

Getting Started with SmartCite

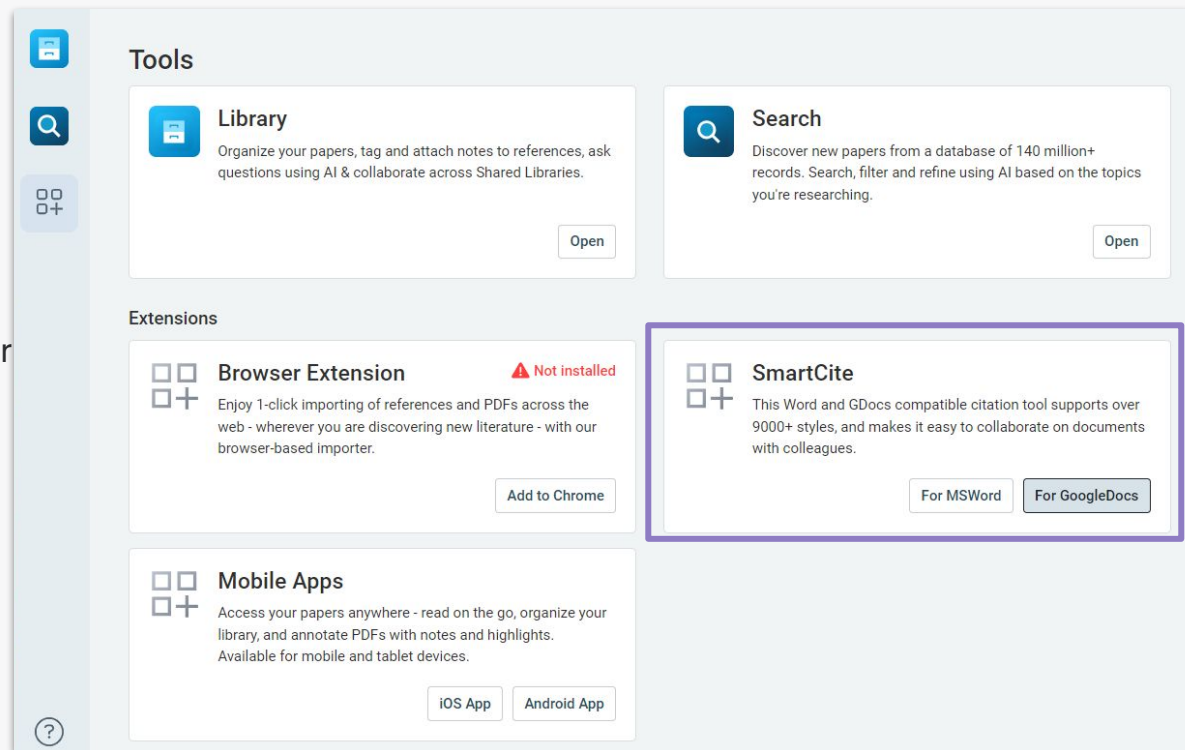
CITATION WRITING USER GUIDE / SEPTEMBER 2024

SmartCite

SmartCite is fast, easy-to-use, supports over 10,000+ styles and makes it easy to collaborate on documents with colleagues.

Visit the Tools menu to access instructions for installing SmartCite for [Word](#) & [Google Docs](#).

Please see this [quick video tutorial](#) within Word!



SmartCite

Select Bibliography Style

Select from 10,000+ existing styles

- Click on the Bibliography tab
- Search or browser for your desired style
- Select style and click Update Bibliography
- Click on the heart icon next to the style to Add to Favorites
- Click on Heart menu item to access favorites list

Add a custom style

- Edit existing CSL file or create a new one *Note: citationstyles.org is one commonly used style editor that is available, but you can use any preferred tool*
- Navigate to the Options > Manage Custom Bibliography Styles and click on the 'Upload Style' button to attach your custom .CSL file
- Custom style will now be available to select from your style menu
- Style can be removed from the Options tab simply by clicking on the X next to the style under Uploaded Styles

