Getting started with Mendeley Desktop

Welcome to Mendeley! The productivity tool that makes your research workflow more efficient.

This guide will provide you with everything you need to know to get up and running in no time.

[Watch this short video](#) to see how Mendeley is helping millions of people organize their research.
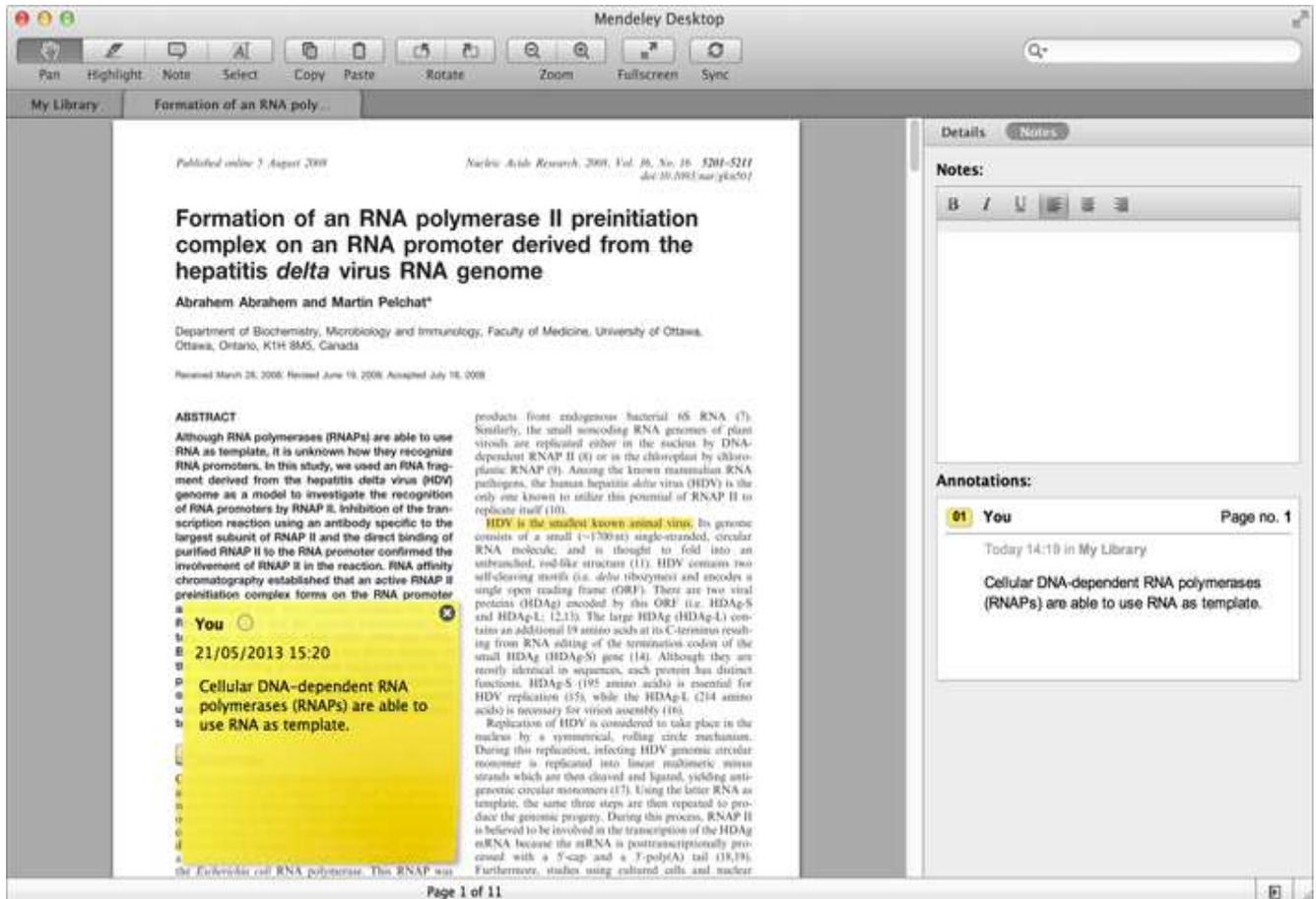

[My Library](#)

PDF Viewer

Before we get started, here are some terms you should be familiar with:

Mendeley Desktop : Mendeley Desktop is the downloaded part of the software installed onto your computer. Download Mendeley Desktop if you haven't already.

