# Reference Management- Mendeley

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# Reference Management

Many researchers perceive reference management as tedious and time-consuming, especially when done manually. Reference management tools help scholars create and manage their lists of references for research projects. Most of these tools organize citations into specific formats in manuscripts and bibliographies. Many search tools provide ways to download references into reference management software.

These software programs enable the digitalization of personal collections of relevant scholarly publications. The earliest reference storage programs that place references in manuscripts have been around for over 25 years (including Endnote and the BibTeX/LaTeX-based programs still popular today), but each individual citation entry had to be typed by hand.

# Reference Management

Current reference management software help researchers find relevant literature, permit storage of papers and their bibliographic metadata in personal databases for later retrieval, and allow researchers to insert citations and references in a chosen citation style.

A variety of software available online provide tools for managing references; some of them need to be purchased like EndNote, but free software such as Mendeley and Zotero are also available.

Mendeley allows the researcher to collect, manage, share, and use references found during the process of the research. It can be used with Word to add citations and produce a reference list in a document. Mendeley has a storage capacity of 2 GB, but more space can be purchased. In this guide, we show the versatility of this software to the researcher and how to manage references.

# Reference Management

## 1. Software Installation

First, to download Mendeley, go the main page of the software (provided by Elsevier) by clicking this link:

https://www.mendeley.com

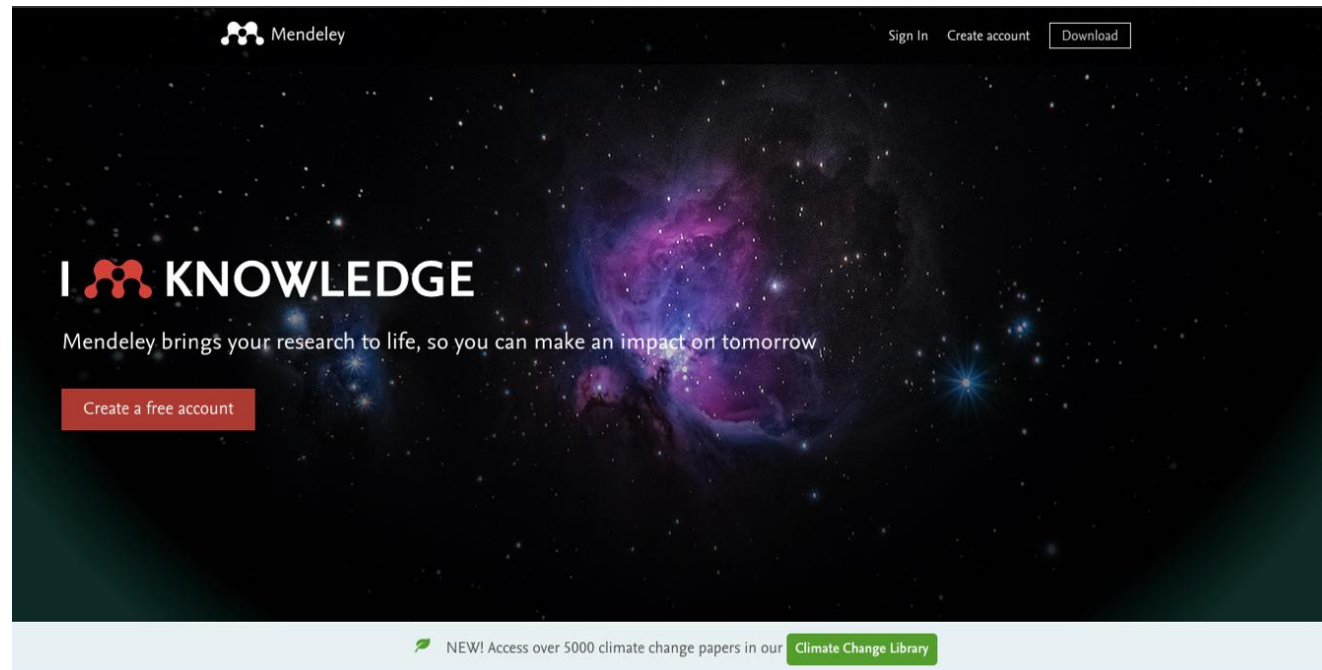Figure 1 shows the current Mendeley homepage



**Figure 1**. Home page of Mendeley

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An account must be created in order to download the software, so click on the "Create a Free Account" button. To register, provide the requested email account and a password. Fig. 2 displays the windows of the registration process. The first two windows ask for personal information; after the registration is successful, Mendeley asks your role or position and your field of study (optional). Subsequently, click on the "Continue to Mendeley" button.
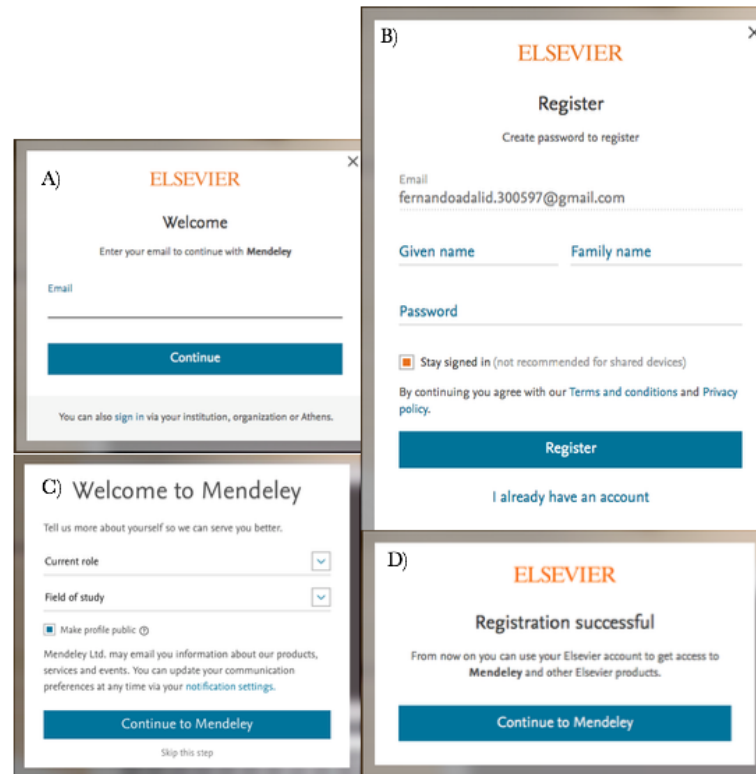


**Figure 2**. Elsevier's registration to Mendeley.

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After the registration process is completed, you are redirected to the download page for the Mendeley Reference Manager (as shown in Figure 3).
Click on the red "Get Reference Manager" button to start the download. Mendeley offers the app for a variety of iOS and Android devices, but in this guide, we discuss downloading to the macOS desktop.
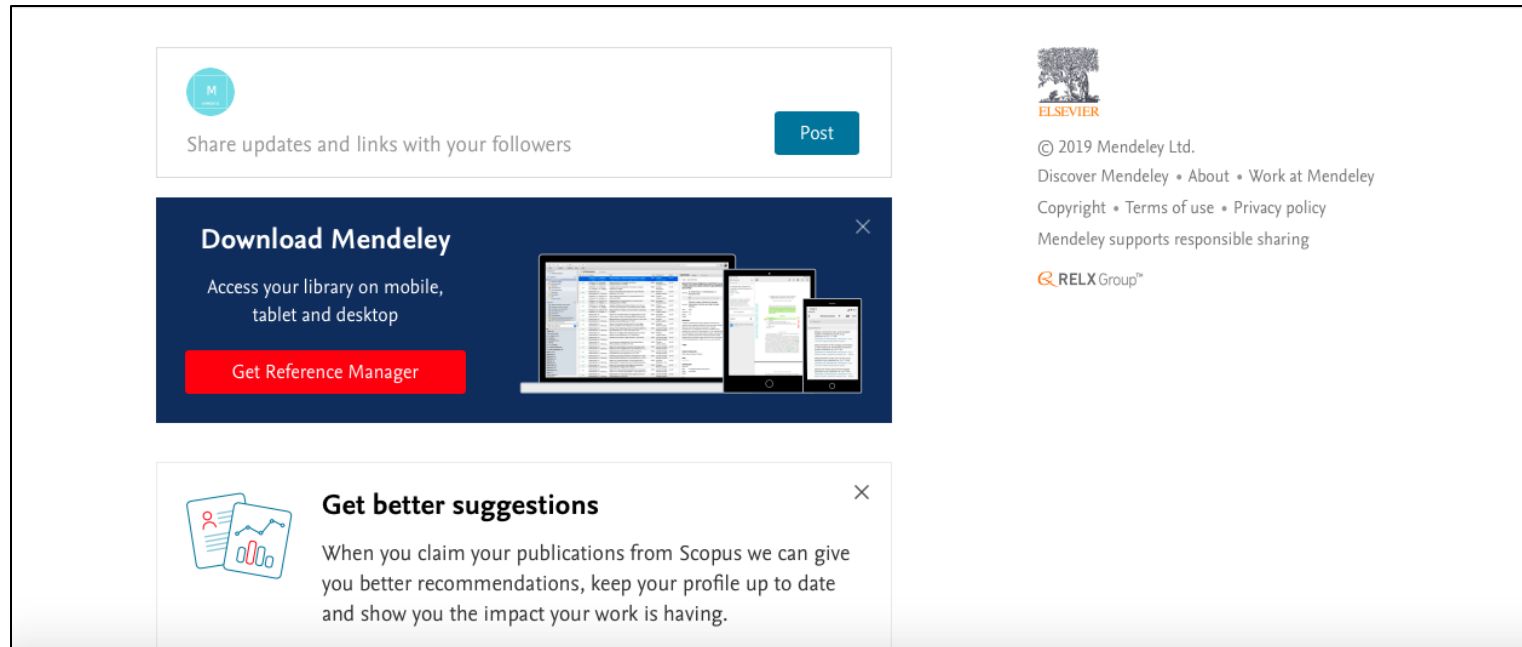


