

IVS-BM

Mendeley

Information for users and librarians

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I Introduction

Mendeley is a Reference Management System which can be downloaded for free from www.mendeley.com. The company Mendeley Ltd. is based in London and was recently acquired by the publishing company Elsevier.

The software is composed of a desktop installation and a web interface which requires registration. There is a constant synchronization of references and attachments in both directions between the applications. This allows you to access your reference collection anywhere and anytime.

I.I Mendeley Desktop

In the desktop version of Mendeley, you can import and organize references. The collected metadata can be imported out of databases or automatically extracted from imported PDFs. These documents and their references can be organized with folders, tags, or keywords. A plugin for MS Word enables to insert citations and bibliographies in your publication.

I.II Mendeley Web

Mendeley's web version allows accessing the library from anywhere using a web browser. Not all import options are available online. But on the web, references can be shared with other users in so-called public and private groups. Private groups even allow sharing attachments.

After the user has exceeded the free online storage space, additional personal storage space can be purchased. Also, the number of people in private groups and their shared storage space can be enlarged through the purchase of "Team Plans". For more information about pricing, see: <https://www.mendeley.com/upgrade/team/>.

Additionally, on Mendeley's website, there is a "Research Catalog" available. The contents of this catalog can be sorted by discipline, popular and latest papers and the journal in which the papers were published. On Mendeley's website, you can also set up your own public profile as in a social network and make your CV and papers available to the public.

II Usage Concerns

There are certain issues which we feel Mendeley users should be aware of. Our concerns are related to copyright and the processing of personal user information.

II.I Profile

When Mendeley is set up for the first time, personal and professional information, e.g. your field of study and academic status, is required to register on the platform. It is not possible to leave fields empty and at first sight, you will get the impression that without completing this form, a download of Mendeley is not possible (see Fig. 3). The data entered will be part of your online public profile (see Fig. 2) (1).

Additionally, all PDFs which you have added to the "My Publications" section in Mendeley Desktop will automatically be publicly available for download on your public profile. Recently, a small warning has been added to the "My Publications" section (see Fig. 1).

Note: PDFs will be publicly available for download from your profile.

Fig. 1: “My Publications” warning

This profile page on Mendeley can be used to self-archive your own publications and to make them available to the public as a free download by clicking on “Download PDF”. Additionally, there is a corresponding link to the publisher’s website. Papers from Elsevier are not made available to the public for a direct download from the user’s public profile page (2). You can see in the public profile below (Fig. 2) that only the full-text from a non-Elsevier journal is directly available as PDF.

The image shows two overlapping windows. On the left is the Mendeley web profile for Ben Bowman. Under the 'Publications' section, there are four journal articles listed. The last article, 'Standards für die Anwendung der Bibliometrie bei der Evaluation von Forschungsinstituten im Bereich der Naturwissenschaften, 233-260. In Zeitschrift für Evaluation 11 (2).', has a red box around the 'Download PDF (266.06 KB)' link. On the right is the Mendeley Desktop application window. The 'My Publications' tab is active, showing a list of documents. The same article is listed in the desktop application, also with a red box around it. The desktop application shows a 'Quick send' button at the bottom.

Fig. 2: Full-text PDFs from Elsevier Journals added to the “My Publications” section will not be available via a direct “Download PDF” button from your public profile page

In case only a reference and no PDF was added, just the link you have provided will be displayed.

To define privacy settings for your profile, e.g. the visibility of personal information for search engines, you have to choose: “My Account” and “Privacy”. You can also set your profile to be excluded from the public.

The screenshot shows the first step of the Mendeley registration process, titled 'Create a free account'. A progress bar at the top indicates three steps: 1 (current), 2 'Tell us your interests', and 3 'Start using Mendeley'. The registration form includes a password field with a warning icon and the text 'Password must be at least 5 characters.', a dropdown menu for 'What's your field of study?' with a warning icon and the text 'Please select your field of study.', and another dropdown menu for 'What's your academic status?' with a warning icon and the text 'Please select your academic status.'. To the right of the form, there are two green checkmarks with the text 'Millions of papers are added every week' and 'Thousands of people sign up daily'. Below the form is a green 'Download Mendeley' button and a line of text: 'By downloading Mendeley I agree to the [terms of use](#).' At the bottom right, there is a link to '...or create an account with' followed by a Facebook logo and the text 'Facebook'.

