

# Converis Research Output Capturing

The South African Technology Network:

Cape Peninsula University of Technology (CPUT)

Central University of Technology (CUT)

Tshwane University of Technology (TUT)



# Overview

## Goals:

- To make sure that roles involved in PubCount can create (either manually or via import) publications and send them through the workflow for review and validation.
- To solicit feedback from potential users about the forms and if adjustments should be considered to make them more user friendly by changing labels or adding instructions or hint text.

## Notes:

For testing purposes, users will create or import records for 2017 (records can be reflect actual research outputs or sample outputs to test functionality).

# Capturing as a Researcher

# Researcher Goals

## Can I:

- Easily navigate my dashboard
- See information about myself
- Create new publications
  - By importing them from external sources
  - By creating them manually and filling in data
  - By importing them by BibTex file or similar
- Fill in the fields that are necessary
  - Are the right fields available to me to fill in? Are other fields that I should not access frozen?
  - Are the labels and instructions helpful?
  - Should hint text be added or instructions revised?
- Save the record in the draft status and return to it later to edit
- Send the records forward for review
- See the records in my list after sending them for review
  - Filter through them to organize my records

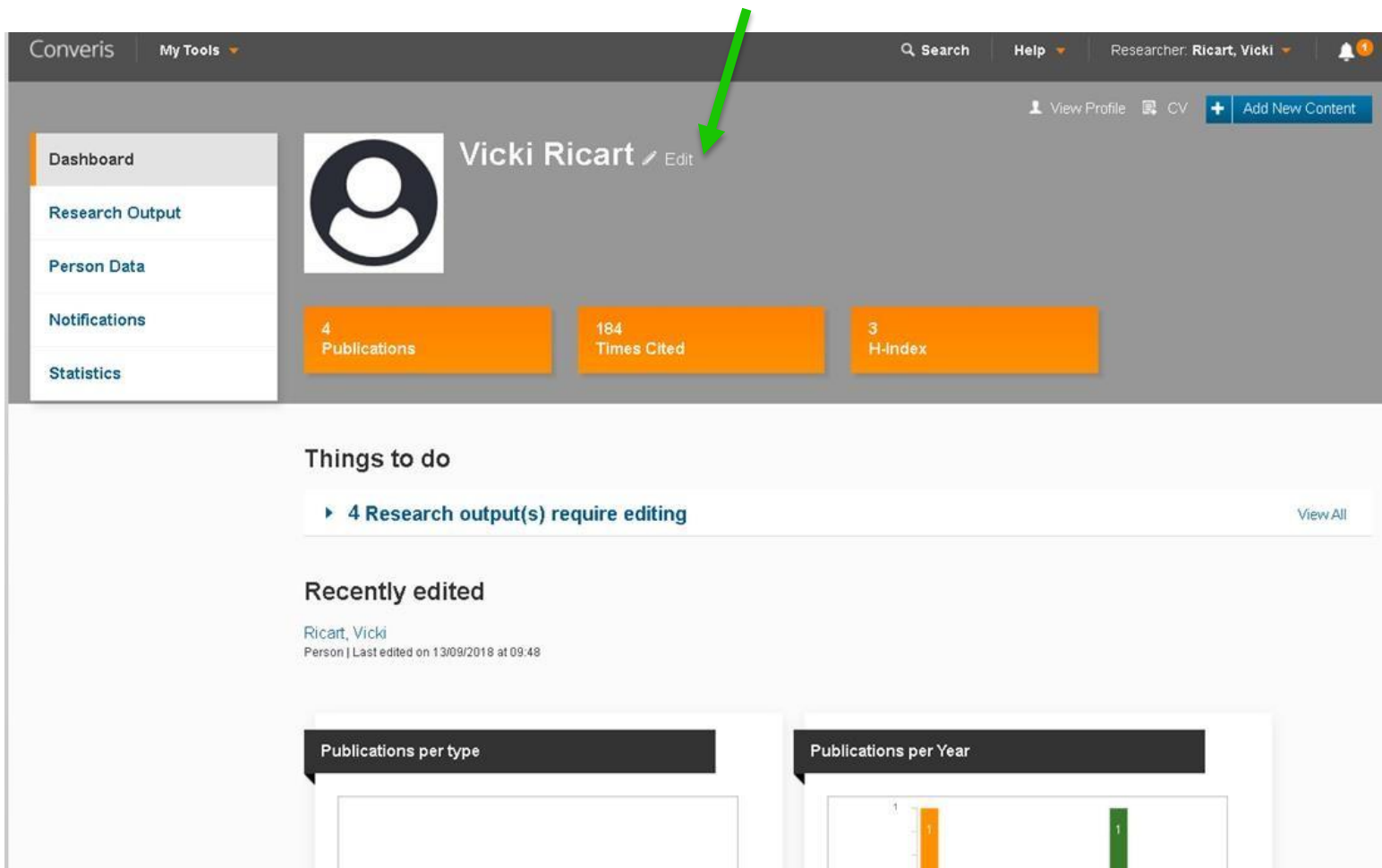
# Your Dashboard

Your Dashboard contains basic information about you, an “inbox” of items requiring your attention, menu items that can be clicked on to view records you have access to, and the ability to create new content.

The screenshot shows the Converis dashboard for user Vicki Ricart. The interface includes a top navigation bar with 'Converis', 'My Tools', 'Search', 'Help', and 'Researcher: Ricart, Vicki'. A left sidebar contains menu items: 'Dashboard', 'Research Output', 'Person Data', 'Notifications', and 'Statistics'. The main header area displays the user's profile picture, name 'Vicki Ricart', and an 'Edit' link. Below this are three orange summary cards: '4 Publications', '184 Times Cited', and '3 H-Index'. A 'Things to do' section highlights '4 Research output(s) require editing' with a 'View All' link. A 'Recently edited' section shows 'Ricart, Vicki' as the user, with a note 'Person | Last edited on 13/09/2018 at 09:48'. At the bottom, two charts are partially visible: 'Publications per type' and 'Publications per Year'.

# Data Display Review

To view your personal information click “Edit” next to your name on your Dashboard.



