

ReadCube Administrator Guide

ADMIN USER GUIDE / V 2.0 / AUGUST 2024

Welcome to the Admin Dashboard Guide

The Admin Dashboard allows an organization's administrator(s) to:

- **View authentication settings**
- **Manage users & track usage statistics**
- **Manage document delivery settings, process orders, and generate reports**

Need help or guidance? Don't hesitate to reach out to your Client Engagement Manager!

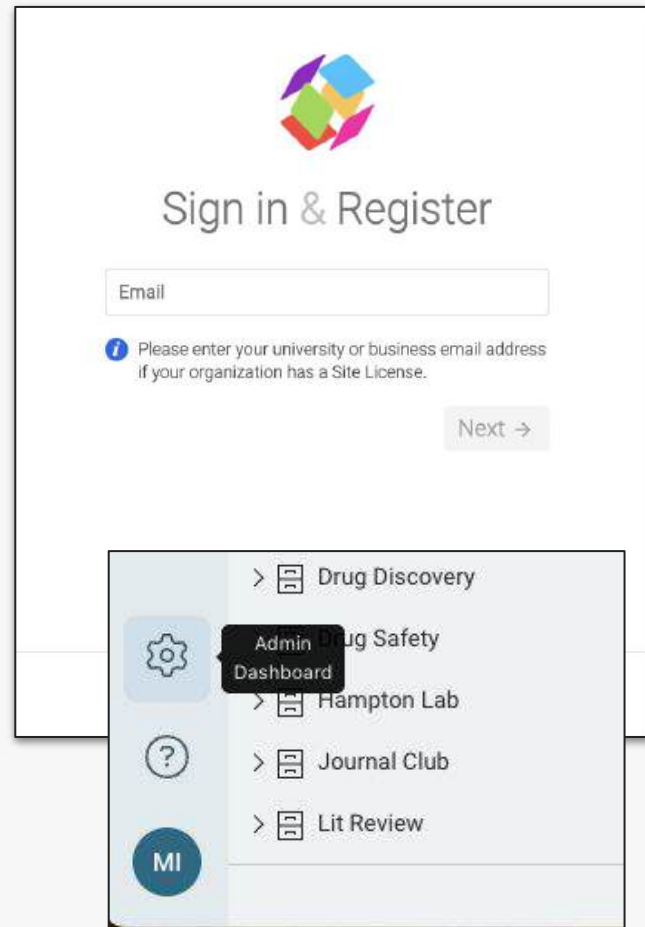
Accessing the Dashboard

Navigate to the Admin Dashboard (dashboard.readcube.com), where you'll be promoted to sign in using the same credentials you use to access the libraries.

For your convenience, we recommend bookmarking the link.

You can also access it within the web app by clicking the wheel in the bottom left-hand corner (*this option only appears for designated organization admins*).

If you experience any login issues, please contact support@readcube.com.



Navigation

Quick Links

We've added a Quick Links section to the left-hand panel, giving you quick access to key actions like booking a training session or contacting support.

From here, you can easily:

- Access to this guide
- Email your account manager
- Receive technical help
- Add additional licenses to your account
- Add more funds to your document delivery budget
- Book a training session for yourself or your group



Account Settings

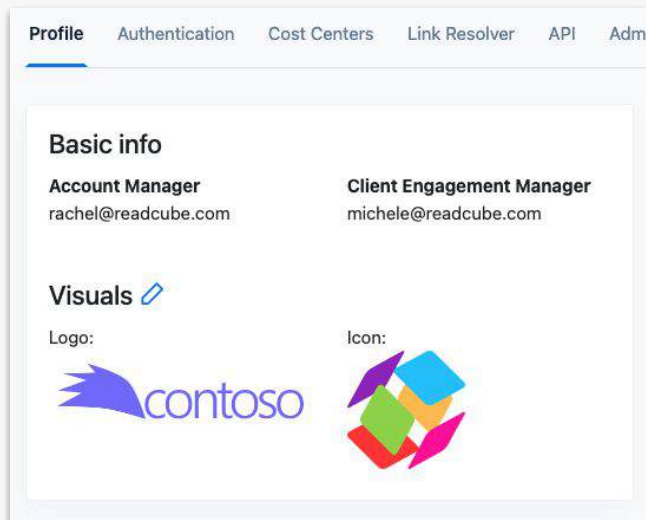
Company Logo & Browser Extension Icon

Under the Profile tab you can add/update your organization's logo and browser icon, which will be viewable by members of the organization when logging into their account.

Your logo or icon can be uploaded directly from your computer.

Recommended file sizes

- Logo: 100 x 100px
- Icon: 40 x 40px



Account Settings

Authentication

Username & Password

The username is your organizational email address

Single Sign On (SSO)

If your organization utilizes a Single Sign On (SSO) for authentication, this can be used to securely authenticate your users through their institutional logins.

