

# Papers Quick Start Guide

Version 3.1



# Welcome to Papers

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

- **Import existing libraries**
- **Match & edit articles**
- **Customize your libraries**
- **Organize your libraries**
- **Search & discover**
- **View articles & share annotations**
- **Sync & store across devices**
- **Use SmartCite**

If you're ever unsure or feeling stuck, please reach out [support@papersapp.com](mailto:support@papersapp.com).



# Library Feature Overview

The screenshot displays the Papers application interface with various features annotated by arrows and labels:

- Sort/Filter**: Points to the top toolbar icons for sorting and filtering.
- Import/Add References**: Points to the 'Add' button in the top toolbar.
- Library Search**: Points to the search input field in the top toolbar.
- Article Info**: Points to the information icon in the article sidebar.
- Edit Metadata**: Points to the edit icon in the article sidebar.
- Share**: Points to the share icon in the article sidebar.
- Notes**: Points to the notes icon in the article sidebar.
- Article Analytics**: Points to the analytics icon in the article sidebar.
- Supplements**: Points to the supplements icon in the article sidebar.
- Export**: Points to the export icon in the article sidebar.
- Built in search engine**: Points to the search input field in the left sidebar.
- Personalized recommendations**: Points to the 'Recommendations' section in the left sidebar.
- Personal Library**: Points to the 'My Papers' section in the left sidebar.
- Shared Libraries**: Points to the 'Shared Libraries' section in the left sidebar.
- Hyperlinked Author Names**: Points to the author names in the article sidebar.
- Advanced Organization**: Points to the star rating and organization icons in the article sidebar.
- Tags**: Points to the 'TAGS' section in the article sidebar.
- Lists**: Points to the 'LISTS' section in the article sidebar.
- View PDF**: Points to the 'View PDF' button in the article sidebar.

The main interface shows a list of papers with columns for Authors, Last Author, Title, and Journal. The selected paper is "Elephant shark genome provides unique insights into gnathostome evolution" by Venkatesh et al. The article preview shows the title, authors, and abstract.



# Enhanced PDF Reader

The image displays a screenshot of an Enhanced PDF Reader interface. The main content is a scientific article titled "shark genome provides unique insights into gnathostome evolution". The interface includes several key features:

- Menu Options:** A blue sidebar on the left contains multiple menu options, including "Menu Options", "Author Details", and "Linked In-line References".
- Highlighted Data & Supplemental Material:** A box on the left side of the article provides author information and links to supplemental materials.
- Page Scroll:** A central navigation bar allows for page scrolling.
- Annotate, Print & Export Options:** A sidebar on the right provides options for annotation, printing, and exporting.
- Annotation Tools:** A bottom toolbar includes tools for Highlight, Underline, Strikethrough, Free Hand, and Sticky Note.
- Document Menu:** A bottom right menu includes options for Zoom, Rotate, Fit Width, Thumbnails, Outline, and Search.

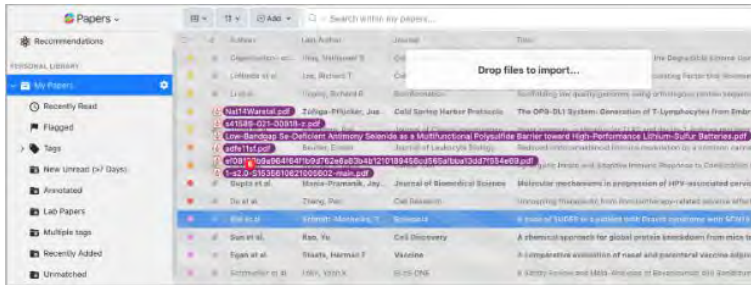
The article text is partially highlighted in yellow, and a red bracket is visible on the right side of the text. The interface is designed to facilitate reading and interaction with scientific documents.



# Multiple Options For Import

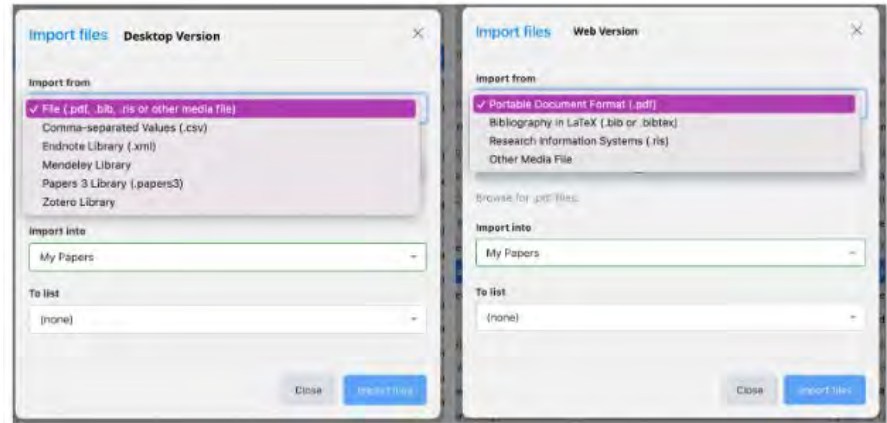
## Option 1: Drag & Drop

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.



