

**Mendeley Exercises**

You will complete exercises 1-6 as part of the workshop. There are three additional, optional exercises that highlight other Mendeley features you may be interested in.

***Exercise 1 - Create a folder***

1. Sign in to Mendeley Desktop
2. Click “Create Folder…”
3. Name the folder “Hinari”

***Exercise 2 -* Import a list of articles from a PubMed search into Mendeley:**

1. Run a search on a topic of your choice in Hinari Pubmed.
2. Check the box next to 4 articles. Click “Send to” dropdown, and add them to the clipboard.
3. Click on the link next to Clipboard, to open the clipboard. Once you are viewing the collection in the PubMed Clipboard, click the ‘Save to Mendeley’ bookmarklet. The Web Importer will load, you may be asked to “Sign in”.
4. Select the “Hinari” folder in the search box at the top of the page.
5. Then click ‘All’ to import all the articles to your Mendeley library.
	1. If you check the box “Download PDFs if available” Mendeley will download PDFs if they are freely available to anyone on the internet (this does not indicate whether or not you have access to the articles through Hinari). This may work for a few references, but likely not all of them. The citations with the red Adobe PDF symbol will download PDFs, the ones with just a white piece of paper will be citation only.
6. Open Mendeley to see the articles that have been added to your library.
	1. If you don’t see the new references in Mendeley Desktop after a few minutes click the Sync button and they should show up.

***Exercise 3 - Add an article using the “drag and drop” feature of Mendeley:***

1. Save an article pdf on your desktop.
2. Next, in Mendeley, click on the ‘Hinari’ folder in your Mendeley library, and drag the pdf file into the center panel, where you would see the titles of the articles.
3. You will notice that Mendeley has re-named the file with the reference information.
4. The right panel will display the reference information for you to review, and make any changes. Be sure to check these details, as not all pdf files have the proper reference information attached! See PPT slides for options to make corrections.

***Exercise 4 - Manually add a book to Mendeley:***

1. Go to Google Books (<http://books.google.com>)
2. Type **‘Hinari’** and click on the **‘Meeting the Information Challenge: The Experience of Africa’** result.
3. Click on the link **“Copyright”** (bottom left side), to obtain the reference information.
4. Go back to Mendeley. Click on the **“Hinari” folder** to add the reference to this folder.
5. Click **File>Add Entry Manually.** This will give you a blank reference template to fill in.
6. Select Reference Type **‘Book’**.
7. Input data from the table below, then click “Save”.

|  |  |
| --- | --- |
| Field in Mendeley | Information to put in fields |
| Title | Meeting the Information Challenge: The Experience of Africa |
| Authors | Grieco, MargaretColle, RoyalNdulo, Muna |
| Year  | 2006 |
| City | Newcastle |
| Publisher | Cambridge Scholars Press |

***Exercise 5: Add reference for an online book chapter:***

***UPDATE THIS EXERCISE TO BE FROM HINARI BOOKS***

You will want to cite online book chapters. Unfortunately, Mendeley does not offer an importable format that contains all of the fields you will need. But you can quickly back into creating the proper format by following the next few steps:

1. **Go to UpToDate** from the **Norris Library home page**.
2. Search for: ‘**gait disorders’**
3. Click on the title: **“Functional movement disorders”**. The Author information will be located under the title.
4. **Go back to Mendeley.** Click on the **“PT561b” folder** to add the reference to this folder.
5. Click **File>Add Entry Manually.** This will give you a blank reference template to fill in.
6. Select the **‘Web Page’** format. Scroll down to the **Date Accessed field** and enter the date in this format**: 2018-01-17**.
7. Now **change the Type dropdown to ‘Book Section’** and enter the remaining information into the designated fields below, then click **“Save”**.

|  |  |  |
| --- | --- | --- |
| Field in Mendeley | Information to put in fields | Where to get it from (for UpToDate) |
| Title | Functional movement disorders | from UpToDate record |
| Authors | Miyasaki, JM | from UpToDate record |
| Book | Post TW, ed. *UpToDate* | always the same for UpToDate |
| Year  | 2017 | enter current year |
| City | Waltham, MA | always the same for UpToDate |
| URL | <http://www.uptodate.com/> | always the same for UpToDate |

***Exercise 6: Using the Citation Editor in MS Word***

**Before you begin:** Make sure you are logged into **Mendeley Desktop,** as it needs to be running in order to use the “cite while you write” feature in MS Word.

