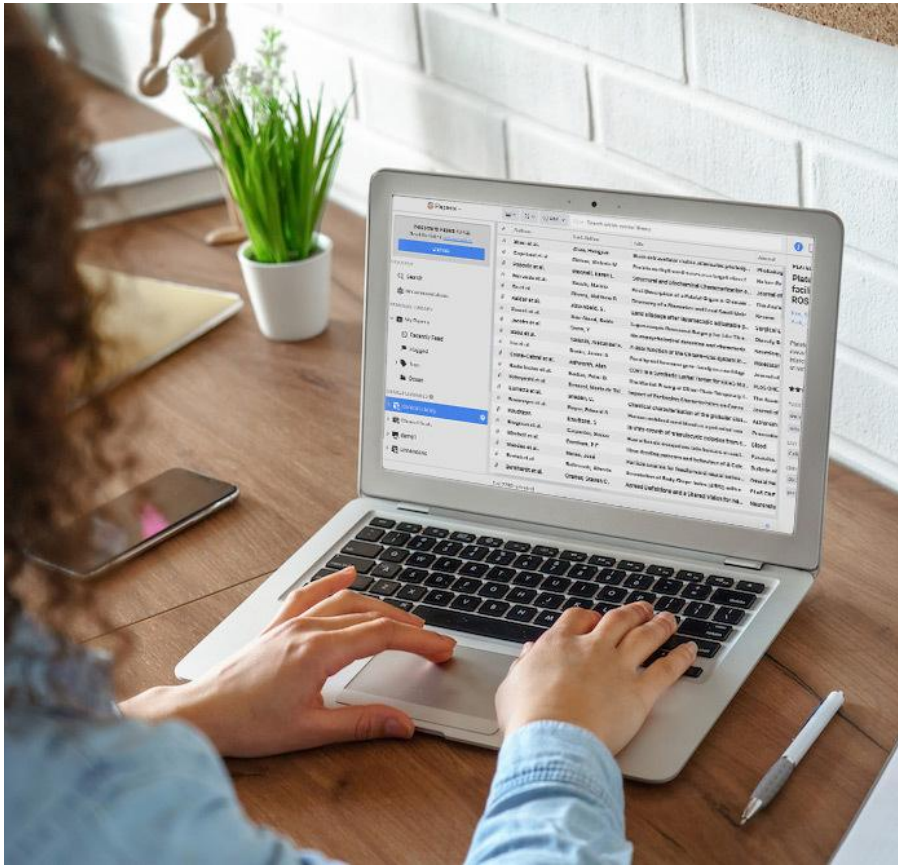
papers
by ReadCube

Papers Quick Start Guide

Version 5.0



Quick Start for Papers Pro & Essentials

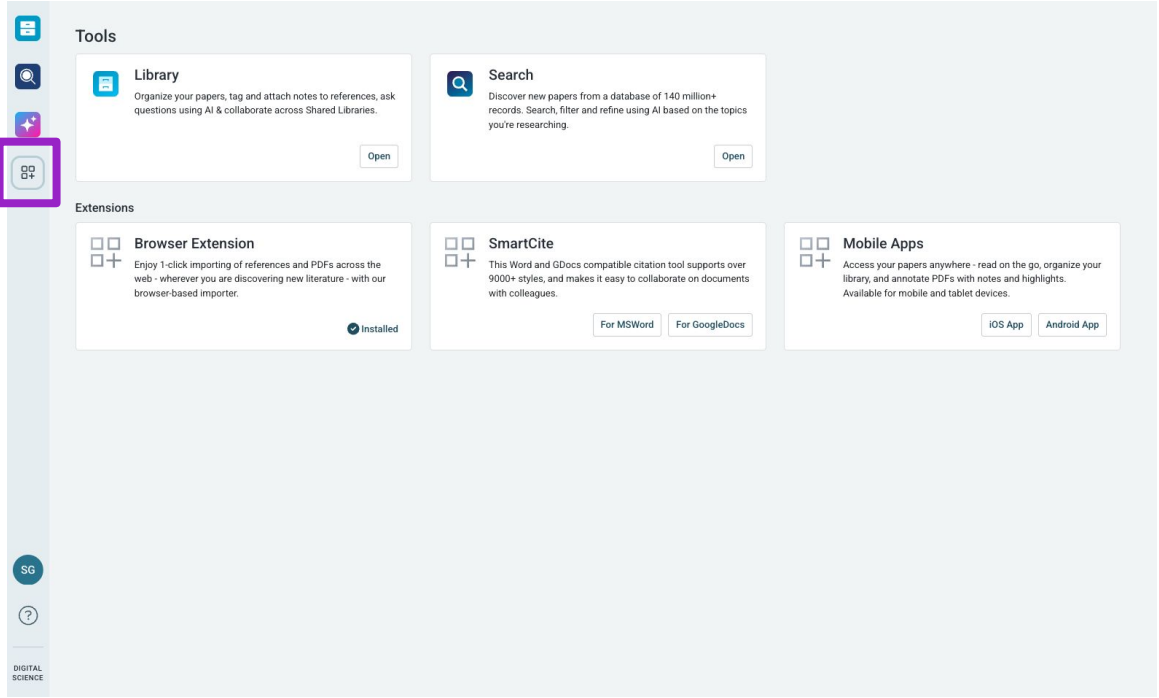
Welcome to your new personal research assistant! In this guide you will find how to:

1. Open your library and install extensions
2. Copy over libraries from other reference managers
3. Import your first articles including full-text PDFs
4. Organize your library with lists and tags
5. Create a shared library with collaborators
6. Read and annotate using PDF Enhanced Viewer
7. Use the AI Assistant to query PDFs and your library
8. Discover new research
9. Create bibliographies in Word and Google Docs
10. How to get help

If you're ever unsure or feeling stuck, please visit papersapp.com/help-center OR reach out to support@papersapp.com.