# Multiple Options For Import

## Option 3: Other Reference Managers

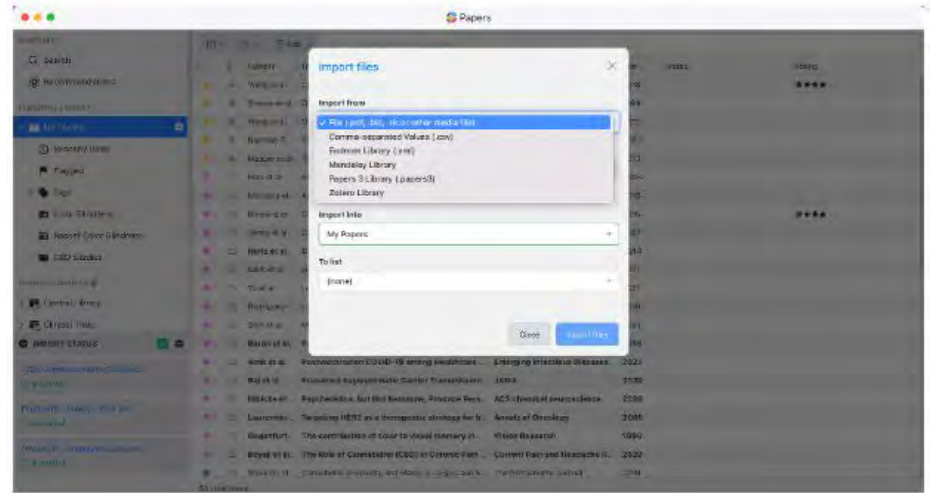
We make switching tools easy. See the dedicated instructions below to bring your library from a previous tool into Papers.

### **EndNote/Zotero/Mendeley**

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

### **Bookends/PaperPile/Refworks/Others**

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



# Metadata Matching

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 different options.

## 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 always more. Try selecting only part of the title to start. Most of that time, that's all you need for a match.



# Editing Metadata

## Edit

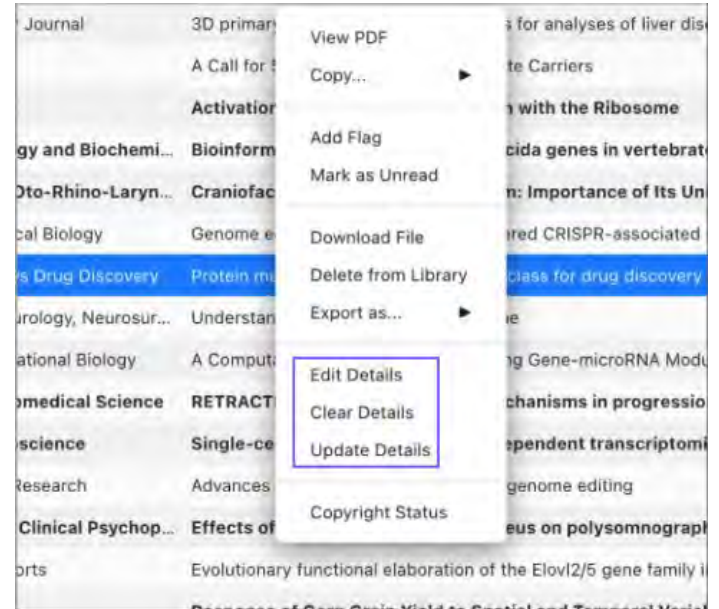
"Edit Details" will bring up the metadata editing pane, including the PDF preview so you can easily copy the fields to populate the reference.

## Clear

"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

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





# Editing Metadata

The screenshot displays the Papers application interface. On the left, a sidebar shows 'PERSONAL LIBRARY' with 'My Papers' selected. The main area shows a list of papers with columns for Authors, Last Author, Title, and Journal. The selected paper is 'Elephant shark genome provides unique insights into gnathostome evolution' by Venkatesh et al. in the journal Nature. A preview of the article is shown below the list. On the right, a detailed view of the article's metadata is displayed, including the title, author list, journal name, DOI, and PMID.

Authors	Last Author	Title	Journal
Lintel et al.	Grossberg, George T.	Mood Disorders and Anxiety in Parkinson's Dis...	Journal of Ge
Leader et al.	Merad, Miriam	Single-cell analysis of human non-small cell lung ...	Cancer Cell
Venkatesh et al.	Warren, Wesley C.	Elephant shark genome provides unique insights i...	Nature
Shao et al.	Sher, Hsuhao	Identification and mechanism of G protein-biased...	Nature Chemi
Tian et al.	Chen, Zhongwei	Low-Bandgap Se-Deficient Antimony Selenide...	Advanced Ma
Ethier et al.	Amir, Eitan	Influence of the competing risk of death on es...	European Jou

