



# Getting Started Guide

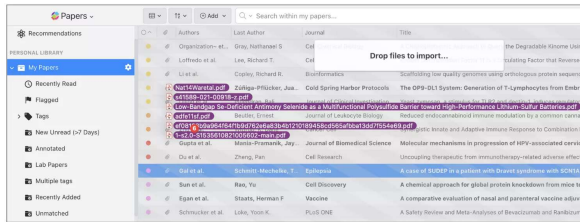


# Papers Functionality (Web/Desktop)

## IMPORTING EXISTING LIBRARIES

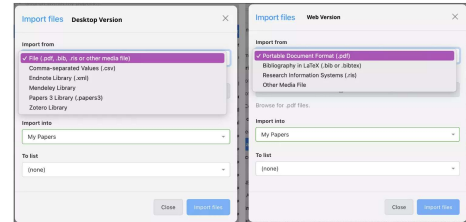
### Option 1: Drag & Drop

Simply select the PDFs you'd like to import from your desktop and drag them onto the library window.



### Option 2: Library Add Menu

Import a variety of file types such as PDFs, .RIS, or BIB. CSV files can also be imported with this menu in the desktop app.



### Option 3: Other Reference Managers

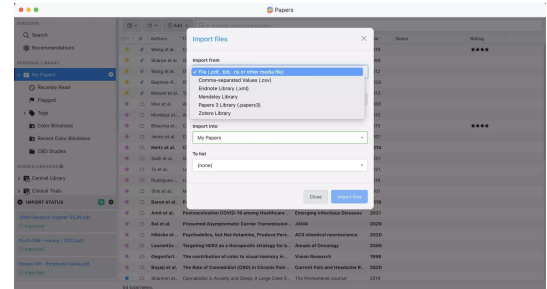
We make switching tools easy. See the dedicated instructions below to bring your library from a previous tool into Papers.

#### Papers 3/EndNote/Zotero/Mendeley:

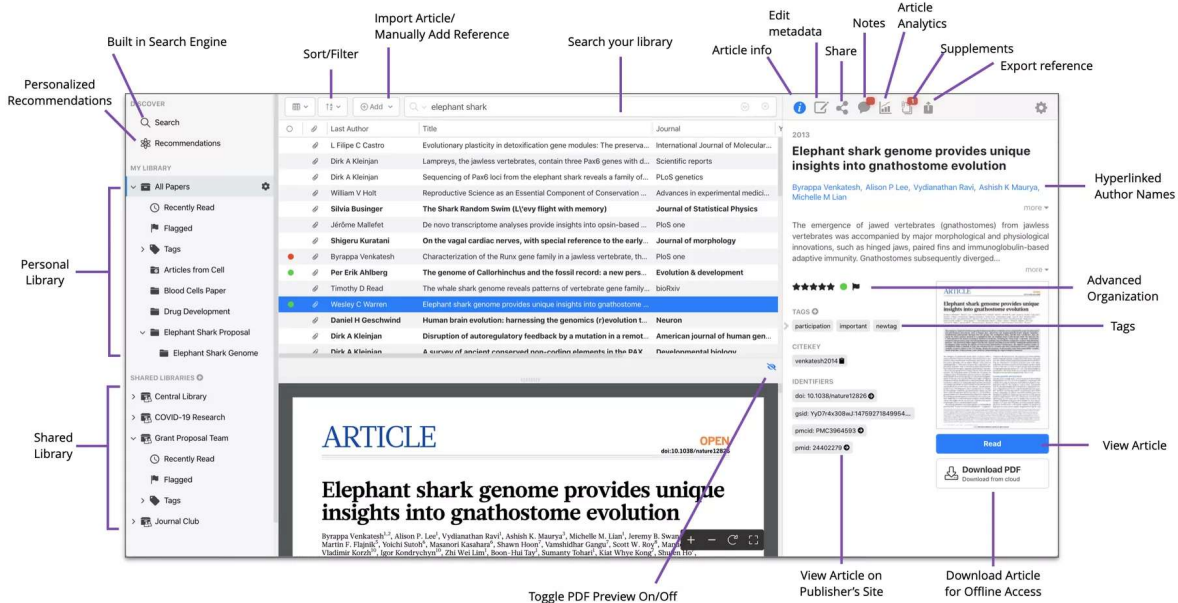
Please use our dedicated importers via the [Papers Desktop](#) app.

