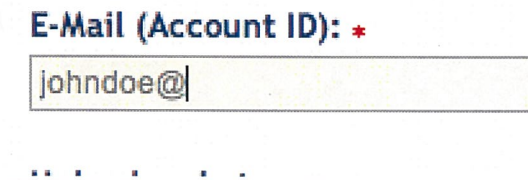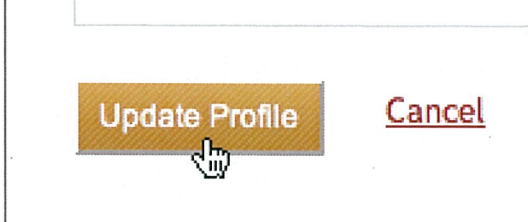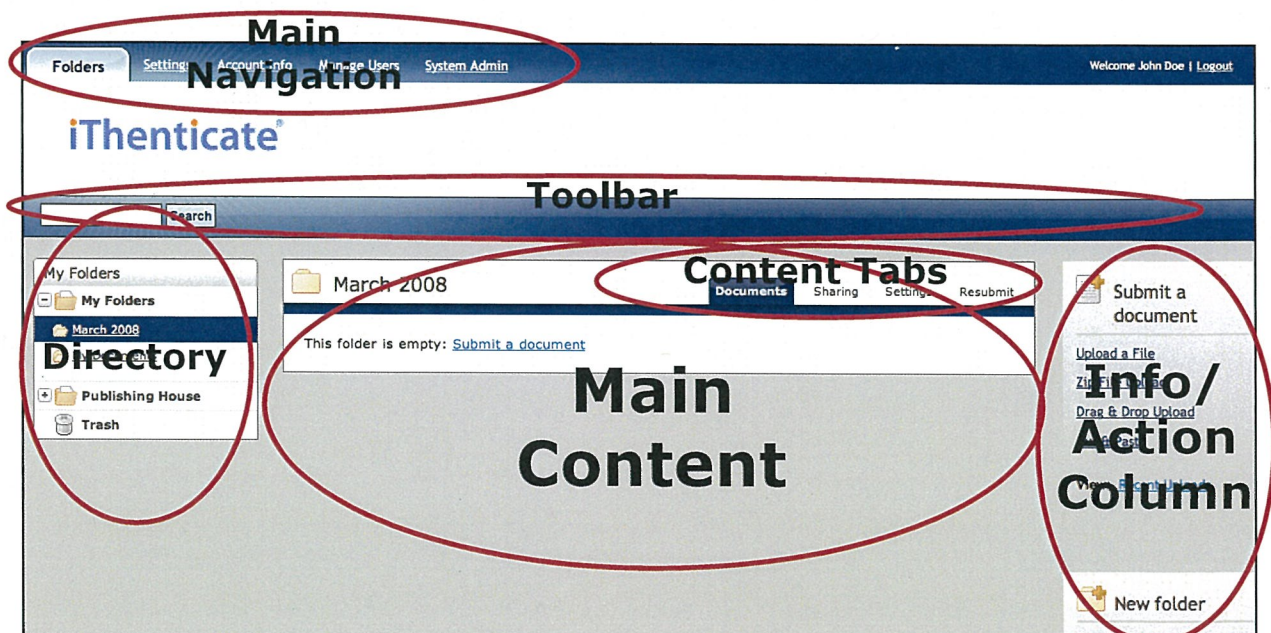| Changing your email	
1. Log into iThenticate by entering your email and password for the iThenticate account and click *Log In*	(Log In) Forgot your password?
2. Click on *Account Info* at the top of the iThenticate homepage	Folders Settings Account Info
3. Delete the previous e-mail and enter the new e-mail into the *E-Mail (Account ID):* field	**E-Mail (Account ID):** * johndoe@
4. To save the changes, click on the *Update Profile* button below the user information form or click *Cancel* to cancel the changes made to the username	Update Profile Cancel

The iThenticate Account Homepage

This section will walk through the different areas of the iThenticate account homepage.

