Getting Started with ReadCube

LIBRARY USER GUIDE / V 3.0 / AUGUST 2024



Welcome to ReadCube

Within this document, we will be sharing information on how to:

- Sync & store across multiple devices
- Import content from your desktop or other tools
- Match and edit article metadata
- Customize your library view
- Method for organizing your libraries
- Search & discovery
- Collaboration & sharing
- Create a bibliography using our citation writing tool, SmartCite

Need help or guidance? Don't hesitate to reach out to Support (<u>support@readcube.com</u>) or your dedicated Client Engagement Manager!



Library Navigation

BRIEF OVERVIEW



Access From Anywhere

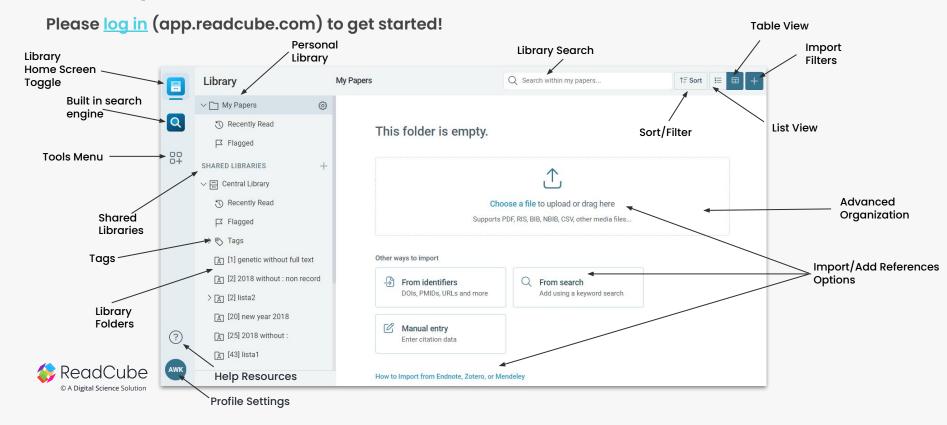
Multi Device Syncing

With unlimited secure cloud storage for both personal and shared library collections, ReadCube allows you to access references and PDFs (including notes and highlights) as well as all the powerful discovery features from any device. ReadCube offers a web app, desktop (Mac & PC) and mobile app (Android and iOS). Visit the <u>Download Center</u> to see the various applications or navigate directly to the <u>web app</u>.



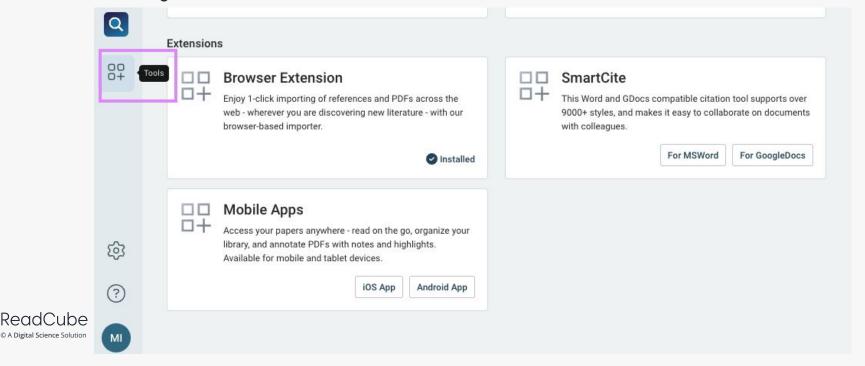


Library Feature Overview



Tools Menu

Once you've <u>logged in</u>, navigate to the Tools menu to download a browser extension, mobile app, or navigate to instructions for installing SmartCite

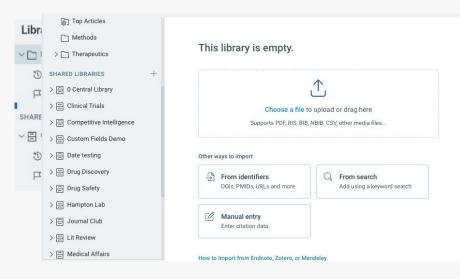


MULTIPLE IMPORT OPTIONS



Drag & Drop

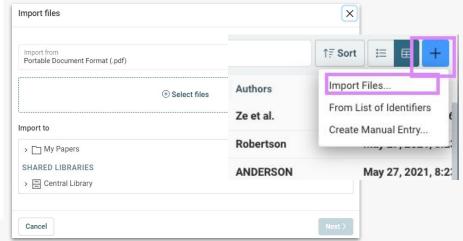
Navigate to the library you'd like to import to, select the PDFs (or other supported file types) and drag & drop them into the library.