The screenshot shows the Converis dashboard for a researcher named Vicki Ricart. The interface includes a top navigation bar with 'Converis', 'My Tools', 'Search', 'Help', and 'Researcher: Ricart, Vicki'. A left sidebar contains navigation links for 'Dashboard', 'Research Output', 'Person Data', 'Notifications', and 'Statistics'. The main content area features a profile card for Vicki Ricart with a circular profile picture and an 'Edit' link next to her name, which is highlighted by a green arrow. Below the profile card are three orange boxes displaying statistics: '4 Publications', '184 Times Cited', and '3 H-Index'. Further down, there is a 'Things to do' section with a notification that '4 Research output(s) require editing' and a 'View All' link. Below that is a 'Recently edited' section showing 'Ricart, Vicki' as the user, with a note that the profile was last edited on 13/09/2018 at 09:48. At the bottom, there are two chart sections: 'Publications per type' and 'Publications per Year', both of which are currently empty or partially obscured.

# Data Display Review

After opening up your record, check to see the accuracy of what has been imported from your HR system. If you notice inaccuracies please contact your university's project manager.

On the Key Information tab you will find your personal information.

## Ricart, Vicki

Publicly visible Internally visible Active ... Admin Info

Key Information \* [Work Affiliations](#) [Research Profile](#)

**Person Details \***

Academic title

First name \*

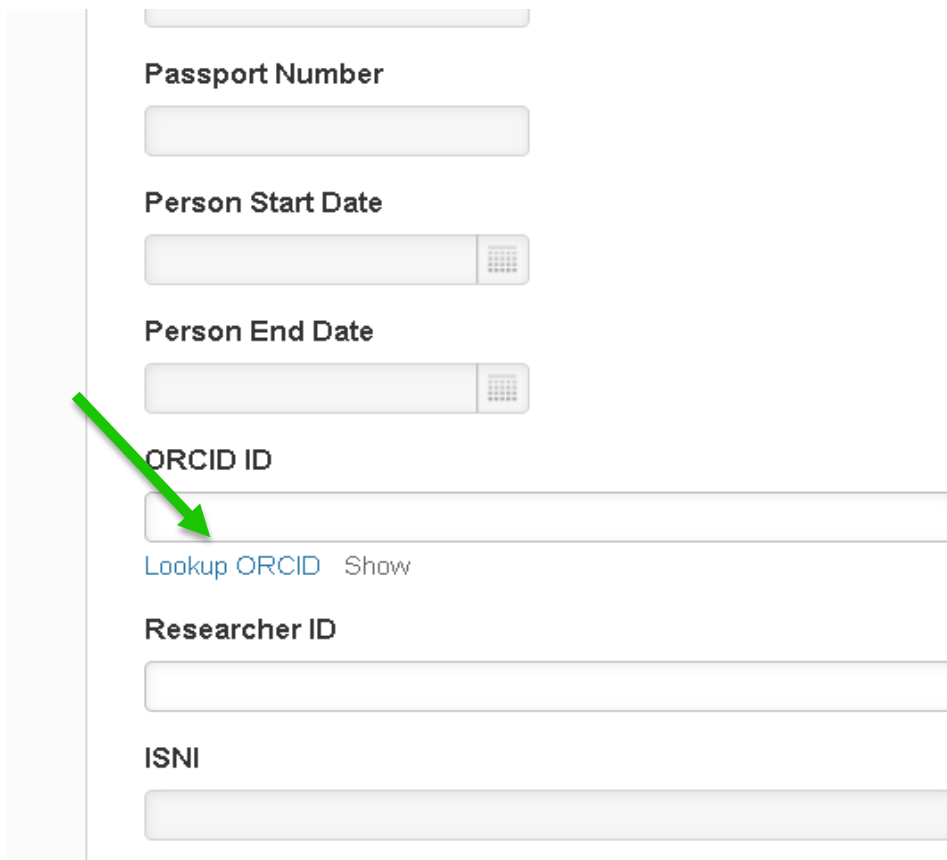
Middle name

Last name \*

Birth name

# Data Display Review

If you have an ORCID identifier you can search for it by clicking the “Lookup ORCID” link. Converis will search ORCID using your HR information (first and surname as provided).



The image shows a vertical form with several input fields. From top to bottom, the fields are: a blank text field, a field labeled "Passport Number", a blank text field, a field labeled "Person Start Date" with a calendar icon, a field labeled "Person End Date" with a calendar icon, a field labeled "ORCID ID" with a green arrow pointing to it, a field labeled "Lookup ORCID" with a "Show" link, a field labeled "Researcher ID", and a field labeled "ISNI".





If it can't be located, you can type it in and click on “Save”



# Data Display Review

The Work Affiliations tab will have your organisational information related to your current position at your institution.



**Ricart, Vicki**

 Publicly visible
  Internally visible
  Active
  Admin Info

[Key Information \\*](#)
[Work Affiliations](#)
[Research Profile](#)

**Affiliation Details**

Please add all the work affiliations, past and present. Upon creating a new work affiliation, save the information on this page and reopen it to reflect the changes.

	Organisation	Function in the organisation	Status	
1	<div style="display: flex; align-items: center;"> <span style="font-size: 1.2em; margin-right: 5px;">▼</span> <span>South African Technology Network</span> </div>	(-)	Active	 

# Data Display Review

Your Research Profile tab will allow you to add a personal statement about your research interests as well as to add NRF areas and keywords to describe your work.