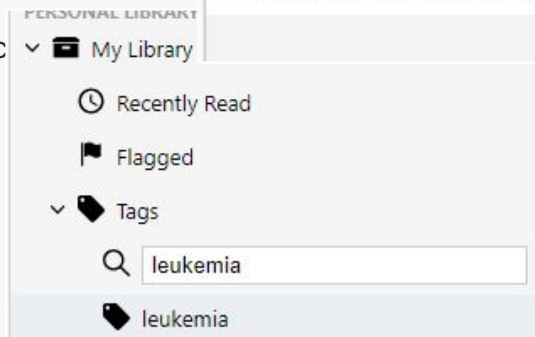
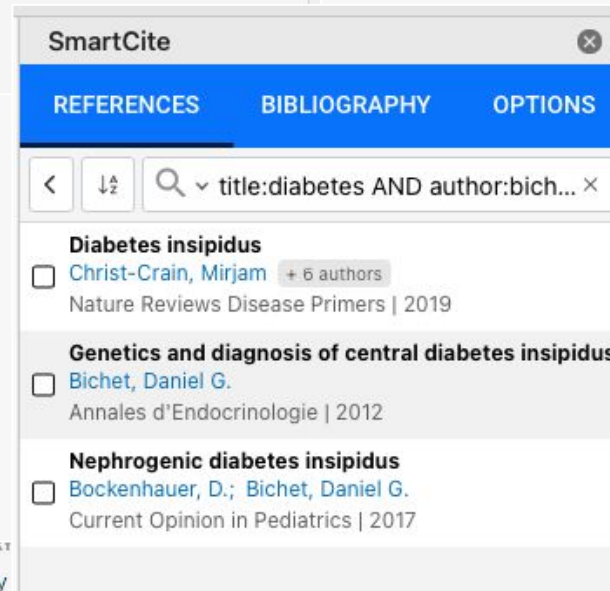
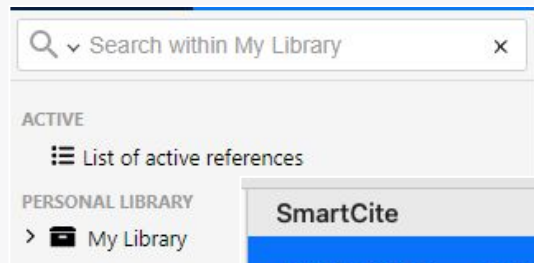
The screenshot displays the SmartCite application interface. At the top, there are three tabs: REFERENCES, BIBLIOGRAPHY (which is selected), and OPTIONS. Below the tabs is a search bar with the text 'Search styles'. A list of styles is shown, categorized into 'CUSTOM STYLES' and 'ALL STYLES'. Under 'CUSTOM STYLES', there is a style named 'Contoso TEST style' with a heart icon next to it. Under 'ALL STYLES', there are several styles listed, including '2D Materials', '3 Biotech', '3D Printing and Additive Manufacturing', 'medicine', 'Materials and Systems', 'Nature', 'Nature (no "et al.")', 'Nature (no superscript)', 'Nature Biotechnology', 'Nature Cell Biology', 'Nature Chemical Biology', 'Tech', 'us dem Mathematischen versität Hamburg', 'utsch)', 'ine', and 'Academic Pediatrics'. Each style has a heart icon next to it. At the bottom of the interface, it says 'SELECTED STYLE: Contoso TEST style' and there is a blue button labeled 'UPDATE BIBLIOGRAPHY'.

SmartCite

Locate References

References tab

1. Locate by searching
 - Upon launching the tool the search will default to My Library
 - If you'd like to search another library, simply select it, then you'll see that library name in the search bar. Next enter your search term(s)
2. Locate by tags that have been applied
 - Locate the tags menu under your library and expand the menu
 - Filter or browse for your desired tag
 - Click on the tag of interest to access all references in the library with that tag
3. Locate by a specific List or SmartList in the library and click on the list to see all references
4. Search for a reference on the web
 - Click on the  icon in the search bar to switch to web search. The icon will now show appear as , indicating the web search has been turned on
 - Enter your search term and use field prompts to narrow results
 - **Tip!** Click on the  again to revert back to Library search



SmartCite

Add References

Position cursor in the document where you want to insert the inline reference.

Select reference(s) and click 'Insert Citation' to insert your reference as an inline citation and add to Bibliography.

