MENDELEY
Migration Guide

How to migrate from other reference management tools to Mendeley

One benefit of Mendeley is that it can import references from other reference management tools. For step-by-step instructions, select the tool you're currently using:

RefWorks to Mendeley   **EndNote to Mendeley**   **Papers to Mendeley**   **Zotero to Mendeley**

How to migrate from RefWorks to Mendeley
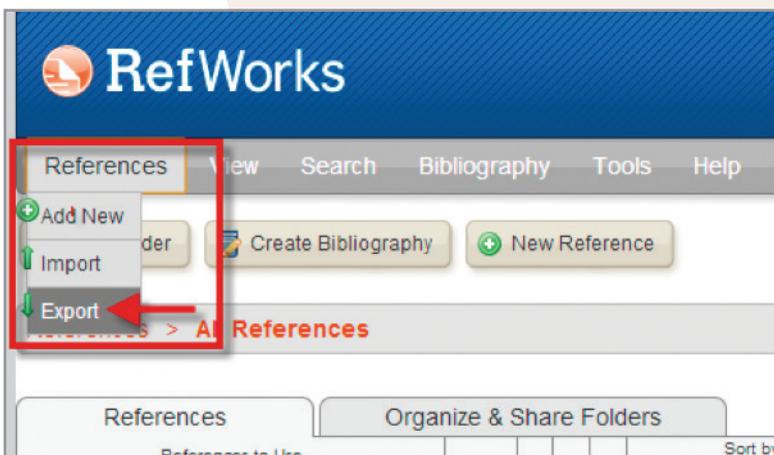
1. Log in to your RefWorks account

2. At the top left, select
   References > Export
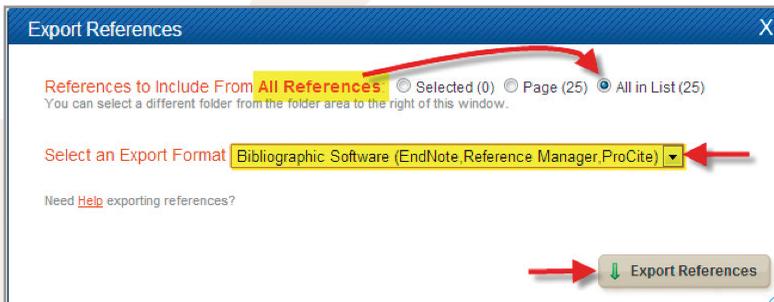
3. Under 'References to include'
   select either:

   a. 'All References' to move all references in one folder, or,

   b. To preserve your RefWorks folder structure while migrating to Mendeley, select each folder individually. Tip: Open the folder you want to migrate first, and then click 'Export'
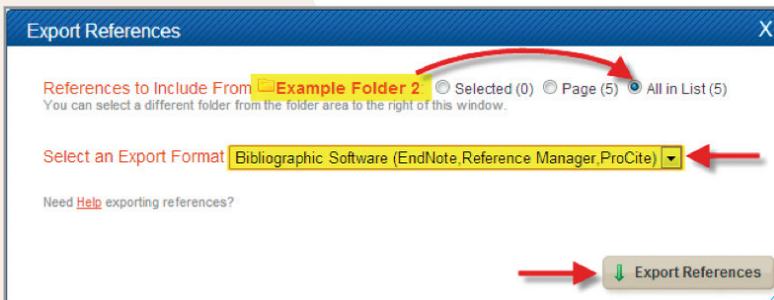
4. Under 'Export format' select 'Bibliographic Software (EndNote, Reference Manager, or ProCite)'

5. Click 'Export'

2
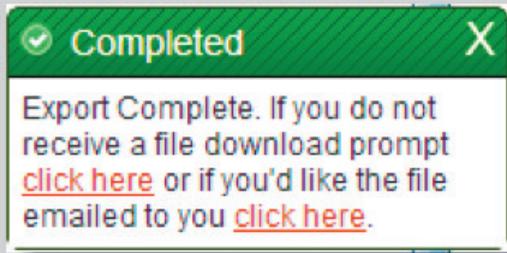
6. A new window or tab will open in your web browser, displaying your references. Go to the file menu and select 'File > Save as (or Save Page As, depending on your browser).' Save the file as a Plain Text file (TXT). Note: if you do not receive a download prompt, look for the 'Completed' box and click the 'click here' link