1. Open your library and install extensions

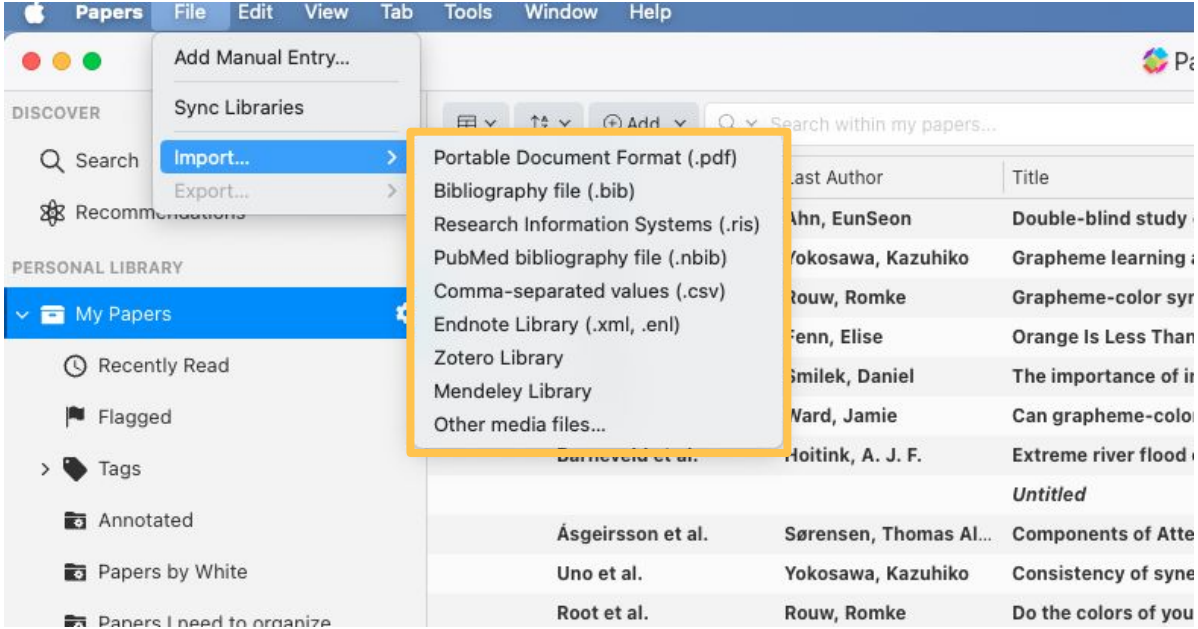
1. Open a web browser and go to app.readcube.com
2. Click on “Tool” icon in left menu to find extensions.
3. Install the browser extension for one-click PDF import.
4. Install SmartCite if you use Microsoft Word or Google Documents.
5. Install the mobile app on your phone or tablet.



2. Copy over libraries from other reference managers

If you have existing libraries in Endnote, Mendeley or Zotero

1. Install the Papers desktop for MacOS or Windows from the download center.
2. Open desktop app and choose File - Import.
3. Select reference manager.
4. Allow time for the import to process and remain online so that the items can sync with your Papers account.

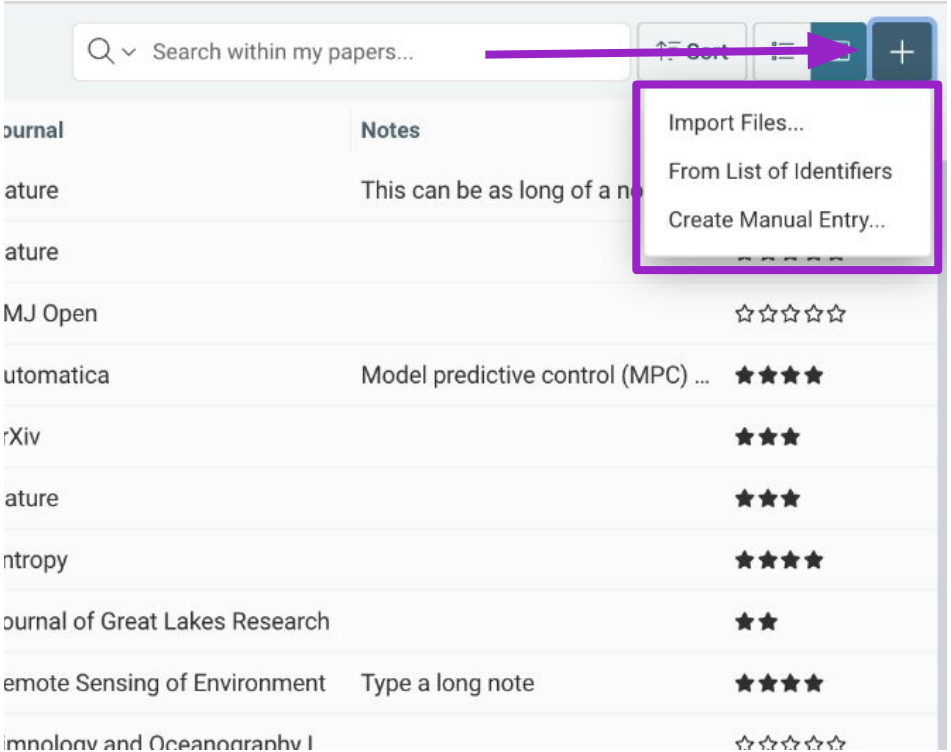


3. Import your first articles including full-text PDFs

Click on + in top right corner

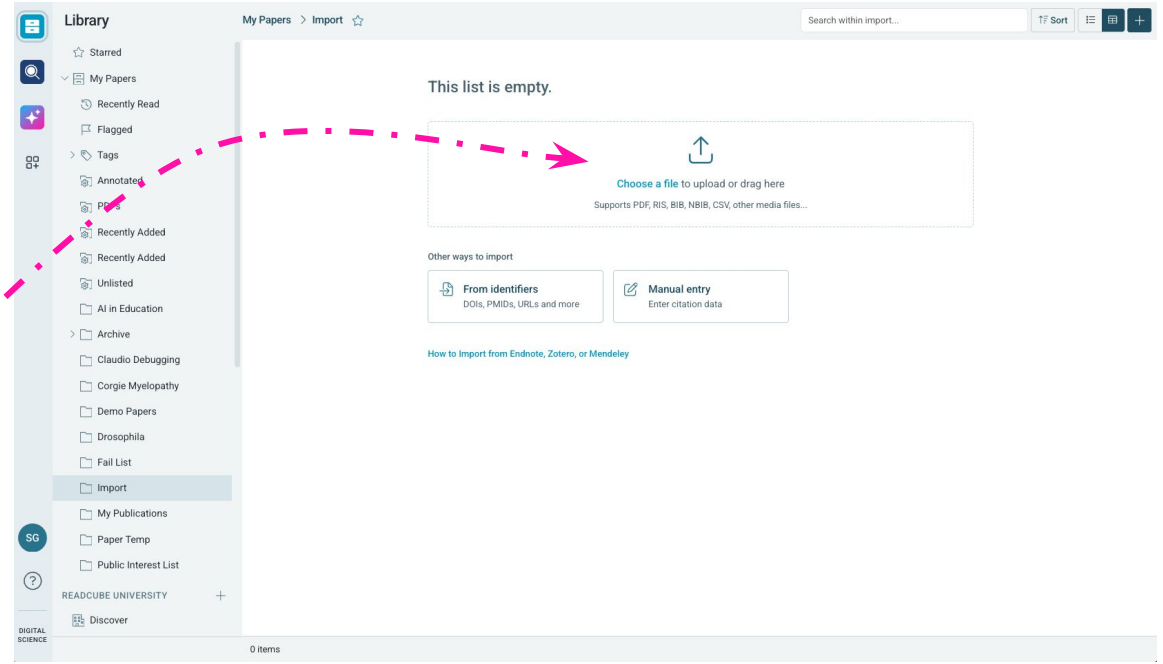
Add new files by:

1. Upload .bib, .ris, .nbib, or .csv file
2. Enter PMIDs, DOI, ArXiv
3. Create a record by typing in metadata yourself



3. Import your first articles including full-text PDFs

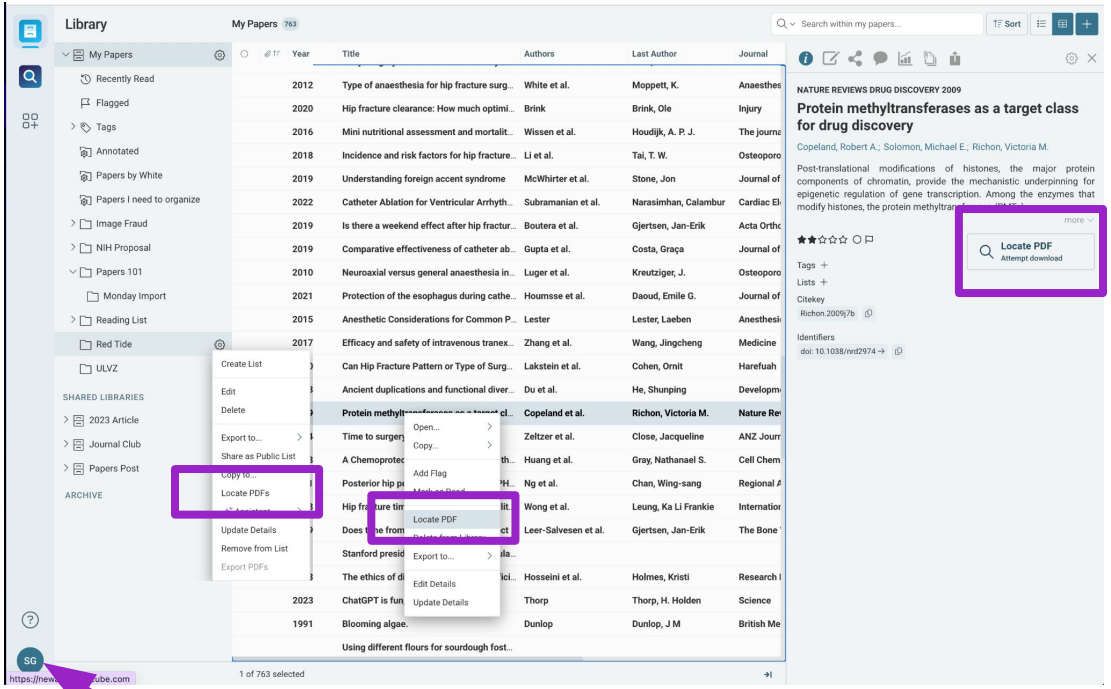
If you have PDFs on your computer, drag and drop them onto the library window.



3. Import your first articles including full-text PDFs

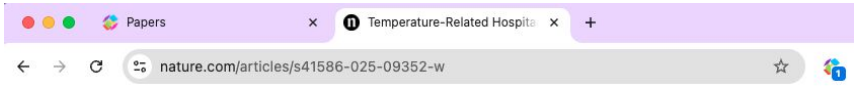
To locate full-text for saved items:

1. Make sure you have your proxy settings stored in your account, your are at your institution, or you are connected to your institution through a VPN server.
2. Click on "*Locate PDF*" in right-hand panel or by right-clicking with mouse on a record.
3. You can also select "*Locate PDFs*" in the list or library menu.

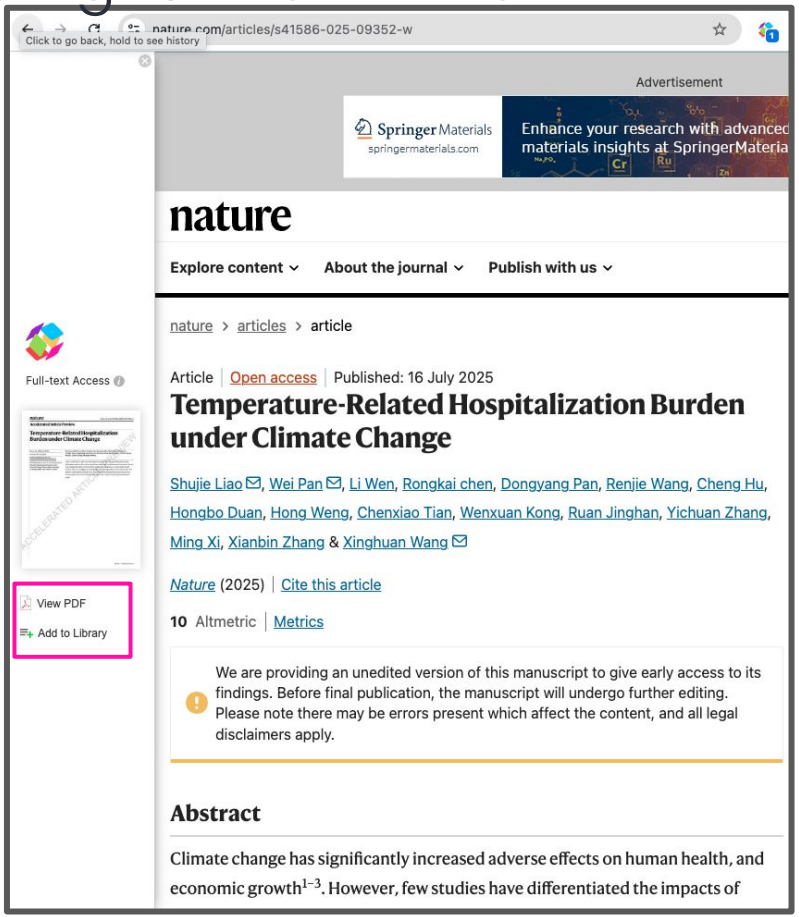


3. Import your first articles including full-text PDFs

Use Papers browser extension to add PDFs and metadata from journal websites and databases.

