

AVEDAS AG

Training material:

Quick Guide for Department Validators

For:

Universidade Nova de Lisboa

Ana Ramos Falcão

From:

AVEDAS AG

Dominik Smasal

Date: 14.01.2011

Document version: 1.2

CONVERIS version: 4.3

AVEDAS AG

Karlsruhe | Stockholm | London

Waldstrasse 65

DE-76133 Karlsruhe

GERMANY

Amtsgericht Mannheim HRB 110904

Phone: +49 721 3 54 90 0

Fax: +49 721 3 54 90 29

Web: www.avedas.com

Table of Contents

1. Login.....	2
2. Startpage.....	3
3. Things to Do: Validate a Publication (List View)	5
4. Things to Do: Validate a Publication (Edit Page).....	7
5. Publications: Add New	11
6. Publications: List View	12
7. Adding or editing other entities (Research Activities, patents).....	14
8. Research activities: List View	15
9. Initial tasks	15

1. Login

Please direct your browser to the following URL: <http://converis.unl.pt>

You will then get to the following login screen:



Figure: Login screen.

You can log in by entering your username and password and clicking on “Login”.

2. Startpage

The screen shot below illustrates the startpage you see once logged in.



Figure: The startpage for a department validator.

The main sections of the startpage are described below.

(1) Header area

By clicking on the CONVERIS logo (the globe) to the left or on the text “Startpage” in the upper right corner, you will get back to the Startpage from any other page in the system.

“Help” provides you with basic help information and support documentation.

If you click on “Logout”, you will be logged out from the system. In order to login again, follow the instructions as described in section ‘Login’.

(2) Tabs

Below the header, you have access to a set of tabs. Each tab gives access to additional functionality:

- **Dashboard:** Graphs illustrating the number of items over time and pie charts illustrating the number of items in each step of the workflow.
- **Actions:** An overview of all types of information you have access to in your profile. Depending on your user rights, you can for each type of information add a new item and/or go to the corresponding list view.
- **Reports:** Access to a set of reports you can generate based on the data in your profile.
- **Administration:** Access to administrative functions such as editing your personal settings.

(3) Profile box

A profile box displays some key information on you as a user.

(4) Welcome text

The welcome text can only be modified can by system administrators and can be used for example to inform all users about upcoming events.

(5) Research activities

Within the 'Research activities' section you are given the functionality to either edit or add new research activities within your organisational unit.

(6) Things to do

Within the 'Things to do' section you are presented with a list of activities for which you need to take action.

(7) Favourite actions

Items that appear within the 'Favourite actions' box are selected from 'My Settings' which can be found by clicking on the 'Administration' tab. From here you can choose which items should appear within your 'Favourite actions' box.

(8) Favourite reports

When you have done a selection for a report you can save that report as a template and indicate if it should be displayed directly on the startpage in the box 'Favourite reports'.

(9) 'Add new' and 'List all'

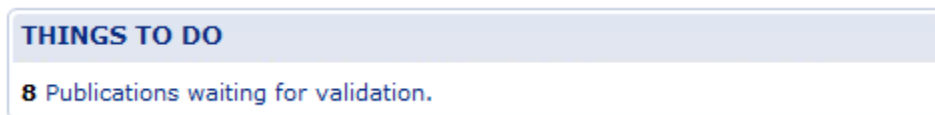
The area below the profile box displays an overview of the key types of information you have access to in your profile. Under 'My settings' on the Administration tab you can make changes to which types of information you want displayed on the startpage.

By clicking on 'Add new', you will be presented with the different alternatives for adding a new item. For certain types of information you get directly to the edit page for a new item.

By clicking on the icon, title or 'List all' in the box, you will get to the 'List view' of the selected type of information. The list view presents a list of all current items in your profile for the selected type of information.

3. Things to Do: Validate a Publication (List View)

Once a publication has been entered in the system and the status has been set to 'Validate by Department' you will be notified in the 'Things to Do' section when you login into CONVERIS.



The departmental validator currently has publications waiting for validation

Once you have clicked the link as shown above you will be presented with the 'List View'. In the List View, you get an overview of all the items requiring departmental validation. In the list view you can do the following:

- Find a specific item you would like to edit
- Find a specific item you would like to review / validate
- Indicate which items you would like to make available over the public web
- Export selected items

By clicking on the individual publication titles, you are presented with the edit page for that publication. An example of the list view for departmental validators is shown below:



The screenshot shows the 'List of Publications' interface. At the top, it indicates the user is logged in as a 'Departmental Validator'. The main area contains a navigation bar with 'Add new Publication' (1), a filter section (2) with options for Status, Publication type, Author, and Journal, and search controls (3). Below the filter section, there are options to 'Save filter' (4), 'Restore filter settings', 'Reset filter', and 'Short view'. The main content area shows '1 items found' and a table of publications. The table has columns for 'Title (Authors)', 'Publication type', 'Publication date', 'Status', 'Public', 'Updated on', and 'Actions' (6). A single publication is listed: 'A Study into Management and Human Perception of Enforced HR Policies.' by '(F Blogs)', categorized as 'Article in Journal', with a status of 'For validation by Department' (No) and a date of '05/11/2010'. At the bottom, there are options to 'Change visibility', 'Export', and 'Relate: Authors' (7).