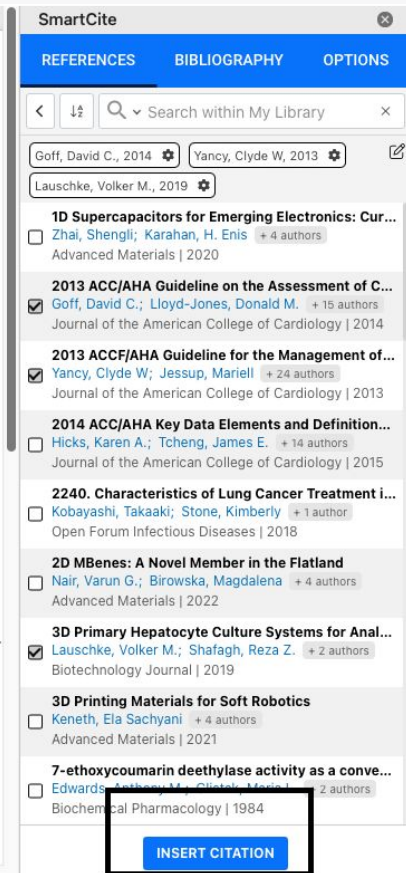
If you're entering multiple references, you can rearrange the order by dragging & dropping the citations

Tip! When collaborating with colleagues on a document, please ensure you're working out of the same shared library to avoid duplicate citations within the bibliography.

SmartCite is fast, easy to use, supports over 10,000+ styles, and most importantly, makes it easy to collaborate on documents with colleagues.

SmartCite makes citing my papers a breeze!

Bibliography



SmartCite

REFERENCES BIBLIOGRAPHY OPTIONS

< ↕ 🔍 Search within My Library ×

Goff, David C., 2014 Yancy, Clyde W, 2013 Lauschke, Volker M., 2019

1D Supercapacitors for Emerging Electronics: Cur...
☐ Zhai, Shengli; Karahan, H. Enis + 4 authors
 Advanced Materials | 2020

2013 ACC/AHA Guideline on the Assessment of C...
☒ Goff, David C.; Lloyd-Jones, Donald M. + 15 authors
 Journal of the American College of Cardiology | 2014

2013 ACCF/AHA Guideline for the Management of...
☒ Yancy, Clyde W; Jessup, Mariell + 24 authors
 Journal of the American College of Cardiology | 2013

2014 ACC/AHA Key Data Elements and Definition...
☐ Hicks, Karen A.; Tchong, James E. + 14 authors
 Journal of the American College of Cardiology | 2015

2240. Characteristics of Lung Cancer Treatment i...
☐ Kobayashi, Takaaki; Stone, Kimberly + 1 author
 Open Forum Infectious Diseases | 2018

2D MBenes: A Novel Member in the Flatland
☐ Nair, Varun G.; Birowska, Magdalena + 4 authors
 Advanced Materials | 2022

3D Primary Hepatocyte Culture Systems for Anal...
☒ Lauschke, Volker M.; Shafagh, Reza Z. + 2 authors
 Biotechnology Journal | 2019

3D Printing Materials for Soft Robotics
☐ Keneth, Ela Sachyani + 4 authors
 Advanced Materials | 2021

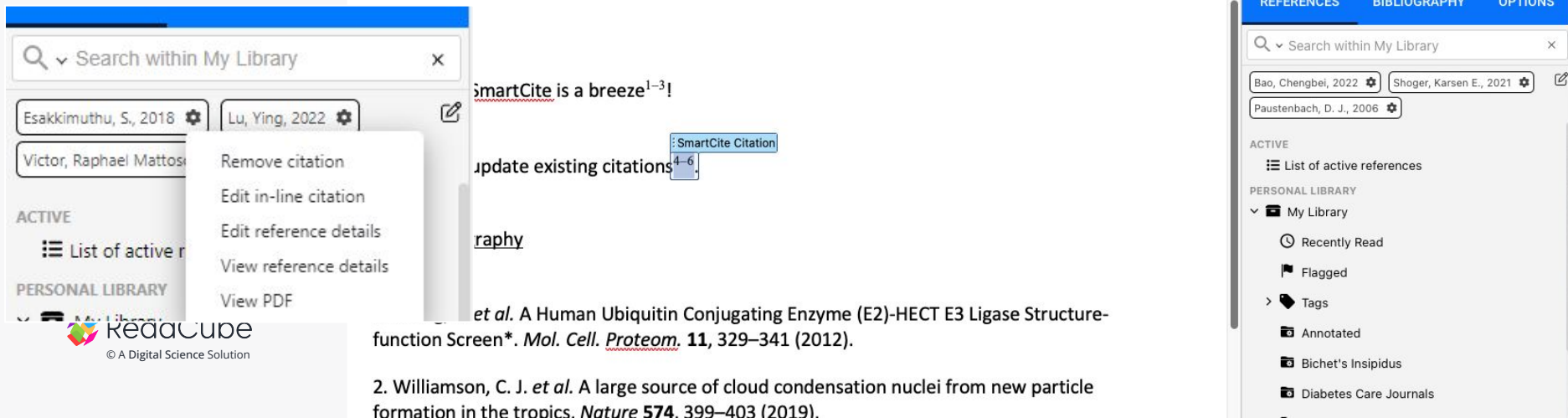
7-ethoxycoumarin deethylase activity as a conve...
☐ Edwards, Anthony M.; Clift, Mark + 2 authors
 Biochemical Pharmacology | 1984

