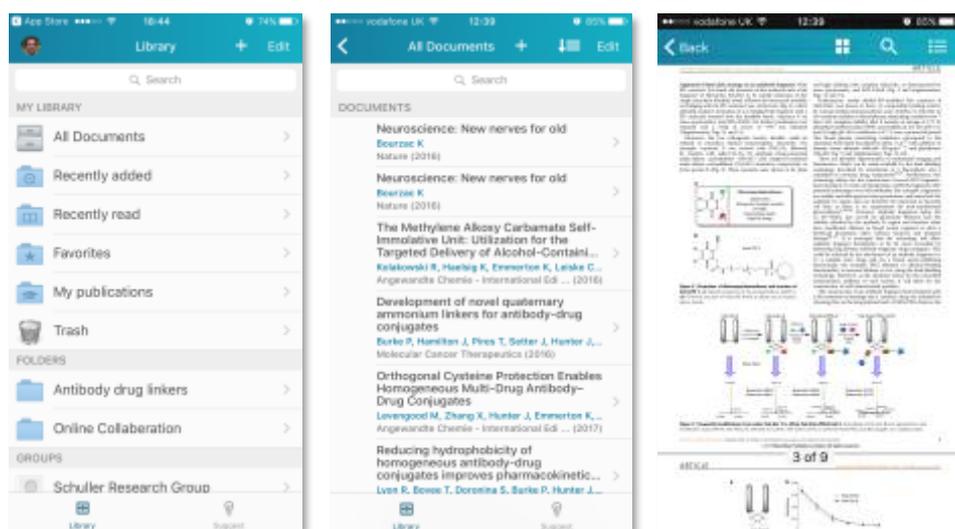
Overview

Mendeley Desktop remains the most popular way to make use of Mendeley's main features, but users increasingly need to access their reference materials from other types of devices (such as tablets or phones). Mendeley's mobile applications were therefore developed in order to provide library access while on the go, or in the lab.

The mobile applications are intended to act as 'companions' for wider Mendeley usage and are designed to focus on the reading and annotation of papers. It's recommended that the apps are used in conjunction with Mendeley Desktop for the best experience.

iPhone & iPad

The Mendeley App is designed to work on iPhones and iPads alike. It can be downloaded from the Apple App Store.

For a full guide to using the iOS application, see the dedicated guide in the Mendeley Resources Center.

Android

The Android application is designed to work with any device running the Android operating system – including phones and tablets. It can be downloaded from the Google Play Store.

For a full guide to using the Android application, see the dedicated guide in the Mendeley Resources Center.

![MENDELEY]
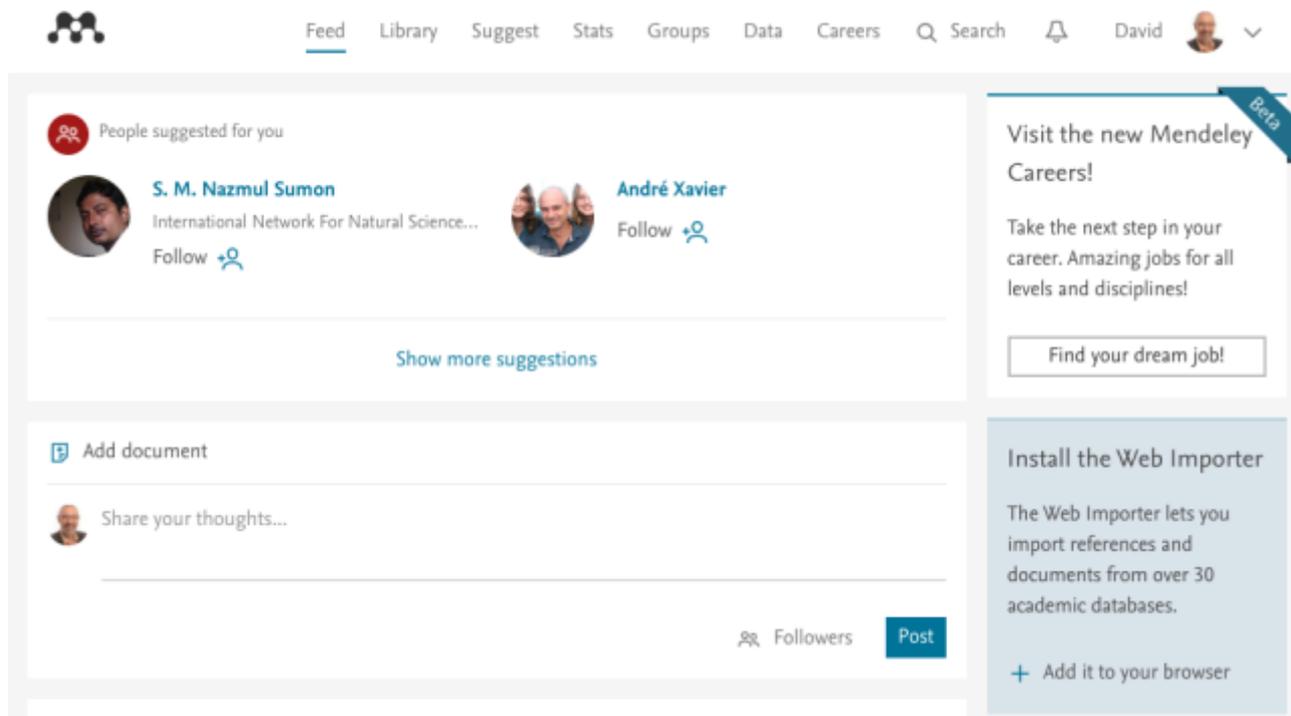
Mendeley Web

Overview

Mendeley Web has several objectives:

- To allow users to access Mendeley functionality – such as their personal library – through a web browser, providing access whenever and wherever it may be required.
- To allow users to easily grow their personal libraries by adding materials from online catalogs.
- To provide a social space for users to connect with others, to build & grow their personal profile and to manage key career milestones.
- To allow users to cite on Microsoft Word directly, without using Mendeley desktop
- To search for career opportunities on Mendeley careers
- To store and share datasets on Mendeley data

To achieve these, Mendeley.com provides a number of services. Many of these serve one or more of these objectives.

Web Library

Accessible via www.mendeley.com/library, this allows a user to access a browser-based version of their personal library. It offers a similar interface to Mendeley Desktop, but has been optimized for web viewing. It was also designed to work well on tablets – meaning that it can be used as an alternative to the dedicated applications on devices running alternative operating systems.

Layout

The Web Library uses a three-column interface, following the same approach as Mendeley Desktop.
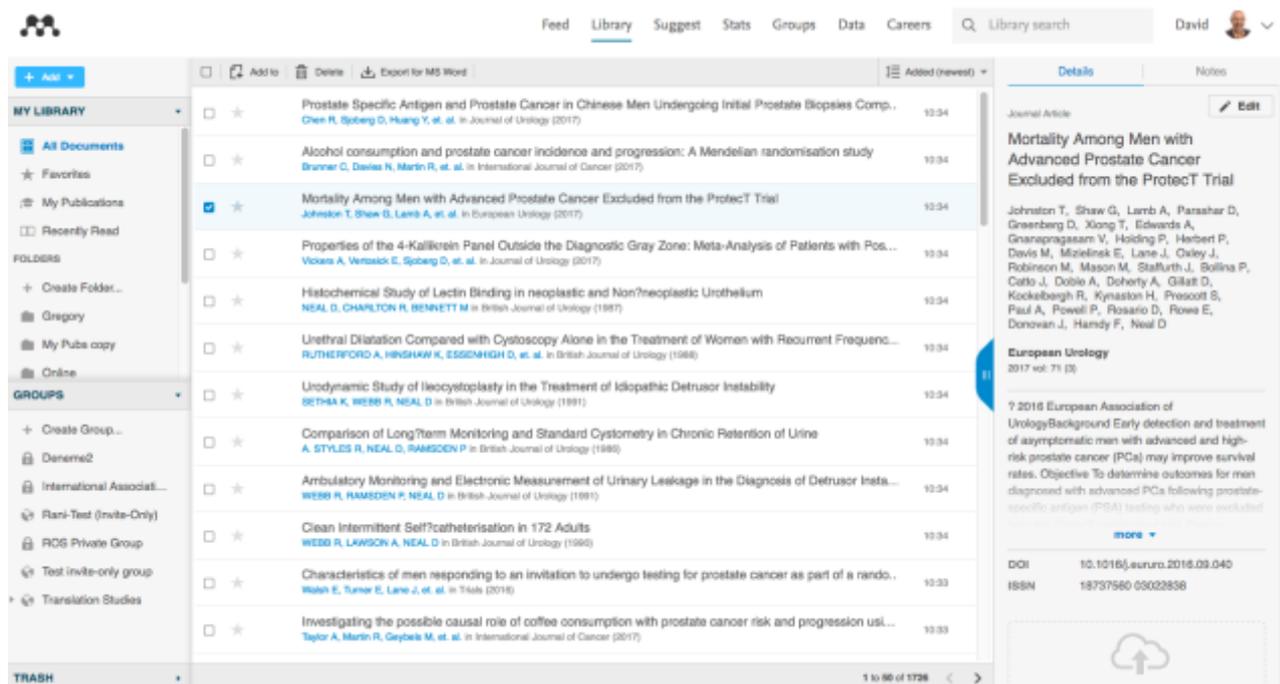
The left-hand column allows for the filtering of the library view. In addition to **Favorites** and **Recently Read** – which work in the same way as in Mendeley Desktop – all of a user's personal folders will also be displayed by default. **Groups** and **Trash** appear as separate headings at the bottom of the column. These can be clicked to expand them.