Import Files Using Menu

Import a variety of file types: PDFs, RIS, BIB, NBIB, or CSV.

Click the'+' & select 'Import Files' to launch the import tool. Click the dropdown menu to select the desired format, file you'd like to import, and specify which library(s) you'd like to import to.



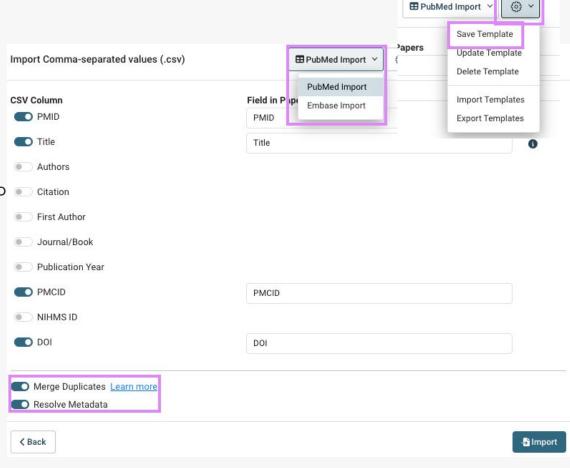
CSV Imports & Templates

Different databases may have varying column headers, so you have the ability to map metadata fields, ensuring each is linked to the correct metadata point.

Select the fields you'd like to import and map them to the appropriate metadata field. Easily save the template to simplify future imports!

See the next page for information on merging duplicates & resolving metadata!





CSV Imports & Templates

You have the option to:

- Merge duplicates: Prevents duplication by detecting if a reference already exists within the library based on the DOI/PMID
- **Resolve metadata:** Populates the metadata based upon the DOI/PMID

Tip! Avoid using 'Resolve Metadata' for imports with conference proceedings, as multiple proceedings may share the same DOI, potentially overwriting the metadata you're trying to import. This also applies when including foreign language titles.



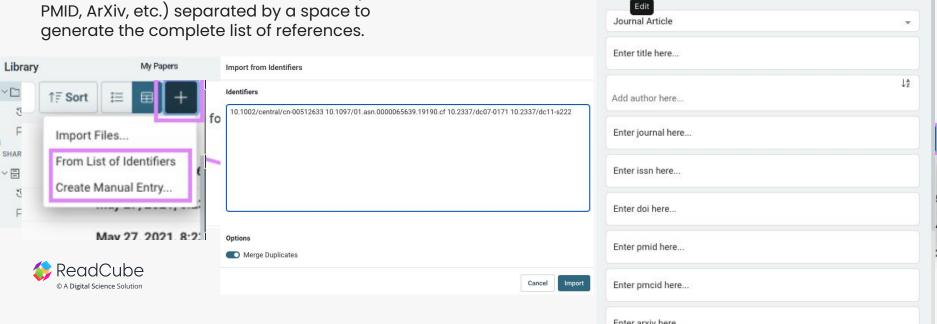


From List of Identifiers

Click the'+' & select 'From List of Identifiers' to launch the tool. Paste a list of identifies (DOI, PMID, ArXiv, etc.) separated by a space to generate the complete list of references.

Create Manual Entry

Click the'+' then 'Create Manual Entry' to get started. Select from a variety of content types which update the various fields for you to populate.



