

MENDELEY: FREE REFERENCE MANAGER AND PDF ORGANIZER FOR RESEARCHERS AND LIBRARIANS

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ABSTRACT

Mendeley is a free software tool for organizing pdf files in your desktop and to collaborate with peer researchers by exchanging information. It also helps us to create bibliographies and insert citations in the articles. This paper gives an overview on the use of the Mendeley and its features.

Keywords: Open Source Software; Mendeley

1. Introduction

Mendeley is a desktop and online program for managing and sharing research papers, finding research data and creating bibliographies. It allows researchers to collaborate with each other online. Mendeley has two platforms, i.e. a pdf and reference management application which can be installed on a desktop and the Mendeley web, an online social network for researchers. Those who want to use the online platform need to register themselves.

Mendeley was founded in 2007 and is based in London. It was a team effort of a group of researchers, graduates and Open Source Software developers. The software is not Open Source. However it is freely available for use and can be downloaded from the website www.mendeley.com. Name and e-mail address are to be provided for downloading the software. It can be downloaded and used with an existing facebook account.

2. Features of Mendeley

The prominent features of Mendeley are:

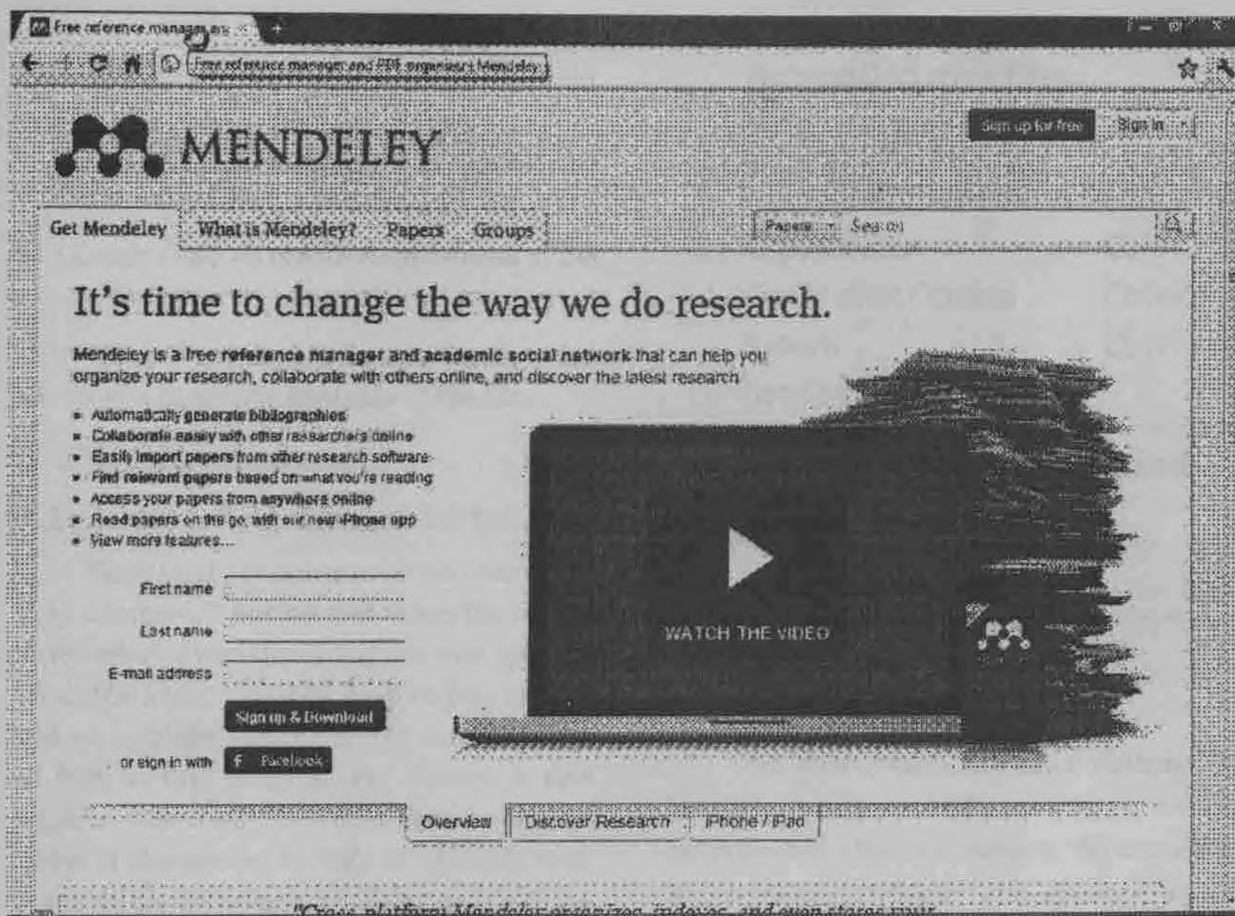
1. It works on Operating systems like Windows, Mac and Linux.
2. It extracts Metadata from pdf files.
3. It backs up data and can be synchronized with multiple computers using a single online account.
4. It has a pdf viewer facility with sticky notes, text highlighting and full screen reading.
5. It allows full text search across papers.
6. It can be used to create bibliographies.
7. It can be used to cite references in MS Word and Open Office word processing softwares.
8. It can import documents and research papers from remote servers like PubMed.
9. It has the facility to tag and annotate research papers.