#### For other tools (Bookends/PaperPile/Refworks):

Full import steps outlined in [this article](#).



## LIBRARY LAYOUT & SET-UP



## Article Matching [\[video\]](#)

When articles import into Papers, they are automatically matched to the metadata so you know exactly what the article is. Sometimes, you may need to rematch metadata, which you can easily do by right-clicking the reference.

You will see the different options below:

### Match

If an article does not have any metadata you can select "Match" on the Info Pane to bring up the manual match feature. Here you will see a preview of the PDF that you can then type in the relevant metadata to populate the reference.

**Tip:** Less is more! Try just selecting part of the title to start. Most of that time, that's all you need for a match!

### Edit Details

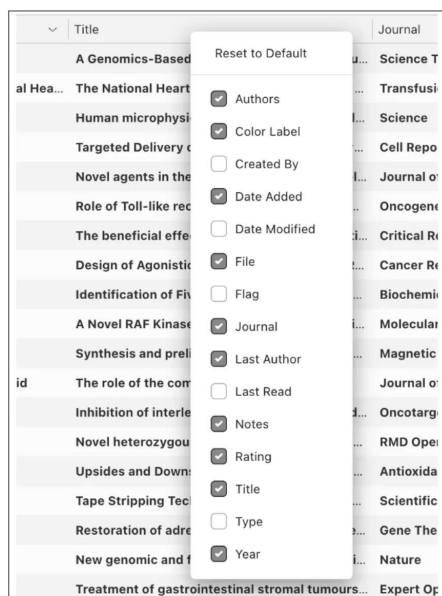
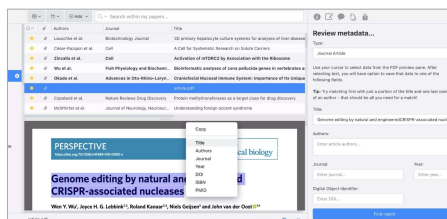
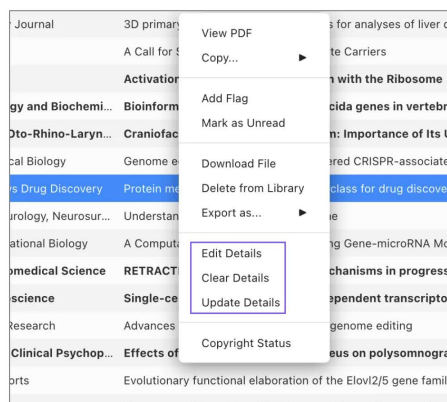
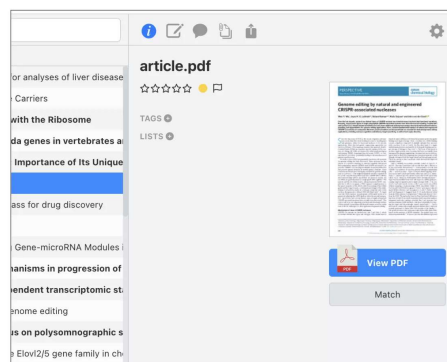
"Edit Details" will bring up the metadata editing pane, including the PDF preview so you can easily copy the fields to populate the reference.

### Clear Details

"Clear Details" will erase all metadata from the reference. The name will revert back to the original download name. From here, you can repopulate all the metadata fields, or use Lookup Details to find a match.

### Update Details

Selecting "Update Details" will rerun the matcher and populate any missing metadata fields. This needs metadata like a DOI or PMID to be present.



