Using Mendeley Reference Manager with Mendeley Cite

Mendeley Reference Manager allows you to store and organise your research sources so you can create in-text citations and reference lists in Word. It can save a lot of time when completing larger research projects.

Note that Mendeley is not a magic solution to referencing issues! It is only as good as the data it receives. You must still check your references to ensure accuracy.

This guide covers setting up an account and downloading the software (Step 1), understanding how Mendeley works (Step 2), getting references in (Step 3), using Mendeley Cite in Word (Step 4) and getting more help (Step 5).

Step 1 – Setting up an account and downloading the software

1. Go to Mendeley and **Create a free account** – use **'Sign in via your organization'** then type Portsmouth and choose *University of Portsmouth*. Enter your University username and password when prompted. To setup your Mendeley/Elsevier account, you will be asked to fill in a short registration form and may need to confirm your email address.

2. Download Mendeley Reference Manager, run the software and login:

   *If you are using a University device, you will need to download **Mendeley Reference Manager** from Apps Anywhere (students) or the **Company Portal** (staff). Search for Mendeley and install/launch. Once Mendeley is open, right click on the red M icon in your taskbar and pin it for easy future access.*

3. Create a new folder under *COLLECTIONS* (on the left-hand side) to organise your references: click on *Create collection*, type in the folder name you want and hit Enter to save.

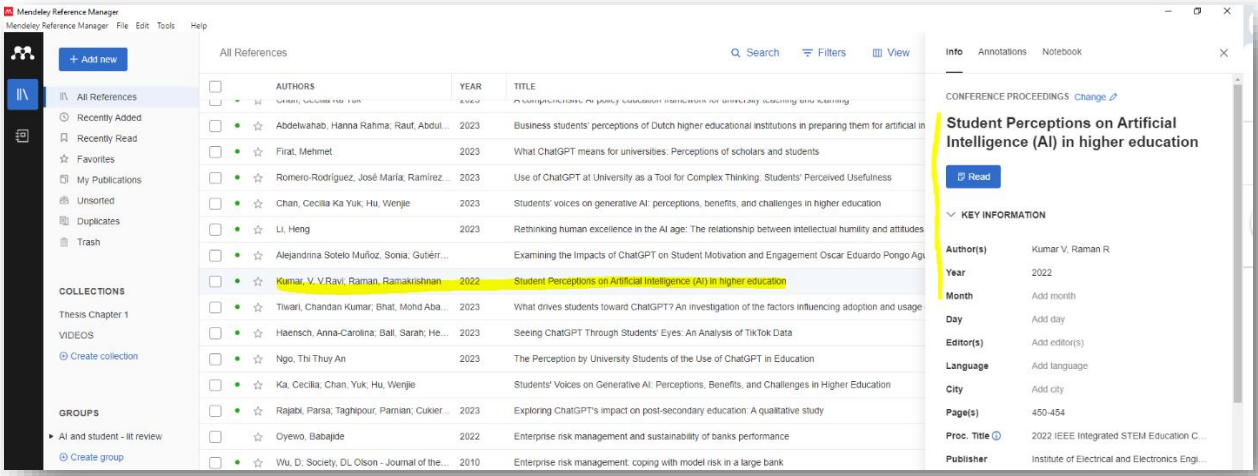
4. Once you have created your account, your online library can also be accessed at any time, without Reference Manager being downloaded.

