

Guide

Mendeley

Migration Guide: RefWorks & ProQuest RefWorks



EXECUTIVE SUMMARY

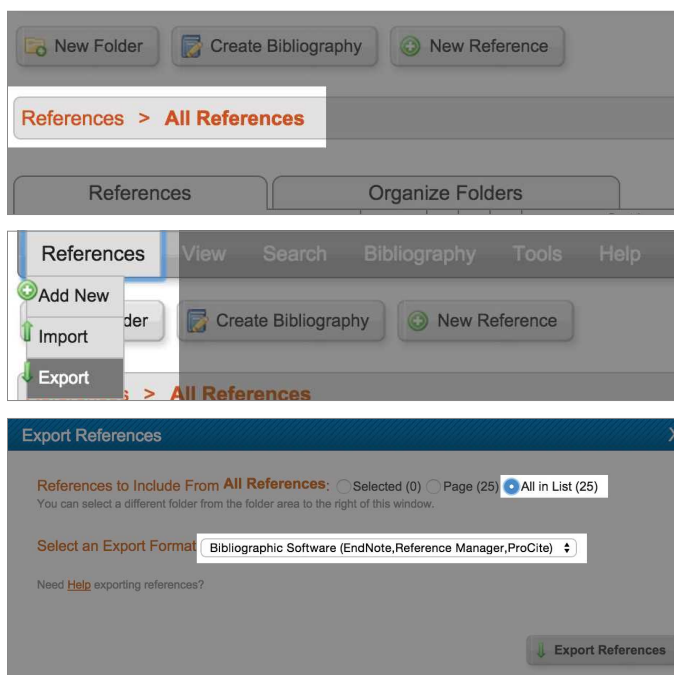
This guide shows how to migrate libraries from multiple reference managers to Mendeley.

How to migrate from RefWorks to Mendeley

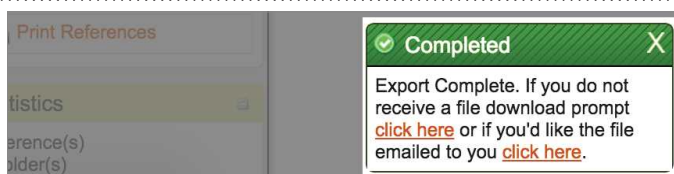
When migrating from RefWorks to Mendeley, the steps involved differ, depending on whether you wish to retain your RefWorks folder structure in Mendeley (see p3) or if you would prefer to migrate all your references in one go.

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.



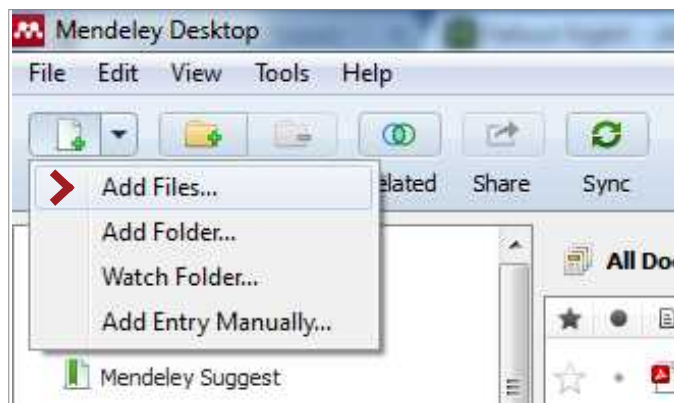
6. When the export is complete you will see a pop-up in the bottom right of your screen. You may receive a download prompt or you can use this pop-up to save a copy of the file to your computer.



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.

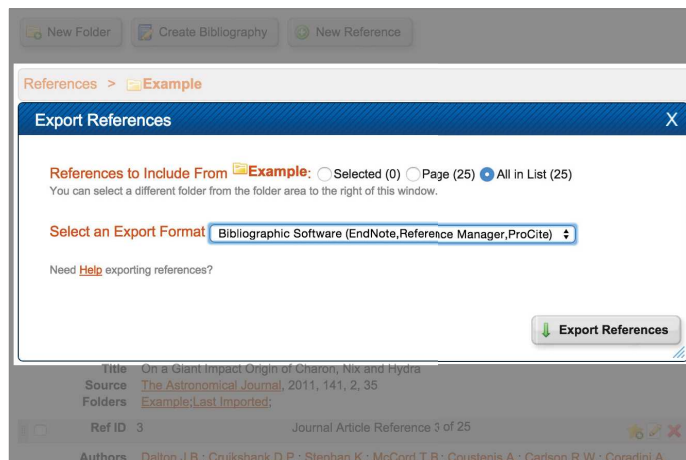
7. You now need to open Mendeley Desktop. Make sure you have 'All Documents' selected in the left-hand panel.
8. From the Mendeley Desktop 'File' menu, choose 'Add Files'.
9. Locate the file you exported from RefWorks and press the 'Open' button.
10. Your references will now appear in your Mendeley Library.

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.