Mendeley Web : This is the Mendeley website where you can access the web version of your library, edit your profile and search for papers, groups or people.

Sync : The process of synchronizing your Mendeley data across devices.

Web Importer : The browser bookmarklet that lets you quickly import documents from anywhere on the web.

Citation Plugin : A plugin you can install that allows you to create and format your citations and bibliography according to your chosen style.

Great! You're ready to get started…

Adding your existing documents

Adding your existing documents is the best way to see how Mendeley can start saving you time.

Drag and drop files or folders

Drag & drop files or folders into the open Mendeley window. This is great for quickly adding files to Mendeley. Recently added files can be found in the "Recently Added" folder in the left hand pane.
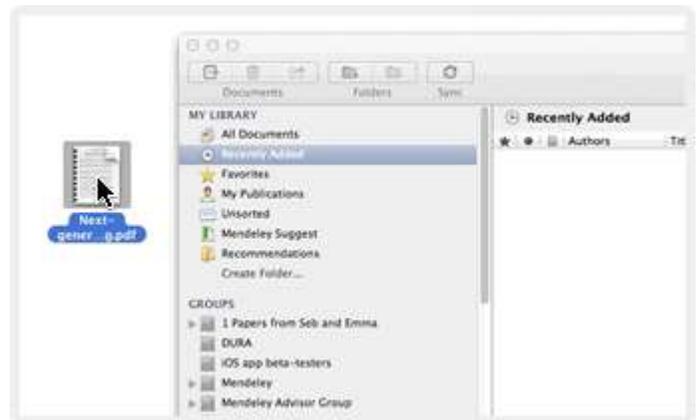
Import from other software

1. Export from other software into RIS, BibTeX, PDF or EndNote XML file format.
2. Click File → Import and select the exported file.

You can transfer your library from EndNote™, Papers, Zotero, Refworks, Jabref and more.

Add your publications

Drag papers you've authored into the My Publications folder on the left for them to be promoted via your Mendeley profile page.

Once added, other users can download the PDFs directly from your profile and your work can be seen by researchers worldwide.

Finding and organizing your files

Find papers you're looking for and easily catalog documents based on your workflow.

Search the full-text of your library

Search for a keyword in the top right to find documents instantly as you type. The search includes global notes and tags by default and you can filter specifically by clicking the filter arrow.
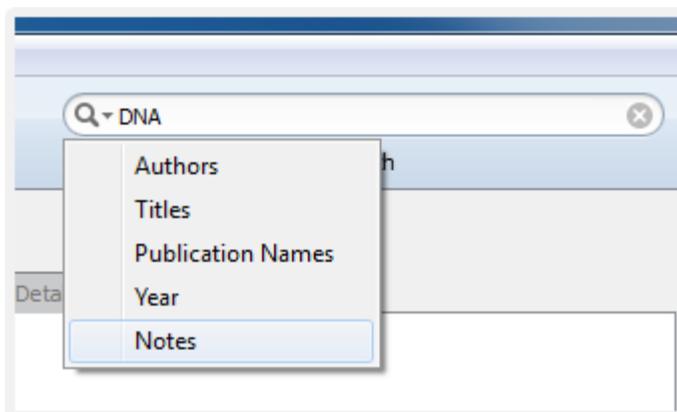
Create folders & sub-folders