**Ricart, Vicki**

Publicly visible Internally visible Active Admin Info

Key Information \* Work Affiliations **Research Profile**

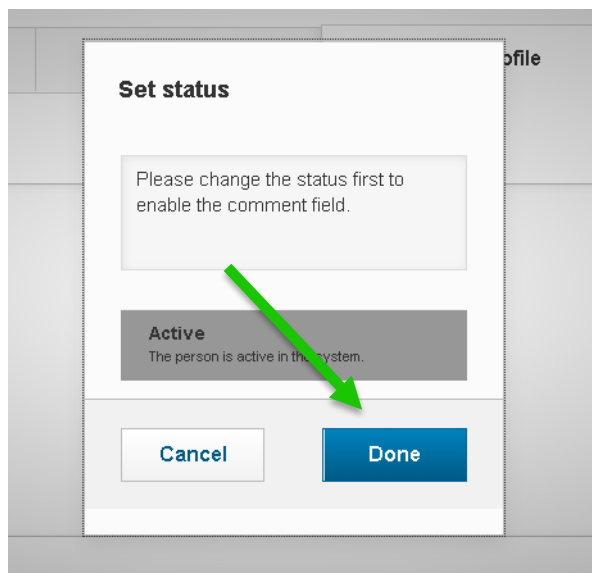
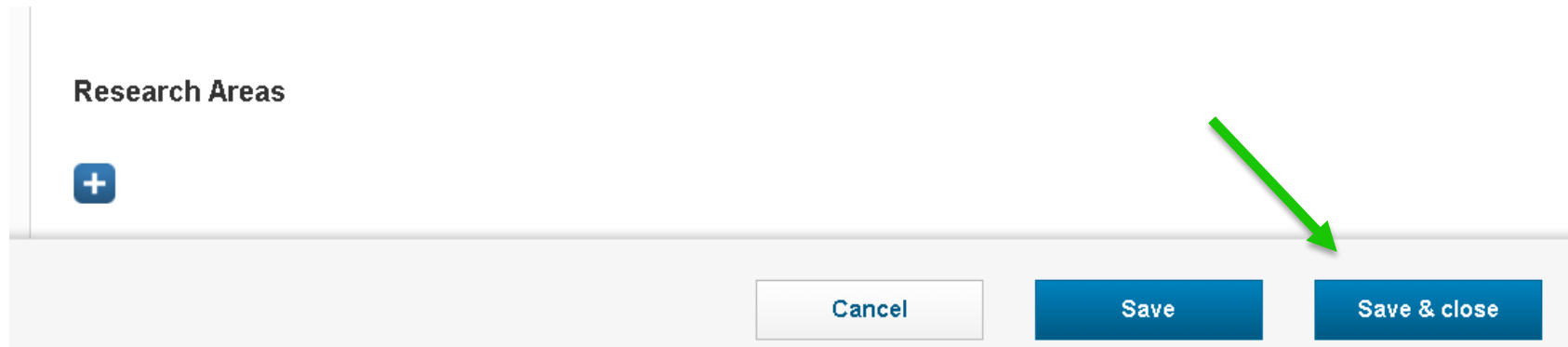
**Research Interest**

**Research Areas**



# Data Display Review

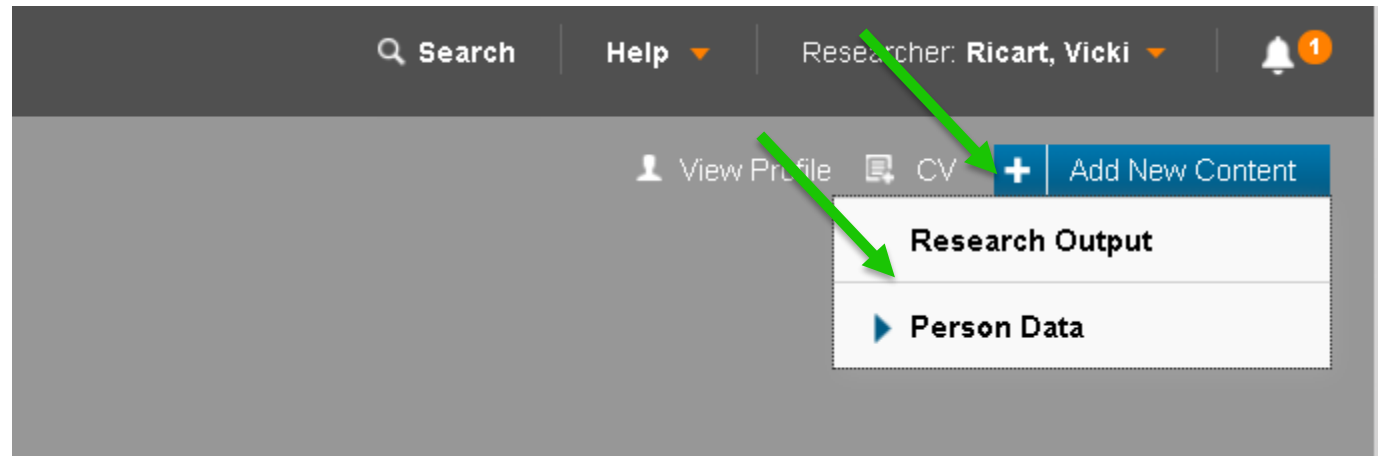
When you have completed reviewing your profile, click “Save and Close” on the bottom right, then click “Done.”



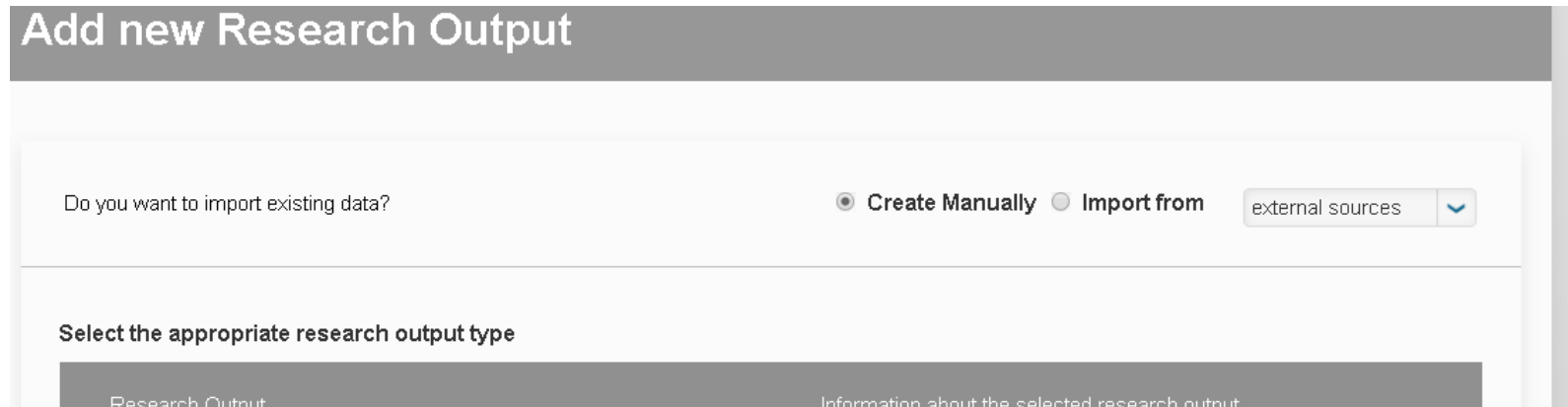
# Publication Import

# Publication Import

From your dashboard, add a new publication by clicking “Add New Content” and then selecting “Research Outputs.”



You will then be presented with the choice between importing publications or creating them manually.

A screenshot of a web form titled 'Add new Research Output'. The form has a light gray header with the title. Below the header, there is a question: 'Do you want to import existing data?'. There are two radio buttons: 'Create Manually' (which is selected) and 'Import from'. To the right of the 'Import from' radio button is a dropdown menu with the text 'external sources' and a downward arrow. Below this section, there is another section titled 'Select the appropriate research output type'. At the bottom of the form, there is a dark gray bar with the text 'Research Output' on the left and 'Information about the selected research output' on the right.

