MENDELEY

MIGRATION GUIDE

## RefWorks, EndNote X7, Zotero, Papers

How to migrate from RefWorks to Mendeley

When migrating from RefWorks to Mendeley, the steps involved differ, depending on whether you wish to retain your RefWorks folder structure in Mendeley (see p3) or if you would prefer to migrate all your references in one go.

To migrate all your RefWorks references to Mendeley in one go:

1. Log in to your RefWorks account.
2. Ensure you have 'All References' displayed in the 'References' location (see top image).
3. From the top menu, select References > Export
4. In the pop-up menu that appears, ensure that 'All in List' is selected and that the Export Format is set to 'Bibliographic Software (EndNote, Reference Manager, ProCite)'.
5. When ready, click the 'Export References' button which appears in the bottom right of the pop-up.
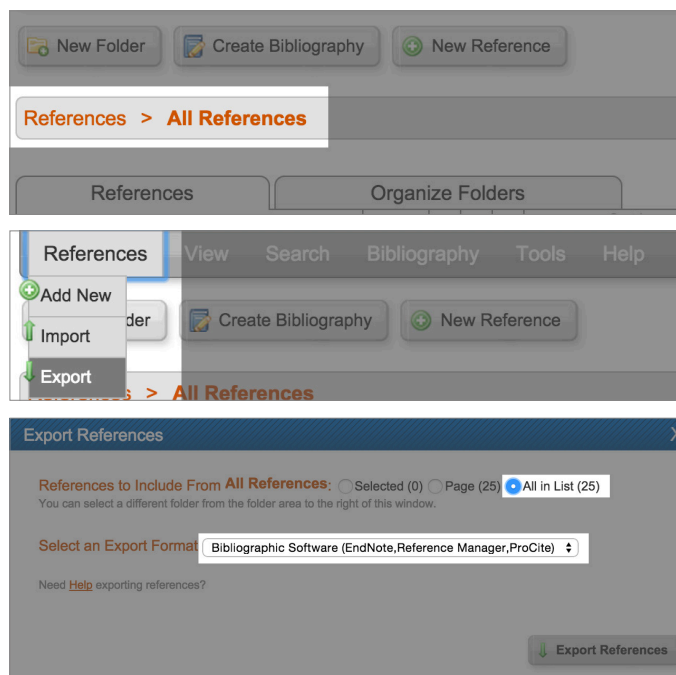
6. When the export is complete you will see a pop-up in the bottom right of your screen. You may receive a download prompt or you can use this pop-up to save a copy of the file to your computer.
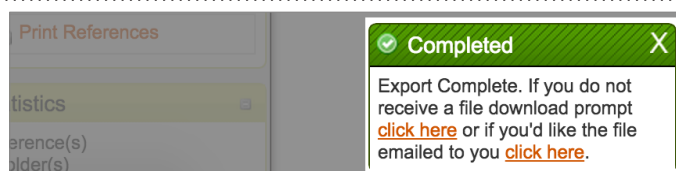
RefWorks provides reference exports as .txt files. You may find that if you click to save the file it instead opens in your browser, showing the plain text of your reference export file. If this happens, you can just use the 'File' menu of your browser to save a copy of the page as a .txt file to your computer.
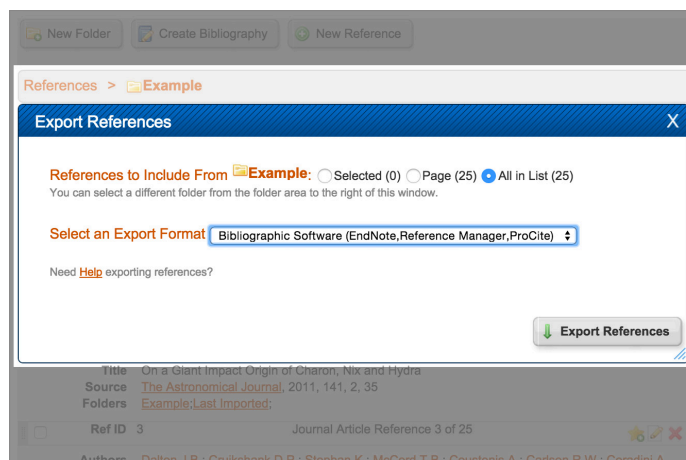
7. You now need to open Mendeley Desktop. Make sure you have 'All Documents' selected in the left-hand panel.
8. From the Mendeley Desktop 'File' menu, choose 'Add Files'.
9. Locate the file you exported from RefWorks and press the 'Open' button.
10. Your references will now appear in your Mendeley Library.

