



# **RMS Profiles**

## **User Guide**

Version 2.1/ Nov 2021

## Contents

Introduction .....	3
How to log into the system .....	4
Home Page-Navigating through the system .....	4
Getting to know the Menu .....	5
Managing your Profile.....	6
How to edit your profile.....	7
Manage Research Outputs.....	9
1. Import Research Outputs.....	9
2. Add Research Outputs .....	9
3. Automatic Claiming.....	13
4. Modify name-based search settings.....	15
5. My Research Outputs page.....	16
6. Merge Records.....	17
7. Split Records.....	18
Manage grants .....	18
Manage professional activities, teaching activities .....	19
Create Links Option.....	21
1. Adding Links .....	21
2. Removing and editing links .....	22
Manage Delegates .....	23
Research Manager Role .....	24
1. What a Research Manager can do? .....	24
2. How to impersonate another user.....	25
3. What a Research Manager can do while impersonating? .....	26
How to log out from the system .....	26

## Introduction

The Research Management System (RMS) comprises RMS Profiles and RMS Grants (accessed separately from UCD Connect).

This is a quick guide for Faculty and Research Managers which covers the main areas of the RMS Profiles system.

RMS Profiles provides a method for recording information on academic profiles. Where available, the information is populated directly from other systems, including Core HR; Banner Student Information System; and RMS Grants. This transfer happens on a nightly basis.

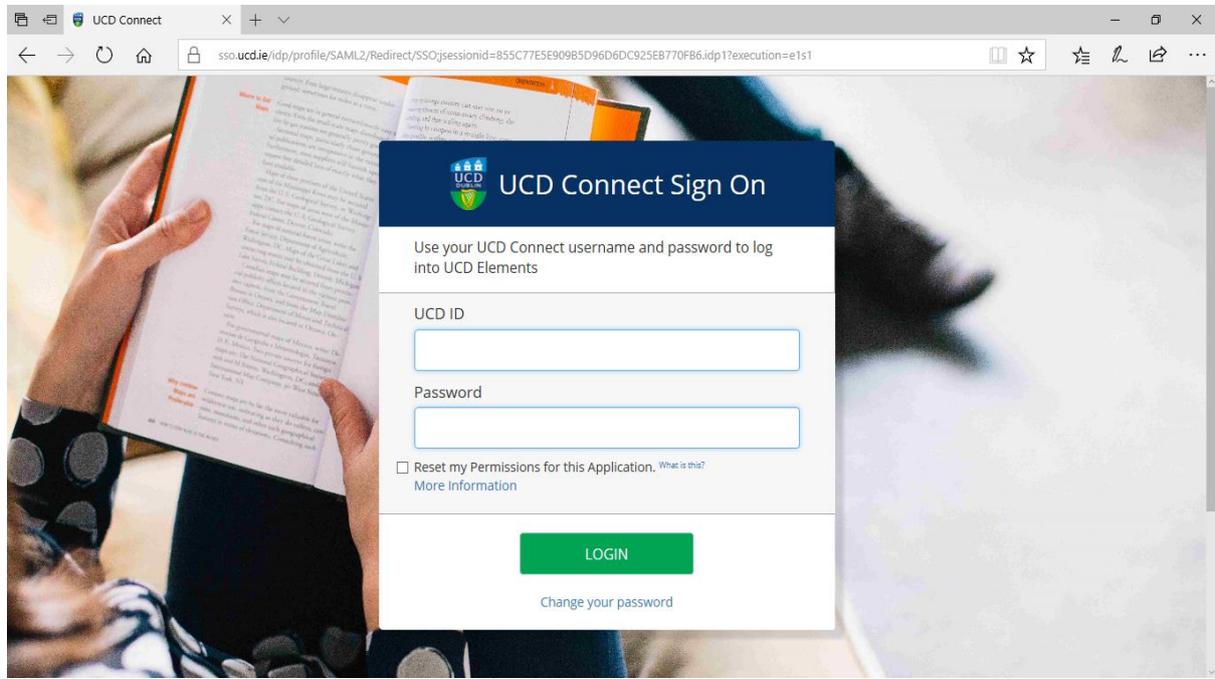
Benefits of the new RMS profile system:

- Reduced researcher workloads in responding to the demands of funding agency data requirements and from a streamlined citation capture and full-text publications upload facility.
- Reduced amount of manual intervention required to produce reports both for internal and external stakeholders.
- A common standards-based database capable of meeting the information demands of external stakeholders such as funding agencies, industry, research partners and collaborators.
- Better understanding of research strengths, beyond bibliometric analysis.
- Increased visibility of UCD's network of research partners and collaborators.
- Improved data quality through deployment of sophisticated deduplication algorithms and techniques.
- Ability to report on research strengths and achievements in a more sophisticated and inclusive manner.
- An enhanced system is a mandatory requirement for capturing research impact and in the understanding the journey from initial funding right through to impact.

This is the second version of this document and may require change. If you have any suggestions or questions, please contact: [rmssupport@ucd.ie](mailto:rmssupport@ucd.ie).

## How to log into the system

The new system is available at: <https://ucd.elements.symplectic.org> and the login uses your UCD Connect username and password. It will also be accessible via the UCD connect page shortly.



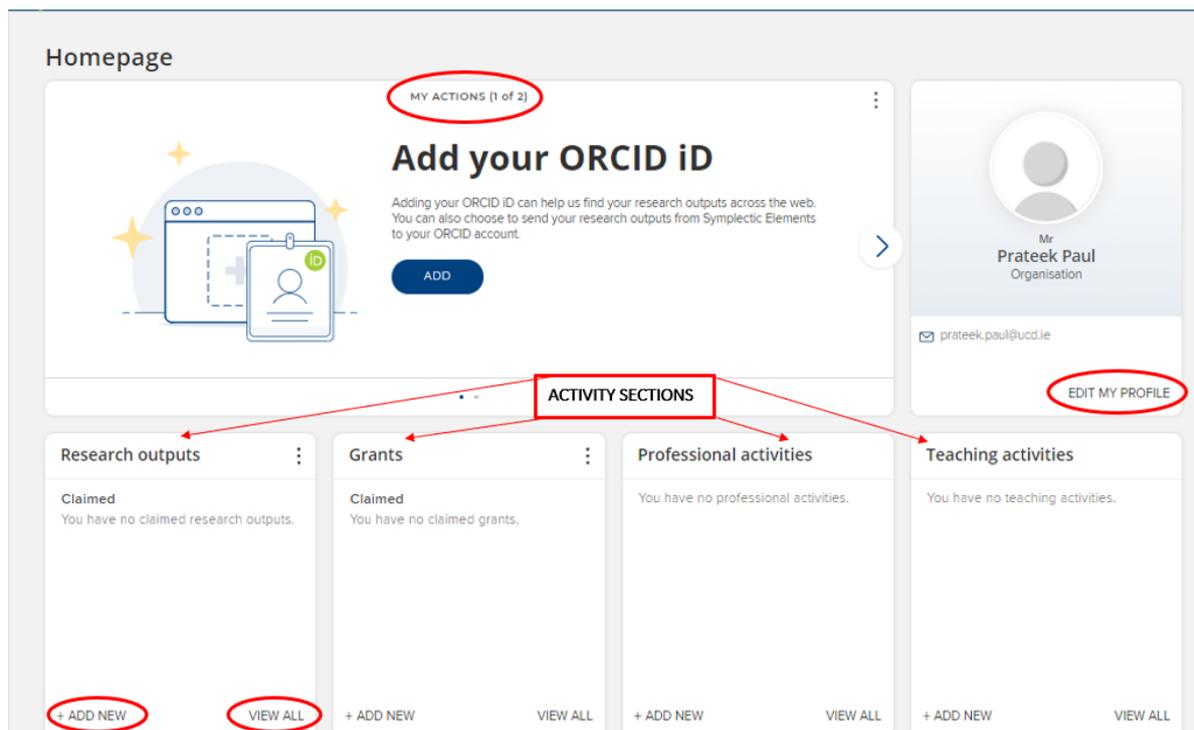
## Home Page-Navigating through the system

The **Home page** is where you land after logging into the RMS profile system.

Click on **EDIT MY PROFILE** to go to your Profile page. Scroll through the **MY ACTIONS** prompts. Every item has a link that takes you to the section in Elements where tasks can be completed, including:

- Add your ORCID iD
- Set up your search settings
- Add author identifiers
- Claim scholarly and creative works
- Deposit publications
- Add records of impact

Labels in each **ACTIVITY SECTIONS** are active links. Click on any one to go to that activity type or add manual records by selecting **+ ADD NEW** or view all records by selecting **VIEW ALL**.

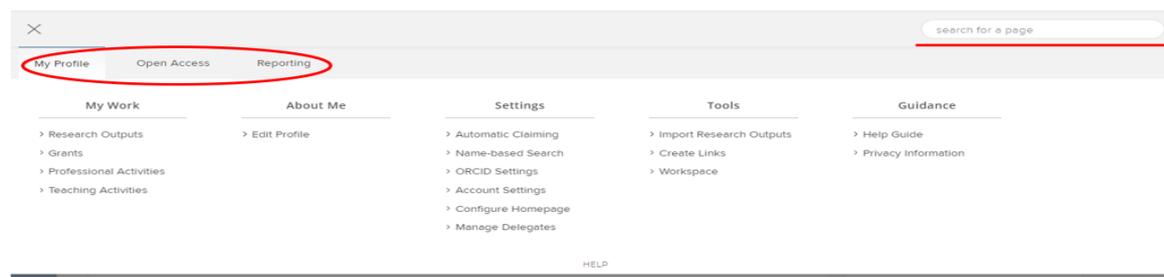


## Getting to know the Menu

Click on the **Menu** icon on the top left-hand corner to navigate around Elements.

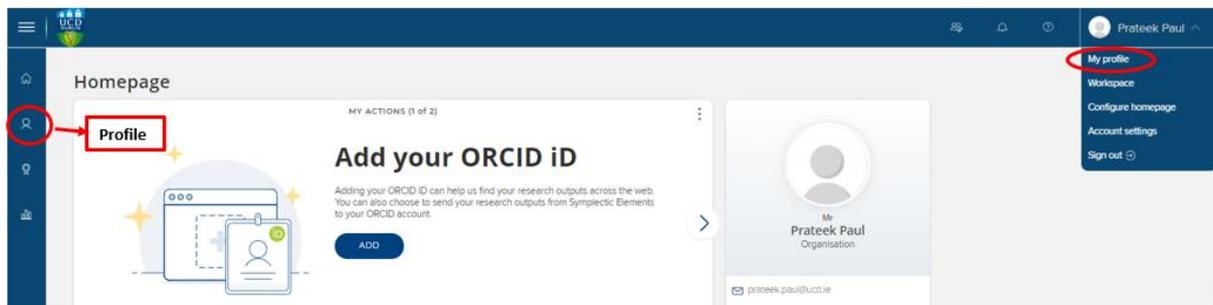


The **My Profile** section contains various areas specific to you. You can either browse through the tabs and click on individual sections to manage it or use the **Search box** on the upper right-hand corner to find pages. Please note: The menu items available will depend on the configuration and licence at your organisation and your roles within the system.



## Managing your Profile

To enter your profile, click on the **Profile icon** on the left-hand sidebar or select **My Profile** form the dropdown over your name and profile picture present on the right-hand corner of the homepage.