INSERT CITATION

SmartCite

Update References

- To edit a reference(s) that you previously inserted, simply click on the inline citation which will trigger the reference(s) to be selected & allow for editing
- Selected reference(s) will appear under the search bar on the References tab
- Click on the  icon for the reference to reveal edit options.
 - Remove citation: removes the reference from your inline citation and bibliography
 - Edit in-line citation: allows you to make changes to the inline reference that will apply only in this document
 - Edit reference details: opens the reference in your ReadCube library in Edit mode where you can update the details for the record in the library
 - View reference details: opens the reference in your ReadCube library on the Details tab where you can view the reference information
 - View PDF: opens the PDF attached to the reference from your ReadCube library *Note: This option only appears for references that have the PDF attached to the record in ReadCube*
- Once you've made the edits, click 'Update Citation' to apply the changes



The screenshot displays the SmartCite interface with the 'REFERENCES' tab selected. A search bar at the top allows users to 'Search within My Library'. Below the search bar, a list of references is shown, including 'Esakkimuthu, S., 2018', 'Lu, Ying, 2022', 'Victor, Raphael Mattos', 'Bao, Chengbei, 2022', 'Shoger, Karsen E., 2021', and 'Paustenbach, D. J., 2006'. A context menu is open over the 'Lu, Ying, 2022' citation, offering options: 'Remove citation', 'Edit in-line citation', 'Edit reference details', 'View reference details', and 'View PDF'. The main text area shows an inline citation 'SmartCite is a breeze¹⁻³!' with a 'SmartCite Citation' tooltip. Below this, a section titled 'update existing citations' is visible. The bottom of the interface features the ReadCube logo and the text '© A Digital Science Solution'.

