

Administrator and Workgroup Editor Guide

Note

The definition of words in italics can be found in the [glossary](#).

This section details the additional functionality available for users with **administrator and workgroup editor rights** on *Research Professional. This functionality focuses on giving you ways to share information with other *Research Professional users at your institution and managing user accounts at your institution. Administrators and workgroup editors have different levels of functionality available to them:

Administrators can create shared resources for other users to access, create and delete **workgroups**, email resources to groups of users, create magazines, create new user accounts, and edit or delete existing accounts.

Workgroup Editors share much of the same functionalities as administrators, they are able to share resources with users and members of workgroups, but they do not have the same user management privileges as **administrators** in terms of creating, editing, and deleting user accounts

Throughout the rest of this section, it will be highlighted whenever the feature being discussed is only accessible to **administrators**.

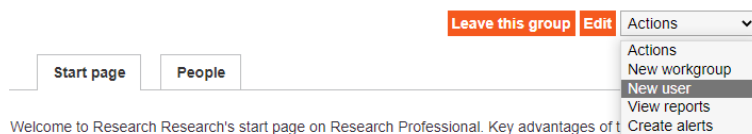
Individual users may be granted **administrator** and **workgroup editor** rights for specific workgroups as well as for the entire institution. Any rights granted will be active for the workgroup they were allocated for, including any of its sub-groups.

Creating, editing, archiving and deleting users

Administrators only

Administrators can manage users from the **Our Institution** section and can take the following actions:

Create a user: click on the **Actions** drop-down and select the **New user** option. Fill in all the mandatory fields and then click **Create** at the bottom of the page. Please note that you will be asked to set a password for the users, but after creating the account, the user will automatically receive an email notifying them that an account has been created on their behalf and prompting them to set a new password for themselves.



Edit a user: open the **People** tab and search for the user you want to edit using their name or email address. Click on the user's name to view their profile, then select **Edit profile** to update their account details.

Leave this group Edit Actions

Start page People

Search for group members This group only

Search

Previous 1 2 3 4 5 6 7 8 9 10 Next

Group Members	Profile
QA Admin	Full Name: Mr Martin Atkinson
Amanda Allen	Email: ma@researchresearch.com
Lenny Antonelli	Role: Administrator
Mr Martin Atkinson	Edit profile Edit alerts Archive
Nick Bannister	

Archive a user: open the **People** tab and search for the user as described above. Click **Archive** to add the user to the **Archived Users** folder. The user will be unable to log in and will stop receiving email alerts. From there, **Administrators** have the option to either restore or permanently delete the user account.

Start page People Expressions of Interest

Search for group members This group only

Search

Previous 1 2 3 Next

Group Members	Profile
Dick Ahlstrom	Full Name: Dick Ahlstrom
Shweta Gujral Arora	Telephone:
Mr Martin Atkinson	Email: dahlstrom@irish-times.ie
Crafty Banana	Member Edit profile Archive

Delete a user: open the **People** tab and change the group member search from **This group only** to **Archived Users** in the dropdown and then click **Search** to see all archived users. Select the name of the users you wish to restore or permanently delete from the *Research Professional system and click either the **Restore** or **Delete** button. After restoring an account, the user will again be able to log in and any previously registered email alerts will be reactivated.

Leave this group Edit Actions

Start page People

Search for group members Archived users

Search

Previous 1 2 3 4 Next

Group Members	Profile
Lilian Anekwe	Full Name: Lilian Anekwe
Shweta Gujral Arora	Email: lilian.aneke@researchresearch.com
Dominic Bevacqua	Role: Member
Claire Braun	Restore Delete
Morgane Brun	

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 edit the title of the page, update the workgroup description, apply basic formatting, and insert external links.

Edit

Full name

Shortened name
 (Appears in the top right corner of the site)

Description

B ***I*** **U**   

Welcome to Research Research's start page on Research Professional. Key advantages of the site include:

An **intuitive interface** to make browsing for funding as simple as checking your email.

Shared resources, allowing you to benefit from saved searches and folders of bookmarked items created for you by your administrators.

- Powerful search tools to help you find exactly the funding opportunities and news articles that interest you.

Shared resources

You can share saved searches and folders of bookmarked funding opportunities and news articles on to workgroup pages for other users to access.