We recommend that you check through your references to ensure no details have been lost during the export process. You can use Mendeley Desktop to correct any errors.
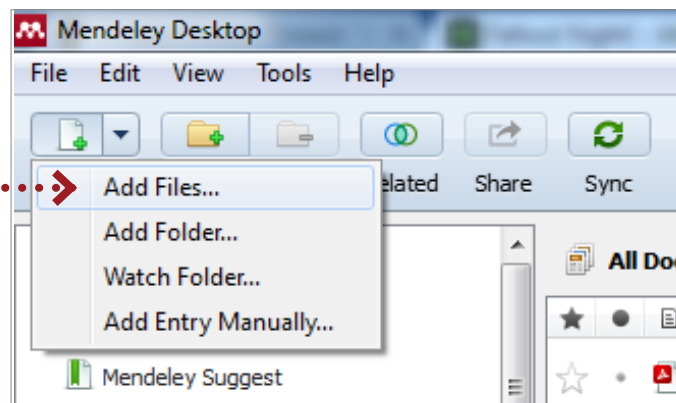
To maintain your RefWorks folder structure when migrating to Mendeley:

1. Log in to your RefWorks account.
2. Open the first folder you wish to migrate.
3. In the top left, select References > Export
4. In the pop-up menu that appears, ensure that 'All in List' is selected and that the Export Format is set to 'Bibliographic Software (EndNote, Reference Manager, ProCite)'.
5. When ready, click the 'Export References' button that appears in the bottom right of the pop-up and save the file to your computer.

You will be saving an export file for every RefWorks folder you intend to migrate, and therefore to avoid confusion we would advise you to pick easily recognizable file names for each export file.

6. You now need to open Mendeley Desktop.
7. In the left-hand panel you will see the option to create a new folder. Click this and give your folder a suitable name for the material you exported in step 1.
8. Once your new folder is created, make sure it's selected in the left-hand panel (the main panel should be blank, as the folder will be empty).
9. Now open the 'File' menu in Mendeley Desktop and select 'Add Files'.
10. Locate the appropriate RefWorks export file for the newly created folder and press the 'Open' button.
11. Your references will now be added to your Mendeley Library and will also appear within the folder you created in step 7.
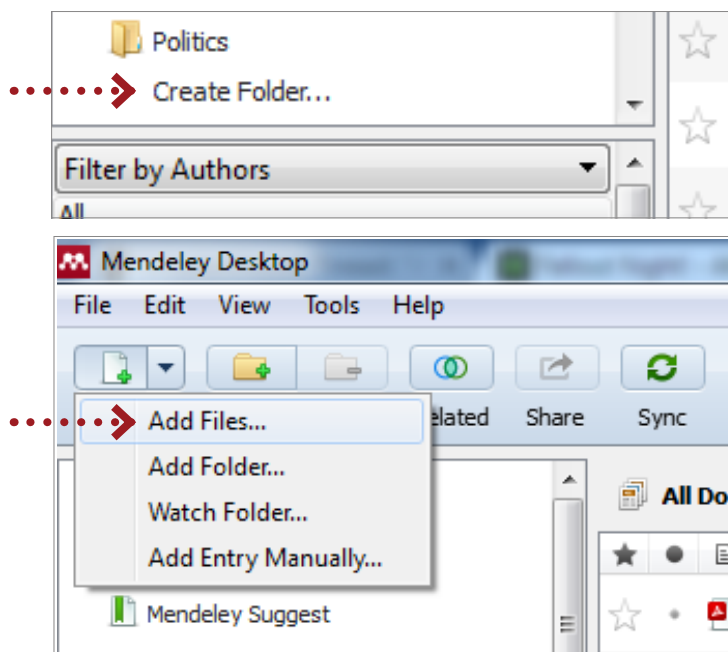
You will need to repeat steps 1 to 11 for each RefWorks folder you intend to migrate.