# Publication Import - External Sources

Select “Import from.” If the “external sources” menu item selected you will be presented with the screen below.

**Add new Research Output**

Do you want to import existing data?  Create Manually  **Import from** external sources ▼

**Select author's affiliation**  
 Ricart, Vicki - South African Technology Network (Active)

Click 'Save' to save your current search settings, which will then be available in the drop down below. Your Saved Searches also run on a daily schedule, checking for new matching publications. The system will send an email to the person associated with this search, who was selected on the previous screen.

**Select saved search (optional)**  
Select Saved Search ▼ Save

**Search publications for**  
 Please search using your alias(es), e.g. Smith J; Smith JD, and/or affiliation.

**Web of Science™**  PubMed  Europe PMC  ORCID  SwePub  DNB

Search with ORCID ID of selected person

Ricart V in field authors ▼ Search

  in field all ▼ Clear

\* From year 1900 \* to 2099

Cancel

# Publication Import - External Sources

Enter criteria for your import search. To get focused results, it can be helpful to add criteria in addition to the name you publish under, like a keyword or affiliation.

Add new Research Output

Do you want to import existing data?  Create Manually  Import from external sources ▼

---

**Select author's affiliation**  
 Ricart, Vicki - South African Technology Network (Active)

Click 'Save' to save your current search settings, which will then be available in the drop down below. Your Saved Searches also run on a daily schedule, checking for new matching publications. The system will send an email to the person associated with this search, who was selected on the previous screen.

**Select saved search (optional)**

Select Saved Search Save

---

**Search publications for**  
 Please search using your alias(es), e.g. Smith J; Smith JD, and/or affiliation.

Web of Science™  PubMed  Europe PMC  ORCID  SwePub  DNB

Search with ORCID ID of selected person

Ricart V in field authors ▼ Search

in field all ▼ Clear

\* From year  \* to

Cancel

# Publication Import - External Sources

After clicking “search” you will be presented with results based on the criteria you entered.

Select saved search (optional)

Select Saved Search  Save

**Search publications for**  
Please search using your alias(es), e.g. Smith J; Smith JD, and/or affiliation.

Web of Science™  PubMed  Europe PMC  ORCID  SwePub  ODNB

Search with ORCID ID of selected person

Ricart V in field authors  Search

in field all  Clear

\* From year 1900 \* to 2099

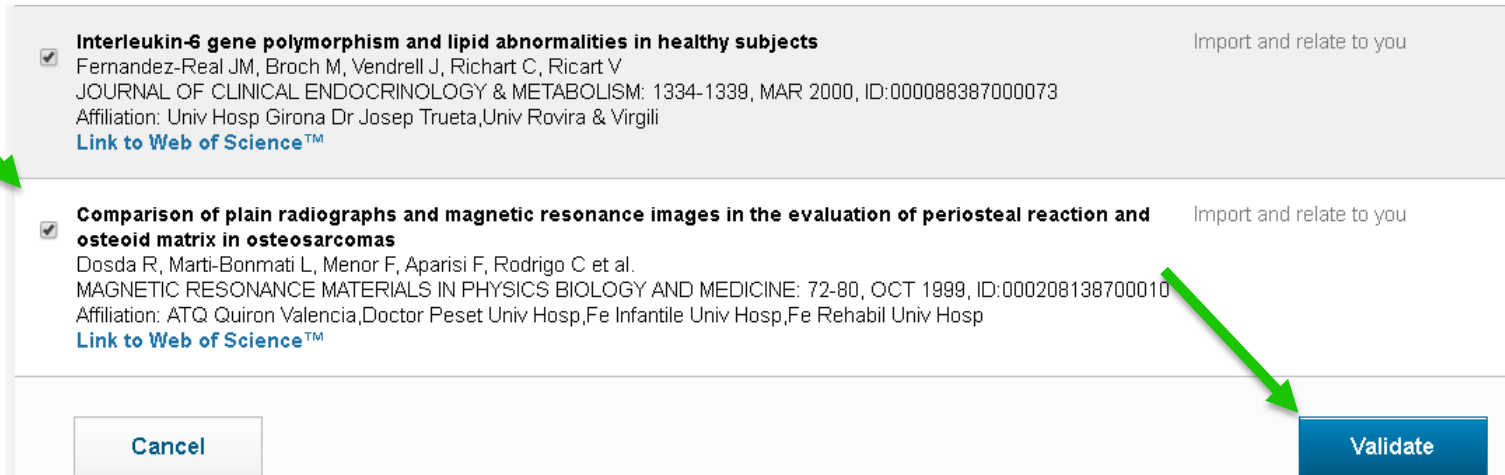
Web of Science™ (7)

<input type="checkbox"/> Publication data	Action
<input type="checkbox"/> <b>Benign and Malignant Nodular Thyroid Disease in Acromegaly. Is a Routine Thyroid Ultrasound Evaluation Advisable?</b> Reverter JL, Fajardo C, Resmini E, Salinas I, Mora M et al. PLOS ONE, AUG 15 2014, ID:000340879300014 Affiliation: Univ Autonoma Barcelona,Hosp Univ la Ribera,Univ Autonoma Barcelona,Hosp Clin Barcelona ... <a href="#">Link to Web of Science™</a>	Import and relate to you
<input type="checkbox"/> <b>THROMBOPHILIC MUTATIONS IN OCULAR BEHCET'S DISEASE WITH POSTERIOR SEGMENT INVOLVEMENT</b> Vaya Montana AV, Suescun Gimenez MS, Espana E, Espana Furio FE, Ricart Vaya JMR THROMBOSIS RESEARCH: S49-S49, MAY 2014, ID:000338292900132 Affiliation: La Fe Univ,Polytech Hosp La Fe <a href="#">Link to Web of Science™</a>	Import and relate to you
<input type="checkbox"/> <b>'Share your experience'. Digital storytelling in English for tourism</b> Alcantud-Diaz M, Ricart Vaya AR, Gregori-Signes C IBERICA: 185-204, SPR 2014, ID:000333227500010 Affiliation: Univ Valencia,Univ Valencia <a href="#">Link to Web of Science™</a>	Import and relate to you