To save and share a search with a workgroup, create a search in either the funding or news section and click the **Save to Workgroup** button. In the save pop-up, you will see a list of all of the workgroups you are able to share resources with. Select the workgroup you want to share the saved search with, give the search a name (or select an existing saved search to overwrite), and click **Create**. The saved search will be posted to the workgroup's **Start page** and will be visible to any users who view the workgroup.

Save to a Workgroup ✕

Symbolises read-only workgroups with editable children

Your Workgroups:

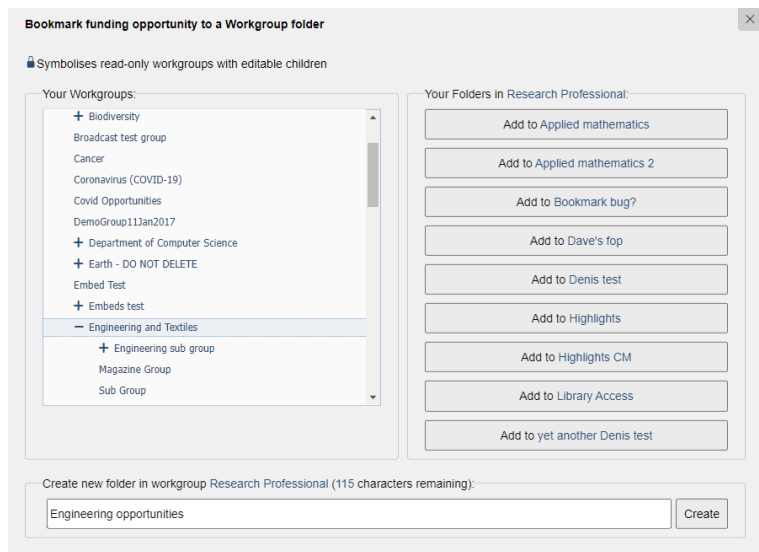
- Africa TIA queries
- + Art and Humanities
- + Biodiversity
- Broadcast test group
- Cancer
- Coronavirus (COVID-19)
- Covid Opportunities
- DemoGroup11Jan2017
- + Department of Computer Science
- + Earth - DO NOT DELETE
- Embed Test
- + Embeds test
- + Engineering and Textiles
- + Faculty of Arts

Your Searches in Engineering and Textiles:

-
-
-
-
-
-

Create new search in workgroup Engineering and Textiles (129 characters remaining):

To save and share a folder of bookmarked opportunities or articles with a workgroup, select the items from your search in either the funding or news section, and from the actions drop-down menu, click **Bookmark to Workgroup**. In the bookmark pop-up, select the workgroup you want to share the bookmarked folder with, give the folder a name, and click **Create** to post it to the workgroup's start page.



Generating usage reports

Administrators 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.

To view a usage report, open the workgroup you wish to generate a report for. From the **Actions** drop-down menu and select **View reports**, and then select the report and the format you wish to download.

Download report

The available reports are listed below, with a description of what is included in each.
To download any of the reports, click on the link for the format you require.

Institution summary XLSX XLS PDF
 A summary of users' activity on the site:
 for all time from date

User activity (in this group) XLSX XLS
 A user-by-user breakdown showing detailed information about each user and their activity. Includes information on users in this group only.

User activity (in this group and all subgroups) XLSX XLS
 As above. Includes information on users in this group and all groups below it in the hierarchy.

User activity over time XLSX
 A user-by-user breakdown of logins and searches saved during a specified period.
 from date *
 to date

Group membership XLSX XLS PDF
 A list of users broken down by workgroup to show the membership of each workgroup, and which users are marked as administrators or editors.

Fingerprints XLSX
 A list of the fingerprints generated for researchers at this institution, including information on which of those have been matched to user accounts.

Annotations XLSX
 A list of the annotations made by administrators at this institution.

[Close](#)

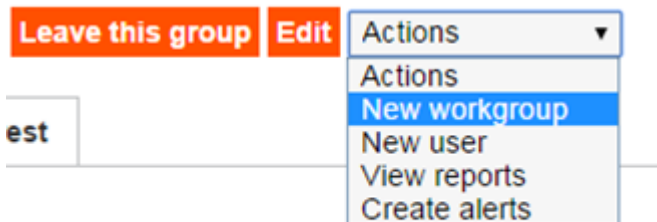
Creating workgroups

Administrators only

If your institution has a **Networked** level subscription, you will have the ability to create multiple **workgroups**. Current workgroups at your institution can be seen on the right-hand side of the page, under the **Our Hierarchy** heading.