Fig. 3: Required account information during registration

II.II Copyright

After the registration and installation of Mendeley, all references and attached files will be automatically synchronized with the web. Already during installation you will have to accept the Terms of Use (3). Point six says:

6. ACCEPTABLE USE TOP

6.1. You may use our Site and our Software only for lawful purposes. You may not use our Site or our Software:

6.1.1. to send, knowingly receive, upload, download, use or re-use any academic papers or articles without the permission of the copyright owner. However, you may perform these actions if you are the copyright owner, have the copyright owner's permission, are permitted to do so under license from an Open Access database or a Creative Commons license, or are permitted to do so by copyright fair dealing or fair use exceptions in any relevant jurisdiction. You can read more about Creative Commons licenses here: www.creativecommons.org.

Fig. 4: Mendeley's Terms of Use

These Terms of Use (within the meaning of Article 3 of Directive 2001/29/EC) prohibit the upload and making available to the public of any academic papers, unless you are the copyright owner or you can claim a statutory exception or an Open Access license for your activities (4). Most users will probably upload PDFs which they have access to through licenses purchased by their institutes – as this is the most common usage scenario for Reference Management Systems. This access right does not give you the permission to make these documents available to the public. If you do so with Mendeley, any possible copyright claims by publishers will not concern Mendeley, but you as the end-user of the software. This might lead to a letter of caution by specialized lawyers, or court and lawyer fees, compensations, fines, or even imprisonment (4).

II.III Private Groups

Mendeley's unique feature compared to other reference management systems is the exchange and especially the annotation of full-text articles in so-called private groups. Groups can be created either in Mendeley Desktop or on the web and will be visible (including their content and members) in both applications. Annotations and notes can only be displayed and edited in Mendeley Desktop (see Fig. 5).

Mendeley allows setting up one private group with up to three members without costs. These members must receive an invitation from the group owner to join the private group. In the private group, members are allowed to exchange papers to which they otherwise might not have access, as e.g. their institutional library may not have bought a subscription for the specific journal.

Mendeley allows these collaboration steps with the following explanation: „think of adding PDFs to a private group as you printing off the files for personal use: it is covered under the 'Fair Use' part of copyright" (5). „Fair Use“ is a term of American Copyright Law that allows the reproduction of works for research purposes (6).

In German Copyright Law, Section 52a, Paragraph 1, Item 2 (UrhG) determines that published limited parts of a work, as well as articles from periodicals, may be exchanged within a limited circle of persons for their personal scientific research (4). This means that the limited number of people for private groups, offered in the free version of Mendeley, is in accordance with German legislation. Nevertheless, the purchase of "Team Plans" offers to collaborate with up to 50 people.