Figure: List view of Publications.

(1) Add new

By clicking on 'Add new', you will be presented with the different alternatives for adding a new item. For certain types of information you get directly to the edit page for a new item.

(2) Filtering

You can limit the list by filtering on different criteria. You do this by clicking on the corresponding headings after 'Filter by'. A default filter of Status = Validate by Department has been specified and should not be removed. The figure above also shows a filter on Author and is set to return only publications authored by 'F Blogs'.

If you want to store your filter settings, you can do so by clicking on 'Save filter'. Any of the filters that you have saved can be reapplied by clicking on 'Restore filter settings'.

By clicking on 'Reset filter', you will get back to the complete and unfiltered list.

(3) Search

If you know what specific item you are looking for, you can search for a specific keyword in the title by adding search term(s) in the search field in the first column and click on 'Search'.

By clicking on 'Clear', you will get back to the complete and unfiltered list.

(4) Items displayed per page




You can limit the length of your list to 10, 25, 50 or 100 items per page. If the selected type of information has more items than the number of items you want to have displayed on each page in the list view, you can move forward and backward between the pages by clicking on the arrows above the last column.

(5) Sorting

All columns with blue headings are clickable in order to sort the list accordingly. If you want the list to be displayed in reverse sort order, just click on the blue heading once more.

(6) Actions

In the last column, you can carry out the following actions:

-  **Edit:** By clicking on the pen icon, you are presented with the item's edit page. This is also possible by clicking on the item's title in the first column.
-  **Preview:** If you only want to view a certain item without editing it you can click on the eye symbol.
-  **Confirm or Reject relation:** The icon with a tick allows you to reject the relation of author to publication.

(7) Batch editing

At the bottom of the list, you can carry out actions on all the items you select in the list. You select the items by clicking the corresponding check-boxes at the beginning of each row. To select all items in the list you start by maximising the number of items that are displayed by clicking '100' (see point 4). You can then click the checkbox at the very top of the list (next to 'Title (Authors)') and step through all the pages.

To carry out any of the actions (change visibility, export) you click on the corresponding link and follow the instructions on the screen.

4. Things to Do: Validate a Publication (Edit Page)

Below follows an explanation to all key information you need for amendment and validation of publications. You are recommended to review and if necessary amend any information prior to validating the publication.

Non-validated: Payment for participation in research: a pursuit for the poor?

1 KEY INFORMATION

2 Publication type: *
Article, letter or review in peer-reviewed journal

3 Title: *
Payment for participation in research: a pursuit for the poor?

4 Author validation:
1. Smødal, Denmark
FACULDADE DE CIÊNCIAS E TECNOLOGIA (PCT)

5 JOURNAL INFORMATION
Title:
Journal Of Medical Ethics (2006-6000)

6 PUBLICATION INFORMATION
Submission date: [date] Acceptance date: [date]
Publication date online: [date] Publication year: * 2010

7 Upload full text:
No file uploaded. Please click 'upload' to add a file.

8 Workflow status:
 Non-validated
 For validation by D...
 For validation by G...
 Validated

9 Save

Figure: Example of an edit page for a publication.

(1) Publication type

If you want to change the publication type you click on 'Change' and then select the type of publication from a pull-down list. Each publication type has its own edit page as the attributes and relations may be slightly different. The diagram above shows the edit page for publication type 'Article in Journal'.

(2) Title

Check the title in this field. If you do any corrections through copy and paste the formatting is automatically removed, and if you want any formatting (subscript, superscript, italic or special characters) you can add that directly in the field through the corresponding editing symbols.

If you add a new publication manually, you can click on 'Search in online sources' as soon as you have entered (parts of) the title to check if the system is able to find the publication in any of the connected online publication databases. If you do, you mark the item and confirm. All available attributes and relations are then pre-filled for you.

(3) Authors

The text field 'Authors' is where you type / paste in the authors' names as 'Last name First name, Last name First name, etc.'. This field is used for reference lists, e.g. in CVs, exports and over the public web.

As the information on publications is being used for reports, researchers are also asked to add the internal authors as relations to the publication. This enables reports for individuals, but also for all internal organisational units. External organisations may also be included, e.g. to highlight collaborations with highly ranked institutions. Ensure that all author names are spelt correctly.

