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Step-by-Step Procedure to Cite References from Mendeley and Reference Management Software in LaTeX Journal Articles, Conference Papers, Study Thesis, Dissertation, CV's and Research Proposals

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Abstract

Scientists, Engineers and Researchers are often faced with technical difficulties to cite references from different reference management software in LaTeX. We share experiences to help new researchers to integrate BibTex references from Mendeley, Zotero, RefWorks, EndNote, Qiqqa and other platforms into .tex files on the Latex format for Research Proposals, Thesis, Dissertation, or when writing their first journal article, conference paper, research portfolio or technical newsletter. Mendeley and other reference managers can import reference libraries such as BibTeX (.bib) files, Endnote XML, Research Information Systems RIS (.ris) and Zotero Library (zotero.sqlite) file formats. This report describes the process in simple terms and was developed out of a need to describe to numerous students how to accomplish this relatively simple task. It describes the practical side on how to cite references in LaTeX using Mendeley and other citation reference managers and will help to simplify Bibliography creation with such software. It also shows the commands passed to the LaTeX compiler that determines the format of Bibliography references, such as for example Harvard Method, or Harvard Referencing Style, Parenthetical referencing, author-date method, author-title style, MLA style, Numbered-APA-style, scientific square brackets method, Vancouver referencing style, etc.

Keywords: Mendeley; LaTeX; Bibliographic References; Research Information

Systems; Publishing Support; Scientific Publications; Bibliography; Bibtex; Scientific Writing; Harvard Referencing; Scientific Referencing;

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1. Citing in LaTeX

We assume you have first created a database of references stored in a .bib file. Before we continue on with the process of illustrating how to link and cite reference management software references (such as Mendeley and other reference management libraries) in LaTex, let's look at an example on how to cite a BibTeX reference in the .tex file. We use the image in Figure 1 to show how references from a Mendeley library file (called "library.bib") is included in the text of an example LaTeX file (.tex) [1].

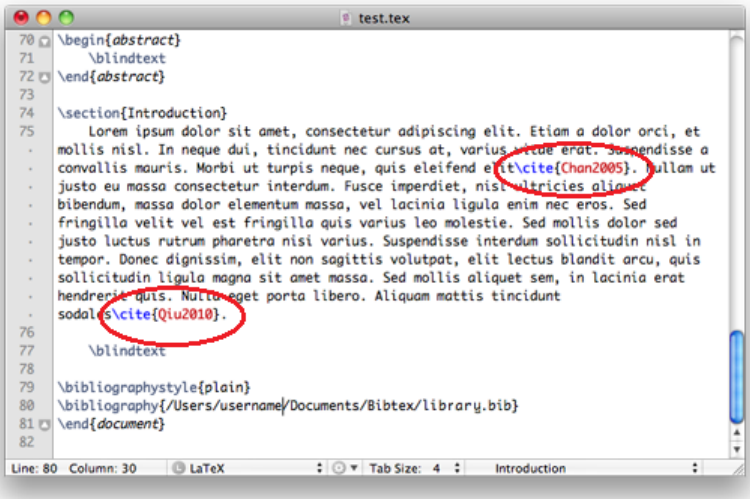

Figure 1: Dummy text with two citations from a Mendeley "library.bib" file to illustrate the use of references in LaTeX [1].

The illustration includes dummy text wherein the reader can see two citations from a Mendeley "library.bib" file. The first is in the third line of the Introduction and the second in the last line of the Introduction (Figure 1).

The example in Figure 1 include the references or citations for \cite{Chan2005} and \cite{Qiu2010} embedded in the text of the .tex file [1]. By adding a "p" to the "cite" reference command, for example \citep{Qiu2010}, will add "p"arenthesis or brackets around the reference.

At the end of the LaTeX file, just before the \end{document} command, make sure the following is inserted \bibliography{library.bib} as shown in Figure 2. This command is required to import the Mendeley library file "library.bib" from the appropriate directory on your computer.