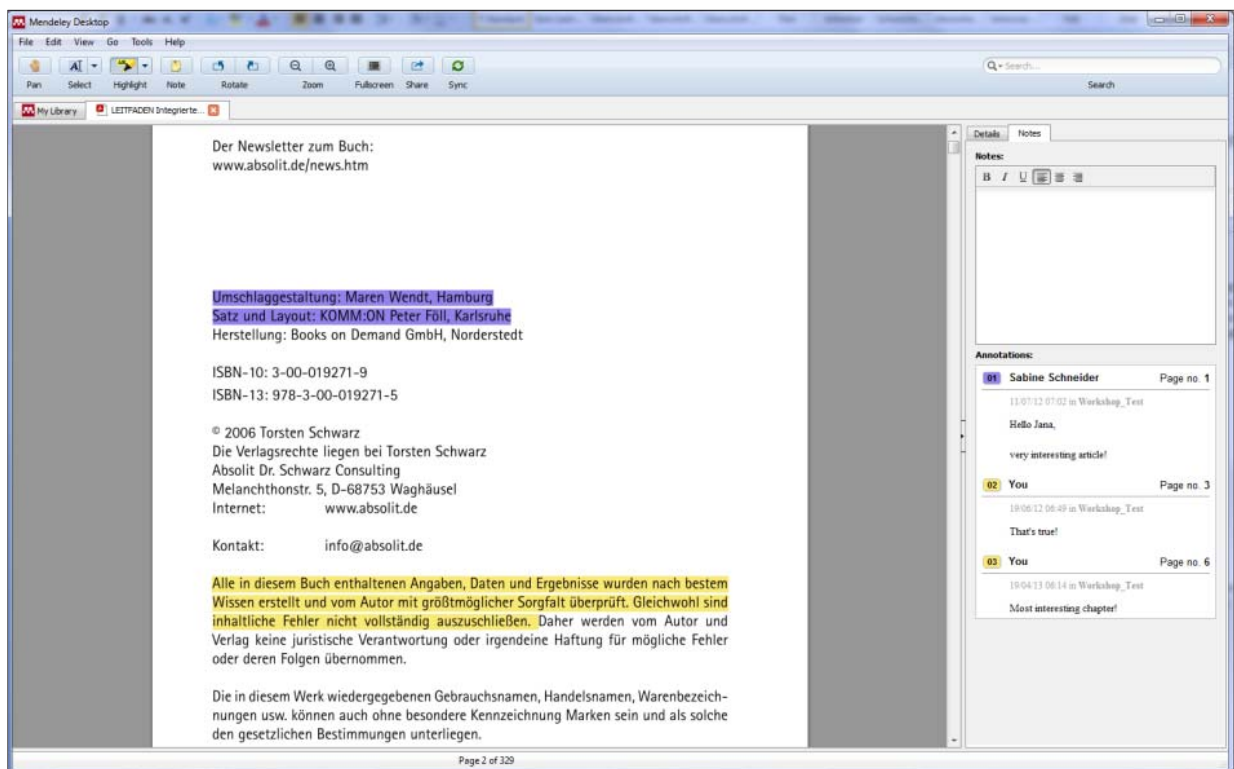


Fig. 5: Collaborative annotating of full-texts in a private group

II.IV Research Catalog

All references and attachments in a user's library are automatically synchronized with the web. As soon as your references are on Mendeley's servers, they will be publicly accessible via Mendeley's "Research Catalog" – even for non-users. Not only metadata, but also readership statistics and recommendations, will be displayed. This additional information was pulled in an anonymized manner from the users' behavior and the details added to their public profiles. In fact, Mendeley keeps track of who is connected to whom and who downloaded which papers.

In case the uploaded document (see II.II Copyright) was an Open Access article, the full-text is made available to the public and can be downloaded online. All other papers, which are not Open Access articles, will be listed in the "Research Catalog" as well, but the full-text will not be available for a download (7). There will only be a preview created from the first pages available.

The parameters according to which a reference is added to the "Research Catalog" or not, are unclear. From our own experience we can say that certain references are immediately recognized, based on references that have previously been added by other Mendeley users. Other references will not be listed even after a year. This may be due to incomplete metadata fields (2).

Not only the fact that information is unknowingly pulled from user's libraries to create the "Research Catalog", but also that the quality of metadata cannot be guaranteed, makes this catalog a very questionable information resource.

III Usage Advice

The following chapter will show steps you might take to benefit from Mendeley's features without harming others or your rights.

One additional alternative not mentioned below would be to delete your account and export your library to any other Reference Management System, e.g. Zotero.

III.I Download without Registration

At the bottom of Mendeley's homepage (8) you will find a green button that allows downloading Mendeley without having to register (see Fig. 6). This will obviously exclude the user from synchronization and any web applications, rendering Mendeley a desktop application (see I.I Mendeley Desktop).



Fig. 6: Download button without registration

III.II Exclude from Research Catalog

In case you still want to use Mendeley's web applications such as private groups or your own profile page, but nevertheless want to keep your library private, a box has to be ticked in the details tab for every single reference (7). This will mark the reference as "unpublished work" and will therefore exclude it from the "Mendeley Web catalog" (Fig. 7) which is actually Mendeley's "Research Catalog" (9).

