

## Admin and Workgroup Editor Guide

### Introduction

This guide will introduce you to advanced functionality only available to Administrators and Workgroup Editors. Some features are only available to Administrator's; this will be noted under the section title.

Some features are only available to Networked level subscribers. As with Administrator only features, this will be noted under the section title. If you are not sure what your level of functionality is, contact us at [clientservices@researchresearch.com](mailto:clientservices@researchresearch.com)

### Creating, Editing, Deleting Users

#### (Administrators only)

To manage your users, go to the 'Institution home' in the 'Our institution' section

*To create a user:* Select 'New user' from the 'Actions' dropdown. Fill out the sections of the profile marked with \*. Click **Create** at the bottom of the page to create the user; they will be automatically emailed with their login details.

*To edit a user:* Click on the 'People' tab. Search for the user you want to edit using their name or email address. If you can't find them, change the search dropdown from 'This group only' to 'Whole institution'. Click on the user's name to view their profile, then click **Edit profile** under their email address to edit their details.

*To delete a user:* Click on the People tab. Search for the user as described above. Click **Delete** to delete their profile permanently.

### Creating Workgroups

#### (Administrators only)

#### (Networked only)

Workgroups are structured like a tree diagram. Each Workgroup has a parent group (with your main institutional page at the top), and each Workgroup can have any number of sub-groups.

To create a new Workgroup:

- Go to the 'Institution home' in the 'Our institution' section
- On the right-hand side of the page, select the parent group for your new Workgroup from 'Our Hierarchy'
- When the parent group opens, click the **New** button. In the pop-up, enter the full name, shortened name and a description for your new Workgroup.
- Click **Save** in the pop-up to create your Workgroup

### Editing Start Pages

You can edit the full name, shortened name and description of your Workgroups

- Go to the 'Institution home' in the 'Our institution' section
- On the right-hand side of the page, select the Workgroup you wish to edit from 'Our Hierarchy'

- When the Workgroup opens, click the **Edit** button. Make the desired changes in the pop-up window
- Click **Save** to confirm your changes

## Shared Resources

You can post pre-created searches and folder of bookmarks (for either funding or news) on Workgroup Start Pages for other users to access.

To share a search:

- In the Funding or News section, create a search as described in the Research Professional User Guide and click **Save**
- In the pop-up window, click the 'Our institution' tab
- Select the Workgroup you want the search to be posted to.
- Either enter a name for your search, or select an existing search to save over
- Click **Save** to post the search to your selected Workgroup

To share a folder of bookmarks:

- In the Funding or News section, select items to bookmark as described in the Research Professional User Guide and click **Bookmark**
- In the pop-up window, click the 'Our institution' tab
- Select the Workgroup you want to post the bookmarks to
- Either enter a name for your folder of bookmarks, or select an existing folder to add the items to
- Click **Save** to post your bookmarks to the Workgroup

## Managing Group Membership

### (Administrator's only)

You can control which users at your institution are members of which Workgroup, and the level of privileges they have (Member, Workgroup Editor, Administrator)

- Go to the 'Institution home' in the 'Our institution' section
- On the right-hand side of the page, select the Workgroup you wish to manage membership for
- Click on the 'People' tab
- Search for the user you want to edit using their name or email address. If you can't find them, change the search dropdown from 'This group only' to 'Whole institution'
- Click on the user's name to view their profile, then open the dropdown under their email address to adjust their membership status

Note: Users given Administrator or Workgroup Editor rights will have those rights in the Workgroup you are currently in and all of its sub groups

## Emailing Workgroups

You can email links to searches, folders of bookmarks or individual items (from either the Funding or News sections) to all members of selected Workgroups.

- Run a search, open a folder of bookmarks, or select several items in a list of search results
  - *To email a search:* Click the **Email** button to the right of the search title, or select 'Email' from the actions dropdown
  - *To email a folder of bookmarks:* Click the **Email** button to the right of the folder's title
  - *To email selected items:* Select 'Email' from the 'Actions' menu at the top of the list of search results
- In the pop-up window, select the Workgroup you wish to send the search/bookmarks/items to
- Enter any message you want to accompany the item links in the 'Message' section
- Click **Send** to send your links

Note: When emailing to Workgroups, you do not need to fill out the 'To', 'CC' or 'BCC' fields (although you can add additional users here if you want to).

## Usage Reports

### (Administrators only)

You can generate usage reports to monitor activity from members of individual Workgroups, collections of Workgroups or across the entire institution

- Go to the 'Institution home' in the 'Our institution' section
- On the right-hand side of the page, select the Workgroup you wish to generate a report for (an institution summary can be generated from any Workgroup)
- From the 'Actions' menu, select 'View reports'
- In the pop-up, select your desired report in either XLS or PDF

## Annotations

### (Networked only)

You can annotate funding opportunities, to add additional information such as internal deadlines or internal contact people. This information will be visible to any users from your institution who view that opportunity

- In the Funding section, run a funding search and then select the items you wish to annotate from the search results by checking the boxes next to their closing dates
- From the 'Actions' menu at the top of the search results, select 'Annotate'
- In the pop-up window, select the type of annotation you wish to apply
- Enter the required information for your annotation type, then click **OK** to add the annotation

- Click **OK** again to close the pop-up window. Your annotation will now be displayed in full descriptions of the selected items

## Magazines


### (Networked only)

You can create institutional Magazines, containing funding opportunities and news articles drawn from elsewhere on the site. You can email a Magazine to selected individuals, or to all members of relevant Workgroups.

To create a Magazine:

- Go to 'Magazines home' in the 'Our institution' section
- Click the **New** button
- In the pop-up, enter a name and short description for your Magazine, and define the news and funding sections (such as 'Breaking news' or 'International funding')
- Click **Save** in the pop-up to create your Magazine
- You will be taken to your new Magazine's summary page

To create an email list for your Magazine:

- Go to your Magazine's summary page by opening 'Magazines home' in the 'Our institution' section and clicking on your Magazine's title
- Click the **Edit email list** button
- In the 'Users' tab, search for individuals you wish to receive this Magazine. Click  to add them to the distribution list
- In the groups tab, select any Workgroups you wish to receive this Magazine by checking the box next to the group's title
- Click **Save** to save your changes

Add content to your Magazine:

- Run a search for either funding or news content
- Select the items you wish to add by checking the box to the item's entry in the search listings
- Select 'Add to magazine' from the 'Actions' menu
- In the pop-up, select the Magazine you wish to add the content to. You will then be able to choose to add the content to an existing issue, or to create a new issue
- You can choose to add the content to one of the Magazine's existing sections, or to create a new section
- Click **OK** to add the content to your magazine

Publish and email your magazine

Until you publish an issue of a magazine, it will only be visible to Administrators at your institution. To publish a magazine:

- Go to your Magazine's summary page by opening 'Magazines home' in the 'Our institution' section and clicking on your Magazine's title
- Open the issue you wish to publish and review the content
- Click the **Publish** button to publish the issue. This will make it visible to users at your institution
- After publishing the issue, click **Email** to send the issue as a html email to everyone on the email list