Step 2 – Understand how Mendeley Reference Manager works

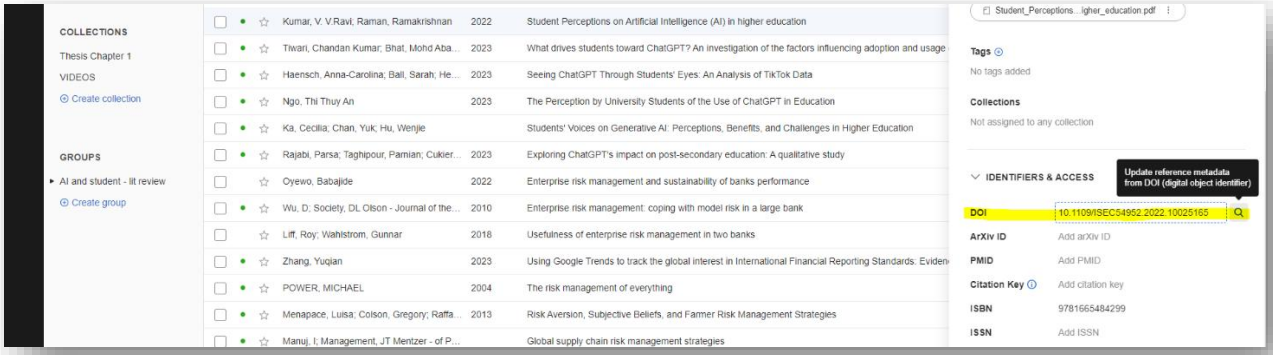
Before we look at the various ways to add items, here are some key points about how Mendeley works:

- Whenever you bring in any new references, you should **use Sync** (bottom left) to **refresh** your library:

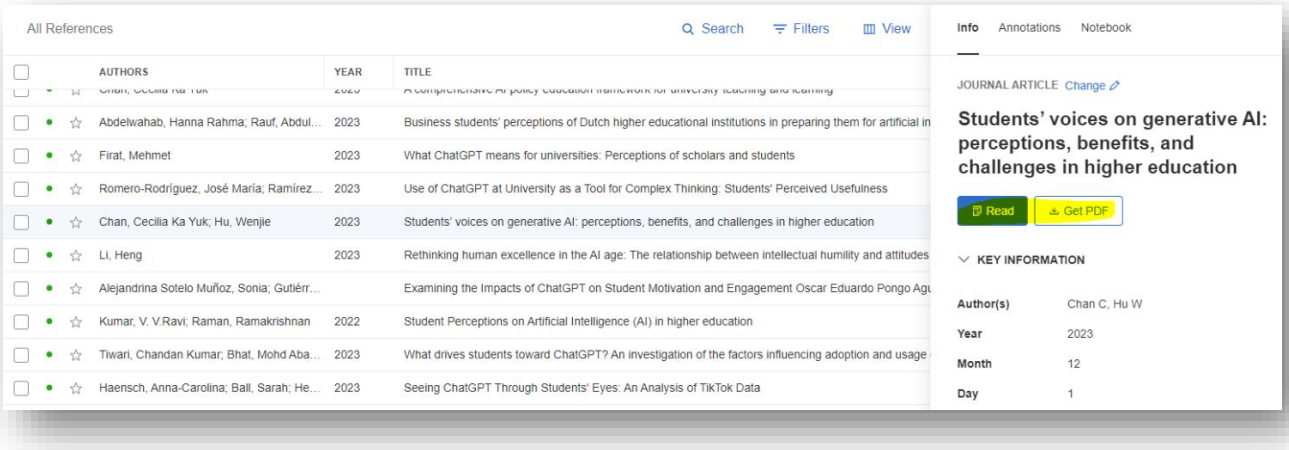
- As you add references, you must click on them to see the **Info** screen. For every entry, you must **check the data is correct**. If anything is wrong, you can manually edit any of the fields (e.g. title/author) by clicking on them:



- If the information does not look right, or is missing some details, scroll down, and you can also look up journal articles with DOIs and pull in correct details from the Mendeley catalogue:



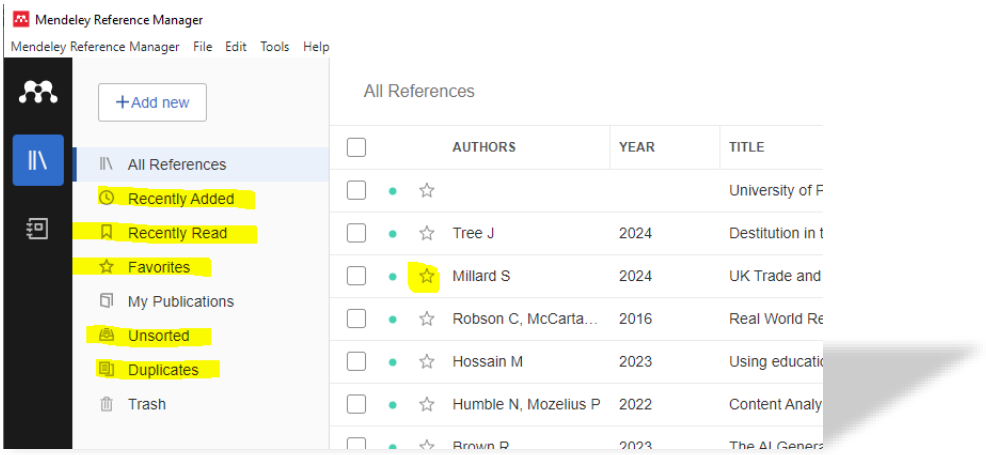
- Once your reference details are correct, if you have not added the PDF of a journal article, and one is available, you can click on *Get PDF* to add it:



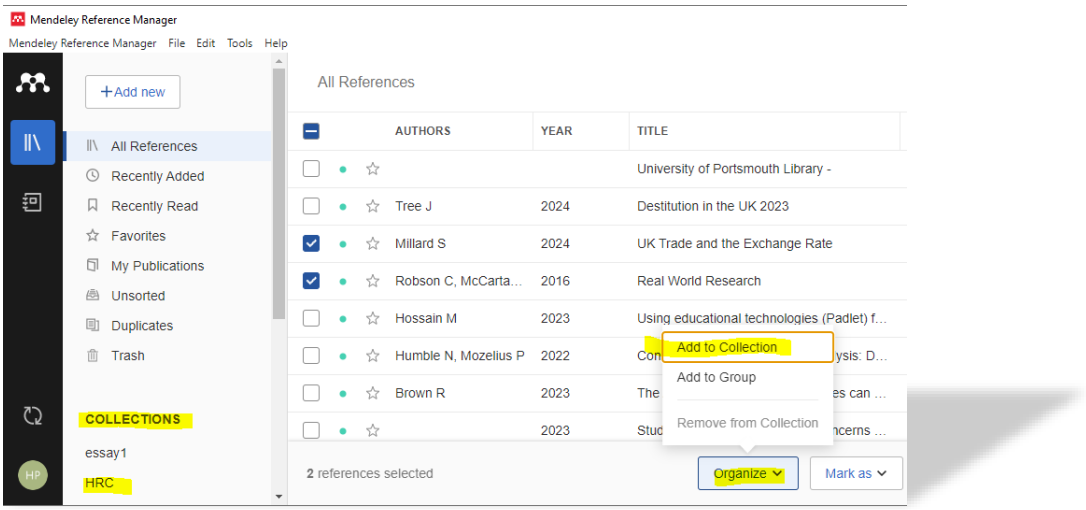
- Via the 'Read' option and *Annotations/Notebook* tabs at the top, you can annotate and add notes to your pdfs and collate your comments across sources. Single Notebook pages can be exported as .rtf files for Word. There is also a *GenAI Reading Assistant* if you want to summarise a PDF or ask questions.

As you only get 2GB free storage, you may not want to add PDFs to every reference.

- You can also organise how you view your references by using options such as *Recently Added* or *Recently Read* (left hand side). Use the star button to add any *Favorites*.



- To move your references around, drag and drop them into any Collection folders you have created, or select a few using the tick boxes and use the *Organize* option. *Unsorted* (on the left-hand side), shows you any references that are not in a collection. There is also a *Duplicates* option (see Step 3F on this).



Step 3 - Getting references into Mendeley

A. Drag and Drop downloaded PDF journal articles:

When you download a PDF from a database or another source, you can drag and drop this straight into your Mendeley account. You can also do this with any existing PDF files you have saved on your computer:

1. Select the files you want in *Windows Explorer* or your *Downloads* folder on your computer/laptop
2. Drag them over to your Mendeley window by holding down the left mouse button
3. Let them go in the Mendeley main Library window when you see *Copy* or *Add*
4. Mendeley will extract the details from the PDF and you can view the record in *Recently Added*
5. Remember to check the reference as above, using the Info pane.