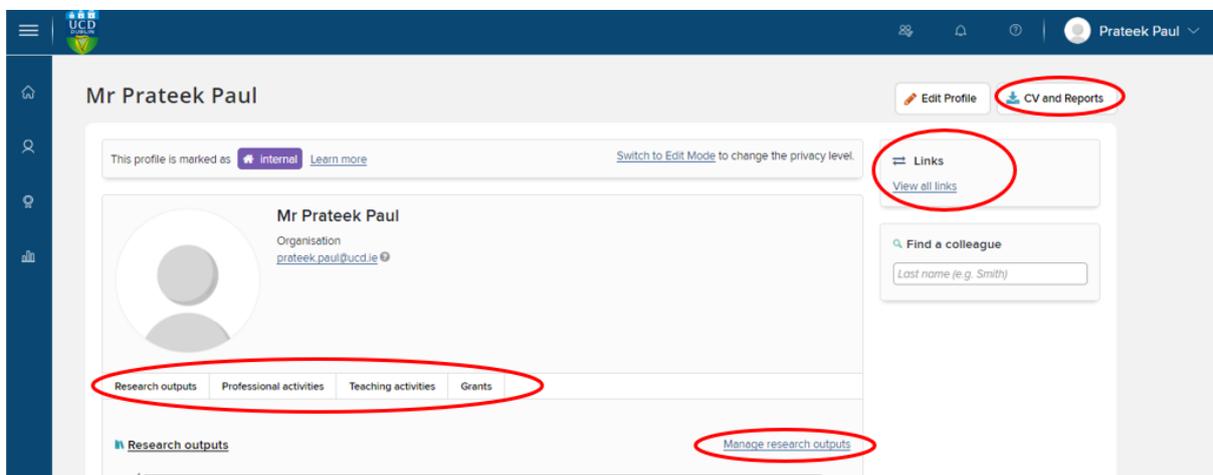


Your Profile can be viewed by any other user in the system.

It contains your photo, email address, an overview statement, your co-authors at your institution, experience, and a list of your **elements**: Research outputs, Grants, Teaching activities and Professional Activities that you can manage by clicking on the specified links to **manage each**.

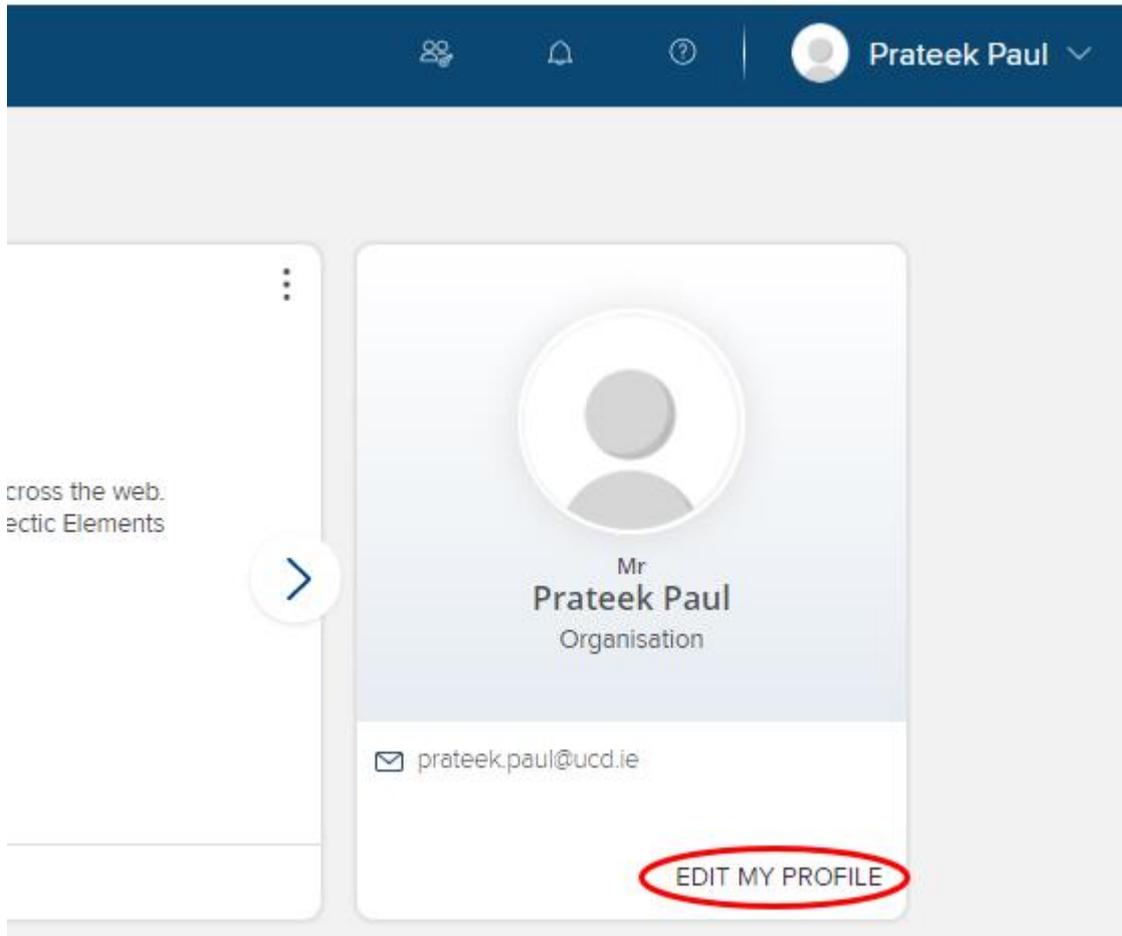
With the configured **CV and Reports functionality**, you will be able to export your Profile information in a variety of formats.

If you have added any author identifiers under your Search Settings, they will be displayed as **links** under Other profiles.



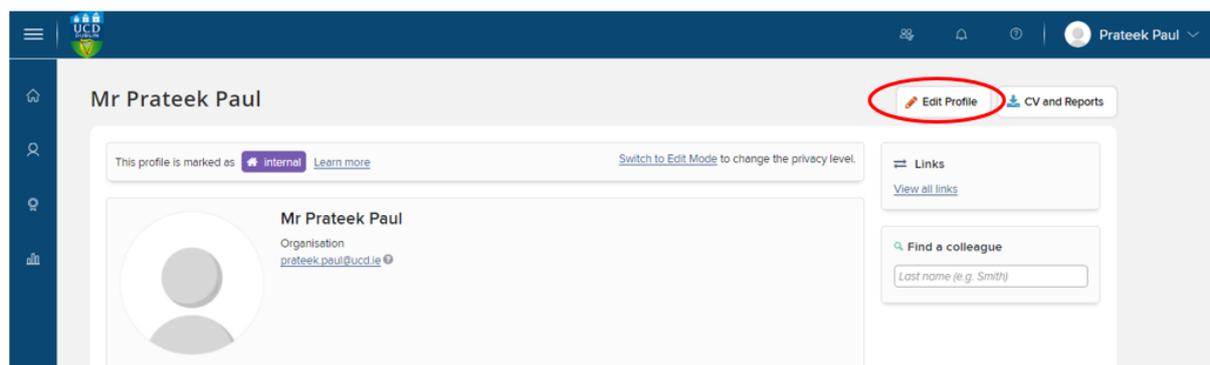
## How to edit your profile

When you first login to the profiles system you will be brought to the homepage. Click on the **Edit your profile** button to begin editing.

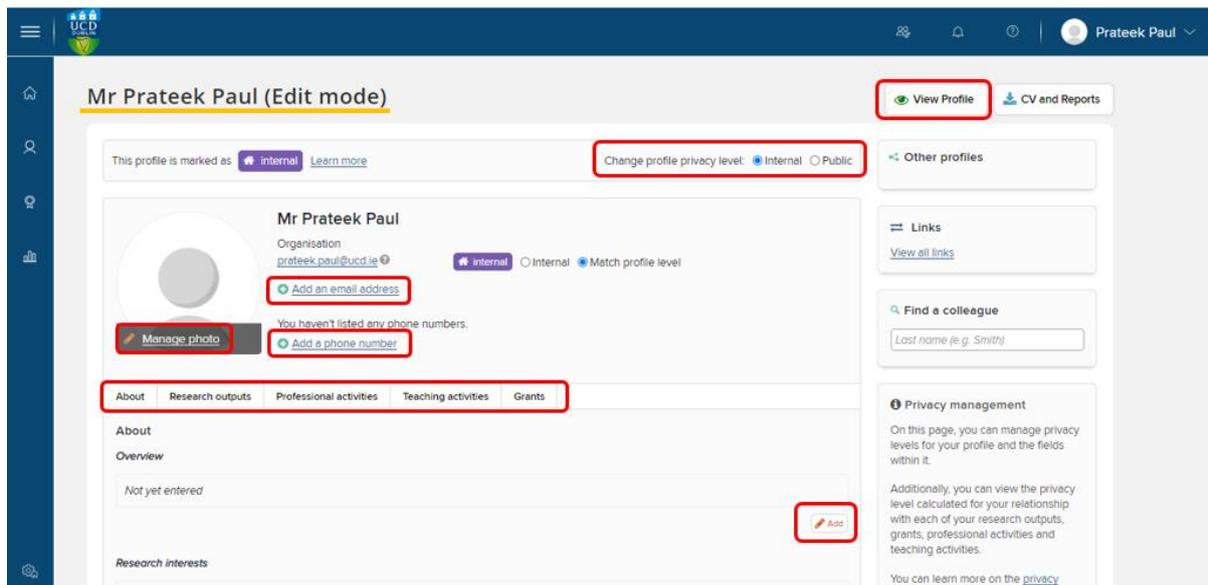


Or you can also enter your profile first and click on the **Edit Profile** tab on that page.

*(To enter your profile, click on the **Profile icon** on the left-hand sidebar or select **My Profile** form the dropdown over your name and profile picture present on the right-hand corner of the homepage.)*



Both these options will redirect you to the **Edit mode** of your profile, where:



- You can upload a photo -

By clicking on **Manage photo** link you can browse or drag and drop a local image into the specified area to be used as your profile picture. The file size must be less than 6MB. Supported file types: .png, .gif, .jpg. After selecting your image, you will be able to select a squared area and crop it.

- Add contact details -

by clicking on the +add symbol on Add an **e-mail** address and/or Add a **phone number** options below your name, title and school information.

- Add an overview, research interests, teaching summary, experience, language competencies, addresses -

By clicking the **Add** button on the right-hand side of the screen to add free text on overview, research interests, teaching summary sections and by clicking on the **+add** symbol on experience, language competencies, addresses sections in order to complete the necessary fields and save. There is a privacy option which allows to mark each section as private, if you wish so.

- Manage details on research outputs, professional activities, teaching activities and grants -

By clicking on the **manage link** on each section. These sections are grouped into *Recent*, *Favourites* and *All* tabs. For more details, please check the relevant chapter of this guide.

- View profile -

After completing all the details, you have the option to view your profile as a visitor by clicking on the **View profile** button at the right-hand side of the page. You can return to edit mode by clicking the same button which no labelled as **Edit Profile**.