SmartCite

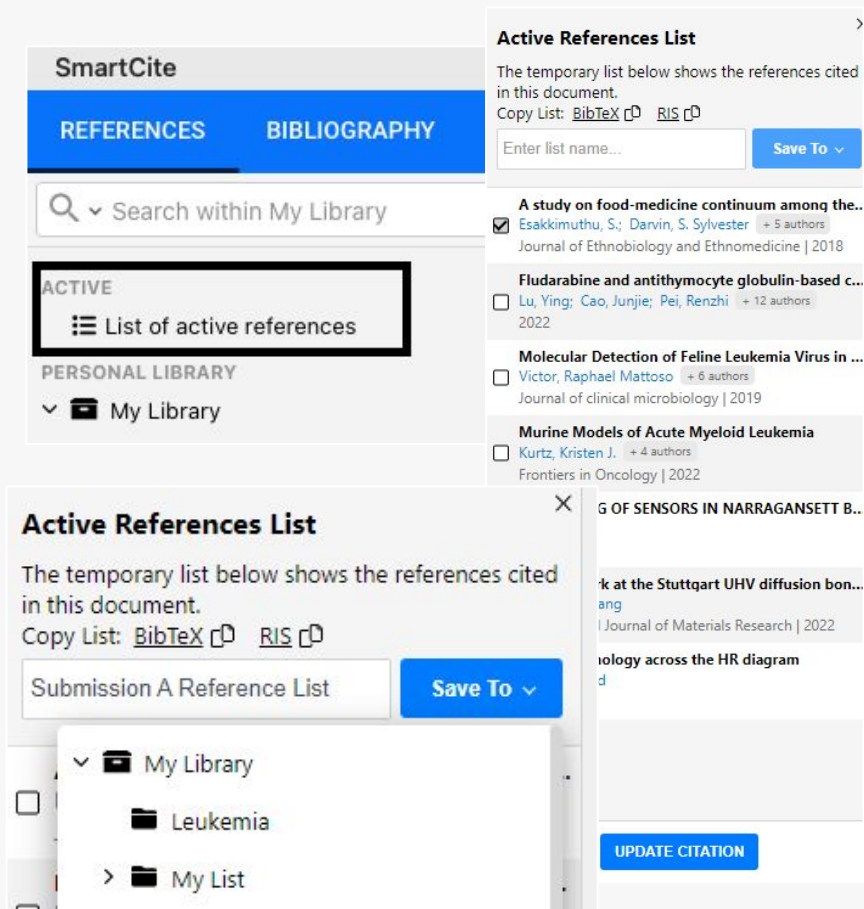
List of Active References

Cite from List of Active References

- Once a reference has been inserted in your document, it will appear in the SmartCite 'List of Active References'
- Position your cursor where you'd like to cite, select the reference(s) from the Active References List, and click Update Citation to insert
- *Tip: Citing from the List of Active References can help avoid duplicate references by ensuring the reference is always pulled from the same library*

Save your List of Active References outside of SmartCite

- Save the List of Active References to a ReadCube Library as a List
- Copy & Paste the list of references into a notepad or document in .bib or .ris format



The screenshot displays the SmartCite interface. At the top, there are tabs for 'REFERENCES' and 'BIBLIOGRAPHY'. Below these is a search bar labeled 'Search within My Library'. A section titled 'ACTIVE' contains a box labeled 'List of active references'. Below this is a 'PERSONAL LIBRARY' section with a dropdown menu showing 'My Library'. On the right side, there is a panel titled 'Active References List' which contains a temporary list of references cited in the document. This panel includes a 'Copy List' button with options for 'BibTeX' and 'RIS', a text input field for 'Enter list name...', and a 'Save To' button. Below the list, there is a 'Submission A Reference List' button and another 'Save To' button. A dropdown menu is open, showing a hierarchy of libraries: 'My Library' (expanded), 'Leukemia', and 'My List'. The 'Active References List' panel also includes a list of references with checkboxes, such as 'A study on food-medicine continuum among the...' by Esakkimuthu, S.; Darvin, S. Sylvester, and 'Fludarabine and antithymocyte globulin-based c...' by Lu, Ying; Cao, Junjie; Pei, Renzhi.

SmartCite

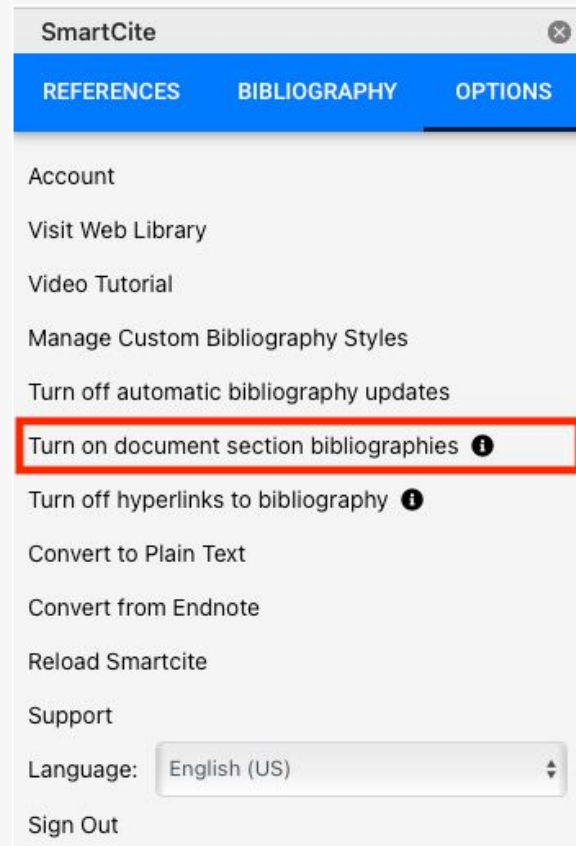
Multiple Section Bibliographies

SmartCite for Word supports multiple section bibliographies

To enable this feature

- From the Options tab, select 'Turn on document section bibliographies'
- Once enabled, bibliographies are divided by the document's section breaks
- SmartCite supports four different section breaks in Word
 - continuous
 - next page
 - odd page
 - even page
- Each section break will have its own incrementing list of citations and bibliography

Please note: Word Online does not currently support adding section breaks. However, if a document is created in the desktop version of Word with sectional bibliographies, those will still work in the document if later opened in the Online version.