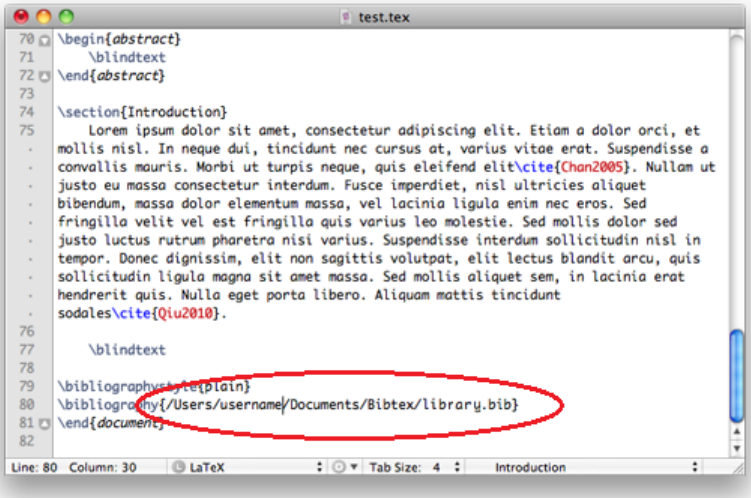

Figure 2: LaTeX command to include Mendeley "library.bib" file in the LaTeX document [1].

2. Defining the Bibliography Style

How to make citations appear within square brackets [ ] instead of the normal parentheses ( )? Firstly make sure that your .tex file (in TeXmaker) includes a "bibliographystyle" command in the beginning of your LaTeX document as shown in the above example. That is, make sure there is a command like \bibliographystyle{plain} or \bibliographystyle{agsm}before the LaTeX \begin{document} command in your TeX file.

In a typical .tex document, you will have something like the typical sequence or chain of command such as:

\documentclass{article}

\usepackage{natbib}

```
\bibliographystyle{agsm}
\begin{document}
...
\bibliography{<your-directory-and-your-bib-file-name>}
\end{document}
```

This command tells the LaTeX compiler in which format the Bibliography references must be saved, for example Harvard Method, or Harvard Referencing Style, Parenthetical referencing, author-date method, author-title style, MLA style, Numbered-APA-style, scientific square brackets method [3], Vancouver referencing style, etc.

You thus have to select a \bibliographystyle{***} command that describes the style you require your references to be in. Alternatively, you can add the LaTeX command \setcitestyle{square} in the preamble of your .tex document without modifying the class file itself.

3. Name or Capture a Publication in Mendeley

On Mendeley - right hand of the screen - each reference has what is called a "Citation Key:" as shown in Figure 3.

If this "Citation Key:" bar is not shown on your screen, then follow the following procedure to activate this bar in Mendeley:

1. In Mendeley click Tools (top of screen) and select Options,
2. In the Options Window, click the option Document Details
3. Few lines down in the list, you will find the term "Citation Key:", make sure it is selected on the left.
4. Repeat this procedure by selecting different type of documents in the dropdown menu on the top of this window where it says Document Type
5. Click Apply and OK to save these options.