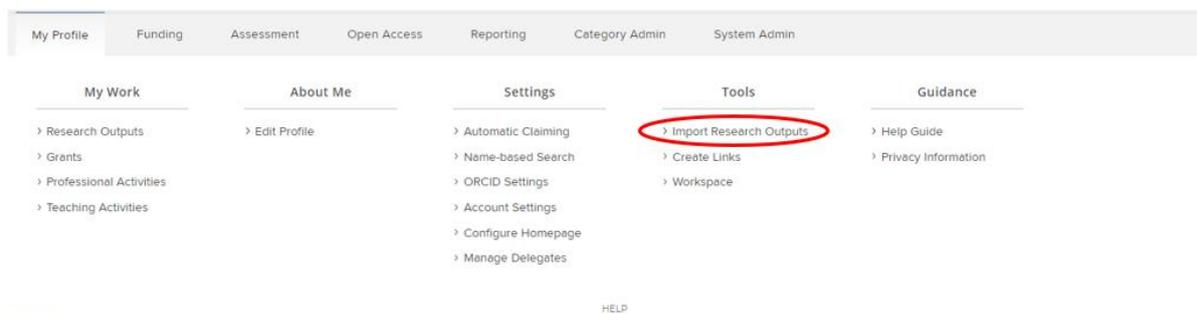
- Mark your profile as public -

After reviewing the information in your profile, you can click the **Public** button to make your profile public at the top right-hand side of your profile. After a couple of minutes your profile will be available at <https://people.ucd.ie/> . Your new URL is in the following format: <https://people.ucd.ie//<<email name without the@ucd.ie>>>.

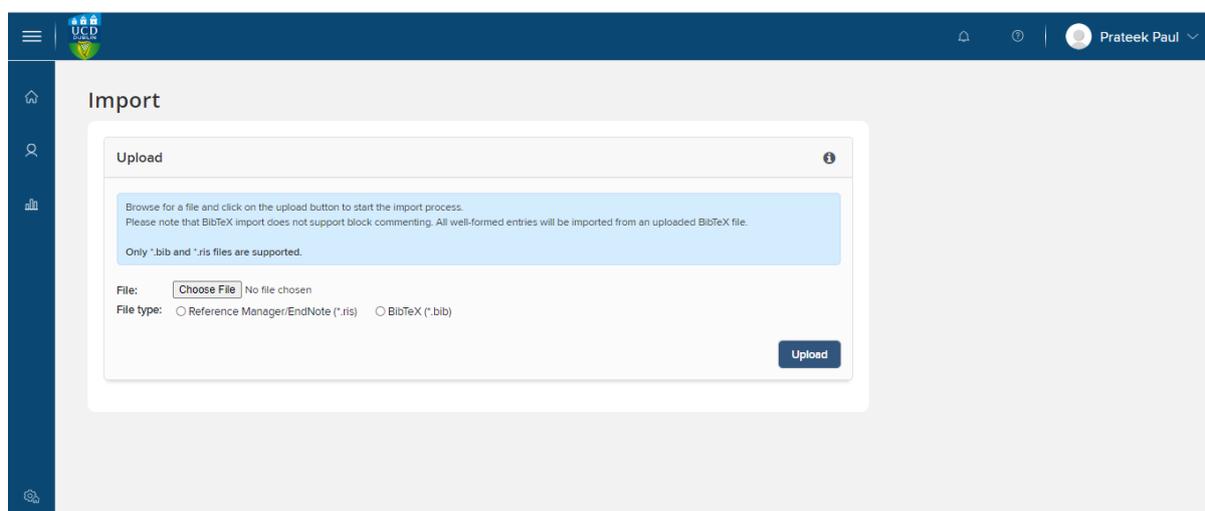
## Manage Research Outputs

### 1. Import Research Outputs

You can choose to Import your Research Outputs by uploading an End Note/BibTeX file by following *Menu* → *My Profile* → *Tools* → *Import Research Outputs*.



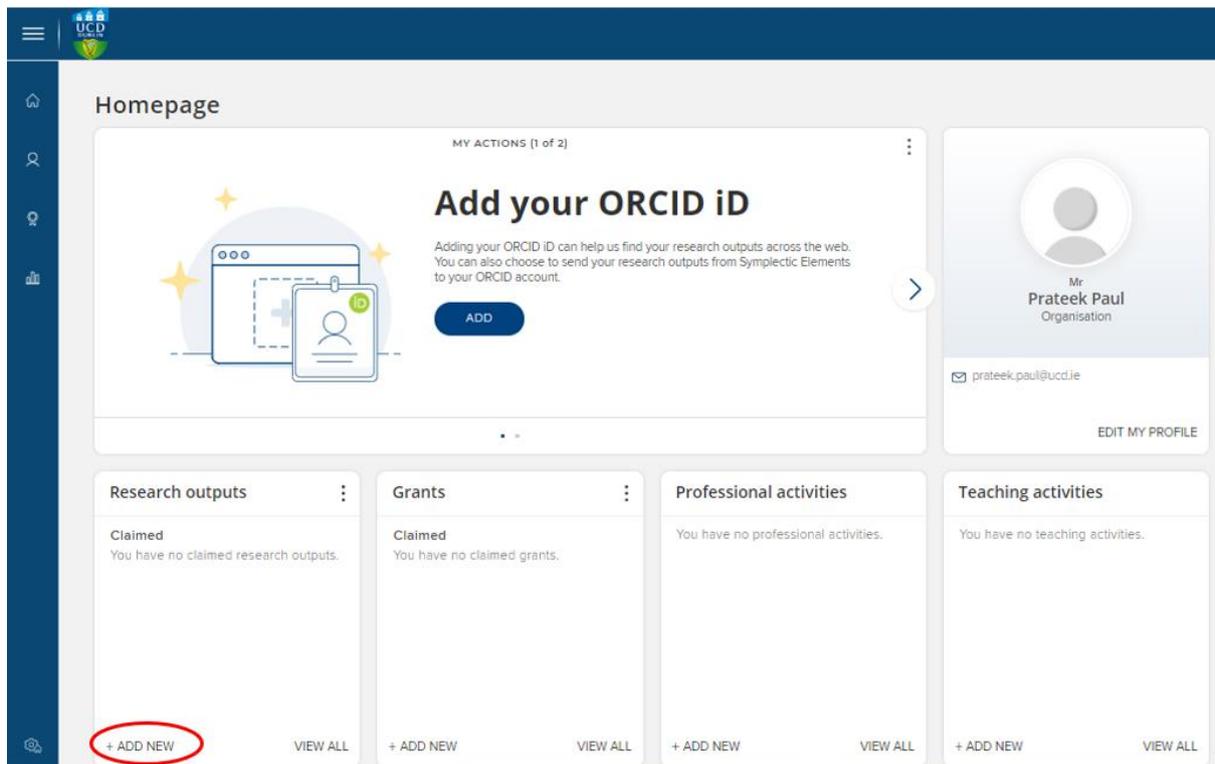
Browse for a file and click on the upload button to start the import process. Please note that BibTeX import does not support block commenting. All well-formed entries will be imported from an uploaded BibTeX file.



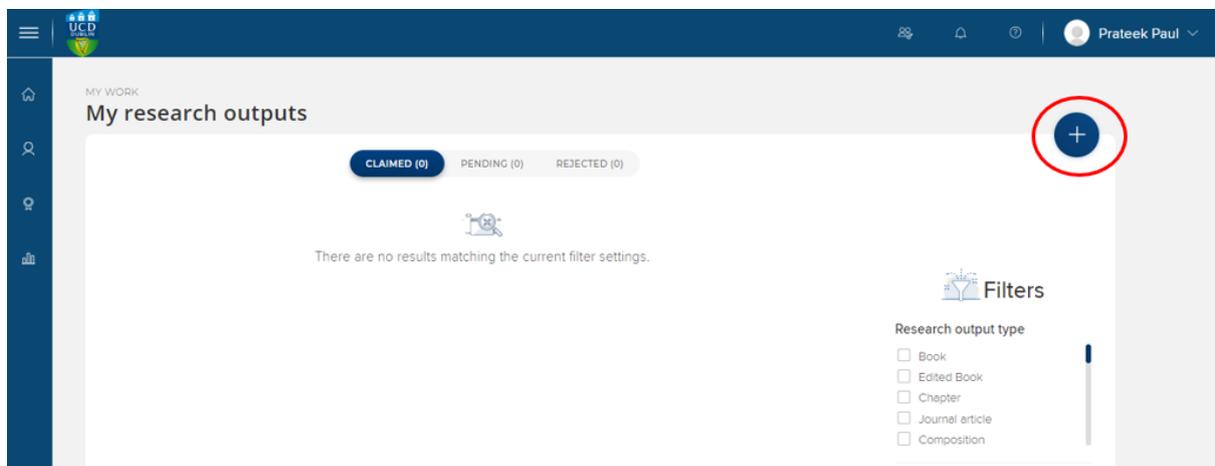
Note: The system will endeavour to find a matching record in the system. If it finds a match it will not import that publication as it already exists. If it is unable to find a match, then it will be imported. If this is an error, then it will be necessary to merge the two records within the system.

### 2. Add Research Outputs

You can add your research outputs manually by clicking on the **+Add** button present over the Research Outputs activity section at Homepage.



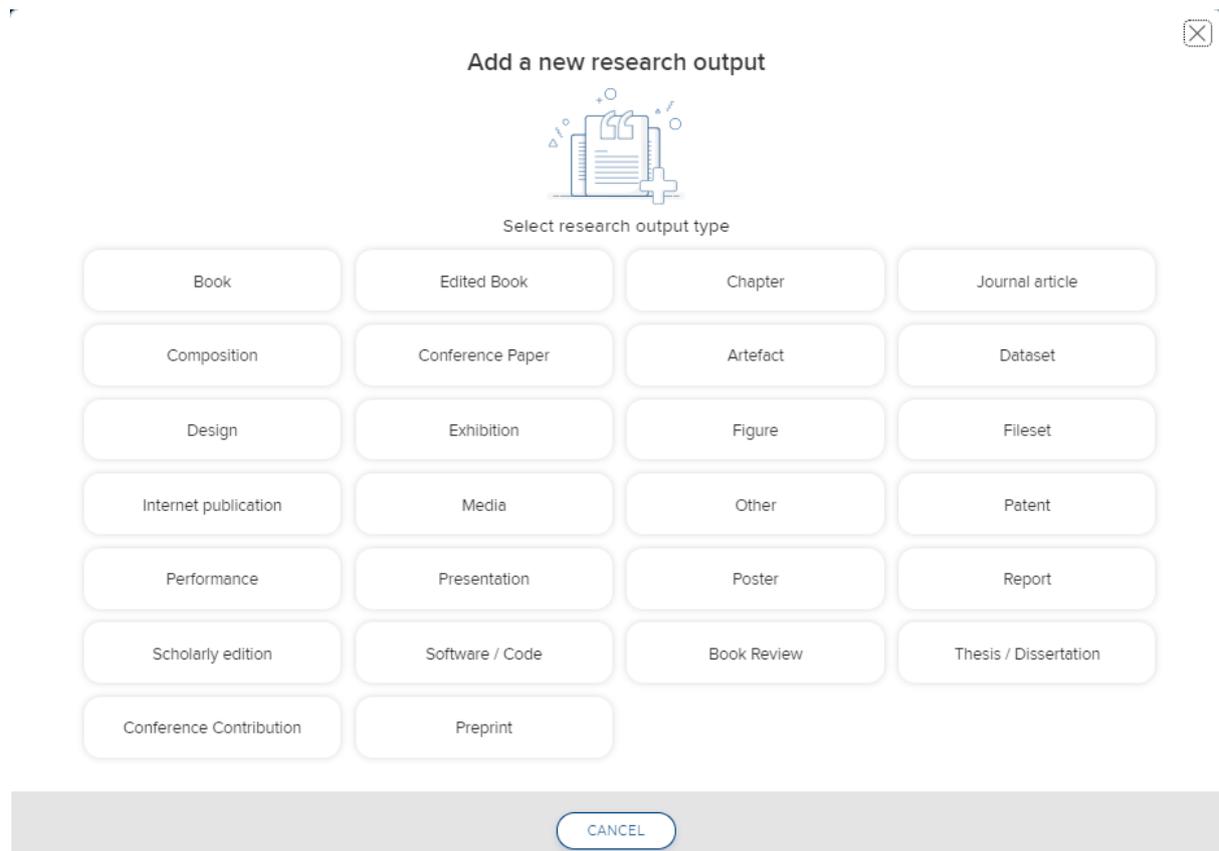
Or, you can add your research outputs by clicking on the + button on the right-hand corner of your research output page.



