

**Mendeley Exercises**

You will complete exercises 1-5 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:**

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

**Exercise 2**

**Import a list of articles from a Hinari PubMed search into Mendeley:**

* Login to Hinari Pubmed.
* Run a search for **tuberculosis AND HIV** or a topic of your choice.
* **Check** the **box** next to **4 articles of interest.**
* Click the **“Send to”** dropdown, and add them to the **Clipboard.**
* **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”**.
* Select the **“Hinari”** folder in the search box at the top of the page.
* Then click **‘All’** to import all the articles to your Mendeley library.
  + 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 not all of them.
* **Open the Hinari folder in Mendeley Desktop** to see the articles that have been added to your library.
  + If you don’t see the new references click the **Sync button.**
* The **Web Importer** is a useful tool, but does not always work perfectly. If the Web Importer does not import your citation, you can add citations by importing a pdf or manually adding the citation. The following exercises will walk you through these steps.

**Exercise 3**

**Add and annotate a pdf (using the “drag and drop” feature of Mendeley):**

* **Enter the URL below** into your **browser address box** to get the full-text pdf of “Multidrug-resistant tuberculosis today” by A Matteelli et al.:
  + **http://www.who.int/bulletin/volumes/90/2/11-097360.pdf**
* Download the pdf and save it to your desktop.
* Next, in Mendeley Desktop, 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.
* You will notice that Mendeley has re-named the file with the reference information.
* 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.
* Click on the pdf to open it.
* Click on the **“Highlight” icon** to change your cursor. Run your cursor over a part of the text to highlight it.
* Now, click on the **“Note” icon**. Click the pdf next to a paragraph that you would like to add a note.
* Click on the “My Library” tab at the top of the pdf to return to your Mendeley library.

**Exercise 4**

**Manually add a book to Mendeley:**

* Go to Google Books: <http://books.google.com>
* Type **‘Hinari’** into the search box.
* Scroll through the results and click on the link for **‘Meeting the Information Challenge: The Experience of Africa’**.
* Click on the link **“Copyright”** (bottom left side), to obtain the reference information.
* Go back to Mendeley. Click on the **“Hinari” folder** to add the reference to this folder.
* At the top of the screen, click **File>Add Entry Manually.** This will give you a blank reference template to fill in.
* Click on the arrow to open the dropdown menu options for “Type”. Select **‘Book’**.
* Input the data from the table below, then click “Save”. Note: some fields will remain blank.

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

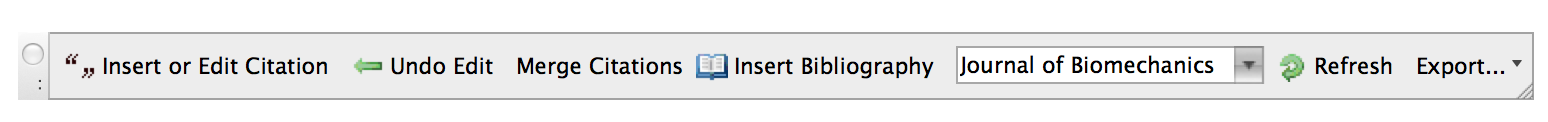
**Exercise 5**

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

**Note:** If you do not have the ‘cite while you write’ feature, go to the ‘Reference Management Software Zotero Download Instructions’ ppt and follow the instructions to install this option.

* Now go back to MS Word and create a new Word Document for this exercise.
* The Mendeley toolbar may be located in different locations depending which version of Word you are using. Go to the **References tab.** You are looking for “Mendeley Cite-o-matic” or a toolbar that looks like this:



**Note:** If you do not see the Mendeley Cite-o-matic menu or toolbar under References, try looking under the **Add-Ins tab.** If you are using a Mac and do not see the Mendeley toolbar, Click **View> Toolbars> Mendeley toolbar**).

* In the Mendeley toolbar, find **Style. Open the style dropdown menu** and **select “American Medical Association”.**
* Type a sentence in your Word document. Or search for a PDF article of your choice in **Hinari PubMed** and import it into Mendeley.
* Copy a part of that article and paste it in your Word document. Translate the message into your own words using simple English. Next you will cite this citation.
* To insert a citation:
  + Place the cursor at the end of the sentence, then go to the Mendeley toolbar and click **‘Insert Citation’.**
* You can insert citations in two different ways:
  + 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).
  + Another way is to click **‘Go to Mendeley’**, find the reference there, and then click the **‘Cite’** button at the top of Mendeley Desktop. **Note:** when searching for references using the **“Go to Mendeley”** feature, your computer will be locked in Mendeley until you click on the **Cite** button. You will then be able to return to your Word document.
* Type another sentence – this time you will **add multiple citations** at the same time.
  + Click **“Insert Citation”.** You should now have at least three references in your Hinari folder.
  + 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.**
* Now that you have a few citations you will want to add your bibliography. Place the cursor at the bottom of your document and in the Mendeley toolbar click **“Insert Bibliography”.**
* To see how Mendeley can quickly re-order your bibliography we will change the order of your sentences/citations. Cut and paste the second sentence above the first (including the citation at the end of the sentence).
* In the Mendeley toolbar click **“Refresh”** to see how Mendeley easily updates the bibliography.
* ***Important note: If you find an error in your reference information, you will have to go back to Mendeley to fix the error. Any changes you make in Word will not be saved.*** 
  + Fix citations in the right panel in Mendeley.
  + 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.

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

|  |  |
| --- | --- |
| Field in Mendeley | Example of what to put in the fields |
| Title / 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: | April 11, 2018 |
| 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. For example if a journal uses a citation style that does not exist in Mendeley.

* 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.
* In Word, Click **References/Export as.**
* 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.
* Go to the folder and open the “flat file” version of your document.
* Go to one of your references, and make a change.
* Save the document.

**Rename PDF Files:**

You can use Mendeley to quickly rename unrecognizable PDF file names on your computer.

* In your **computer** add all the pdfs you want to rename into a folder.
* Go to **Mendeley Desktop.** **Click “Create Folder…”** Name the new folder **Renamed Files.**
* **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.**
* In Mendeley go to **Tools > Options (or if using a Mac: Mendeley > Preferences).**
* Click the **“File Organizer”** tab.
* Check the box next to **“Organize my files”**.
* Click the **Browse button**. Click on **“New folder”** to **create a new folder in your computer** to save the renamed files to.
* Next, back in Mendeley, check the box next to **“Rename document files”.**
* 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). Click OK.
* Go back to your computer. Open the new **“renamed”** file that you created, and you will see all of your renamed PDFs.

Updated 2019 05