**ARTICLE** OPEN  
doi:10.1038/nature12826

## Elephant shark genome provides unique insights into gnathostome evolution

Byrappa Venkatesh<sup>1,2</sup>, Alison P. Lee<sup>3</sup>, Vydiyanathan Ravi<sup>4</sup>, Ashish K. Maurya<sup>5</sup>, Michelle M. Lian<sup>6</sup>, Jeremy B. Swann<sup>6</sup>, Yuko Ohta<sup>4</sup>, Martin F. Flajnik<sup>3</sup>, Yoshiki Saitoh<sup>7</sup>, Masanori Kasahara<sup>8</sup>, Shawn Hoer<sup>9</sup>, Vanshishwar Gangui<sup>10</sup>, Scott W. Rog<sup>11</sup>, Mamed Irimia<sup>12</sup>, Vladimir Korzh<sup>13</sup>, Igor Kondrychyn<sup>14</sup>, Zhi Wei Lim<sup>15</sup>, Soon-Hui Jay<sup>16</sup>, Sumamry Tohart<sup>17</sup>, Kiat Whye Kong<sup>18</sup>, Shuten Ho<sup>19</sup>, Brian Lorenzo-Galdames<sup>20</sup>, Javier Quiles<sup>21</sup>, Thomas Marques-Bonet<sup>22</sup>, Brian J. Rames<sup>23</sup>, Philip W. Ingelman<sup>24</sup>, Alice Jay<sup>25</sup>, LaDeana W. Hilber<sup>26</sup>, Patrick Mink<sup>27</sup>, Thomas Boehm<sup>28</sup>, Richard K. Wilson<sup>29</sup>, Sydney Brenner<sup>30</sup> & Wesley C. Warren<sup>31</sup>

The emergence of jawed vertebrates (gnathostomes) from jawless vertebrates was accompanied by major morphological and physiological innovations, such as hinged jaws, paired fins and immunoglobulin-based adaptive immunity. Gnathostomes subsequently diverged into two groups, the cartilaginous fishes and the bony vertebrates. Here we

**Journal Article**

Elephant shark genome provides unique insights into gnathostome evolution

Author

Byrappa Venkatesh

Alison P. Lee

Vydiyanathan Ravi

Ashish K. Maurya

Michelle M. Lian

Jeremy B. Swann

Yuko Ohta

Martin F. Flajnik

Enter author here

Journal

Nature

DOI

0028-0836

10.1038/nature12826

PMID

24402279

PMC3964593

Enter query (optional)

[See video tutorial for more information.](#)



# Customize Your Library

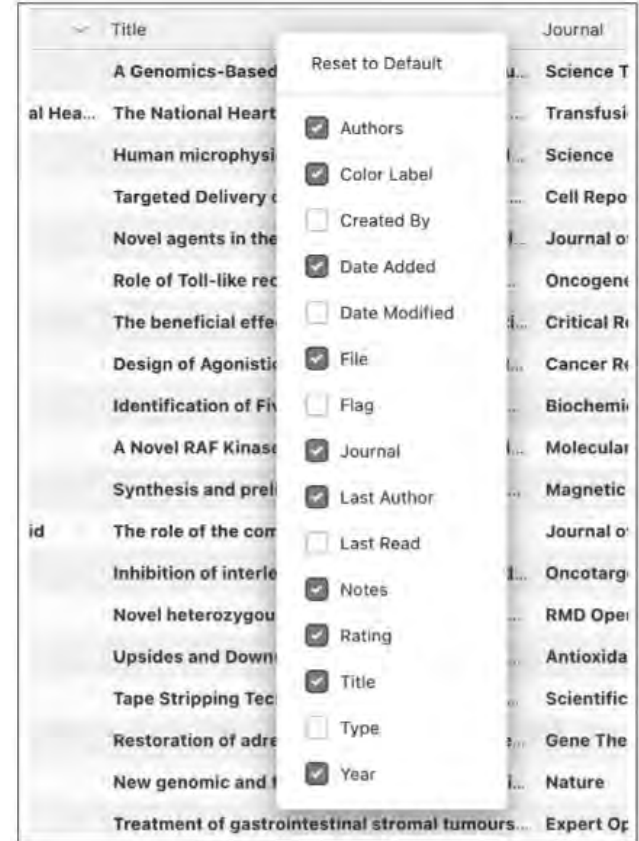
## Table & List Views

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.

[See video tutorial for more information.](#)