To reach **My Research Outputs** page you could follow either of the below mentioned path.

- i) *Menu → My Profile → My Work → Research Outputs.*
- ii) *Edit My Profile → Research Outputs → Manage research Outputs.*

Firstly, you will be prompted to choose the publication type you want to add.



**Add a new research output**

Select research output type

Book	Edited Book	Chapter	Journal article
Composition	Conference Paper	Artefact	Dataset
Design	Exhibition	Figure	Fileset
Internet publication	Media	Other	Patent
Performance	Presentation	Poster	Report
Scholarly edition	Software / Code	Book Review	Thesis / Dissertation
Conference Contribution	Preprint		

CANCEL

Once you have selected the output type, in the following screen you will need to type the title or DOI of the publication in the provided search box in order to check if this already exist in the system. This automatic checking confirms that you do not create a duplicate.

In case it exists, you can claim it and it will be added in your publication list.

Note: Titles returned may contain any of your search words.

**Enter your journal article title or DOI**

Your journal article may already exist in **Symplectic Elements**, so to save time you can search for it here and claim it. Titles returned may contain any of your search words.

Title or DOI  
 [Skip](#) [Search](#)

**In Symplectic Elements** - Showing 10 results [Explain these results](#)

[Cell differentiation versus cell death: Extracellular glucose is a key determinant of cell fate following oxidative stress exposure](#) • 01 Feb 2014 [Claim](#)  
 Poulsen RC, Knowles HJ, Carr AJ, Hulley PA

[Cell death in mammalian cell culture: molecular mechanisms and cell line engineering strategies](#) • 01 Nov 2010 [Claim](#)  
 Krampe B, Al-Rubeai M

[Cell death in mammalian cell culture: Molecular mechanisms and cell line engineering strategies](#) • 01 Jun 2010 [Claim](#)  
 Krampe B, Al-Rubeai M

## Thank you

**i** *Your publication is not deposited and is not linked to funding.*

**Do more with this journal article:**

[Deposit to Research Repository UCD](#) [View your publication details](#)

[Link funding to your publication](#)

**You could also:**

[Go to your home page](#)

You can do more with the publication once it is claimed and linked to your profile. You can deposit it to the UCD Research Repository, view its details or link it to funding.

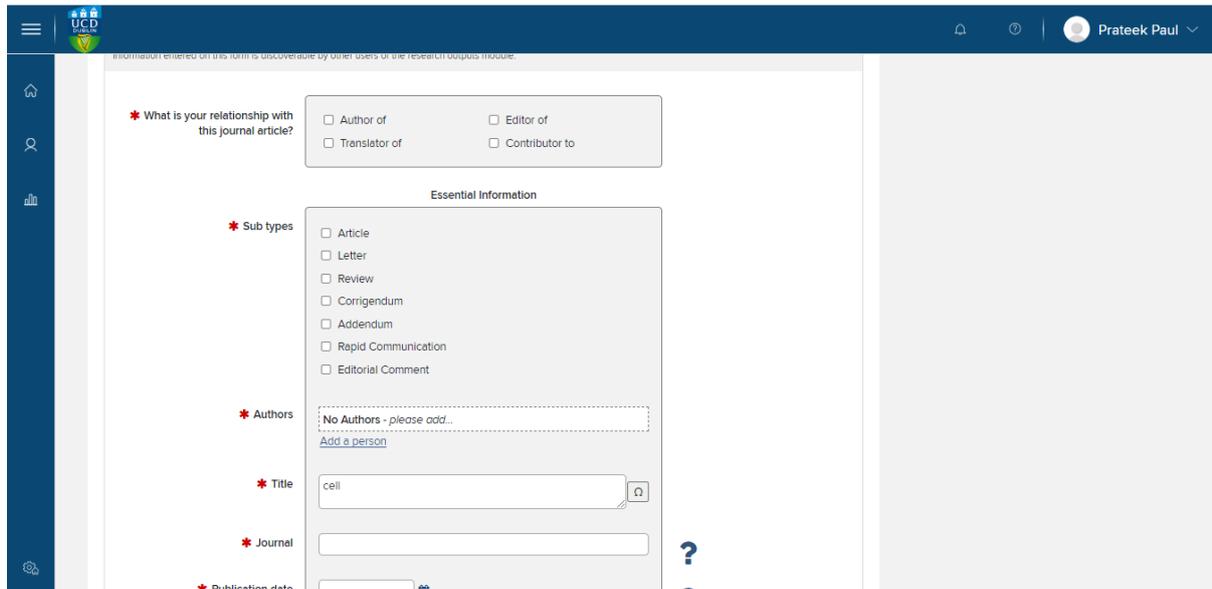
Note: You can upload the peer reviewed draft ('accepted version') of articles and conference papers, final draft of other publications. In general, the published version cannot be accepted. The Library will

check the version, copyright and publishers' policies before items go online. If you have any questions, please contact [research.repository@ucd.ie](mailto:research.repository@ucd.ie).

If your article is already somewhere in Open Access form, you can simply enter the URL location of OA.

If you need to set up an exception for your article (embargo or other access restrictions), choose an item from the pre-configured exception list and add a comment.

In case it doesn't exist, you can press skip and continue to add manually the necessary details.



The screenshot shows the UCD Research Repository submission interface. At the top, there is a navigation bar with the UCD logo and the user's name, Prateek Paul. Below the navigation bar, there is a sidebar with icons for home, search, and help. The main content area is a form with several sections:

- Relationship:** A section titled "What is your relationship with this journal article?" with four radio button options: Author of, Editor of, Translator of, and Contributor to.
- Essential Information:** A section titled "Essential Information" with a list of sub-types: Article, Letter, Review, Corrigendum, Addendum, Rapid Communication, and Editorial Comment.
- Authors:** A section titled "Authors" with a text input field containing "No Authors - please add..." and a link "Add a person".
- Title:** A section titled "Title" with a text input field containing "cell".
- Journal:** A section titled "Journal" with a text input field.
- Publication date:** A section titled "Publication date" with a text input field.

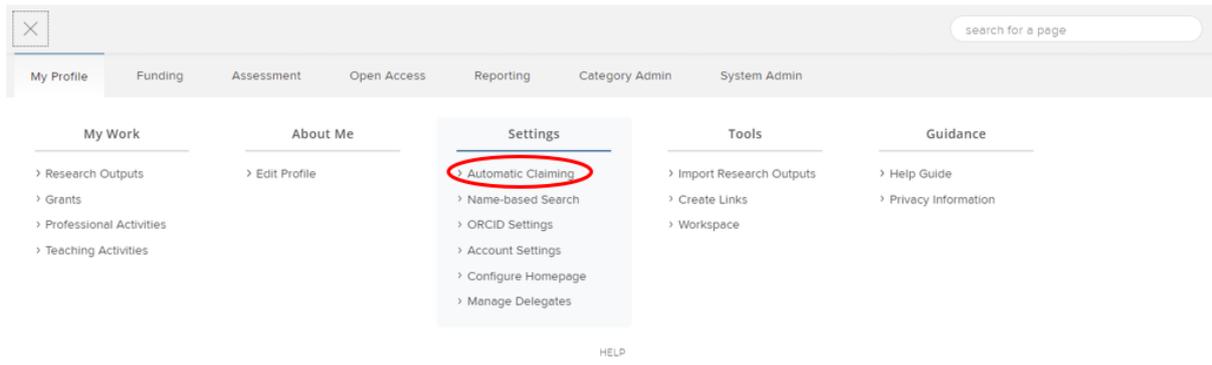
(Note: This screenshot is valid for Journal Articles only, entries for other research outputs may differ)

For some types you have no option but to fill in all the details manually. Required fields are marked with an \* and are essential fields displayed by default. All other fields are optional. Don't forget to *Save* and continue and follow the prompts to view your publication. After adding a publication, you can also upload it into UCD Research repository or enter an OA location.

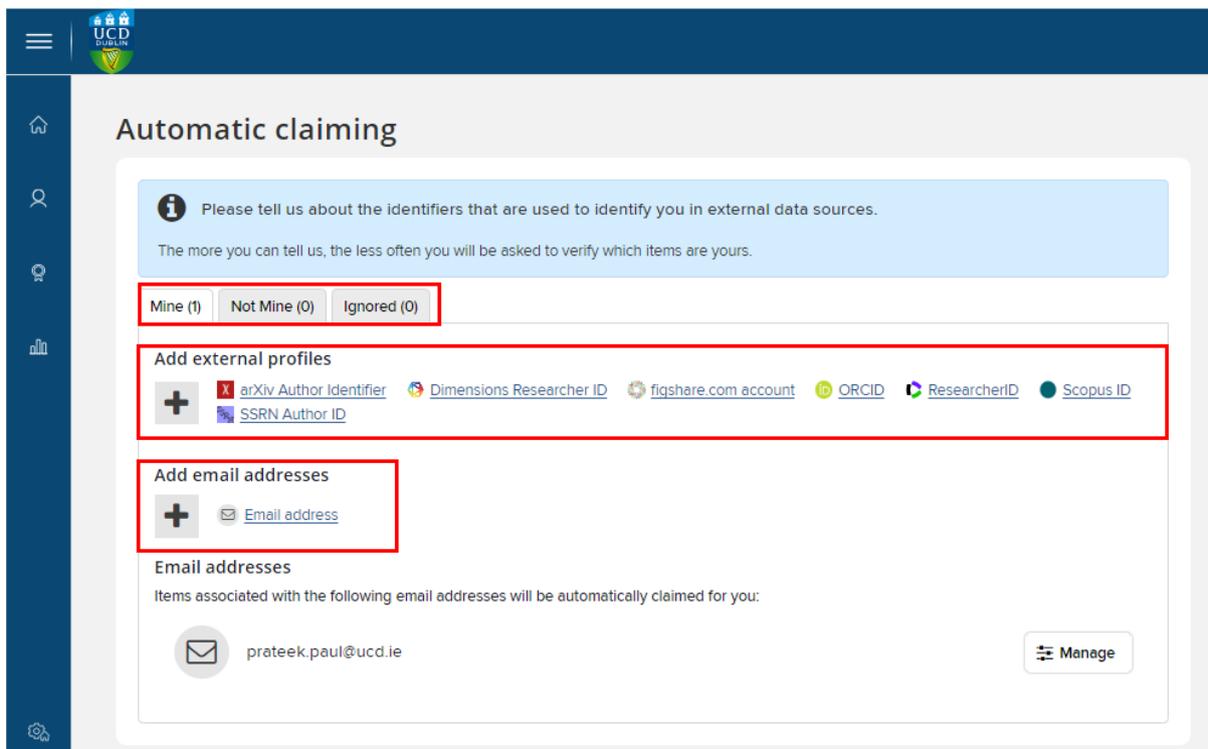
### 3. Automatic Claiming

The Automatic Publication Claiming page allows you to manage your author identifiers within the RMS profiles system. The system will attempt to guess which identifiers is yours, based on the provided data. All you must do is to confirm whether the identifiers (email addresses or external IDs) are yours or not, by clicking on *Yes*, *No* or *Ignore*. Once confirmed, the system will then automatically claim all publications which features your identifiers and continue to do so in the future. Conversely, by declaring that an identifier is not yours, all publications which feature that identifier will be automatically rejected and no longer be offered to you as a pending publication.

