

Release 1.0

eResearch Centre, James Cook University

Jul 10, 2023

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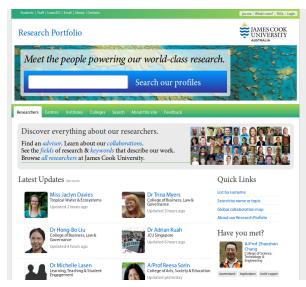




This documentation covers all aspects of the Research Portfolio (https://jcu.me), including:

Introduction to the Research Portfolio

The Research Portfolio is the flagship web application which promotes and facilitates research activities within James Cook University.



Each active researcher in the University has a profile within the Research Portfolio, displayed alongside tools for exploring the University's research efforts.

Each researcher's profile highlights many types of information, ranging from publications to grants, supervision, collaboration and everything in-between. Researchers and nominated college or divisional staff have access to live-update much of this information; there is no limit to how frequently information can be updated.

This documentation covers various aspects of the Research Portfolio, including features, profile creation and editing, and a technical break-down of automatic data sources. In addition, this documentation aims to serve as a reference for Research Portfolio officers when they are updating profile pages in their division or college.

1.1 Got feedback?

If you've got feedback about the Research Portfolio or this documentation, please get in touch by contacting the IT Helpdesk (http://www.jcu.edu.au/helpdesk). We'll get back to you as soon as possible.

Even if you're not a JCU staff member or researcher, you can still send an email to the IT Helpdesk (http://www.jcu.edu.au/helpdesk) to send your feedback or suggestions.

Features

This is an explanation of the different features available on the Research Portfolio. If you don't feel like reading, just go exploring at https://jcu.me!

2.1 What's new?

See the Features (https://jcu.me/features) page for the latest updates and changes.

2.2 Short web address (URL)

It's easy to remember: jcu.me (https://jcu.me)!

Anything you type after jcu.me automatically points visitors at https://research.jcu.edu.au/ portfolio, being the full site URL. So, the following are possible:

- jcu.me/collaboration (https://jcu.me/collaboration) links to the worldwide collaboration map
- jcu.me/search/turtle (https://jcu.me/search/turtle) links to the search for turtles

Search our profiles

• ... and any other page works in the same way!

This means that individual profiles get a jcu.me (https://jcu.me) address. For example, Professor Ian Atkinson can be found at https://jcu.me/ian.atkinson. It's the first part of the person's email address. This makes for a simple, memorable link for a business card or email signature.

2.3 Full-text search

Research Portfolio

Meet the people powering our world-class research.

John Smith

This feature executes an intelligent search on research disciplines, socio-economic objectives, keywords, campus, names, biography or interests, including synonyms and partial word searches.

Use the search box on the home page to search and you can also use the Search link to jump to a dedicated search page from anywhere.

2.4 Find an advisor

Just use the link on the home page to start a search for an advisor for a research project. This predefined search lists only those staff on the research advisor register. Adding words to the search will only show results for registered advisors.

2.5 Interactive data

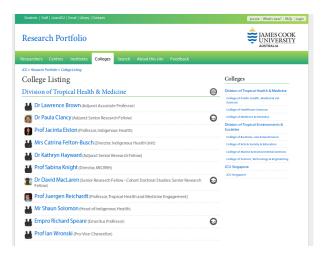


The Research Portfolio features interactive collaboration maps which show links across the world (built from publication and grant listings). Maps can show collaborations for a specific Division or College, or a Research Centre or Institute.



The word clouds linked from the jcu.me (https://jcu.me) homepage show different aspects of data, including fields of expertise for the University and research keywords that highlight the areas of excellence for the University's research.

2.6 Centres, Institutes and Colleges



There are links at the top of every page that access listings of the James Cook University Centres, Institutions, Collages and their respective members. These pages are automatically updated from the relevant data stores.

2.7 Profile pages

2.7.1 Dynamic data

We automatically pull and aggregate information for many different data sources across the University for simple display in one place.