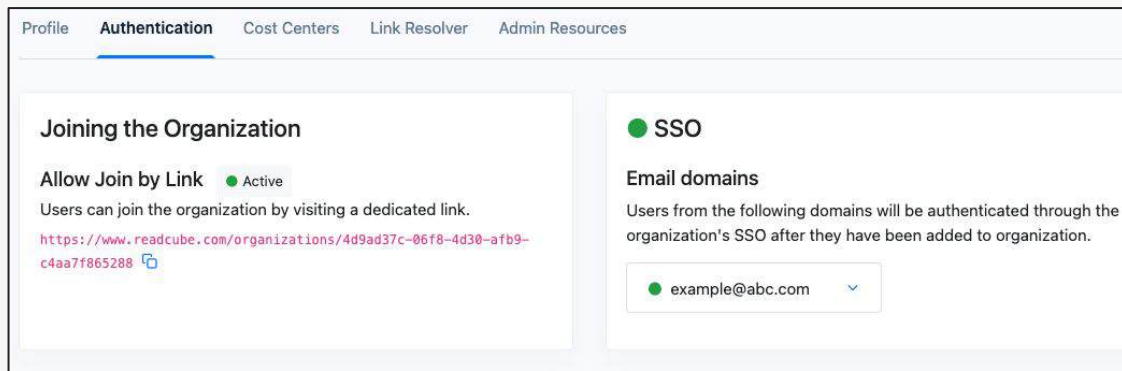
During the initial setup, a "Test Mode" is available that allows you to test logging in with an email address (down below) without disrupting any existing users who already login with their email address and a password. Once the Test Mode is disabled, all users with an email address associated in Email Domains will be prompted to authenticate via SSO.

Email Domain

Enter the email domain(s) associated with your organization. Any user registering or logging in with an email address matching one of your domains will be automatically associated with your account and routed through your authentication method (SSO or un/pw).

Join Link (Optional)

A join link enables individuals to join your organization by clicking a unique URL that directs them to your organization's account, where they'll be prompted to log in.



Account Settings

Assigning Costs Centers

You may assign a cost center to each document delivery purchase to segment spending or bill back purchases to clients.

- These cost centers can either be text or numerical.
- It's important to note that cost centers will not automatically be applied to previous document delivery purchases, but we're happy to assist if you'd like us to do so!

Manage your cost centers under Account > Cost Centers. *If you do not see this option, please reach out to your client engagement manager to activate.*

The cost center column will not appear on the user tab until at least one cost center has been created for your organization.

The screenshot shows the ReadCube Account Settings interface. The sidebar on the left contains the following links: Account, Users, Libraries, Holdings, Document Delivery, Pending Requests, Literature Review, and a section for QUICK LINKS with links to Admin Dashboard Guide, Contact Account Manager, Submit a Support Ticket, Request Addition, Add Document, Funds, and Book a Training. The main content area is titled 'Cost Centers (12)' with an 'Add New' button. Below this is a table with columns for Name, Role, Cost Center, and License. The table lists several cost centers: Clinical, Legal, Manufacturing, Marketing, No doc del, Pharma, PSMs, and others. A dropdown menu is open for the 'COST CENTER' column, showing options: None, Clinical, Med Affairs, and R&D.

Name	Role	COST CENTER	LICENSE
Clinical			Delete
Legal			Delete
Manufacturing			Delete
Marketing			Delete
No doc del			Delete
Pharma			Delete
PSMs			Delete
			Delete
			Delete
			Delete
			Delete

Dropdown menu for COST CENTER:

- None
- Clinical
- Med Affairs
- R&D

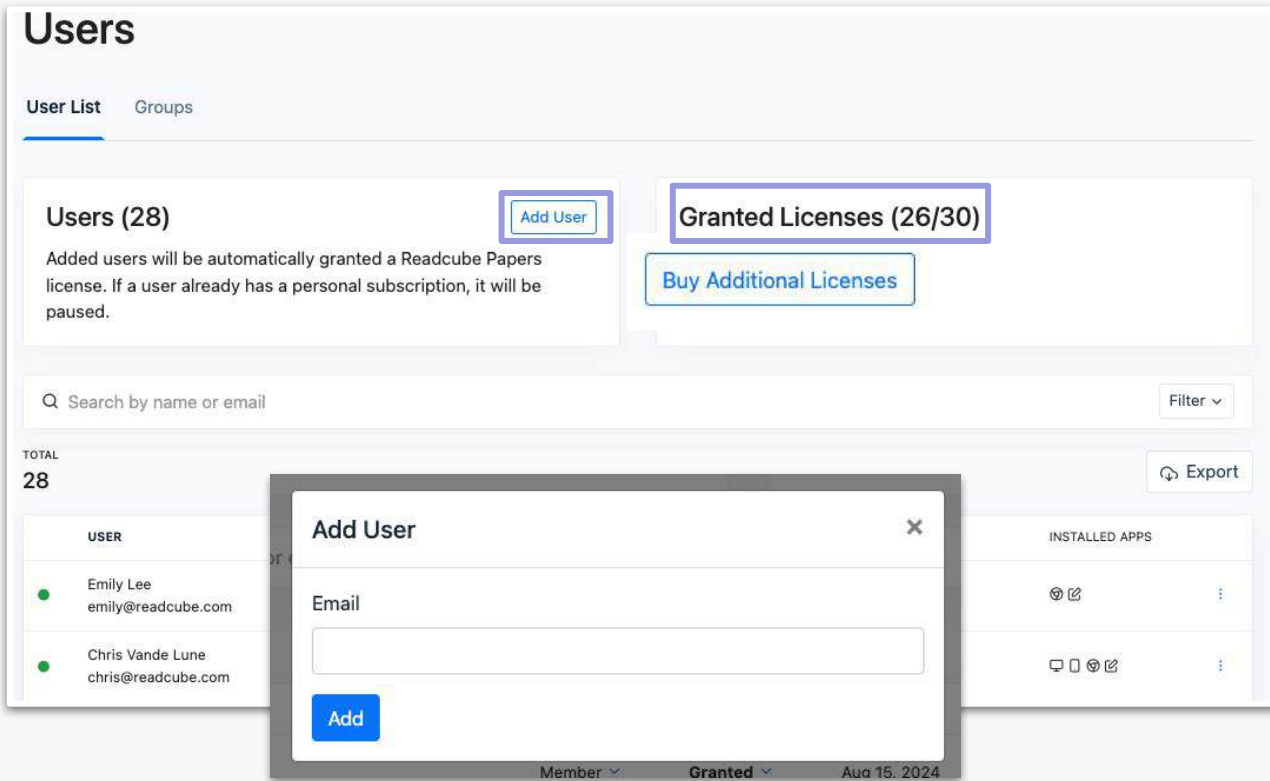
User Management

Adding a User

Under the Users tab, you can view the total number of licenses for your organization. It also shows how many are in use.

To add a user, select “Add User” & enter their email address.

The user will receive an email containing a registration link. After clicking the link to confirm their registration, they'll be prompted to log in.



Users

User List Groups

Users (28) [Add User](#)

Added users will be automatically granted a Readcube Papers license. If a user already has a personal subscription, it will be paused.

Granted Licenses (26/30) [Buy Additional Licenses](#)

Search by name or email Filter

TOTAL 28

USER
Emily Lee emily@readcube.com
Chris Vande Lune chris@readcube.com

INSTALLED APPS

[Add User](#)

Email

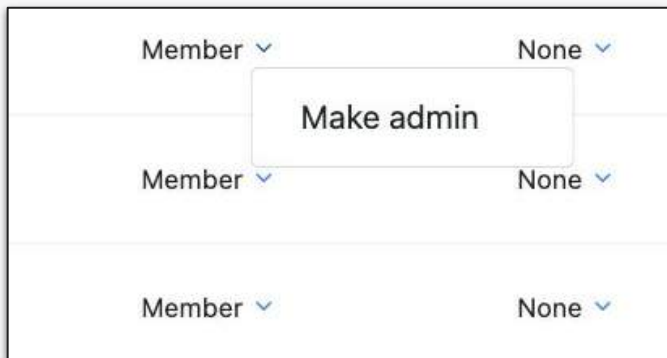
[Add](#)

Member Granted Aug 15, 2024

User Management

Adding and Removing Admins

As an Admin, you can change Role responsibilities under the Role section. Select from the drop down menu to give admin status to a user. You can also remove a user as an admin, which will set their role to Member.

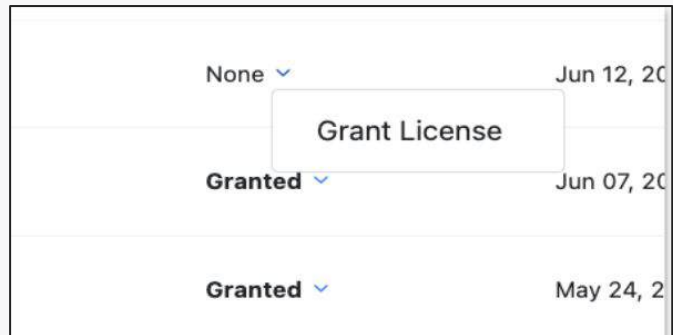


Granting & Revoking a License

Typically licenses are automatically granted upon a user being associated with the account, however if your organization's setting require you to manually grant licenses, you can easily do so.

If an user no longer requires access to the platform, you can revoke their license and assign it another user. When you do so, they will retain access to content within their personal library but will be removed from shared libraries & other functionality. If they need access at a later date, you can easily grant a license to revive their full functionality.

If a user is no longer with the organization, please see steps for deactivating [here](#).

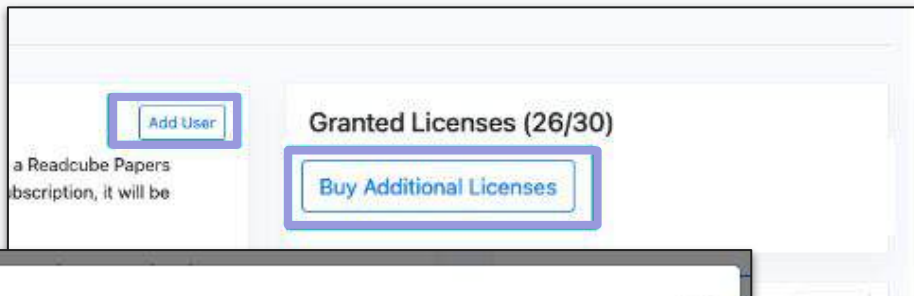


User Management

Requesting Additional Licenses

To request additional licenses, select 'Buy Additional Licenses' under the 'Users' tab.

The licenses will be added immediately & billed to your account, however if your organization requires POs, we will first generate a quote. Once we receive the PO, the seats will be granted.



Add Seats

Number of additional seats

Prorated price:

Billing settings indicate that a quote is required to generate a company purchase order (PO).

Once you click "Send Quote", a quote will be emailed. When the PO is received, the seats will be immediately added to your account.