Right click anywhere in the left hand pane to create folders and sub-folders. You can drag and drop files into folders from anywhere.
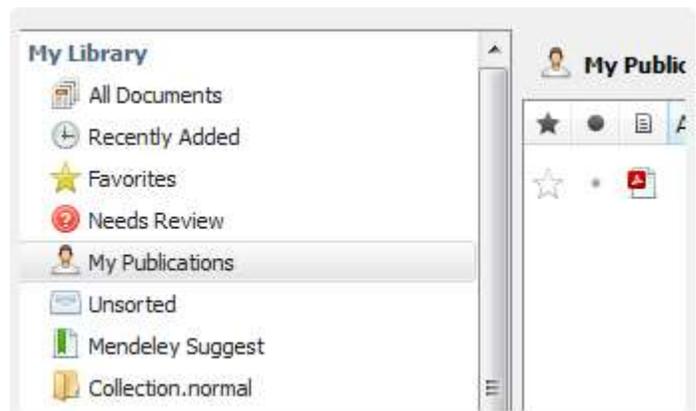
Tip: We recommend starting with search to help find things fast. The real usefulness of folders is for reducing the scope of your search.
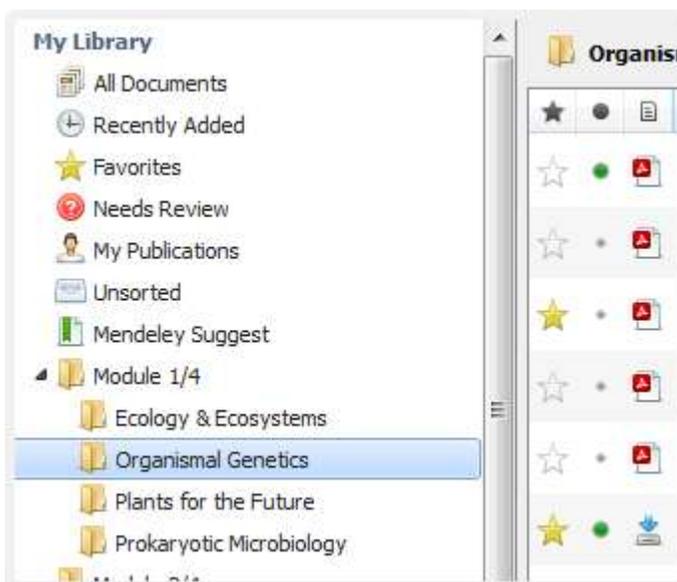
Organize with tags

You can select a document and add tags in the right hand details pane and then search for tag names to find a group of documents easily.

Tags work much the same as folders, with the key differences being that it's easier to add lots of tags to a document than it is to drag it into several folder.
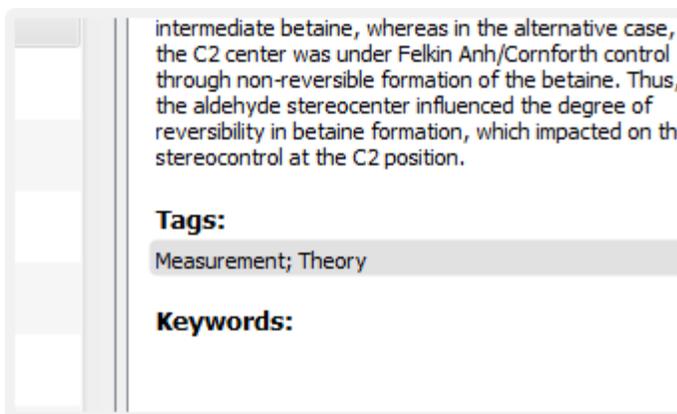
Read, search and annotate

The built-in PDF viewer allows multiple open documents, highlighting, post-it-like note taking and more.

Open a document in the PDF viewer

Click the PDF icon or double click to open a document in the viewer. We've listed icons that you will come across below (no icon means no full-text is available).

- Favorite document
- Mark as read / unread
- PDF available

PDF available for download

Keyword search a document

Search for a document keyword via the toolbar in the top right. Your keyword will be highlighted throughout the document which saves you time searching for specific words or phrases.

Make your first note

Click on the Note button and click anywhere in the document to make your first note. These are useful for making quick notes as you read a paper and can be placed anywhere on the document.

