

# The Humanities Resource Center



## Quickstart Guide to local file management with Mendeley

Mendeley is a free cross-platform tool that helps you organize, manage, and share your research papers (in PDF format) on your computer and via a web interface. This tool allows for you to index your PDFs from your computer in an easy to search system.

### Downloading Mendeley Desktop on Your Computer

To download Mendeley Desktop for your computer, go to <http://www.mendeley.com>. Click on the Sign up and Download button. You will then fill in your name, email address, and password. Once you sign up, you can choose the operating system you are running on your computer and install the application.

Sign up & download

It's free and available for:

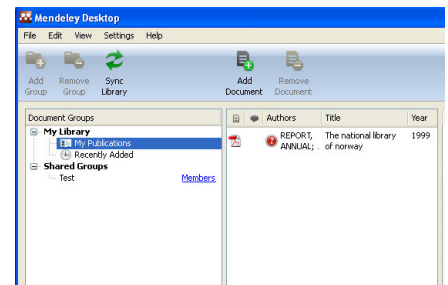


### Opening Up Mendeley Desktop and Adding Documents

To open Mendeley Desktop, you will want to go to the folder you installed the software. Double click on the icon to start the application.

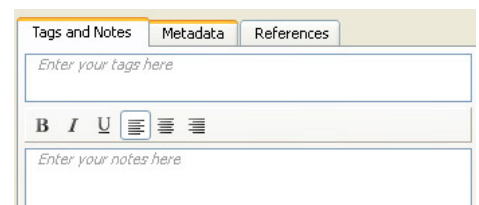


To add a document to Mendeley, click on the Add Document button, or you can drag and drop your PDF files into the application window. To delete a document from Mendeley, click on Delete Document button.



### Adding Tags and Metadata to Documents

To organize your documents, Mendeley allows you add tags, notes, metadata, and view references of each PDF. To add tags, click on the article. On the right hand side, Click on the Tags and Notes tab. Fill in any keywords (tags) to help you organize this document. Tags can also help you with searching for a document. You can add notes too about the document. To review and add/edit metadata, click on the Metadata tab. If you make changes to the metadata, click the save button. To view information about references for the article, click on the References tab. Here you will see information on the references of that article (to help you find and read it for research).

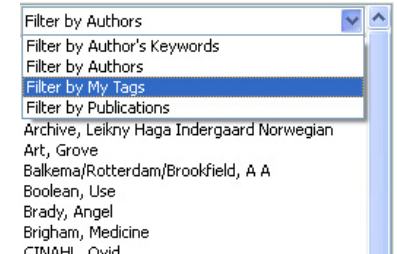


## Searching For Documents in Mendeley

You can search for documents in Mendeley. To search for document in Mendeley, click in the search space at the top right of the application and type in a keyword. Mendeley will search for the keyword in the title, author field, etc. The search bar only works on the folder you are currently in. For example, if I type a word and I am currently in My Publications, it will only search My Publications, even though there may be a match under the Recently Added folder.



In conjunction with using the search bar, you can also use filters to find documents you are looking for in Mendeley. On the left side on the document, you can filter out the documents based off of the tags you added, by the author (s), authors keywords, or by the publications.



Another quick way to sort through your PDF documents is to click on the titles at the top of the Mendeley applications (just like an email) to sort via author name, title name, date, etc.



## Exporting Files from Mendeley

You can export a PDF file from Mendeley as a BibTeX (.bib) file, an RIS file (.ris), or an Endnote XML file (.xml).

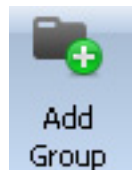
## Saving Your Documents to Your Account on Mendeley.com

Mendeley gives you the option of syncing up your document library with your online account. Now, if you need to access a document and you're not at your computer, you can get it through the web. To sync up your Mendeley Desktop with Mendeley.com, simply click the Sync Library button. Then, log into <http://www.mendeley.com> to view your library.



## Sharing Your Documents in Mendeley Desktop with Others

Mendeley allows you to create groups of Mendeley members you can share certain documents with through the Mendeley Desk application. Click on the Add Group button. Give the group a name. Then click on the link titles Members (located at the right of the group name)/ Now when you sync your library with Mendeley.com, this will also send any documents you added to this group to other group members.



## Finding Other Documents and Researchers at Mendeley.com

Mendeley.com is like a social network for researchers. When you go on the site, you can search for other researchers by their interests, disciplines, location, and their publications. You can find other people to consult with through the Mendeley network and find more resources and materials for your class and research. The website is also another way to build a network and create groups in your Mendeley desktop application to share and exchange information over long distances and keep research documents organized.