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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.

FCT users can log in using their UNL FCT user account. All other users will use their assigned user name and password. You can log in by entering the respective 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 researcher.

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:

- **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. By clicking on "Edit my profile", you can edit your own staff profile, including:

- Key information such as your name and research interests
- Upload files like your CV or a profile photo
- Add or edit your organisational affiliations / business cards

(4) Welcome text

To the right of the profile box, a welcome text is being displayed. The text can be modified by system administrators and can be used for example to inform all users about upcoming events.

(5) 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.

Note:

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'.

(6) '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. Add new: Publication

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. The edit page is further described in section 5 in this guide.

(2) Import from online publication databases

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

(3) Import from file

If any of your publications are available in any of the supported reference formats (BibTeX, EndNote (X1/X2, Tag), Reference Manager (RIS)) 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 your publications in the online publication databases. In this way you can for example include your last name and affiliation, as soon as the system finds any matching publications you get informed by email. This time saving feature will ensure you are alerted to new publications matching your original search criteria without having to access the system. (the periodicity of email notifications can be set on the Administration tab, My settings, Email notifications)

4. List view

An example of the list view can be seen in the illustration below. 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
- 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.

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 get to the item's edit page. This is also possible by clicking on the item's title in the first column. Note that this action is only available for items that have the status 'Non-validated' and that you have added yourself.

- **Preview:** If you only want to view a certain item without editing it you can click on the eye symbol. If you do not have edit rights, but discover anything that needs to be corrected, you can in the preview page click on 'Request change' to inform an administrator. In the preview page you can also generate a PDF document of the information.

- **Delete:** By clicking on the red cross icon, the item will be archived. This is only possible to do for items that you have just added. If you logout and login again, it will no longer be possible to delete these items. SuperAdmins can both delete archived items permanently from the system or restore items that have been archived by mistake.

- **Confirm or Reject relation:** The icon with a question mark serves to enable you to validate whether the item is yours or not. As other users can relate you as a co-author to a joint publication, they may make mistakes thus you have the ability to either confirm or reject the item as yours ensuring that data in the system is accurate.

(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 (export, set status) you click on the corresponding link and follow the instructions on the screen.

5. Edit page

The edit page displays the details of each item in the form of attributes and relations. The content varies between the different types of information, but they all follow the same structure and way of working with the information.

Below follows an explanation to all key information you need to review / enter for a new publication. If you need further assistance while entering your data, you can click on any of the question marks in order to access help texts for the corresponding section in the edit page.

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.

(2) **Title**

Include the title in this field. If you do that through copy and paste all 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.

Once you have added the title, you can click on 'Search in online sources' to check if the system is able to find your 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 and exports.

As the information on publications is being used for reports, you 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. You may also include external organisations, e.g. to highlight collaborations with highly ranked institutions.

You get your main business card (i.e. the first business card in your person profile) 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 you import, i.e. if you add a publication manually the lookup tab only serves its purpose if you save your publication and then re-open it). 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 in reference databases**

If the publication is indexed in one or more of the databases given, please choose "international", otherwise choose "national".

Below, please tick at least one of the databases the publication is indexed to. If you chose "national", please tick "none".

List of reference databases:

- ACM Digital Library   - Compendex

- EconLit   - ERIH (only international)

- IBSS   - IEEE XPlore

- PubMed   - Scielo

- Scopus   - Web of Science

- None

(5) Journal

In the same way as you can search for authors, you can search for journals and add the correct one to your 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 fill in the fields for volume and pages range to ensure that the reference information is complete.

(6) Publication information

In this section you need to include the publication year.

(7) Full-text

Please upload the accepted version (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 entered all required information, you need to set the workflow status to "For validation by Department" and click "Save" (see point 9). You will no longer be able to edit the publication record.

(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.

6. 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 that 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 list of publications

Go to your list of publications. Please check that the publications listed are yours. You need to confirm or reject each publication by clicking the icon. When you are ready, all icons should have a green check mark .

(2) Complete your profile

Once you have checked and validated all publications already in your profile, you should complete your profile by including any missing publications. Please, do that in the following order:

- Search in the online publication databases directly through the system (see section 3(2) in this guide).
- Import publications you may have on file in any of the supported formats (see section 3(3) in this guide).
- Manually add publications (see section 3(1) in this guide).

If you do it in this order, you will minimise the work required to complete your profile.

(3) Validate your publications

When reviewing / validating the recorded information on your publications, please ensure that the following information is correct:

- **Publication type**
- **Internal authors**
- **Indexation in reference databases**
- **Title**
- **Journal** (or corresponding information for other publication types)
- **Volume, pages range** (or corresponding information for other publication types)
- **Publication year**
- Uploaded **full-text** file (final accepted version)

As soon as all this information is correct, set the publication record to '**For validation by Department'** and click on **Save**. In this way both reference information as well as reporting will be correct.

Once you have sent the publication for validation, the co-authors you have added will make the validation as described in step (1) above, the 'Department validator' will check that the correct authors have been added, and in the following step 'For validation by Library' the Library will check that the full-

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text is handled in line with the journal's copyright policy. Hence, in all other steps of the validation workflow, you do no longer have any edit rights to the publication.

If you discover any information that is incorrect for a record you cannot edit, click on 'Request change' on the Preview page.
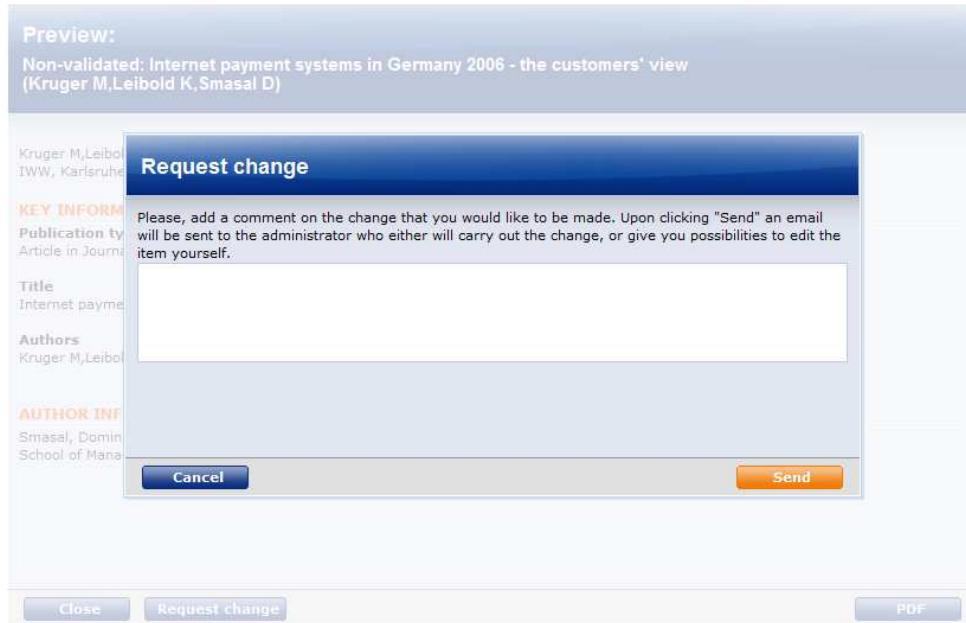

Figure: 'Request change' enables you to inform the administration of any incorrect information for your publication records, if you do not have any edit rights yourself.

(4) 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 3(4) in this guide).