Send Quote

User Management

Monitoring User Activity

INSTALLED APPS



- Desktop
- Mobile
- Browser Extension
- SmartCite

You can track the activity of your organization's members on the right side of the 'Users' screen.

This section provides details such as when each user registered, their last login, and the apps they have installed.

If a colleague hasn't activated their account yet, you can easily send them a reminder email to encourage them to join your organization by clicking 'Resend Invite?' under last seen

TOTAL 28							Export
USER	ROLE	LICENSE	REGISTERED	LAST SEEN	INSTALLED APPS		
 Emily Lee emily@readcube.com	Member	Granted	Sep 26, 2023	Aug 16, 2024	 		
 Chris Vande Lune chris@readcube.com	Member	Granted	Jul 12, 2023	Aug 16, 2024	   		
 Adrien adrien@readcube.com	Admin	Granted	May 29, 2023	May 23, 2024	 		

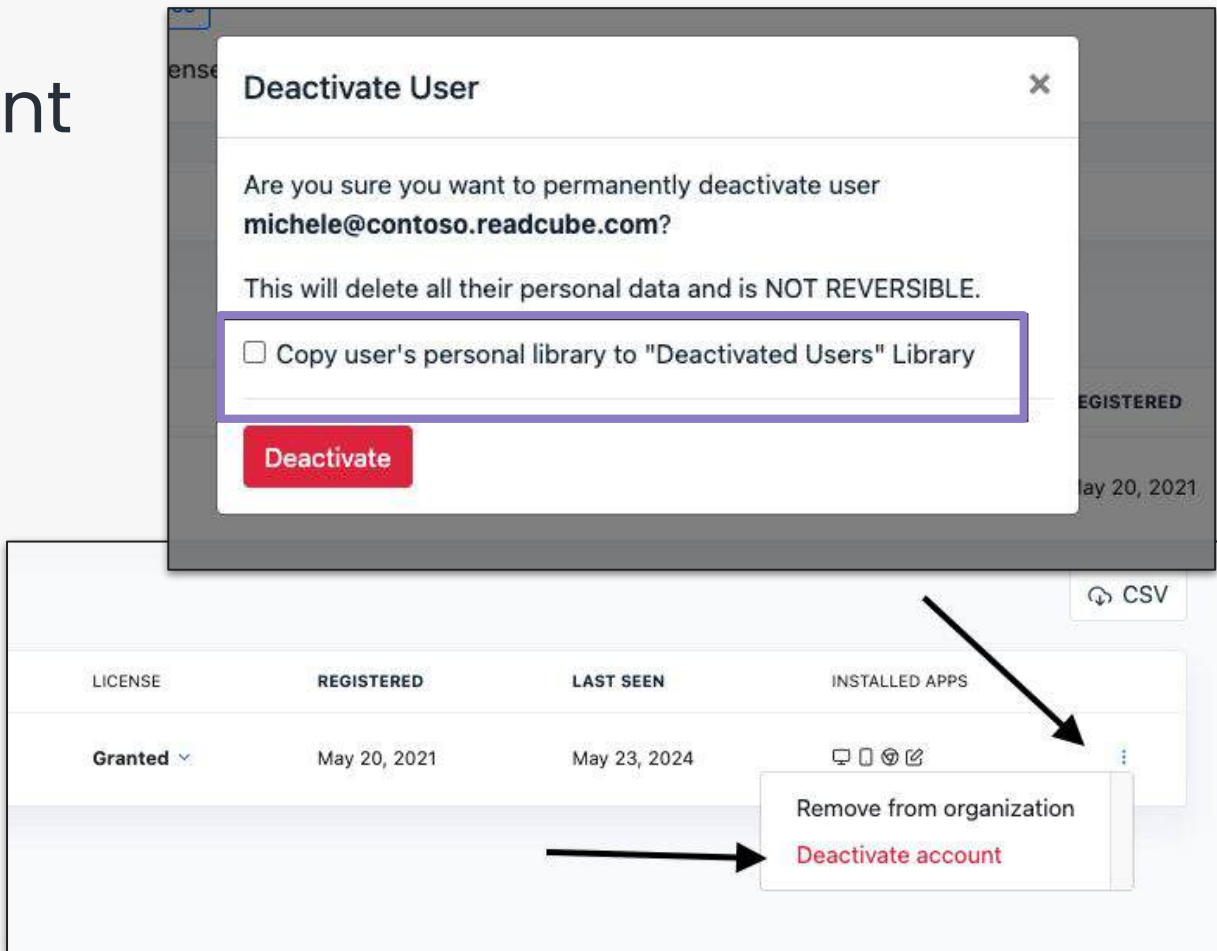
User Management

Removing Users

If a user is no longer with the organization, simply deactivate their account by clicking on the three dots next to installed apps & select 'Deactivate account'.

Once deactivated, you can easily copy the contents of their personal library to a main 'Deactivated Users' library to ensure you consolidate their valuable research!

'Remove from organization' is used if you need to remove the user from being association with your organization.



The screenshot displays the 'Deactivate User' dialog box, which asks for confirmation to permanently deactivate the user **michele@contoso.readcube.com**. It states that this action will delete all personal data and is NOT REVERSIBLE. A checkbox option is available: ☐ Copy user's personal library to "Deactivated Users" Library. A red 'Deactivate' button is at the bottom.