If you have files saved on your computer, and you don't want to drag/drop, you can select them from *+Add references* and *Import file(s)*. Under this menu you can also *Set up watched folder*: this is a folder on your device where you save PDFs, and they are then automatically imported into Mendeley.

B. Install and use the web importer

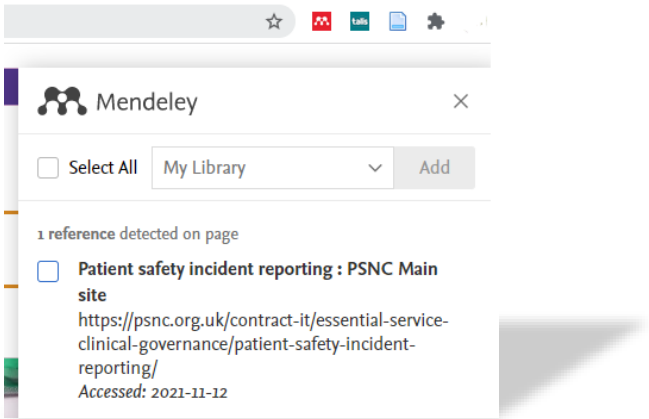
The **Web Importer** tool allows you to scrape reference details from book records, articles, webpages and other documents and add these directly into Mendeley. **It can be very useful but it doesn't work with all website/library databases and you must check the accuracy of the details that are imported!**

i) Install the web importer from Mendeley:

1. Select the *Tools* menu and *Install Mendeley Web Importer*. Choose the appropriate browser option and follow the instructions (Edge is the University's default browser) - select *Get Web Importer for Edge* and then *Get* and *Add Extension*.
2. A small red Mendeley **M** will appear on your browser (see image below).
3. The first time you use the Web Importer, you will need to *Login via organisation* and use your UoP details.

ii) Using the Web Importer tool

1. Search for a record in the *Library Catalogue* or *Discovery*, or another resource of your choice (e.g. *Google Scholar* or a reliable website). For the *Library Catalogue*, make sure you are viewing the full book details.
2. Click on the **M** – a box will open up on the right of the screen which shows the bibliographic details associated with the books/articles or other sources you are trying to import (see image below).
3. **CHECK AND EDIT** the details to ensure they are as you would want them (use the pencil icon to make changes). **The importer tool will not always pick up the correct information!** If there is no published date, leave this field blank as Mendeley will automatically add n.d. (no date) for you.
4. Save the record to your Library generally, or select a particular Collection, using *Add.*
5. **If a PDF is available for the record**, the Web Importer will automatically try and include it in your Library.



C. Export records directly from SCOPUS or elsewhere

Some databases, such as Scopus, have a *direct export* to Mendeley. This is one of the easiest ways to get accurate references but it will not include the PDF of the full article. You will need to download and add this in separately. If there is no direct export option available, there might be a RIS option (see below). *If Scopus hangs or produces an error message when exporting to your Mendeley account, please clear your cache/cookies and try again.*

D. Add records manually

Some sources, such as information, data or reports from professional databases, cannot be added to Mendeley via any of the previous methods. For these, go to *+Add references* and choose *Add reference manually*. Select the type of resource (e.g. report) and fill in the appropriate details and save the record.

E. Add records via RIS: a two-step process

Sometimes you may need to **import a RIS file** from a database like Discovery. Only use this option if you want to download a large amount of results from a database or you can't drag/drop the PDFs. You can also use this method if you need to move references between different reference management tools.

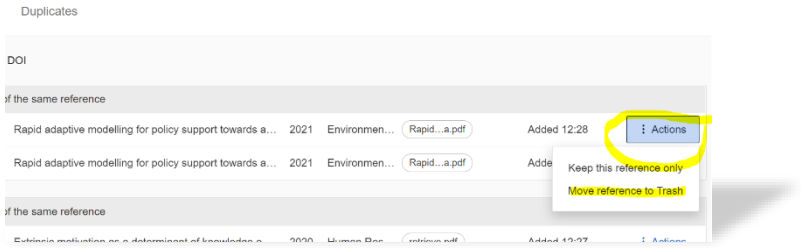
i. **In the database**: select the records you want and look for an *Export* option. Choose *RIS format* and save the file.

ii. **In Mendeley**: choose the *Import library* option under *+Add references* and select RIS. Locate your saved RIS file and add the records to your Library.