The main business card of the researcher (i.e. the first business card in their person profile) is automatically related to the publication. The names in the author field are checked by the system and if there are any matches, they are displayed on the 'Lookup' tab (this function has been put in place for publications that are imported. For all (internal) authors not found on the lookup tab, you search for them by typing in the name and click on search on the 'Search' tab, or you can look for the name over the 'A to Z' tab. You click on 'Add' for all authors that should be related to the publication.

(4) Indexation

A publication is considered "international" if it is indexed in one of the listed reference databases. If a publication has been indexed in one or more of the databases given, the researcher and/or department validator should choose "international", otherwise "national".

Below, please tick all the boxes for the respective reference databases the publication can be found in.

(5) Journal

In the same way as you can search for authors, you can search for journals and add the correct one to the publication. This automatically associates a set of further information with the publication, e.g. the ISSN number and the journal's copyright policy which is used by Library to ensure that the full-text is handled in a correct way. If the policy is available, it can be displayed by clicking on 'Show policy'.

Apart from the journal itself, you need to ensure that the fields for volume, issue, start page and end page are correct thus ensuring the reference information is complete.

(6) Publication information

In this section you need to include the publication date (in print or online) once the publication has been published. Ensure that publication data is correct.

(7) Full-text

Please check the uploaded file, to ensure that the correct version is included, e.g. the accepted version (usually post-refereed, final draft). To include the DOI, please click on 'Lookup DOI' and then confirm if the correct match was found. The DOI provides a link to the publisher's version of the full-text.

(8) Workflow status

Once you have reviewed and amended any necessary data, you need to set the workflow status to "For validation by Library" and click "Save" (see point 9). Once the workflow status has been set to "For validation by Library" you will no longer have the ability to edit the publication.

(9) Actions

By clicking on any of the buttons at the bottom of the Edit page, you can carry out the following actions:

- Back: Go back to the previous section.
- Cancel: Discard all changes you have made and go back to the list view.
- Preview: Check what the preview will look like including key information on the item.
- Save: Save all your changes and go back to the list view.
- Next: Go to the next section.

5. Publications: Add New

The departmental validator is also able to add new publications to the system. There are four main ways to add publications in the system.



Figure: Four ways for adding new publications.

(1) Add manually

To add a publication manually, click the type of publication you would like to enter. You will then get to the edit page where you are asked to fill in key information on the publication you want to enter. Please refer to section 4 for further information with regards to the edit page.

(2) Import from online publication databases

If publications are available in any of the connected online publication databases (Web of Science and PubMed) you can search for them through the system. The publications you select will be directly imported for you.

(3) Import from file

If publications are available in any of the supported reference formats (BibTeX, EndNote (X1/X2, Tag), Reference Manager (RIS) or RefWorks) you can upload a file to the system. The publications you select from each file will be directly imported for you.

(4) Search profiles

To facilitate the entry of your future publication records you can set up one or several search profiles. The search profiles include key information you would like to search for in order to find publications in the online publication databases. In this way you can for example include a last name and affiliation, as soon as the system finds any matching publications you are informed by email. This time saving feature will ensure you are alerted to newly imported publications matching your original search criteria.

6. Publications: List View

Please see section 0 for an overview of the 'List View' page. In the list view, you get an overview of all the items you have in your profile for each type of information. In the list view you can do the following:

- Find a specific item you would like to edit
- Find a specific item you would like to review / validate
- Indicate which items you would like to make available over the public web
- Export selected items

By clicking in the first column on the title of any of the items, you get to the edit page for that item if you have edit rights and to a preview page if you do not have edit rights.

In the following, the list view and its functionality are presented based on publications.



Logged in as: Researcher [Smasal, Dominik] STARTPAGE | HELP | LOGOUT

List of Publications

Startpage » Publications

1 Add new Publication

Filter by: Status | Publication type | Author | Journal **2**

Save filter | Restore filter settings | Reset filter | Short view **4**

20 items found | Unselect all Publications per page: 10 | 25 | 50 | 100 << < 1/2 > >>

<input type="checkbox"/> Title (Authors) 3	Publication type 5	on date	Status	Public	Updated on 6	Actions
<input type="checkbox"/> Internet-Zahlungssysteme aus Sicht der Verbraucher (Krüger, M;Leibold, K;Smasal, D)	Article in Journal		Non-validated	No	14/10/2010	  
<input type="checkbox"/> Internet payment systems in Germany 2006 - the customers' view (Kruger M,Leibold K,Smasal D)	Article in Journal		Non-validated	No	13/10/2010	 
<input type="checkbox"/> Aspects of traumatology in ice hockey (Pforringer W, Smasal V) 7	Article in Journal	31-Dec-1987	Non-validated	No	11/10/2010	 

Change visibility | Export

Figure: List view of Publications.