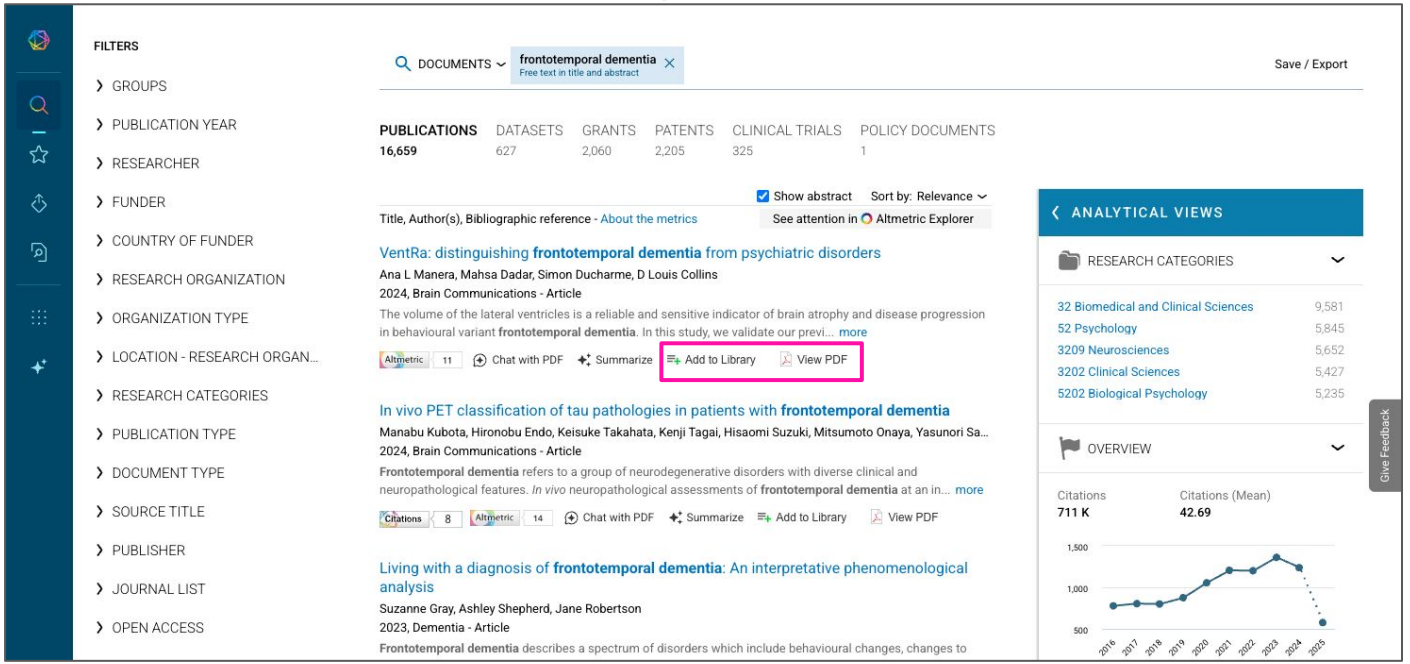


1. On a website with an article, a side panel opens on the left.
2. Choose “Add to Library” to import metadata and PDF (if access available) to your library.
3. Hover over “Add to Library” to select a library and/or list to save to.



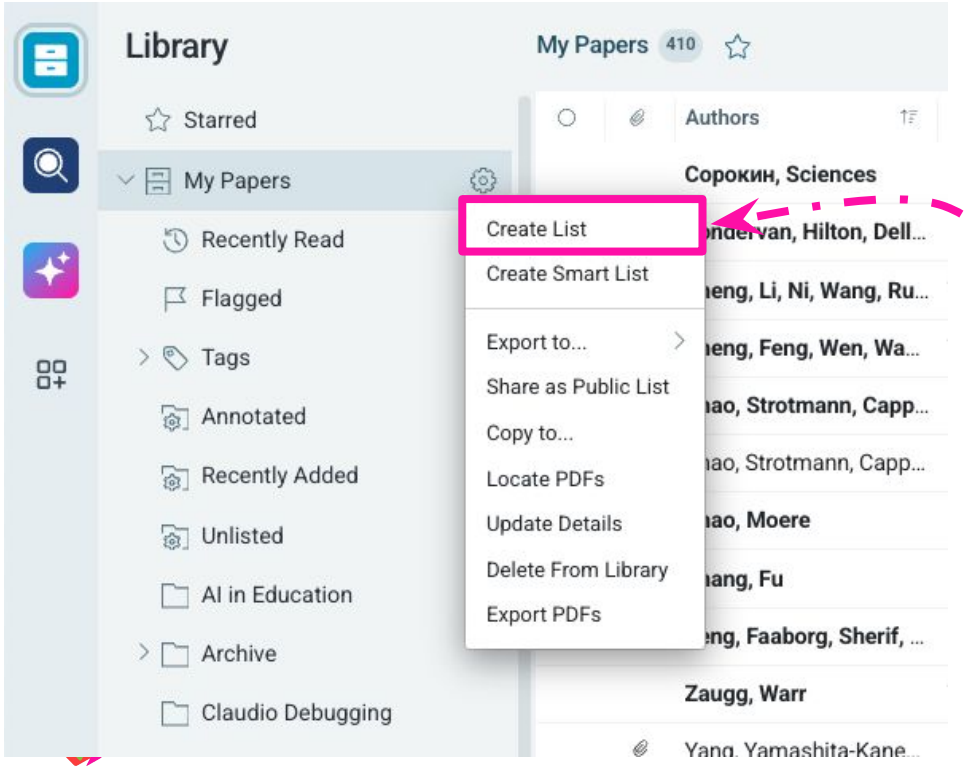
3. Import your first articles including full-text PDFs

Inside a database, the browser extension automatically adds “Add to Library” and “View PDF” next to each record.



Tip: Want to export multiple records? Export using .ris or .bib format to import into Papers. Then choose “Locate PDF” in list menu to automatically find and attach PDFs.

4. Organize Library with Lists & Tags



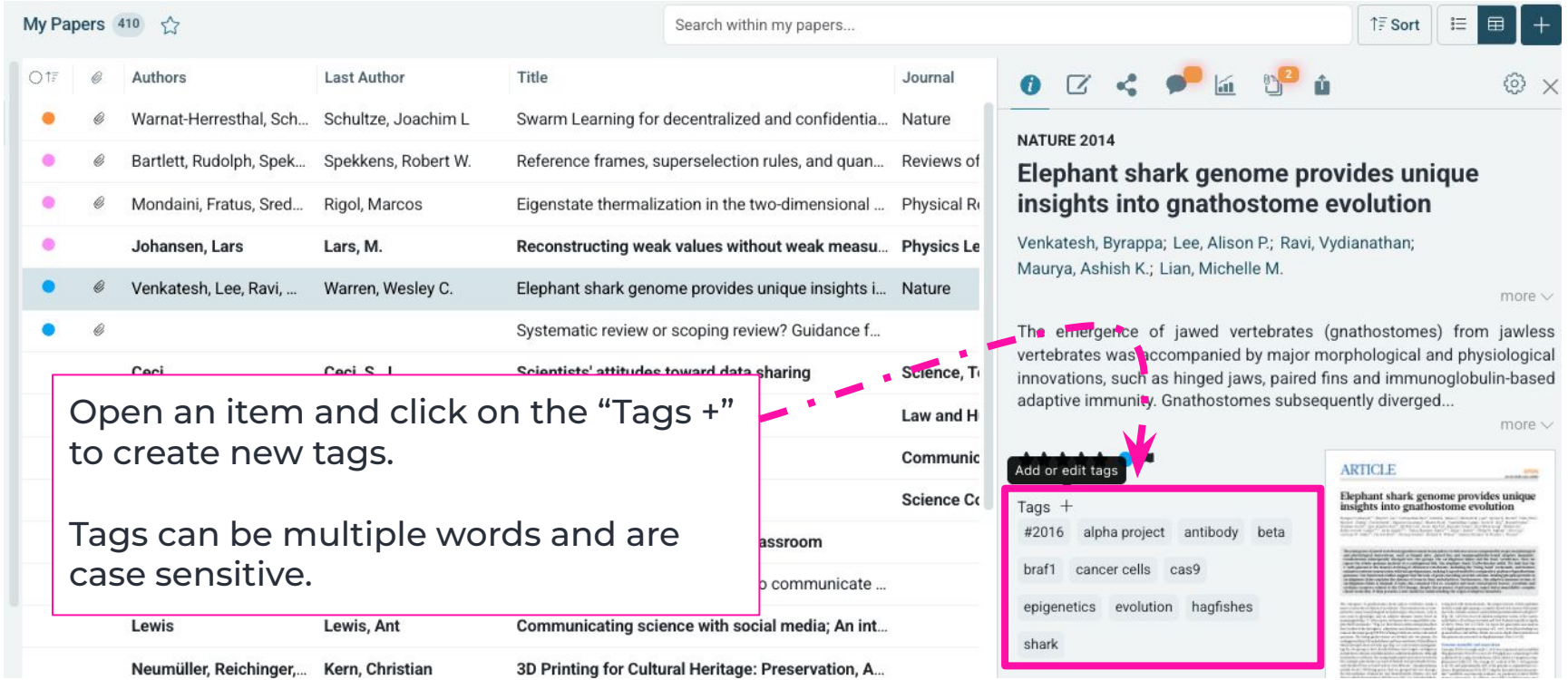
Items can be organized into lists and tagged with keywords that you create.

