

# ResearchProfessional Quick Start Guide

## Welcome to ResearchProfessional...

**ResearchProfessional** is the new research funding and news service from ResearchResearch. It gives you access to an extensive database of funding opportunities and news items, as well as the tools to find the content most relevant to you.

This guide will help you take your first steps with **ResearchProfessional**, and should provide all the information you need to get up and running.

More detailed information is available from the online User Guide.

## Accessing the site...

When you first go to the new site, you will have three options:

**Sign in:** if you already have a **ResearchProfessional** account, enter your username and password.

**Register:** If you don't yet have a personal account, follow the on screen instructions to set one up. (You can only do this if you are accessing the site from on campus)

**Campus Access:** If you are using a computer physically located at your institution, you can access **ResearchProfessional** without signing in to a personal account. However, certain features will be unavailable, and you will not be able to save your work.

## When you first enter the site...

The first time you sign in to the site using your personal account you will be presented with the 'induction' screens.

A simple step-by-step process will help you set up for your account.

You will be able to:

- add yourself to a group within your university
- bookmark and get email alerts on shared resources (i.e. folders of bookmarks and saved searches set up by your colleagues)
- set up simple funding opportunity alerts
- choose to receive any available magazines via email.

Instructions on exactly how to do this will appear on screen during the induction process. Once this process is finished, you'll be ready to use the site!

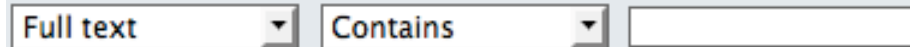
The first page you'll see following this is your institution's 'start page'. This has a short introduction and a list of shared resources (i.e. folders of bookmarks and saved searches set up for you by your colleagues). It also has a set of 'Quick links', to take you to the various sections of the site

# Funding & News

## To build a search...

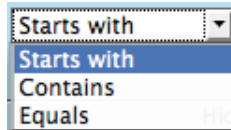
At the top of the centre panel you will see this 'Search bar':

i)                      i)                      iii)



i) Select a property to search with, like 'Sponsor name' or 'Closing date'.

ii) Select the operator to apply to the search property.  
e.g. Searching on 'Sponsor name' would present a set of operators like this:



iii) Dependent on the property and operator you choose, the third box will either allow you to enter text, or to select from several options. The main options for this are:

- Free text
- Date selector (you can enter the date manually or use a date picker to choose your required date)
- Item selector (you get a 'Select' button to choose the your options. Clicking it pops up a window for you to choose the option(s) you want to base your search on)

Next to the first search criteria, you will see the following buttons:



These allow you to manage your search criteria in the following ways:

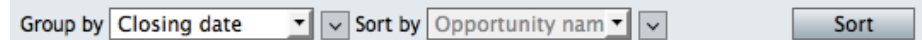
- + add a new criterion.
- remove this criterion.
- ↓ ↑ re-order the criteria.

Hit the 'Search' button to run the search – the results will be displayed below the 'Search bar'.

## To sort your search results...

The 'Sort bar' is found directly below the 'Search bar' and allows you to control the order in which your results are displayed.

i)                      ii)                      iii)



i) Choose a method for grouping your results. This arrow lets you toggle between ascending or descending order

ii) Sort results within the primary grouping, with the arrow button again controlling the order in which the sort is

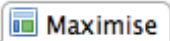
applied. (**Note:** This second option is not available when grouping by date.)

iii) Click  to apply your sorting criteria.

### To select an item to view...

To view an item, click on its title. The item will be highlighted in blue to show it has been selected.

The details of the item are now displayed in the Preview panel on the right. Clicking on the grey bars in the panel will reveal different information about the item, such as sponsor information for a funding opportunity, or related links for a news article.

Click on the 'Maximize' button, , to expand the view of the highlighted item. The search results will be hidden, giving more space to view the opportunity. Clicking 'Minimize' returns to the original view.

To select multiple items, click on the checkboxes for all of the items you want to select. Each item you select will show a tick in this box and appear highlighted. The preview panel will show you how many items you have selected.

### To save a search...

Click anywhere in the grey search bar, other than on the buttons or menus. The bar will be highlighted in blue to show that it is selected.

The 'Save' button, , will flash yellow. Click on it.

In the pop up window that appears, click 'Save as' and then enter a name for your search in the window that appears. Click on 'Save'.

Your search will be saved in the 'Saved searches' folder in the left panel.

### To re-run a saved search...

In the panel on the left, click on 'Saved searches' to see the names of all the searches you have saved.

Click on the name of the search you wish to re-run.

The criteria from that search will appear in the 'Search bar', and the results will be displayed in the 'Search and listing panel' in the centre of the screen.

## To bookmark an item...

Check the box to the left of any item you wish to bookmark. You can bookmark more than one item at a time.

Click on the 'Save' button.

You can now choose to either create a new folder by entering a name into the box provided, or add the items you'd like to bookmark to an existing folder by selecting the existing folder from the list. Once you have made your decision, click 'Save'.

The item(s) will now be saved in whichever bookmarks folder you specified.

## Using shared resources...

Shared resources are saved searches or folders of bookmarks created by your workgroup editors or administrators. They can be found on institutional or workgroup start pages under one of the following four headings:

- Funding folders – folders of bookmarked funding opportunities
- Funding queries – saved funding searches

- News folders – folders of bookmarked news articles
- News queries – saved news searches

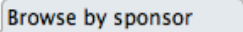
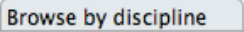
To view a shared resource, click on its name. You will then see the relevant saved search or set of bookmarked items in the centre panel. From here you have the option to save the shared resource to your own personal account or to create a shortcut to the shared resource.