Below the dialog, a table lists users. The first row shows a user with the license 'Granted', registered on 'May 20, 2021', and last seen on 'May 23, 2024'. The 'INSTALLED APPS' column for this user has a three-dot menu icon. An arrow points from this icon to a dropdown menu that contains the options 'Remove from organization' and 'Deactivate account'.

LICENSE	REGISTERED	LAST SEEN	INSTALLED APPS
Granted ▾	May 20, 2021	May 23, 2024	 Remove from organization Deactivate account

Libraries

Managing Shared Libraries

The Libraries section of the Admin Dashboard provides information about the Shared Libraries within your organization.

You can view users and their associated permissions within each library, add or remove users, update permissions, and more!

Simply click the people icon next to the user count to view and make changes!

Library List

Sharing Plan:  Users can access this library

 External users are not allowed to access this library

Library List

 Search by name

Library users

 Include All Users

disabled

 demo+contoso2@readcube.com

demo+contoso2@readcube.com

X

member

 Olivia Bates

olivia+contoso2@readcube.com

X

admin

Add users

Search by name or email

Save

TOTAL

197

Export

1234»

NAME	USERS	JOIN LINK	ARTICLES	LAST UPDATE
Elephant Shark Library 	 1		12	Aug 16, 2024 04:19 AM 
Clinical 	 1		9	Aug 14, 2024 04:45 PM 
KBase Library 	 6		889	Aug 14, 2024 09:15 AM 
Lab Library 	 1		12	Aug 13, 2024 02:38 PM 
Drug Safety 	 3		54	Aug 08, 2024 01:41 PM 

Libraries

Options for Adding Users to a Shared Library

Invite each users individually (*the most common method*)

Invite the entire organization

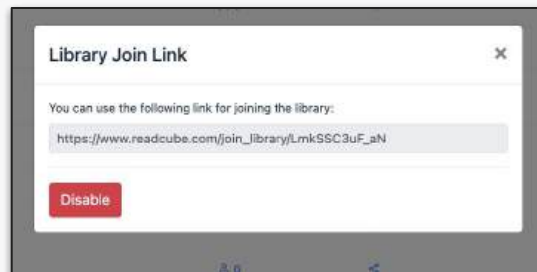
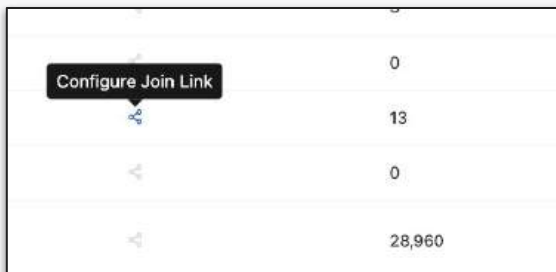
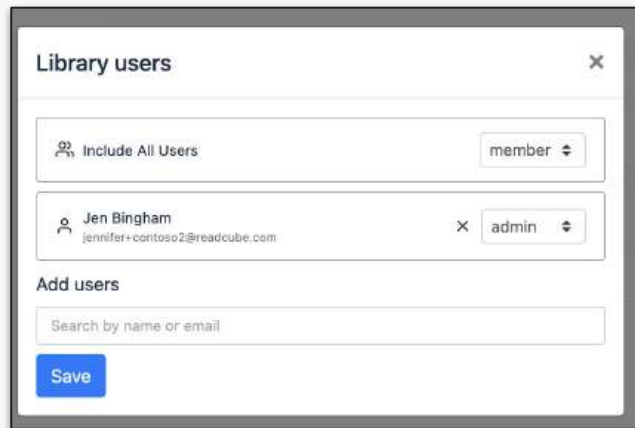
Includes all existing users & any users added in the future

Create a group

Groups are best served when you have the same group of individuals who work on various projects/workstreams. For example: R&D, Clinical Development, etc.

Share a join link

This is helpful when you want to open a library to numerous individuals within the organization without opening it up to everyone. Maybe it's a library supporting a workstream where colleagues are being added and removed based upon the point of the research, so you create a join link to allow members to gain access when needed, rather than manually doing so.. Easily create it by selecting the two prongs next to the library.



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).
- Please direct all end users to contact Customer Service, and if it's needed, they will escalate. As an account admin, please feel free to direct your questions directly to client engagement manager, however if it's a general question, Customer Service is ready and able to assist

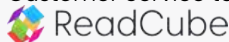
Client Engagement Manager

- 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.

Sales Director

- To discuss any questions related to your contract and renewal
- For any billing / invoicing questions related to your software renewal
- Your account manager will be brought into discussions regarding new solutions & add-on modules

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.



Holdings: Subscriptions & Token Packages

ADMIN OVERVIEW

Holdings

Holdings

For clients utilizing our Document Delivery service, we require organization-wide subscriptions and/or token packages to be configured. You can view what we have on file under the holdings tab.

Please contact your client engagement manager if you need to make any updates.

Please note: ReadCube integrates with your existing workflow and publisher subscriptions/token packages regardless if they're configured within ReadCube so please do not worry if we don't have them on file. Simply authenticate as you typically do and ReadCube allows you to retrieve the full text to add to your library!