Read more about the Updating institutional information (page 16).

2.7.2 Researcher-contributed details

Researchers can also self-contribute many different pieces of information about themselves to enhance their Research Portfolio page.

For details on how to update information, see Changing self-contributed information (page 12).

2.7.3 Similar to me

Similar to me

A/Prof Wayne Read

College of Science, Technology & Engineering

Dr Bithin Datta College of Science, Technology & Engineering

A/Prof Michael Oelgemoeller College of Science, Technology & Engineering

Dr Hossein Ghodosi College of Business, Law & Governance

Dr Trina Myers College of Business, Law & Governance

Each profile will show a *Similar to me* panel which helps visitors build connections between researchers. These associations are built using all information associated with a profile and dynamically calculated on similar research interests, keywords, research disciplines, socio-economic objectives, and co-authored papers.

2.7.4 Altmetric badges

Altmetric badges are the colourful *donut* indicators against publications on profile pages. They provide helpful indications as to the social impact that research publications have, and automatically update to include counts of news articles, blogs, and various social network posts that feature the publication.



If a publication is missing an Altmetric badge, no count has been detected. Mentioning publications on Twitter, Facebook or other social media boosts exposure. Ensure that any news articles and blog posts include either a link to the publication, or mention its DOI (Digital Object Identifier).

Altmetric badges can be disabled on a per-profile basis; see Changing your profile settings and data (page 13).

Getting a profile

3.1 Who is considered an active researcher?

Profiles are automatically created for *active researchers* at the University. An active researcher is defined as someone who is the following:

- A current member of staff;
- Is not a casual staff member;
- Holds a position that is classified as academic (AC) or research (RS), except general research staff (award type of RESG); and
- Has at least one visible (non-thesis) publication in the JCU publication repository, ResearchOnline@JCU (https://researchonline.jcu.edu.au).
 - Note: A thesis is an unpublished work and will not be included in the set of publications shown.

If you need to deposit publications into ResearchOnline@JCU (https://researchonline.jcu.edu.au), you, or someone on your behalf, can do so online.

3.1.1 Adjuncts

For researchers that hold adjunct positions, a profile is created for those that:

- Have at least one visible (non-thesis) publication in the JCU publication repository, ResearchOnline@JCU (https://researchonline.jcu.edu.au); and
- Are a principal investigator of a current grant, or currently supervising a HDR (Higher Degree Research) student, or have at least 5 ERA-eligible publications in the last 5 years where at least one of these outputs is co-authored with a current (non-adjunct) JCU researcher.

This profile is *initially hidden*, so in order to be seen publicly you will need to *edit your profile* (page 10).

3.1.2 Special situtations

Profiles are also created for research managers (such as College Deans, Pro-Vice Chancellors and Academic Deans of Research) and Emeritus Professors, provided one visible publication is stored in ResearchOnline@JCU (https://researchonline.jcu.edu.au).

3.2 Can't see your profile?

If your profile doesn't appear to be present, check through each of the points above. For a profile to appear, all information in the respective central database or system must be correct and up-to-date. Once data has been updated in the relevant central system, updates occur *perodically* (page 20).

If, after checking all your data, you think you should have a profile but it's not there, please email research.portfolio@jcu.edu.au.

3.3 Requesting a Profile

In the case where you don't meet the criteria for a profile, you can apply for an exception to be made. You will need a letter of support from your College Dean or Director and articulate the benefit to your College/Directorate and the University that would come from you having a public profile. Email your request to the Dean of Research and copy in research.information@jcu.edu.au. If the Dean of Research grants the exception, the Research Information team will ensure that your portfolio page is created on the next data update.

Editing your profile

Let's take a look through how to get started editing a profile.

In general, there are two key types of information on the Research Portfolio:

• Self-contributed information: particulars that you can update online any time via your profile page, such as biography, interests and experience. Changes take effect immediately and are visible instantly.

