Mendeley Learning Series

Annotating PDF Files and Recording Notes

In this module you will…

use Mendeley's PDF annotation and notes tools.

Purpose

Mendeley contains a built-in PDF viewer. While reading PDF files, specific regions of interest can be highlighted. Annotated notes can be placed in specific locations within the PDF. Mendeley also provides a mechanism for recording general notes for a PDF or citation entries that have no linked documents.

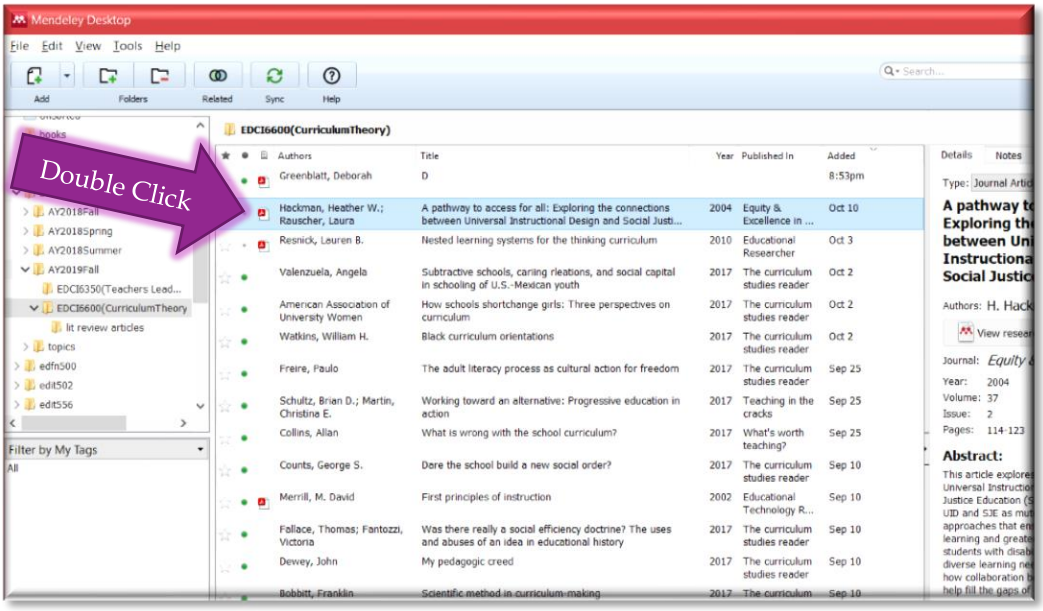
Pro-Tip

The general notes section for a Article/Citation is a great place to record a short summary of an article. Be sure to include the research method, general findings, and any limitations or details that may be specifically helpful to you.