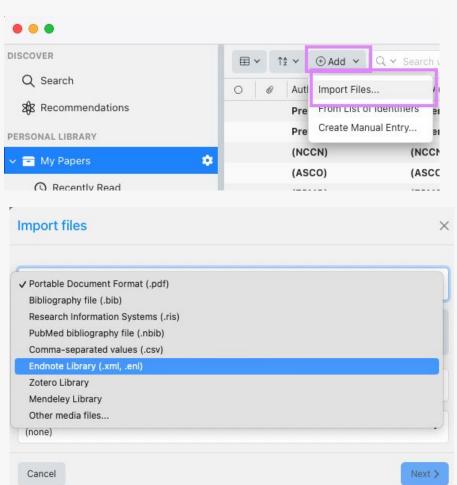
From Other Reference Managers

Easily migrate your libraries from other reference managers using our import tool located in the *desktop app*. Majority of users import using the desktop, then navigate back to using the web app moving forward.

Navigate to the <u>Download Center</u> where you can install the desktop on both Mac & Windows.

Please see this <u>support article</u> for detailed instructions for various reference managers. The next page includes information on migrating from <u>EndNote</u>.





Migrating from EndNote

Easily transfer your EndNote library to ReadCube using the desktop application!

This <u>support article</u> guides you through the steps to complete.

Please be aware:

- You must use the desktop application to transfer the library, however after transferring you can migrate back to using the web app
- EndNote does not export ratings. Unfortunately, this means all of your ratings will be lost when your files come over.
- In order to transfer the library structure from EndNote (folders & subfolders), you must:
 - Use ReadCube desktop version 4.37 (or later)
 - Use EndNote version 9.3.3 (or later)
 - Export your EndNote library in .enl format (not .xml)



Article Matching

METADATA



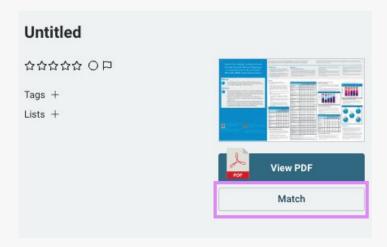
Metadata Matching

When articles are imported ,they are automatically matched with the appropriate metadata based upon the DOI, making it easy to identify each article. If the article does not contain a DOI, you'll be presented with the opportunity to match the article with they respective metadata.

Match

If ReadCube was unable to identify the content, the information panel will present an option to "Match".

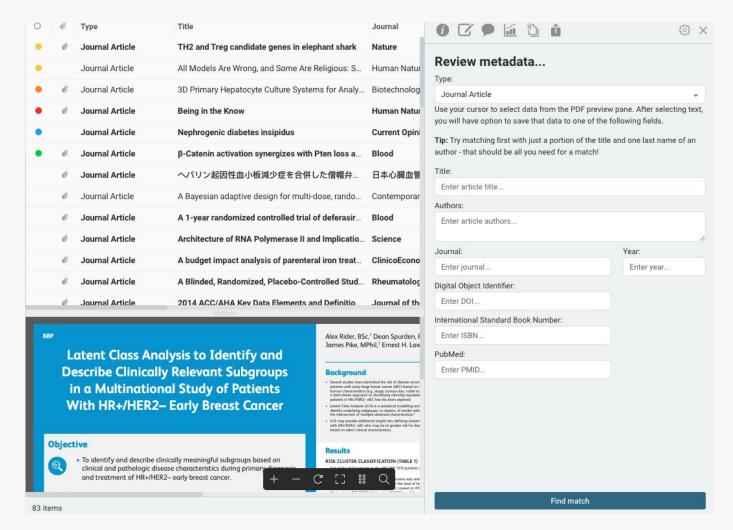
Upon clicking, you will see a preview of the PDF so you can easily refer to the article to obtain the relevant metadata to populate.





LIBRARY USER GUIDE

Tip: Less is more. Start by selecting only a portion of the title—most of the time, that's all you need to find a match!





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Editing Metadata

To perform the actions below, simply right click on the reference.

Edit Details

In addition to above, you can simply navigate to the 'Edit Details' to revise the associated metadata. Don't forget to click save after making revisions!

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 'match' to populate.