To enable this, please go to *Menu* → *My Profile* → *Settings* → *Automatic claiming*.

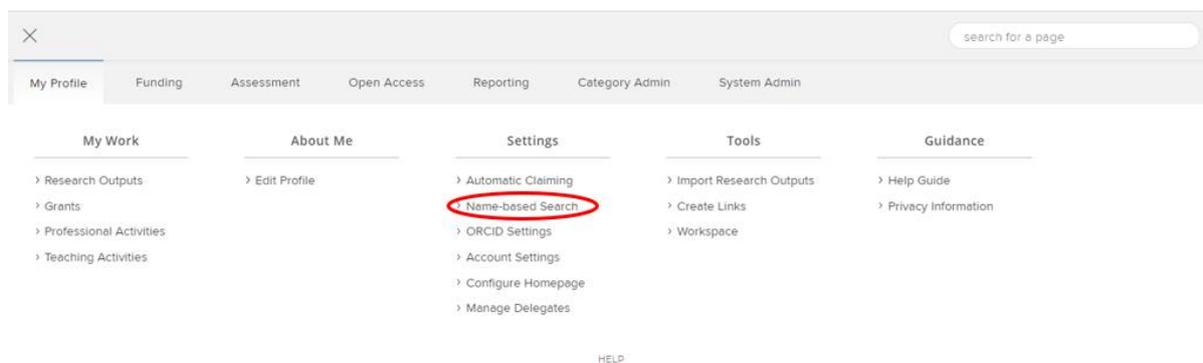


The system will find new publications in the online databases that match your search terms. These will be placed in the *Pending list* of your records to await your approval. One of the actions in your *My Actions* list will take you to the pending publications. *Claim* or *reject* individual publications using the green tick or red cross buttons. Or you can select a number of publications using the checkboxes, then claim or reject the marked publications with the large buttons at the top of the list. Claimed publications will move to the *Mine list* and rejected to the *Not mine* list. If you have lots of items that do not belong to you, work with your System Administrator or Research Manager to clear the *Pending list*, modify your search settings to improve the accuracy of the searches, and re-run your search.



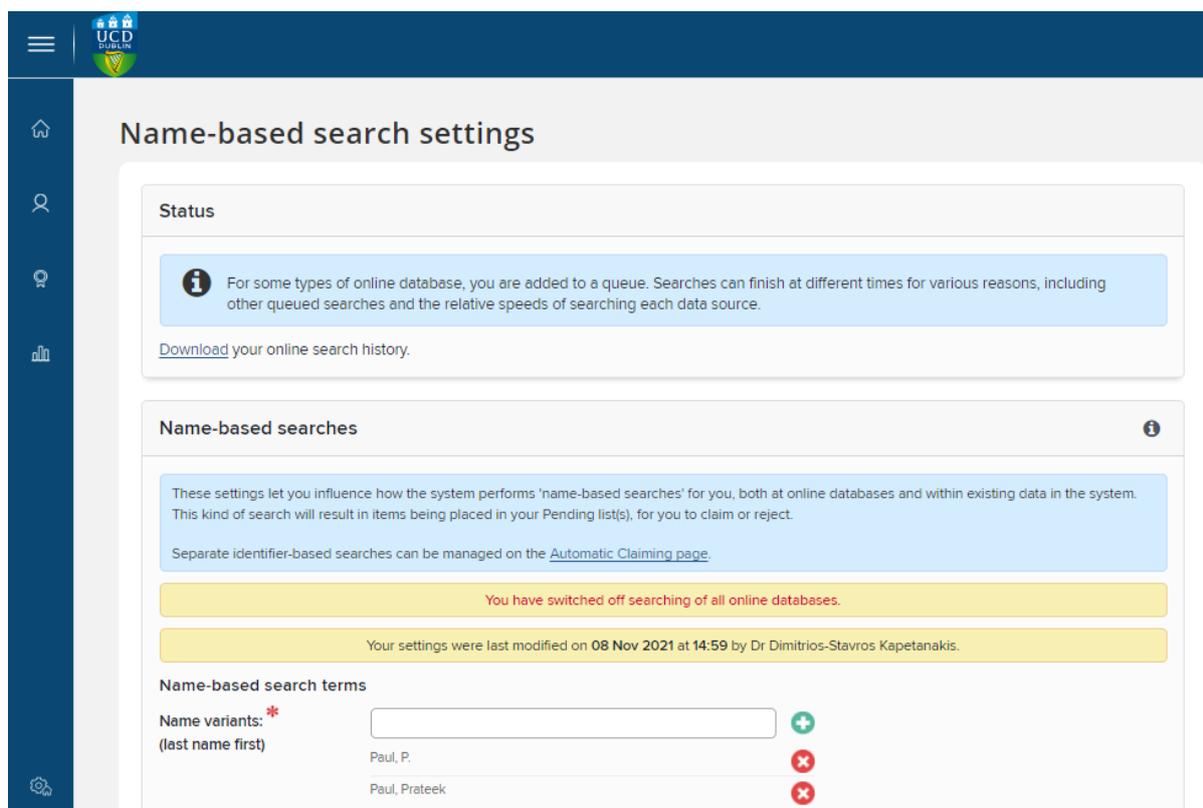
#### 4. Modify name-based search settings

To enable this please go to *Menu* → *My Profile* → *Settings* → *Name-based Search*



Your search settings are preloaded with your name and institution, but you can also add *Name variants* or *Address terms*. Don't forget to click *Save* when you're finished editing your search settings. You can also add here any external IDs, i.e. Scopus or ORCID ID.

Tip: Additional search terms may be restrictive. If you can add Keywords or Journals, then the system will only retrieve articles that include those keywords or published in those journals.



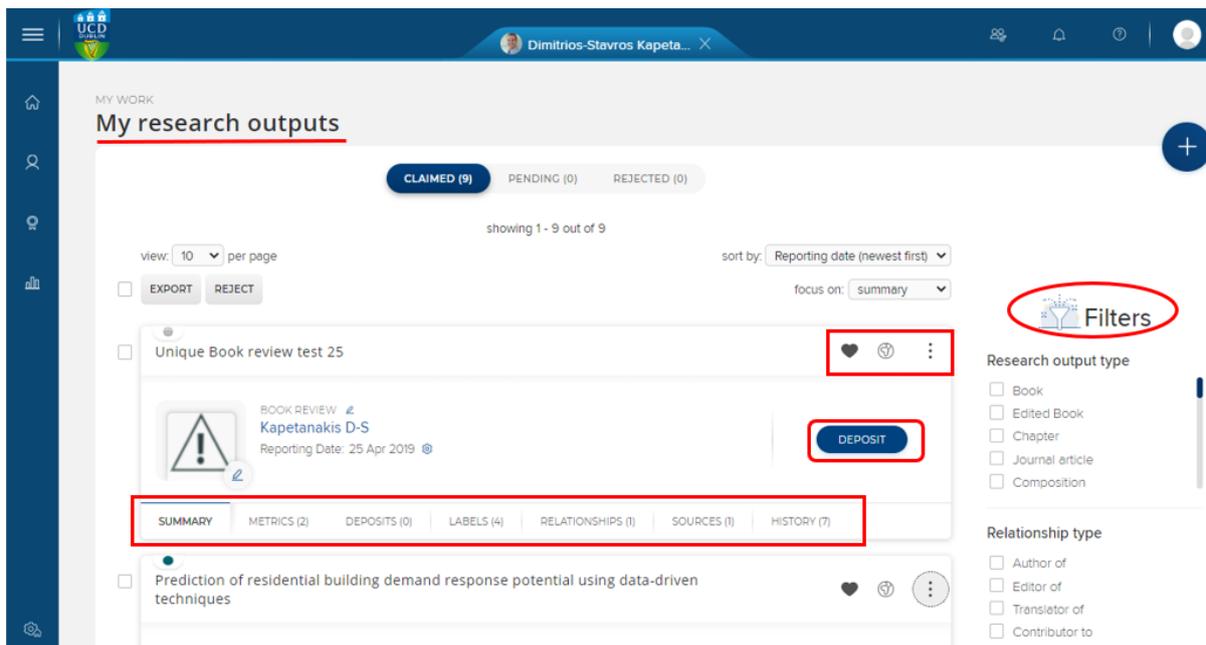
After you update the search settings, click the *Run my searches* button and examine the results in the Pending folder. If the results seem generally good, you're done. Accept and reject as needed. If there

are too many or too few results, clear out the pending publications. Revise the search settings and run the synchronizer again. Repeat as needed.

## 5. My Research Outputs page

To reach **My Research Outputs** page you could follow either of the below mentioned path.

- i) *Homepage → Research outputs activity section.*
- ii) *Menu → My Profile → My Work → Research Outputs.*
- iii) *Edit My Profile → Research Outputs → Manage research Outputs.*



The **tabs below the output** title allow you to view the summary of that output, it's metrics, status of Research Repository UCD deposits, all the labels associated with the item, relationships with other users in your institution who are associated with the publication (co-authors, editors, translators) and links with grants, the list of data sources where the item was found (including manual) and the history of the item (claimed, merged, split, edited).

You will find the **Deposit** button at the centre of each output section which you can click to deposit it into the UCD Research Repository.

And, at the top in-line with output title you will find short cut tabs for marking it as **favourite** to improve its visibility in your public profile, its **privacy** setting and a **more** icon that includes buttons to view details, add to workspace and reject.