**Figure 3.** Mendeley Download Reference Manager page.

# Reference Management

After clicking the red button, Mendeley automatically detects the version of your operating system. Click on the "Download Mendeley Desktop for macOS" button. (Note in Figure 4, below, the selection options for Windows and Linux desktops.)
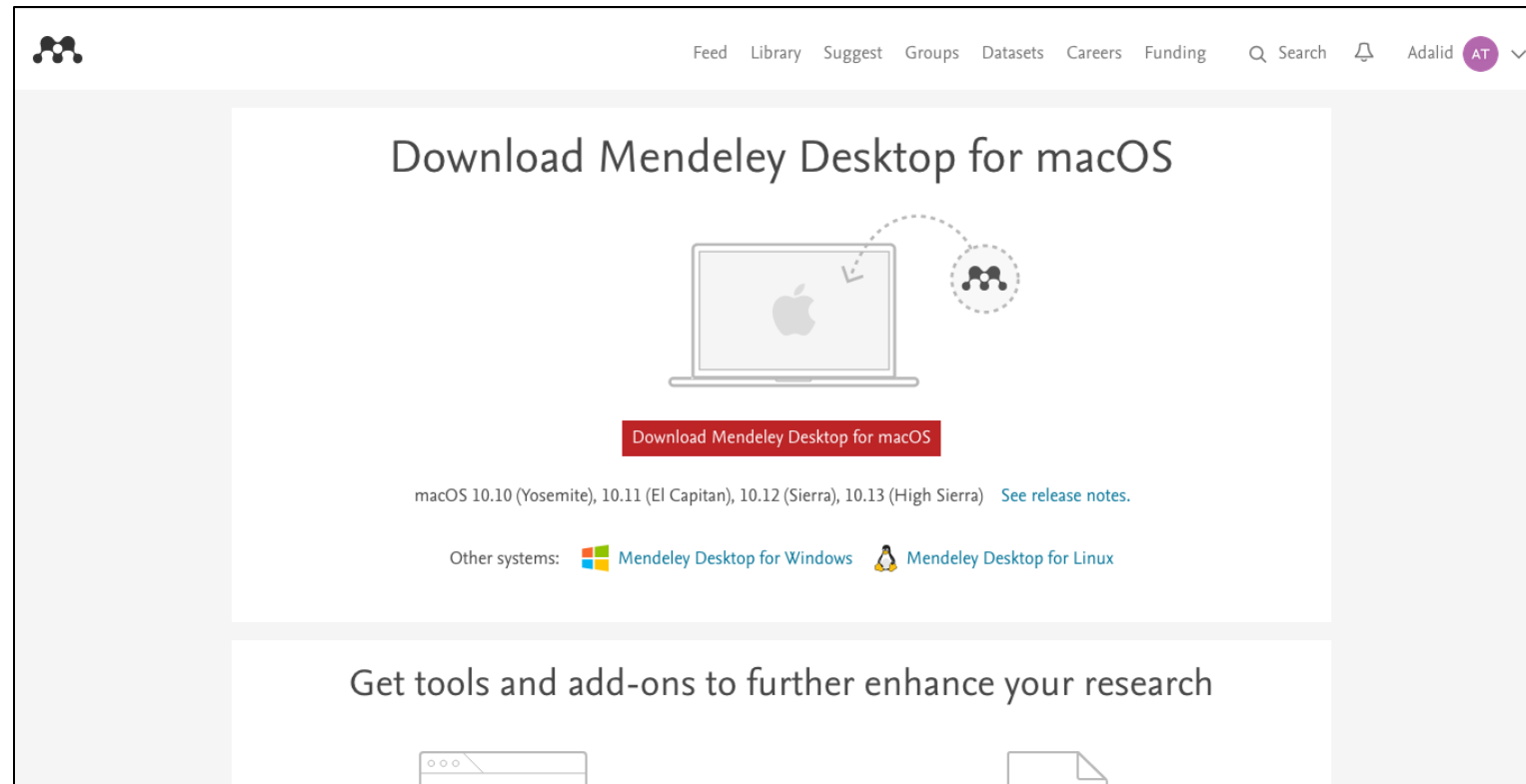


**Figure 4**. Mendeley Download page for macOS Desktop.

# Reference Management

The installation of the software requires signing in with the password and email you created (Figure 5), which is fast and should not cause any problems.
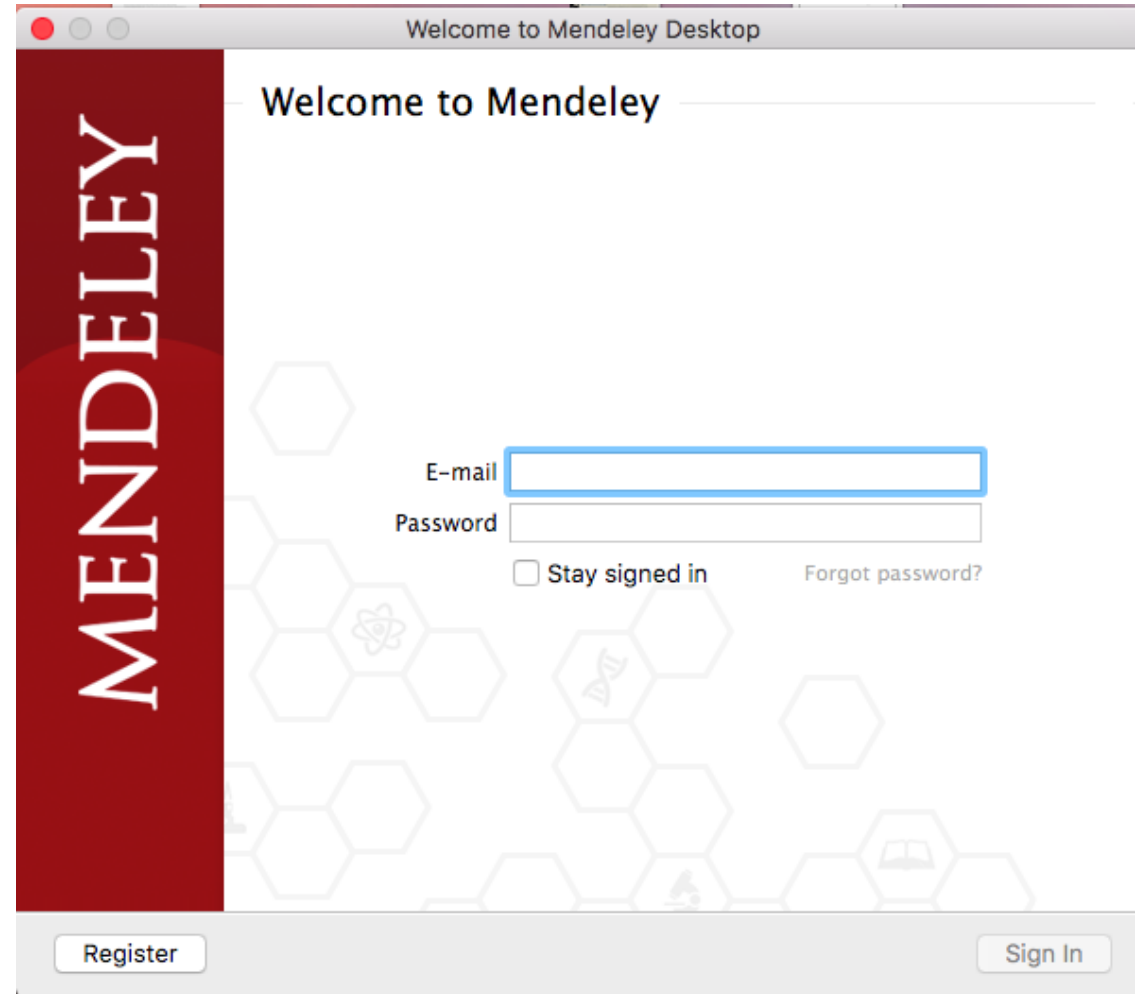