The central column shows the current list of documents. The view is limited to 50 items – to view the next or previous 50, use the navigation arrows that appear in the bottom right corner of the panel. To change the sorting order, use the dropdown menu that appears in the top right. To access the reader view for PDF documents, click on the PDF icon that appears.

The right-hand column shows the details of the currently selected reference. To make changes to the reference, use the Edit button. You can access your notes using the **Notes** tab, and also add or modify notes using the interface. The right-hand column can be collapsed and retrieved using the blue tab that appears to its left.

The search field, which appears in the top right corner, allows you to search your library using keywords.

Adding references
The Web Library allows you to add new documents to your library, by uploading them using your browser.

Click on the blue 'Add' button that appears at the top left corner of the screen, and choose 'Import document'. Browse to the location of the file you wish to upload, and select it to begin the upload process.

The Web Library will automatically create a library entry for the reference, and will also attempt to extract metadata from the file. You should check and correct this metadata using the right-hand column.

Using the 'Add' button, you can also opt to

- 'Add entry manually…' This will allow you to manually enter the details of a reference, creating a metadata-only library entry.
- 'Add New folder…' to your library
- Import external libraries in any of the following formats: EndNote (xml), RIS (.ris) and BibTeX (.bib)

To exclude items from the Web Catalog (as described above) click the "Edit" button on the right panel and check the check box that appears near the bottom of the document details column.

As in Mendeley desktop, documents can also be added by dragging and dropping documents to web the center panel.

Organizing references
References in the Web Library can be organized using many of the same approaches used in Mendeley Desktop. Changes made to your organizational structure will be reflected in

Folders
Any folders you have already created will be visible in the left-hand column. Click on one of these items to view references stored within the folder.

To add new references to a folder, click the check box that appears next to its entry (multiple references can be selected at once) and click the 'Add to' button that appears in the top left of the main column. Select the appropriate folder from the list, and press the blue 'Add' button at the bottom of the interface.

To create a new folder, use the blue 'Add' button that appears at the top left corner of the, and select 'Add folder'. Enter a name for the new folder into the popup interface and press ok. Your new folder will be automatically created and opened. Alternatively, you can use the "Create Folder" option available on the left-hand column under Folders to create new folders.

To create sub folders or remove existing folders click on the name of the folder and then click on the three vertical dots that appear to the right of the name to open the folder options menu.

. References can be added to subfolders using the 'Add to' tool. Click the plus symbol that appears next to the parent folder to expand its subfolders, and select the appropriate listing.

Tags
At present the Web Library does not support filtering by tags, but you can still add tags to references in order to use them in Mendeley Desktop.

To add tags to a reference, click to select it and click the 'Edit' button, which appears in the right-hand column to begin editing the reference metadata. Scroll down to the 'Tags' field. You can enter a new tag by typing the appropriate label and adding a semicolon (;) once you're done. The Web Library will then convert this into a tag element. You can remove existing tags by clicking the 'x' that appears next to them.

Once done, press the 'Save' button to commit your changes.

Filter views
Similar to Mendeley Desktop, Web Library offers a number of built-in ways to filter your view easily:

- **Favorites** – Filter your view to only items that have been starred in any Mendeley application. You can start a new reference at any time in Web Library by clicking on the star icon that appears next to the reference entry.

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- **My Publications** – Filter your view to only items that have been added as your personally authored publications. You can add personal publications using the 'Add to' menu as described above.
- **Recently Read –** Filter your view to a list of the most recently opened PDFs. Mendeley keeps track of which references you've read – on any device – allowing you to get straight back into a paper.

Search

The Web Library search field is located in the top right of the interface. Enter your search term, and click the magnifying glass – or press enter- to start the search.

Note – unlike Mendeley Desktop's context-specific search, Mendeley Web Library will always search your entire library.

The PDF Reader

For references with PDF documents attached, a PDF icon will be displayed next to the entry. Click this to open a new tab for the PDF Reader view of the document.

While similar to the Mendeley Desktop PDF Reader, the browser-based reader has a slightly different layout. Most navigation and annotation tools are accessed from the main toolbar that appears at the top of the page. The elements from left to right are as follows:

- **Navigation menu** – accessed via the icon at the top-right corner, which resembles small images alongside lines of text. Click this to open a list of thumbnailed pages, allowing you to quickly navigate to a specific location within the document. You can also click the 'Contents' tab to view a list of key locations within the document. Note that 'Contents' is only accessible for documents that support this feature.
Click the icon again to close the navigation menu.
- **Zoom options** – set your zoom level using the plus and minus buttons, or by picking a specific value from the dropdown menu.
- **Search field** – allows you to search for specific words or phrases within the PDF you're reading. Using the left and right arrows to jump between different instances. Note that with some PDFs – such as scanned documents with no OCR – search may not be able to identify all instances.
- **Text selection tool** – accessed via an icon of an 'A' and a cursor. This allows you to select text within a document for copying and pasting. Once a passage has been selected, you'll also see the option to highlight and/or add a note appear.
- **Pan mode** – accessed via the icon of a hand, this tool allows you to click to drag your view up and down.
- **Create sticky note** – click the icon of a sticky note to set this tool as active, and then click at a particular location within the PDF to add a sticky note. Type your notes into the field that appears. You'll see that the PDF reader saves your notes as you add to them. Click anywhere outside the note to close it.
Notes in a document will be indicated by a small, yellow sticky note icon, which can then be clicked to open.
Sticky notes can be deleted by opening, and then clicking the trash can icon that appears in the top right corner.
- **Create highlight** – indicated by a highlighter icon, click this to set the tool as active and then click and drag across a passage of text to highlight it.

Highlighted passages can be 'focused' by clicking on them with the text selection tool active. Click outside the passage to disable the focus. While focused you're also able to add a sticky note, or remove the highlighting entirely by clicking the trash can icon.

- **Select color** - indicated by a blue-colored circle, click on this to set the color for your sticky notes and highlights. You can choose from a range of 8 different colors.

- **More options** – click the icon of three vertical dots to open this dropdown menu. This allows you to either download or print the PDF.
  Note that these options will not currently include any notes or annotations. It is recommended that you use the PDF export functionality of Mendeley Desktop if you need to retrieve a copy of the PDF complete with annotations.

- **Account options** - click on the icon with your photo to access to: your profile, settings, support or to log out from Mendeley.

Collaboration

The Web Library allows you to access papers shared with groups of which you are a member but, unlike Mendeley Desktop, does not facilitate discussion directly. See below for more details of using groups on Mendeley Web.

Click on the 'Groups' tab that appears at the bottom of the left-hand column to expand the list of groups, and click on a particular group name to access its resources. In the Web Library interface, public groups are indicated with a small globe icon, while private groups display a padlock icon.

