# Reference management: introduction to Mendeley. Integration with LaTeX.

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There are many management bibliography software (free or for a fee), for example:

- Mendeley (free up to 2 GB)

- zotero (free up to 300 MB)

- EndNote™

Comparison chart (ITA):
https://bibliotecadigitale.cab.unipd.it/bd/gestione-bibliografie-documenti-e-immagini/scegliere-un-programma-di-gestione-della-bibliografia

Mendeley is an application of reference management that helps to:

➢ create and organize a own bibliographic database, eventually with pdf of the articles

➢ import citations from catalogues, databases, journals, websites…

➢ insert citations in the text with specific citation styles

➢ automatically create final bibliography

# https://www.mendeley.com/

# First of all...

1) Create an **account** on Mendeley
2) Install **Mendeley desktop**
3) Install **Web Importer**: it is a browser extension that helps import citation during web navigation
4) Install **Citation Plug-In** (only if you use Word, LibreOffice or other word processing system, it isn't helpful with LaTeX): it allows to insert formatted citations in text file and to create bibliography

# Bibliographic database

- It is created importing citations from web or by local files
- The records appear in "Library".
- It is possible to organize the database in folders, but the records remain ever in "All documents" too.
- To align the archive (records and folders) between Mendeley Web and Mendeley Desktop click to **Sync**.

# The six different ways to import citations in Mendeley

## 1. Direct importation

Click on Mendeley button (or "Save citation" or "Export") in the resource.
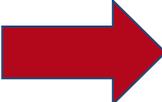
➡ Elsevier resources, e.g. Scopus
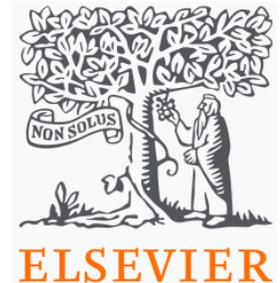
# The six different ways to import citations in Mendeley
## 2. Indirect importation

1) Export citation in a file (.ris) and save.
2) Import this file in Mendeley: citations appear in the Library
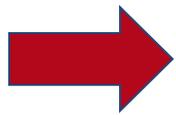
→ Not Elsevier resources, e.g. Web of Science, GalileoDiscovery, SocIndex

# The six different ways to import citations in Mendeley

## 3. Web importer

Click on Mendeley icon (in address bar) when the resource is visualized.
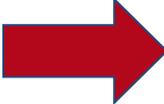
➡ websites and other resources, e.g. GoogleScholar, MathSciNet

# The six different ways to import citations in Mendeley

## 4. Drag and drop PDF file

Drag and drop the PDF file of the article in Mendeley and the citation fields are filled in.

It only works with native PDF files, not scans.

# The six different ways to import citations in Mendeley

## 5. Add entry manually

You can manually insert the citation, choosing the correct type and filling in every field.

If you know the identifier (DOI, ArXivID or PMID) of one item, you can add the citation in this way.

# The six different ways to import citations in Mendeley

## 6. Import folder and Watch folder

You can import a local folder with some pdf articles, like with the drag and drop file method.

With Watch folder the system import automatically every new file in the selected folder.

# Verify and correct imported records

You can correct the record during importation by clicking on the "Edit" button in the "Web library" window.

What to check:
- ✓ the "Type" of record chosen (book, article, website)
- ✓ correctness in filling in the individual fields

# Other useful features of Mendeley

**Folders**: use the 'Add folder' button to create a new folder and move here the references you want, to organize your library.

**Private groups**: with a free account you can create and own 5 private groups, that can have a maximum of 25 members. Members can share citations and PDF files and work together on it.

# Only on Mendeley Desktop

**Check for Duplicates**: to control and merge duplicate entry

**Need reviews**: lists any items which Mendeley has imported, but may require extra attention. Once you review the details and indicate that they're correct, it will be removed from this list.

**Filter panel**: several different options to allow you to quickly filter your current view.

**Options**

# Citation Plug-In

After the download of the plug-in, in Microsoft Word for Windows, the tool can be accessed via the References tab on the ribbon. To use, log into Mendeley Desktop.
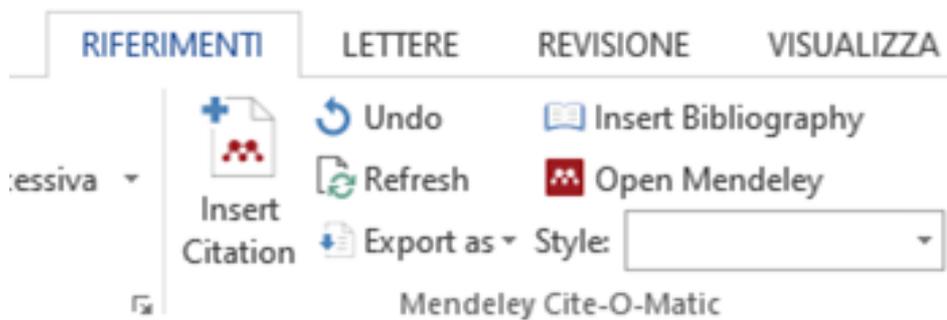
# Insert citations

- Position the cursor where you want to insert your citation and press the Insert Citation button on the toolbar.
- A pop up appears where you can search for the bibliographic reference to be entered.

OR

- Position the cursor where you want to insert your citation and press the Insert Citation button on the toolbar, then click on 'Go To Mendeley' to open Mendeley Desktop and browse to the specific reference using that interface.
- Select the correct reference and click on the "Cite" button.

# Choosing citation style

1) You can choose the citation style selecting it from the drop-down menu that appears in the "References" tab (Style).
2) If necessary, click on "More Styles" at the bottom of the drop-down menu to open the "Citation Styles" window in Mendeley Desktop.
3) All the citational styles that can be used are listed in the "Installed" tab. In the "Get More Styles" tab you can search for other citation styles to install.

# Creating a bibliography

1) Position the cursor where you want the bibliography to appear and press the 'Insert Bibliography' button on the plugin toolbar.

2) The list of the texts previously cited will appear in the chosen citation style.

3) If you insert a new citation after this operation, the bibliography will be up to date automatically.

# Integration with LaTeX

You can export the citations from Mendeley to a BibTeX file, to use in LaTeX.

Also you can set up a folder (or many) on your pc where citations in bibtex format are updated (only from Mendeley desktop, from options).

Please note: the .bibtex file has to be in the same folder of the text file of the LaTeX article or thesis to work properly.

# Citation key

Pay attention to the <u>citation key</u> that has to be present in the references to work with LaTeX.

Citation keys are automatically generated in the format [AuthorYear].

# Mendeley guides
## https://www.mendeley.com/guides

# Guide "Compose the bibliography in LaTeX" (ITA)
## http://www.guitex.org/home/images/doc/GuideGuIT/bibliografia.pdf

# Thank you for your attention!