In case there are already too many references in your library it might be best to write an email to copyright@mendeley.com to ask for immediate removal of all your references.

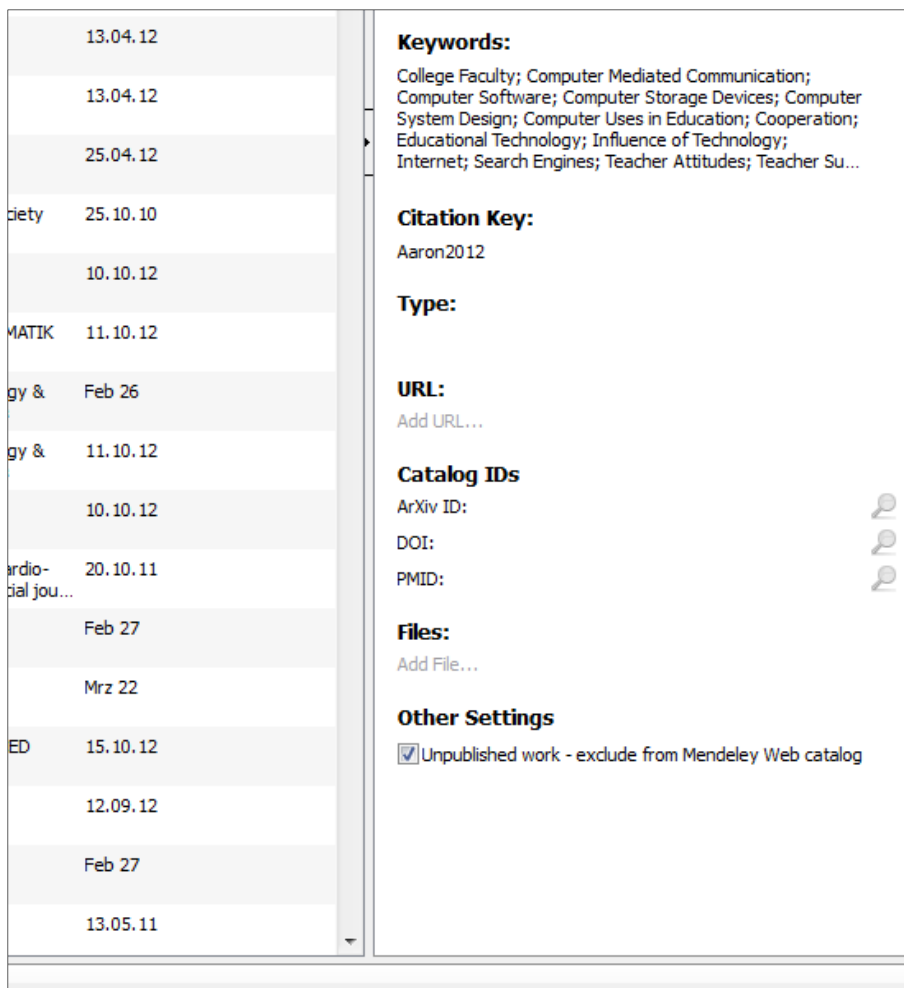


Fig. 7: Details tab to define any reference as unpublished work to exclude it from the "Research Catalog"

III.III Avoid Full-text Upload

As mentioned before in chapter II.II, you must claim during installation that you will not upload any material without being the copyright owner. As this happens automatically during synchronization, you can define that full-texts will not be uploaded.

Furthermore, this minimizes the amount of storage space used on Mendeley's servers, thereby avoiding having to purchase additional space.

In order to prohibit file synchronization, you have to go to the "All documents" section on the left hand side of your desktop installation and then choose "Edit settings" (Fig. 8). The box

“Synchronize attached files” has to be unchecked (Fig. 9). Thereafter, you will have to click the synchronization button again, removing all existing files from your online library. This may take some time.