With public groups, you will be able to access the reference metadata of entries – as discussed in some detail above. You can use the Web Library interface to modify the details of papers shared with groups of which you are a member.

With private groups, you will also be able to access the PDFs of shared papers. Click the icon to view the PDF. As with personal library PDFs, you'll be able to add annotations and highlighting. Highlights and annotations added by other group members will also be visible. Click on the sticky note icons to see who added a specific contribution.

Creating a new group in the Web Library
You can create a new group by clicking the 'Create Group…' option, which appears under the 'Groups' tab in the left-hand column. This will take you outside of the Web Library interface to the group creation tool of Mendeley Web.

Groups in Mendeley Web

Mendeley maintains a directory of all publicly accessible groups, and also provides a web presence for each group. Private groups also have a web presence – access to which is determined by membership – but are not listed in the directory of groups.
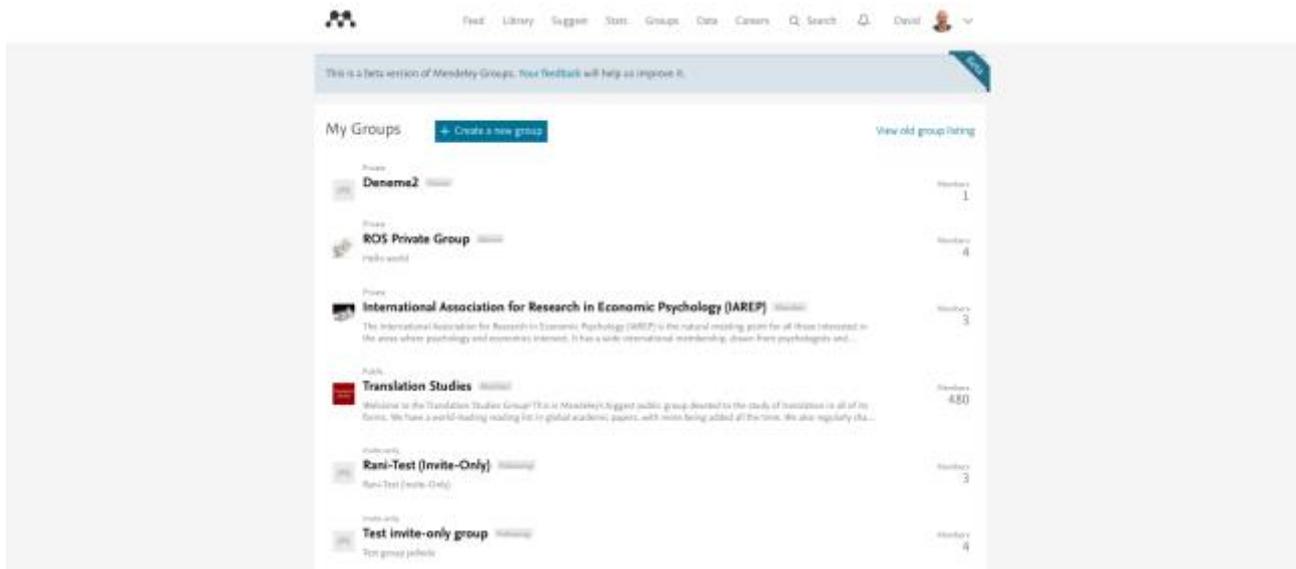
Visit https://www.mendeley.com/groups/ to view a list of groups of which you are either a member or follower. Groups you personally own, or have the ability to administer, will also be listed under separate headings.

Clicking on a group shows the main group newsfeed. This reveals details about who has recently added references to the group, as well as any discussion that has been posted. You can start a new discussion thread using the field that appears at the top of the newsfeed, or reply to an existing post using the comment field that appears underneath each thread. You can also 'Like' individual posts in order to show your approval.

Use the left-hand menu options to switch between different views of the group:

- **Overview –** The main newsfeed view. Provides details of the group as well as:
- a Members pane with list of the members that allows following and inviting other members.
- Add document weblet to share thoughts and documents with the team as in most social media feeds.

    [TIP – Mendeley Fields: try copy pasting a link from any external source. Mendeley will pull out all the metadata (including a picture, if available) and provide a snippet version of the article. This will automatically be posted to the group's newsfeed and other members are able to like it, comment on it or share it.

- Scan through what members are sharing and commenting as well as interacting in discussions.

- **Members –** Provides a list of all group members. You can either browse, or search for a particular member using the search field, which appears in the top right of the page.

- **Documents –** Provides a list of all references shared with a group. By default, these are ordered with the most recently added items first.
  Each paper listing will provide details of when it was added to the group, along with the number of readers (i.e. the number of Mendeley users with that reference in their personal library). Clicking on the name of any listed papers will take you to the Web Catalog entry for that paper. See below for more details of the Web Catalog. If viewing a private group, you will also have the option to download a copy of the shared PDF.

- **Settings** – This option only appears for groups that you own, or can administer. You can use it to edit your group's name, description, associated link or the thumbnail image for the group. You can also use this menu to monitor the amount of storage your group(s) are using. See Account limits for more details.

You can find a more detailed guide to Groups in the Mendeley Resource Center.

You can also find a dedicated guide to Private Groups in the Mendeley Resource Center.

Finding new groups to join

Use the search tool on https://www.mendeley.com/groups/ to search for new public groups to join. Groups are usually dedicated to a specific topic, or project.

The main list of search results shows the number of members present in the group, as well as the number of references shared with that group – although remember that public groups only allow the sharing of reference metadata, so the ability to read those papers will depend on your ability to retrieve them from the relevant catalog or publisher.

Click on the name of the group to view its listing. You can use the Overview tab to see a summary of recent activity. If you're interested in joining as a member, click the green 'Join this group' button that appears in the top right of the page. You can also opt to become a follower of the group by opening the dropdown menu on the 'Join this group' button, and choosing 'Follow this group' instead.

Group followers can view the contents of the group and access the references shared with it, but cannot modify the references or add new references to the group.

If a group is set to be invite-only, you can apply to become a full member – but this application must be approved by the group owner/administrator.

Creating groups

As with Mendeley Desktop, the process of creating new groups is very straightforward.

From the main Groups page - https://www.mendeley.com/groups/ - click the blue 'Create new group' button in the top of the screen. This opens the group creation tool, which is identical to that of Mendeley Desktop.

See the section on Creating a group in the Mendeley Desktop guidance above for more details.

Alternatively, see this page of the Mendeley Resource Center guide to Groups.

The Web Catalog

Mendeley takes all references added by users and uses them to populate the Mendeley Web Catalog. Sophisticated algorithms examine the various entries generated, in order to identify where multiple users have added the same paper and to identify the correct details for that document.

For example, if three users all add the same paper with identical document details, the Catalog can be fairly confident that those details reflect the correct details of the paper. If three users add the same paper, but one user includes a typo in the title of the paper, the correct title is more likely to be taken due to the weight of numbers. Papers imported from a respected source – such as Science Direct – are also regarded as more trustworthy.

Although the Web Catalog can be accessed by using the Literature Search feature of Mendeley Desktop, it can also be extensively browsed via a web browser. The Web Catalog can be a useful way to discover new references, but also learn important information about how specific references are being used by other researchers.

Accessing the Web Catalog

The Catalog can be accessed directly by visiting https://www.mendeley.com/research-papers/. From here it's possible to initiate a catalog search by using the search field, or to browse specific disciplines for popular papers. A catalog search can also be initiated from any page on Mendeley.com by clicking the magnifying glass that appears on the top toolbar, and ensuring the 'Papers' option is selected.

Using the Web Catalog

Each paper in the Catalog has its own page, which can be accessed by clicking on the name of the paper in search results, or in a group's Papers tab. A Catalog entry page, such as https://www.mendeley.com/catalog/choose-good-scientific-problem/, provides a number of details about the paper. These include:

- Title
- Author
- Discipline
- Publication details – including identifiers such as DOI, ISBN etc.
- Access details of where the full text of a paper can be retrieved/purchased
- Abstract

In addition to this metadata, Mendeley also provides a number of details based on Mendeley usage. These include:

- Readers – i.e. the number of Mendeley users who have this reference in their library
- Usage by discipline
- Commonly applied tags
- Related papers – other references commonly found to be read in conjunction with the current paper.