F. De-duplication

If you import your references in a range of different ways, you may end up with some duplicate records. Mendeley finds any records that have a duplicate DOI. To view and delete duplicates:

- Use the *Duplicates* option in the left-hand menu
- Look through the records and delete any you no longer require, using the *Actions* menu.



Step 4 – Using Mendeley Cite in Word to create in-text citations and reference lists

Mendeley Cite works in **Word 2016** upwards. It allows you to produce in-text citations as you write and generates a reference list for all your citations at the end. It does this by pulling in and including your Mendeley records in your work as you type. These entries are shown in separate boxes in Word and it is very important that you don't edit or change these entries manually, **all changes must be made within Mendeley or Mendeley Cite** to ensure everything works correctly.

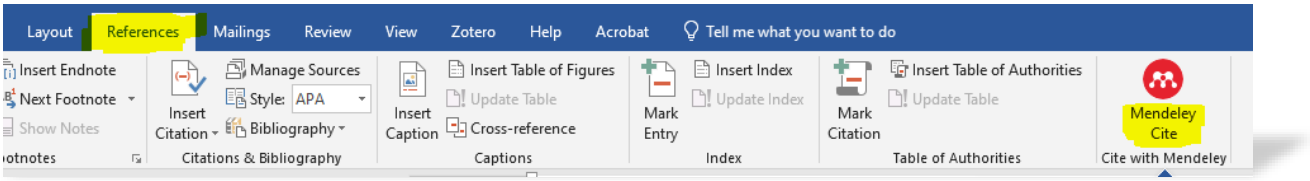
A. To install Mendeley Cite:

1. Ensure you have saved and closed all current Word documents.
2. From the Mendeley *Tools* menu, select *Install Mendeley Cite* and choose *Get it now*.
3. If you are not already signed into your Microsoft Office account, you will be asked to do so.
4. Once signed in, choose *Get it now*, agree to the terms and conditions and *Continue*.
5. Choose *Open in Word*. A new document will appear in Word entitled Mendeley Cite.
6. On the right-hand side, you will see a *New Office Add-in* panel. Choose *Accept and Continue*.
7. The *References* bar will open at the top of your document and you will see a red *Mendeley Cite* icon (see image 1 below). Click on the icon and it will open a *Mendeley Cite* panel on the right-

hand side. Choose *Get Started* to sign in - enter your Mendeley account details (remember to *Sign in via organization* and enter *University of Portsmouth*)

8. Click on *Citation Settings* - APA 7th is the default, or you can choose an alternative under *Change citation style*. Click the blue *Update citation style* button at the bottom of the panel to select your chosen style. It will now appear ticked (see image 2 below).

1.



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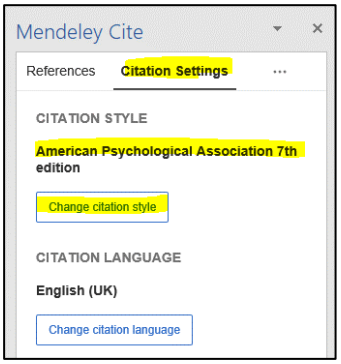

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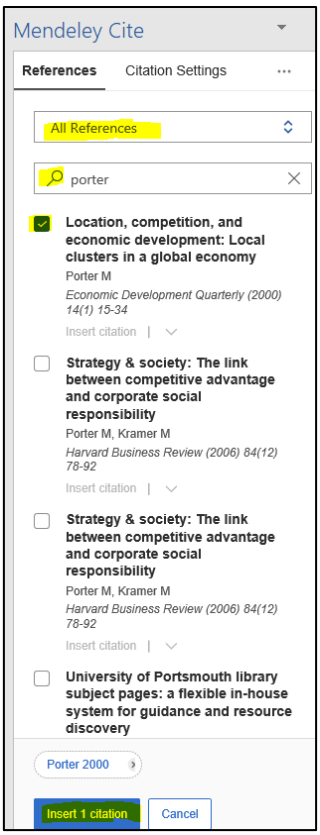
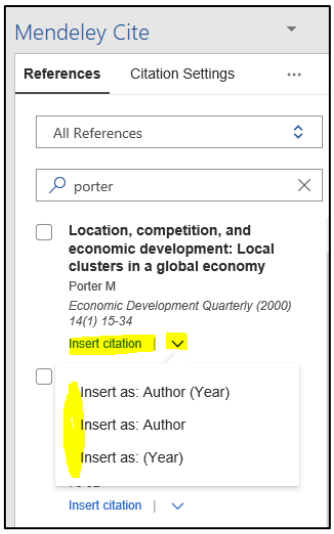