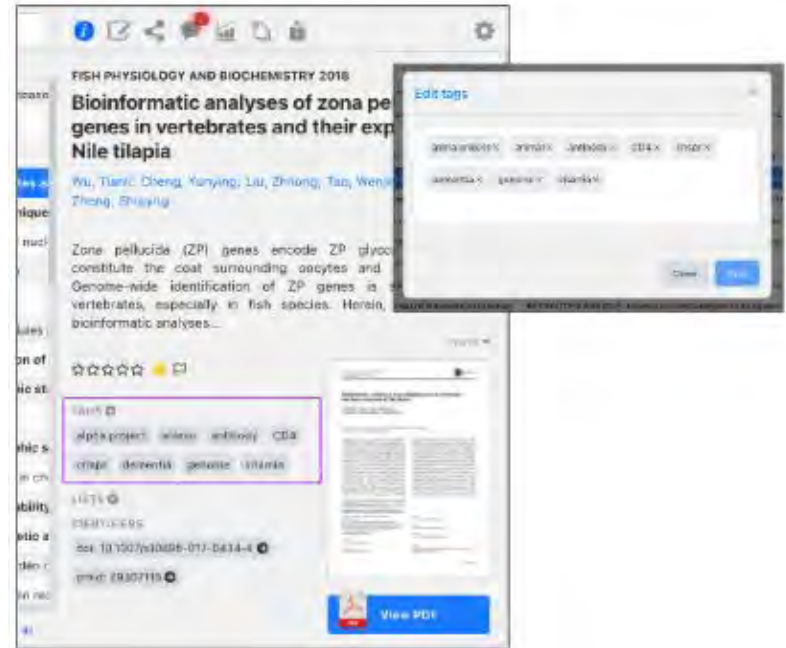


# Ways to Organize Your Libraries

## 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.](#)

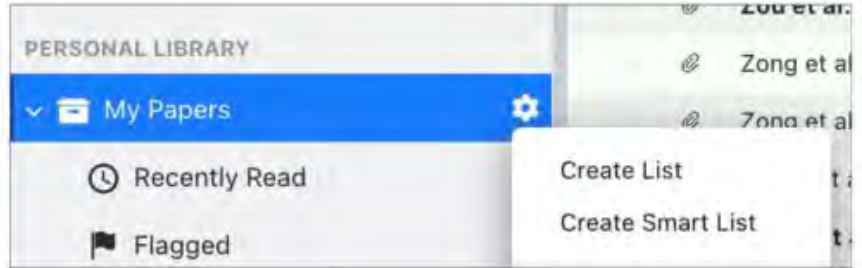


# Ways to Organize Your Libraries

## 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.](#)



# Ways to Organize Your Libraries

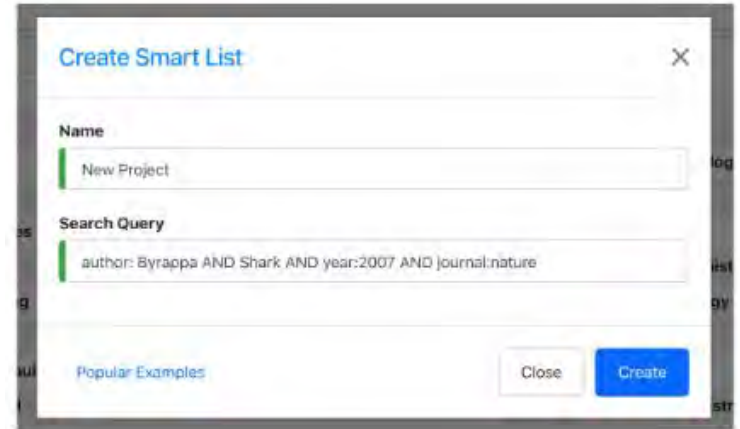
## Smart Lists

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.



The screenshot shows a 'Create Smart List' dialog box with a close button (X) in the top right corner. It contains two input fields: 'Name' with the text 'New Project' and 'Search Query' with the text 'author: Byrappa AND Shark AND year:2007 AND journal:nature'. At the bottom left, there is a link for 'Popular Examples'. At the bottom right, there are two buttons: 'Close' and 'Create'.

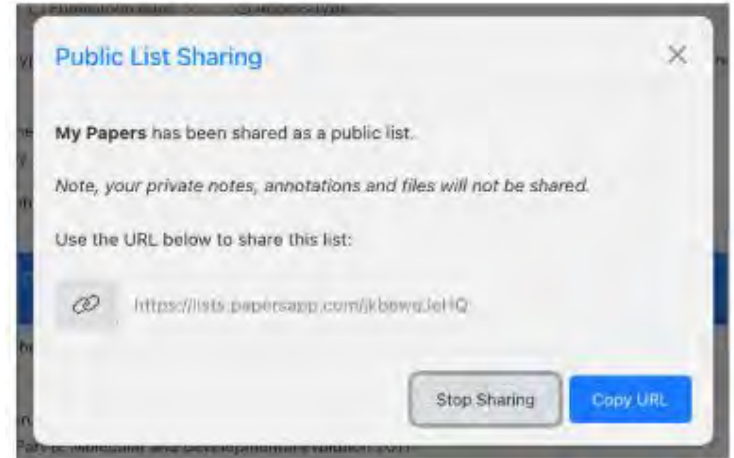


# Ways to Organize Your Libraries

## 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 Capabilities

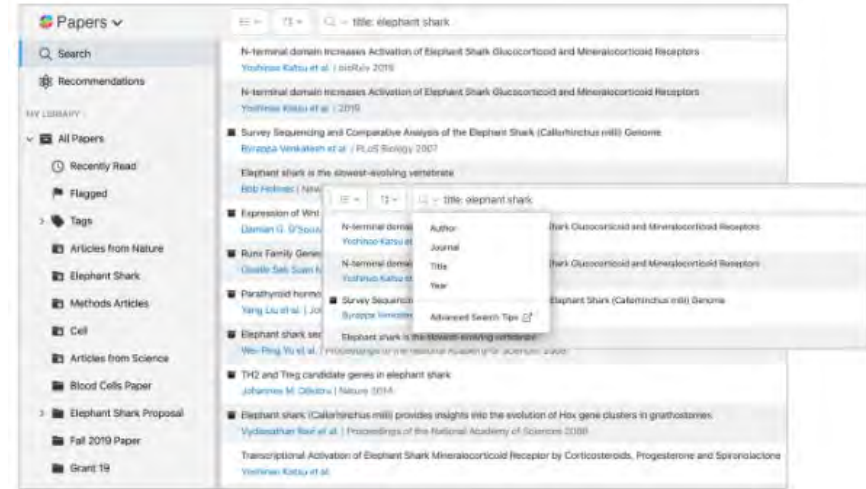
## Built in Search

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.