There is no limit to the items you can save, and lists or tags that you use.

Create a new list by clicking on the cogwheel next to “My Papers”.

You can also create lists within lists. Click on the cogwheel next to a list to create a sublist.

4. Organize Library with Lists & Tags



Open an item and click on the “Tags +” to create new tags.

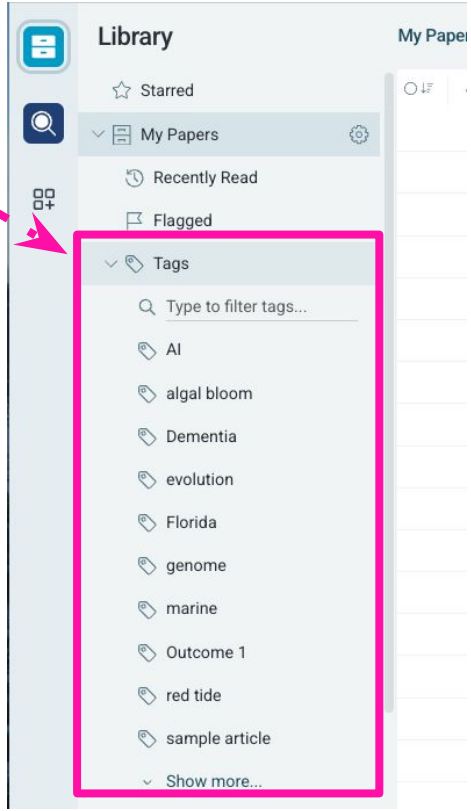
Tags can be multiple words and are case sensitive.

4. Organize Library with Lists & Tags

Find tagged items by expanding the “Tags” list inside your library.

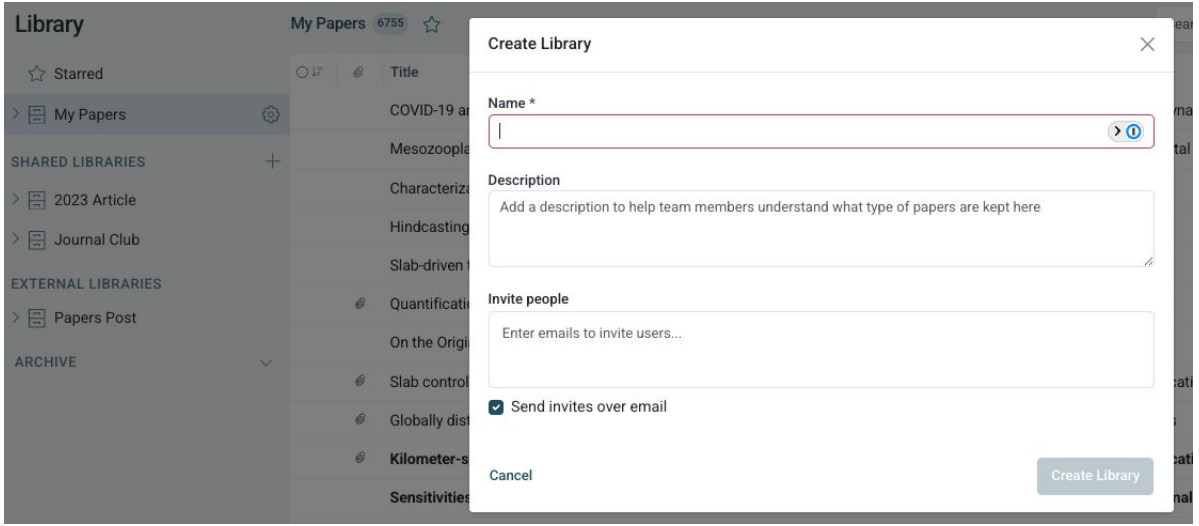
Click on a tag to see all the items with that tag.

To quickly add a tag to an item, drag and drop it to the tag.



5. Create a Shared Library with Collaborators

- Click on + next to “Shared Libraries”
- Give your shared library a title
- Add emails of your collaborators
- Add new or copy items from your library



Essential users can create 5 shared libraries.

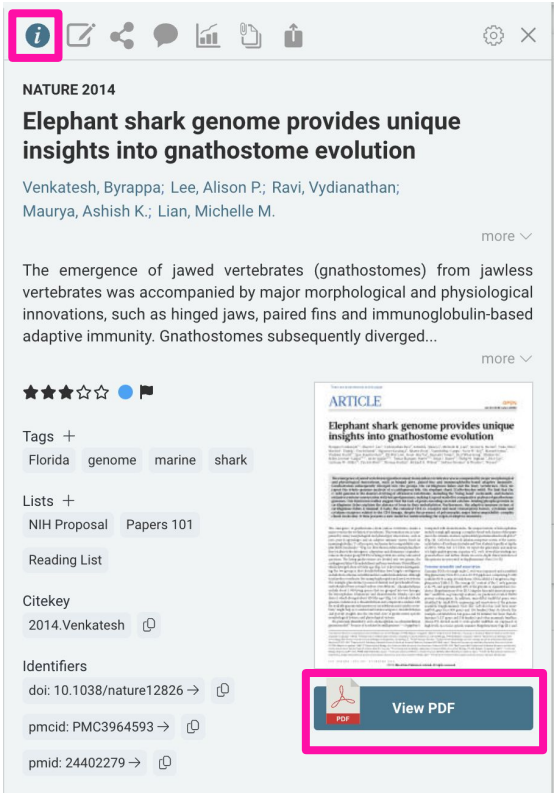
Pro users can create 15 shared libraries and 2 custom fields per shared library.