(1) Add new

By clicking on 'Add new', you will be presented with the different alternatives for adding a new item. For certain types of information you get directly to the edit page for a new item.

(2) Filtering

You can limit the list by filtering it on different criteria. You do this by clicking on the corresponding headings after 'Filter by'. You can for example click on 'Status' and in the popup select the different workflow statuses that the list should be limited to.

If you want to store your filter settings, you can do so by clicking on 'Save filter'. Any of the filters that you have saved can be reapplied by clicking on 'Restore filter settings'.

By clicking on 'Reset filter', you will get back to the complete and unfiltered list.

(3) Search

If you know what specific item you are looking for, you can search for a specific keyword in the title by adding search term(s) in the search field in the first column and click on 'Search'.

By clicking on 'Clear', you will get back to the complete and unfiltered list.

(4) Items displayed per page




You can limit the length of your list to 10, 25, 50 or 100 items per page. If the selected type of information has more items than the number of items you want to have displayed on each page in the list view, you can move forward and backward between the pages by clicking on the arrows above the last column.

(5) Sorting

All columns with blue headings are clickable in order to sort the list accordingly. If you want the list to be displayed in reverse sort order, just click on the blue heading once more.

(6) Actions

In the last column, you can carry out the following actions:

-  **Edit:** By clicking on the pen icon, you are presented with the item's edit page. This is also possible by clicking on the item's title in the first column.
-  **Preview:** If you only want to view a certain item without editing it you can click on the eye symbol.
-  **Confirm or Reject relation:** The icon with a tick allows you to reject the relation of author to publication.

(7) Batch editing

At the bottom of the list, you can carry out actions on all the items you select in the list. You select the items by clicking the corresponding check-boxes at the beginning of each row. To select all items in the list you start by maximising the number of items that are displayed by clicking '100' (see point 4). You can then click the checkbox at the very top of the list (next to 'Title (Authors)') and step through all the pages.

To carry out any of the actions (change visibility, export) you click on the corresponding link and follow the instructions on the screen.

7. Adding or editing other entities (Research Activities, patents)

CONVERIS has already been pre-filled with research activities / projects with UNL participation. New or missing entries for research activities or patents can be entered manually in the same fashion publications and all other entities are entered into CONVERIS. Incomplete entries or mistakes can be updated by entering the edit page which is fashioned in the same design as the publications edit page.

Please see section 4 for an overview of the 'Edit View' page.

Research activities are divided into the following logic sections to represent attributes and relations needed:

- (1) Key information: name, acronym, funding, start & end date etc.
- (2) Project members: UNL internal members.
- (3) Funding body: UNL specific funding sources, funding scheme and call.
- (4) Areas, files, pictures: UNL specific scientific areas, documents, pictures.
- (5) Organisations, sub-projects: principal organisation, related organisations and projects.
- (6) Publications, patents: existing publications and patents can be linked as a project outcome.
- (7) Status: update information of entry.

Patents are divided into the following sections:

- (1) Key information: Title, patent status and numbers, description.
- (2) Patent owners, application: UNL internal patent holder(s), external holder organisations etc.
- (3) Scientific area(s): UNL specific scientific areas, keywords.
- (4) Related publications: existing publications can be linked.
- (5) Illustrations: patent documents and illustrations.
- (6) Status: update information of entry.

8. Research activities: List View

Please see section 0 for an overview of the 'List View' page. In the list view, you get an overview of all the items you have in your profile for each type of information. In the list view you can do the following:

- Find a specific item you would like to edit
- Find a specific item you would like to review / validate
- Indicate which items you would like to make available over the public web
- Export selected items

By clicking in the first column on the title of any of the items, you get to the edit page for that item if you have edit rights and to a preview page if you do not have edit rights.

9. Initial tasks

When you start using the system, we recommend you to carry out a set of tasks in the order given below. The reason for this is that data on you and your activities and results have been migrated from legacy systems where the data has been of lower quality than we want to establish in CONVERIS.

(1) Check your validation lists

Within the 'Things to Do' section ensure that you check and validate all publications awaiting validation. It is of particular importance that you ensure author names are spelt correctly and external organisations are present against the publications. You should populate any missing data.

(2) Enter publications into the system

If you have publications which need to be entered into the system you should do this now. Once you have entered all the details you should set the status to 'For validation by library'.

(3) Set up search profiles

Once you have completed and validated all your currently published publications, you are encouraged to set up one or several search profiles (see section 7(4) in this guide).

If you have any questions or need assistance please contact the CONVERIS help desk by email to: converis.help@unl.pt.