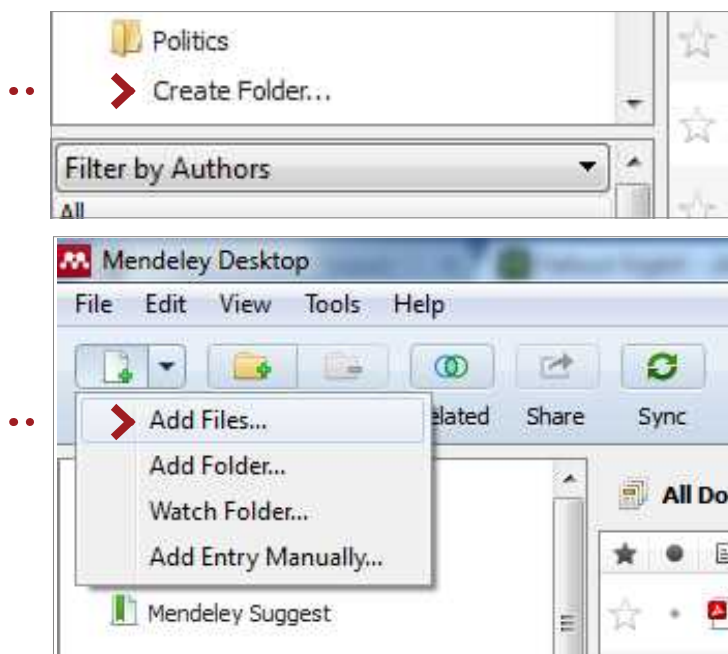
To maintain your RefWorks folder structure when migrating to Mendeley:

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.

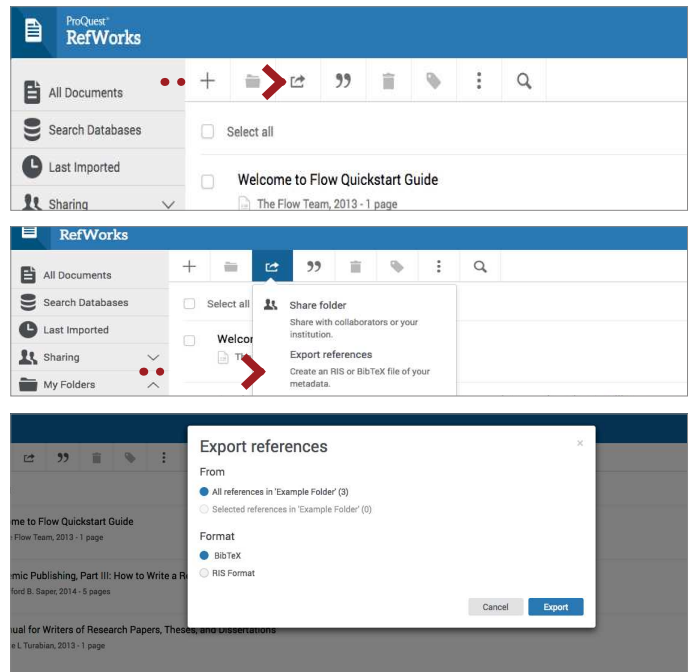
Once you've finished migrating, make sure you press the **'Sync'** button in Mendeley Desktop to save your changes in the cloud.

How to migrate from ProQuest RefWorks to Mendeley

ProQuest RefWorks only allows you to export one folder at a time. Equally, since Mendeley folder structure is different is not possible to export multiple folders either.

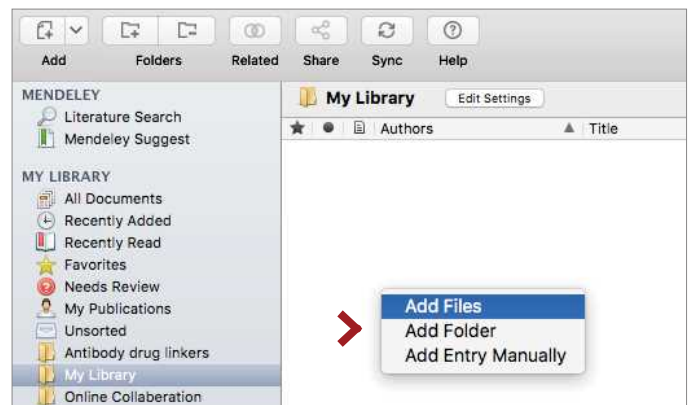
To migrate all your ProQuest RefWorks references into Mendeley:

1. Log in to your Pro Quest RefWorks account.
2. Click on the folder you want to migrate. Ensure you **you select all references you want to migrate**.
3. From the top menu, click on the export button and select **Export references**
4. In the pop-up menu that appears, ensure that 'Selected references' is selected ('All references in <Folder Name>' would export all) and that the Export Format is set to **BibTeX**.
5. When ready, click the 'Export' button which appears in the bottom right of the pop-up.
6. Save the BibTeX file in your computer



7. You now need to open Mendeley Desktop.
8. Select the folder where you want to add the references to.
9. Right click on the center pane of Mendeley Desktop and select **Add file**.
10. Locate the .bib file you exported from ProQuest RefWorks and **click open**.
11. Your references will now appear in your Mendeley folder

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.



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 Web Library, click Add + > Import document -
- 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.