You can make more detailed notes in the toolbar on the right hand side, which are searchable.
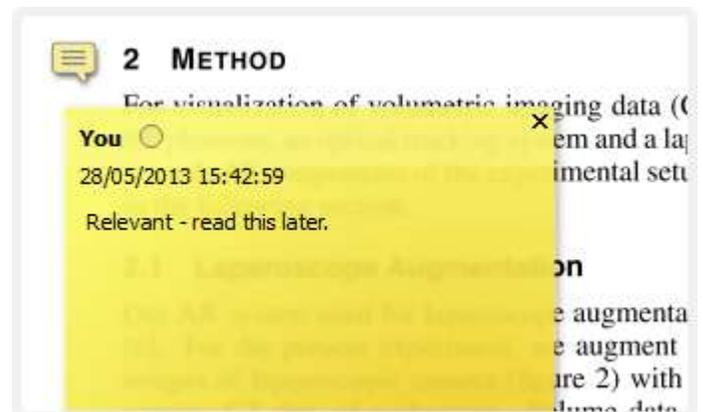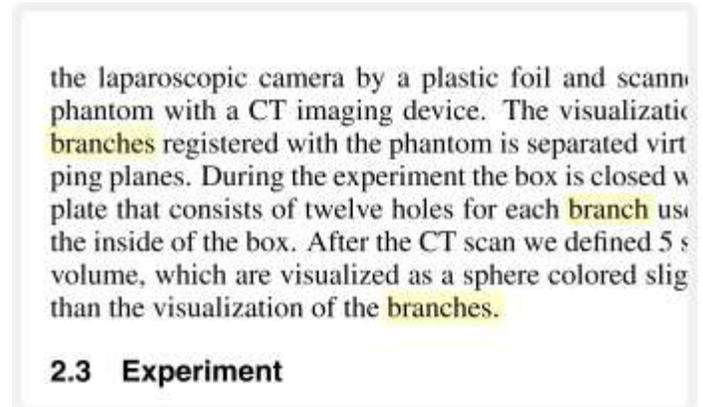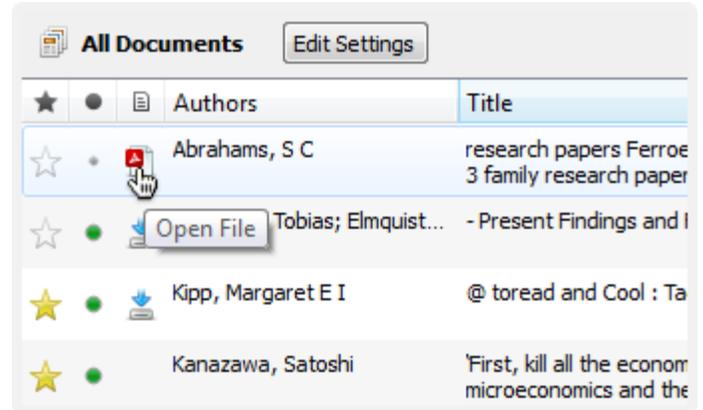
Discover, add and import new content

Save content from around the web into your Mendeley account in just a few clicks.

Discover with literature search

Select the Literature Search tab on the left hand pane to search and add papers from the Mendeley catalog. To add documents, simply click "Save" on the right hand pane or drag and drop articles to any folder or group that you're a member of.

Tip: Advanced search operators can help you refine your search.

Import content with the Web Importer
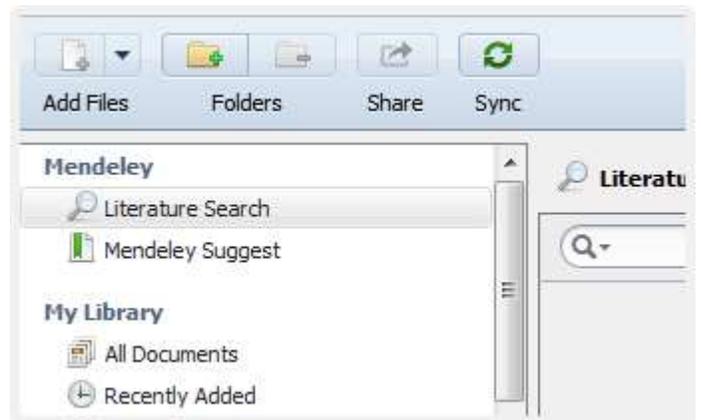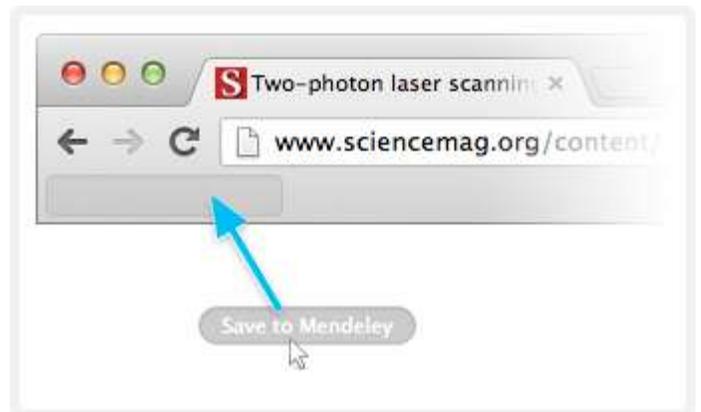
Save online content directly to your Mendeley account with the Web Importer bookmarklet. Import content from a wide range of sources and academic databases.