**Figure 5**. Mendeley installation sign-in page.

# Reference Management

After the installation is completed, the Mendeley application resides in the folder you specified. In this example, the software is in the "Applications" folder (see Figure 6).
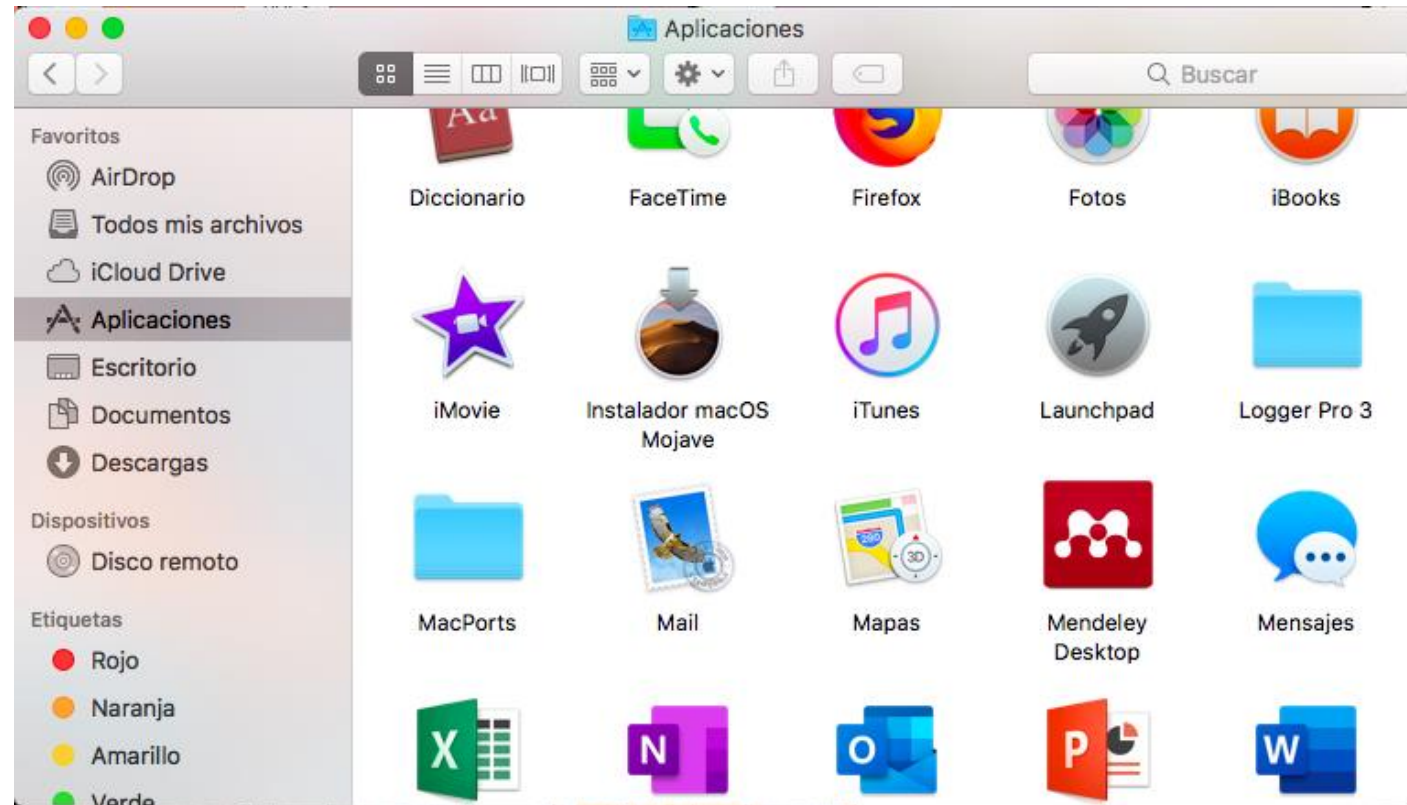


**Figure 6**. Location of Mendeley in the Applications folder.

# Reference Management

Locate the application in the folder and click on the Mendeley icon to open it. The Mendeley Desktop displays (Figure 7).
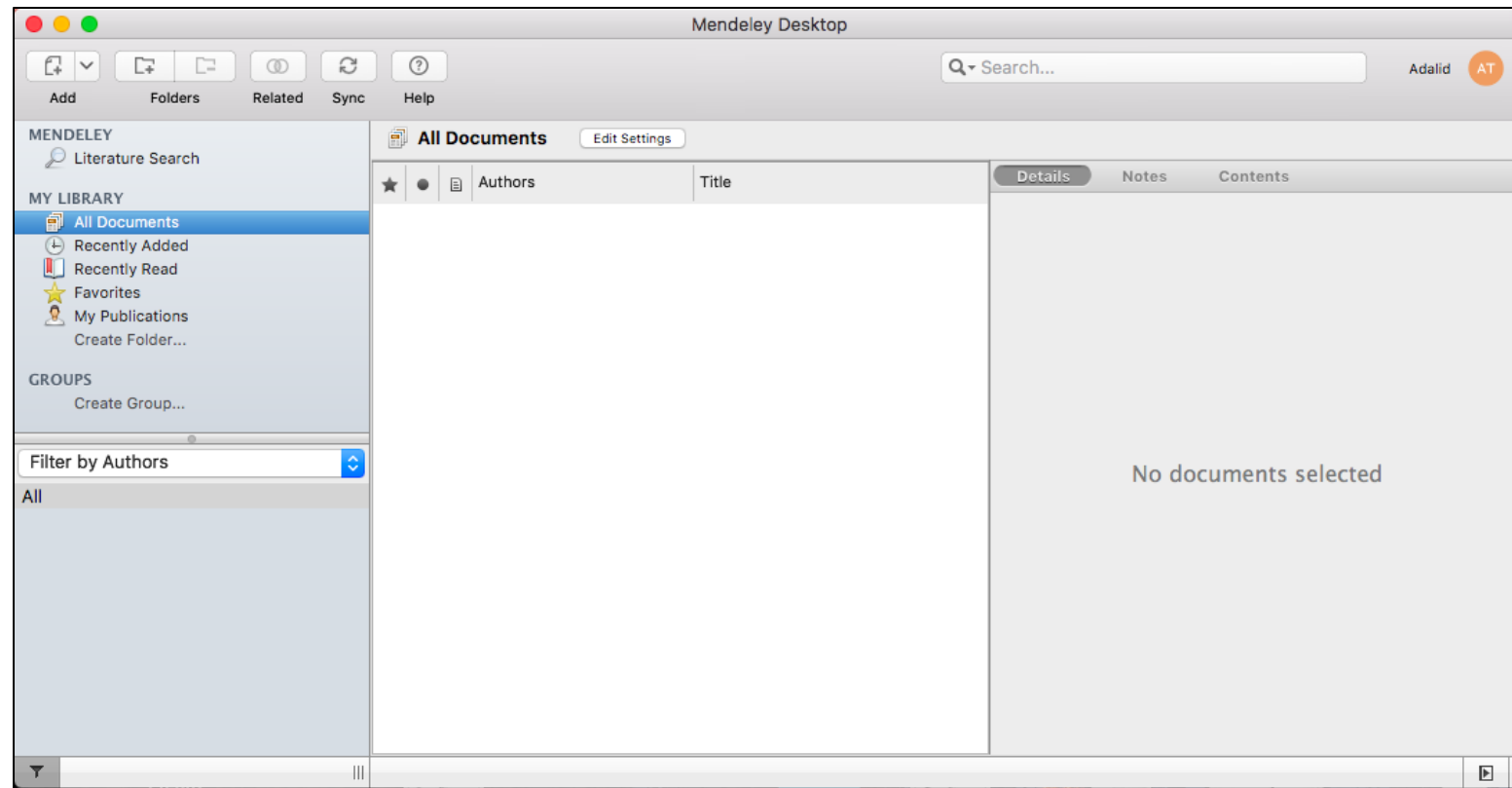