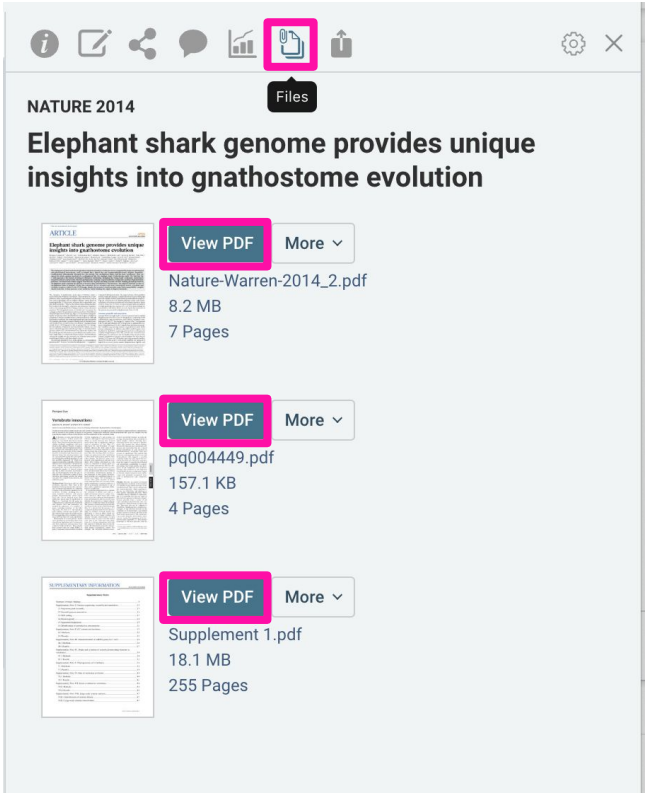
6. Read and Annotate PDFs

Open Details or Files tabs on a specific reference in your library.

Click on “View PDF” to open the PDF viewer in a new window.

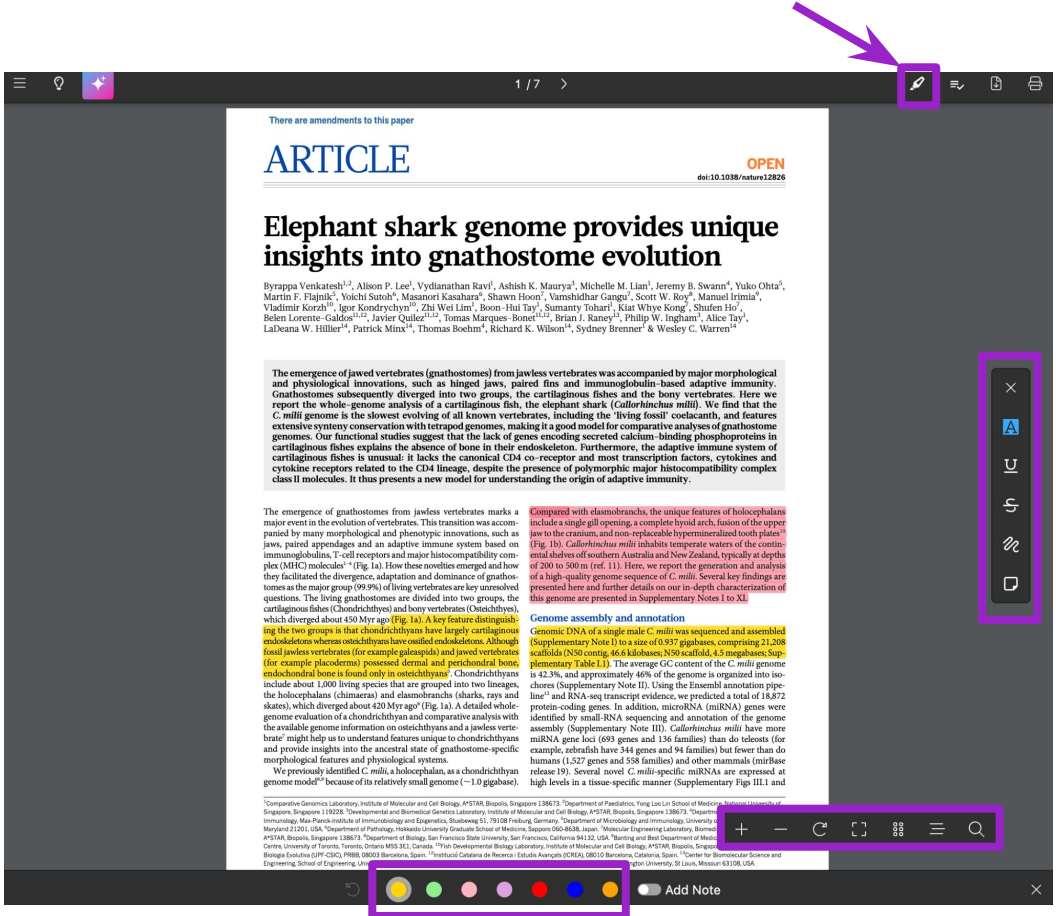
Note: You can also double click the reference in the library view to open the PDF viewer.





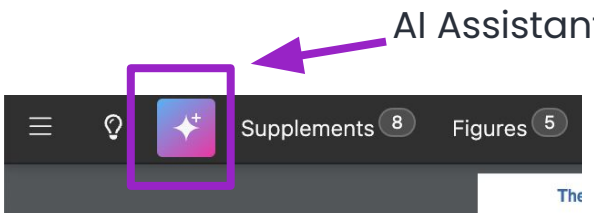
6. Read and Annotate PDFs

- Right click with the mouse to change the page layout
- Use the menu in bottom right to zoom, rotate, search
- To annotate the reference click on the Annotate button in the top right of the screen
- Select the type of annotation in menu that appears on right side
- Choose color in bottom menu

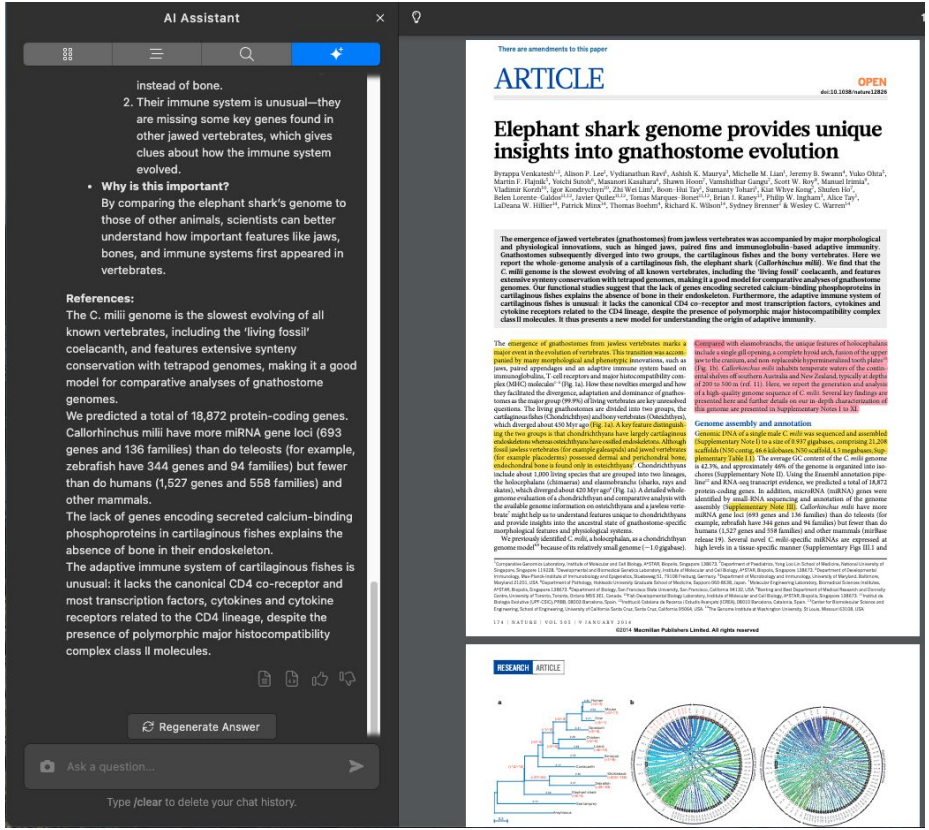


7. Use the AI Assistant to query PDFs and your library

Click on AI button in top left corner of the PDF viewer to open an AI Assistant session.