a. 'All References' to move all references in one folder or,

b. To preserve your RefWorks folder structure while migrating to Mendeley, select each folder individually. Tip: Open the folder you want to migrate first, and then click on 'Export'
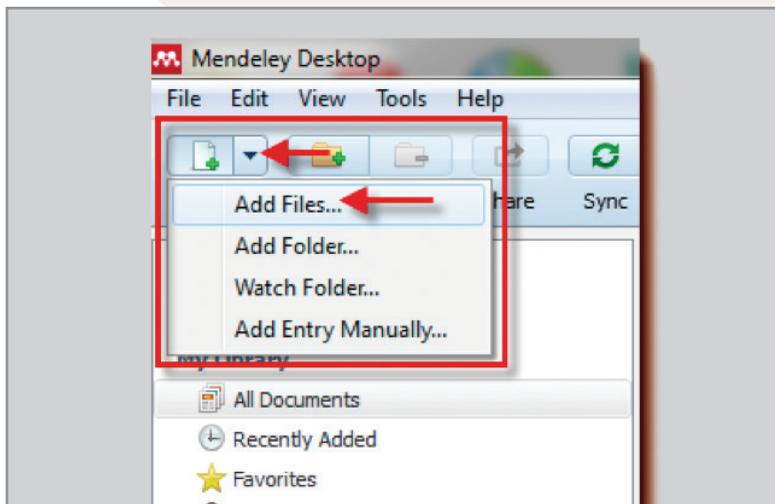
7. Enter a filename in the 'File Name' box

8. Click 'Save'

9. Close out of RefWorks and open Mendeley Desktop

10. Click 'Add Files' and select 'Add Files'
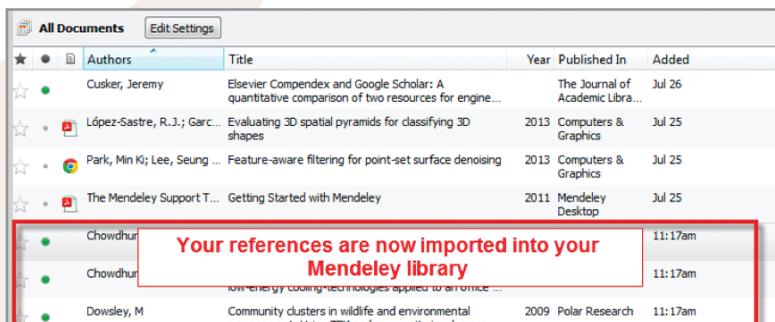
11. Browse for the file(s) you exported from RefWorks and click 'Open'

12. Your references will now be imported into Mendeley under 'My Library'
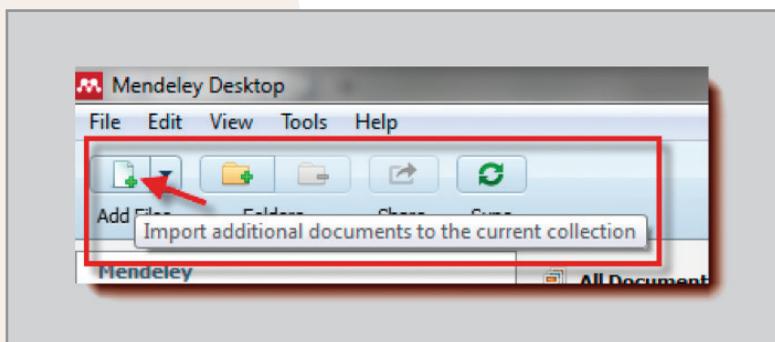
Note: Attachments in RefWorks will not be exported. You will need to save these individually to your computer and then import them into Mendeley. Once imported, Mendeley Desktop will attach them to the appropriate references in Mendeley. To import documents into Mendeley:

a. 'In Mendeley Desktop, click 'Add papers'