**Figure 7**. Mendeley Desktop page. .

# Reference Management

Upon opening the program the first time (as shown in Figure 8), you will see a short introduction to Mendeley.
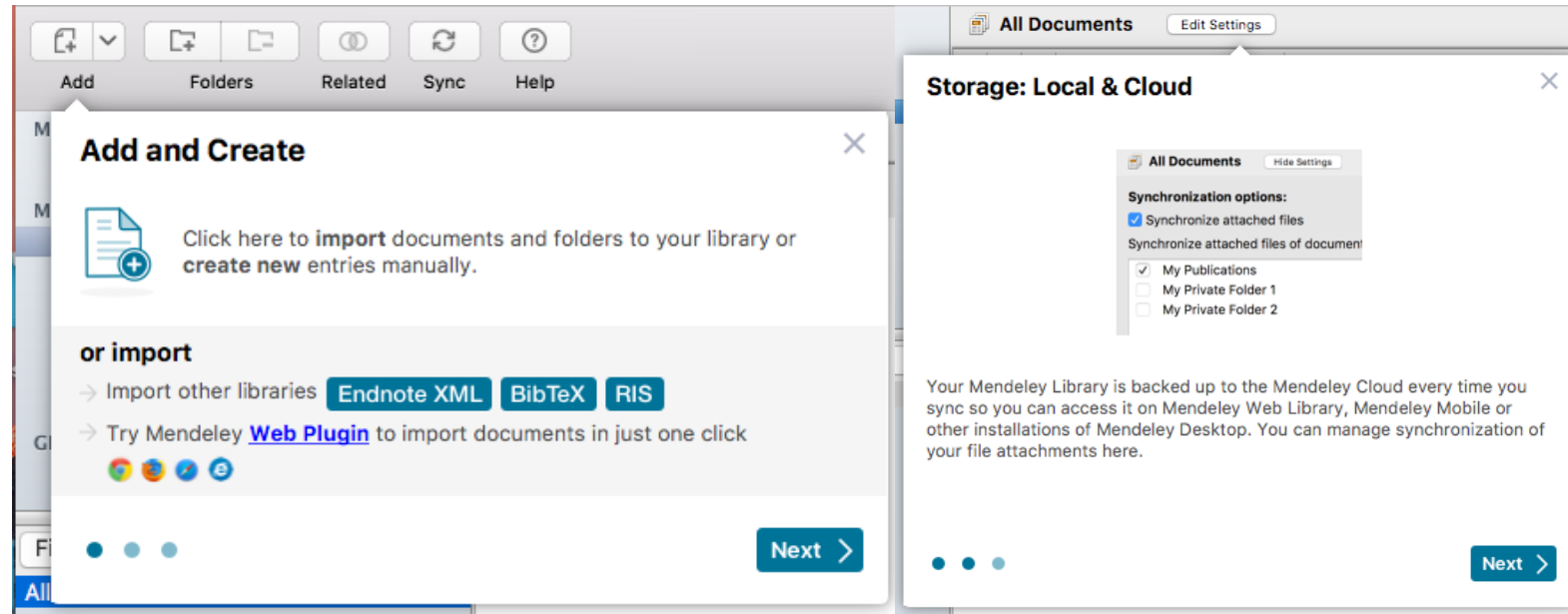


**Figura 8**. Mendeley introduction.

# Reference Management

One of the features of Mendeley is the import tool, allowing documents to be imported from your computer library, including the ones from web searches. To use this feature, you need to install the Mendeley Web Importer tool, found in the dropdown box of the Tools tab on the Mendeley Desktop bar at the top of the page. Click on "Install Web Importer," as shown in Figure 9.
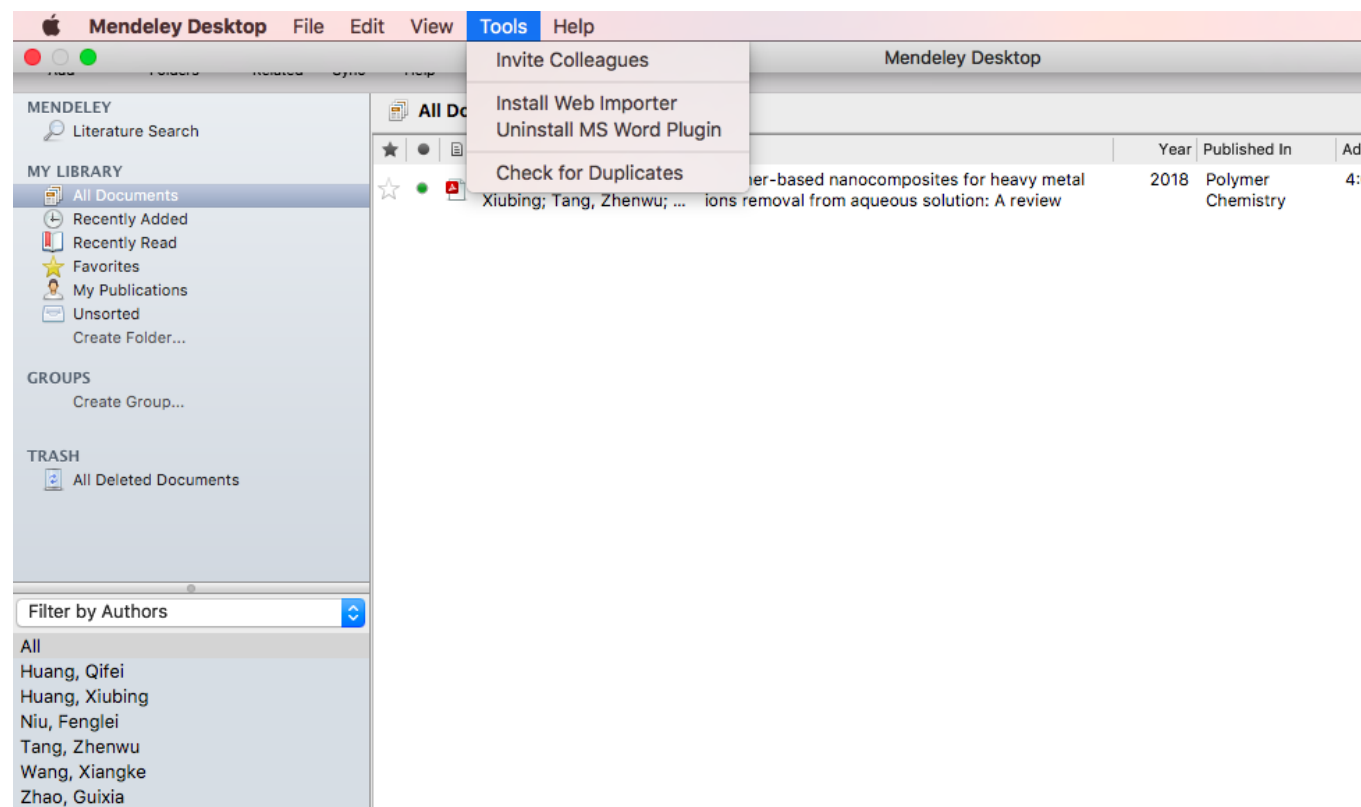


**Figure 9**. Installation of Web Importer

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In the next window (see Figure 10), the Citation Plugin for Microsoft Word must also be installed in order to cite the Mendeley references in Word.
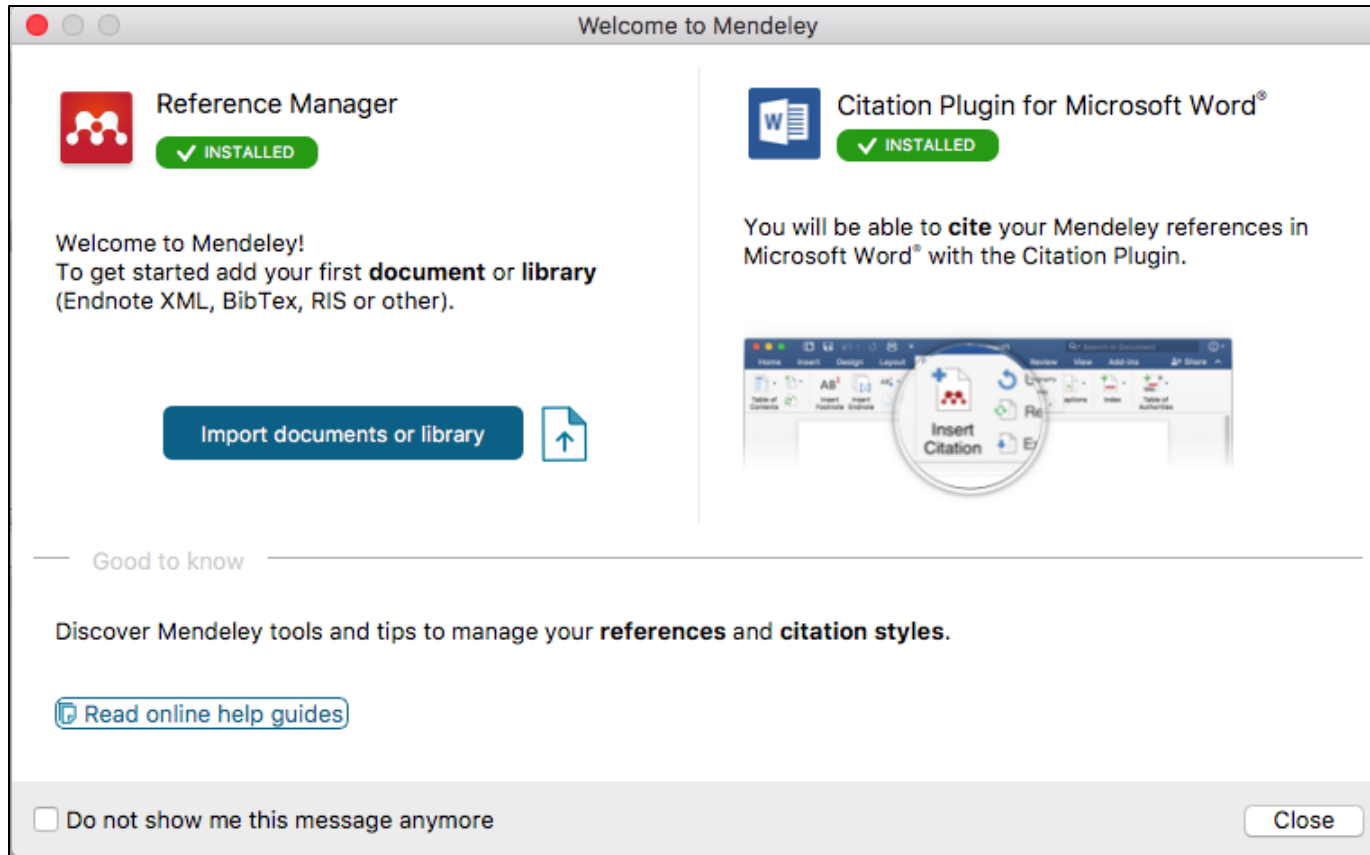