3b.



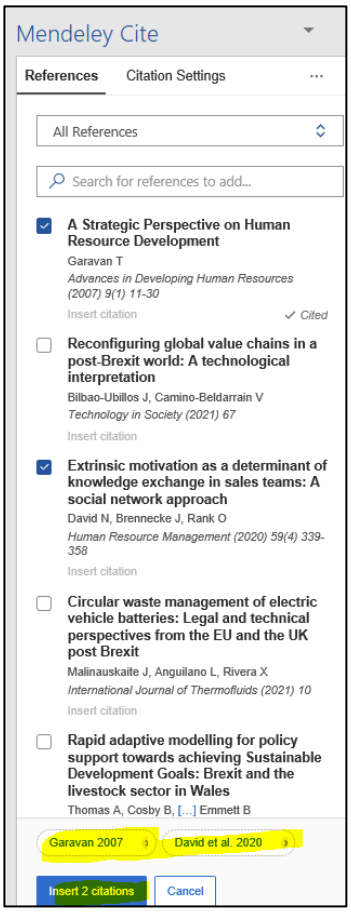
B. In Word - inserting in-text citations

1. Check that your *Citation Style* is set correctly and that you are searching within the correct collection (e.g. *All References*, *Recently Added* or an alternative) selected from the drop-down menu (see image 3a above).
2. Search for the author or title of the reference you want to use. You can now:
    a. use the blue *Insert citation* option to quickly insert a standard in-text citation (see image 3b)
    b. use the down arrow next to *Insert citation* to quickly insert the in-text citation in a different format (see image 3b)
    c. select one or more references using the tick boxes (see image 3a and 4). Next, click in your sentence where you want your citation to be added and select *Insert 1 citation*.
3. The in-text reference will now appear in your sentence in your chosen reference style.
4. Double click into your Word document to come out of the reference, and continue with your work.
5. Repeat steps 2-5 above to add more references.

C. In Word – editing in-text citations

1. When you add an in-text citation, if you want to make changes, click on the author and date at the bottom of the Cite panel (see image 4 below). This will take you into the *Edit Citation* screen (see image 5 below). You can also click on any in-text citation in your sentences to get the option to edit the reference from the bottom of the Cite panel.
2. In *Edit Citation*, you can alter how the citation is displayed (e.g. author and date or just date depending on your sentence - see image 5) and add a page number or a prefix/suffix to your citation (see image 6).
3. Make your edits and *Save changes* and *Insert 1 citation*. If you have already inserted the citation and re-edited it, click off the citation in your Word document to carry on writing.

4.



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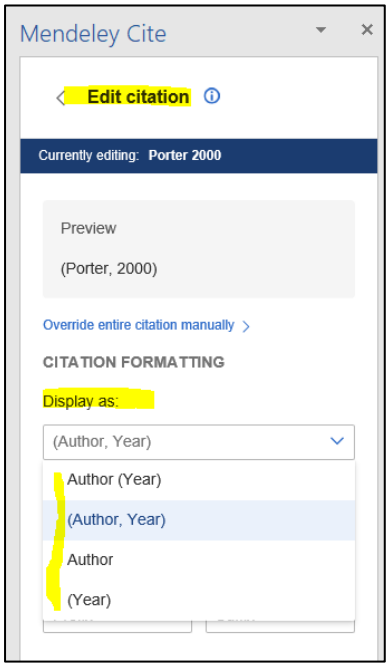