See Changing self-contributed information (page 12) for more details on how to edit this data.

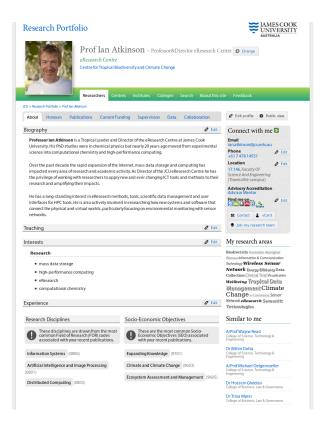
• **Institutional information**: data that other departments are responsible for managing, such as publications, research grants, and personal information. Updates will be automatically reflected on Portfolio pages on the weekend following a change.

You'll need to contact the *relevant department* (page 16) to update this data.

4.1 Who can edit profiles?

Individuals can edit their own profiles online, and anyone who holds the Research Portfolio Officer organisational role may edit profiles within their College or Discipline. To determine who may edit profiles in your department, see role emails (https://secure.jcu.edu.au/app/roleemails/index.cfm?showmember=ResearchPortfolioOfficer).

4.2 Editor's view



If you're logged in and viewing your own profile or a profile that you can otherwise edit, you'll notice the page will show all potential data tabs and a number of *Edit* buttons on the page. This shows a complete view of what can be included and how to update details or who to contact.

4.3 Viewing your updated profile

Note: If your profile is hidden, it will not be listed anywhere on the site. Anyone without edit access will not be able to see or access your profile.

If you've just updated settings or information on your profile, you'll want to see how it looks to the world.



- 1. If still editing your profile, click the Cancel editing button on the Edit profile page.
- 2. Click the Public view button to toggle how your profile appears. Any empty tabs or sections will disappear.

3. Click the Public view button again to toggle the page back again.

4.4 Changing self-contributed information

All these tasks will require you to first login and access your profile page. If you are a Research Portfolio Officer and editing others' pages, you'll need login as yourself, but you'll be accessing the researchers' pages.

4.4.1 Adding or changing photos

Note: Try to select an image with eye contact that helps identify you! The University style guide sets out that our imagery is full colour, bright and high in contrast with saturated colours, so select an image like this.



JCU > Research Portfolio > Prof Ian Atkinson

To update your existing photo or change the initial generic photo:

- 1. Login and access your profile page.
- 2. Click the default photo on the profile page. You'll notice an Edit Photo label appear when doing this.
- 3. Use the pop-up window that appears to manage your photo.
- 4. Choose a photo to upload, and click the Upload button.
- 5. Click and drag on the photo that is displayed to crop to suitable size.



- 6. When done, click the Crop button at the bottom of the page. If you make a mistake, you can click Revert to original to go back to the original image.
- 7. Close the pop-up window to see the results.

4.4.2 Changing your profile settings and data

Note: Keep in mind that any changes to a profile will take time to be reflected in search engines. This may be several days or longer.

Aside from data sourced automatically, a profile page includes many types of information that you can update live online. To do so:

- 1. Login and access your profile page.
- 2. Click the Edit profile button.
- 3. Step through each section of the form and add details or change settings.
- 4. Click Save changes to update your profile. Changes will be applied immediately.

Types of information you can self-contribute includes:

4.4.3 General settings

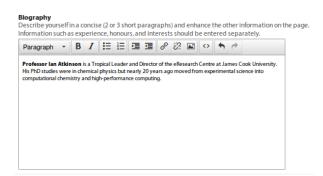
These are general configuration options that control how your profile is displayed on the site.

Hide my profile Temporarily hide your profile from being public.

Hide my title Hide your salutation/prefix from profile pages and listings.

Hide Altmetric badges Hide the colourful Altmetric (https://altmetric.com) badges from publications.

4.4.4 Biography



Your self-authored description of yourself, your research and other relevant details. The editor allows you to format text in multiple ways, insert hyperlinks and change the paragraph styles easily. The editor displays the results before you save the changes.