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

Learn more about our advanced search filters here:

[Advanced and Syntax Searching](#)



# Browser Extensions

## Built in Search

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](#)



[Firefox](#)



[Microsoft](#)



[Safari](#)

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

[See video tutorial for more information.](#)





NIH National Library of Medicine  
National Center for Biotechnology Information

PubMed.gov

elephant shark genome

Advanced Create alert Create RSS

Save Email Send to

Sorted by: Best match Display options

MY NCBI FILTERS

99 results Page 1 of 10

RESULTS BY YEAR

100% AVAILABILITY

Abstract

Free full text

Full text

1 **Author Correction: Elephant shark genome provides unique insights into gnathostome evolution.**

Venkatesh B, Lee AP, Ravi V, Maurya AK, Lian MM, Swain JB, Ohta Y, Fajnik MF, Sush Y, Kasahara M, Hoon S, Gangu V, Roy SW, Irimia M, Korzh V, Kondryczyn I, Lim ZW, Tay BH, Tehari S, Kong KW, Ho S, Lorenzo-Galindo B, Quilez J, Marques-Bonet T, Raney BJ, Ingtam PW, Tay A, Hiller LW, Minz P, Boehm T, Wilson RK, Brenner S, Warren WC.

Nature. 2020 Dec;588(7837):616. doi: 10.1038/s41586-020-2967-4.

PMID: 33214712 [Free PMC article](#) [in Library](#) [View PDF](#)

2 **Elephant shark genome provides unique insights into gnathostome evolution.**

Venkatesh B, Lee AP, Ravi V, Maurya AK, Lian MM, Swain JB, Ohta Y, Fajnik MF, Sush Y, Kasahara M, Hoon S, Gangu V, Roy SW, Irimia M, Korzh V, Kondryczyn I, Lim ZW, Tay BH, Tehari S, Kong KW, Ho S, Lorenzo-Galindo B, Quilez J, Marques-Bonet T, Raney BJ, Ingtam PW, Tay A, Hiller LW, Minz P,

pubmed.ncbi.nlm.nih.gov/?term=elephant+shark+genome

NIH National Library of Medicine  
National Center for Biotechnology Information

PubMed.gov

elephant shark genome

Advanced Create alert Create RSS

Save Email Send to

Sorted by: Best match Display options

MY NCBI FILTERS

99 results Page 1 of 10

RESULTS BY YEAR

100% AVAILABILITY

Abstract

Free full text

Full text

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Venkatesh B, Lee AP, Ravi V, Maurya AK, Lian MM, Swain JB, Ohta Y, Fajnik MF, Sush Y, Kasahara M, Hoon S, Gangu V, Roy SW, Irimia M, Korzh V, Kondryczyn I, Lim ZW, Tay BH, Tehari S, Kong KW, Ho S, Lorenzo-Galindo B, Quilez J, Marques-Bonet T, Raney BJ, Ingtam PW, Tay A, Hiller LW, Minz P, Boehm T, Wilson RK, Brenner S, Warren WC.

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PMID: 33214712 [Free PMC article](#) [in Library](#) [View PDF](#)

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SCIENTIFIC AMERICAN THE KAVLI PRIZE

# Revealing the Genes that Shape the Human Brain

Researcher Christopher Walsh discovered genes that direct cortical cortex development. He asked how and why they recombined, and the nature of being human?

f t

Search:

Title:

URL:

Note:

[My Papers](#)
[Add to library](#)