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-workgroups.

To create a new workgroup, the administrator will need to select the parent workgroup and from its start page, select **New workgroup** from the Actions drop-down.



In the pop-up window, you are able to give your workgroup a name and add a description to its **start page**. Click Save at the bottom of the pop-up, and your workgroup will now appear listed in the **Our Hierarchy** section.

Emailing workgroups

You can email links to searches, folders of bookmarks or individual items from, both the **Funding** and **News** sections, to all members of selected workgroups:

To share a saved search via email, select **Email** from the **Actions** drop-down.

To share a bookmarked folder via email, open up the folder you wish to share and then click **Email** to the right of the folder's title.

To share selected items via email, tick the box next to the items you wish to share and then select Email from the **Actions** drop-down at the top of the list of search results.

In the pop-up window, select the workgroup you wish to send the search, bookmarked folder, or selected items to, enter an optional message in the **Message** section, and click **Send** to email your links to the members of that workgroup.

Managing workgroup membership

Administrator only

You can control which users at your institution are members of a given workgroup and assign different roles to them within that workgroup (member, workgroup editor, administrator).

To assign a specific role to a user, open the workgroup you wish to manage the membership of, and then go to the **People** tab.

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

Click on the user's name to view their profile and then use the drop-down under their email address to change their membership status. Changes will be saved automatically.

Note

Users who have been provided administrator or workgroup editor rights will have those rights in the workgroup in question and all of its subgroups.

Annotations

If your institution has a **Networked** level subscription to *Research Professional, **administrators** can **annotate** funding opportunities to add additional information such as internal deadlines or internal contacts onto the call abstract. This information will *only* be visible to users from the administrator's institution who view the opportunity.

In the **Funding** section, run a funding search and then select the items you wish to annotate from the search results list by ticking the boxes next to the closing dates.

From the **Actions** drop-down at the top of the search results, select the type on annotation you wish to apply; **deadline**, **note**, **contact** or **priority**.

The screenshot shows a search results page with 42 results. At the top, there is a 'Bookmark' button and an 'Actions' dropdown menu. The 'Actions' menu is open, showing options: Actions, Bookmark to Workgroup, Download, Advanced Download, Email, Add to Magazine, Add Deadline (highlighted), Add Note, Add Contact, and Add Priority. Below the menu, there is a table of results. The table has columns for 'Closing date', 'Title', and 'Amount'. The first row is for 'September 21' with a closing date of '30 Sep 21' and a title 'EXTENDED DEADLINE: Policy and engagement fellowship digital research infrastructure'. The second row is for 'October 21' with a closing date of '04 Oct 21' and a title 'Policy internships'. The third row is for '05 Oct 21' with a title 'Research the hidden histories of environmental science' and an amount of '£100,000'.

Closing date	Title	Amount
September 21		
<input checked="" type="checkbox"/> 30 Sep 21	EXTENDED DEADLINE: Policy and engagement fellowship digital research infrastructure Arts and Humanities Research Council, GB and other funders	
October 21		
<input checked="" type="checkbox"/> 04 Oct 21	Policy internships UK Research and Innovation, GB and other funders	Not specified
<input type="checkbox"/> 05 Oct 21	Research the hidden histories of environmental science	£100,000

In the pop-up window, enter the required information for your annotation type, then click **Annotate** to add the annotation.

Your annotation will be displayed in the items description of the specific funding opportunity you have added the annotation to. It will be visible to all users from your institution who view that item.