Note: Attachments in RefWorks will not be exported. You will need to save these individually to your computer and then import them into Mendeley.

To import PDFs into Mendeley:

a. From Mendeley Desktop, click 'Add files' - either found via the 'File' menu or by using the 'Add' button on the main toolbar.

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

c. Click 'Open'.

d. Mendeley will pair your imported PDFs with the corresponding reference already in your library.

**Note:** Data in the RefWorks User Fields sections will not be imported to Mendeley. Copy that data into the 'Comments' area before exporting or importing.

Once you've finished migrating, make sure you press the 'Sync' button in Mendeley Desktop to save your changes in the cloud.
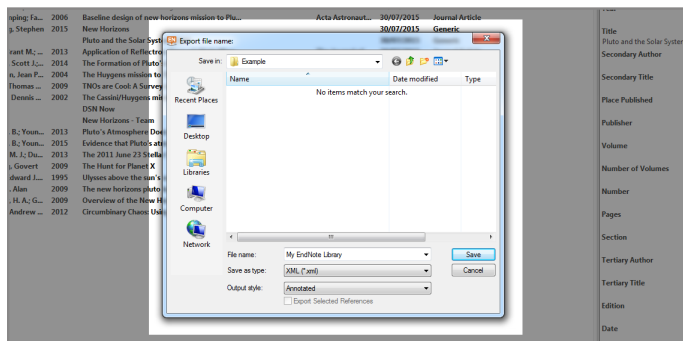
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How to migrate from EndNote X7 to Mendeley

To import your whole 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
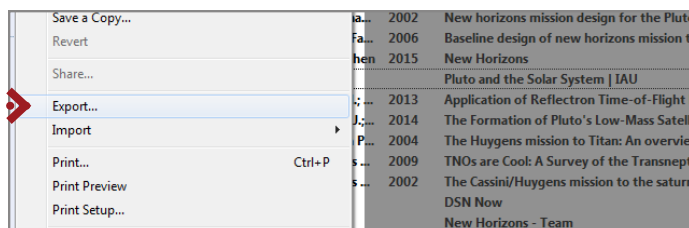
2. In the dialog menu that opens, ensure 'Export Selected References' is unticked, as you want to export all the items in your EndNote library.

3. Ensure that 'Save file as type' is set to 'XML'. See the next page for other export file types.

4. Provide a suitable file name and save the export file to your computer.

5. Now open Mendeley Desktop. As you'll be adding the EndNote files to your main library, make sure 'All Documents' is selected in the left-hand panel.