**Figure 10**. Installation of Web Importer and the Citation Plugin for Word.

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Depending on the browser, the process of installing Web Importer can be different. After the correct installation of the feature in Firefox and other browsers, there is an icon like the one shown in Figure 11.



**Figure 11**. Extension of Mendeley in Firefox.

Once the software is fully operational, documents can be imported from your computer library by Mendeley. The references added to your library may be organized according to the date of addition, but it is better to create folders for articles (see Fig. 12). To do this, locate the "My Library" section and then click on "Create Folder." Rename the new "Untitled Folder" according to your needs.
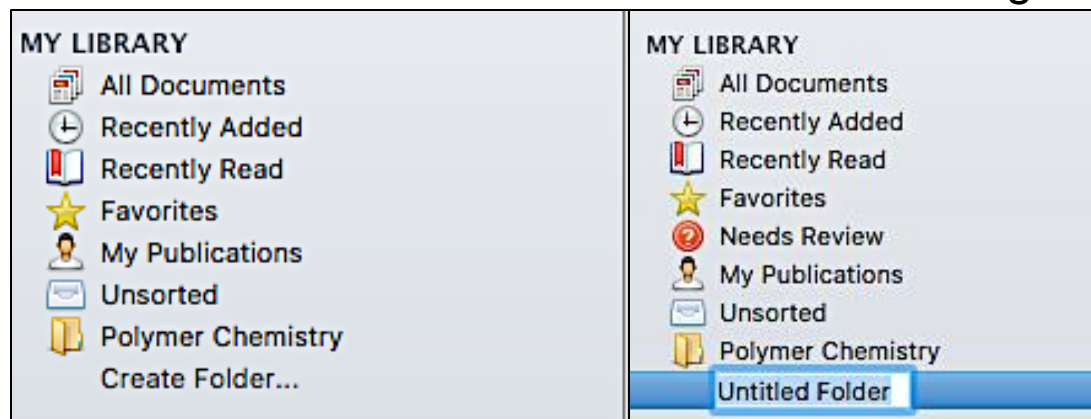


**Figure 12**. Creation of new folders.

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## 2. Mendeley Documents Import

The next steps show how to import documents from the computer to the Mendeley library. Click on the "Add" button located on the top left corner of the Mendeley Desktop, as shown in Figure 13.
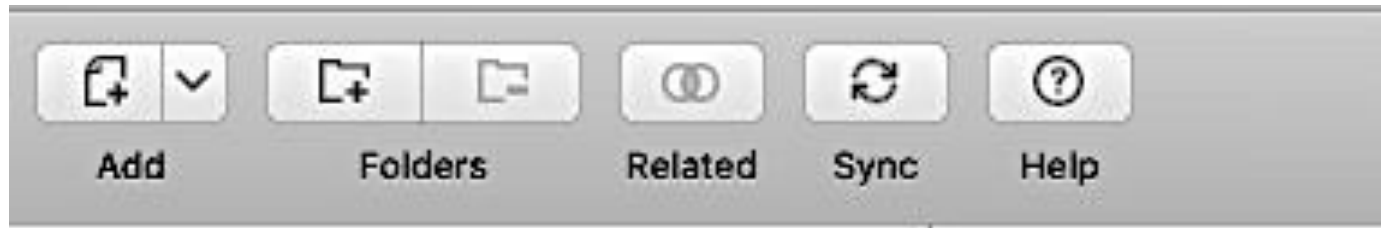


**Figure 13**. Adding documents to the library.

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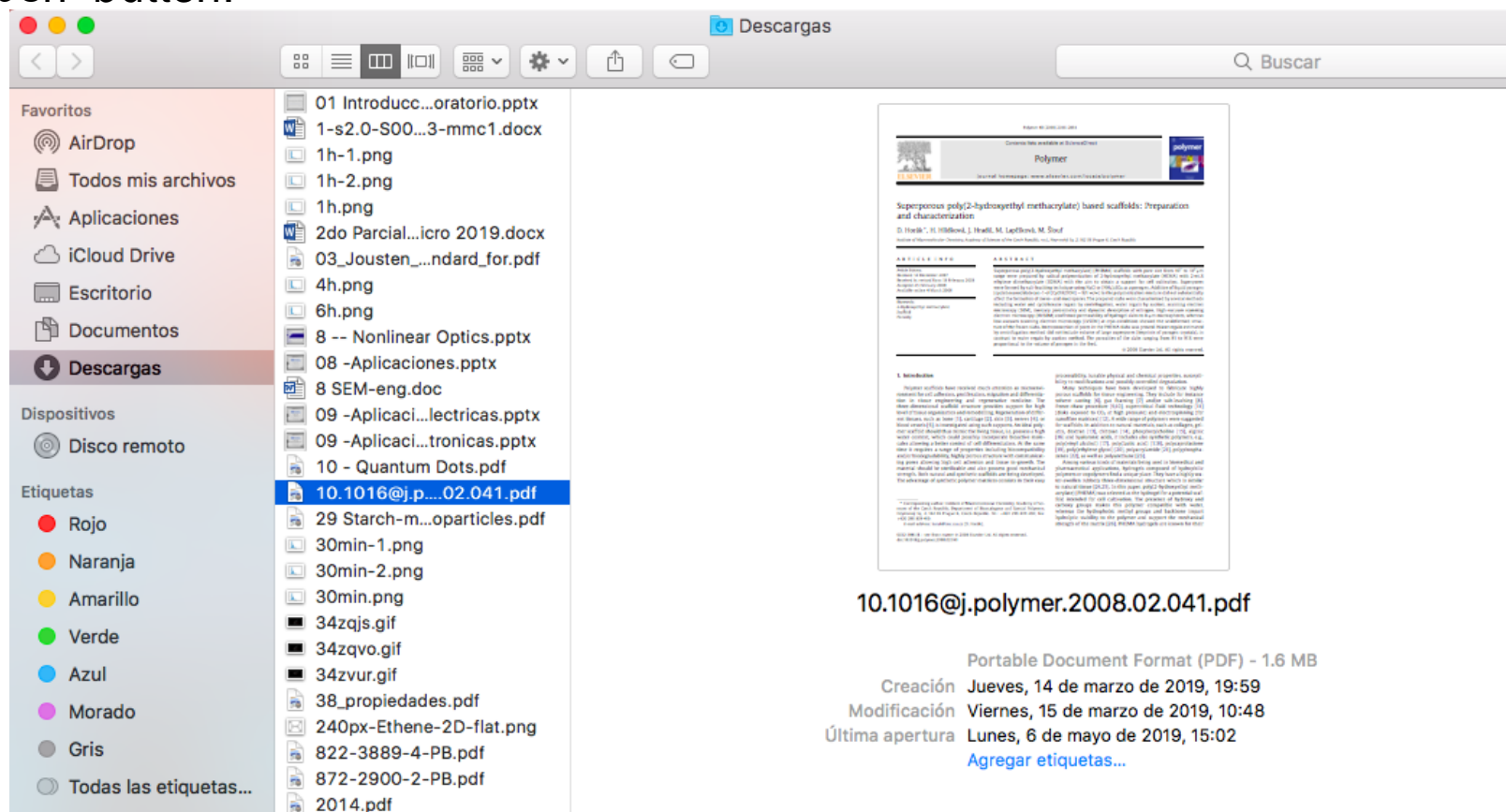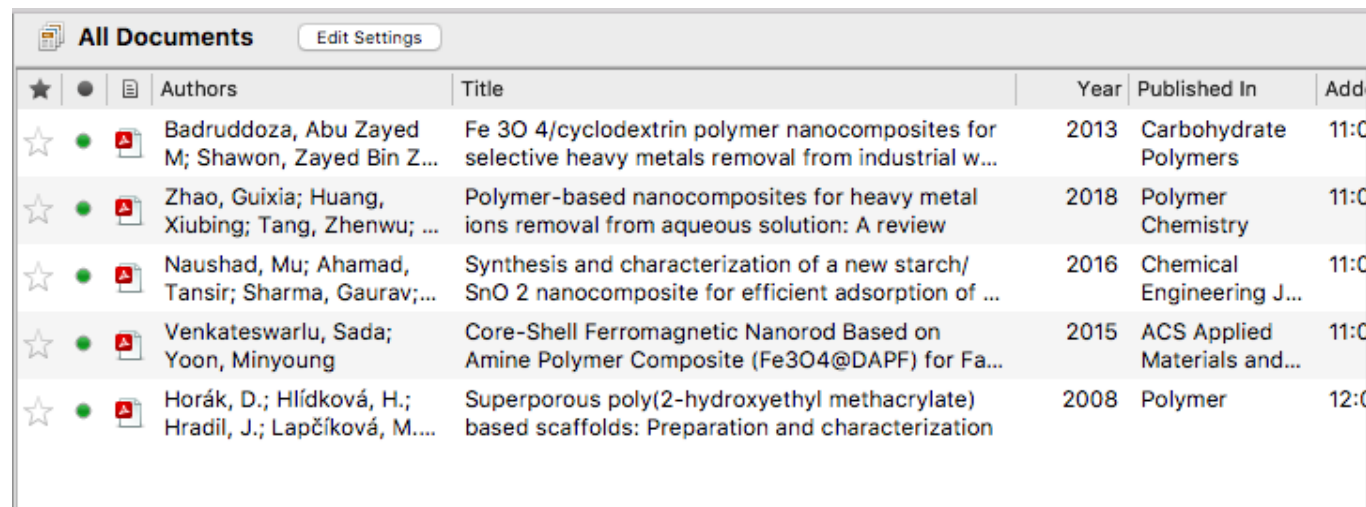In the new window displaying the directory (Figure 14), find the document that you want to export from your computer to Mendeley and then click on the "Open" button.