The Web Catalog entry for a specific paper also allows you to easily add it to your personal library. Just click the green 'Save reference to library' button which appears in the top right corner of the page.

If the paper already exists in your library, this button will be replaced with a white 'View in Mendeley Desktop' button. Pressing this will switch your focus from your web browser to Mendeley Desktop, and start a sync. Once the sync completes the relevant reference will be selected for viewing.

![Mendeley logo]

Mendeley Web Importer

The Mendeley Web Importer allows Mendeley users to grow their libraries by retrieving the details of a reference being viewed in a web browser. This can be a single catalog entry, or a list of results from a tool such as Google Scholar. The details of the reference are then used to create a Mendeley library entry. Wherever possible Mendeley will also attempt to download a copy of the relevant PDF file.

The Web Importer is a snippet of code that is added to the bookmarks or favorites menu of your browser. This can then be run at any time when viewing a suitable page.

Mendeley Web Importer is available for all major browsers (Chrome, Firefox, Safari and IE)

Installing the Web Importer

The Web Importer can be installed by visiting https://www.mendeley.com/reference-management/web-importer/. Follow the instructions that appear on this page..

Using the Web Importer

When viewing a reference that you want to add to your personal library, open your favorites/bookmarks menu and click the 'Save to Mendeley' entry.

The Mendeley Web Importer will run, creating a small popup within your browser. It will attempt to retrieve details of the reference you're viewing, and will provide a summary of the details it finds. Once you're satisfied, press the 'Save' button to add this reference to your library.

If multiple references are detected on the page (such as a list of Google Scholar results) the Web Importer will provide a list of references, allowing you to choose which specific results to add to your library. Click the plus symbol which appears next to each item in order to add it to the batch, or use the 'Save all' button to add them all at once.

Once a reference (or multiple references) has been added to your library, you can use the button that appears in the Web Importer to switch over to Mendeley Desktop. Once the automatic sync completes, your new references will show up in your library. It's recommended that you review the details of the new entries to verify them.
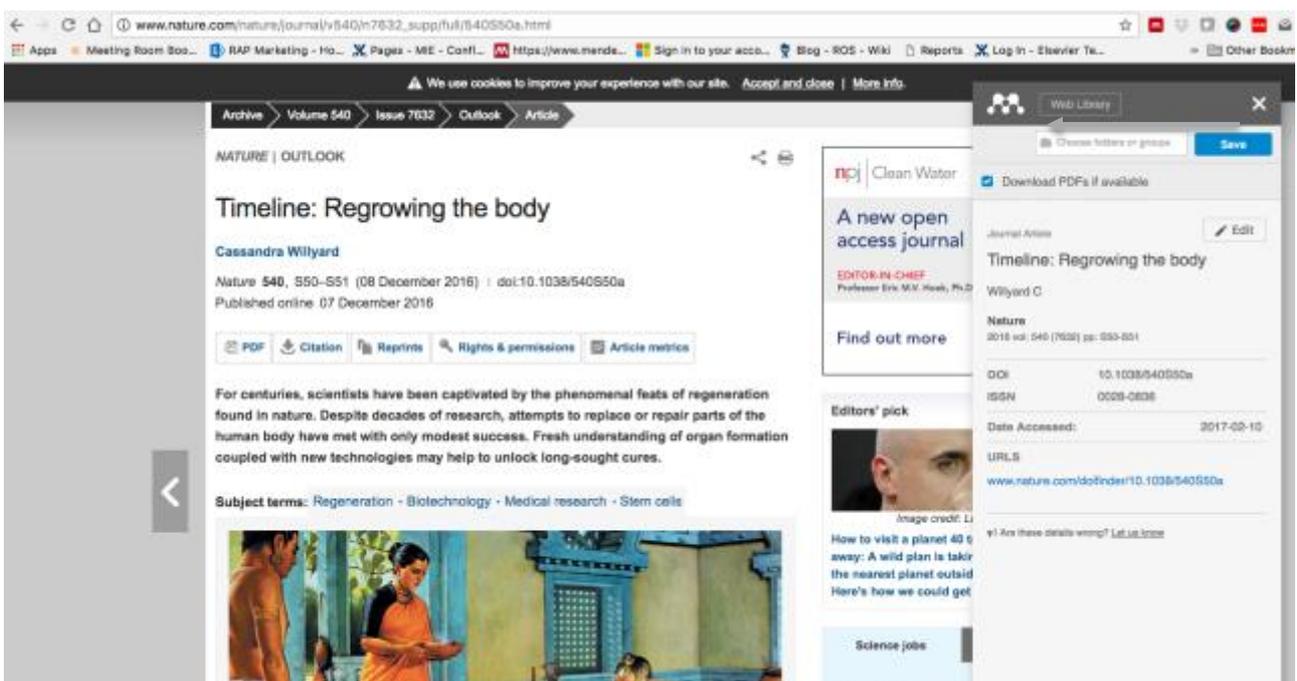
ELSEVIER

[TIP – Web Importer compatibility: The Mendeley Web Importer is designed to work with a wide range of online catalogs and repositories, but due to the huge variety of implementations, it cannot provide 100% accuracy in all situations. If you come across an online catalog with which Mendeley Web importer does not work please let us know by creating an entry on our feedback forum

It is strongly recommended that you review any references added to your library, and use either Mendeley Desktop or the Web Library to correct a document's metadata.

Advanced Web Importer usage
In addition to adding references to your library, you can use the Web Importer to add personal touches at the time of import.

When the popup opens after pressing the 'Mendeley Web Importer' icon on a single reference (as opposed to a list from Google Scholar) you'll see that a number of additional fields are available:

- **Choose folders or groups** – Use this dropdown menu to select either a specific folder or specific group to which you intend to add the reference.
- **Edit** – Add/edit article metadata such as: article type, title, authors, abstract, details as well as adding personal tags – separated by semicolons – to the reference. If you do not want the reference to be added to the Mendeley Catalog, just check the 'Exclude from catalog' box at the bottom.
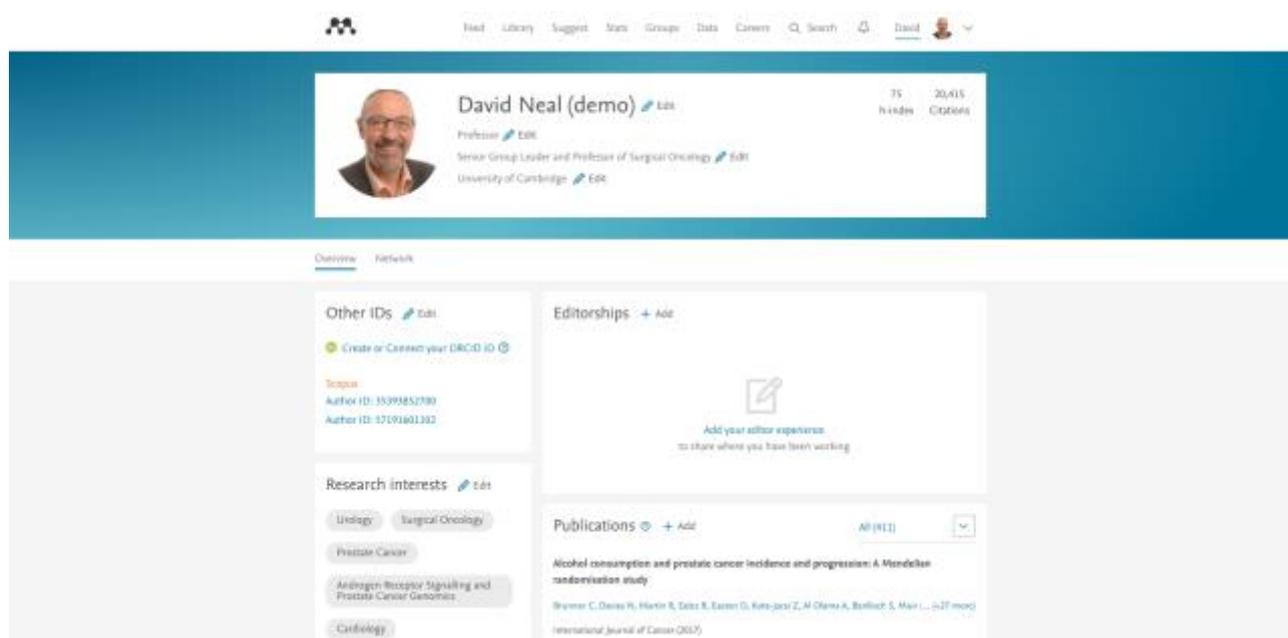
Once you press the 'Save' button and the reference is successfully added to Mendeley, press the 'Open in Mendeley' button to switch over to Mendeley Desktop and initiate an automatic sync. Once the sync completes, your new reference will be present – along with the additional personal Notes, Tags or filing options that you provided.