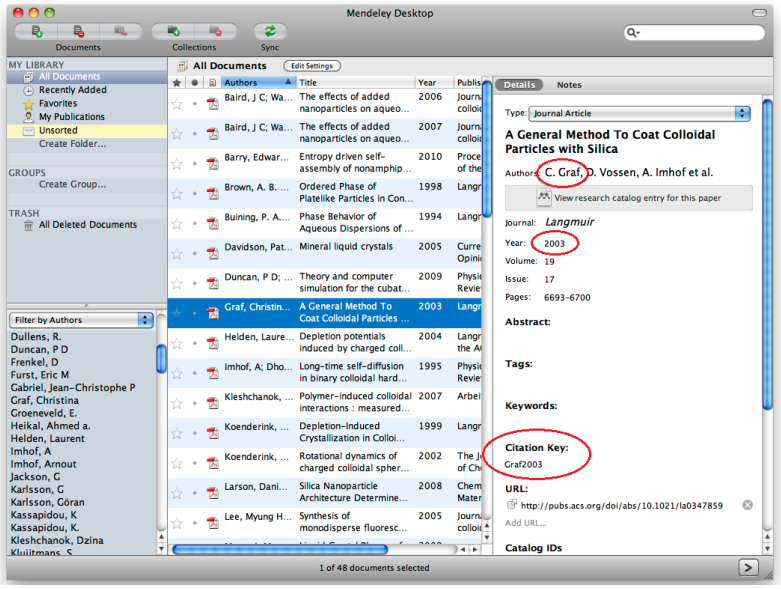

Figure 3: Mendeley screen to show the "Citation Key:" bar or field [2].

The "Citation Key:" bar will now show on your Mendeley screen as shown in Figure 3. If you dont see a field marked Mendeley Citation, follow the instructions in the next section, otherwise skip this section and proceed to the next.

4. What if I dont see Mendeley Citation Key Field ?

The citation key field is generally not be visible by default, so this field needs to be activated. Go to the menu, Tools, Options, Document Details, then choose the document type (for instance Journal Article), then check the Citation Key box. After this, the Citation Key field should be visible in the details pane on the right hand side of the window [3].

The "Citation Key:" bar will now show on your Mendeley screen as shown in Figure 3. If you dont see a field marked Mendeley Citation, follow the instructions above, otherwise proceed to the next section.

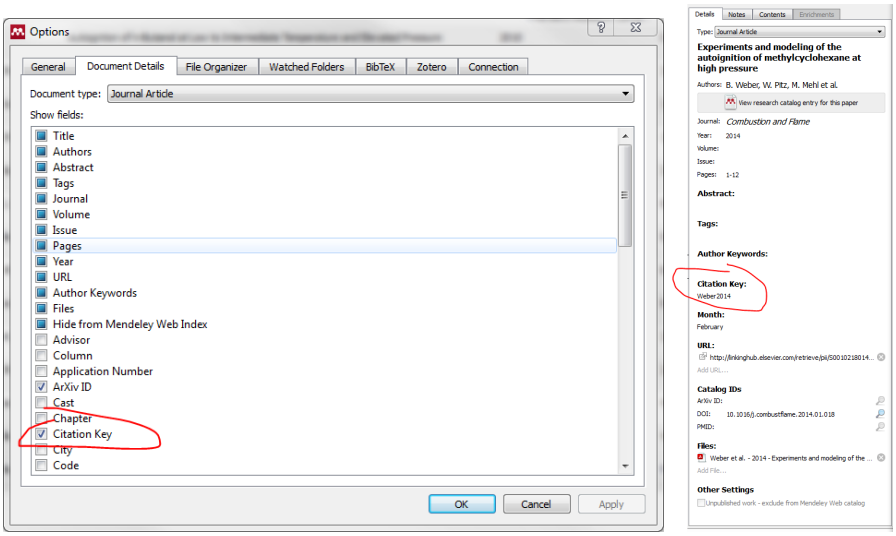

Figure 4: Mendeley Tools/Options screen to switch "Citation Key:" bar or field on [3].

5. Manually Insert a Citation in Mendeley

If a reference Citation Key: field is empty in one of your Mendeley references, insert the first author surname and date in this field i.e. Graf2003 as shown in Figure 3. This is the exact citation key you must use in .tex file, for example \cite{Graf2003}.

6. Process to Get Mendeley References into LaTeX

Figure 5 will be used to help show how the reference in Mendeley is compiled saved and included in the text of an example LaTeX file (.tex).