**Figure 14**. Selecting articles for the Mendeley import.

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After uploading your document, your Mendeley library will be updated, and the imported document will appear in the "All Documents" section (Figure 15). By clicking on a document that Mendeley shows, you can see additional information about it (see Figure 16). When you add the document PDF, Mendeley usually analyses the document and automatically extracts the information necessary for references. This information is displayed in the right-side panel next to the PDF; if not correct, it can be edited, which Mendeley automatically informs you.



**Figure 15**. Documents imported by Mendeley, as shown in the Library.

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You can also add other file types such as Word documents or PowerPoint presentations.



**Figure 16**. Additional information provided by Mendeley.

## 3. Using Web Importer

Web Importer allows the importation of documents from searches of internet sites; it can import more than one document at once.

In order to use the Web Importer, open your internet browser. As an example, we show a Google Scholar search of "Adsorption on Polymers." Google Scholar will provide a lot of article search results, as shown in Figure 17.
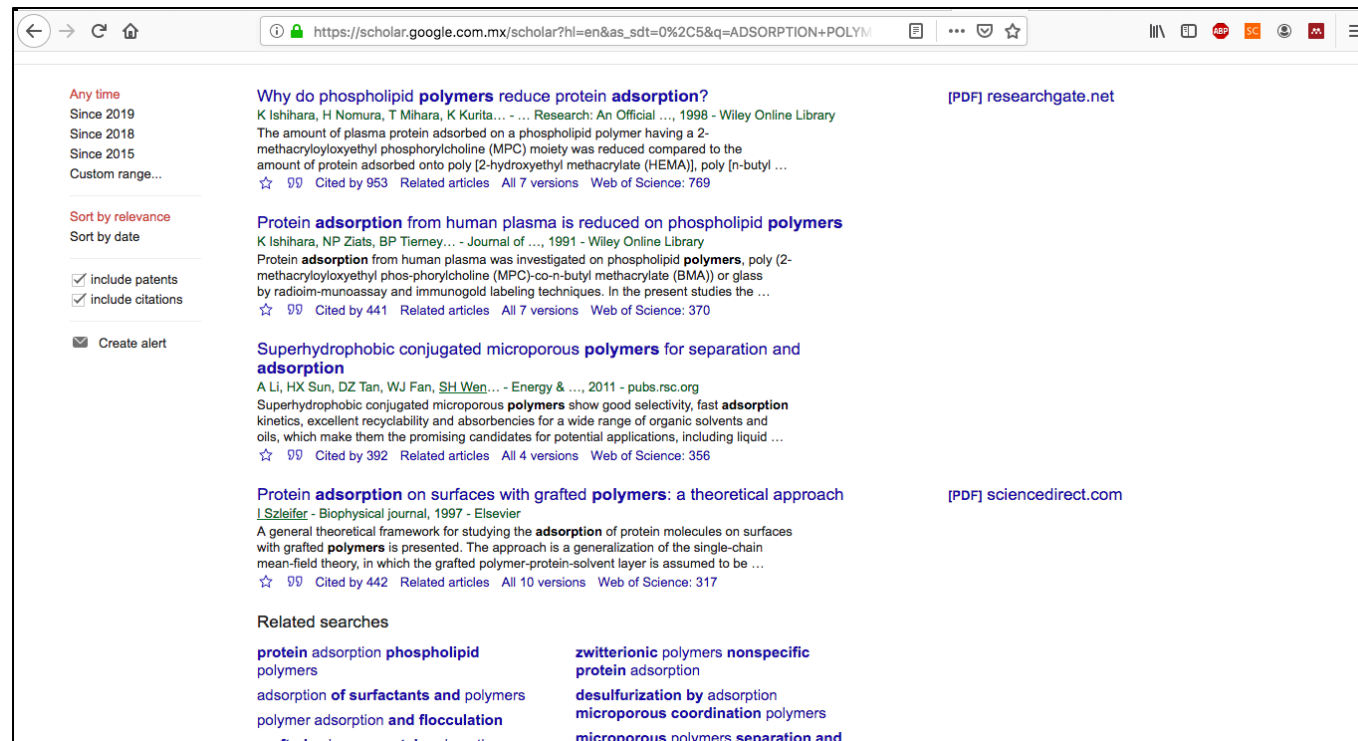