Auto-add documents with a Watch Folder

Setting up a Watch Folder in Mendeley is one of the most versatile ways of quickly importing documents. Simply drop PDFs in the folder and Mendeley will import them automatically for you.

To setup a Watch Folder:

1. Select the 'Watch Folder' option from the add files menu in the main toolbar and browse to the folder containing the documents you're interested in.
2. Mendeley will add each document to your library, scanning each one for useful details such as title, author and journal.
3. Any subsequent documents added to the folder will automatically be visible in

Mendeley.

Get started with the citation plugin

Quickly create and format your citations and bibliography according to your chosen style.

What is the citation plugin?

The Mendeley citation plugin allows you to cite seamlessly without leaving your word processor. You can create a bibliography and all the references you add will automatically be added to the end.

The Plugin is compatible with Word, OpenOffice and Bibtex.

Install the Citation Plugin

Make sure you have Mendeley Desktop open and goto 'Tools' in the main toolbar to click 'Install MS Word Plugin'. The Plugin is compatible with Word, OpenOffice or Bibtex.
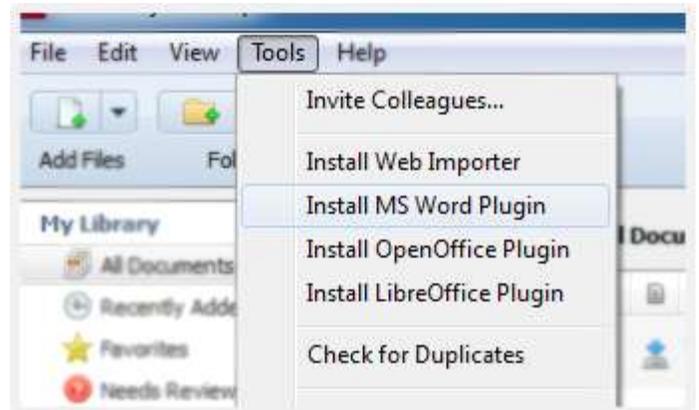
Installation success

You should see this screen which means the plugin is installed and you're ready to open Microsoft Word.
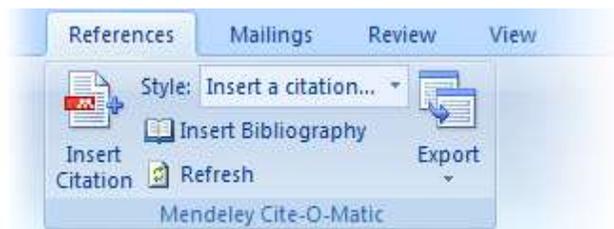
Finding your citation style

Click View → Citation Styles → More Styles to search for citation styles on Mendeley. In the Get More Styles tab you can search for other styles e.g. "Harvard", "Imperial" or "Durham" and install them in one click.