Main Navigation

After logging in, the iThenticate user will see the Folder page. The main navigation bar at the top of the screen has three to four tabs based on the user type. These different tabs are:

- **Folders**: This page contains all the functionality of iThenticate, it is where folders are created, browsed and shared with other users, where documents are submitted within a folder to be checked against the iThenticate database for similarity, and where documents can be deleted or moved from one folder to another

- **Settings**: The settings page controls general, document and report display options. These options range from the number of documents shown for each page, Default Report View, to controlling Email Notifications and much more

- **Account Info**: The Account Information page contains the user profile and the account usage

- **Manage Users**: The Manage Users page lists all users that have access to your iThenticate account. This page is where new users can be added to an account and where activation emails can be sent or where users can be deleted or deactivated from an account. The Manage Users page is also where reporting groups are created, where usage statistics can be viewed, and where the document sharing options are located. *This tab only appears if the user is an Account Administrator*

The Toolbar

The toolbar changes functionality based on what the main content is displaying. For example the toolbar displays the *Search*, *Trash*, and *Move* functions when the user is browsing documents from within a folder. The toolbar is only functional when the user is within the Folders page.

Directory

The directory displays all created folders and the Trash. To enter folders, just click on the folder you would like to browse. Clicking on the Trash opens the Trash, displaying all deleted documents. To permanently delete items from the Trash, click within the check box to the left of the document title and click on the delete button on the Toolbar.

Main Content

The Main content displays the various functional pages within iThenticate.

Content Tabs

The content tabs change depending on what the main content for each page is. For example the content tabs for a specific folder within a folder group are: Documents, Sharing, and Settings. Clicking on each tab opens up a new page displaying the information the tab contains.
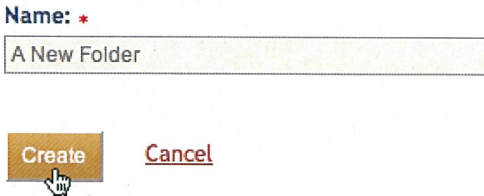
Info/Action Column

The Info/Action Column contains easy access to iThenticate actions and information. The only pages that have action functionality are the Folders page and Manage Users page. For example in the Manage Users page the Info/Action Column contains the action *Add New User* and *Upgrade Your Account* information.
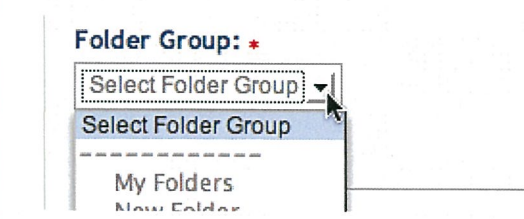
Folders

Creating a New Folder or a New Folder Group

Creating folders and folder groups will help a user organize their documents. New users will be given the folder group My Folders and the folder My Documents when they first log in to their iThenticate account.

Creating a New Folder Group	
1. Log into your iThenticate account and on the Folders page click on the *New Folder Group* link in the Info/Action Column	New folder New Folder New Folder Group
2. In the Create A New Folder Group window enter a name for the new folder group and then click the *Create* button	Name: * A New Folder Create Cancel
3. Now you have an empty folder group. Within the new folder content tab *Folders*, click on the link *Create a folder* to add a folder to this folder group. To delete an empty folder group, click on the *Remove this empty group* link	**This group is empty** Create a folder Remove this empty group
4. If you clicked on the *Create a folder* link, the Create A New Folder window will open. Enter a name for the folder in the *Folder Name:* field	Folder Name: * New Document Folder

Creating a New Folder Group	
5. Click within the check box for either *Exclude quotes* or *Exclude bibliography* or both to exclude them from comparison for all documents submitted in this folder	*Check to exclude quoted text from comparison of docun* ☐ **Exclude quotes** *Check to exclude bibliography from comparison of docu,* ☐ **Exclude bibliography**
6. Choose which collections to search.	**Limit searches to these repositories:** * *Documents submitted in this folder will search checked repositories.* ☑ **CrossCheck** ☑ **Internet** ☑ **Publications**
7. Click *Create* to create the new folder	Create Cancel

Folder groups that already have a folder created in it will need to create a new folder in a different way.

Creating a New Folder	
1. Log into iThenticate and then click on the *New Folder* link within the Info/ Action Column	New folder New Folder New Folder Group
2. In the Create A New Folder page, the user must first specify which folder group they would like to save this new folder to by using the *Folder Group:* pull-down menu to select the folder group destination	**Folder Group:** * Select Folder Group ▾ Select Folder Group - - - - - - - - - - My Folders New Folder
3. Enter a name for the folder in the *Folder Name:* field	**Folder Name:** * New Document Folder
4. Click within the check box for either *Exclude quotes* or *Exclude bibliography* or both to exclude them from comparison for all documents submitted in this folder	*Check to exclude quoted text from comparison of docun* ☐ **Exclude quotes** *Check to exclude bibliography from comparison of docu* ☐ **Exclude bibliography**