**Figure 17**. Web search using Google Scholar.

# Reference Management

To import documents into Mendeley from the web, click on the Mendeley extension in your browser. A window displays the documents of the search results so it can be decided which references to import (Figure 18).
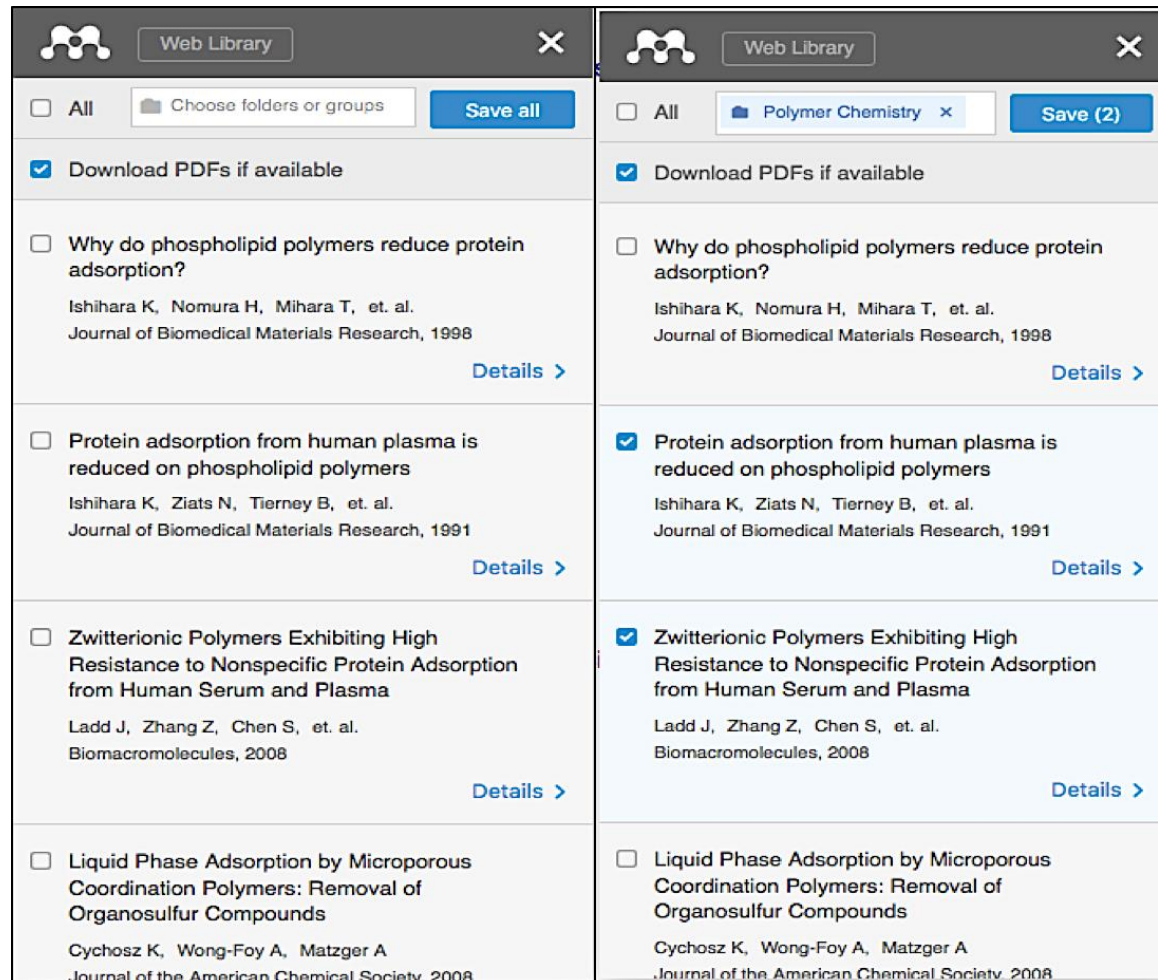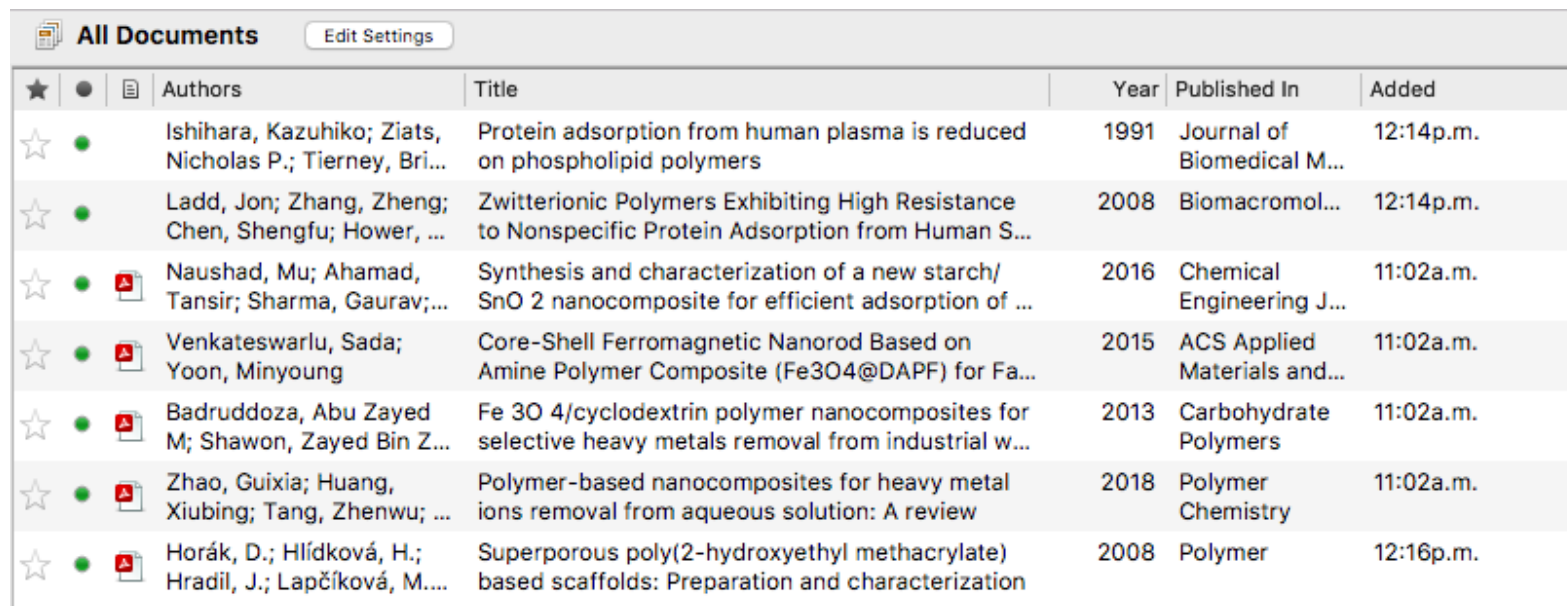


**Figure 18**. Web Importer window showing documents available to import.

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Mendeley gives you the option of downloading the PDF of the article if it is available. You can choose the destination folder where you want to save your references in Mendeley. If you do not choose a folder, your references will be uploaded as a default to the "All Documents" section. After selecting your references to import, click on "Save All."

You can verify the addition of your references by looking at your Mendeley library and your folders; to confirm, sort your references by date (see Figure 19).



**Figure 19**. Library updated with references added from Web Importer.

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## 4. Citations in Word

Now we provide an example of how Mendeley manages references and helps in the citing of the references. Suppose we have the following text which lacks citations:

> "Currently, adsorption techniques have been considered as the most viable group of techniques. However, adsorbents have a severe adsorption capacity or slow kinetics. Due to its high surface area and adsorption capacity, nanomaterials such as magnetite, $Fe_3O_4$, have been a research source for wastewater treatment.
>
> However, $Fe_3O_4$ nanoparticles have the drawback of being unstable due to their easy oxidation, so a surface modification is required in order to protect the particles. One of the methods for modifying the surface is the formation of a coating of particles around the nanoparticle."

In Microsoft Word, the following bar is displayed:
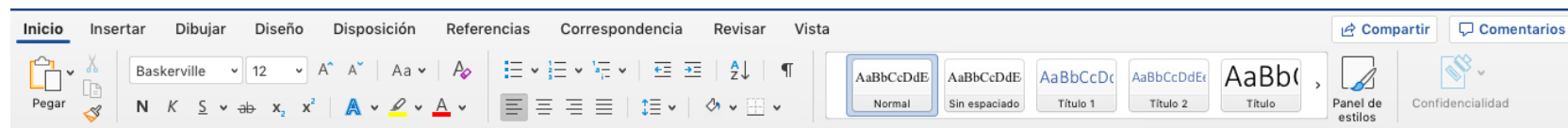


**Figure 20**. Toolbar of Microsoft Word

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The Mendeley extension is located on the "Reference/Referencias" tab; click on this tab to find the installed Mendeley icons that offer options (see Figure 21).



**Figure 21**. Mendeley tools for citations in Microsoft Word.

Mendeley allows you to select the style of citation you need; there are a number of styles included in the Style selection field, from APA to IEE.

# Reference Management

Back to our sample text, suppose that references are needed on the following lines (see yellow place holders).

> "Currently, adsorption techniques have been considered as the most viable group of techniques. However, adsorbents have a severe adsorption capacity or slow kinetics. Due to its high surface area and adsorption capacity, nanomaterials such as magnetite, $Fe_3O_4$, have been a research source for wastewater treatment [REF].
> However, $Fe_3O_4$ nanoparticles have the drawback of being unstable due to their easy oxidation, so a surface modification is required in order to protect the particles. One of the methods for modifying the surface is the formation of a coating of particles around the nanoparticle [REF]."

First, click on the space where you want your reference to be inserted; then, from the options displayed on the Mendeley extension, click on "Insert or Edit Citation" (Figure 21).