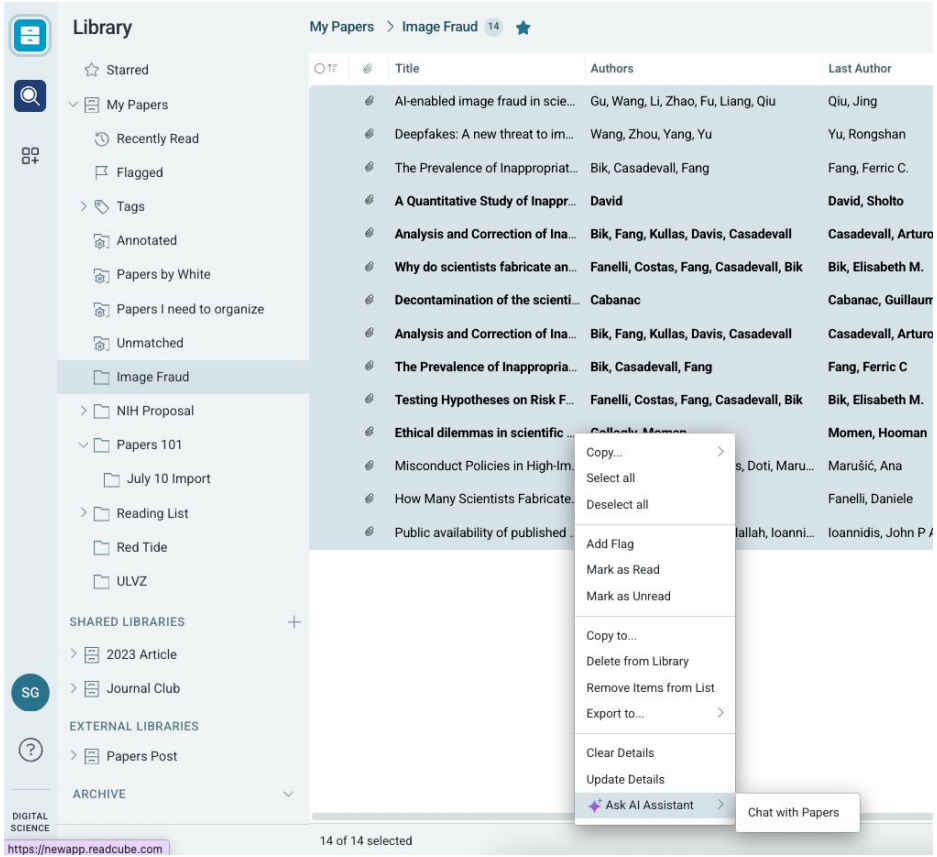


Ask the AI Assistant questions about the PDF and click on the arrows to view the source's location within the article.



Find the AI Assistant in the Papers web and iOS app

7. Use the AI Assistant to query PDFs and your library



Papers Pro Feature!

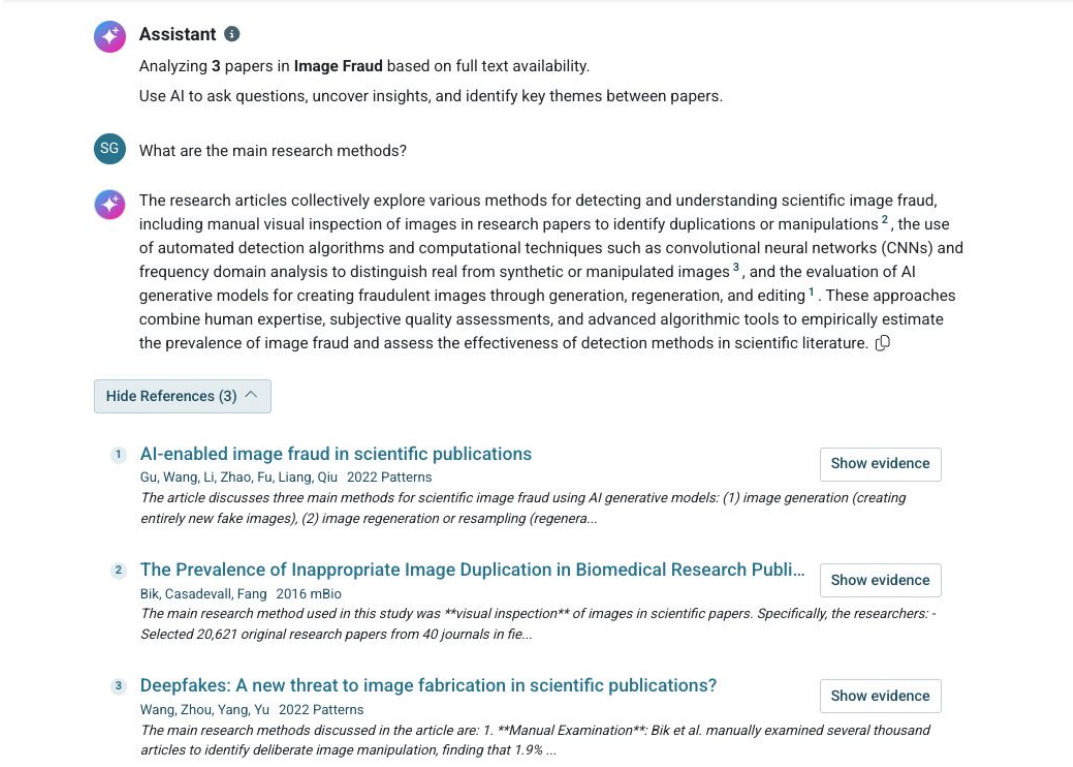
Query sets of up to 20 PDFs using AI Assistant

- Select multiple items with PDFs using shift key + mouse click
- Right click with mouse to open menu
- Choose “Ask AI Assistant - Chat with Papers”

Note: You must have PDFs saved as attachments and be online to ask questions of your library.