## Customized Library View [\[video\]](#)

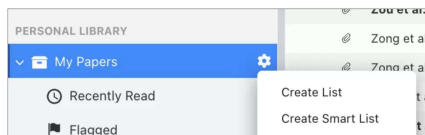
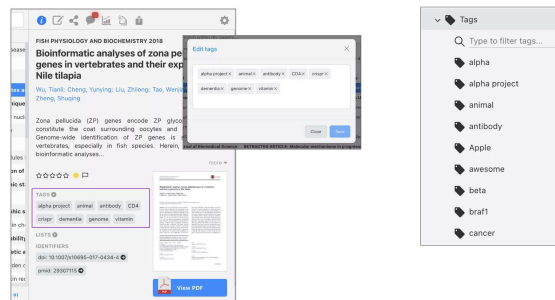
You can format your library window to suit your needs with 'Table' and 'List' views. In 'Table' view, columns can be customized to reflect data most relevant to you and also be used for easy sorting. By right-clicking on any of the headings in the table view, you can add and remove columns to suit your preference.

You can also move columns by again clicking on the column header and dragging left or right. Width of each column can be adjusted by placing your cursor between the header of two columns and dragging left to right.

# STAYING ORGANIZED

## Tags

Add tags to any articles in your personal or shared library by clicking on the "Tags" section in the right panel of your library. Each new tag will be added to an auto-generated list in the corresponding library and can be used as a search term. You can also select papers from your library and drag them onto existing tags to add tags in bulk. [Learn more](#)

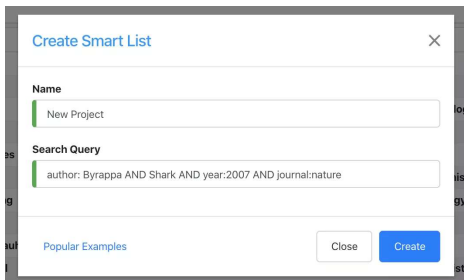


## Collections & Sub-lists

You can create collection folders within your personal and design a vertical file structure of up to 7 levels by simply dragging one folder on top of another. Get started by clicking the gear icon to the right of the main library title (ie. All Papers). [Learn more](#)

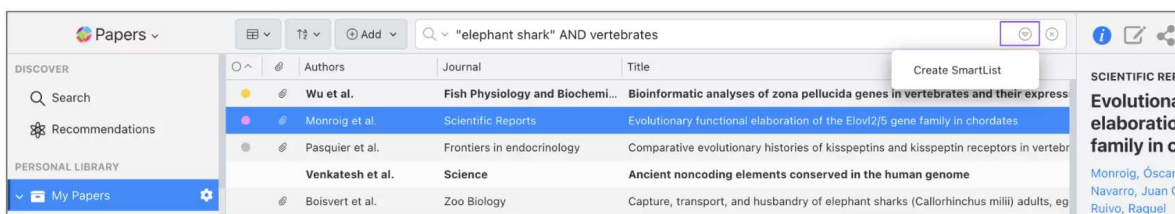
## Smart Lists

Smart Lists are organized lists built on saved searches in your library. After setting your search criteria, Smart Lists will automatically populate a collection of articles from a specific library that match your search terms. You can add a smart list to both a private/shared library. As with lists, Smart Lists created to shared libraries will be visible to all members in that library. [Learn more](#)



### Creating a Smart List

Use the search bar in a given library to create a search. You can keep it basic with a single keyword or use advanced search strategies to get very specific. When satisfied, click on Save Search in the dropdown on the right side of the search bar.

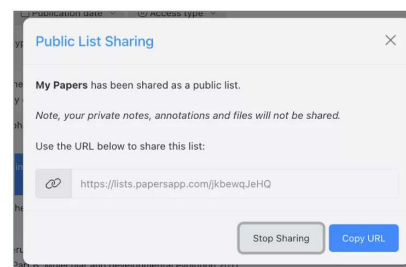


## Public Lists

Public Lists are like your normal folders with the added ability to share all the references and metadata publicly. You can create public lists that are both from your Personal and Shared libraries and even your SmartLists.

When you create a public list you are given a unique URL. You can share this URL with any collaborators, colleagues, etc who will then be able to access a full reference list.