3
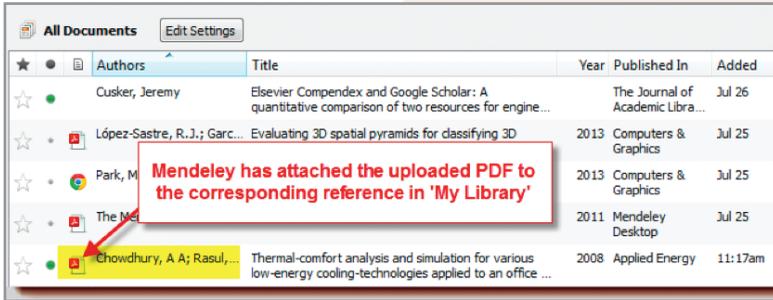
b. Browse your computer and select the documents you wish to import

c. Click 'Open'

d. Mendeley will pair your imported documents with the corresponding reference
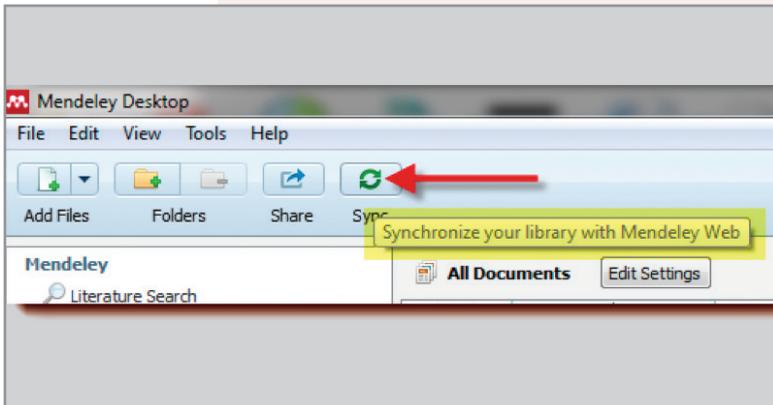
13. Once migrated, your RefWorks descriptors will appear as Mendeley keywords

14. Note: Data in the User Fields section will not be imported to Mendeley. Copy that data into the 'comments' area before exporting or importing"

15. Also, once finished be sure to click on the 'Sync' button located at the top of the page. This will synchronize your Mendeley Desktop data with your Mendeley Web account

How to migrate from EndNote to Mendeley
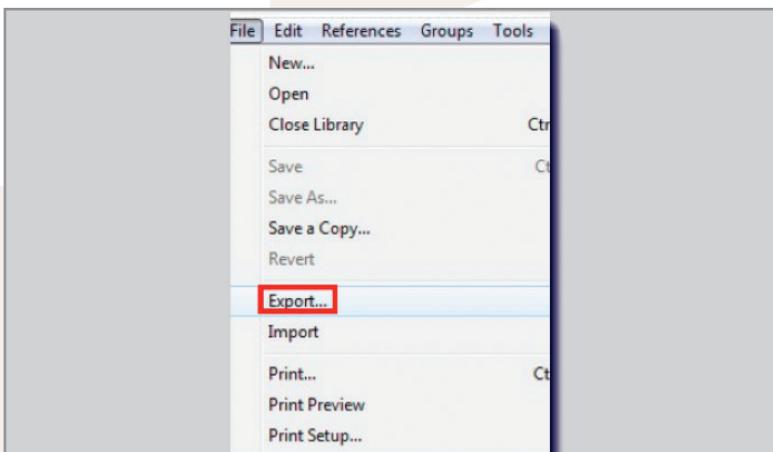
To import your EndNote library, you first need to export your references to an 'EndNote XML' file and then import that into Mendeley Desktop.

1. Open EndNote and select File > Export

2. Select the references that you want to import into Mendeley Desktop
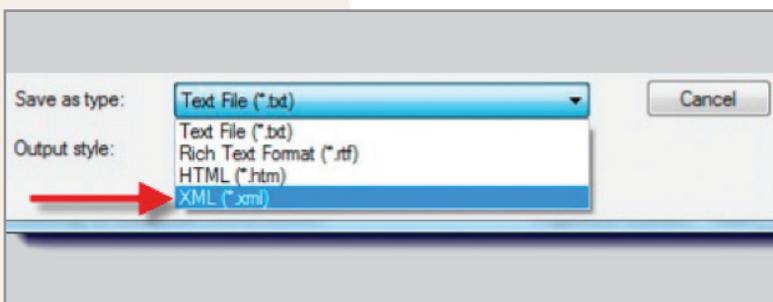
3. In the window that appears, look for a box labeled 'Files of type' or 'Save as type' and select 'XML (*.xml)'