Using Mendeley's social features
In addition to allowing you to manage your reference materials, Mendeley offers a number of features designed to enable you to grow your academic profile and to connect with other researchers from around the world.

The most basic element of this is your Mendeley profile, as it allows you to showcase yourself and your work. Completing your profile and keeping it actively maintained helps to make the most of Mendeley's other social features, which are covered in detail below.
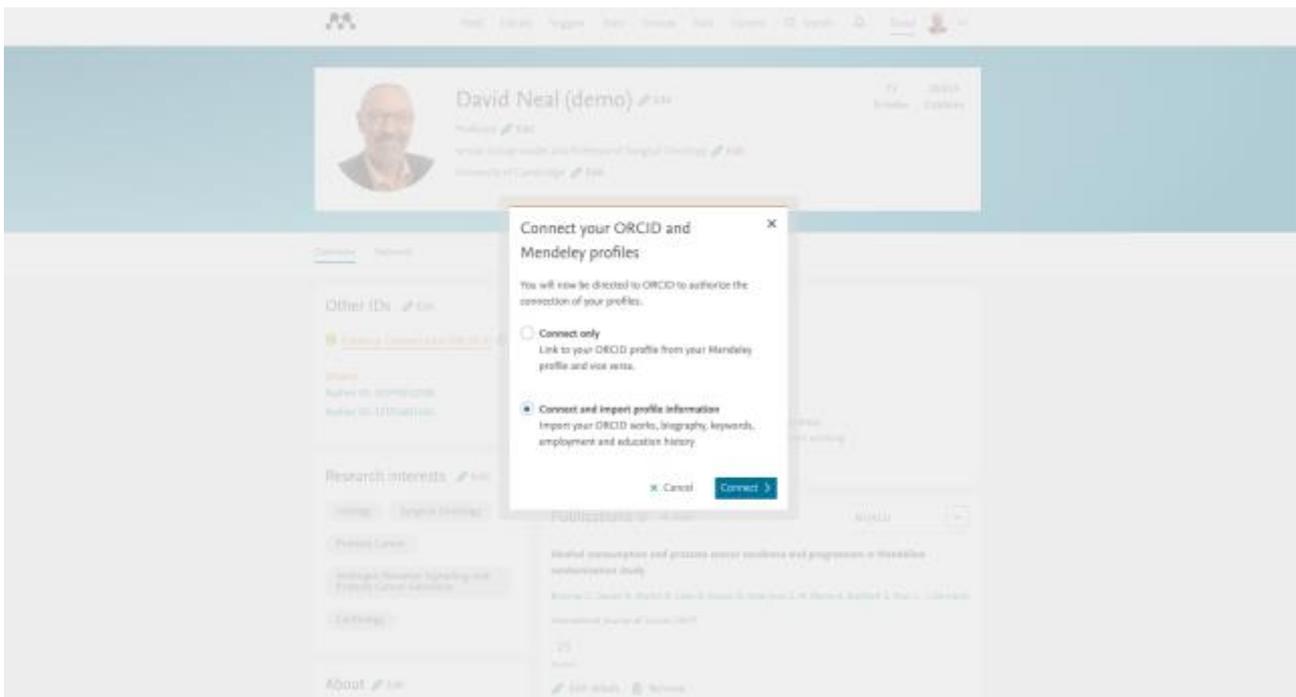
Mendeley profiles

At the time of account creation, a Mendeley profile is also generated. Initially this contains some very basic information, so it's a good idea to add more detail to your profile. Your Mendeley profile includes a progress widget, which suggests next steps in order for you to achieve profile completion.

Completing your profile

You can view your profile at any time by clicking on your name, which appears in the top right hand corner when viewing Mendeley.com. Editable fields are indicated by a small pencil icon. Click on the appropriate 'Edit' link in order to start adding information. In order to achieve 100% profile completion, follow these steps:

- **Add your photo** – Add a photo of yourself. This will appear on your profile, as well as in other locations – such as in the membership list of a group you join. Having a photo on your profile makes it more appealing to other researchers – they're more likely to connect with you if they see a picture. Plus, it's always nice to put a face to a name.

- **Add your Editorships** – if any to share where you have been working

- **Add your research interests** – Adding specific topics to this area of your profile has a number of benefits. Firstly, it helps Mendeley to make more accurate recommendations to you when using the Suggest feature (see the section on Mendeley Suggest for more detail). These interests will also be visible to others who visit your profile. A specific research interest is likely to catch the eye of potential collaborators.

- **Add your publications** – If you're a published author, you can add your publications to your Mendeley profile to claim them. This makes it easier for other Mendeley users to discover your work, as well as helping to connect with you if they're interested in collaborating.
  Adding your publications will also allow you to access information about their usage on Mendeley – giving you a valuable insight into how your papers are being read and used.
  You can add your publications directly from this page, by adding papers to the 'My Publications' folder in Mendeley Desktop or Web Library, or by completing the Scopus Author Claim process covered in detail below.

- **Add your Professional Experience and your Education history** – Affiliating yourself with a particular institution helps other people at that university/school/institution find you on Mendeley. It also helps to differentiate you from other people with a similar name.

[TIP – Add other research IDs – currently you can add your Scopus ID (read more about how here) and your ORCID (You can connect only by linking your ORCID profile from your Mendeley and vice versa. Or connect and import your profile information, this will import your ORCID works, biography, keywords, employment and educational history to Mendeley straightaway.

In addition to these steps, you should aim to complete your personal summary, your professional experience and education history. Keeping these maintained will provide other Mendeley users with current information about you.

Changing account settings
In addition to your public profile, you may also need to edit your account settings. Click the dropdown arrow that appears next to your name and photo (in the top right corner of Mendeley.com) and choose 'Settings' to start making changes on one of the following menus:

- **Account settings** – Use this menu to change your email address or password. You can also delete your entire Mendeley profile.
- **Privacy** – Use this menu to change how your Mendeley profile behaves. By default, your entire profile will be visible to anyone. You can modify individual settings for different aspects of your profile:
  - Whether you want your new publications are automatically added to your profile by Mendeley or not
  - Whether you want to approve other Members follow requests or not
  - Whether you want your profile page to be indexed or not by search engines (checking this box means your profile will not show up in any search results outside Mendeley)

- **Notifications –** This menu allows you to modify the circumstances under which Mendeley will display notifications or contact you via email. Notifications are divided into general activity and group activity.
- **Job preferences:** for now, this menu currently links to Mendeley Careers. Job preferences is not available just yet.
- **Billing –** If you have purchased a Premium Plan, you will find the payment details and transaction history listed here. You can also register a new payment card, if required.
  Note that this does not apply to Premium accounts earned via MIE or Librarian Certification, but only to Premium Plans that have been independently purchased directly from Mendeley.

Connecting with other researchers

Connecting with other researchers is one of the major benefits of having an active Mendeley profile. It opens the door to collaboration, as well as helping to find other people who are active in your field.