To save a shared resource for future reference, click anywhere in the grey search panel to highlight it in blue and click the 'Save' button. You will now be presented with a pop up window offering you three choices: 'Save as', 'Shortcut', or 'Cancel'.

'Save as' allows you to save your own copy of the search or folder. This will appear in your 'Saved searches' or 'Bookmarks' section in the left panel, depending on the type of shared resource. Any future amendments made by workgroup editors or administrators to the resource will not be reflected in your personal copy if you choose this option.

If you click 'Shortcut', the saved search or items will be added to your 'Institution resources' folder in the left hand panel. If the workgroup editors or administrators amend this resource, these changes will be reflected next time you click on the resource.

## To browse for funding...

When in the funding database, instead of searching you can browse by sponsor or discipline. Click on the appropriate tab,  , to begin browsing.

There are two browsing options near the top of the screen:

**A-Z:** Select a letter and see all sponsors or disciplines beginning with that letter.

**Search:** Type in a word or phrase to search on, display any sponsors or disciplines matching that search.

When browsing by discipline, you can also:

**Browse Rodman Index:** Browse a list of all the available discipline terms, arranged in their three-level hierarchy.

Once you have selected a sponsor or discipline, you will be able to view all funding opportunities related to it.

## To browse the magazine archive...

In the News panel on the left, click on the title of the magazine you wish to view.

This will expand a list showing the five most recent issues, as well as a series of folders divided by year. Navigate through the folders to find the issue you want, then click on it to view that issue in the centre panel.


The layout for magazine browsing is slightly different to the basic search layout. The centre panel with the listing of news or funding opportunities is much smaller, with more space for viewing the stories or opportunities on the right.

Two tabs at the top of this panel will allow you to switch between viewing the issue's news and funding opportunities (assuming it features both types of content). By default, News is selected. When you switch to Funding you will see a list of the funding opportunities from that magazine along with their deadline and the name of the sponsor.

In the larger panel, on the right, you will be able to see the full article or funding opportunity you have selected. Items can be bookmarked here in the same way as they were in the basic funding search view.

# Forums

## To use the forums...

First of all, click on the Forum button,  **Forum** , under the Forum section in the left hand panel of the site. A list of the available forums will be displayed in the panel in the centre of the screen. Click on one to view it.

This will display the names of all the threads active on that forum: again, click on the name of the thread you wish to view.

To reply to the thread you are viewing, click the 'Post reply' button in the top-left.

Type a message into the text box and click 'Submit'.

Return to the forum by clicking on its name in the grey bar near the top of the screen.

To start your own thread click on 'New topic' in the top-left.

Give your thread a title using the 'Subject' box and add the text of the first post into the box below.


Click 'Submit' to post your thread to the forum for other users to view and reply.

# Profile & Alerts

## To view your profile...

Click on your name at the top right hand side of the screen.

## To edit your user profile...

Click the Edit button,  , which appears directly below your name in the contacts panel, and the fields that make up your profile will be displayed in the centre panel. Enter new information or change existing entries then click the 'Save' button in the bottom right corner of the page to confirm your changes.

**Note:** The 'First name', 'Last name' and 'Main email' fields are required, so you will not be able to save your changes if you clear any of this information.

## To edit your alerts profile...

Click the 'Alerts' button under the 'Contact' heading.

The names of all of your saved searches will be listed in the centre panel, with a checkbox next to each.

Check the box next to a search to add it to your alerts profile, then click the 'Save' button in the bottom right corner of the

page to confirm your changes.

You will now begin receiving periodical email alerts on any new items that match your chosen search criteria.

### To edit your alerts profile...

Click the 'Alerts' button under the 'Contact' heading.

The names of all of your saved searches, will be listed in the centre panel, with a checkbox next to each. Also listed here are any shared saved searches (i.e. those created by workgroup editors or administrators) that you have saved to your profile. You can also elect to receive alerts on these.

Check the box next to a search to add it to your alerts profile, then click the 'Save' button at the bottom of the page to confirm your changes.


You will now begin receiving weekly email alerts on any new items that match your chosen search criteria.

### To edit your magazine subscriptions...


Click the 'Subscriptions' button under the 'Contact' heading.

A list of all of the magazines you have access to will appear in the centre panel. Check the boxes next to any magazines you wish to receive via email and then click on 'Save' at the bottom of the page.

### To edit your group membership...

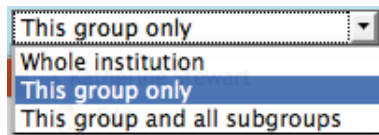
Click on the 'Group membership' button,  [Group membership](#) to see a list of available workgroups in the centre panel. Those of which you are already a member will have a tick in the checkbox next to them. To become a member of any of the groups you can see, simply check the appropriate box. Remember that administrators and workgroup editors can change your member status and add or remove you from groups over which they have editorial privileges.

### To redo the induction process...

The Induction button,  [Induction](#), can be pressed at any time to take you back through the induction process to completed when you first logged on to the site. You can use this to revise all of your group, alerts and subscriptions options whenever you like.

## To view other people's profiles ...

Under the 'Contacts' heading, below your own profile, you will see a list of the other users in your workgroup, or in your whole institution, depending on which option you choose in the drop down menu below the search box:



Click on a user to view their profile in the centre panel.

You can search for a user by typing a name into the box at the top of the panel, or browse using the 'next' and 'previous' buttons at the bottom of the list. You can search for users only in your group, within this group and all subgroups or within your entire institution, using the drop down menu mentioned above

To return to the full list of users, clear the contents of the search box, and click on 'Search' again.