[Learn more](#)





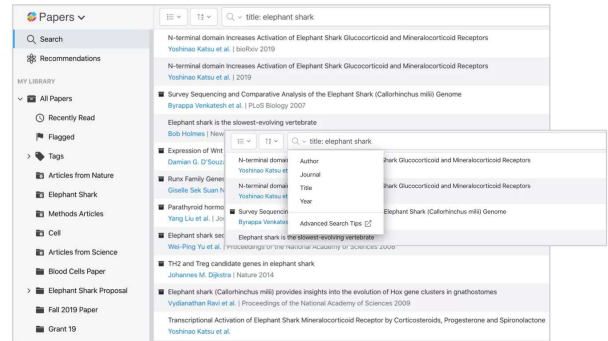
# POWERFUL SEARCH & DISCOVERY

Ensure you never miss another important paper benefiting from Papers' array of built-in search engines, powerful personalized recommendations and related article feeds. Our browser extensions provide easy importing of references/PDFs while browsing the web.

## Built-in Search

Within the app, search for new literature using the built-in search engine covering over 129 million articles. Use boolean search terms or click to expand the search menu to add filters and narrow down searches like: year, author, journal, article title. Learn more about our advanced search filters here: [Advanced and Syntax Searching](#)

Searching within one's existing library supports full text search of both article and annotations.

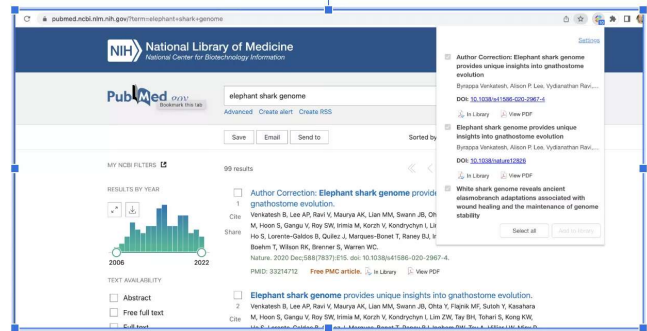
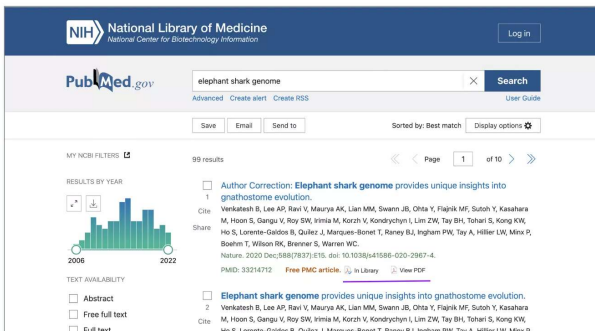


## Browser Extensions [\[video\]](#)

You can easily add papers to the library using our handy browser extension. Search for papers on sites like PubMed, Dimensions, Google Scholar, bioRxiv and journal websites. The extension will automatically show if you already have the paper in your personal or shared library, and for those not in your library, the extension allows you to add those references and PDFs (where applicable) directly into any collection within the personal or shared library.

Chrome: [rdcu.be/bzwBG](https://rdcu.be/bzwBG) Microsoft: [rdcu.be/6WVZ](https://rdcu.be/6WVZ) Firefox: [rdcu.be/bRpUJ](https://rdcu.be/bRpUJ) Safari: <https://rdcu.be/chpAB>

You can also save web pages by simply clicking on the Papers extension icon in your browser.



**Library Status:**

- Add to Library** This article is not currently in your Papers library. Click to add metadata and attempt to access full-text. Hover to right of button to reveal drop down to save directly to a Papers library or list.
- In Library** Metadata of the article is already in your Papers library. PDF not attached.
- In Library** Metadata & PDF of the article is already in your Papers library

**Access Channels**

- View PDF** Full text is available via Open Access or has already been added to your personal library or a shared library that you are a member of. Clicking button will open PDF in new tab.
- Get PDF** Full-text access may be available but requires clicking 'Get PDF' which prompts the extension to check if open access via hybrid journals, or if access is available through institutional proxy. For Enterprise customers, this will also check your corporate subscriptions or our document delivery services if configured. If full-text is available, it will be added to your library.