4. Enter a name for the file

5. Click 'Save'
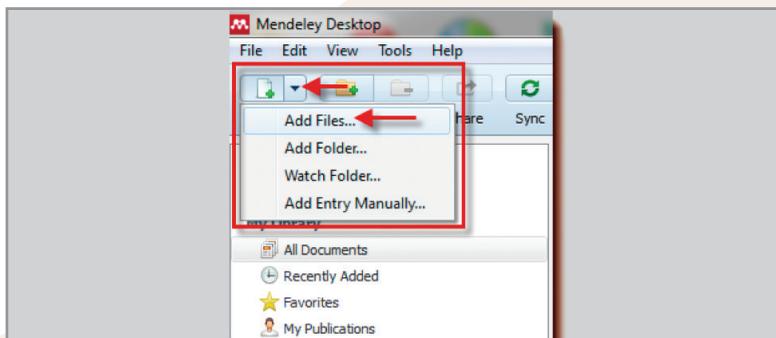
6. Open Mendeley Desktop

7. Click 'File' and select 'Add Files'

8. Select the file that you exported from EndNote and click 'Open'
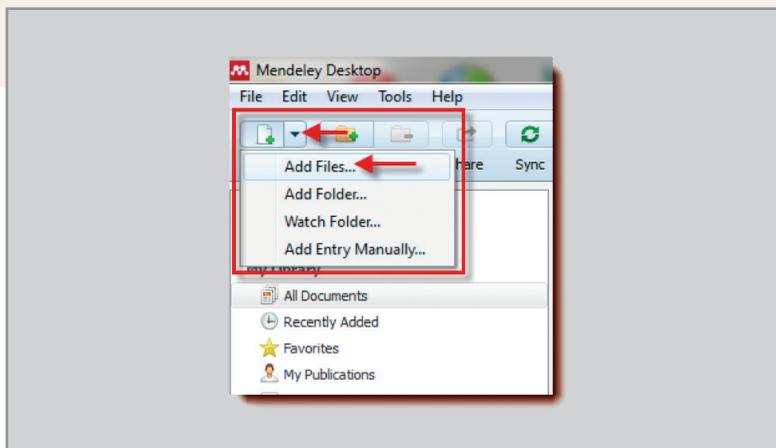
In addition to the EndNote XML format, you can also export references to Bibtex and RIS format in EndNote to import into Mendeley Desktop. To do this:

1. Open EndNote and select 'Edit'

2. Click on 'Output Styles' and select 'Open Style Manager'

3. In the list that appears, tick 'Bibtex Export' and 'RefMan (RIS) Export'

4. Close the window and go to 'File'

5. Click 'Export'

6. Select 'Text File'

7. In the box labeled Output Style, select either 'Bibtex Export' or 'RefMan (RIS) Export'

8. In the filename field, enter a name ending in ".bib" for 'Bibtex' or ".ris" for 'RIS' export

9. Click 'Save'

10. Close EndNote and open Mendeley Desktop

11. Click 'Add Files' and select 'Add Files'

12. Browse for the file(s) you exported from EndNote and click 'Open'

13. Your references will now be imported into Mendeley under 'My Library'

14. Once you are finished importing your files, be sure to click 'Sync' at the top of the page. This will synchronize your Mendeley Desktop data with your Mendeley Web account