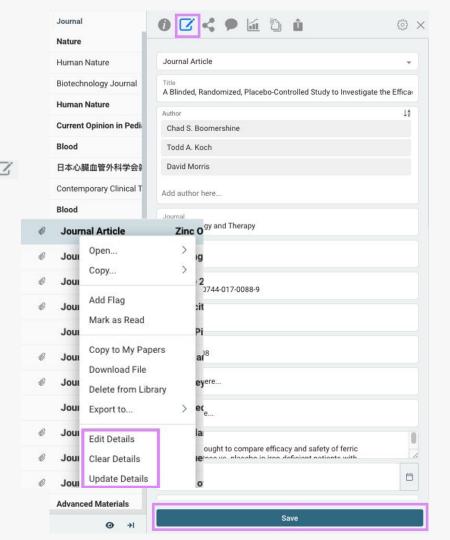
tab

Update Details

Selecting "Update Details" will update the metadata to align with what we have in our database based upon the DOI/PMID. This can also be run at the library level by clicking on the cogwheel.

Tip! You do not want to run this across the library if it contains any conference proceedings, unless the content type is set to 'conference paper' which would exclude the reference(s) from the update. This also applies if the library contains any foreign language titles.





Library Customization

TABLES AND LISTS



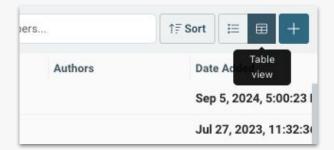
Customize Your Library

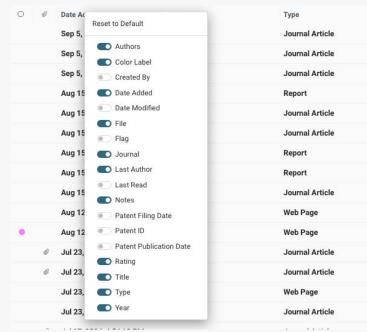
Table and List Views

Customize your library view with ease by switching between list or table formats using the buttons in the top right corner. These changes are personalized and won't affect other library members.

In table view, columns can be customized to reflect the data most relevant to you, which can also be used to sort the library.

To customize, right click on the header which will trigger the full list of options available to add/remove. You can also drag & drop the columns to rearrange their order. To adjust the width of a column, hover between two headers and drag.







Staying Organized

TAGS, LISTS, and SMART LISTS



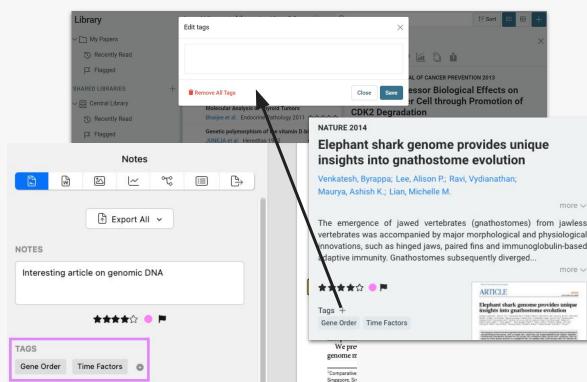
Tags

Tags are the most popular method of organization as they add a searchable.

Add tags to any articles in your personal or shared library by clicking on the 'Tags' section in the right-hand panel of your library.

You can even add them within the enhanced viewer using the left-hand panel.





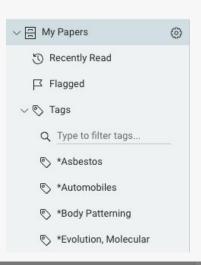
Tags

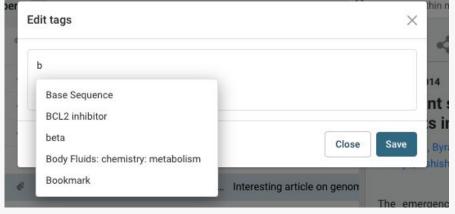
Once you've applied tags to your library, a tags section will appear below. Click a tag to filter references with that tag applied, or drag and drop references onto a tag to apply it to additional items.

Tip! Use Shift or Ctrl/Command to apply tags to multiple references at once!

When adding tags, the library offers predictive text, showing existing tags to help you maintain a consistent tagging structure."