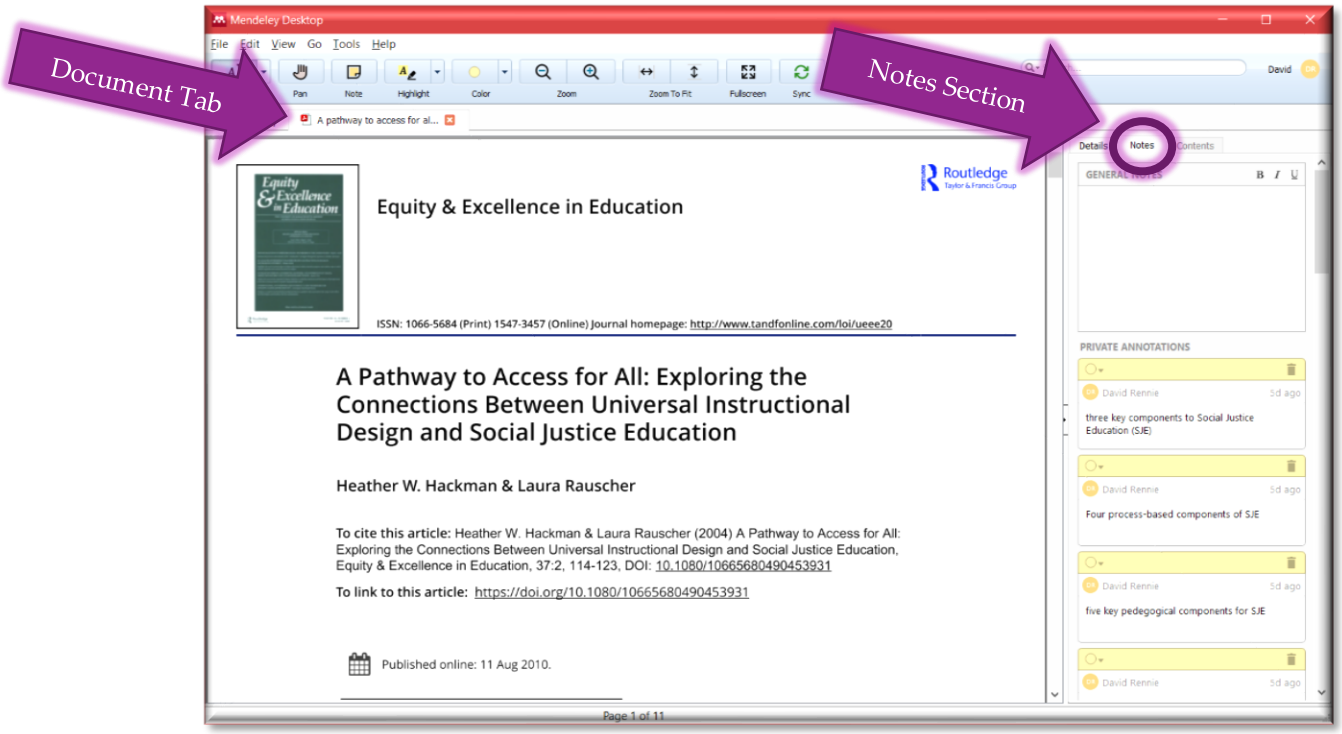
Step-by-Step

Step 1: Select The Article/Citation

Navigate to the entry in the Article/Citations Panel. Double click on the entry to open it. If there is a linked PDF file, Mendeley will open the PDF viewer.

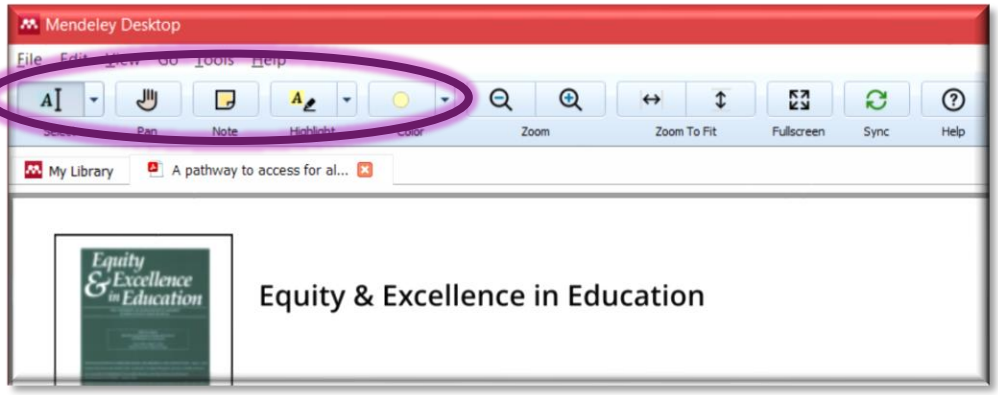


Mendeley will open a new tab displaying the PDF. Click on the Notes tab in the Document Details Panel.



Step 2: Selecting Highlighting Tools

The toolbar contains 5 buttons that are useful for selecting text and/or annotating PDF files.