# Publication Import - External Sources

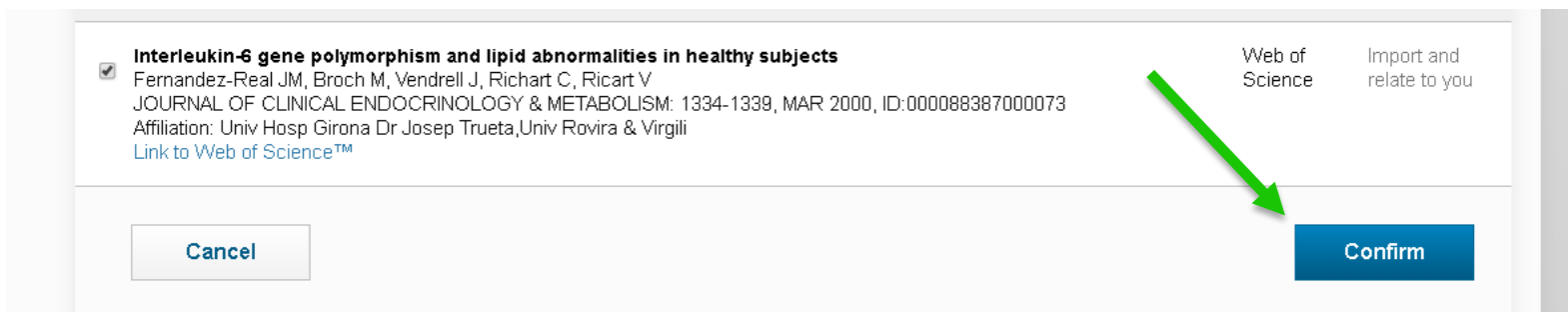
Select which records you would like to import, then click “Validate.”



The screenshot shows a list of two publications. The first record is selected with a checkmark and has a green arrow pointing to it. The second record is also selected with a checkmark and has a green arrow pointing to the 'Validate' button. The interface includes a 'Cancel' button on the left and a 'Validate' button on the right.

Publication Title	Source	Action
<input checked="" type="checkbox"/> <b>Interleukin-6 gene polymorphism and lipid abnormalities in healthy subjects</b> Fernandez-Real JM, Broch M, Vendrell J, Richart C, Ricart V JOURNAL OF CLINICAL ENDOCRINOLOGY & METABOLISM: 1334-1339, MAR 2000, ID:000088387000073 Affiliation: Univ Hosp Girona Dr Josep Trueta,Univ Rovira & Virgili <a href="#">Link to Web of Science™</a>	Web of Science	Import and relate to you
<input checked="" type="checkbox"/> <b>Comparison of plain radiographs and magnetic resonance images in the evaluation of periosteal reaction and osteoid matrix in osteosarcomas</b> Dosda R, Marti-Bonmati L, Menor F, Aparisi F, Rodrigo C et al. MAGNETIC RESONANCE MATERIALS IN PHYSICS BIOLOGY AND MEDICINE: 72-80, OCT 1999, ID:000208138700010 Affiliation: ATQ Quiron Valencia,Doctor Peset Univ Hosp,Fe Infantile Univ Hosp,Fe Rehabil Univ Hosp <a href="#">Link to Web of Science™</a>	Web of Science	Import and relate to you

You'll then be asked to “Confirm” that you want to import them.

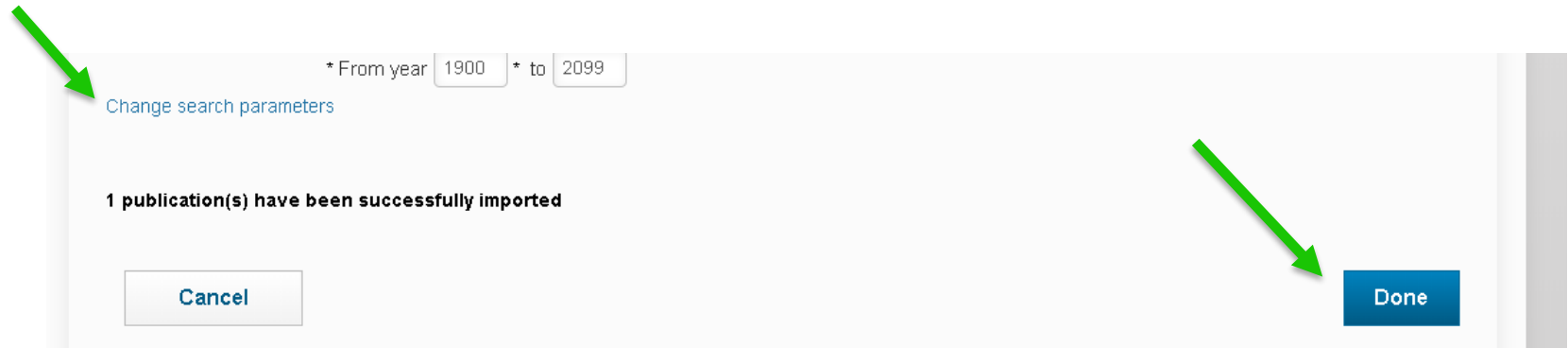


The screenshot shows the first record from the previous screen. The 'Validate' button has been replaced by a 'Confirm' button, and the text 'Web of Science' and 'Import and relate to you' is now positioned above the 'Confirm' button. A green arrow points to the 'Confirm' button. The 'Cancel' button remains on the left.