5
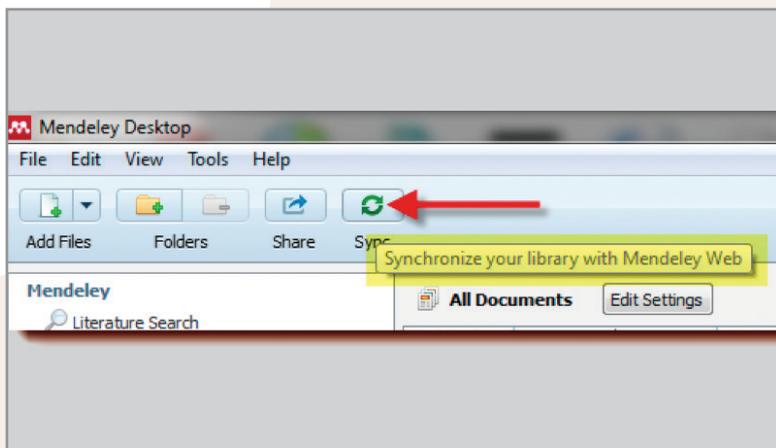
How to migrate from Papers to Mendeley
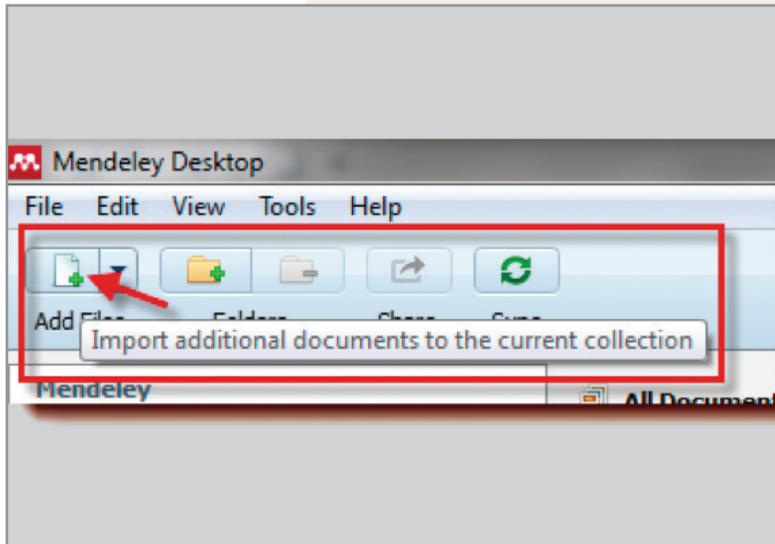
To import your Papers library into Mendeley Desktop, you will first need to export your references to a Refman RIS file.

1. In Papers, select File > Export and select 'Refman RIS file'

2. Go to the 'Save as' field and type in a name for the exported file

3. Go to the 'Where' field and browse the drive/folder where you want to save your library file

4. Click 'Export'

5. Open Mendeley Desktop

6. Click 'Add papers'
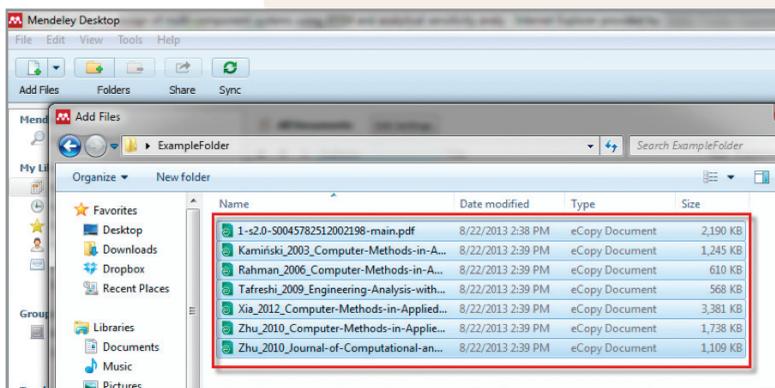
7. Select the file you exported from Papers

8. Click 'Open'

9. Your papers will now be imported into Mendeley under 'My Library'
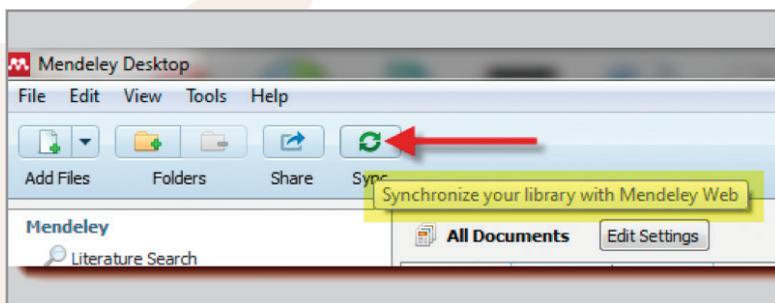
10. Once you are finished importing your files, be sure to click 'Sync' at the top of the page. This will synchronize your Mendeley Desktop data with your Mendeley Web account