Step-by-Step Procedure to include Mendeley References in LaTeX Journal Articles, Conference Papers, Study Thesis, Dissertation and Research Proposals:

1. Once you have your references in Mendeley, the press the **Synch** button, green circular arrows middle top of screen (see Figure 5). This "compiles" and saves your "library.bib" file that you need to import in LaTeX.
2. To see where on your computer Mendeley saved this file "library.bib" - in Mendeley click Tools (top of screen) and select Options, then click on the

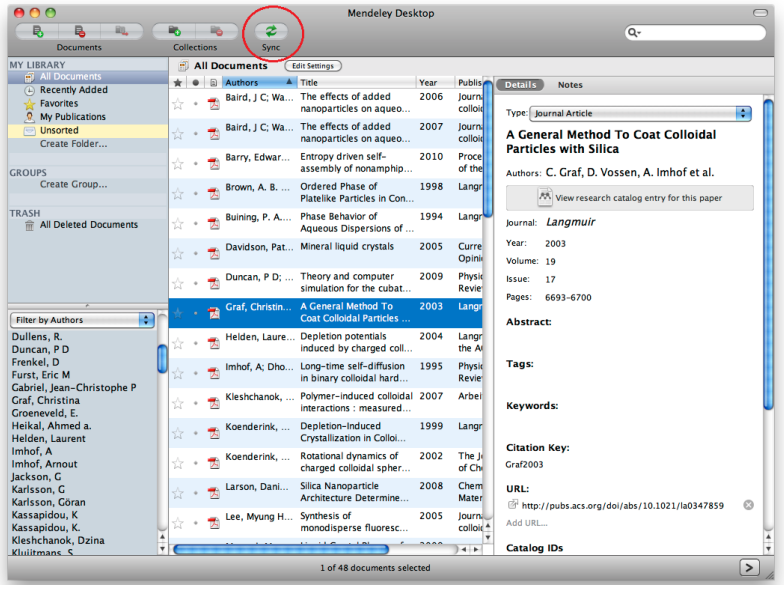

Figure 5: Mendeley screen to show the Mendeley "Synch" function [2].

BibTex tab.

3. Close to bottom of the window, just above last line, there is shown a Path line and bar - remember this path, as this is where Mendeley saves your Mendeley library file "library.bib". Alternatively you can edit this path or browse a new location but best to keep this path simple and at a generic location, such as for example the MyDocuments folder on your computer.

We will now need to copy this library.lib file from the Mendeley folder and paste it in the folder you selected in LaTeX as shown in Figure 2. The next few steps you need to follow to transfer the Mendeley library.lib file to the folder on your computer where the LaTeX compiler will search for the file and will read it from:

1. Go out of Mendely, copy this file "library.bib" in your computer folder and paste it in "library" folder of your LaTeX proposal, LaTeX as shown in Figure 2.

2. You need to copy and replace the old "library.bib" file, to overwrite the file if an older version of the file exists every time you add new references to Mendeley and "compile" Mendeley).
3. Alternatively you can rename the old library.bib file to library2*.bib to keep the older copies in the LaTeX folder.

You are now ready to compile your LaTeX .pdf file and see the Mendeley references included in your document:

1. Go into the LaTeX editor and press the compile or "build" option (F6 shortcut key) and wait for the compiler to finish the process. In this first round of compilation, the LaTeX editor summarises all the citations it finds in your .tex document.
2. Now hit the F11 key once, and wait for the library file to compile. This compiles the library file based on the list of citations found by LaTeX in your .tex document.
3. Then hit F11 key a second time and wait for the library compiler to finish its second round of organizing the citations.
4. Then hit F11 a third time and wait for library compiler to finish its third round of organizing of citations in the correct sequence.
5. Now select the LaTeX compile "build" again (F6 shortcut key) - and wait for the LaTeX compiler to finish.
6. You can now check if your Mendeley references appear correctly in your .pdf file (I often search for question marks in the .pdf document as LaTeX uses the "?" sign if a reference is not found).

The last few repeating steps are quite important and will save you a lot of frustration. It is required to compile more than once as this helps the LaTeX editor to read the references, organize the references and re-rank the references in your publication to follow the right sequence in numbering from the top to the bottom of your document.