6. Open the 'File' menu and choose 'Add Files'.

7. Locate the EndNote export file you saved in step 4 and press the 'Open' button.

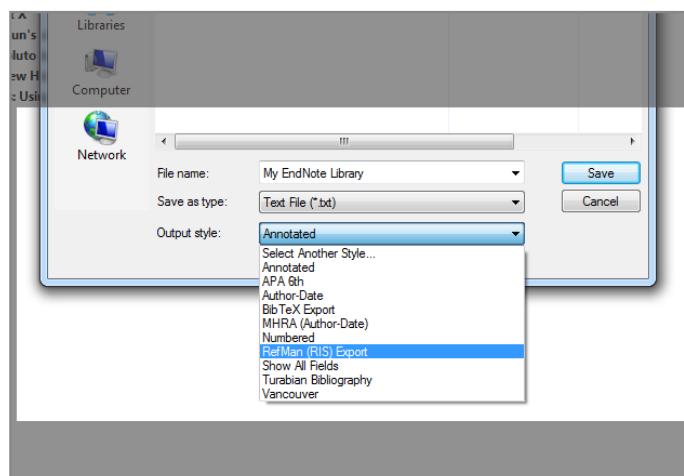8. Your EndNote references will now be added to your Mendeley library.
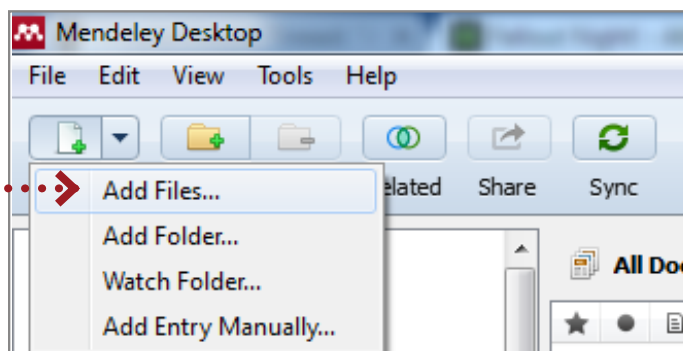
Once you've finished migrating, make sure you press the 'Sync' button in Mendeley Desktop to save your changes in the cloud.

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. In EndNote open the 'Edit' menu.

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

3. In the list that appears, tick 'Bibtex Export' and 'RefMan (RIS) Export'.
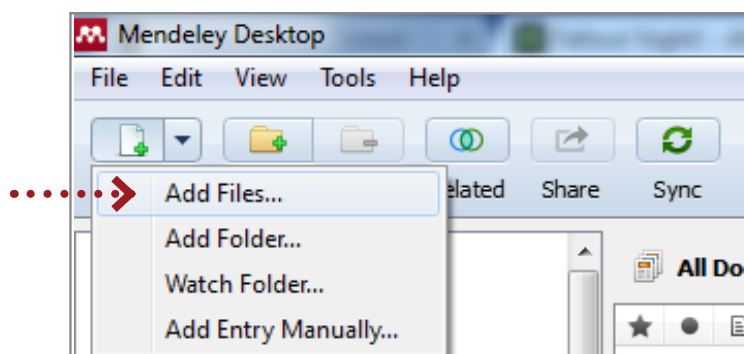
4. Close the EndNote Style Manager.
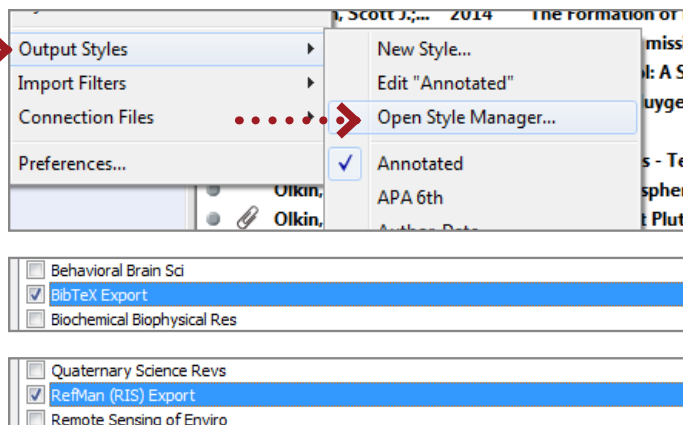
5. Now, use File > Export to open the export dialog.

