Admin and Workgroup Editor Guide

Introduction

This guide will introduce you to the additional functionality available for users with Administrator and Workgroup Editor rights. Administrators and Editors have different levels of functionality available and some features are only available to Administrators; this will be noted under the section title.

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

Creating, Editing, Deleting Users

(Administrators only)

You can manage users from the **Our Institution** section. From your institutional home page, you have the following actions:

To create a user: open the 'Actions' dropdown and select 'New user'. 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: open 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** to update their details.

To archive a user: open the 'People' tab. Search for the user as described above. Click **Archive** to freeze access to their account.

To delete a user: (user must first be archived) open the 'People' tab. In the dropdown menu select 'Archived users'. Search for the user as described above. Click **Delete** to remove their account from the system.

Editing Start Pages

You can edit the name and introductory text of any of your Workgroups (including your institutional home page). When viewing the Workgroup you wish to edit, click on the **Edit** button to open a pop-up window where you can update the introductory text and edit the title of the page. You can apply basic formatting and insert links into the text using the buttons in the pop-up.

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Shared Resources

You can post pre-created searches and folders of bookmarks (for both opportunities and articles) on Workgroup pages for other users to access. To post either a search or a folder of bookmarks:

1. Create a search or select some items in either the Funding or News section and click the **Save** or **Bookmark** button.

2. In the save pop-up, go to the **Our Institution** tab. You will see a list of all of the Workgroups you are able to post resources on.

3. Select the Workgroup you want to post the resource on.

4. Enter a name for your search or folder of bookmarks (or select an existing resource to overwrite it).

5. Click **Save** The resource will be posted to the Workgroup and will now be visible to any users who view the group.

Creating Workgroups

(Administrators/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. Current workgroups at your institution can be seen on the right-hand side of the page, under the 'Our hierarchy' heading.

To create a new Workgroup:

1. View the parent Workgroup.

2. From the parent Workgroup's start page, click the new button. A pop-up will open, allowing you to give the Workgroup a name and enter introductory text.

3. Click **Save** at the bottom of the pop-up to create your Workgroup. It will now appear listed in the 'Our hierarchy' section.

Managing Group Membership

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

1. View the Workgroup you wish to manage the membership of.

2. Go to the 'People' tab.

3. Search for the user you want to edit using their name or email address.

4. Click on the user's name to view their profile, then use the dropdown under their email address to adjust their membership status. Changes will be saved automatically.

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.

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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.

1. Run a search, open a folder of bookmarks, or select several items in a list of search results.

   a) *To email a search:* Click the **Email** button to the right of the search title, or select 'Email' from the actions dropdown.

   b) *To email a folder of bookmarks:* Click the **Email** button to the right of the folder's title.

   c) *To email selected items:* Select 'Email' from the actions menu at the top of the list of search results.

2. In the pop-up window, select the Workgroup you wish to send the search/bookmarks/items to.

3. Enter any message you want to accompany the item links in the 'Message' section.

4. Click **Send** to email your links.

Create Funding Alerts for Workgroups

Once you have saved a funding search to the start page or workgroup it can be set up as a weekly funding alert for all members of that group.

1. Save a funding search to the workgroup (see Shared Resources).

2. In the workgroup, select 'Create alerts' in the 'Actions' dropdown menu.

3. A pop-up window will appear detailing all the current saved searches on that workgroup.

4. Select the saved searches you want to turn on as weekly funding alerts.

5. Select **Save**

6. The members of that workgroup will now automatically begin to receive that alert in their weekly funding email. They can also adjust it in the 'Email alerts' section of their own personal account.

Generating Usage Reports

(Administrator's only)

You can generate usage reports to monitor activity from members of individual Workgroups or across the entire institution. When generating reports from a specific Workgroup, you will only be able to see information on users who are members of that Workgroup or its sub-groups. When generating reports from the institutional home page, you will have additional reports giving you a summary of usage across the institution.

1. View the Workgroup you wish to generate a report from.

2. Open the 'Actions' drop-down menu, and select 'View reports'.

3. A pop-up will open a list of all the available reports, giving you the option to download each in either XLS or PDF format.

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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 user from your institution who views that opportunity.

1. 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.

2. From the 'Actions' menu at the top of the search results, select 'Annotate'.

3. In the pop-up window, select the type of annotation you wish to apply.

4. Enter the required information for your annotation type, then click **OK** to add the annotation.

5. Once you close the annotations pop-up, your annotation will be displayed in the items description. It will be visible to all users from your institution who view that item.

Expressions of Interest

(Networked only)

Each user at your institution has the option to **Express Interest** in an opportunity; thereby notifying other users at your institution to their interest.

Expressions of Interest can be seen in an opportunity under the **Our Institution** column on the right.

They can also be viewed on the **Our Institution** page; under the **Expressions of Interest** tab of both the Start Page and any other workgroups that the user who 'expressed interest' is a member of.

As an Administrator or Editor you can choose to be alerted the moment any users within your workgroup 'Express Interest'

1. Select the workgroup from the hierarchy on the **Our Institution** section.

2. Click the **Expressions of Interest** tab.

3. Click the **Email me updates** button.

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:

1. Go to the Magazines home page. You can navigate there by clicking the **See all Magazines** button.

2. Click the **New** button.

3. 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').

4. Click **Save** in the pop-up to create your Magazine. You will be taken to your Magazine's summary page.

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To create an email list for your Magazine:

1. From your Magazine's summary page, choose Edit email list from the Actions menu.

2. In the 'Users' tab, search for any individuals you want to receive the Magazine. Click ⊕ to add them to the email list.

3. In the 'Groups' tab, select any Workgroups you want to receive this Magazine. All of the Workgroup's members will be emailed new issues.

4. Click **Save** to commit your changes.

Add content to your Magazine:

1. Run a search for either opportunities or articles.

2. Select the items you wish to add by checking the box next to the item's entry in the search listings.

3. Select 'Add to magazine' from the 'Actions' drop-down next to the 'Bookmarks' button.

4. In the pop-up, select the Magazine you wish to add the content to. You will then be given the option to add the content to an existing issue or to create a new issue.

5. You can choose to add the content to one of the Magazine's existing sections or create a new section.

6. Click **OK** to add the content to your magazine.

Add personalised content to your Magazine:

You are given space in each issue to add additional text and links for your recipients.

1. From the Magazine's summary page, open the issue you want to add text to.

2. Click the **Edit** button under the text box.

3. You can add both a title and information in the two boxes.

4. Click **Save**

Publish and email your magazine:

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

1. From the Magazine's summary page, open the issue you wish to publish and review the content.

2. Click the **Publish** button to publish the issue. This will make it visible to users at your institution.

3. After publishing the issue, click **Email** to send the issue as an html email to everyone on the email list for the Magazine.

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