3. Installation

Installation of Mendeley from the web is a very simple process. Log on to www.mendeley.com. On providing the name and e-mail address, the site allows to download the software. The next screen will prompt us to give a pass word and to

indicate the research area and status. Then click on the "Create my account".

The website will take you to the "Download Mendeley desktop" screen. On clicking the green button the software gets downloaded into the system. Double click the exe. file and install the software on the system.



4. Mendeley Interface

As described earlier this software has a desk top interface and an online interface. The desk top interface can be invoked by double clicking the desktop icon "Mendeley" which appears on the desktop after the installation of the software. It has title

bar, menu bar and ribbon of button. On the left hand side a panel named as "My library" is available.

It has two other buttons named "Groups" and "Trash". The lower portion of this panel allows various filter options for searching in the library.

On clicking on the added file, you can see the details of the document (metadata) on the right hand side panel. The metadata available with the pdf file is captured by the software. All the common elements related to a type of document (e.g. journal article) are available on this panel. We can add or modify the required details manually also.

A file added to the library can be opened by the following ways.

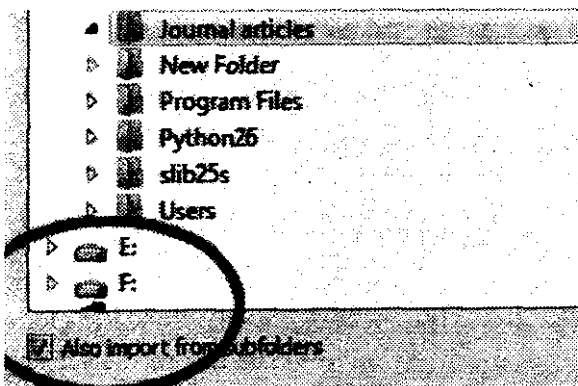
1. Double click on the name of the file in the library
2. Single Click on the file icon on the left side of the file name in the library.
3. Single Click on the file name shown in the metadata.

The pdf viewer opens a new window and allows you to see the contents of the file.

6. File Management

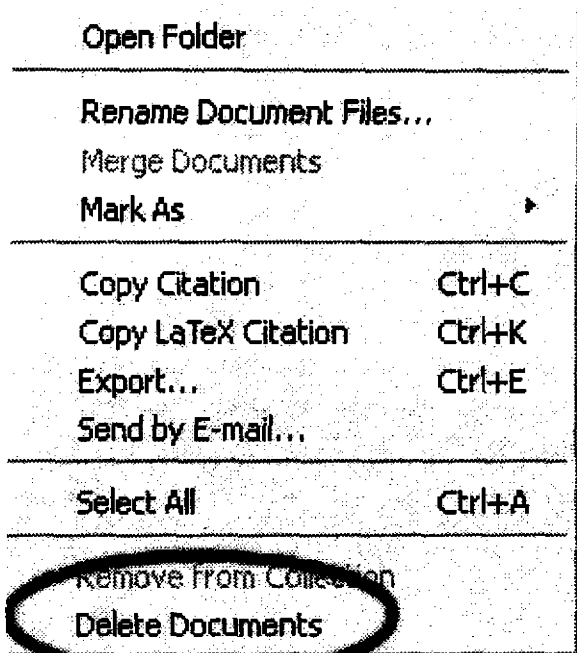
6.1 Adding files from a folder

Click on the downward arrow near to the "Add document" button and select the option "Add folder". From the dialog box that appears select the folder in which the files you want to add are available. Click OK. The software adds all files in that folder to the library. It also imports files from the subfolders inside the folder, if the option for this is selected. It is available on the bottom left hand corner of the dialog box.