6. With the export dialog open, use the 'Output Style' menu to select either 'Refman (RIS) Export' or 'BibTeX Export'.

7. Ensure 'Save as type' is set to 'Text File'.

8. Remember to untick 'Export Selected References' to export your entire library.

9. Provide a file name and save the export file to an appropriate location on your computer.

Note that while the files that EndNote outputs will be formatted according to RIS or BibTeX rules, the actual file you receive will usually be a .txt file. This isn't a problem: Mendeley will still handle the import for you.

10. Open Mendeley Desktop. Ensure 'All Documents' is selected in the left-hand panel.

11. Open the 'File' menu and choose the 'Add Files' option.

12. Locate the EndNote export file you saved in step 9 and press the 'Open' button.

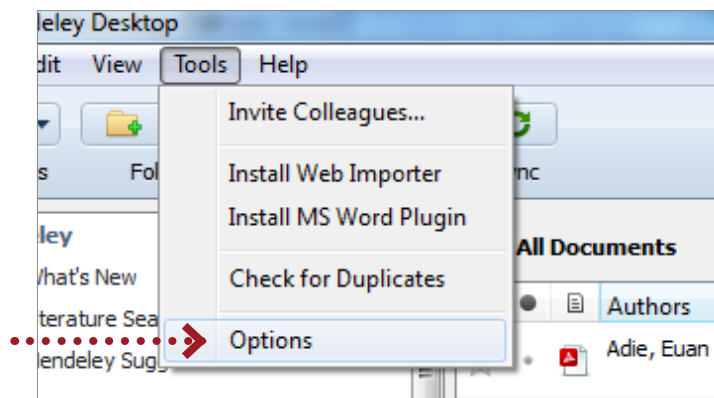**13.** Your EndNote references will now be added to your Mendeley library.

Once you've finished migrating, make sure you press the 'Sync' button in Mendeley Desktop to save your changes in the cloud.

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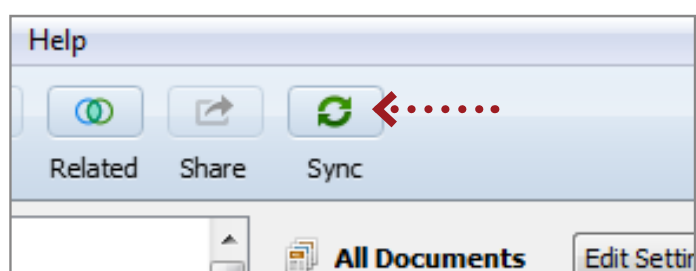
How to migrate from Zotero to Mendeley

Mendeley Desktop allows you to import your documents directly from Zotero. To do this, you'll need to install Mendeley Desktop on the same computer on which you have Zotero installed.
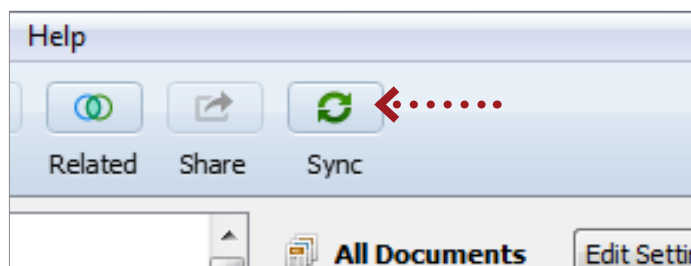
1. Open Mendeley Desktop.
2. Go to 'Tools' and select 'Options'. If you are using a Mac, go to the 'Mendeley Desktop' menu and select 'Preferences'.