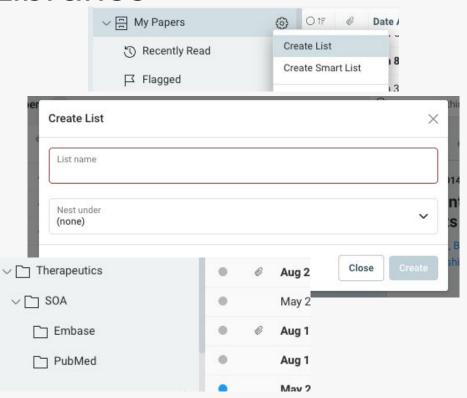
Lists

A list is like a folder on your desktop. Create them to manually organize your library.

You can even create sub-list which go up to 7 layers deep.

To create, simply click the cogwheel of the library you'd like it created under and give it a name. You have the option of nesting using the menu or you can click on the cogwheel next to the list.





Smart Lists

Smartlist offers an automated way to organize your library based on a saved search. Once created, this dynamic folder will automatically update to include content that meets your defined parameters.

To create, complete your search, then click the downward arrow & select Create Smart List. (You can also click on the cogwheel of the library to

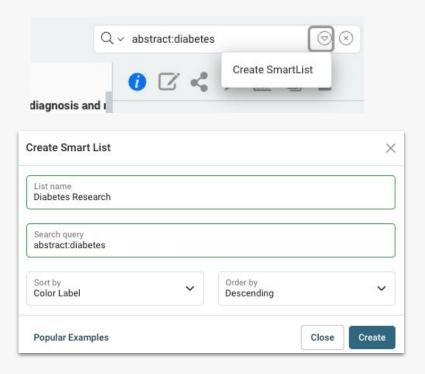
Create one.)

Q × abstract:diabetes

Create SmartList

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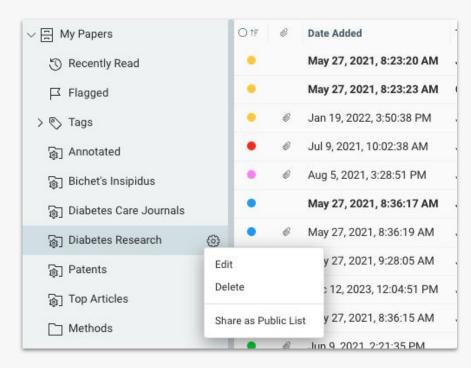


Smart Lists

Moving forward when content is added to the library falling within the parameter, it will automatically be included.

Easily edit the query/name by selecting the cogwheel.

Check out <u>this article</u> for more details, including predefined examples you can add to your personal library with a simple click!





IN-APP SEARCH & INTEGRATING WITH YOUR EXISTING WORKFLOW



Search

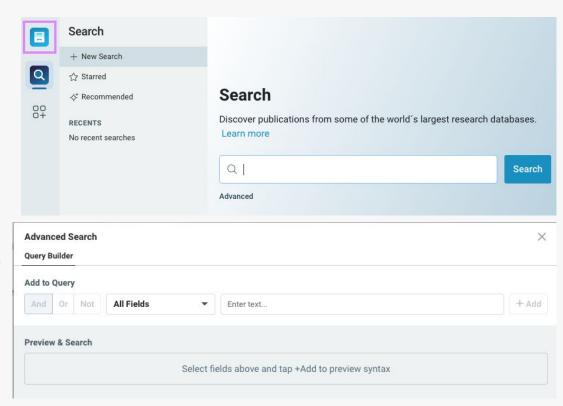
Explore new literature with ReadCube's search and discovery tool, powered by Dimensions, which provides access to a database of over 140+ million citations.

Apply boolean operators (AND, OR, NOT) to combine or exclude criteria. For example:

- AND: Ensures all specified criteria are met
- OR: Includes results that meet any of the specified criteria
- NOT: Excludes results that meet the specified criteria

Click 'Advanced' to open the query builder.





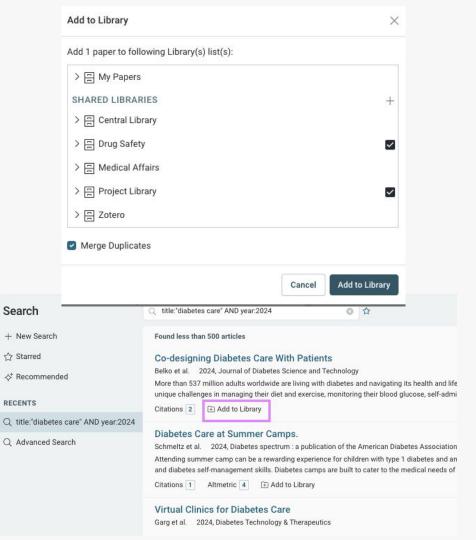
Search

Please see this <u>Advanced Searching support article</u> outlining which fields are searchable & recommendations on how to build queries.