**SCIENTIFIC AMERICAN**

Coronavirus Health Mind & Brain Environment Technology Space & Physics Video PA

KISTIPK THE KAVLI PRIZE

## Revealing the Genes that Shape the Human Brain

Neurologist Christopher Walsh discovered genes that direct cerebral cortex development. We asked him what they reveal about intelligence, psychiatric disorders, and the nature of being human.

This article was produced by The Kavli Prize for Scientific Achievement and is a collaboration between the Kavli Prize and Scientific American.

Title: Revealing the Genes that Shape the Human Brain

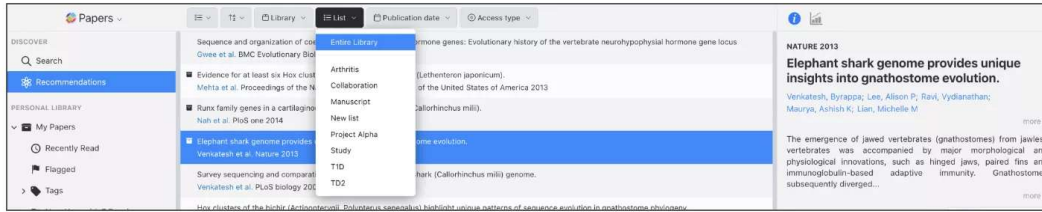
URL: <https://www.scientificamerican.com/custom-media/>

Notes:

My Papers

## Personalized Recommendations [\[video\]](#)

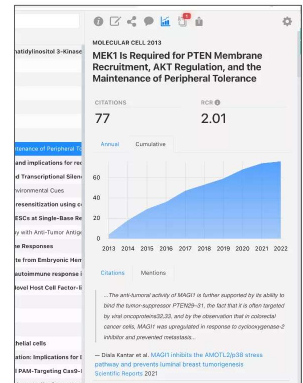
Ensure you never miss another important paper. Our recommendation engine leverages our full-text search engine to deliver hyper-specific suggestions of relevant papers based on selected filters such as personal or shared libraries, collections, published date, or even access type (open access/ paywalled). A perfect compliment to existing discovery paths.



## Contextual Citations (Mentions) [\[video\]](#)

Using our full-text index of more than 120 million articles, our popular “Mentions” feature shows the reader not just a citation, but also a snippet of the original text in which the citation appears, contextualizing the citation. Each citation is hyperlinked to bring up that papers in our in-app search.

The data fueling Mentions is dynamically updated to ensure that recent publications are reflected each time you open the panel.



## ENHANCED PDF READING [\[video\]](#)

ReadCube Papers encourages you to dive deeper into each article for its full-screen Enhanced PDF reader, which supports clickable inline citations, 1-click access to supplements and high-resolution figures, annotation tools, advanced article metrics including citation history, relative citation ratio (RCR) and altmetrics.

**Menu Options**

- Supplements
- Metrics (473 Dimensions, 417 Altmetric)
- Related Articles
- References
- Export Citation

**Highlighted Data & Supplemental Material**

Author Details: Byrappa Venkatesh, Comparative Genomics Laboratory, Institute of Molecular and Cell Biology, A\*STAR, Singapore, Singapore 138673.

**Page Scroll**

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**Annotate, Print & Export Options**

**Annotation Tools**

Highlight - Underline - Strikethrough - Free Hand - Sticky Note

**Document Menu**

Zoom - Rotate - Fit Width - Thumbnails - Outline - Search

## SHARING & COLLABORATION

**Create Shared Library**

Papers supports group collaboration with other Papers users using shared libraries, where you can share and organize references, papers and annotations with colleagues. Papers supports responsible sharing. Learn more at [howcanishareit.com](https://howcanishareit.com).

Name

Invite people | Invite groups

Enter emails to invite users...