Creating a New Folder	
5. Click the check box for the Exclude Phrases option to exclude previously added phrases from documents submitted to this folder For information on how to add phrases for exclusion to a folder or an account please view the phrase exclusion section of this manual.	*Check to exclude phrases associated ι this folder* ☐ **Exclude Phrases**
6. The Exclude Small Matches option provides the ability to exclude match instances from the Similarity Report that are below the set word count threshold. Click on the check box next to Exclude Small Matches option, then enter a number into the word count field to exclude every match instance below the set threshold	*Check to exclude match instances from reports that are below the set word c* ☑ **Exclude Small Matches** ┌─ **Set match exclusion threshold:** ─┐ Exclude all match instances below the set threshold from reports. Word Count: [0] words
7. The *Exclude Small Sources* option provides the ability to exclude sources from the Similarity Report that are below a set threshold of either word count of aggregate match percentage. Click on the check box next to the *Exclude small sources* option, then enter a value into either the *Word Count* or the *Percentage* fields*	☑ **Exclude Small Sources** ┌─ **Exclude Sources by:** ─┐ Based on a source's total match percentage or match word count. ◉ Word Count: [0] words ○ Percentage: [0] %
8. The *Exclude Sections* options provides the ability to exclude the Abstract and Methods and Materials sections from Similarity Reports. Click on the check box next to the *Abstract* or *Methods and Materials* to exclude those sections from the Similarity Report**	**Exclude Sections:** • *Check to exclude the Abstract from comparison of documents submitted to* ☐ **Abstract** *Check to exclude the Methods and Materials section from comparison of doc Methods* ☐ **Methods and Materials** *Set to "no" if you do not want documents uploaded to this folder searchable*
9. Choose which collections to search.	┌─ **Limit searches to these repositories:** * ─┐ *Documents submitted in this folder will search checked repositories.* ☑ **CrossCheck** ☑ **Internet** ☑ **Publications**
10. Click *Create* to create the new folder	**Create** Cancel

⚠ ***Warning**: If large documents are going to be uploaded to a folder and matches are excluded by a percentage threshold, even a set percentage of 1% exclusion may exclude very large matches. For example, if a 120 page document is uploaded to the system and the exclusion is set by percentage, it is possible that a full page of unoriginal material will be excluded from a report. It is important to keep in mind the size of the documents being submitted to a folder when using the percentage exclusion for the customize match size option.

📄 ****Note**: Currently section exclusion may not work properly if documents contain:
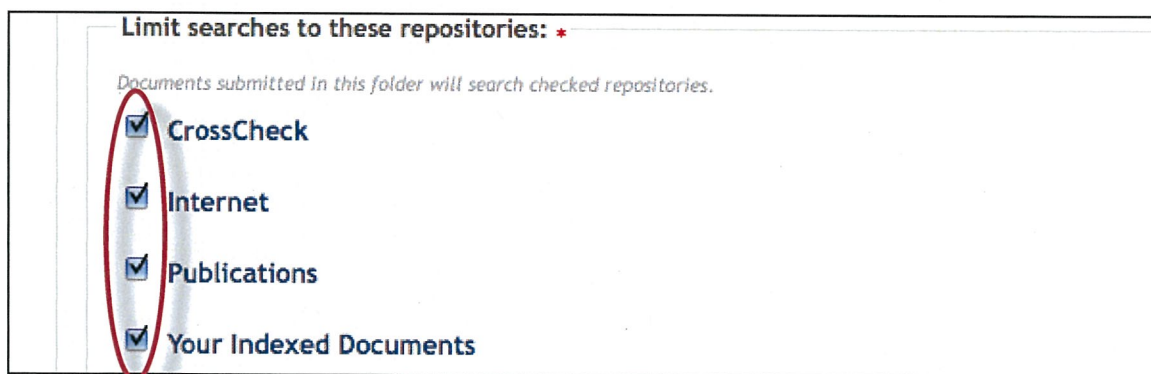- Watermarks
- Unevenly spaced line numbering
- Sub-headings that are indistinguishable from the Methods and Materials heading
- Abstract or Methods and Materials section appear within a table
- Section heading and body text use the same font, font size, and font treatment

Please visit this site for more information about section exclusion functionality:
http://www.ithenticate.com/products/whats-new/