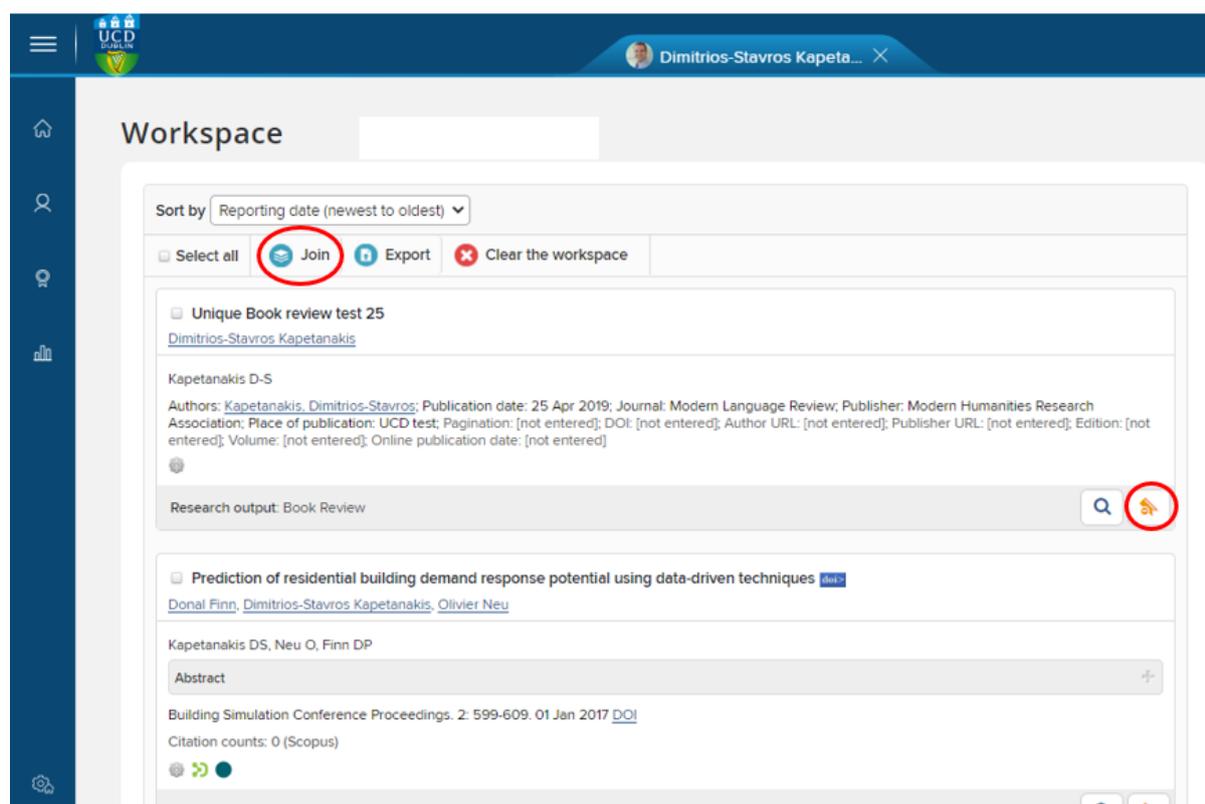
You can also use the **Filters** section on the right-hand side of the page to filter out your outputs using different categories. Also, you can use the **+** button to add new items which you can also do directly by clicking on the **+Add New** button present at the homepage Research Activity section.

## 6. Merge Records

Occasionally, the synchronizer will not unify items from different data sources, usually because of a problem with an identifier such as a DOI or ISSN. More commonly, manually entered articles do not automatically merge with harvested records. In those instances, these records can be merged.

When you have located the items that you wish to merge, claim them both. Then, click on the *More Icon* and add them to the workspace by clicking the *Add to Workspace* tab. You'll then see that the *Workspace* has two items in it.

Go to workspace following the either path *Menu* → *My Profile* → *Tools* → *Workspace* or click on the drop down over your name and icon present at the top right-hand side corner of your page and select *Workspace*.

The screenshot shows the 'Workspace' interface of a system. At the top, there is a navigation bar with the UCD logo and a user profile for 'Dimitrios-Stavros Kapeta...'. The main area is titled 'Workspace' and contains a list of records. The first record is 'Unique Book review test 25' by 'Dimitrios-Stavros Kapetanakis'. Below the title, there is a checkbox, a 'Join' button (circled in red), an 'Export' button, and a 'Clear the workspace' button. The record details include the author 'Kapetanakis D-S' and a list of metadata fields. The second record is 'Prediction of residential building demand response potential using data-driven techniques' by 'Donal Finn, Dimitrios-Stavros Kapetanakis, Olivier Neu'. It also has a checkbox, an 'Abstract' button, and a 'Research output' field. A search icon and a 'More' icon (circled in red) are visible at the bottom right of the record area.

You'll see the two versions of the article. Click the checkbox beside the article titles and then click the *Join* button. The resulting merged record will be displayed, along with the message *Publication joined...* Note that the name of the person who joined the records is recorded. You can also remove/ deselect an output by clicking the icon marked at the bottom.

When you return to the researcher's profile, the newly merged record will be there. If you click on the *History* tab, you'll see a complete history of the item, including the names of the people who acted on it. Also, you can add notes for accepted publications.

## 7. Split Records

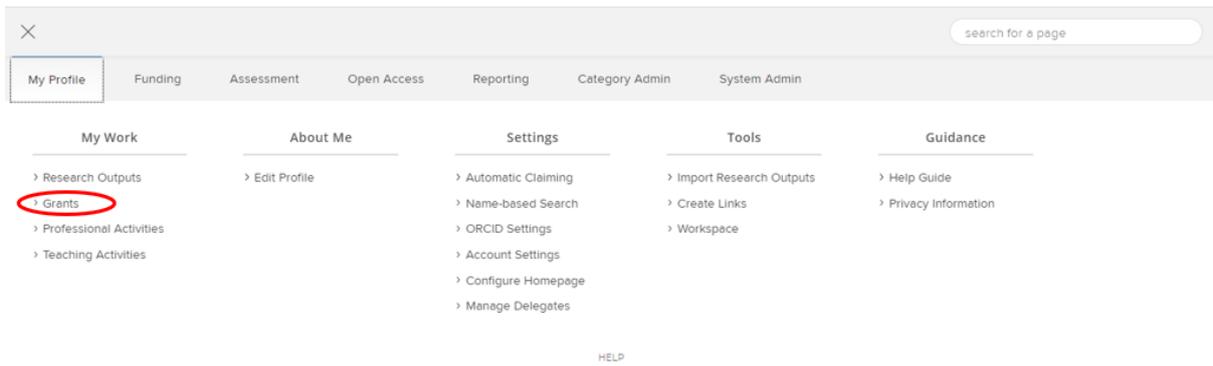
In the rare instances where the synchronizer retrieves mismatched records or if a user incorrectly merges records, they can be easily split. Click on the *Sources* tab and click on the *two-headed* arrow beside the record you wish to remove. The split record will be added to the user's profile for enhancement or deletion.

The screenshot shows a research record titled "Prediction of residential building demand response potential using data-driven techniques". It features three source entries: Scopus, Research Repository UCD, and Manual. The Scopus entry has a red circle around its split icon (two-headed arrow). Below the sources is a navigation bar with tabs: SUMMARY, METRICS (3), DEPOSITS (0), LABELS (0), RELATIONSHIPS (3), SOURCES (3), and HISTORY (15). The SOURCES (3) tab is currently selected.

## Manage grants

You can visit your grant page either by selecting **Grant Activity Section** from home page or by following the path *Menu* → *My Profile* → *My Work* → *Grants*.

The screenshot shows a user's homepage dashboard for Dimitrios-Stavros Kapetanakis. The main section is "MY ACTIONS" with a "Link your research outputs to funding" prompt. Below this are four activity sections: Research outputs (9 outputs), Grants (2 claimed), Professional activities (1 association, 1 public engagement activity, 2 reviewing/refereeing, 1 record of impact), and Teaching activities (1 course taught, 1 research-based degree supervision). The "Grants" section is highlighted with a red box, and its "+ ADD NEW" button is also highlighted with a red box.

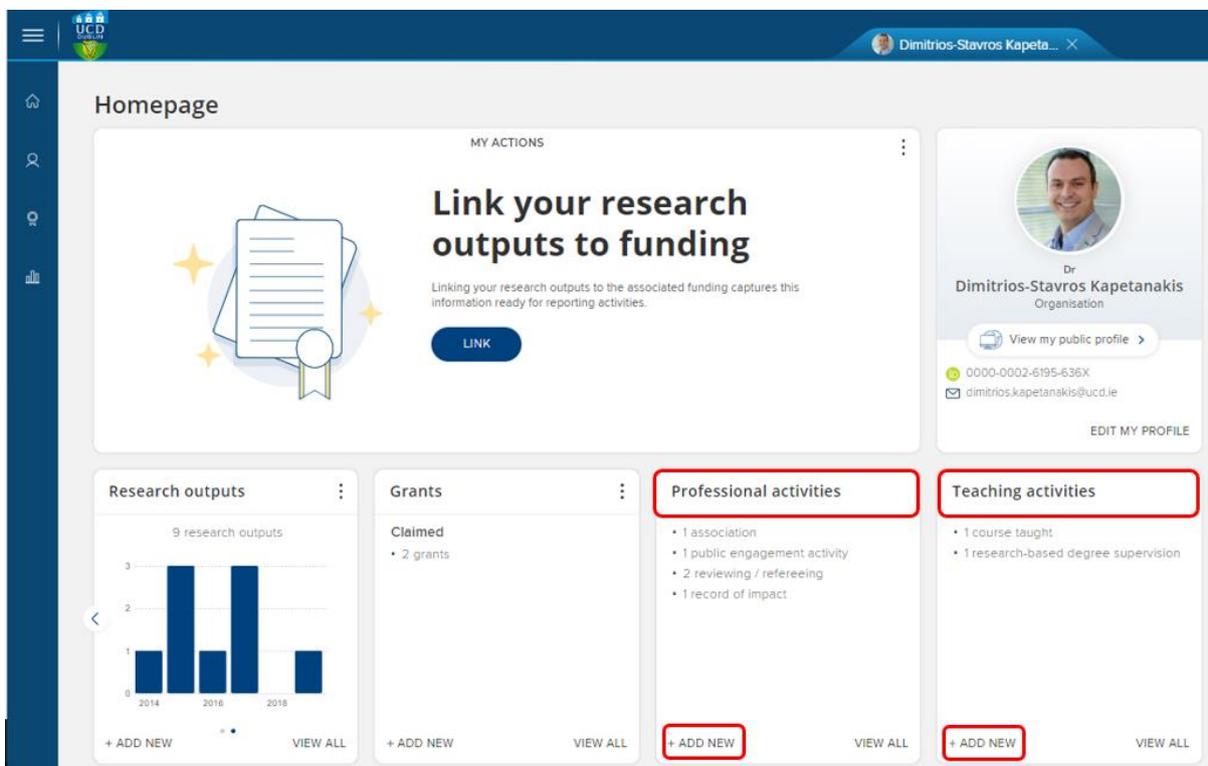


Grant information is fed nightly from the RMS Grants system and includes only the grants that were registered centrally with you as a PI or Co-PI. Queries relating to registration of grants should be directed to the Grant Registration Team at [grantreg@ucd.ie](mailto:grantreg@ucd.ie). When a new grant is registered, RMS Profiles will display it the following day. It is also possible to manually add a non-UCD Grant by clicking on the **+ button** inside grant page or clicking on the **+Add New** button over the grant activity section in homepage.