Adding references to your personal or shared library:

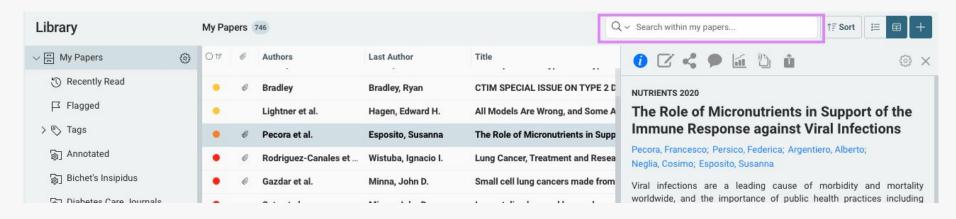
- An individual reference: click '+ Add to Library'
 & determine which library(s) it should be
 added to
- Multiple references: select them by clicking one, then hold down shift (all references between the selection) or command/control (picklist) to determine which you'd like added





Searching within a library

While our discovery tool searches only metadata, once you've added full text to your library, you can search across the full text within that library.



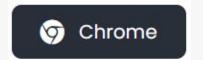


Browser Extension

Seamlessly integrate with your existing discovery workflow by installing our browser extension, compatible with all major browsers. Click the link below to install or navigate to the Tools page within the web app!

It integrates with scholarly websites such as PubMed, Google Scholar, journal sites, preprint servers, and more!

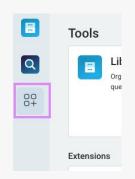
The extension will automatically indicate if the content is available in one of your libraries. If it's not, you can easily add it!











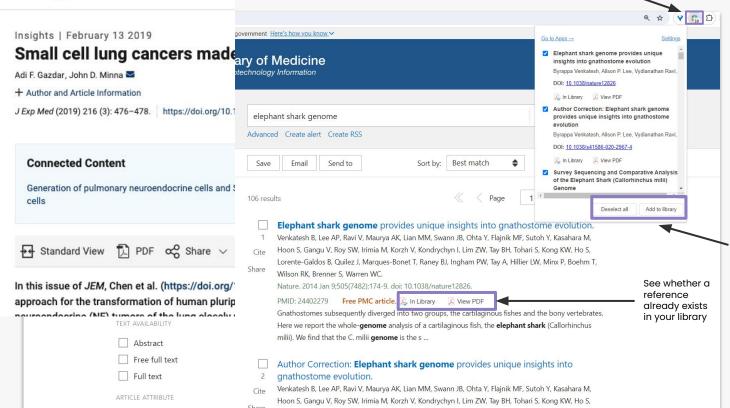


Browser Extension

iuide to Buttons	
ibrary Status:	
≡+ Add to Library	Metadata of paper is added to library. PDF will also be added if View PDF button is beside "Add to Library button"
≡ In Library	Metadata of article is already in ReadCube Papers library. PDF not attached.
N Library	Metadata & PDF of article is already in ReadCube Papers library.