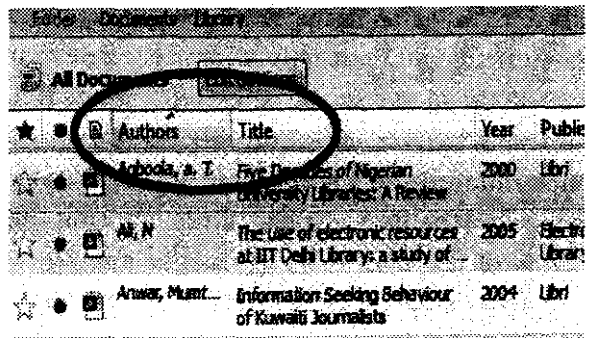
6.2 Deleting a file

Select the file to be deleted, right click and select the option "Delete documents" from the pop-up menu. The document gets deleted. In the ribbon of buttons "Delete Documents" option is available which also helps to delete a selected document.



6.3 Creating folders

We can create folder/s within "My Library" with specific names to collect references of a specific subject. We can delete by selecting the folder and clicking on the "remove folder" option on the ribbon.



6.4 Searching documents in Mendeley Library

The documents can be arranged alphabetically by the names of the authors, title, journal name etc. Click on the button author in the library and the documents will be arranged alphabetically from a-z as per the names of the authors. One more click on the same button reverses the order, z - a. The feature is available with title, year etc.

On the right side of the menu button, a text box is available where you can type the particular word to be searched. The list of documents having that particular word in any field or within the text will be selected and shown.

6.5 Creating a bibliography from the library

We can create a bibliography from the Mendeley library. To select all documents use Ctrl+A and to select non-consecutive documents press Ctrl key and click on the required documents. After selecting the documents press Ctrl+C (Copy citation command under the Edit Menu). The copy citations can be pasted in a word processor file. You can opt for various citation styles. The list of various styles is available under the View - Citation Style Menu. Select the required style before you copy the citation.

7. Adding Metadata manually

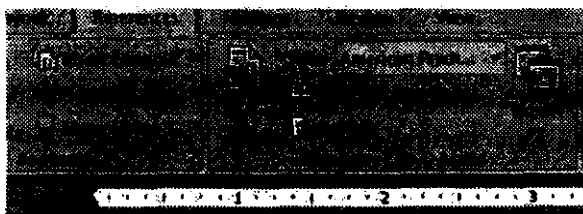
After adding a document into Mendeley library you can add metadata by selecting the document and manually adding the relevant metadata elements on the right hand side panel with the tab named "Details" in metadata, to add a second author press enter key after the first author. While entering the name of the author the sequence should be last name and then first name with a comma in between.

In the Mendeley library there are three icons on the left side of the name of the document namely a star, a dot and file. The star icon can be clicked to denote that the file is a favorite item. The dot icon on adding the file will be green in color. It will become colorless after we open the file indicating that the file is already open and read. It can be clicked back to the green showing that it is not read. A document also can be categorized as "Needs Review" by right clicking on it and selecting the option "Mark As" and the "Needs Review".

8. Mendeley Cite-O-Matic

This is an integration of the Mendeley software with the Word processing software MS-Word. This can be integrated in the MS-Word software by using the "Install MS-Word Plug-in" under the tools menu of Mendeley.

To insert citation and bibliography in MS-Word go to the "References" Menu, and click on the "Insert Citation" button (or press Alt+M).



The cursor should be located exactly where you need the citation in the text. A dialog box pops up, where you can see a button "Go to Mendeley".



Clicking on this will take you to the Mendeley Library. Please see that the Mendeley Library is open, while you do this process. From

the library, select the required file to be cited and click on the "Send citation to the Word Processor" button in the Mendeley interface. You can see that the citation is inserted.

After inserting all citations click on "Insert bibliography" under the References Menu. This will provide you the exhaustive list of documents referred by you according to the style you prefer.

To edit a citation in the Word processor file, select the citation. You can see that the "Insert Citation" button has changed to "Edit Citation". Clicking on the button will again take you to the Mendeley Interface, where you can make changes in the metadata. Click on the "Send citation to the Word Processor". The changes will be incorporated and reflected in the bibliography.

Sticky Notes

We can place notes in an open document. When you right click on an open document the button "Add Note" pops up. Clicking on this option, an yellow note opens up with the name of the user with date and time. We can add necessary notes in these sticky notes. This will remain in the file and can be retrieved later, as there is an indication with the symbol of a "call out". This will help you to recollect your noting about the article.

9. Conclusion

The Mendeley software thus provides a very good platform to organize the literature we collect for our research. It also helps to create bibliographies according to internationally accepted styles. Peer

researchers can share information over the online platform of Mendeley. Hence it is a very useful software platform for researchers as well as librarians.

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