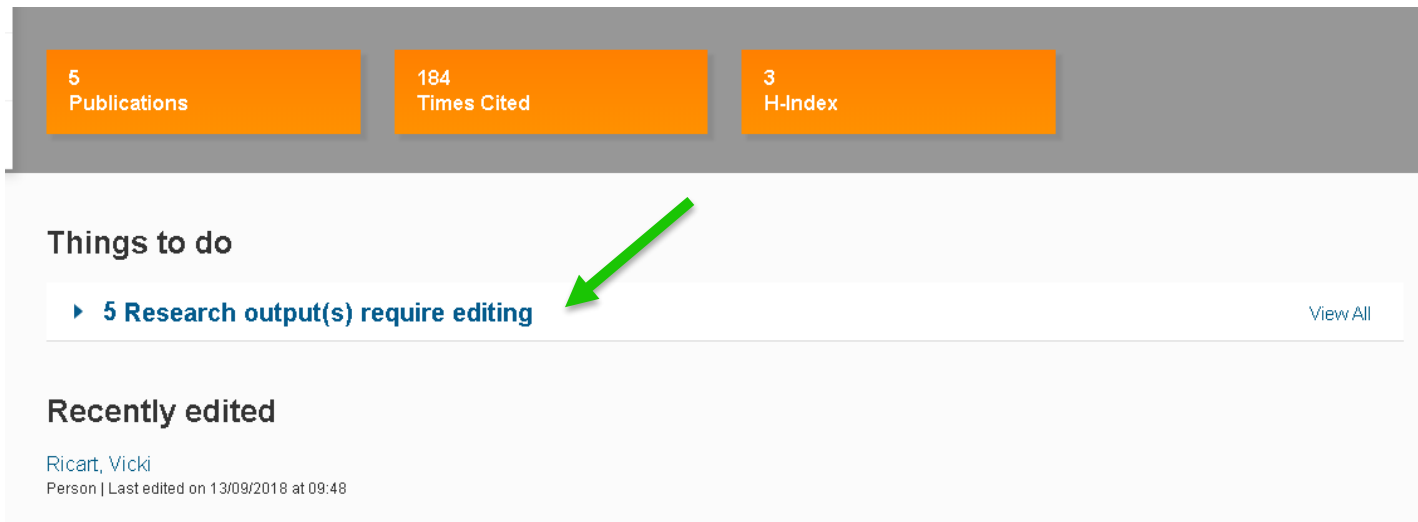
Publication Title	Source	Action
<input checked="" type="checkbox"/> <b>Interleukin-6 gene polymorphism and lipid abnormalities in healthy subjects</b> Fernandez-Real JM, Broch M, Vendrell J, Richart C, Ricart V JOURNAL OF CLINICAL ENDOCRINOLOGY & METABOLISM: 1334-1339, MAR 2000, ID:000088387000073 Affiliation: Univ Hosp Girona Dr Josep Trueta,Univ Rovira & Virgili <a href="#">Link to Web of Science™</a>	Web of Science	Import and relate to you

# Publication Import - External Sources

You can then change your parameters and continue to search or click “Done”



After clicking “Done” you will be returned to your dashboard. Research Outputs that need editing (including those you have imported) show up in your list of things to do. These records will need to be edited before sending for review and validation.



# Publication Import - From Files

Select “Import from.” If the you select the “from file” menu item selected you will be presented with the screen below.

**Add new Research Output**

Do you want to import existing data?  Create Manually  Import from File

**Select author's affiliation**  
Ricart, Vicki - South African Technology Network (Active)

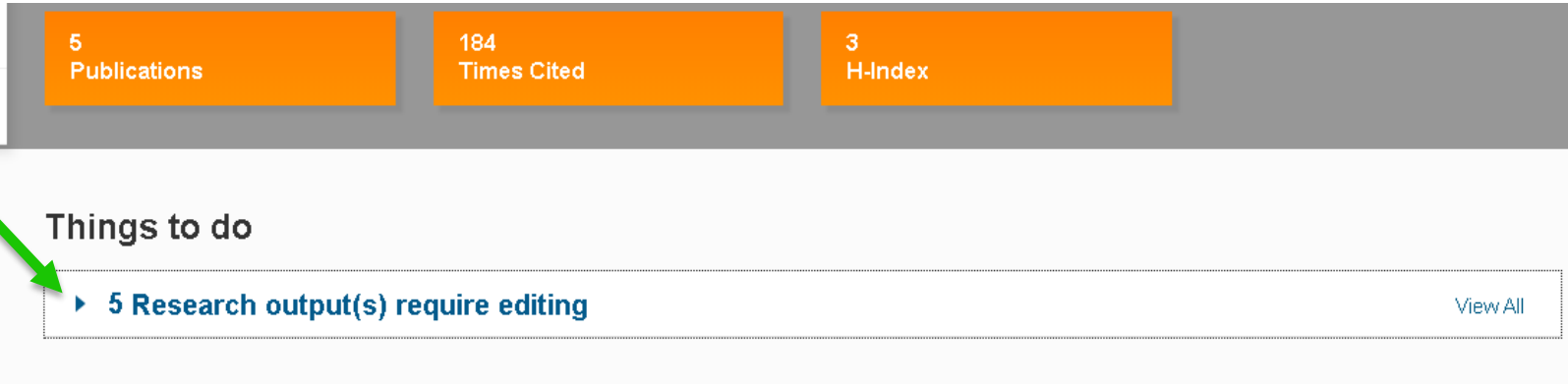
**Select file**  
Please select your file of publications. Following formats are supported. BibTex, EndNote (XML).

[Cancel](#)

You can then upload a file and it will import records similarly as it did from external sources.

# Publication Import - Editing Records

Records that need editing (because you saved them in draft to return to them later or because they were imported and need additional information) will appear on your dashboard under “Things to do.”



5 Publications      184 Times Cited      3 H-Index

**Things to do**

▶ **5 Research output(s) require editing** View All

A green arrow points to the '5 Research output(s) require editing' message.

Click on the message to see the list and select a record to edit.

## Things to do

### ▼ 5 Research output(s) require editing

[View All](#)

THROMBOPHILIC MUTATIONS IN OCULAR BEHCET'S DISEASE WITH POSTERIOR SEGMENT INVOLVEMENT; Montana AV, Gimenez MS, Espana E, et al.; 2014; Other  
Last edited by Vicki Ricart on 13/09/2018 at 10:06




Interleukin-6 gene polymorphism and lipid abnormalities in healthy subjects; Fernandez-Real JM, Broch M, Vendrell J, et al.; 2000; Journal article  
Last edited by Vicki Ricart on 13/09/2018 at 10:04

Dural enhancement with primary calvarial lesions; Arana E, Marti-Bonmati L, Ricart V, et al.; 2004; Journal article

# Publication Import - Editing Records

Check imported fields for accuracy and complete other fields as required in the Bibliographic Details, Authors and DHET Reporting tabs.