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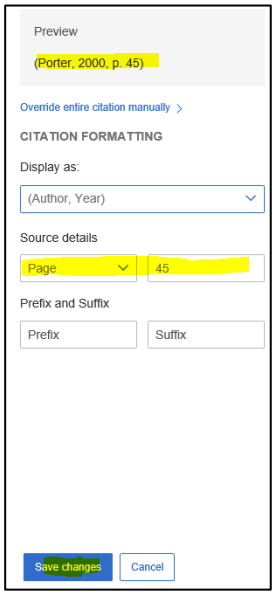
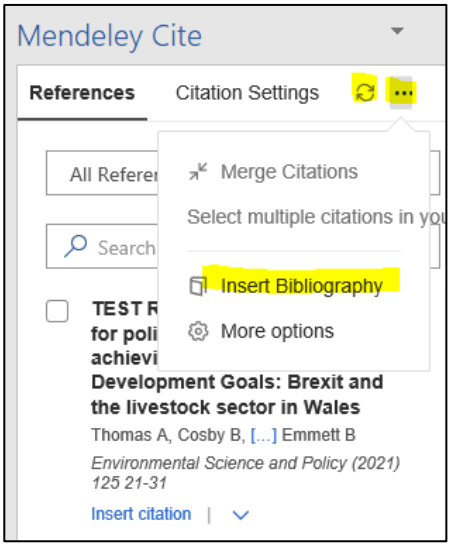
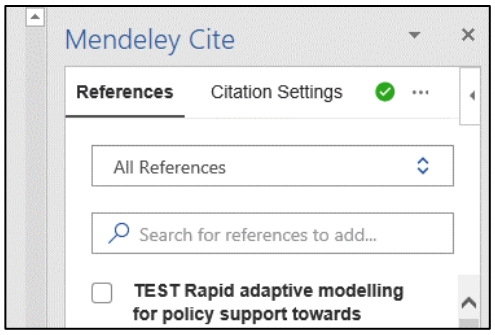


D. In Word – adding your reference list

1. When you are ready, enter a couple of line breaks at the end of your work in preparation to insert your full reference list (use the Enter or Return keys). If you are using APA 7th, type the heading **References** and leave another space.
2. Click … in Mendeley Cite, choose *Insert Bibliography*. If you have a very large document you may wish to *Switch to manual updates* to improvement performance. If not, choose *Keep live updates* and *Continue* (see image 7). Any references you have included in your sentences will now appear at the end of your work.
3. Check your references carefully against APA 7th guidance (or your chosen style). **If there are errors, change these in Mendeley** and then watch **the Sync button** work (bottom left). Return to Word and check the changes have carried across to Mendeley Cite and your Word document. The sync

button in top bar will change to a green tick (see image 8 below). If this shows as a sync circle still, click on it to force the updates (see image 7 below).

7. 

8. 

Example of how your APA 7th in-text references and reference list may look:

This is a pretend document referring to various sources (Porter, 2000). It includes in-text citations with authors outside of the brackets, such as Darley and Luethge (2019) as well as those in the brackets, with page numbers for "direct quotations" (Westwood, 2006, p. 94).

References

Darley, W. K., & Luethge, D. J. (2019). Management and business education in Africa: A post-colonial perspective of international accreditation. *Academy of Management Learning and Education*, *18*(1), 99–111. https://doi.org/10.5465/amle.2016.0086

Porter, M. E. (2000). Location, competition, and economic development: Local clusters in a global economy. *Economic Development Quarterly*, *14*(1), 15–34. https://doi.org/10.1177/089124240001400105

Westwood, R. (2006). International business and management studies as an orientalist discourse: A postcolonial critique. *Critical Perspectives on International Business*, *2*(2), 91–113. https://doi.org/10.1108/17422040610661280

Step 5 - Getting more help on Mendeley and Referencing

For any technical problems installing Mendeley Cite, please contact Information Services.

Additional guidance from Mendeley includes:

- Mendeley's guidance for Reference Manager
- Mendeley's guidance for Mendeley Cite

Referencing guidance includes:

- University of Portsmouth reference guidance
- Library's 24/7 online chat service (for general referencing queries, not Mendeley)