In Mendeley, go to **View🡪 Citation Style** and select **‘American Medical Association’.**

1. Create a new Word Document for this assignment, go to the **References or Add-Ins tab.** You are looking for “Mendeley Cite-o-matic” or a toolbar that looks like this:



(If you are using a Mac and do not see the Mendeley toolbar, Click View> Toolbars> Mendeley toolbar).

1. In the **Style dropdown**, **select “American Medical Association”.**
2. Type a sentence and to insert a citation:
	1. Click **‘Insert Citation’**.
	2. Remember to follow AMA format for where to insert the citation (after the ‘.’ if at the end of a sentence.)
3. Next, you will enter a citation. You can insert citations in two different ways:
	1. Start typing the name of the reference you want to use into the pop-up and select the article you want. (This is the easier and more commonly used method).
	2. Another way is to click **‘Go to Mendeley’**, find the reference there, and then click the **‘Cite’** button at the top of Mendeley Desktop.
4. Type another sentence – this time you will **add multiple citations** at the same time. You have two options here as well:
	1. Click **“Insert Citation”.** You should now have three references in your Hinari folder.
	2. Type **the author name for one of these, and select the citation**. **Immediately begin to type the author name for a second article, after the semi-colon. Select the second citation.** (This is the easier and more commonly used method when entering 2+ citations at once)
	3. Or a second way is to **add one citation** and then **highlight that reference**, click on **“Edit Citation”** to add a second reference. (If you only click after the first reference and add a second, the numbers will not format properly. This method is usually used when you realize later that you want to add a second citation.)
5. Scroll to the bottom of your document and click “Insert Bibliography”.
6. Change the order of your sentences, click the “References” tab, then “Refresh” to see how Mendeley easily updates the order of your references.
7. ***Always check for errors in your reference information! Mendeley/PubMed can make errors too! Fix any citation errors in Mendeley, not in Word as these will not stick!***
	1. Fix citations in the right panel in Mendeley.
	2. After you make your changes, go back to your Word document, Click the “References” tab, then Click “Refresh” to update the citation in your Word doc.

**Optional Exercises**

***Manually add a website to Mendeley:***

Sometimes you may want to cite a webpage.

1. Click File>**Add Entry Manually.** This will give you a blank reference template to fill in.
2. Select Reference Type **‘Web Page’** - Input data from the table below, then click **“Save”**.

|  |  |
| --- | --- |
| Field in Mendeley | Example of what to put in the fields |
| Title (if the page has one)/Publisher (sometimes applies) | Preparing for Low Back Surgery. American Academy of Orthopedic Surgeons |
| Author (only if one is clearly listed; last name, first name) | [leave blank in this case] |
| Date Accessed: | September 3, 2016 |
| URL | http://orthoinfo.aaos.org/topic.cfm?topic=A00597 |

***Manual Corrections to Citations in Word Document***

Sometimes you will have to manually correct your references in your Word document (i.e. when a journal uses a slightly altered version of a citation style that you cannot create in Mendeley).

1. Make sure you have made all of the changes to your paper and that this is your **final version** before proceeding to the following steps.
2. In Word, Click **References/Export.**
3. Click on **‘Without Mendeley Fields’**. Save the document with a **new name** (i.e. or include “flat file” in the title, to avoid confusion between documents). Your document will now be converted into a “flat file”, where you can manually change your citations and references.
4. Go to the folder and open the “flat file” version of your document.
5. Go to one of your references, and make a change.
6. Save the document.

***Rename PDF Files***

1. In your **computer** add all the pdfs you want to rename into a folder.
2. Go to **Mendeley Desktop.** **Click “Create Folder…”** Name the new folder **Renamed Files.**
3. **Click on the Renamed Filed folder in Mendeley** and then **drag the folder from your desktop into the center panel to copy all of the pdfs into Mendeley.**
4. In Mendeley go to **Tools > Options (or if using a Mac: Mendeley > Preferences).**
5. Click the **“File Organizer”** tab.
6. Check the box next to **“Organize my files”**.
7. Click the **Browse button** to **create a new folder in your computer** to save the renamed files to. Note: You can always re-organize in a different structure afterwards if you are not content with the initial selection.
8. Move down to the **Rename document files** section. Check the box next to “Rename document files”.
9. Drag the bubbles for the categories you would like to include in the file name **from the Unused fields box** into the **File name: box** (i.e. Author, Year, Title, Journal).
10. Click OK.
11. Go back to your computer. Open the new **“renamed”** file that you created, and you will see all of your renamed pdfs. Updated: 2018-12