SmartCite

Hyperlinking

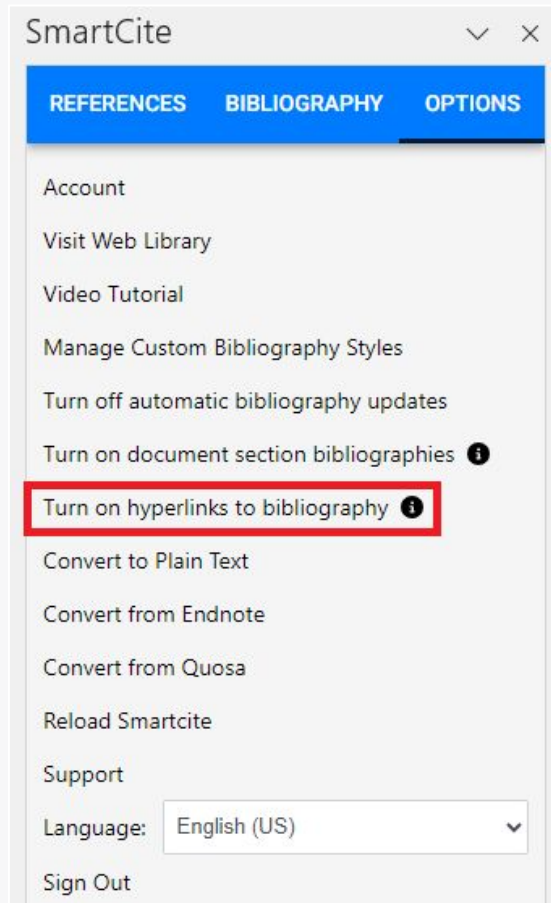
SmartCite for hyperlinking inline references to the corresponding reference in the bibliography

To enable this feature, navigate to the Options tab and select 'Turn on hyperlinks to bibliography'

Tip: When using this feature, if you click into an inline citation, Word will hyperlink you to the bibliography section. While editing your document, this may not be the desired behavior, if for instance, you wanted to edit the inline citation.

If you wish to edit an inline citation while the hyperlinks feature is turned on, position the cursor near the inline reference and use the arrow keys on your keyboard to move the cursor to the inline reference. Upon doing so, you will see the edit options in the SmartCite panel.

Alternatively, you may choose to turn off the hyperlinks feature while you are actively editing the document, and then turn it back on when you're finished and ready to share your document.



SmartCite

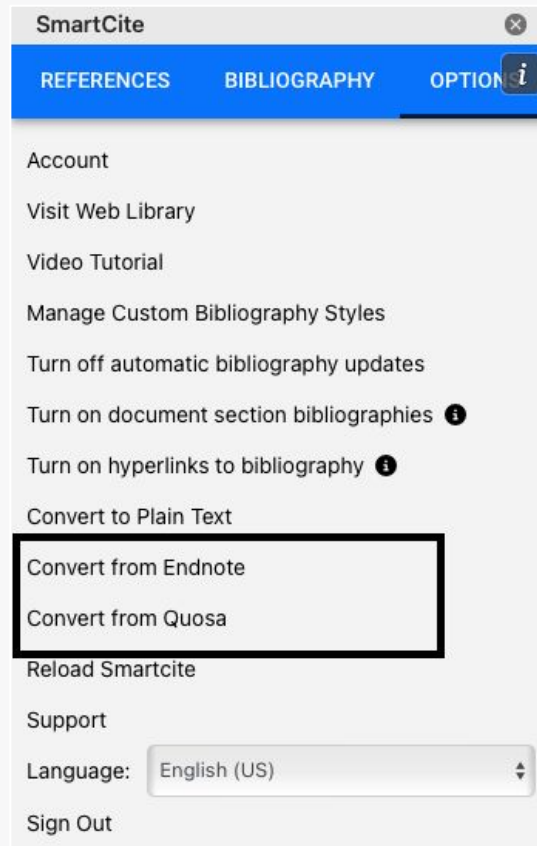
Converting documents from EndNote & Quosa

Easily convert documents originally created with EndNote or Quosa so they're compatible with SmartCite with the click of a button!

To convert a document:

- Open the document in Word
- Navigate to the Options tab and select either Convert from Endnote or Convert from Quosa, depending on your document type.
- SmartCite will convert all references in your document so that they are compatible with SmartCite.
- Any references not already in your library will be added to your Personal Library in ReadCube

Tip: Please ensure Track Changes & Comments features are turned off before converting as it does not support these features. Please [see here](#) for more info.