Invite with permissions: Member

Advanced Sharing Options [Learn More](#)

Close Create

In addition to individual library management, flexible team spaces enable you to share references, PDFs, and annotations between colleagues! With unlimited storage, you can create up to 5 shared folders with 25 people in each library. Enterprise plans offer expanded sharing plans.

### ***Creating a Shared Collection***

By simply clicking the + icon button next to “Shared Libraries”, you can create a shared collection, then add content from your desktop directly or from your personal library collections. Collaborators can be easily added by email and gain access to collection content and even contribute additional material.

Alex Hodgson  
01/12/2022

A In contrast to the psychoactive constituent tetrahydrocannabinol (THC), CBD demonstrates no direct effect at cannabinoid receptors 1 and 2 (CB1 and CB2) but modulates the effect of agonists suggesting an allosteric function

[Review & compare with Edwards et al. findings.](#)

### ***Shared Annotations***

Share notes and annotations on any article from your shared libraries with your colleagues. All annotations are automatically synced and added in real time.

With author attribution, you can see which collaborator made each note including the date to stay organized within your annotations.

**Include annotations?**

Do you want to include the annotations and notes in the destination copy?  
The original annotations will not be affected.

Discard Include annotations

### ***Sharing Between Libraries***

If you drag an item that has been annotated into another library, you will have option to copy of notes and annotations as well, or bring over a clean copy (via Discard).

## SYNC & STORAGE

### ***Access your Papers library across all of your devices***

With unlimited secure cloud storage for both personal and shared library collections, Papers allows you to access references and PDFs (including notes and highlights) as well as all the powerful discovery features from any device. ReadCube Papers offers a web app (available on all modern browsers) as well as companion desktop and mobile apps for Mac, PC, Android and iOS. Visit the [Download Center](#) for access to all of our apps.

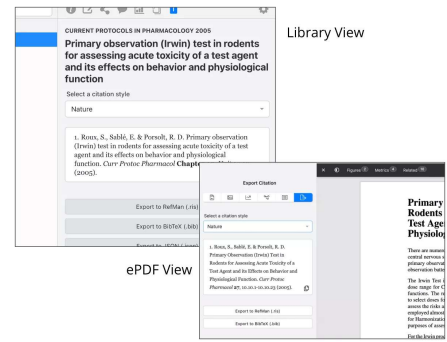


# CITING

## Quick Citation Export Options

Easily copy a reference directly from within your library. On the "Export Citation" panel you can choose from over 10,000+ styles to copy to your clipboard. Easily set a default citation style in the desktop app under Papers Settings.

Quick citation generator available in library (right panel) and PDF view (left panel)