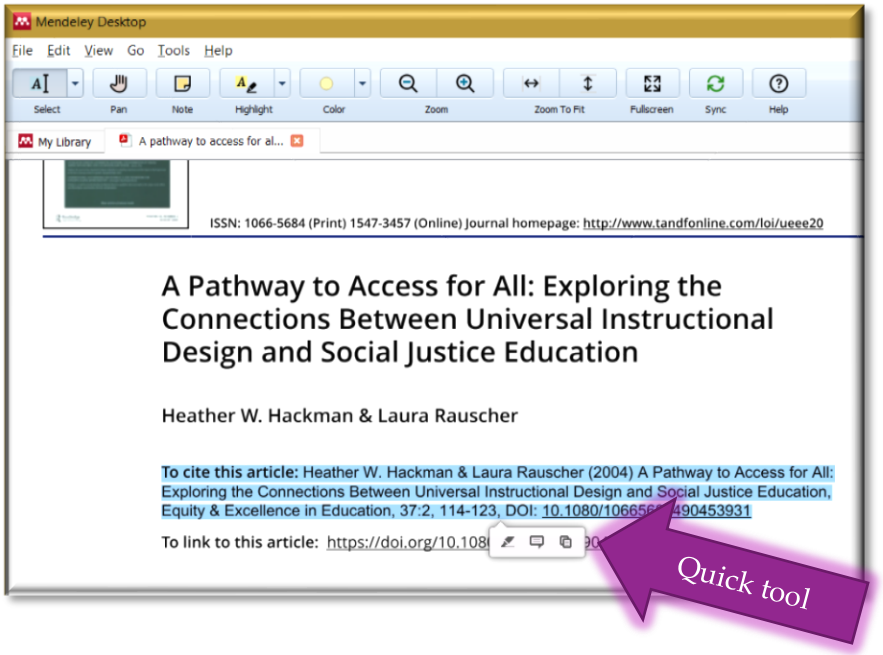
The first button is a Text Selection tool. Using the drop-down menu selection will reveal a Rectangle Selection tool option.

The second button is a Pan tool which allows the view area to be moved within the PDF reader.

The Note, Highlight, and Color buttons are the primary tools used for annotating documents.

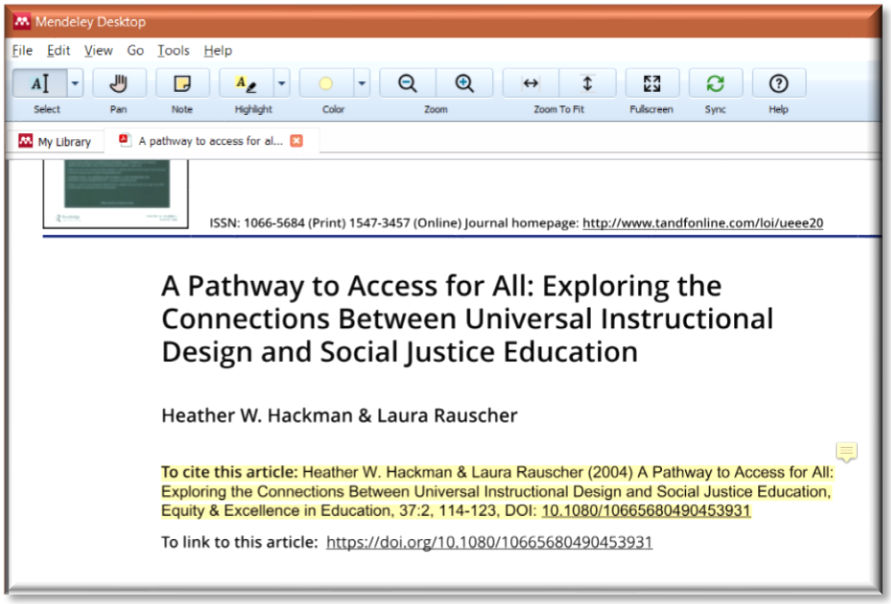
Step 3: Highlighting Text and Adding Notes

Using the selection tool, you can highlight text within the Mendeley PDF viewer.



Once the selection is made, a "quick tool" tab is available. The first tool button available is the "highlighter" tool that will use the color currently selected from the "Color" selection in the top toolbar.