Interleukin-6 gene polymorphism and lipid abnormalities in healthy subjects;  
Fernandez-Real JM, Broch M, Vendrell J, et al.; 2000; Journal article

 Not publicly visible  Not internally visible  Record requires editing ... Admin Info ▾

**Bibliographic Details \*** **Authors \*** **Research Office**

**Publication details \***

Output type \*

Journal article ▾

Title \*

Interleukin-6 gene polymorphism and lipid abnormalities in healthy subjects

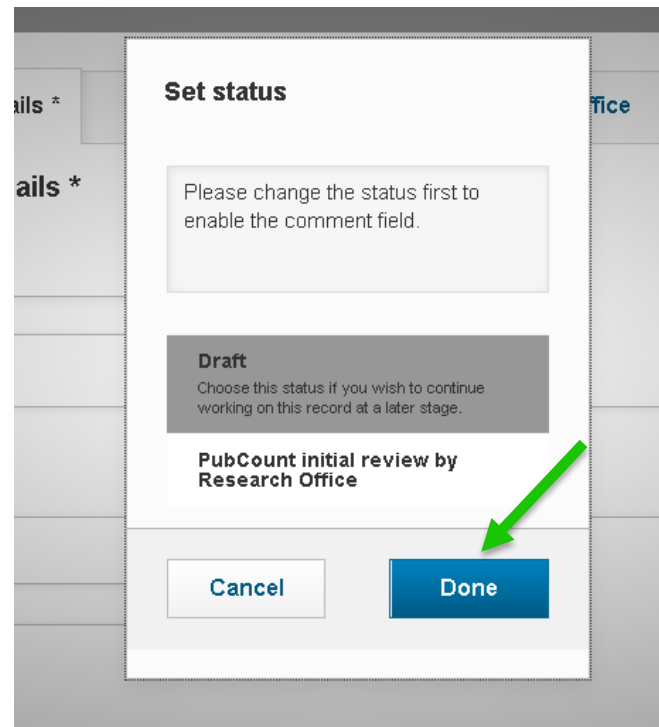
Subtitle

# Publication Import - Editing Records

If you want to save this record and continue working, click “Save.” If you want to save and leave the record, click “Save and Close.”



After clicking “Save and Close” choose whether you want to keep it in the current status and come back and work on it later, or send it forward for review (**Departmental Review**), then click “Done.”



# Publication Creation

# Publication Creation - Manual

Select the “Create Manually” option and then select a type of record from the list.

## Add new Research Output

Do you want to import existing data?

Create Manually  Import from

Select the appropriate research output type


Research Output	Information about the selected research output
▶ Journal related publication types	
▶ Conference related publication types	
▶ Book related publication types	
▶ Artistic/Performance	
▶ Other Outputs	



# Publication Creation - Manual

Click on one of the categories to show the types of research outputs.

Select the appropriate research output type

Research Output	Information about the selected research output
 ▼ Journal related publication types	Periodical publications aimed at fostering intellectual debate and inquiry. Special journal issues are produced by editors with an established record of scholarship in the field and able to provide the direction of the theme. Journal issues bear a unique number of reference for publication.
Journal article	
▶ Conference related publication types	
▶ Book related publication types	
▶ Artistic/Performance	
▶ Other Outputs	

Hover over the menu item for a description of that category or record type.

# Publication Creation - Manual

After selecting a type you will be presented with a blank form. Complete the fields on the “Bibliographic Details”, “Authors” and “DHET Reporting” tabs.

## New Research Output

Not publicly visible  Not internally visible  Draft

**Bibliographic Details \*** **Authors \*** **Research Office**

### Publication details \*

Output type \*

Journal article

Title \*

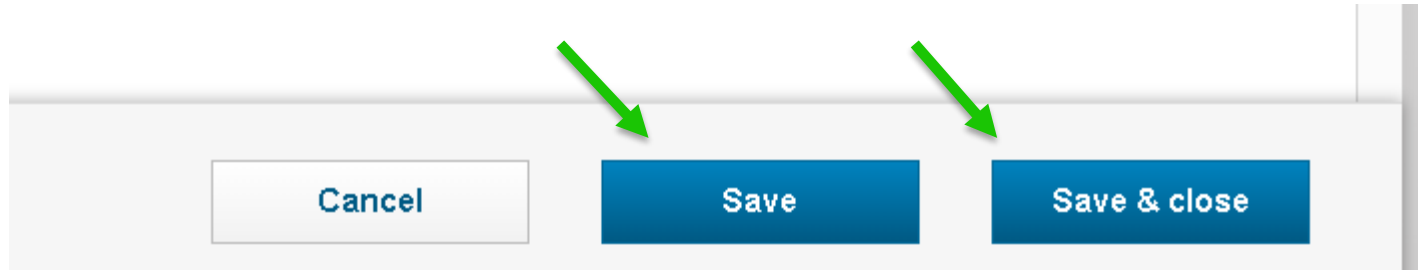
  

Subtitle

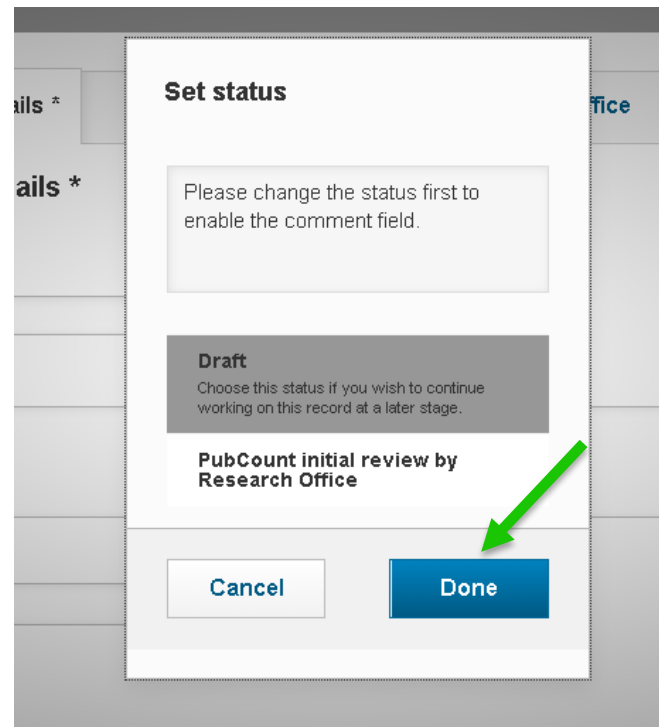
### Journal Details

# Publication Creation - Manual

If you want to save this record and continue working, click “Save.” If you want to save and leave the record, click “Save and Close.”