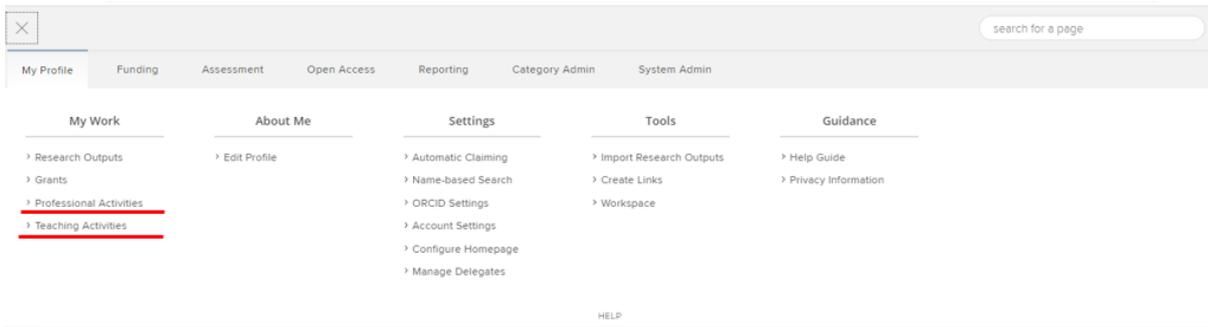
Note: All grants are marked as private by default and are not available to view by others. In case you want to make a grant visible you need to find the grant from the list and click on the **earth icon** (*privacy settings*) to make this item visible in your profile.

### Manage professional activities, teaching activities

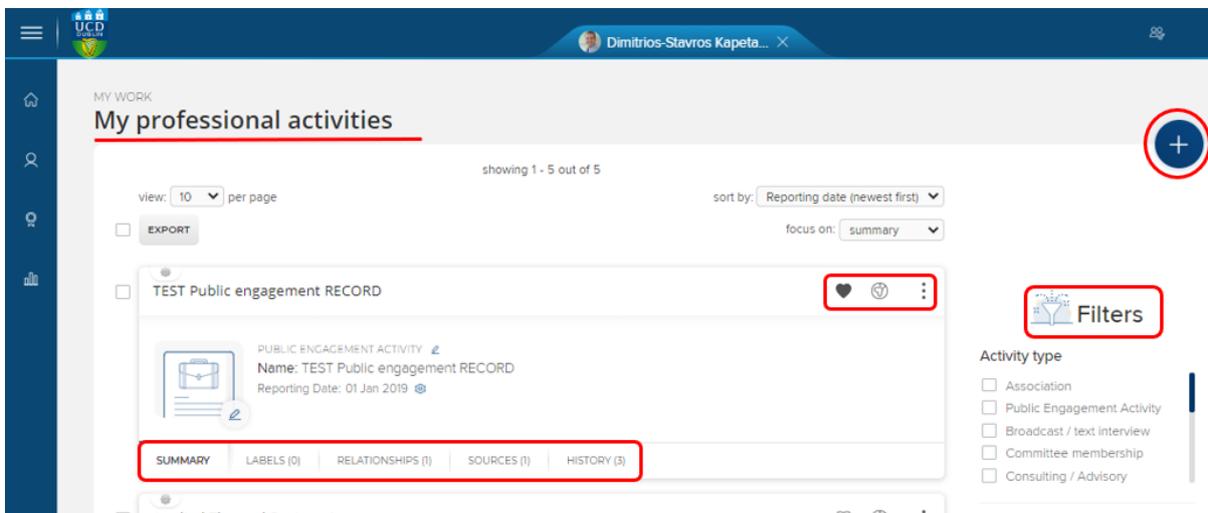
You can either click on the Professional activities or Teaching activities Activity Section from homepage to visit individual page or click **+Add New** button to directly add a new item respectively.



or go to *Menu* → *My Profile* → *My Work* → *Professional activities Or Teaching activities*.



Once you reach the individual page click the + button to add new items.



Similar to managing your Research outputs these activities have toolbox at the bottom of each section and at the top in-line with the title.

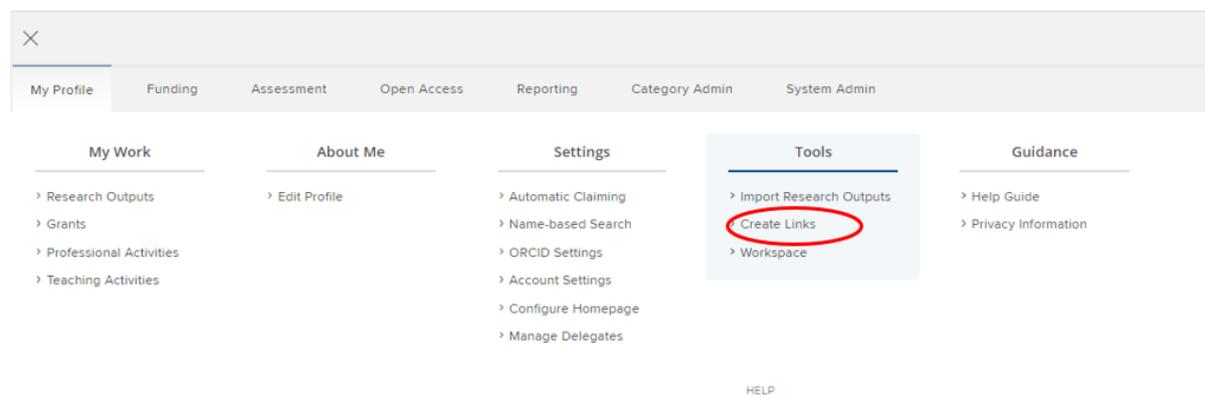
The **tabs below the output** title allow you to view the summary of that output, all the labels associated with the item, relationships with other users in your institution who are associated with the publication (co-authors, editors, translators), the list of data sources where the item was found (including manual) and the history of the item (claimed, merged, split, edited).

The tabs above are for marking an item as **favourite** to improve its visibility in your public profile, its **privacy** setting and a **more** icon that includes buttons to view details, add to workspace and reject.

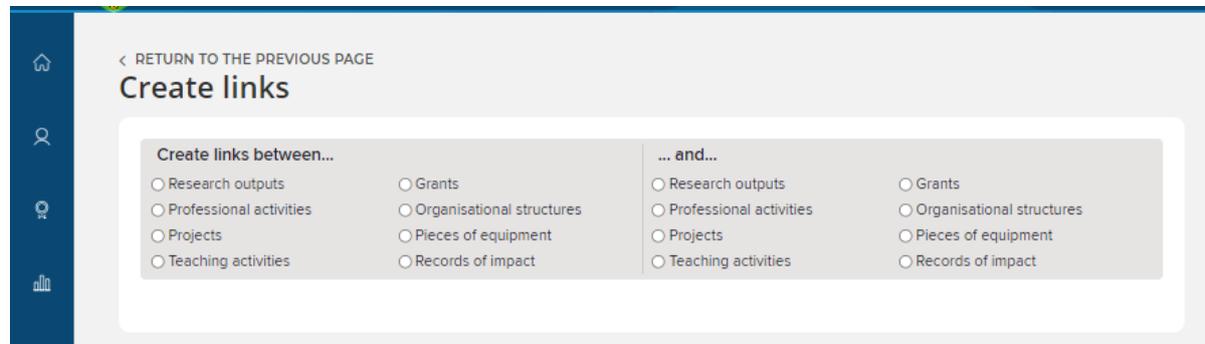
## Create Links Option

### 1. Adding Links

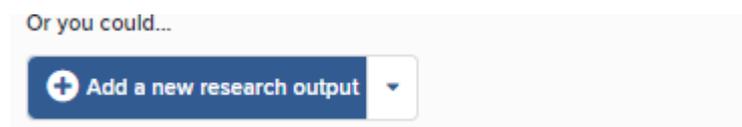
Creating a relationship between two items, for example -- an article and a grant only requires a couple of clicks. You can go to *Menu* → *My Profile* → *Tools* → *Create Links* and select the type of items you want to link.



This option will bring you to the following page:



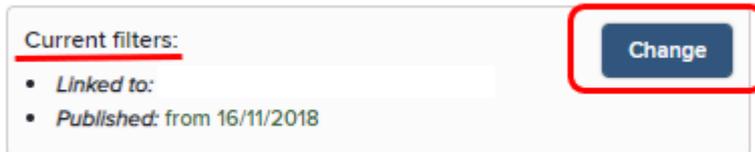
When you choose *Research Outputs*, the current list of your publications will appear at the bottom left side of the page and when you click on the *grants* option then the list of grants will appear at the bottom right side of the page. You will also have the option to add a new item by clicking the relevant button that appears in the end of your current list of items, *Add a new xxx activity*.



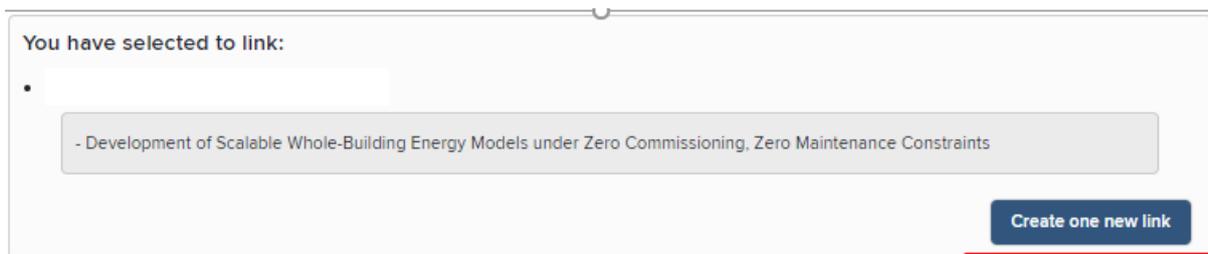
If the brief citation in the *Results* view does not provide enough information for you to decide on its relationship to other items, click on the *View* icon, which will open the full item in a separate tab. Clicking the *Existing Links* icon presents a view of the relationships currently defined in the system.



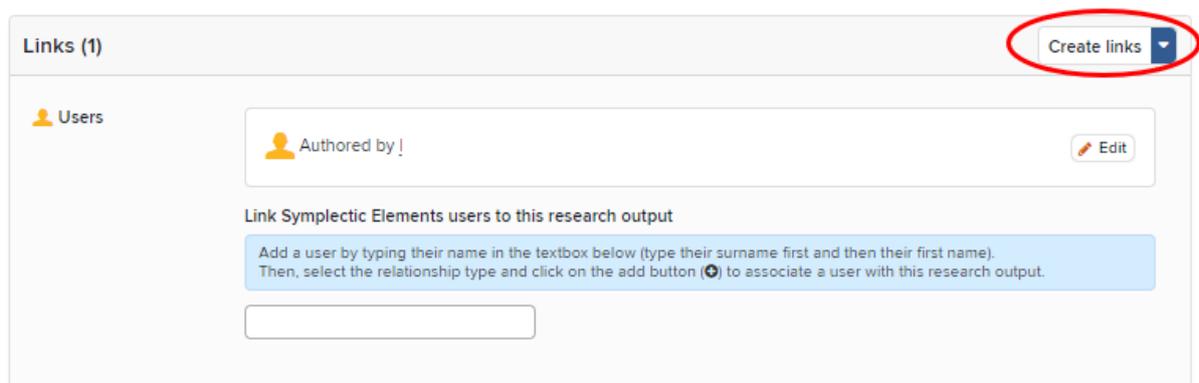
Note: The filters are preset to include items from the past two years, but you can change the date range -- as well as other parameters -- by clicking on *Change*, which brings up the filter options. If you are sure an item is in the system, but you aren't finding it using the default search settings, try changing the "Linked to" value from your name to "Anyone" or remove the Date restriction.