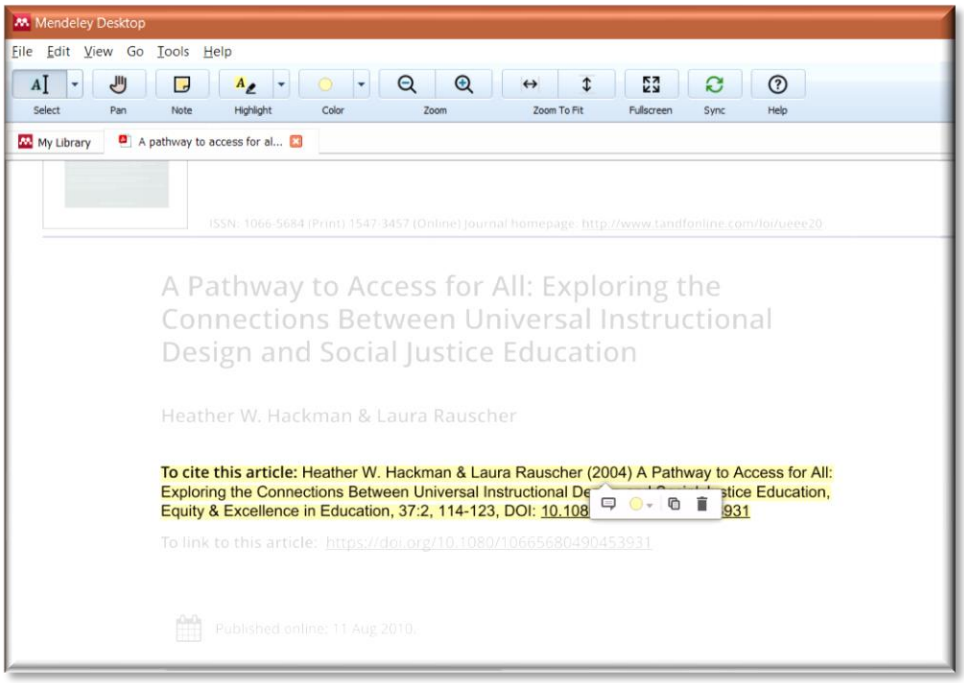
The second option is the "note" tool. This will highlight the selected passage and provide a quick-note window which is located in the margin of the current PDF view.



The third quick-tab option is the "copy to clipboard" tool. This will use your computer's operating system clipboard and copy the selected text into the clipboard.

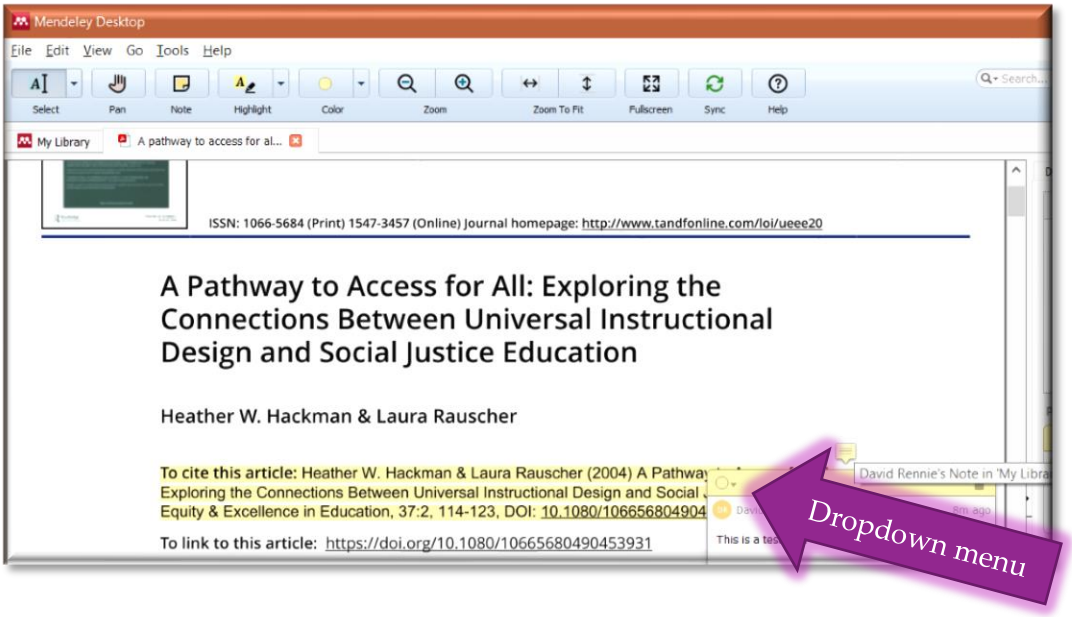
Step 4: Editing Highlights and Notes

If you would like to change the color of a highlighted section or copy it to the clip board, single-click on a highlighted selection. Notice this will "gray out" the section of the document note highlighted, and it will display the "quick-tool" tab.



The first tool available in this quick-tab tool is the note tool. The second tool will provide a way to change highlight colors. The third tool is the "copy to clipboard" tool. The last tool is the "remove highlight" tool.

To change the color of a annotated note, single click on the "note icon" in the PDF viewer to open it.



Using the dropdown arrow menu at the top of the note will bring-up a list of color options to change the note's color.

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