Browser Extension Icon

Import

in bulk

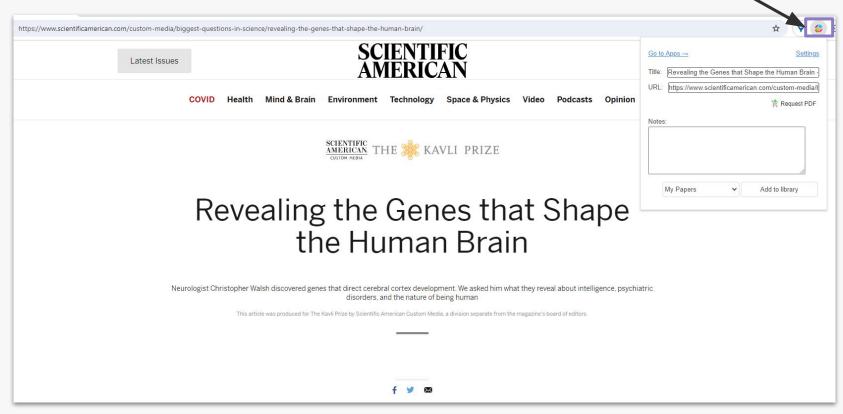
references



View PDF

In Library

Save web pages by clicking on browser icon





Contextual Citations Empowering Discovery

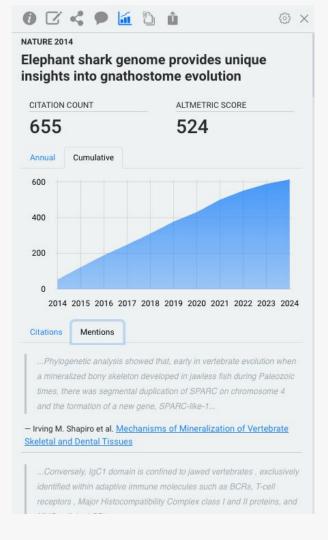
Our 'Mentions' features allows you to drill down through all the noise and see exactly how an article was referenced so you can quickly determine its relevance to your research.

Click the reference to navigate to the search to locate it.

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

See video tutorial for more information.





Sharing & Collaboration

FLEXIBLE TEAM SPACES



Sharing & Collaboration

Shared Libraries

Shared Libraries offer a centralized space for you and your colleagues to store, share, annotate, and collaboratively organize content.

To create one, click the + icon next to 'Shared Libraries.' From there, you can invite colleagues from your organization and define how you'd like them to be able to interact with the content.

As the creator you're designated an admin, but you can easily add others to help you manage. See this **support article** for more information on the various permissions.



Create Shared Library X 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. Library name Project ABC Invite people | Invite groups Enter emails to invite users... ■ demo@contoso.readcube.c... × Invite with permissions: Member > ▼ Advanced Sharii Admin Member Viewer Member Export PDFs: Viewer Print PDFs: Create & Manage Annotations: Create & Update Items: Delete Items: Copy to another library: Manage Lists: Close Create

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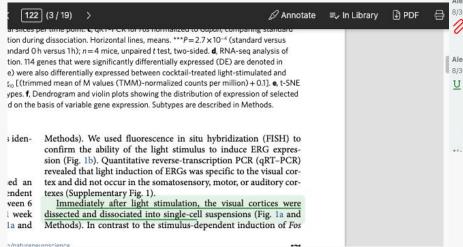
Sharing & Collaboration

Shared Libraries

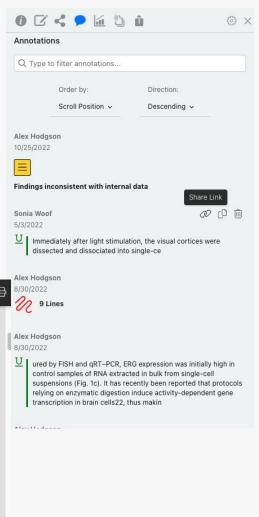
Notes and annotations are visible to all library members.

You can view the date, time, and creator of each annotation within the library view or enhanced reader.

Easily share specific annotations with others by copying a link directly from the library which will direct them to the annoation within the full text.







Sharing & Collaboration

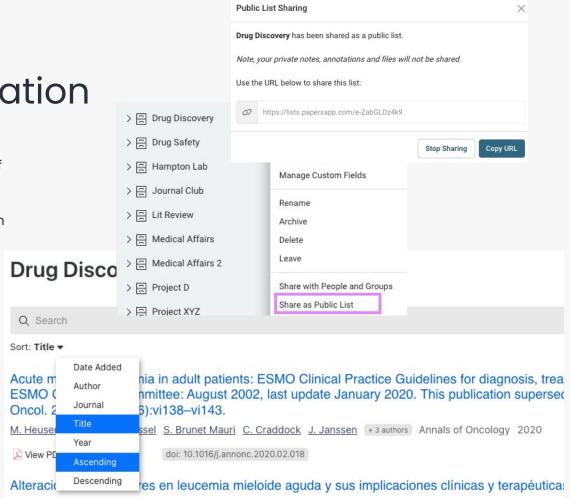
Public Lists

Public Lists allow a user to create a dynamic link of references to share with collaborators or contacts outside the organization who need to see what content is currently being reviewed. Simply click on the cogwheel & select 'Share as Public List'.