6

How to migrate from Zotero to Mendeley

Mendeley Desktop supports importing your documents directly from Zotero. **To do this, you'll need to install Mendeley Desktop on the same computer where you have Zotero installed.**
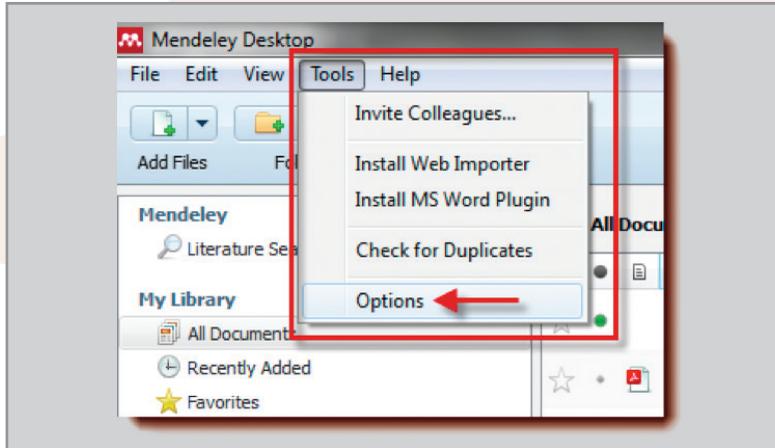
1. Open Mendeley Desktop

2. Go to 'Tools' and select 'Options'
   If you are on a Mac, go to 'Preferences'

3. In the pop-up window, select the 'Zotero' or 'Zotero/CiteULike' tab
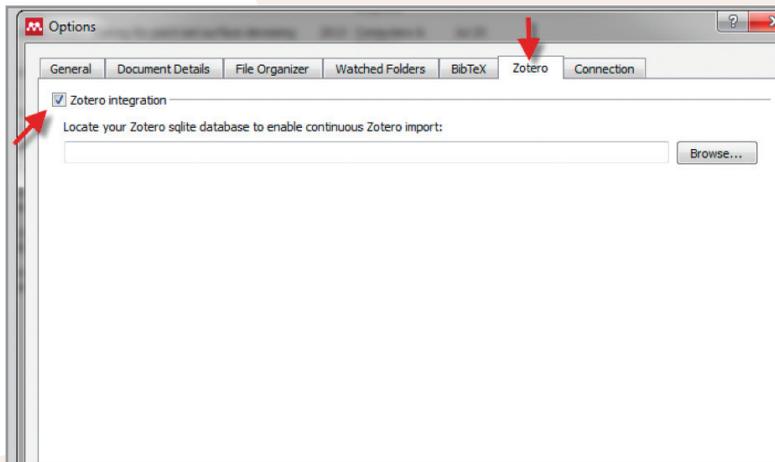
4. Tick the box next to 'Zotero integration'

5. Mendeley Desktop will attempt to automatically locate your Zotero database. You can choose to use an alternate Zotero database

6. Click 'Apply' and then 'Ok'

7. Once you've clicked 'Apply, all of your existing documents from Zotero will be imported into Mendeley Desktop. Additionally, any items you add to Zotero in the future should automatically upload to Mendeley Desktop
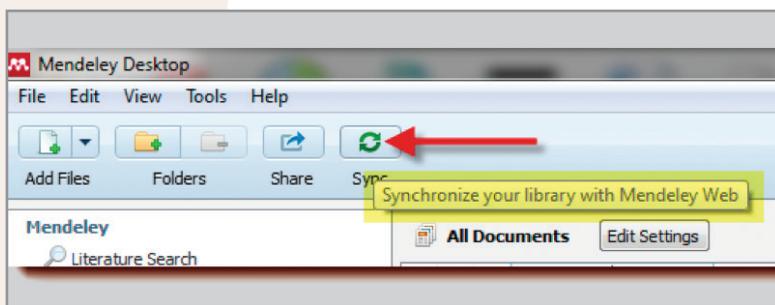
8. Be sure to click on 'Sync' at the top of the page. This will synchronize your Mendeley Desktop data with your Mendeley Web account

www.mendeley.com

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10.2013