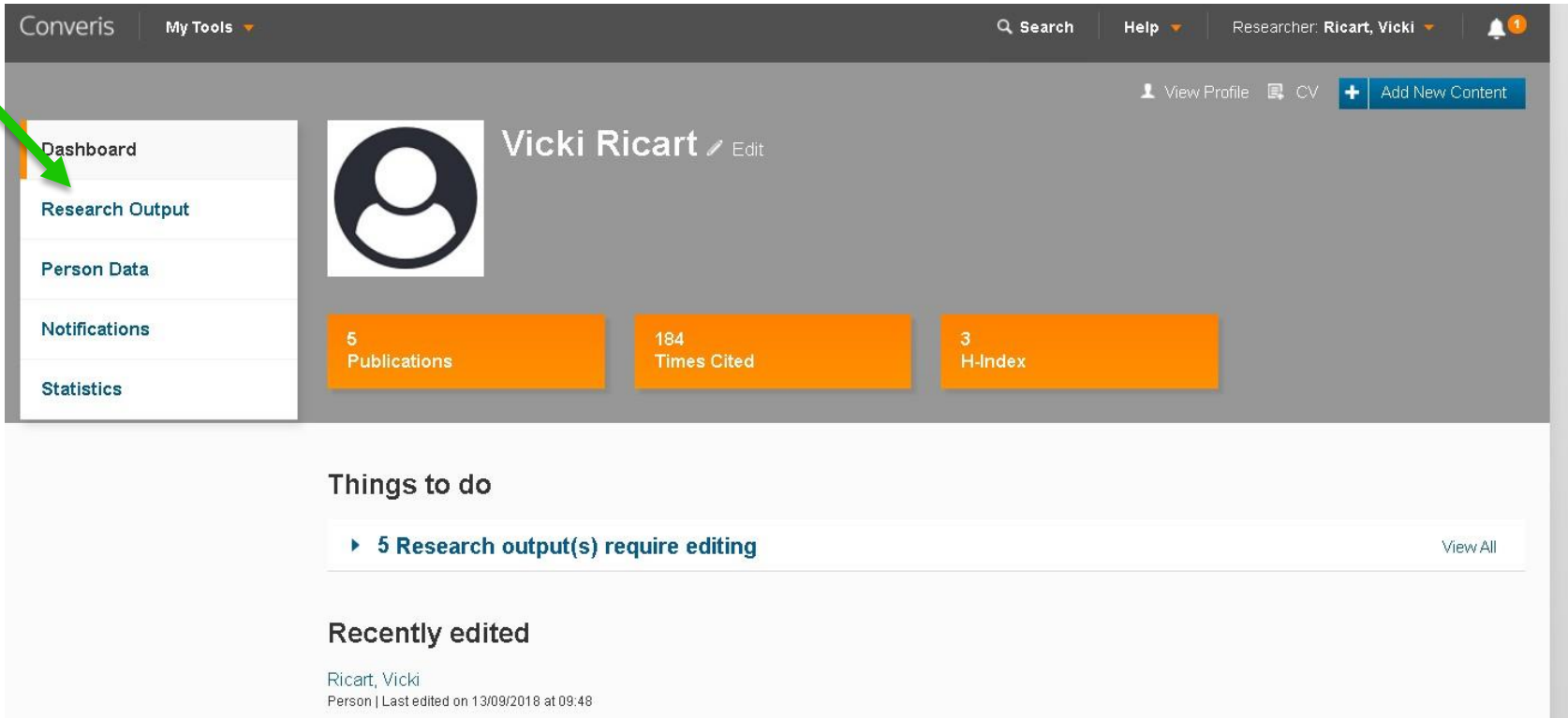
After clicking “Save and Close” choose whether you want to keep it in the current status and come back and work on it later, or send it forward for review (**Departmental Review**), then click “Done.”



# Viewing and Filtering Your Records

# Viewing Your Records

To view your research outputs, select the Research Output menu item on the left side of your dashboard.



Converis My Tools Search Help Researcher: Ricart, Vicki

View Profile CV Add New Content

Dashboard  
Research Output  
Person Data  
Notifications  
Statistics

**Vicki Ricart** Edit

5 Publications 184 Times Cited 3 H-Index

**Things to do**

▶ 5 Research output(s) require editing View All


**Recently edited**


Ricart, Vicki  
Person | Last edited on 13/09/2018 at 09:48


# Viewing Your Records


You will then be presented with a list of your records and you can use filters including status, type, and more.


**Research Output (5)**


  
Filter

  
Export

  
Report

  
Status

  
Visibility

  
Deduplicate

Select / Deselect all

Updated on descending
▼

↻
10 | 50 | 100
⏪ 1 of 1 ⏩

<input type="checkbox"/>	▶	<p><b>THROMBOPHILIC MUTATIONS IN OCULAR BEHCET'S DISEASE WITH POSTERIOR SEGMENT INVOLVEMENT</b></p> <p>Montana AV, Gimenez MS, Espana E, et al. (2014)</p> <p>Other</p> <p><a href="#">Edit</a></p>	<div style="display: flex; flex-direction: column; gap: 5px;"> <div style="display: flex; align-items: center;"><span style="font-size: 0.8em;">🌐</span> Not publicly visible</div> <div style="display: flex; align-items: center;"><span style="font-size: 0.8em;">👁️</span> Not internally visible</div> <div style="display: flex; align-items: center;"><span style="font-size: 0.8em;">📄</span> Record requires editing</div> </div>
<input type="checkbox"/>	▶	<p><b>Interleukin-6 gene polymorphism and lipid abnormalities in healthy subjects</b></p> <p>Fernandez-Real JM, Broch M, Vendrell J, et al. (2000)</p> <p>Journal of Clinical Endocrinology and Metabolism</p> <p>Volume number: 85, Issue number: 3 (Pages: 1334-1339)</p> <p>Journal article</p>	<div style="display: flex; flex-direction: column; gap: 5px;"> <div style="display: flex; align-items: center;"><span style="font-size: 0.8em;">🌐</span> Not publicly visible</div> <div style="display: flex; align-items: center;"><span style="font-size: 0.8em;">👁️</span> Not internally visible</div> <div style="display: flex; align-items: center;"><span style="font-size: 0.8em;">📄</span> Record requires editing</div> </div>

# Viewing Your Records

Click on the filter icon and select criteria to filter.

The screenshot displays the Clarivate Analytics interface with several key elements:

- Filtering Bar:** Contains icons for Filter, Export, Report, Status, Visibility, and Deduplicate. A green arrow points to the Filter icon.
- Filter Configuration:** A section titled "Switch to query mode" with dropdown menus for "Research Output", "Output type", "equals", and "Journal article". A green arrow points to the "Output type" dropdown, and another points to the "Journal article" dropdown.
- Action Buttons:** Includes "Close", "Reset", "Save filter", and "Apply". A green arrow points to the "Apply" button.
- Record List:** Shows a record titled "THROMBOPHILIC MUTATIONS IN OCULAR BEHCET'S DISEASE WITH POSTERIOR SEGMENT INVOLVEMENT" by Montana AV, Gimenez MS, Espana E, et al. (2014). It includes an "Edit" link and status indicators: "Not publicly visible", "Not internally visible", and "Record requires editing".