After you have filtered the items to bring up the correct article and grant, check the items. This will prompt the system to open the *Click to create* menu in order to click on the button *Create a new link*. If a research output was supported by multiple grants, they can all be selected at this point and linked; however, if you attempt to link items that already have a relationship, the system will display an error message.



Note: There is an option to add links to a specific item by going to detailed view of the item by clicking on the title and then clicking on tab **Create Links** of the Links section of the item present at the bottom of the page.



## 2. Removing and editing links

Removing links between objects is simple. Start by clicking on the *Links* tab in the item in your profile. This will expand the list of current links so you can review your options. Select the link you wish to

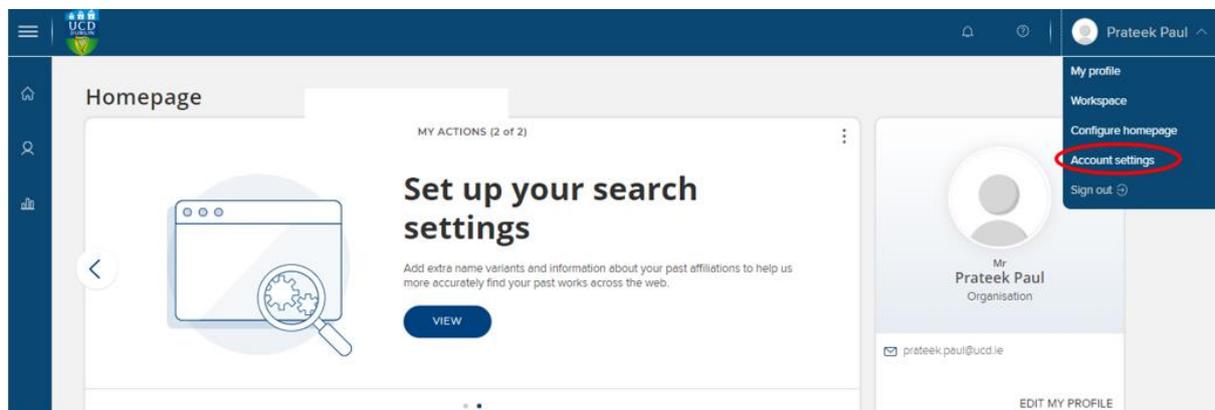
remove and click the *red X*. Please note that this will not delete the grant (or any other object), but only the relationship between the objects.

You can also click the *Edit* icon, which will open a window you can use to update information about the link.

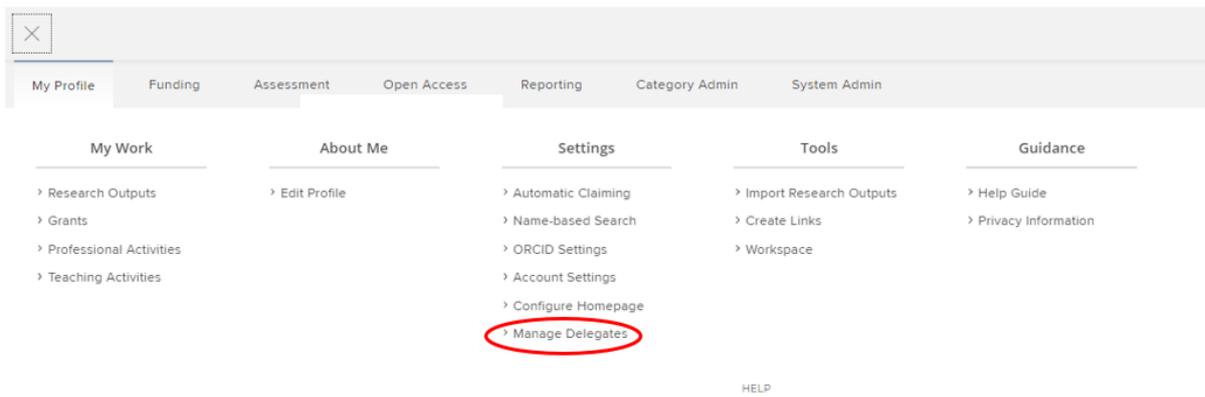
## Manage Delegates

You can grant a delegate (or delegates) editing rights to your account under Account settings.

To go to account settings, you can follow either path, click on the drop down over your name and icon present at the top right-hand side corner of your page and select **Account Settings**.



Or, follow *Menu* → *My Profile* → *Setting* → **Manage Delegates**



Your delegate(s) will receive copies of your email alerts and will be able to log in (using their own credentials) and 'impersonate' you to manage and edit your records. You can add more than one delegate.

## Research Manager Role

1. What a Research Manager can do?

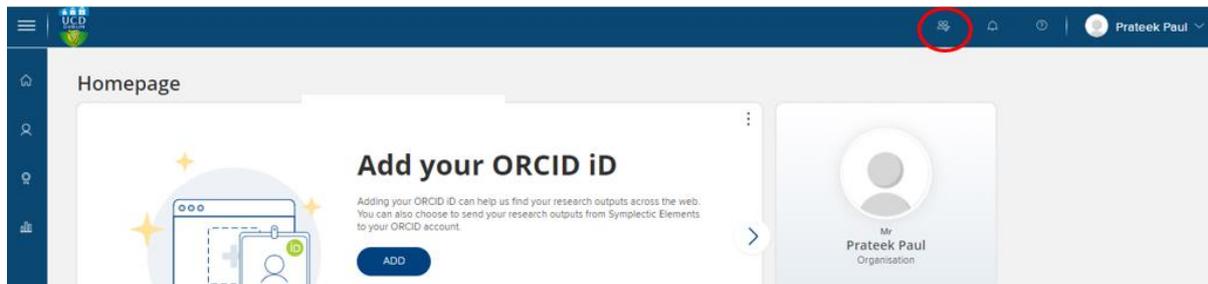
### Rights for Research Managers role

Activity Type	Group Administrator	Research Manager	Statistician	Assessment Reviewer
Change module settings	✓			
Edit deposit advice	✓			
Edit group	✓			
Edit members of group	✓			
Edit Open Access policy	✓			
View search errors in Admin dashboard	✓	✓		
Email group members	✓	✓		
Impersonate all members of a group	✓	✓		
View members of a group	✓	✓		
View profile statistics of group members	✓	✓	✓	
View and download group custom reports		✓	✓	
Edit search settings and clear pending for a group member (when impersonating)		✓		
Deposit publications on the users behalf		✓		
Review research assessment exercises				✓

## 2. How to impersonate another user

As a Research Manager, you have the right to impersonate all members in your group to help people with the day-to-day management of their records.

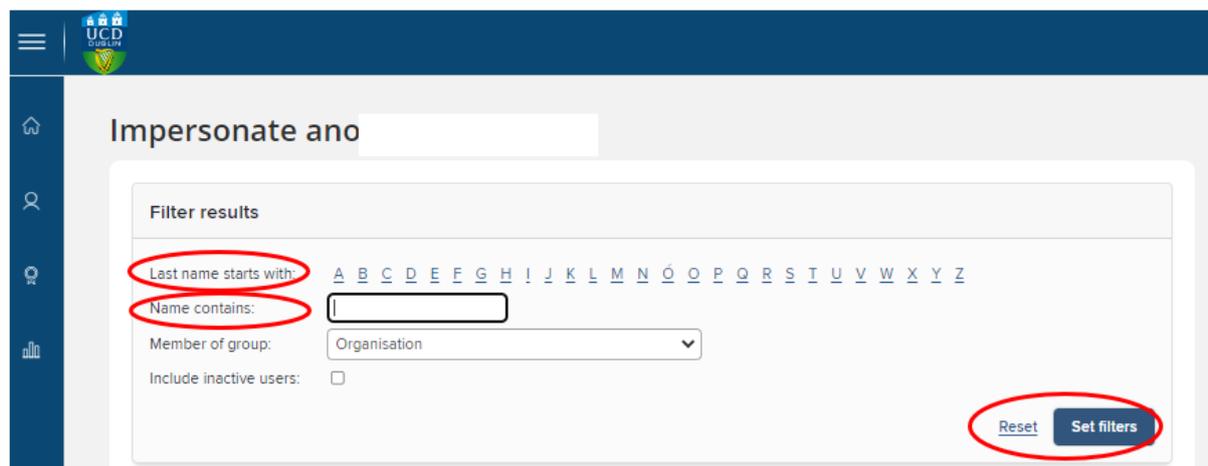
When you log into Elements, you should see a button on the top right side of the Home page as two persons icon, symbolising to impersonate.



The list of every user you have the right to impersonate will be presented with an alphabetical order at the bottom of the page. You can choose an end user by clicking on the user name. In addition to scrolling through the list, you can set filters either by clicking on letters (by last name) or simply type the name of an individual user in the *Name Contains* search box and then click on *Set Filter*.

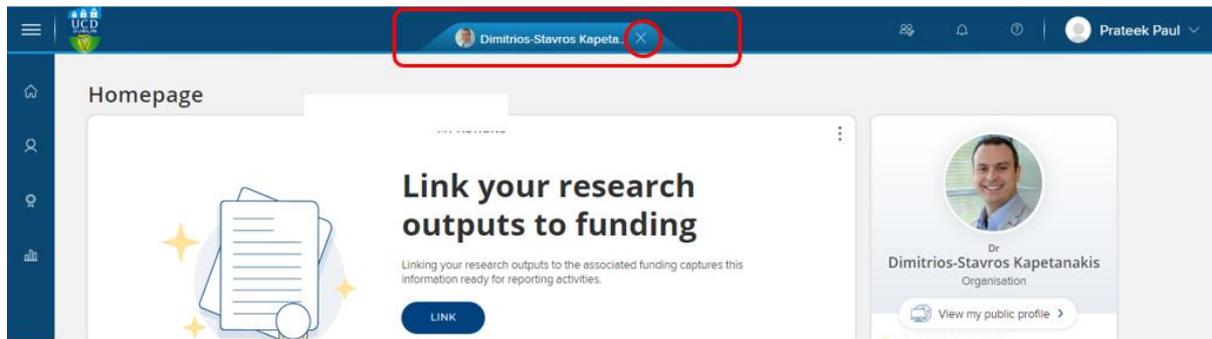
If you're a Research Manager for Multiple groups (that can happen), you'll also see the "Member of Group" dropdown so you can restrict your searches to a particular group.

You can include inactive users by ticking the relevant box or reset your filters by clicking the *Reset* button.



Clicking on a user's name will take you to their Home page. In the tool bar at the top of the page, there will be a tab showing the name of the user and a photo if one has been uploaded.

When you have the role of Research Manager and you impersonate an end user, your actions are recorded in the history of an item. You can end impersonate user mode by clicking on **X** symbol on user's icon on the top.



### 3. What a Research Manager can do while impersonating?

While impersonating a user, the Research Manager can do anything the end user does: Modify search settings; approve or reject publications; merge or split records; add manual records; create links between publications and other data types; or deposit items into the institutional repository.

Note: The user does not have to grant any rights to a Research Manager in order for the Research Manager to perform these activities. This is distinct from a Delegate, a person to whom the user explicitly grants those rights. Users can elect a Delegate by clicking on *Menu* → *My Profile* → *Setting* → *Manage Delegates*. For more details see Manage Delegates section above.

### How to log out from the system

To log out, click on the drop down over your name and icon present at the top right-hand side corner of your home page and select **Sign Out**.