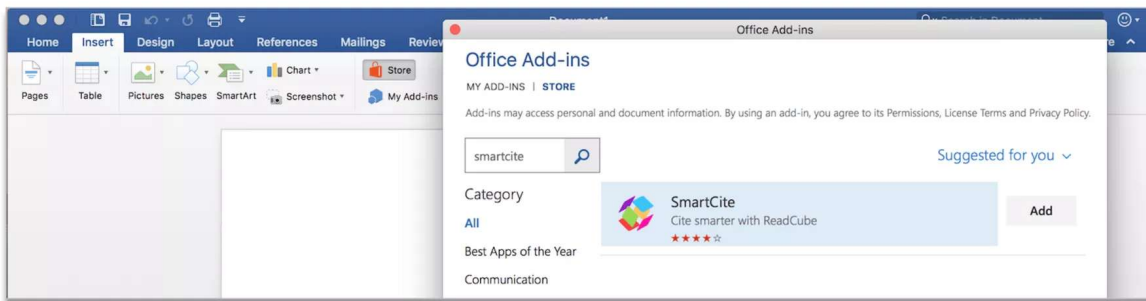


## SmartCite for Word/Google Docs

### INSTALL

#### Microsoft Word 2016+

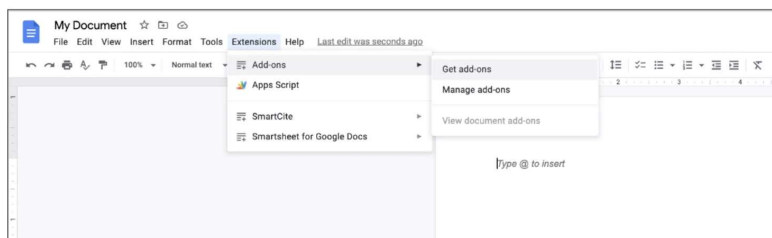
Look for SmartCite in Microsoft's Add-In Store. You can find the store by going to "Insert" in the menu of Word 2016 and selecting "Store". You'll then be able to search for "SmartCite" and watch it install into your "References" Toolbar of Word. Once you've launched SmartCite for the first time, you'll be prompted to login to your ReadCube Papers account. You'll instantly see your ReadCube Papers library appear in the right side panel.



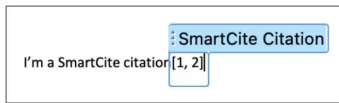
#### Google Docs

Our Google Docs-compatible citation tool makes writing your next paper a breeze. SmartCite is fast, easy-to-use, supports over 12000+ styles and most importantly, makes it easy to collaborate on documents with colleagues.

In Google Docs, go to "Add-Ons" and select "Get add-ons" to be taken to [Google Marketplace](https://www.google.com/marketplace). Search for "SmartCite", select and install. You'll be prompted to log in via your Papers account. Once you've done so, your library will appear in the right sidebar.







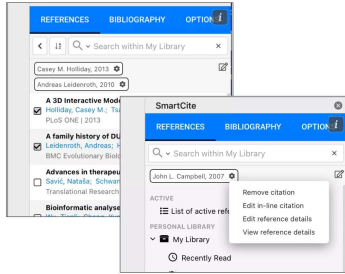
## START CITING

You can search your library or click on a list or tag to browse through the various folders. The search within SmartCite offers same library search capabilities that both web/desktop offer.

When you've found the reference you are looking for, check the box to the left of the reference and click "Insert" at the bottom of the panel. Your references will automatically be inserted at the place where your cursor is in the document.

### Editing/Customizing References

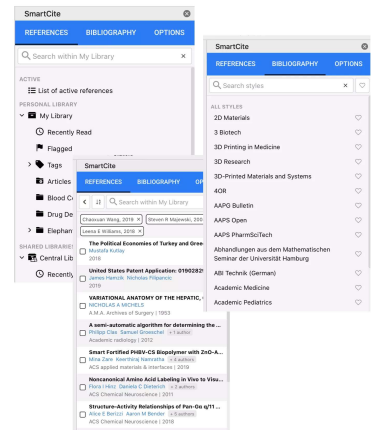
References can be changed at any time by simply moving their position (ie. copying and pasting), clicking on reference to reveal edit options to remove, order or add additional references. You can also select the reference box by highlighting it with your cursor and clicking delete to remove it completely from the document.



## INSERT BIBLIOGRAPHY

Whenever you are ready, go to "Bibliography" and choose from over 10,000+ citation styles - we will take care of the formatting! Click "Insert Bibliography" to add it to your documents. Need to change your style? Simply select a new style and click on "Update Bibliography" Click on the star icon beside style names to add them to your favorites list.

If you have a custom style you'd like to import, go to the OPTIONS tab and choose option to "Manage Custom Styles"

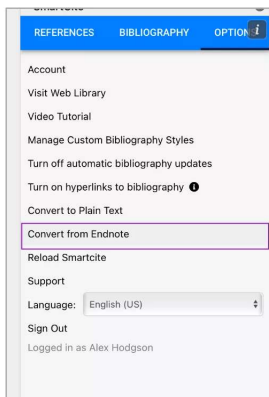
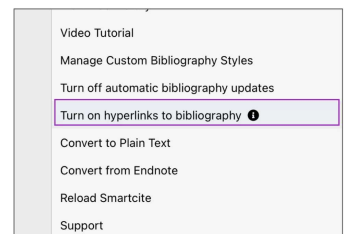


## COLLABORATE

Want to share your paper with a colleague who uses ReadCube Papers? Simply send them the Word file or add them to the Google Doc. When they launch SmartCite, all your references will automatically be indexed and they can continue working on the document seamlessly.