7. Troubleshooting- Mendeley References NOT in LaTeX

If you have compiled your LaTeX .pdf file and see that some of the Mendeley references is not included in your document (and you see "?" marks instead of references) then do the following:

1. Compile ("build") again (F6 shortcut key)- as per the steps described above.
2. Check the date of the library.bib file in the folder read by LaTeX, see if the file is the latest version of the Mendely compiled library.bib.
3. Check your Mendeley records and see if the Citation Key: you used in Mendeley is exactly the same as the reference your called in LaTeX.
4. Check when you press the F11 key, if it shows a message such as \BibTex not found in aux file" or This is BibTeX, Version *.** (MiKTeX *.*) The top-level auxiliary file: ***.aux I found no \bibstyle command—while reading file ***.aux (There was 1 error message), then you miss a "bibliographystyle" command in your .tex file and need to add something such as \bibliographystyle{plain} in the preamble of your .tex file (see Section 2 above).

8. Repeat Process for Every New Reference Added in Mendeley

Remember that every time you enter new references into Mendeley and you want these to appear in your publication or document, you will need to follow the steps above. Insert the reference in Mendeley, hit the Mendeley Synch Button, copy the file from the Mendeley Library to the LaTeX library, compile/build/F6 LaTeX once, hit F11 three consequtive times, compile/build/F6 LaTeX again and your new reference will be included. Trust these notes will help.

9. Final Resources, Basic Tips and Tricks

How to cite in LaTeX using Mendeley?

`http://tex.stackexchange.com/questions/180059/how-to-cite-in-latex-using-mendeley`

HOW TO: Use Mendeley to create citations using LaTeX and BibTeX:
http://blog.mendeley.com/2011/10/25/howto-use-mendeley-to-create-citations-using-latex-and-bibtex/

Latex with Mendeley : Bibliography (Latex Tutorial):
https://www.youtube.com/watch?v=772BeD2fHIQ

Getting started with Mendeley:
http://desktop-download.mendeley.com/download/misc/Getting_Started_Guide.pdf

Mendeley Reference Management Program:
http://researchguides.library.yorku.ca/content.php?pid=308804

Mendeley Video Tutorials:
http://community.mendeley.com/guides/videos

Mendeley Guides:
http://community.mendeley.com/guides

Mendeley Tips and Tricks Category:
http://blog.mendeley.com/category/tipstricks/

Creating a document in LaTeX:
https://www.sharelatex.com/learn/Creating_a_document_in_LaTeX

Summary of Reference Styles:
http://www.lib.vt.edu/find/citation/

Resources to help reference and develop academic skills:
http://www.library.auckland.ac.nz/study-skills

Switching from Word to Latex http://peterconradie.eu/updates/switching-from-latex-to-word/

How can I cite website articles in LaTex linked with Mendeley?
https://www.researchgate.net/post/How_can_I_cite_website_articles_in_LaTex_linked_with_Mendeley

10. Conclusion

With these few step-by-step procedures, scientists, engineers, researchers and students will be able to prepare their first publication with Mendeley references included. Trusting it will help to simplify the incorporation for references from Mendeley and other platforms into .tex files on the LaTeX format for Research Proposals, Theses, Dissertations, Journal Articles, Conference Papers, or Technical Newsletters.

11. Acknowledgements

Mendeley and LaTeX are registered trademarks of the developers of these software platforms and are recognized as such in this report.

References

[1] Ricardo, How to Use Mendeley to create citations using LaTeX and BibTeX. (2011).
URL http://blog.mendeley.com/tipstricks/howto-use-mendeley-to-create-citations-using-latex-and-bibtex/

[2] Scheikunde Jongens, Artikelbeheersystemen: Mendeley en Papers (2015).
URL http://scheikundejongens.nl/2010/10/artikelbeheersystemen-mendeley-en-papers/

[3] LaTeX Stack Exchange, How to cite in LaTeX using Mendeley? (2016).
URL http://tex.stackexchange.com/questions/180059/how-to-cite-in-latex-using-mendeley