Finding other Mendeley Users

There are a few options open to you when trying to find new contacts:

- **Name search** – Click the magnifying glass that appears on the main toolbar, and make sure 'People' is selected. Enter the name of the individual you are trying to find. Find the appropriate person in the list of search results and either click their name to view their profile, or use the 'Follow' button to start following them immediately.
- **View followers** – When looking at other users' profiles you'll be able to see a list of whom they're following. This can often be a good way to build a network of likeminded researchers.
- **Browse groups** – When viewing a group, use the Members tab to view a list of members of that group. You can then access profiles, or opt to follow individuals directly from the membership list.
- **Wider networking** – Add your Mendeley profile to other social media and to your email signature. This will allow others to identify and connect with you.

Following

Following another Mendeley user is a way of marking them as somebody you want to stay in touch with. Whenever their profile is updated you'll see a notification in your newsfeed. For example, if they add a new personal publication to their profile, you'll be informed via notification.

You can view a list of people you're following via your personal profile. You'll also see a list of who is following you.

Note that some users require their followers to be approved (as discussed above).

Messages

You can send messages to any Mendeley user – whether you're following them or not.
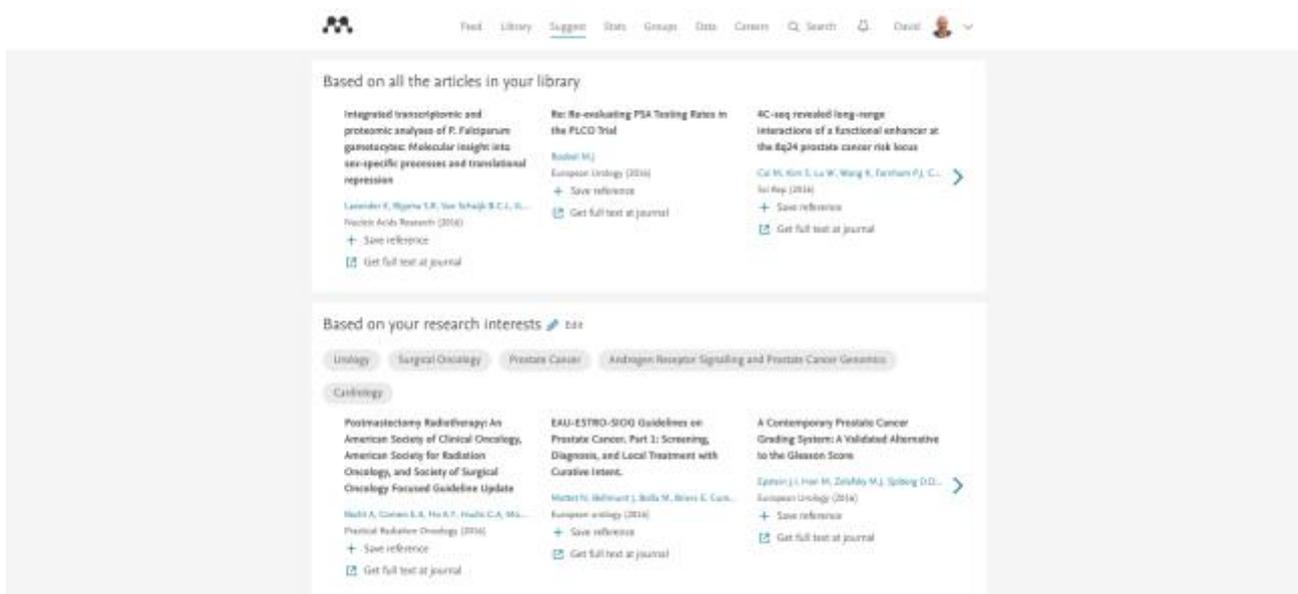
To send a message, visit another user's Mendeley profile and click the 'Message' button that appears. Alternatively, when viewing a list of Mendeley users (such as members of a group, or in a search result) click the dropdown menu that appears next to their name, and choose 'Send Message'.

If another Mendeley user sends you a message, you'll receive an email notification – unless this has been disabled.

Mendeley Suggest

Until recently a premium-only feature, Mendeley suggest was made available to all users in January 2016. Mendeley Suggest provides bespoke recommendations of papers based on a number of factors.

To access Mendeley Suggest visit https://www.mendeley.com/suggest/. This can also be accessed via the main toolbar of Mendeley.com or the left-hand menu in Mendeley Desktop.

The suggestions you receive are generated using the following factors:

- All articles in your library
- Research interests listed on your profile
- Popular papers in your discipline – i.e. the most popular papers of all time
- Trending papers in your discipline – i.e. papers that have recently increased in popularity
- The most recently added paper in your library

These suggestions are updated on a regular basis.

Mendeley Suggest learns from your behavior, so by using it to add papers to your library you're actively improving the quality of the suggestions you receive. To add a suggestion to your library, just click the 'Save reference' button that appears beneath its details.

Mendeley Stats

For published authors, Mendeley offers the ability to gain valuable information about how your papers are being read, as well as the impact they're having.

To begin the process, you need to 'claim' your publications by connecting your Mendeley account with a Scopus Author Profile. This will then generate a dashboard, providing an overview of activity connected to your publications, and allowing you to access a more detailed view for individual publications.

Visit www.mendeley.com/stats/ or click on the 'Stats' option in the main toolbar of Mendeley.com.

Important: Stats will become part of your Mendeley Profile soon. When that happens, the Stats dashboard will be integrated with your profile so you can monitor the impact of your work and showcase it to others in one place. Read this article for more information

Claiming a Scopus Author Profile

Before you can use Mendeley Stats, you need to identify which Scopus Author Profile you want to connect with your Mendeley account. Upon visiting Stats for the first time you'll be prompted to do this using an integrated tool.

To identify the Scopus Author Profile that you wish to claim, you can either search for your name, or use the title of a paper you've authored.

- Search by name –Mendeley will initially search for Scopus authors using the name you provided when creating your Mendeley account. This may return the desired result, but you may also find that you need to modify the search terms to find your own listing. Remember that Scopus may use a variation of your name.
  Click the 'Add' link that appears next to the profile that you wish to claim.
- Search by article – You can also claim a Scopus Author Profile by entering the name of one of your published papers. Pick the correct paper from the list of results and find your name in the list of authors.
  Click 'Add' when you've identified the correct listing.

At this stage, you have the chance to review the details of the profile you're about to claim. Make sure you're happy before proceeding.

You also have the option to add the publications taken from your Scopus Author Profile to your Mendeley profile. If you don't want to do this just untick this checkbox.

Using Stats

Once you've completed the claim process you'll have access to detailed statistics for the publications associated with your Scopus Author Profile.
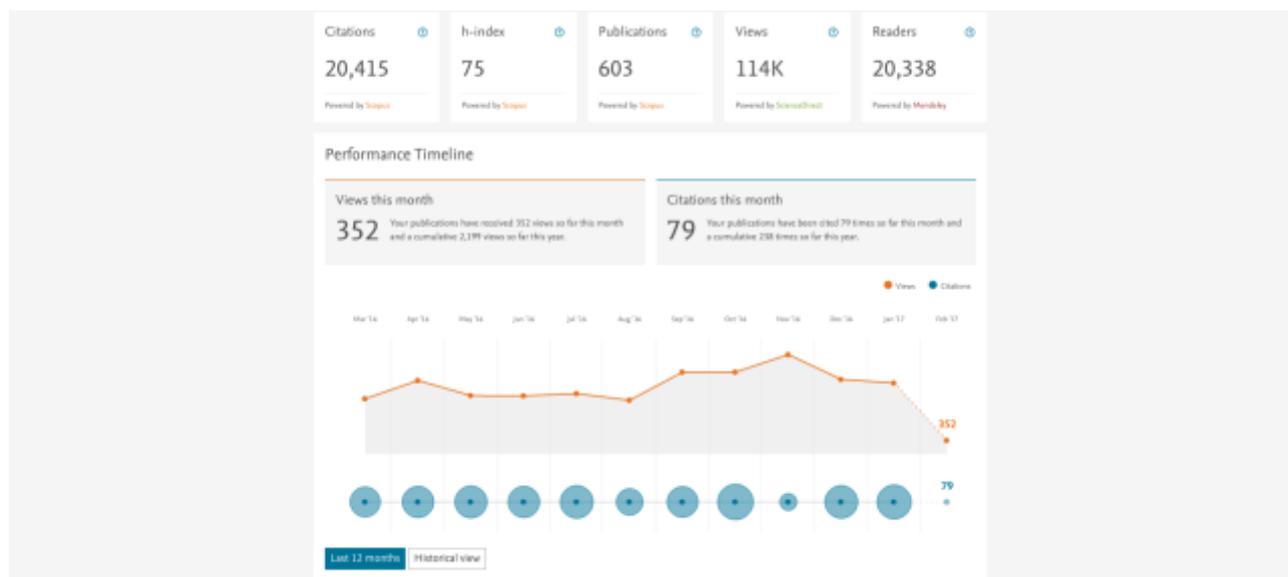

The dashboard (available at www.mendeley.com/stats/) provides aggregated totals for the following items:

![Mendeley logo]

- Number of publications
- Number of citations of your work
- Downloads of your publications from Science Direct
- Number of Mendeley users with your publications in their personal library

You'll also see a graph of download and citation information. By default, this shows the last 12 months of activity, but you can also use the 'Historical view' to show activity for a longer period.