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 specify a particular Zotero database.
6. Click 'Apply' and then 'Ok'.
7. Once you've clicked 'Apply', all 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.
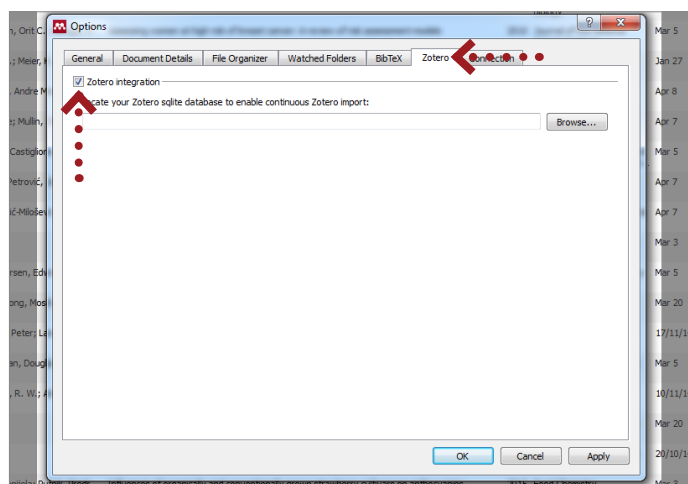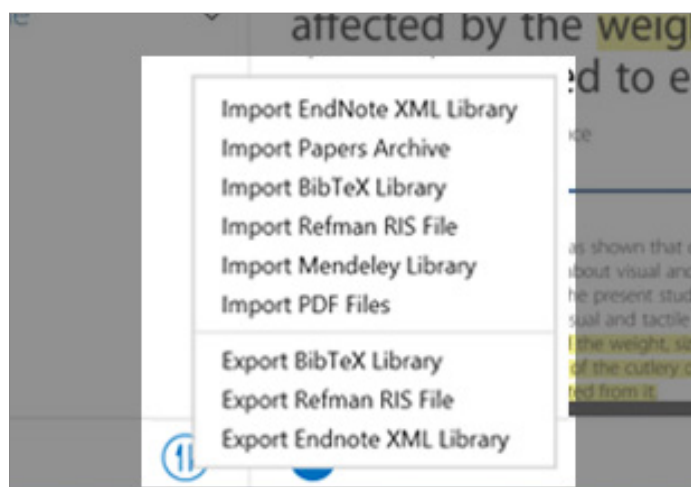
Once you've finished integrating, make sure you press the 'Sync' button in Mendeley Desktop to save your changes in the cloud.

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, either select File > Export or use the 'Import/Export' button. Select 'Export 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. Open the 'File' menu and choose the 'Add Files' option.
7. Select the file you exported from Papers.
8. Click 'Open'.
9. Your papers will now be imported into Mendeley under 'My Library'.
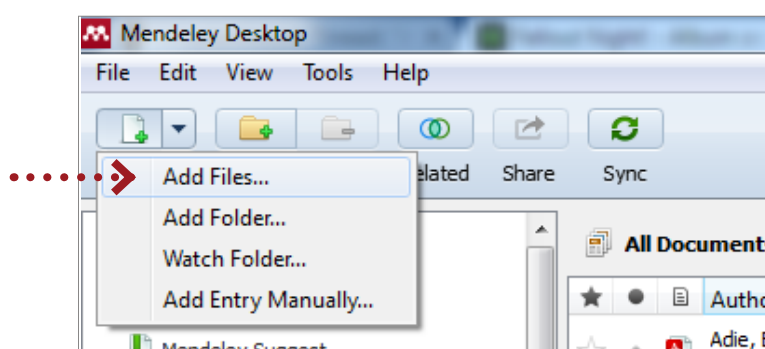
Once you've finished importing, make sure you press the 'Sync' button in Mendeley Desktop to save your changes in the cloud.
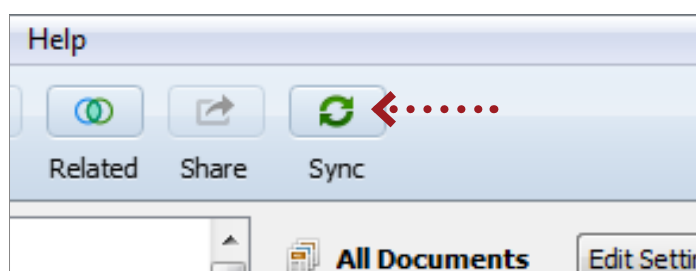
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