

Xpapers Quick Guide

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Welcome to Xpapers.

You can use Xpapers to store and organise academic PDFs. With one click, Xpapers can store an article via Safari and download its PDF file, if available.

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Initial Setup

| Specify PDF Files Location

Choose where to store your PDFs. The default is your **Documents** folder. If you have iCloud Drive set to sync your Documents folder, this will ensure your PDFs are available on all your devices. Alternatively, choose **iCloud Drive** to make a dedicated “Xpapers” folder in your iCloud drive.

Finally, **Custom...** allows you to choose a specific folder. Choose this option if you don’t want automatic syncing or if you want to use an alternative, such as DropBox or a home NAS.

| Safari Extension

Install the Xpapers Safari Extension in the Extensions pane of the Safari Settings window. Then in Safari, choose the **View | Customise Toolbar...** menu item to add the Xpapers icon to your window’s toolbar.

General Usage

| Importing Papers

If you have a PDF, drag and drop it onto the library view. Dragging it onto an existing row will add it to the pre-existing paper's record. Dragging it between rows will make a new record. Alternatively click the **Add...** button and select one or more PDFs from the import dialog.

In Safari you can use the Xpapers Safari Extension in the window's toolbar to create a new record. Xpapers will attempt to identify metadata, such as title, authors, journal and publication date. If open access it can also automatically download the PDF file (specified in [Settings](#)).

| Opening Papers

Double-clicking or selecting and pressing **return** will open the PDF in Preview. Holding down the **shift** (**↑**) key will open in your selected alternate PDF editor. Specify the alternate PDF editor in [Settings](#).

| Making Notes

In the Summary pane to the right of the library window are edit and preview fields. Make notes in the edit field using [Markdown](#) formatting.

The edit and preview panes can be expanded to a separate window when making larger notes. Click the edit button to the right of the notes pane (**⌘-N**).

You can see all your notes for a given selection in the notes window, accessible from the **Window | Show Notes** menu or typing **⌘-N**.

| Linking Papers

Drag and drop one or more papers to create links in the recipient paper's notes. Hold the option (**⌘**) key to link both papers to each other. You can also copy all the tags or PDFs in up to 4 papers to another paper.

Exporting and Sharing

| Exporting Papers

Edit | Copy (⌘-C) copies the paper's URL to the clipboard.

Select one or more papers and choose **File | Export | PDFs....** This will save the most recent or active PDF for that paper. Alternatively you can drag one or more rows to the Finder. Alternatively, drag and drop a selection of papers directly to the desktop.

You can also export the PDF text using **File | Export | PDFs as Text...**

| Sharing Papers

Select up to 10 papers and click the **Share** or **Mail** buttons in the top right of the toolbar. **Share** allows you to use your Mac's included sharing extensions, such as iMessage or Notes. **Mail** offers a convenient sheet to choose from pre-entered favourite email addresses.

Searching

| Search Field

Use the search field in the toolbar to search by **title** (default), **author**, **journal abstract** or **notes**. You can also search by **any** of the above. Specify the search scope using the drop-down menu at the left of the field. Use **⌘-F** to move focus from the library list to the search field.

Search | Reset (⌘-R) resets the search field — initially clearing its content, subsequently resetting the search scope back to **title**.

| Search Menu

Filter papers using items from the search menu. You can filter by **rating**, **read** / **unread** / **priority to read**, **preprint**, **PDF** or **Notes**.

Priority and **rating** both have convenient toolbar items.

Search | Reset (⌘-R) clears these filters.

| Advanced Find

Search | Advanced Find... (⇧ ⌘-F) brings up the Advanced Find window. This allows you to specify multiple rules such as eg: title contains “Innate”, published after 1/1/2020, rated ≥4.

Rules can be combined to require all or any to determine a match.

Double-click a paper in the found list to show it in the main library, or click the PDF button to view the PDF directly.

Tagging

| Tagging Papers

Tag papers to easily organise by content. With a paper selected, click in the **Summary | Tags** field and type in the tag, eg “Cystic Fibrosis”. As you type, existing tags starting with those letters will be displayed in a pop-up menu. The topmost option will be automatically selected to allow for quick selection via the **return** key. Typing **delete** overrides this automatic selection feature for that entry.

You can also tag papers by dragging one or more onto pre-existing tags in the tag list on the left of the main window.

| Filtering by Tags

Tags appear in the tag list on the left of the library window. Double-click to filter the papers list to those with that tag. You can also type or mouse select a tag and filter to it by pressing the **return** key. Type **⌘-T** to move focus to the tag list.

You can also right click on a paper to filter to one of its tags.

As well as filtering the papers in the library list, the tag list itself will update to display the newly relevant tags. In this way you can progressively filter to papers of interest: eg “Cystic Fibrosis”, “CT”, “Pancreas”.

| Editing Tags

Right-click on the tag list header allows you to display limit the displayed tags, depending on their number of tagged papers (all, 10+, 50+).

Right-click on a tag to rename, duplicate, delete, or remove papers. You can also search for instances of the tag label anywhere in untagged papers. Fully upper-case tags will be searched as upper-case sensitive, useful for eg genes or acronyms.

In the **Summary tab** of the detail pane, each tag has a contextual menu, allowing you to filter to that tag, show its notes or find relevant untagged papers.

PubMed

| Getting Identifiers

Querying Individual Papers

In the **Links** tab of the detail pane, click the **Download** button that appears on-hover adjacent to the **PubMed ID** or **PubMed Central** labels to look up identifiers. This uses the DOI and can populate the journal, publication year, PubMed and PubMed Central IDs, if missing.

Bulk Import

You can also do a bulk import of this data if you download the **PMC-ids.csv.gz** file from the [PubMed Central web site](#). Note this is a very large file once downloaded and unzipped.

Choose **File | Utilities | Update from PubMed CSV File**. Processing may take a few minutes.

Settings

| Safari

Install the Xpapers Safari Extension.

Choose whether to automatically download PDFs when importing a paper via a journal web page.

| PDFs

Specify the standard and alternate PDF viewer/editor when (opening)[#opening] papers.

Choose whether to automatically move imported PDFs to the trash.

| Email

Specify favourite email addresses when [sharing](#) papers.

| Clipboard

You can use the **option** (⌘-C) or **shift-option** (⇧ ⌘-C) to specify alternate templates. The available macros are listed in the disclosable pane.

Save favourite templates using the **Favourites | Add to Favourites...** drop-down menu. Choose a previously stored favourite to replace the current template. Remove favourites with the **option** (⌘) key.

| Advanced

Choose whether to automatically reformat authors on importing. You can manually choose **Papers | Reformat Authors**.

Choose whether to automatically reformat abstracts on importing. You can manually click to reformat using the button next to the abstract in the detail pane.

Specify throttling interval when importing papers via Safari.

Optionally check for beta versions of the software (recommended to leave unchecked).