Holdings Access Logs Settings

Holding Packages

Elsevier	Token	client_vpn
Springer	Subscription	client_vpn

Last holdings imported Aug 19, 2024 06:04 AM

Filter v

TOTAL
4,314

Export 1 2 3 4 5 »

JOURNAL	PUBLISHER	COVERAGE	INTERFACE
The Lancet 0140-6736	-	Full Coverage	Elsevier Token Purchases Show Events
Journal of Biological Chemistry 0021-9258	-	Full Coverage	Elsevier Token Purchases Show Events

Holdings

Access Logs

For clients with subscription or token packages configured, you can access a log that displays requested articles and whether ReadCube successfully retrieved them using your authentication method you have on file with the publisher.

- Green = success
- Red = failure

This workflow displays the data so you can easily identify if an individual is not following the correct process (i.e. being on VPN, signed in with the publisher, etc.) or if there's a systemic issue accessing content for the publisher you need to look into (i.e. token package was depleted, IPs inadvertently removed, etc.)

VIEWED	USER	CONTENT	ACCESS	STATUS
May 23, 2024 02:48 PM	michele@contoso.readcube.com	10.1126/science.add5473 0036-8075, 1095-9203 © science	subscription client_vpn browser_extension chrome-v4.106	
May 23, 2024 10:41 AM	tyler@readcube.com	10.1126/science.abe6474 0036-8075, 1095-9203 © science	subscription client_vpn browser_extension chrome-v4.106	

Pending Requests

Holdings Requests

If an individual experiences issues accessing content covered by your organization's subscriptions or token packages, they receive a message prompting them to verify they're properly authenticated and to retry the download.

In the case they're unsuccessful, they can request access support, which triggers a email notification to the designated admin(s).



Hi,

michele@contoso.readcube.com from your organization has requested assistance accessing an article "Fossil imprints from oceans of the past", identified as part of your organization holdings.

This can be because your subscription may be expired, tokens depleted, or a particular subscription required a specific access path (like being physically within the office) that was not followed. Please review the request details via [your dashboard](#).

Please let us know if you have any questions.

Thanks,
The ReadCube Team

 Your organization has token access to this publication.

We were unable to automatically download the Full Text for this article from your subscription. There may be a temporary issue with the publisher or access to your publisher subscription.

 **Retry Download**

You may also try accessing the content directly from the publisher:

 **Publisher Website**

If you still cannot access the content, you may submit an access request to your account administrator:

 **Request Access Support**

Pending Requests

Holdings Requests

At that point, you may review & process the order within the dashboard.

Easily link out to obtain the article directly from the publisher's website to upload by clicking on the blue arrow next to the title.

If you discover you're unable to access the content, you can fulfill it through document delivery to minimize delays while you work with the publisher to replenish the token package or reinstate access.

Decline Request

The request for article "Structures of Tetrahymena's respiratory chain reveal the diversity of eukaryotic core metabolism" will be declined.

Use the optional text box below to share a note with your team member as to how they can access the article (ie. retry when on VPN or use username/password on publisher site).

Note:

Decline

Holdings Requests Docdel Request

Search by email or DOI

TOTAL
2

REQUEST	ARTICLE	PUBLISHER	ACCESS	REQUESTED BY	
May 18, 2023 10:52 AM	Structures of Tetrahymena's respiratory chain reveal the diversity of eukaryotic core metabolism 10.1126/science.abn7747 	science	token	michele@contoso.readcube.com	Fulfill  Decline
Mar 31, 2023 12:19 PM	All topological bands of all nonmagnetic stoichiometric materials 10.1126/science.abg9094 	science	token	michele@contoso.readcube.com	Fulfill  Decline

Upload PDF
Request via DocDel

Document Delivery

ADMIN OVERVIEW

Document Delivery

Deposits

The deposits tab allows Admins to see their remaining document delivery budget and previous deposits.

If your organization requires a PO, you can now easily upload the PO directly in the Admin Dashboard. Doing so will automatically advance 50% of the doc del deposit or immediately add the additional seats

The screenshot displays the 'Deposits' tab in the Admin Dashboard. At the top, there are navigation links for 'Deposits', 'Purchases', and 'Settings'. Below these, the 'Budget remaining' is shown as '\$86,097.50' with an 'Add funds' button. A 'Billing' section follows, containing a table of recent transactions. To the right, a callout box highlights the 'Waiting for Purchase Order' status with a 'Resolve' button and options to 'Upload PO' or 'PO Not Needed'.

Deposits Purchases Settings

Budget remaining: \$86,097.50

Add funds

Billing

Requested	Amount	Method	Status
Jul 06, 2023	\$1,000.00	ACH / Wire	Waiting for Purchase Order
Jul 05, 2022 alex@labtiva.com	\$250.00	ACH / Wire	Paid lsdfhsodif