# Reference Management

The Mendeley Citation Editor window appears; enter the proper information for the reference (Figure 22).
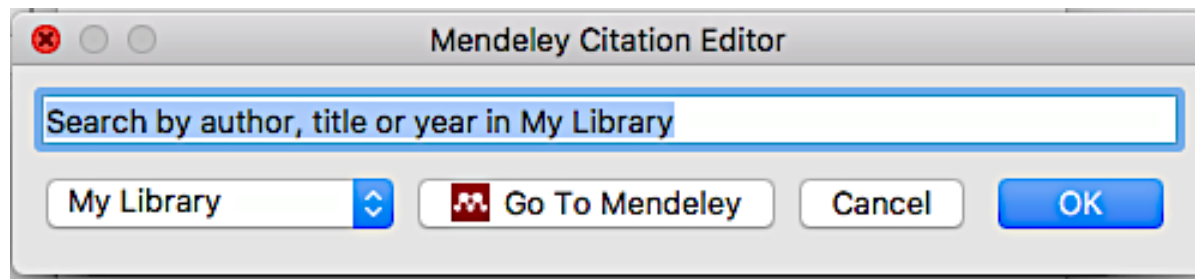


**Figure 22**. Window for reference editing or insertion.

As Figure 22 shows, you can search for your reference by typing the author, title, or year of the publication available in your library. Figure 23 shows the different ways of searching for your reference.
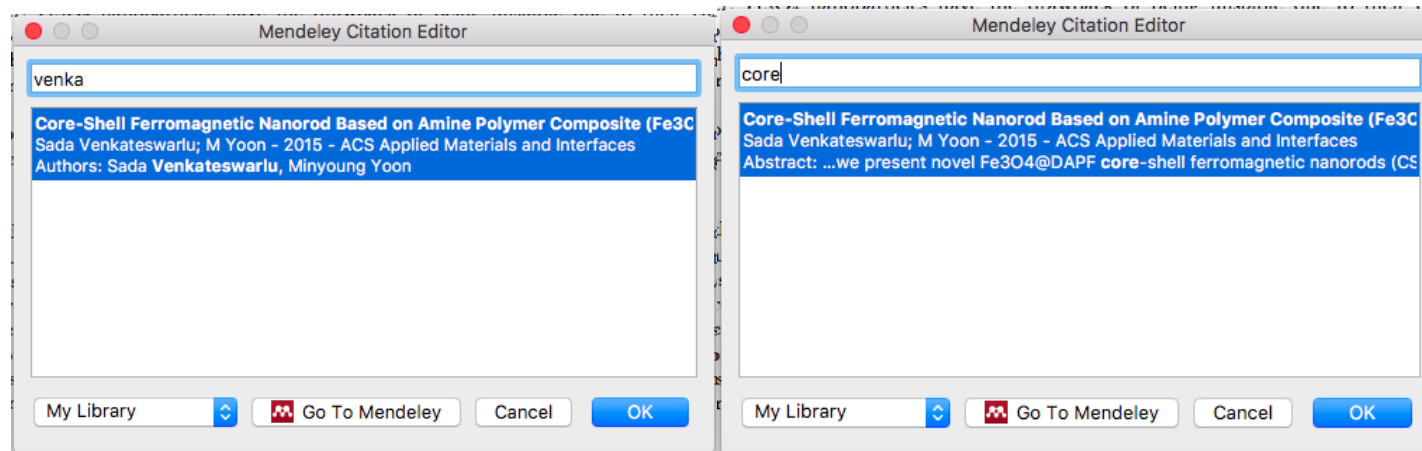


**Figure 23**. Different ways of searching for a citation; in this example, by the author and title.

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Select the reference you wish to cite and click the "Ok" button. The Citation Editor window (Figure 22) again appears to allow the addition of a second reference to be cited; if you have no other references to cite, click on "Ok." Mendeley will create the citation, and it will appear in your document. In our sample article, we show the addition of the references (below).

"Currently, adsorption techniques have been considered as the most viable group of techniques. However, adsorbents have a severe adsorption capacity or slow kinetics. Due to its high surface area and adsorption capacity, nanomaterials such as magnetite, $Fe_3O_4$, have been a research source for wastewater treatment (Zhao et al., 2018).

However, $Fe_3O_4$ nanoparticles have the drawback of being unstable due to their easy oxidation, so a surface modification is required in order to protect the particles. One of the methods for modifying the surface is the formation of a coating of particles around the nanoparticle (Naushad et al., 2016)."

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You can change the citation style by going to the Mendeley toolbar in Word and clicking on Style (Figure 24). A dropdown list of available citation styles will display.



**Figure 24**. Changing the Citation Style.

# Reference Management

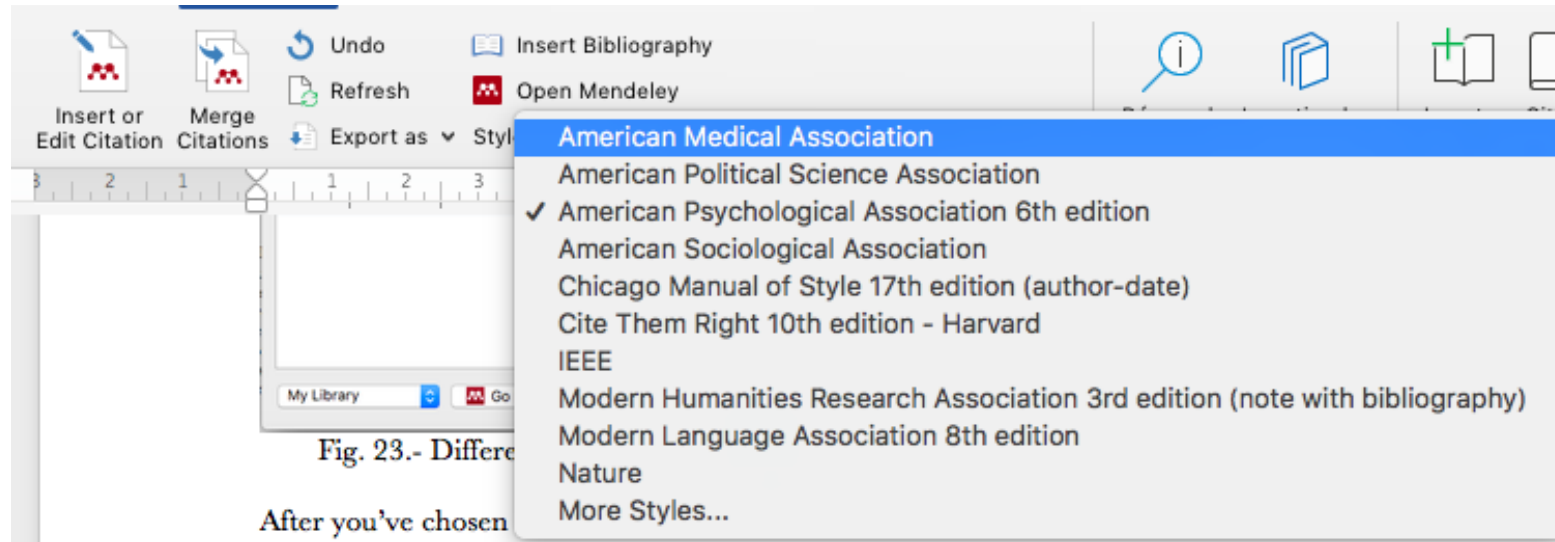Click on the style you want and then confirm that the style of citation in your document changed automatically (see Figure 25).

A) "Currently, adsorption techniques have been considered as the most viable group of techniques. However, adsorbents have a severe adsorption capacity or slow kinetics. Due to its high surface area and adsorption capacity, nanomaterials such as magnetite, $Fe_3O_4$, have been a research source for wastewater treatment [1].
However, $Fe_3O_4$ nanoparticles have the drawback of being unstable due to their easy oxidation, so a surface modification is required in order to protect the particles. One of the methods for modifying the surface is the formation of a coating of particles around the nanoparticle [2]."

B) "Currently, adsorption techniques have been considered as the most viable group of techniques. However, adsorbents have a severe adsorption capacity or slow kinetics. Due to its high surface area and adsorption capacity, nanomaterials such as magnetite, $Fe_3O_4$, have been a research source for wastewater treatment [1].
However, $Fe_3O_4$ nanoparticles have the drawback of being unstable due to their easy oxidation, so a surface modification is required in order to protect the particles. One of the methods for modifying the surface is the formation of a coating of particles around the nanoparticle [2]."

**Figure 25**. Example of changing the citation style: a) American Medical Association b) IEEE.

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Once you have completed your document and all your references are in your work, insert the bibliography by going to the Mendeley Tool Bar and clicking on the "Insert Bibliography" icon (Figure 21). Mendeley then creates the list of your references cited in your work in accordance with the style that you chose. The following is an example based on the text we have been using:

"Currently, adsorption techniques have been considered as the most viable group of techniques. However, adsorbents have a severe adsorption capacity or slow kinetics. Due to its high surface area and adsorption capacity, nanomaterials such as magnetite, $Fe_3O_4$, have been a research source for wastewater treatment (Zhao et al., 2018).

However, $Fe_3O_4$ nanoparticles have the drawback of being unstable due to their easy oxidation, so a surface modification is required in order to protect the particles. One of the methods for modifying the surface is the formation of a coating of particles around the nanoparticle (Naushad et al., 2016)."

References

Naushad, M., Ahamad, T., Sharma, G., Al-Muhtaseb, A. H., Albadarin, A. B., Alam, M. M., … Ghfar, A. A. (2016). Synthesis and characterization of a new starch/SnO 2 nanocomposite for efficient adsorption of toxic Hg 2+ metal ion. *Chemical Engineering Journal*, *300*, 306–316. https://doi.org/10.1016/j.cej.2016.04.084

Zhao, G., Huang, X., Tang, Z., Huang, Q., Niu, F., & Wang, X. (2018). Polymer-based nanocomposites for heavy metal ions removal from aqueous solution: A review. *Polymer Chemistry*, *9*(26), 3562–3582. https://doi.org/10.1039/c8py00484f

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