**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.

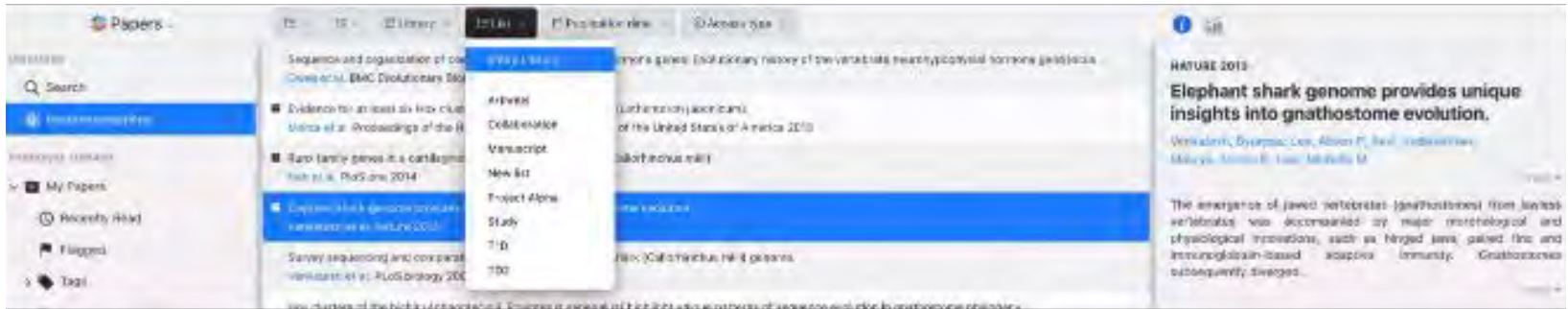


# Personalized Recommendations

## Full Text Search

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.

Learn more about our [advanced search and syntax filters](#) and [watch our video tutorial](#).



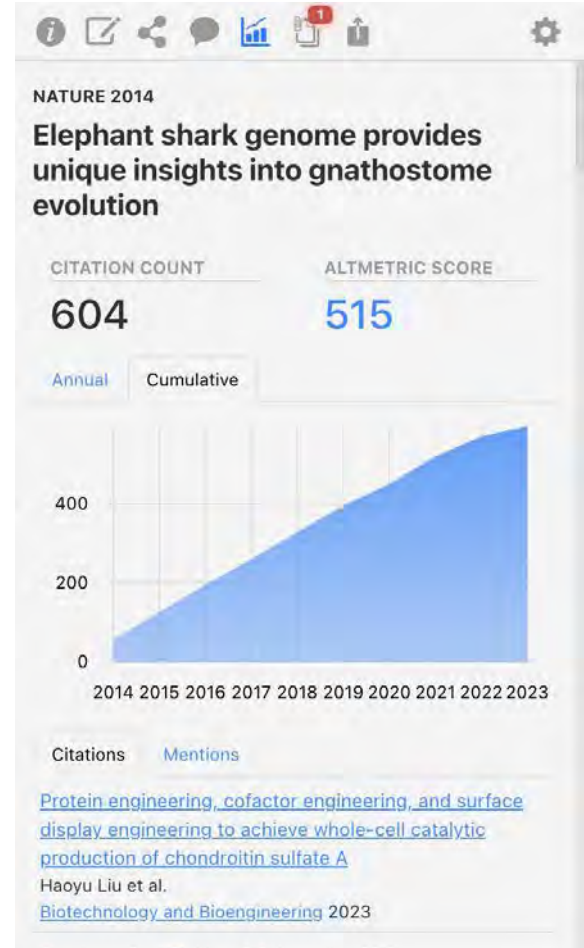
# Mention Monitoring

## Contextual Citations

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.

[See video tutorial for more information.](#)

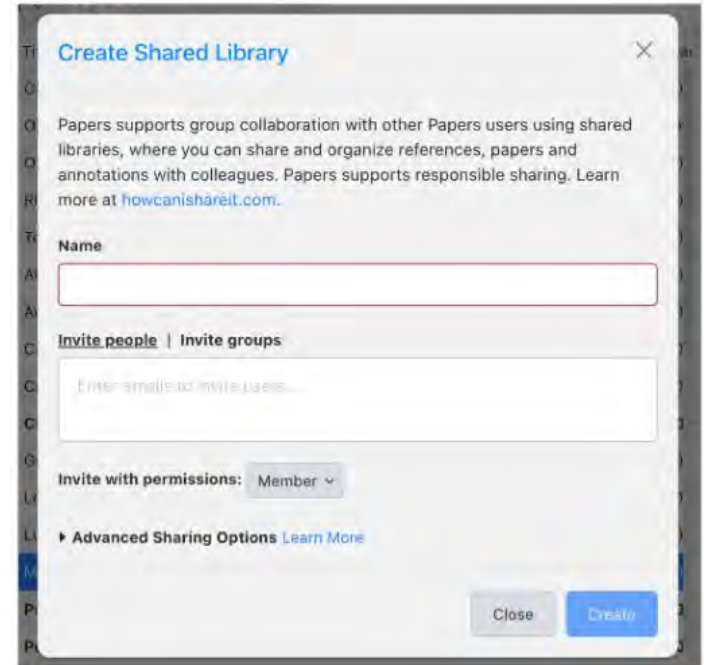


# Flexible Team Spaces

In addition to individual library management, flexible team spaces enable you to share references, PDFs, and annotations between colleagues.

## 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.



The screenshot shows a dialog box titled "Create Shared Library" with a close button (X) in the top right corner. The main text explains that Papers supports group collaboration with other users using shared libraries for sharing references, papers, and annotations. It includes a link to [howcanishareit.com](http://howcanishareit.com). Below this is a "Name" label followed by an empty text input field. There are two options: "Invite people" (selected) and "Invite groups". Under "Invite people", there is a text input field with the placeholder "Enter email(s) to invite users...". Below that is a "permissions" section with the label "Invite with permissions:" and a dropdown menu currently set to "Member". At the bottom left, there is a link for "Advanced Sharing Options" with a "Learn More" link. At the bottom right, there are two buttons: "Close" and "Create".