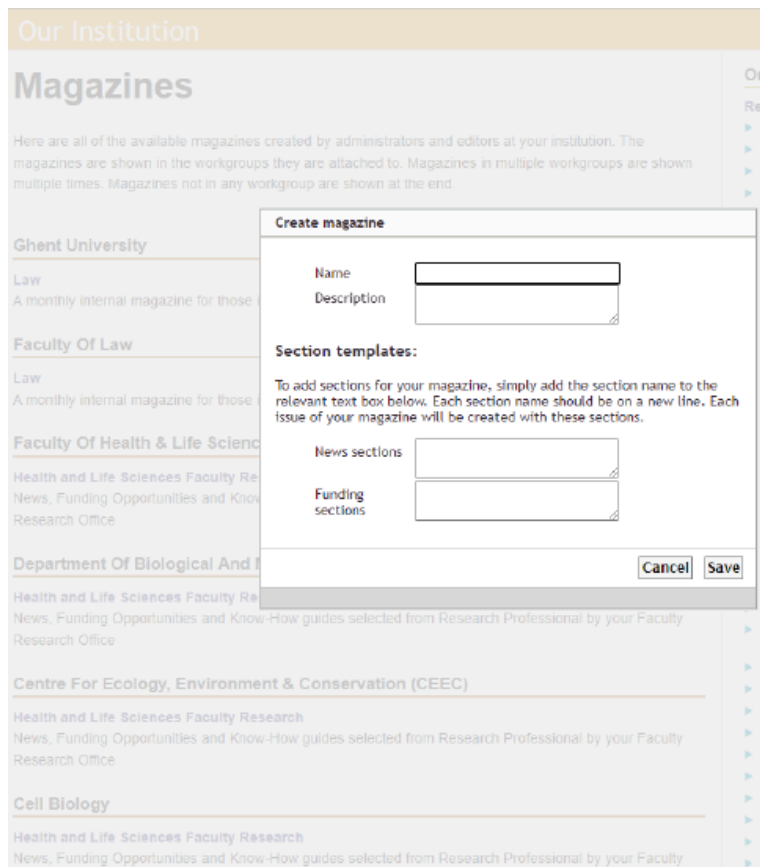
The screenshot shows a pop-up window titled 'Create note annotation'. It has a close button (X) in the top right corner. The window contains a 'Title' field with a text input box. Below it is a 'Note' field with a larger text area. At the bottom, there is a 'Delete annotation: Never' section with a checkbox and a date field 'On: 13/09/2021'. At the very bottom are two buttons: 'Annotate' and 'Cancel'.

Magazines

If your institution has a **Networked** level subscription to *Research Professional, **administrators** and **workgroup editors** have the ability to create **institutional magazines**, containing funding opportunities and news articles drawn from elsewhere on the site. The magazine can be emailed to selected individuals or to all members of relevant **workgroups**.

To create a magazine, go to the magazines home page. You can navigate there by clicking the **See all Magazines** link from any workgroup page.

Click New at the top right corner, enter a name and a short description for your magazine, and define the news and funding sections (e.g. **Breaking News** or **International Funding**). Then click **Save**, and you will get redirected to your magazine's summary page.



To create an email list for your magazine, click on **Edit email list** from the **Actions** drop-down.

From the **Users** tab, you can search for any individuals you want to send the magazine to. Click **+** to add them to the email list.

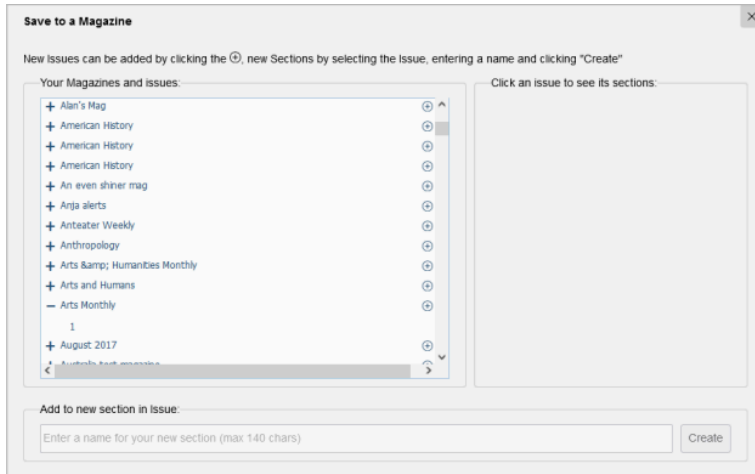
From the **Groups** tab, select any workgroups you want to send the magazine to. All of the workgroup's members will be emailed any new issues that you publish in the future.

To add content to your **Magazine**, run a search for either opportunities or articles, and then select the items you wish to add by checking the box next to the item in the list of search results.

Select **Add to Magazine** from the **Actions** drop-down.

In the pop-up, select the magazine you wish to add the content to. You will then be able 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**.



To publish and email your magazine, open the issue you wish to publish and review the content, then click the **Publish** button to publish the issue. This will make it visible to all users at your institution. After publishing the issue, click **Email** to send the issue as a html email to everyone on the email list for the magazine.