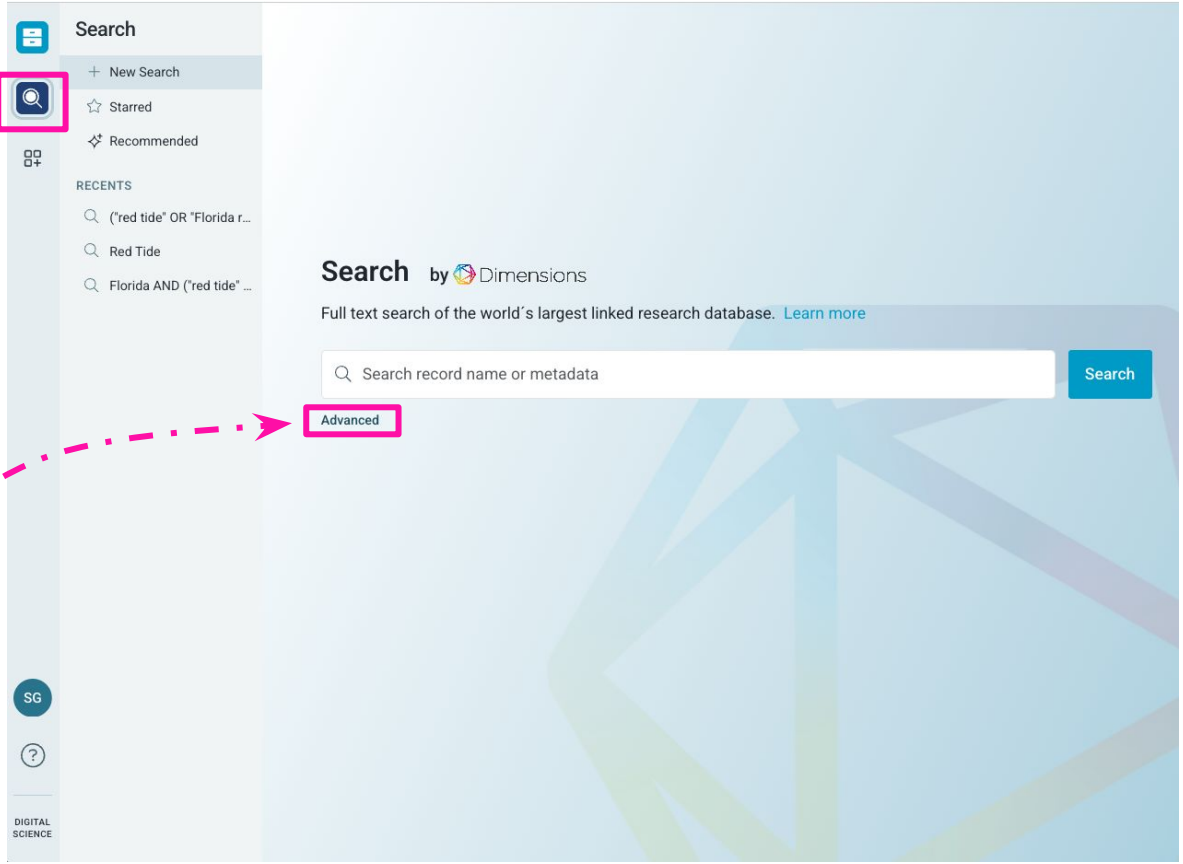
7. Use the AI Assistant to query PDFs and your library

- Ask questions of your article sets. Choose one of the suggestions or ask your own.
- Superscripts in answer refer to articles.
- Click on “Show References” to see article summary.
- “Show Evidence” will open PDF and highlight passages relevant to the answer.



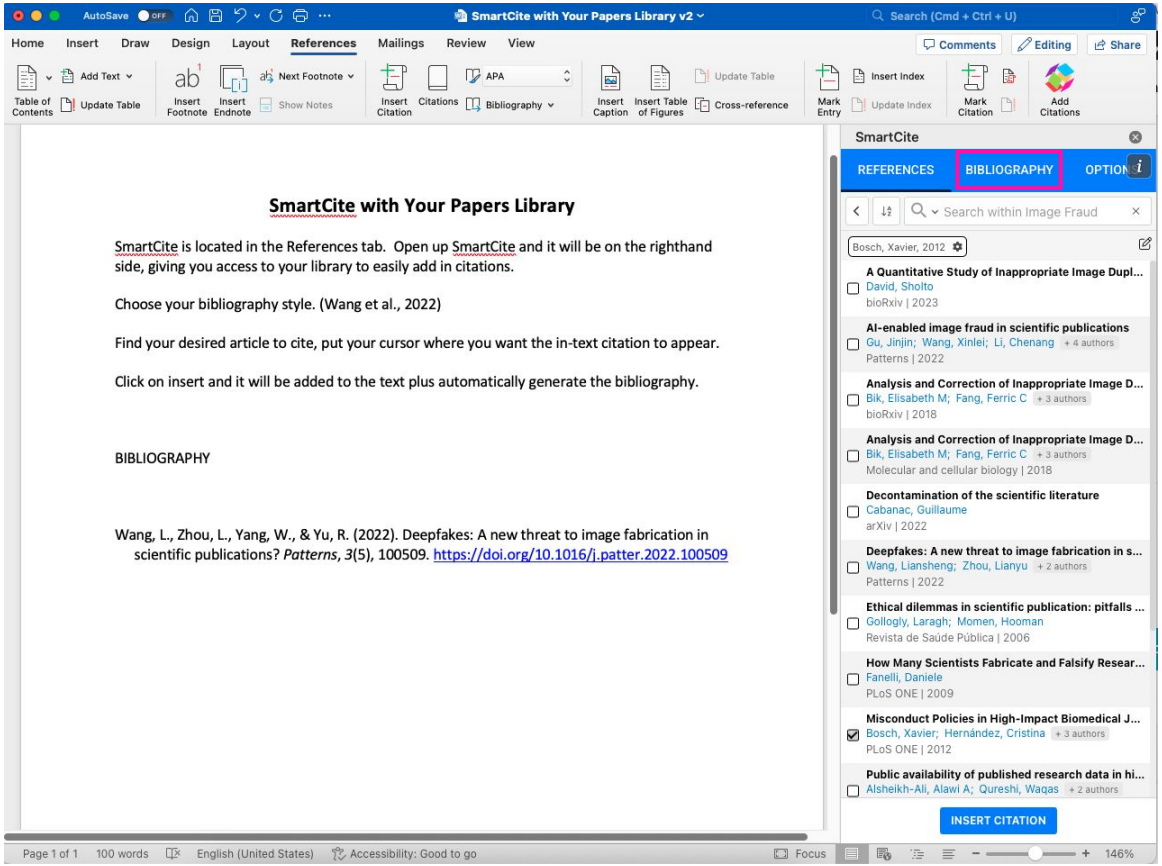
8. Discover new research

- Search for new research using the magnifying glass icon in left menu.
- Search is powered by Dimensions.ai. Learn more about the world's largest linked research database.
- Search using keywords
- Choose "Advanced" for a query builder and AI Assisted search (Pro only).



9. Create bibliographies in Word and Google Docs

- Install SmartCite to connect Papers to Google Docs and Microsoft Word.
- Inside the document, open SmartCite and login.
- Choose the bibliography style.
- Search or browse the items in References to add in-text citation where cursor is placed.
- The bibliography is automatically generated at end of document.



How to get help

- The Papers Support team is available at any time to answer your questions. Submit a ticket.
- Visit the Help Center for detailed feature documents to search or browse.
- Looking for more training? Visit the event calendar and register for a live class.
- Want to watch a video instead? Here is the video library.

Thank you for being a Papers subscriber!