Further down the page you'll find detailed statistical breakdowns for each individual publication. Click on the 'View stats' button that appears under each to view a dedicated page for that paper.
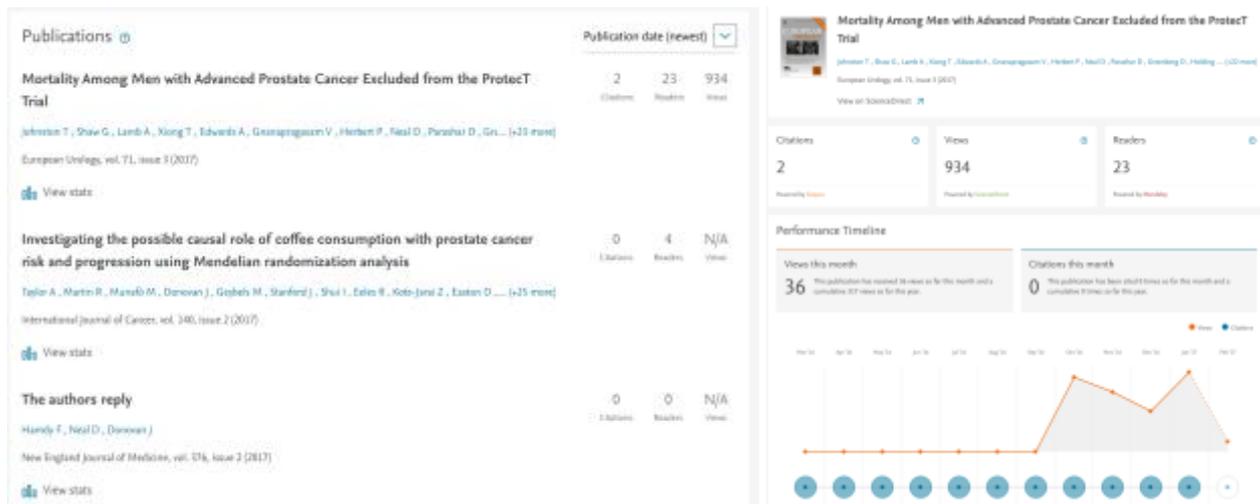
The dedicated view provides detailed usage information for each paper. The amount of data provided depends on exactly where a paper was published – Mendeley can provide more information about publications published in Elsevier Journals, for example.

Reporting problems with Stats

Although delivered by Mendeley, Stats relies heavily on Scopus – particularly its Author Profiles. If the papers associated with your Scopus Author Profile are incorrect or incomplete, you will need to contact Scopus directly to request a correction.

If you have claimed the wrong Scopus Author Profile and need to make a correction, contact the Mendeley support team.

Mendeley Data

Mendeley Data (http://data.mendeley.com/) is a service that allows researchers to upload, access and browse datasets anywhere, for free – On completing their free registration, researchers can browse datasets, add datasets of interest to their personal "My Datasets" page, or submit a New Dataset. Mendeley Data is designed for use via a wide range of devices – desktop, iPhone, iPad – so these options can be pursued at researcher's own convenience, wherever they happen to be. Researchers can upload any number of files of up to 2GB each.

Force-11 Compliant Research Data Citations and DOIs – Research data that is added to Mendeley Data will include a Force11-compliant citation, allowing other researchers to easily cite the work. Force 11, "a community of scholars, librarians, archivists, publishers and research funders" has established a

set of data citation principles designed to safeguard and promote the importance of data as part of "the enduring scholarly record"§. This is a new and distinctive citation type which will play an increasingly important role in the quantification of scholarly value and will, of course, be of acute interest to the research community. A unique DOI will be provided for each version of a dataset that is added to the system, ensuring that its citation will always be valid.

Safe, Secure Archiving – Consistent with the recognition of the scholarly value of research data, Mendeley Data has teamed up with DANS (Data archiving and Networking Services) to ensure that all material posted on the Repository is preserved permanently offline with DANS' dark archive storage.

From dataset to article and back again – Data posted on Mendeley Data can continue to form the basis of full research articles. In the case of Elsevier journals, datasets from Mendeley Data will be peer-reviewed along with their parent article, creating a more rigorous and inclusive publication process. Subsequently, posted datasets will feature links to any published articles which they have informed, regardless of publisher. This approach is convenient, transparent and enriches the overall research process.

Share easily and securely – Guidelines governing submissions to the Mendeley Data have been kept as open as possible, although all content must be academic in nature. Users can privately share their data with colleagues, representatives of funding bodies, or anyone else who might prove useful in moving their work forward. They have full control over who can see and download their research data and are free to add and remove collaborators as their sharing needs change. The licensing schema associated with Mendeley Data are as follows –

- CC0 1.0
- CC BY 4.0 (Creative Commons Attribution 4.0 International)
- MIT (MIT License)
- Apache-2.0 (Apache License 2.0)
- BSD 3-clause (BSD 3-Clause ('Revised') License)
- BSD 2-clause (BSD 2-Clause ('Simplified') License)</option>
- GPLv3 (GNU Public License Version 3)
- CC BY NC 3.0 (Attribution-Non Commercial 3.0 Unported)

About Research Data

Over the last two decades the print library has become the digital library, while the models which govern research access have multiplied and evolved. The data underpinning research articles – facts and statistics gathered for further reference or analysis, the output of a measurement device, data from social surveys, digital scans, etc. – is rapidly becoming as important as the articles themselves. Researchers are increasingly demanding access to research data to build on the results of their own work or that of others, or as a potential starting point for further collaboration. At the same time, funding bodies are revising their policies to encourage – or even mandate – researchers to make their research data available.
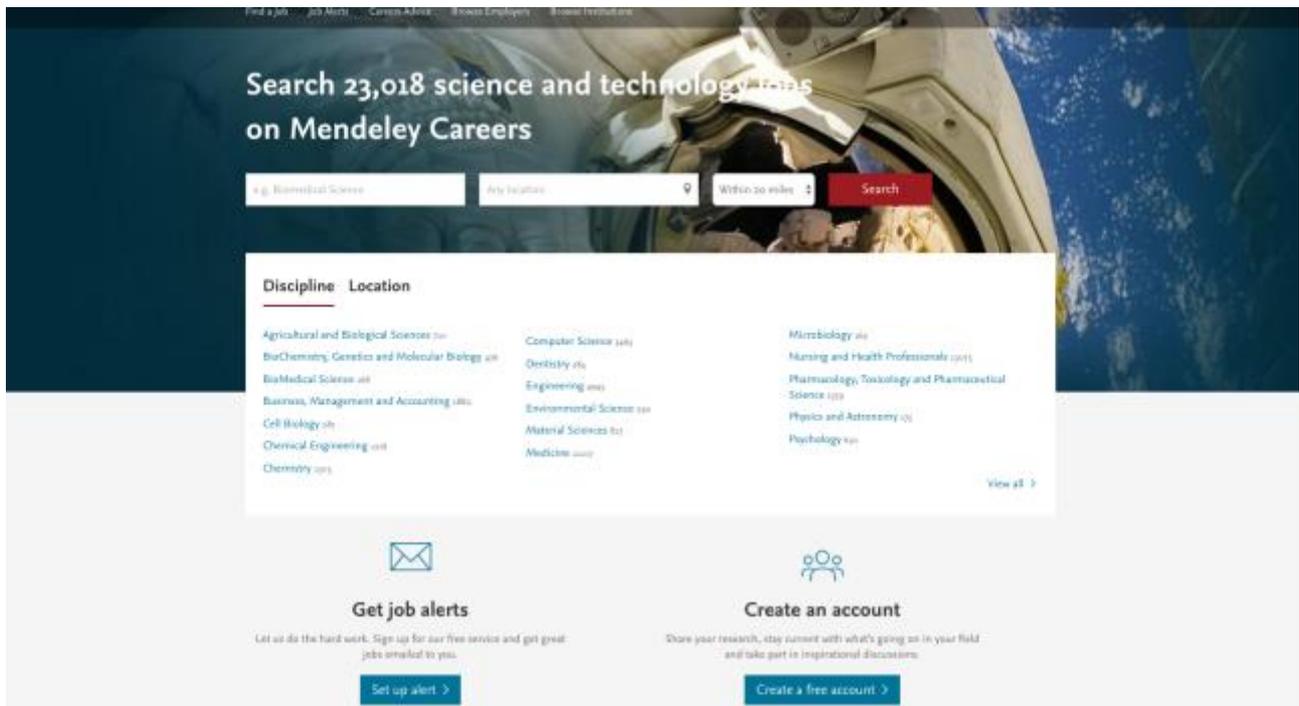
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§ https://www.force11.org/group/joint-declaration-data-citation-principles-final