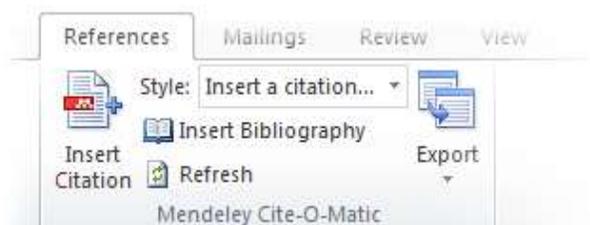Mendeley has thousands of styles from all the top journals and institutions worldwide.
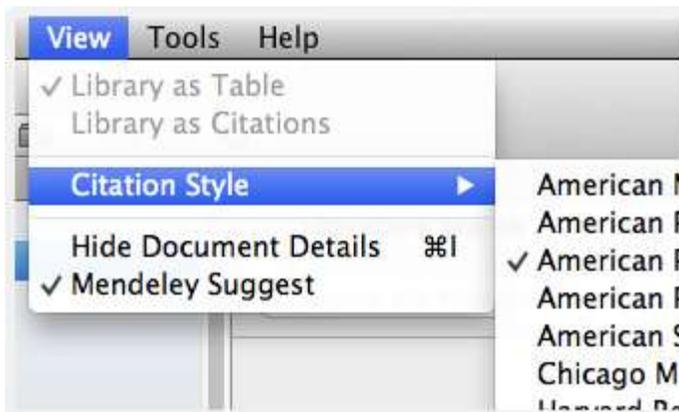
Citing a document from within your library

From the Mendeley citation toolbar you can automatically insert formatted citations or generate a bibliography for your paper. To generate citations in MS Word or Open Office you can watch this video for a quick demo.

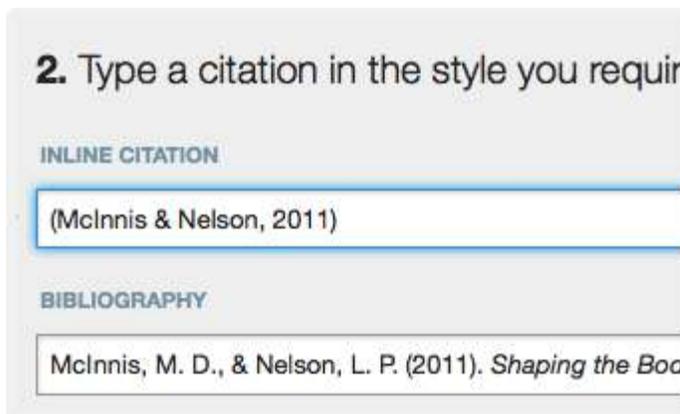## Advanced: The Citation Style Editor

Start editing your own citation styles with the open source Citation Style Editor, produced in collaboration with Columbia University Libraries.

To get started we recommend this tutorial.

Synchronize across devices

Mendeley Sync lets you synchronize your data across devices so access your research wherever you go.

Why is Sync useful?

Sync makes it easy to get up and go and have all your research waiting for you on your home computer, work computer, iPhone or iPad - just the way you left it.

How does it work?

When you click Sync in Mendeley Desktop, your Mendeley data will be securely stored on our servers so you can access it on any machine anywhere you go. Notes in groups will also be available to others after clicking Sync.
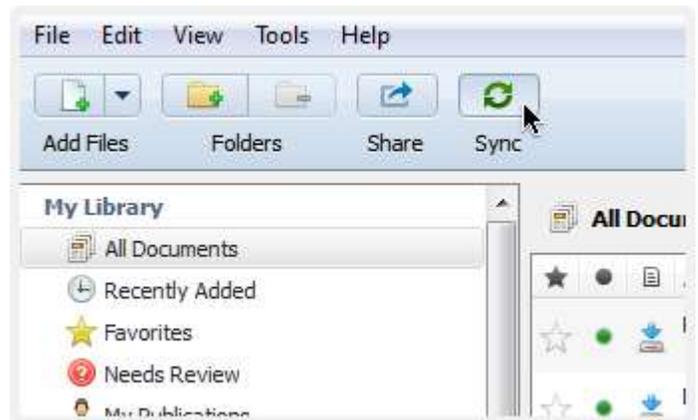
Where's all my data?

Your data is safely stored on Mendeley's servers. Mendeley will never publish private or personally identifiable data. No one will ever know what you are currently researching or reading, unless you explicitly decide to share this data with other researchers.

You can see our privacy terms for more information.