Waiting for Purchase Order **Resolve**

Waiting for Purchase Order

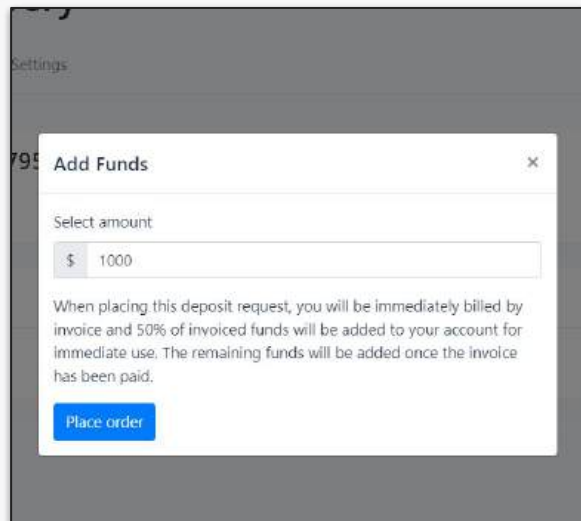
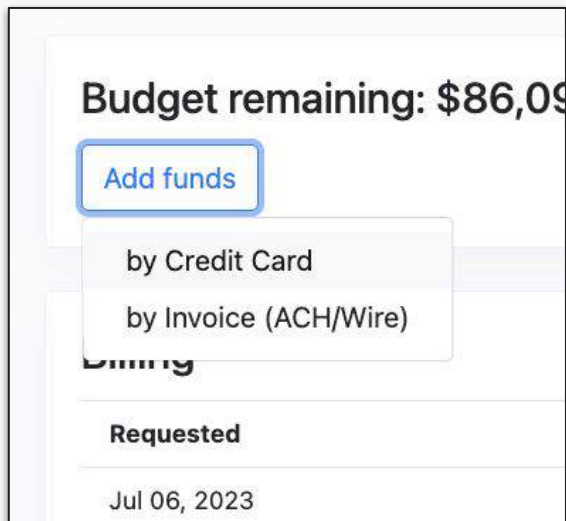
Upload PO
PO Not Needed

Document Delivery

Adding Funds

You can easily top off your deposit account directly within dashboard by clicking 'Add Funds'.

Pay by credit card or Invoice (ACH/Wire). If you request an invoice, we'll grant 50% of the funds immediately and add the remaining once the invoice has been paid. If your organization requires a PO, we will advance the first half upon receipt of the PO.



Document Delivery

Track Purchases

The Purchases tab provides access to document delivery reports including: User, Purchase Date, DOI, Journal, Price, and Cost Center.

View all information directly within the dashboard or export it to a CSV file for deeper analysis. You can also filter by time frame, cost center, cost, or publisher

The Reprints tab also allows you to view the same information but specifically for reprint purchases.

845

Purchases completed

\$32,236.50

Spent

\$38.14

Average price

Q Search by ISSN or DOI

Filter ▾

TOTAL

845

Export

1

2

3

4

5

»

USER	PURCHASE DATE	DOI	JOURNAL	PRICE	COST CENTER
fatema@readcube.com	Aug 22, 2024 05:43 PM	10.1016/j.bio cel.2010.12.0 05	The International Journal of Biochemistry & Cell Biology 1357-2725, Sciencedirect	\$58.00	Sales ↗
I.black@digital-science.com	Aug 21, 2024 02:00 PM	10.1016/b97 8-0-323-90 980-8.0001 6-9	Book Chapter Sciencedirect	\$58.00	PSMs ↗

Document Delivery

Settings - Notifications

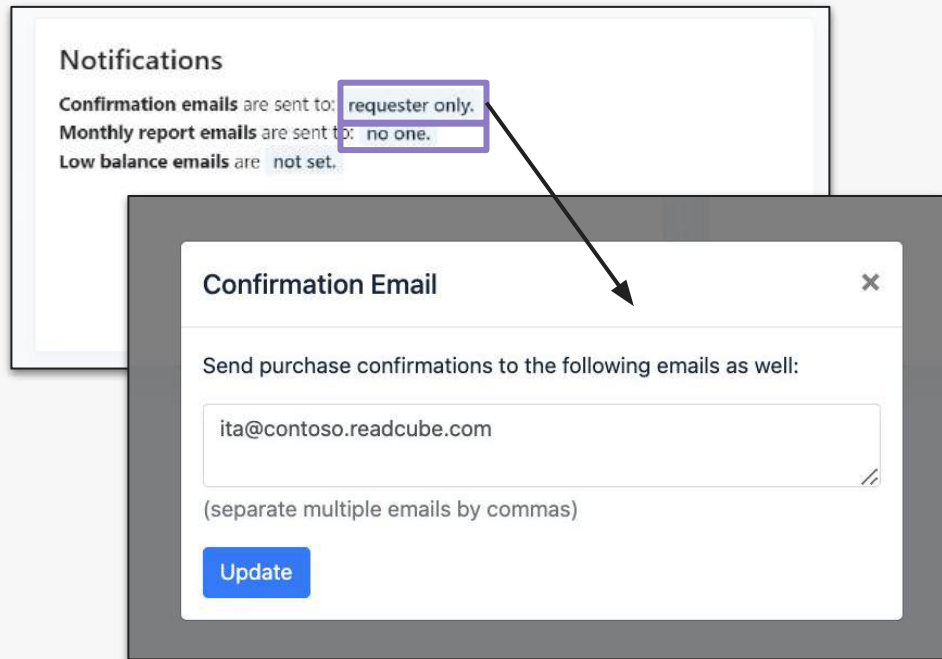
Confirmation emails (optional)

If you'd like to receive an email confirmation for each purchase within the organization, you can easily designate one or more individuals to receive them.

Click on the greyed out area to add or update who you'd like to receive them.

Monthly Reports (optional)

There is also the option to receive monthly reports that automatically generate and include all orders from the previous month



Document Delivery

Settings - Notifications

Low Balance (Required)

Admins can set a low balance email notification to be alerted when the organization's budget falls below a desired threshold.