# Flexible Team Spaces

## 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.

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.**

## Sharing Between Libraries

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

**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**



# Access From Anywhere

## Multi Device Syncing

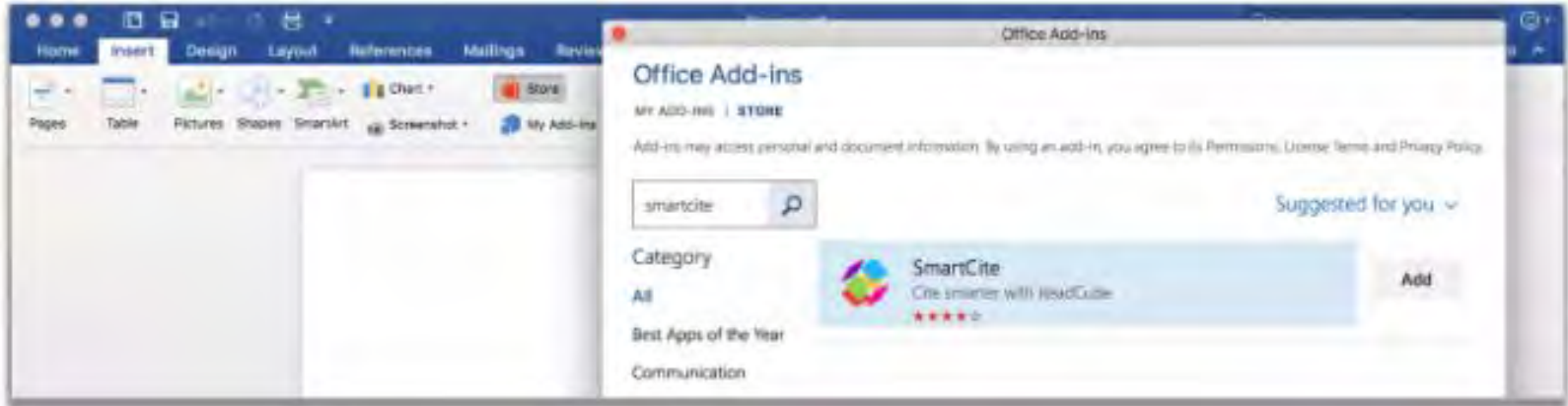
With unlimited secure cloud storage for both personal and shared library collections, Papers allows you to access references and PDFs (including notes and highlights) as well as all the powerful discovery features from any device. ReadCube offers a web app (available on all modern browsers) as well as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



# Downloads

## SmartCite Options

Available in [Word](#), [Google Docs](#) and [CiteKeys](#).



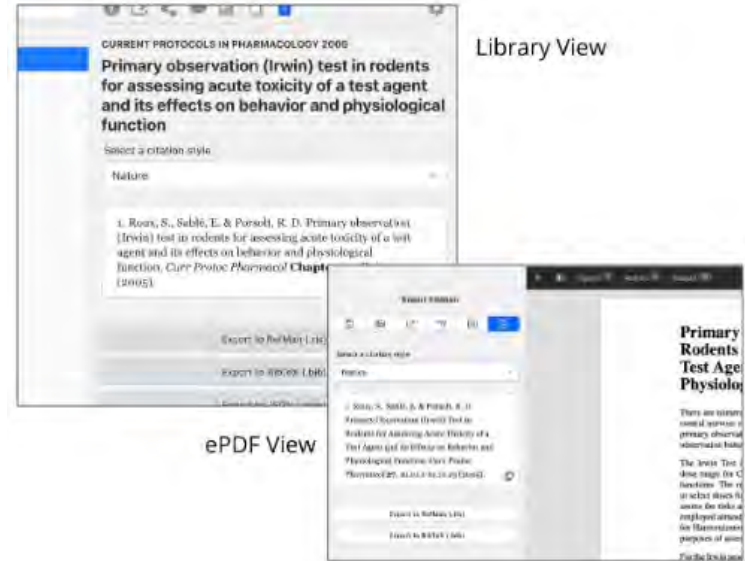


# Citing

## 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)



# Citing

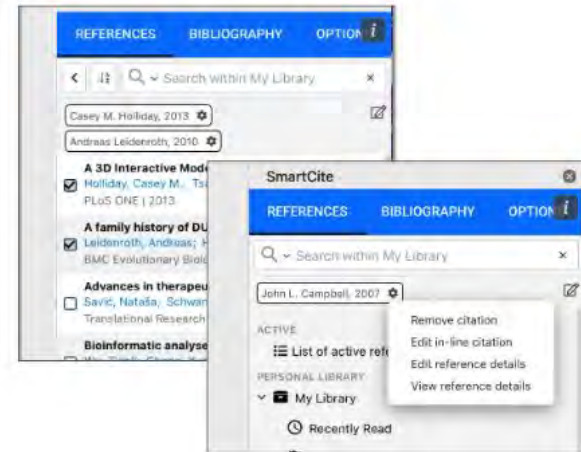
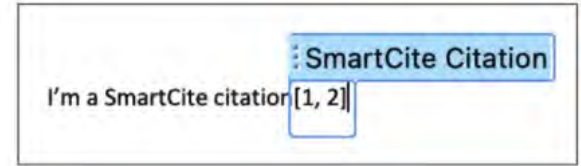
## Start Citing

You can search your library or click on a list or tag to browse through the various folders. The search within SmartCite offers the 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.