If shared with a member of the library, they can easily access any full text.

If they are not a member of the library, no full-text is shared unless it falls under an Open Access license, however they're able to see the complete list of references. They can be configured at a shared library level or you can get more granular and base it upon a list or smart list.





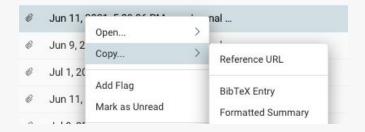
Exporting

PDFs, CSV, RIS, or BIB



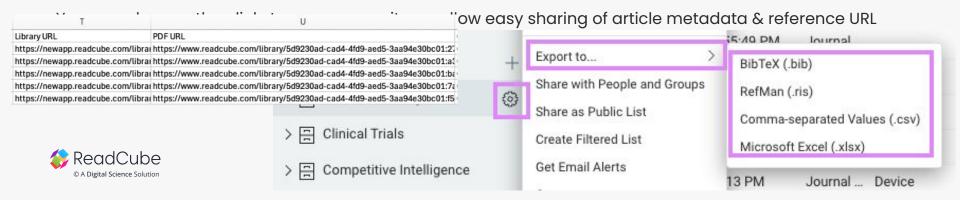
Exporting Content

BIB, RIS, CSV, & XLSX



Easily export all references within a library or list by clicking on the cog wheel > Export to, then select your desired format.

Tip! CSV & XLS exports include a 'Library URL' & 'PDF URL' (if applicable) so members of the library can easily navigate to the the reference within the library or the full-text PDF. To obtain a individual reference URL, simply right click on the reference > Copy > Reference URL.



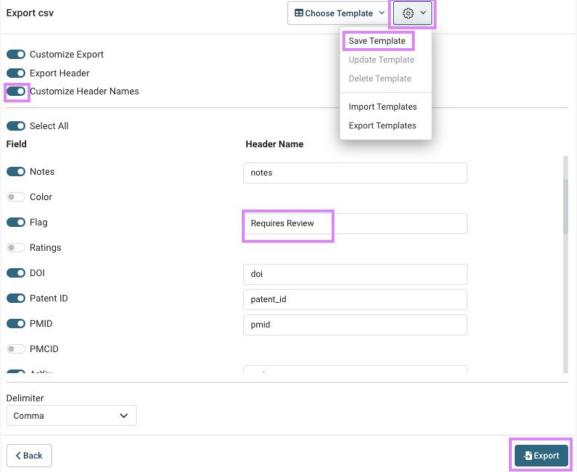
Exporting Content Customize Header Names

Customizable CSV Exports

Select the desired metadata fields and save them as a template for future exports.

You have the option of customizing the header names & selecting the delimiter:

- Comma
- Semicolon
- Tab





Where to go for support

Training & Support



Where to go for support

Customer Service: support@readcube.com or submit a help request

- For general platform questions or issues accessing the platform.
- To report any technical issues or disruptions in service.
- If you encounter any challenges or need immediate assistance outside of East Coast hours (8-5pm ET).

Client Engagement Manager

- To schedule group training(s)
- For discussions related to your long-term business goals, custom solutions, or strategic planning to optimize your use of our services.
- When you have specific questions about your account, such as tailored solutions, or product recommendations.
- If you're interested in exploring new opportunities or workflows with ReadCube.
- In case you encounter issues that require urgent attention or if you are not satisfied with the resolution provided by Customer Service.

Please remember that your Client Engagement Manager is here to ensure a seamless and tailored experience for your organization, while our Customer Service team is available to address general and technical inquiries efficiently.



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Where to go for support

Join a training session

Please visit the <u>Enterprise Training Calendar</u> to register for an upcoming session. Please note: This is a general session for users from all enterprise organizations. If you'd prefer a private session tailored to your organization, simply ask your administrator to coordinate with your Client Engagement Manager.