Database Sources for Similarity Reports

The user is able to select the available database sources to compare submissions against. Within the folder settings or when a folder is created the user can select which database collections will be searched. To search specific databases when documents are submitted to the folder click within the check boxes next to the databases to select them. If no databases are selected with a check next to their corresponding check box, then all databases will be searched when a document is submitted to this folder.
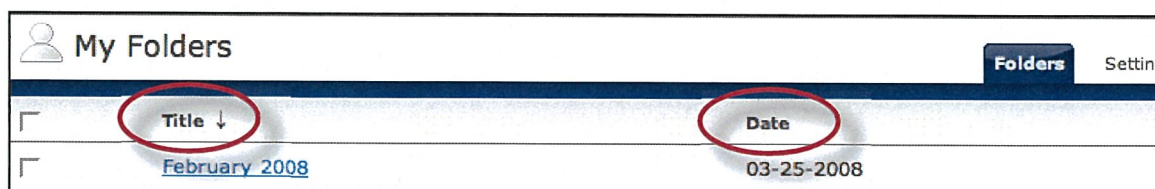

The currently available search indexes are:

- **CrossCheck** - research articles, books, and conference proceedings provided by the worlds scientific, technical and medical publishers

- **Internet -** a database of archived and live publicly available internet pages containing billions of pages of existing content and tens of thousands of new pages added daily

- **Publications -** third party periodical, journal, and publication content including many major professional journals, periodicals, and business publications

- **Your Indexed Documents -** clients have the ability to create their own customizable database within their account to compare against

  📄 **Note**: If you would like to purchase the option to create a customizable database source with your own content to submit to and search against, please contact sales@ithenticate.com

Organizing Folders

Folders in the directory are organized alphabetically. When a folder has been clicked the folder content appears in the main content area of the page. The user has the option to organize the folders within a folder group by either title or date. To sort the folders by title or date, click on the *Title* or *Date* headers of the column.
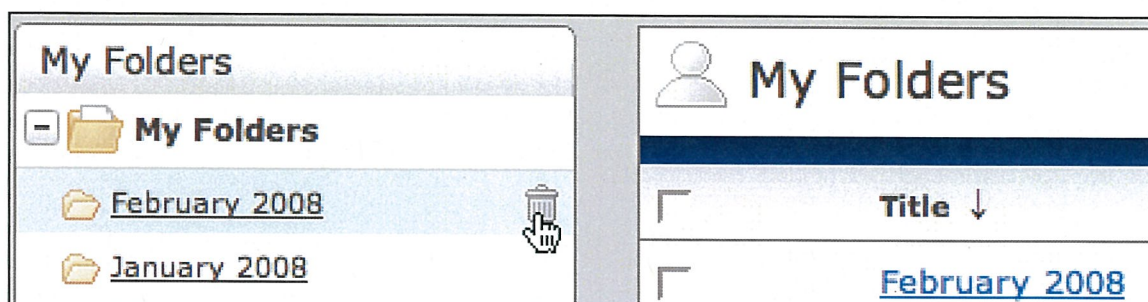

To move folders to another folder group click on the check boxes to the left of the folder's name to place a check into the check boxes. Once a check has been placed, users are then able to use the *Move selected to...* pull-down menu and once the correct folder group has been selected, the user can click on the *Move* button to move the selected folders.

Moving folders	
1. Click on a folder group that contains folders that are going to be moved to a new folder group	
2. Click on the check boxes next to the name of the folders to add a check to the folders that the user wishes to move	
3. Use the *Move selected to...* menu to select the desired folder group destination of the checked folders	
4. Click on the *Move* button to move the folders to the new folder group	

Deleting Folders

Folders can be deleted in two ways: from the directory or from within the main content area. To delete a folder from the directory simply click on a folder group and hover the cursor over the folder that the user wants to delete and two icons will appear: a refresh icon and a trash icon. Click on the trash icon to delete the folder.

The other way to delete folders is from the main content area after a folder group has been selected.

Deleting a folder or multiple folders from a folder group	
1. Click on the folder group that contains the folders that the user wants to delete	
2. Place a check mark next to each folder that the user wants to delete by clicking in the empty check boxes to the left of the folders name. To select all folders, place a check in the check box next to the *Title* column header	
3. Click on the *Trash* button on the toolbar to send all checked folders to the Trash	

Folder Tabs

Within every folder there are four tabs that contain different folder options. They are:

- **Documents** - this tab contains all the documents that have been submitted to the folder. The documents tab also contains the Similarity Reports for the submitted documents

- **Sharing** - this tab allows you to share this selected folder with other iThenticate users who have been added to the iThenticate account

- **Settings** - this tab contains the folders options which you can adjust at any time