SmartCite

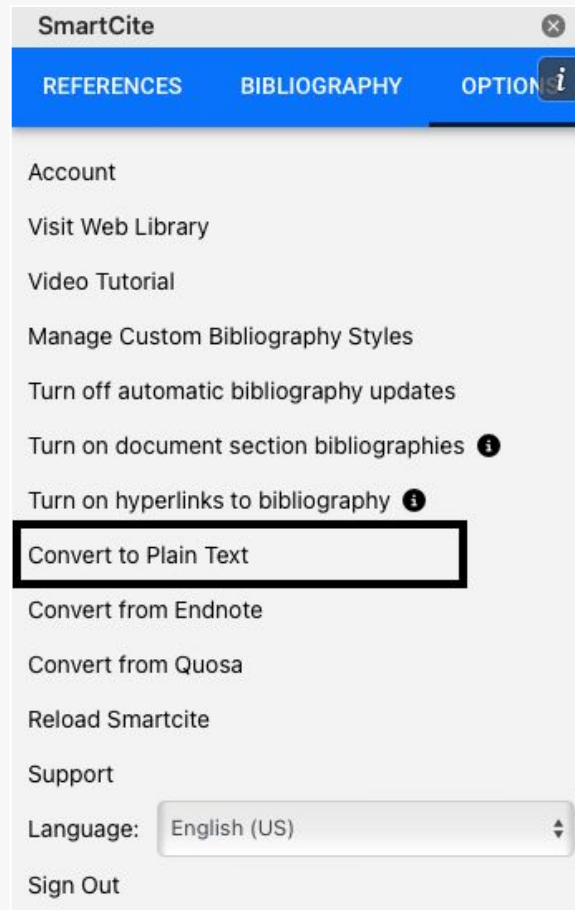
Plain text

SmartCite also supports converting your references to plain text

To convert your references from SmartCite to text

- Open your document in Word
- Navigate to the Options tab and select 'Convert to Plain Text'
- 'Select Convert Document'

Tip: The conversion process is irreversible so it is a good idea to save a separate copy with your SmartCite References before converting.



SmartCite

Formatting Citations

SmartCite supports special formatting (italics, bold, subscript, superscript) in a citation.

In order to edit a record's formatting, start in the ReadCube library and select the record that you'd like to format.

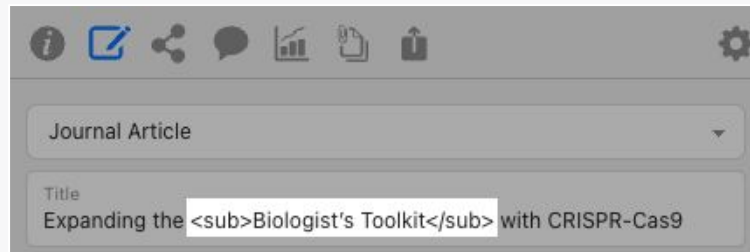
Using the Edit tab, edit the metadata to include:

- Bold: `<b>text</b>`
- Italics: `<i>text</i>`
- Subscript: `<sub>text</sub>`
- Superscript: `<sup>text</sup>`

Remember to save the edits you on the record by clicking "Save".

Insert the citation into the document (see "Add References" slide for more on this). Under Bibliography, the citation will display with the special formatting.

You can use multiple format types in a singular citation.