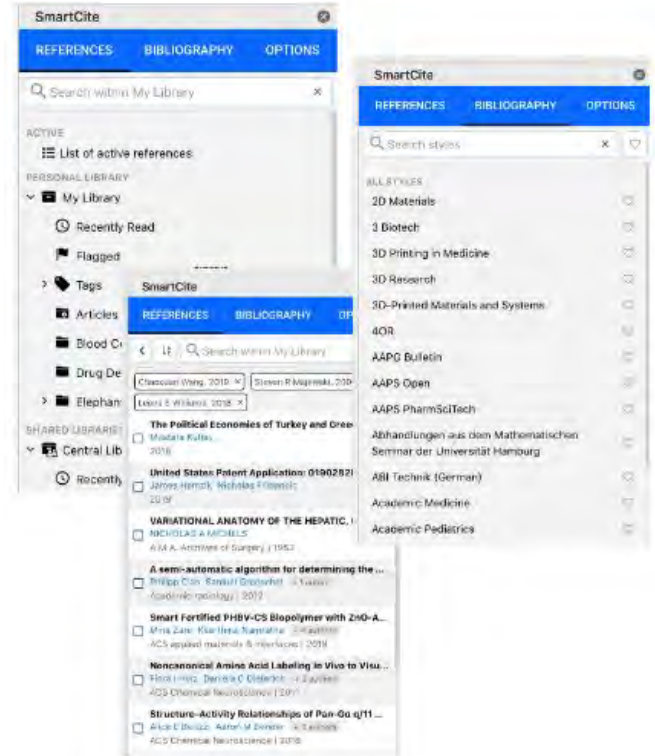
# Citing

## 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".

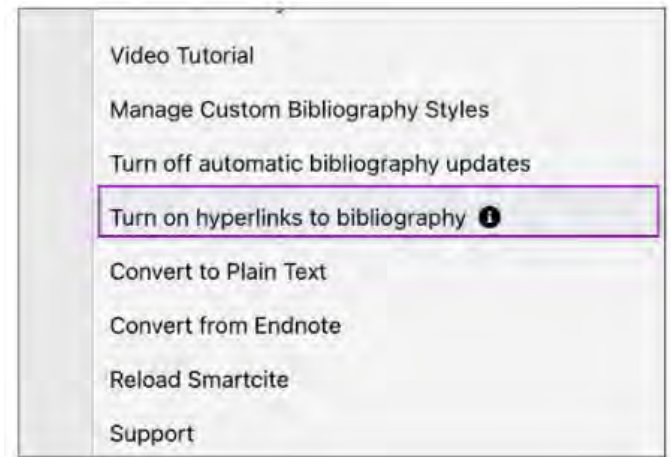


# Citing

## 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.



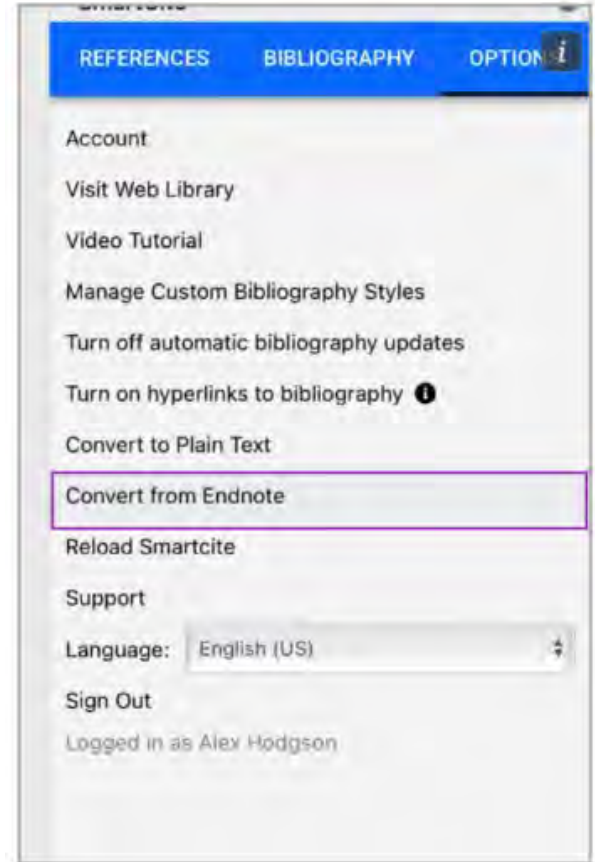
# Citing

## Endnote Citation Converter\*

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.

\* Only available in Word.



# Learn More

To ensure you feel comfortable and confident in ReadCube, our support team is available at any time to answer your questions. [Submit a ticket.](#)

Looking for more training? Our team regularly schedules 101 trainings. [Find a time that works for you](#) and bring your questions!