We recommend setting the alert limit to \$500 or higher depending on the volume of your document delivery orders and size of the organization. This allows your team time to replenish the deposit account prior to be depleted and delaying orders.

If your organization requires a PO, we recommend a higher threshold so you have time to work with your finance team to obtain the PO.

To update the recipient of the email or the desired threshold, click on "not set" or "amount" highlighted In grey. *They are not required to have a seat to the platform - they can simply have access to the Admin Dashboard.*

Notifications

Confirmation emails are sent to:

ita@contoso.readcube.com

Monthly report emails are sent to:

michele@contoso.readcube.com

Low balance emails are sent when the budget falls below **\$1,000.00**

Low Budget Email



An email will be sent when the budget falls below the limit:

\$

1000.0

Notify emails:

jacob@readcube.com

(separate multiple emails by commas)

Update

Document Delivery

Settings – Approvals

Price Limit Thresholds

If you'd like to mediate your document delivery purchases, you have the option of setting a price limit. Any orders exceeding the threshold, will inform the requestor & trigger an email the designated admin(s) to review & approve the order. *They are not required to have a seat to the platform - they can simply have access to the Admin Dashboard.*

The average article fee usually falls between \$40 and \$50, with occasional fees reaching \$75. To ensure most orders are processed immediately and made available to the requestor, we recommend setting a threshold of \$80 or higher.

Approvals

Requests **above \$80.00** require approval.

Approval emails will be sent to

ita@readcube.com,
sonia@readcube.com



You may request this article. Requests must be approved by your organization's library administrator.



PDF

Order PDF

Delivery **Usually delivers within 4 hours upon approval**

Price **\$63.00 - \$100.00 (estimated)**

Document Delivery

Settings – Document Delivery

Copyright License

If your organization has a copyright license provided by a Reproductive Rights Organization (RRO), please ensure the dashboard reflects that as it impacts the way ReadCube manages Elsevier's terms & conditions.

Below is a list of RROs available within the dashboard. If you do not see the particular agency you're working with, please select 'other'.

- CCC ACL - RightFind Advisor
- Copyright Licensing Agency (CLA)
- Copyright Agency (CA)
- Other

Document Delivery

Copyright License: **CCC ACL - RightFind Advisor**
Elsevier additional purchases will be **prompted**

Document Delivery

Settings – Document Delivery

Elsevier Additional Purchases

The contractual terms within which we offer Elsevier content reflect industry standard limitations on how many times an article can be shared with other members of the organization. As a result:

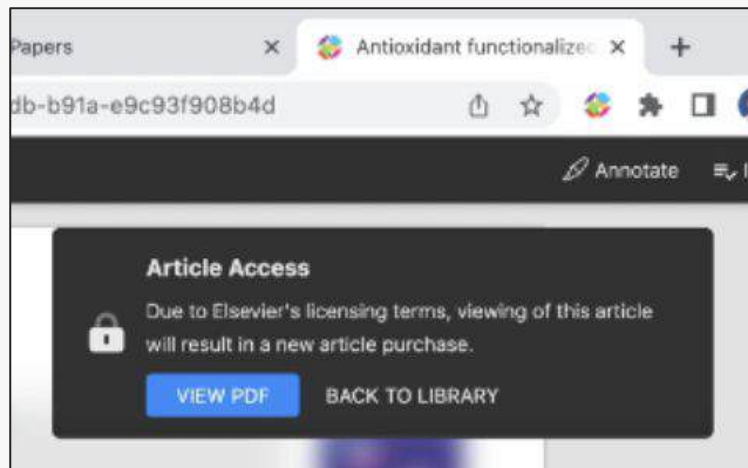
- If your organization *holds a copyright license*, members of your team will be able to share an article up to five times – upon attempting to share with a sixth user, an additional article purchase will be required.
- If your organization *does not have a copyright license*, Elsevier limits viewing to the individual who purchased. Anyone else requiring access would require another article purchase.

Prompted vs Seamless

By default, the purchase will *seamlessly* occur in the background and be automatically approved, however if you'd like to *prompt* the user prior to purchasing, you may do so.

Document Delivery

Copyright License: **CCC ACL - RightFind Advisor**
Elsevier additional purchases will be **prompted**



Pending Requests

Doc Del Requests

For articles requiring approval, admins will receive an email notification whenever a user requests an article that exceeds the threshold. The email includes a link for quick access to the dashboard, where you can review and process the order.

Holdings Requests Docdel Requests Reprint Requests				
Q Search by email or DOI TOTAL 1 Filter v Export				
REQUEST	ARTICLE	REQUESTED BY	PRICE	
Aug 30, 2022 04:47 AM	The ERK2 DBP domain opposes pathogenesis of a JAK2V617F-driven myeloproliferative neoplasm	ita@contoso.readcube.com	\$110.00	ApproveDecline

Document Delivery

Deposit Location (available under Libraries)

Determine where you'd like purchased content stored within the platform:

- Requestor's personal library: limited to the individual requestor
- Organization library: available to everyone within the organization

If you'd like to update the settings, simply navigate to the Library tab and click the cart icon next to the library you'd like the content deposited into. If a library is currently selected, you'll need to unselect it prior to having the ability to select another.

Library List		
Search by name		
TOTAL		
21		
NAME	USERS	JOIN LINK
Central Library 	 All	
		
CF MLC 	 1	