SmartCite

Tips for slow performance

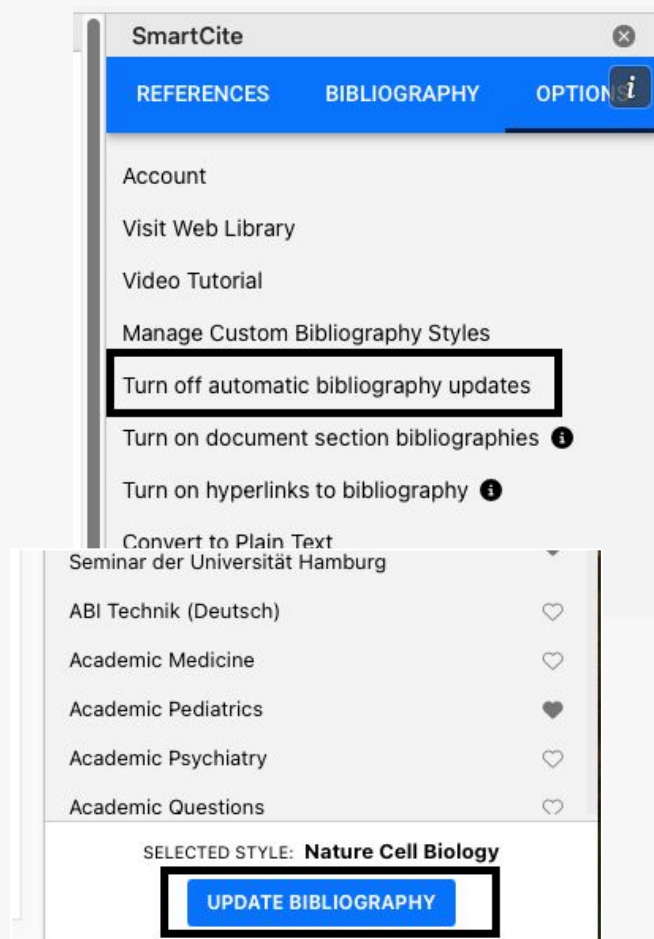
If you notice SmartCite is performing slowly when working with a large document or document containing a large number of citations, don't worry! It's due to SmartCite checking all of the citations within the document and syncing the data with your library, which can be time consuming.

To minimize delays, simply 'turn off automatic bibliography updates' under the Options tab.

Once you've entered or updated your citations, navigate to the Bibliography tab & select 'Update Bibliography' to update the document.

Please note:

- Depending on the size of the document & number of citations, it may take a few minutes to update the bibliography
- While most users do not experience lags, performance can be influenced by factors such as document size, number of citations and figures, and the version of Word. As a result, we do not provide specific best practices, such as turning off auto bib updates, based on the number of pages or citations in a document.

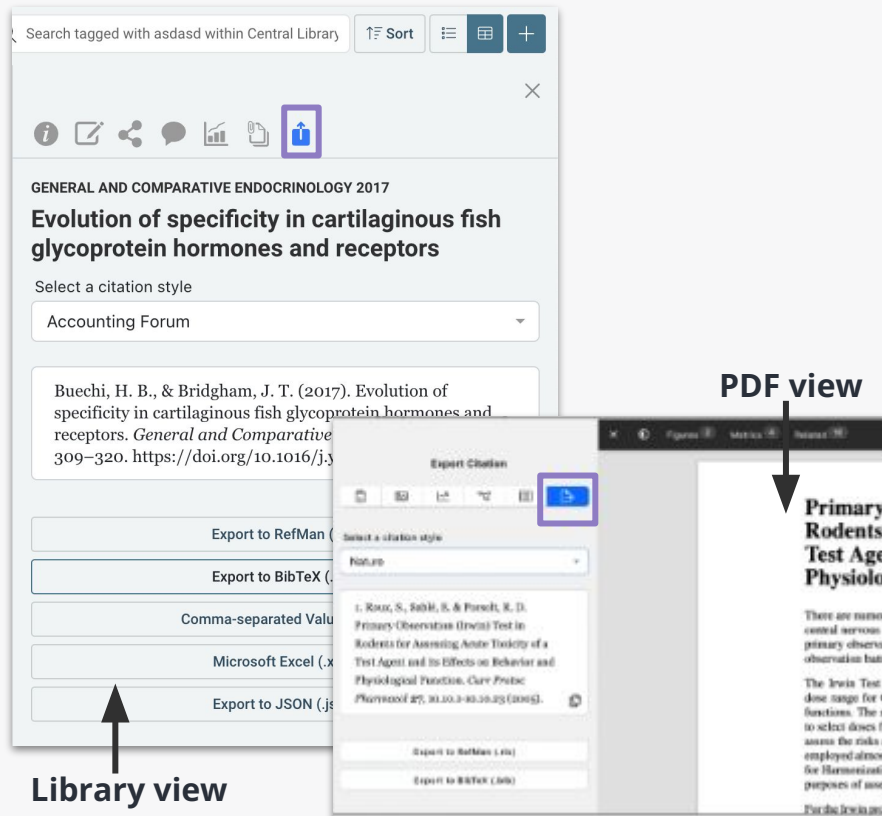


SmartCite

Citation Export Options

Easily copy a reference directly from within your library. On the "Export Citation" panel you can select the style.

Easily set a default citation style in the desktop app under Settings.



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.