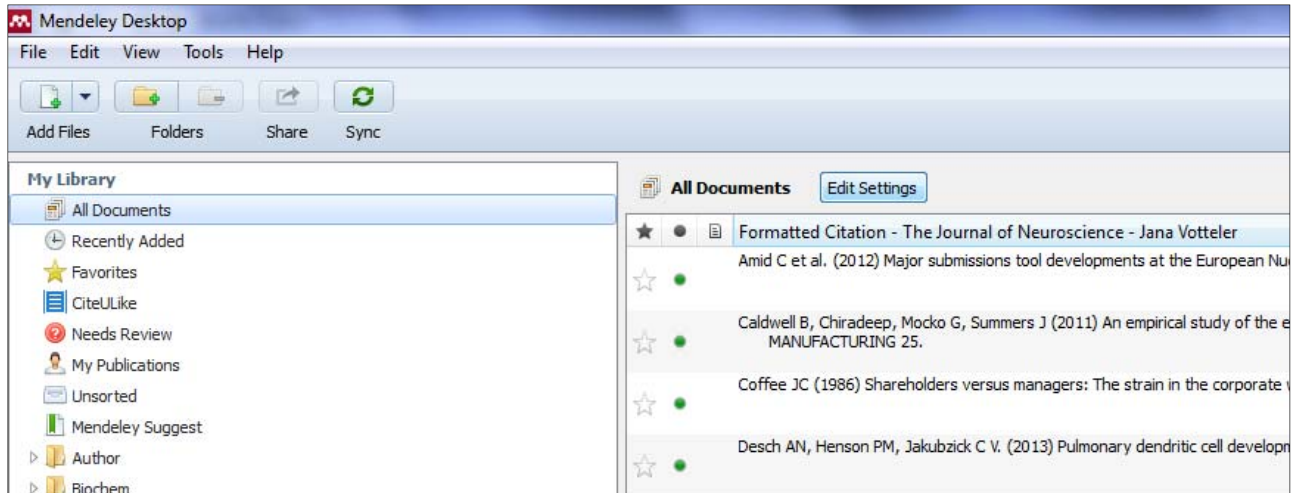


Fig. 8: Click on “Edit Settings” to enter file synchronization options

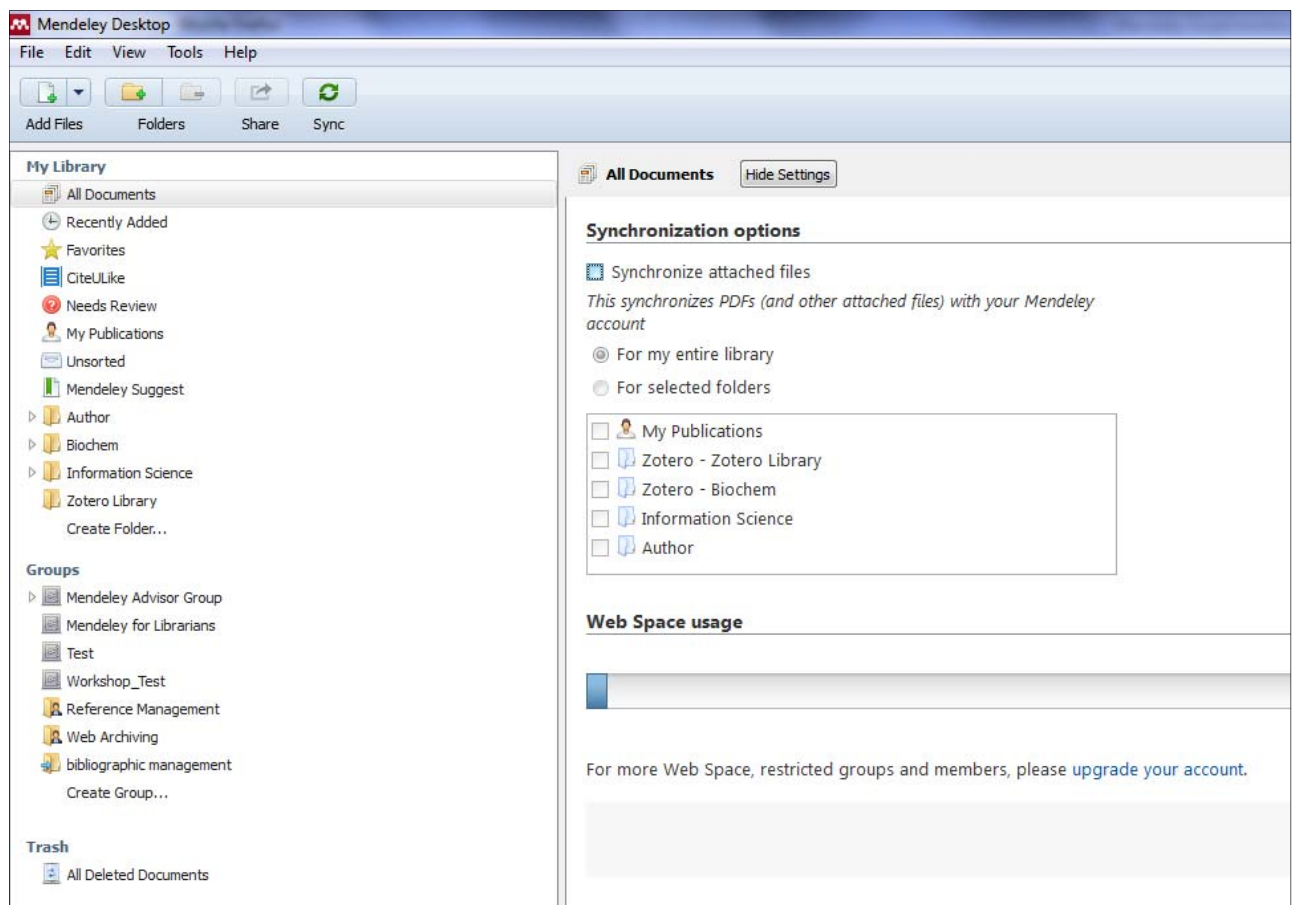


Fig. 9: Uncheck the box “Synchronize attached files”

IV Future Scenarios

In April 2013, Mendeley was acquired by the publisher Elsevier. The official announcement by Mendeley was “Mendeley joins Elsevier”. This step will unite powerful positions from two sides: Mendeley’s user data and social platform on one side and Elsevier’s content and economic power on the other (10).

In the past, Mendeley has been selling user generated data to publishers and other companies, now all owned by Elsevier (11). A possible scenario could now be that Elsevier wants to sell this data again – to the disadvantage of users and customers like libraries. But Mendeley has negated those concerns (12).

At the moment, the user benefits from the personal online storage for files having been increased from one to two GB. Not visible at first sight was that the shared online storage in groups having been decreased from 500 to 100 MB. This could be a future income area: the “Team Plans” that charge for private groups created in Mendeley.

In the future, there might be an integration of Elsevier’s database platforms and Mendeley’s reference management application. For example a button could be included in Scopus or ScienceDirect that allows the direct import in Mendeley without having to sign in twice (13).