## HYPERLINK CONVERTER

Converting to hyperlinks will automatically link inline references to the corresponding item in your bibliography. Please note that to click into an inline reference with this feature activated, you will simply need to use your keyboard to move the cursor into the inline brackets to allow for editing.

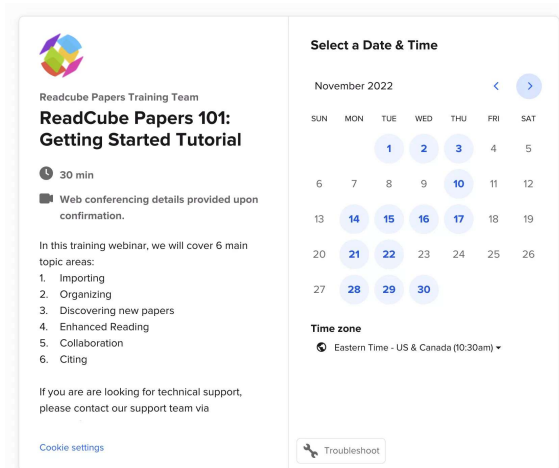


## ENDNOTE CITATION CONVERTER (WORD ONLY)

Coming from a different tool can be a pain if you have to manually change your active citations. That's why we created the Endnote Citation Converter so you can let SmartCite convert your citations from Endnote so you don't have to restart your manuscript writing.

# Resources:

## JOINING LIVE WEB-BASED TRAININGS



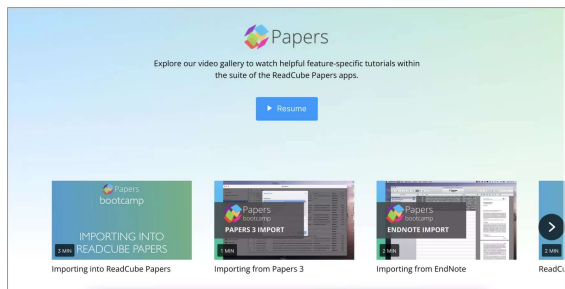
Join one of our daily live [training session](#) with one of our dedicated community members who will walk you through the basics of Papers.

Once you've selected a time that works for you, please select 'add to my calendar' upon the confirmation page.

Session topics include:

- Importing content from your desktop or other tools
- Finding new papers & getting full-text access
- Reading & annotating
- Organizing content in personal and shared libraries
- Citation writing
- Q&A

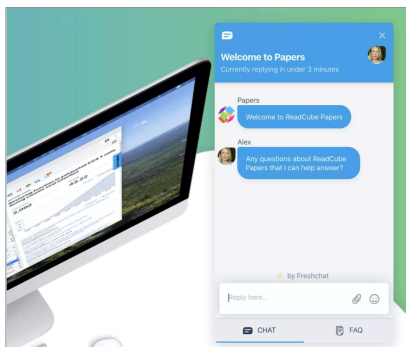
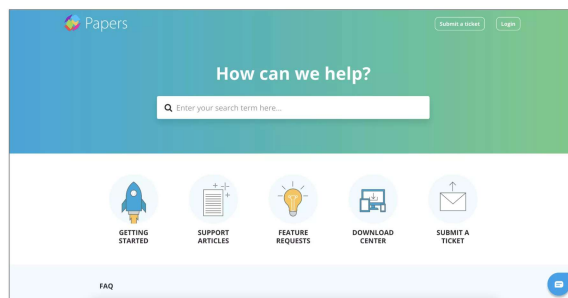
## ADDITIONAL TRAINING RESOURCES



View our other training materials to get the most out of Papers across our suite of apps.

Visit our [Papers Bootcamp](#) to watch helpful feature-specific tutorials.

Browse through our in-depth articles on our [knowledge base](#) for helpful solutions to any questions you may have.



Speak instantly with one of our support team agents to ask any questions or troubleshoot an issue via our [live chat feature](#).