Summary: Scientists, Engineers and Researchers are often faced with technical difficulties to cite bibliography references from free open-source reference management software in LaTeX and .TeX files. We share experiences on how to use Mendeley to create citations using LaTeX and BibTeX. This will help researchers integrate BibTex references from Mendeley, Zotero, RefWorks, EndNote, Qiqqa and other software reference platforms into .tex files on the Latex format or plugin. This procedure in helpful in new Research Proposals, Thesis documents, Doctoral Dissertation, or when writing journal articles, conference papers, research portfolio or technical newsletters. Mendeley and other reference managers can import reference libraries such as BibTeX (.bib) files, Endnote XML, Research Information Systems RIS (.ris) and Zotero Library (zotero.sqlite) file formats. This report describes the process in simple terms and was developed out of a need to describe to numerous students how to accomplish this relatively simple task. It describes the practical side on how to cite references in LaTeX using Mendeley and other citation reference managers and will help to simplify Bibliography creation with such software in citation analysis. It also shows the commands passed to the LaTeX compiler that determines the format of Bibliography references, such as for example Harvard Method, or Harvard Referencing Style, Parenthetical referencing, author-date method, author-title style, MLA style, Numbered-APA-style, scientific square brackets method, Vancouver referencing style, etc. These days reference managers also operate on Android apps, Notepads, iPads and iPhone app platforms makings these platforms even more attractive.

Tags: CTAN tex-archive mendeley latex integration mendeley export bibtex mendeley bibtex url mendeley bibtex sync mendeley generate bibtex bibtex month bibtex issue bibtex latex references instead of bibliography latex references example latex references in table of contents bibliography references latex multiple citations latex cite latex bibliography example latex bibliography style latex bibliography style examples latex bibliography url latex bibliography title latex bibliography not working latex bibliography order latex bibliography not showing latex cite multiple sources latex bibliography style options how published field academia latex cite package latex cite example latex cite multiple latex cite website latex cite page latex cite chapter latex cite vs citep latex cite all altmetrics API binary battle BibDesk BibBase Biblioscape BibSonomy Bookends Citavi CiteULike colwiz bug fixes citations collaboration Community Liaison Conference Crowdfunding csl data Developers Elsevier events Google groups How-to Impact factor Indiegogo Interview London Mendeley Mendeley Desktop New features New release open access Open API Alternative metrics open office open science PLoS publishing Reference management software research research catalog Science Science Online London search Technology Internet tips Twitter use case user feedback web importer webinar Open source BibDesk Docear Ilibrarian JabRef KBibTeX Pybliographer Referencer Wikindx Zotero Retail Biblioscape Bookends Citavi EndNote Mendeley Papers Qiqqa Reference Manager Sente Web-based BibSonomy CiteULike Connotea Ilibrarian Mendeley Qiqqa RefWorks Wikindx WizFolio Zotero COinS Bibliographic Project Mendeley reference manager academic social exporting BibTex for Latex Mendeley integration import your Mendeley reference library citations bibliographies Mendeley Basics Research Mendeley Tips Mendeley Campus Guide University Mendeley Citation Management Software Library Guide University Mendeley for LaTeX Mobile Cloud Mendeley citation reference bibliography LaTeX workshop Exporting Document Citations export individual document citations or article lists to citation export formats Mendeley, RIS, BibTeX, plain text BibTeX Export to LaTeX environment Bibshare in Word format of Latex manage references Academic CV LaTeX using Mendeley Tutorial References Management Mendeley Choosing a Citation Manager generate citations for LaTex format Citation tools Citing Made Simple WriteLaTeX cite in LaTeX using Mendeley Link to Streamline EndNote or Mendeley integration for LaTeX with LyX How to Generate BibTeX files Mendeley Mendeley with LaTeX and BibTeX Latex with Mendeley Bibliography Latex Tutorial TeX StackExchange LaTeX Bibliography Creation with Mendeley BibTeX, biblatex Literature study Import from Mendeley to NVivo Develop plugin support Office Mac 2016 preview Mendeley Customer Feedback Multiplatform high-quality typesetting system tool file format Enable BibTeX syncing Create one BibTeX file per collection Autogenerate .bib file Bioinformatics folder Citing in LaTeX create PDF Generate PDF academic features academic life connecting research disciplines Contests design research tools developer resources hard research life highlighting research Librarians Mendeley Data mendeley use case mobile new release open access research tutorials