It might also be possible, that Mendeley and its API will no longer be a free application. But compared to other social media platforms, this business model worked out very well and will only benefit from the huge amount of user data if the surrounding services remains free. This fits the statement of Elsevier: “It’s open, social and collaborative, and it is important to us that it retains all of those traits” (13).

V Recommendations

As pointed out in the last chapter, the situation of Mendeley after the acquisition by Elsevier has not yet changed much. We recommend users and librarians to follow the developments and to make their own decisions for their usage behavior. Mendeley’s Support Portal (<http://support.mendeley.com/>), Blog (<http://blog.mendeley.com/>) and Release Notes (<http://www.mendeley.com/release-notes/>) provide information about new features.

Everybody should be aware of applicable copyright law in their country of research if they use cloud applications, such as Mendeley, for sharing or accessing full-texts on the web. For more secure transfer of data, GWDG Cloud Share can be used for free by all members of the Max Planck Society: <https://powerfolder.gwdg.de/login>.

Especially younger scientists should be aware that a free service of a company is only possible if they are willing to provide personal and usage information. This applies particularly to the social network character of Mendeley.

What we recommend is to use Mendeley either only as a pure desktop installation without any web synchronization or to change to more secure systems, which also provide web synchronization features such as EndNote or Zotero. For more information, see: <http://www.biochem.mpg.de/en/facilities/ivs/BibMgmt/index.html>.

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