Links & additional resources

- Mendeley Data is at: http://data.mendeley.com/
- The Force 11 Data Citation Principles can be found at: https://www.force11.org/group/joint-declaration-data-citation-principles-finalhttps://www.force11.org/group/joint-declaration-data-citation-principles-final

Mendeley Careers

Finding the right job is important to build your expertise, further your research and get the exposure you need to develop your career. And job listings are not always about finding your next position, but keeping up-to-date in your field, or across disciplines.

Mendeley Careers service, which selects thousands of relevant science and technology job postings from the leading job boards, academic institutions, company employers, and recruitment agencies across the world.

You will be able to search and apply for your next position on Mendeley. Sign up for email alerts tailored to your search criteria, and upload your resume to let recruiters and jobs come to you.

Mendeley Careers will also offer guides and resources to help you with your job search and to develop your career further.

Mendeley Careers is available on https://www.mendeley.com/careers/

Mendeley Institutional Edition (MIE)

Mendeley Institutional Edition (MIE) is a version of Mendeley designed for purchase and use on an institutional basis. By purchasing an MIE license, a university or school provides premium access for all its researchers, along with an added layer of functionality intended to provide valuable usage data and analytics to the institution's library team.

MIE is sold by Elsevier and is often used in conjunction with other key Elsevier products, such as Scopus and Science Direct.

Benefits of MIE

In addition to all the features accessible to regular Mendeley users, MIE also offers several key benefits:

Institution-wide access to premium features

To empower all of your researchers with more productivity and collaboration power. See below the comparison chart between Mendeley Free and Mendeley Institutional Edition

	Mendeley Free	Mendeley Institutional Edition
Features for Researchers		
Cite and Reference	Yes	Yes
Read and Annotate	Yes	Yes
Mendeley Suggest	Yes	Yes
Researcher Profile and Stats	Yes	Yes
Career Portal	Yes	Yes
Data repository	Yes	Yes
Personal Library storage space	2GB	5GB
Shared Library storage space	100MB	20GB
# Private groups	5	Unlimited
Private group size	25	100
Features for Institutions		
Premium institution-wide collaboration features	No	Yes
Institutional Homepage	No	Yes
Usage Analytics	No	Yes
Content consumption Analytics	No	Yes

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Link resolver integration	No	Yes
Alumni Policy	No	Yes
Customer Support Service	Via Online only	Through Elsevier OSCS and Online, 24/5

Institutional Page with Insights for librarians

to enable librarians to better administer and support their institutional information objectives and the researchers needs.

Mendeley provides Analytics to MIE customers in the form of the Analytical Dashboard in the with Mendeley Web and a Monthly MIE report in HTML (with downloadable data) sent to the owner of schools Institutional Page
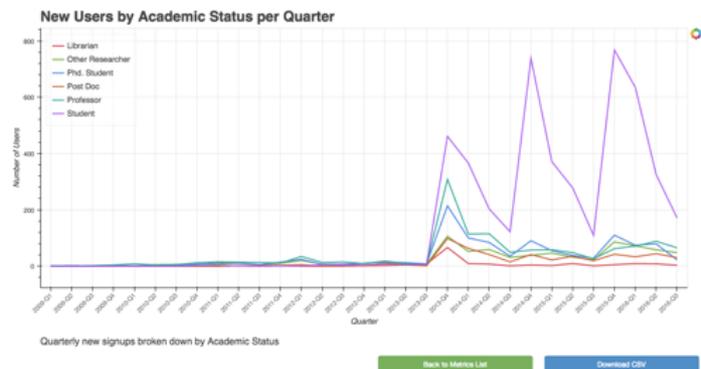

The data dashboard tracks which journals are being read the most by the institution's faculty and students, allowing their library to optimize their subscriptions – meaning, they can cancel journals that are not getting used, and subscribe to journals which are popular, but not yet provided by the library. This enables librarians to get more value out of resources and provide a stronger service to their researchers.

Moreover, the MIE data dashboard tracks the faculty's publications: In which journals are they publishing, and how much impact – measured in global readership – do these publications have? This helps institutions gather information for research excellence assessments and other reports, as well as highlighting to them who their current and future star researchers are.

Check the tables below for more in-depth details about the metrics and insights provided

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Report	Category	Metric	Use case
Web Analytics	Content	**Top Journals**	*Understanding what Mendeley Members are reading can help in future journal and collection purposes*
		Highly read articles	
Monthly Report	Population	**Total current users with institutional email address and in MIE group**	*You can use growth analytics to justify cost per user and ROI on you Institution's MIE investment.*
	Acquisition	**New users per month** (last 6 months)	
		New users per quarter (all time)	
	Demographics	**Users by academic status**	*By monitoring monthly Growth, Discipline and Status you can also understand the effectiveness of internal marketing activities such as training and e-mail campaigns*
		Users by academic status by quarter	

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Report	Category	Metric	Use case
Web analytics **Monthly Report**	Groups	**Groups joined by members** (all time, year, month & week)	*With MIE, you will be able to gauge the collaboration efforts of your researchers. These statistics allow you to see how socially active your Mendeley population is and what they are using Mendeley for.*
		Total Current Groups created	
		Number of groups created and joined by quarter	
	Engagement	**Number of groups joined**	
		Group actions (posts, likes, documents added, comments)	
		Number of users in group	
		Number of private groups by Member count (Including Owner)	

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Alumni Policy

to grant to the Alumni from a subscribing institution the right to access of 12 months of the same premium access according to the terms and conditions of that Policy.

Support promoting Mendeley and training users at your Institution

Mendeley provides online training and user adoption roll out programs customized to your needs, including train-the-trainer sessions.

24/5 priority global customer support

Users and institutions get priority access to Mendeley's first level support 24 hours Monday to Friday.

For more details, please see www.elsevier.com/solutions/mendeley/Mendeley-Institutional-Edition.

MIE and Librarian Certification

As part of the Level 3 reward, certified librarians are entitled to 500 free premium upgrades for use at your institution[**].

BENEFIT	Librarian Certification Reward	Paid for version (Mendeley Institutional Edition)
Number of premium upgrades	500 users (12 months only)	Unlimited users
Number of private groups	Unlimited (Down to 5 after 12 months)	Unlimited
Number of collaborators per group	Up to 50 (Down to 25 after 12 months)	Up to 100
Individual storage space	5 GB (Down to 2GB after 12 months)	100 GB
Group storage space	5 GB (Down to 100 MB after 12 months)	100 GB

This benefit can be exchanged for a significant discount on an MIE purchase. Please contact certificationprogram@mendeley.com if you are interested in this deal.

[**] Limited to 1 librarian per institution, although multiple librarians can contribute to the level 3 assessment.

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