You can copy and paste from another document or your homepage, but please keep the biography concise - two or three short paragraphs - so it doesn't overshadow the other information on the page. Ensure you break out your *experience* (page 14), *honours* (page 15) and *interests* (page 15) into the appropriate sections as this will improve your search rankings.

You are able to add links, bulleted or numbered lists and images into your biography but these should be used carefully and sparingly. Remember that this is the world's view to you and your research.

4.4.5 Experience

	rt these for	you.		
Start Year*	End Year	Position*	Institution*	Location
2010	2015	Senior Lecturer	Charles Darwin Univ	Northern Territory, Austral
K Start Year*	End Year	Position*	Institution*	Location
2007	2010	Coordinator	Science USA	Los Angeles, USA
K Start Year*	End Year	Position*	Institution*	Location
2006	2007	Senior Technical Sup	Department of Energy	Australia

Describe positions and experience relevant to your work by adding them, one at a time. For a current position, leave the End Year field empty.

Note: Experience is shown in reverse chronological order when displayed on a profile page.

4.4.6 External identifiers

	External Service* Select the type of identifier you are providing	
	Twitter (Username)	
	Twitter (Username) Identifier For example: https://twitter.com/ <i>davidjb_</i>	
	davidik.	Test
ţ	gavidib_ External Service* Select the type of identifier you are providing Blog (URL)	Test
ţ	External Service [®] Select the type of identifier you are providing	Test
1	External Service* Select the type of identifier you are providing Blog (URL)	Test

These are links to your website, web pages or profiles on systems external to the University that help to bridge your digital identity. These can be publisher or professional identities such as ORCID, Scopus or Google Scholar and can also be social media sites such as LinkedIn and Twitter. When you enter and save an identifier, the corresponding icon will appear on the *Connect with me* panel on your profile.

When adding a new identifier, the grey highlighted section of the example (sometimes the example is the entire entry) shows the part of the URL or identifier required. You can use the Test button to confirm your profile loads in the pop-up window that appears.

If you're editing your profile for the first time, you'll likely find some of these identifiers have been added automatically.

Note: Identifiers are shown in the order you list them when displayed on a profile page.

4.4.7 Honours

Honours Enter honours, such as fellowships, memberships or awards, that you have been awarded. We'll automatically group and order these for you. X Type* Start Year End Year Title or Description* Award 2014 2014 Oxford Scholarship Online Start Year End Year Title or Description* X Type* Fellowship 1 2013 Fellow of the Chartered Management Institute, UK Start Year End Year Title or Description* X Type* Fellowship 2013 2013 Fellow of the College of Preceptors, UK Start Year End Year Title or Description* X Type* Membership 1 2010 2012 International Theme Committee, Committee Member, Academy of Management, US. Start Year End Year Title or Description* × Type* Membership (*) 2009 (2012) Fellow Scholar, Advanced Institute of Management Research, UK Add honour

Highlight fellowships, memberships and awards that you've received or are associated with by adding *Honours* to your profile.

Note: Honours are grouped by type, and shown in reverse chronological order when displayed on a profile page.

4.4.8 Interests

Interests Describe topics that you a automatically group thes	are interested in within a research, teaching or professional capacity. We'll e for you.
🗙 🔶 Туре*	Description*
Professional 🌲	Innovation
🗙 🔶 Type*	Description*
Research 🗘	Remote Sensing
🗙 🕺 Type*	Description*
Research 🜲	Coral Reefs
🗙 🖞 Type*	Description*
Teaching 2	Active and collaborative learning
Add interest	

Describe topics you are interested in within a research, teaching or professional capacity. All information is searchable across the site, and can improve your discoverability.

Note: Interests are grouped by type, and shown in the order you list them when displayed on a profile page.

4.4.9 Locations

Locations

Tell the world where you can found on one of the University's campuses. Enter up to 3 locations.

Room Number*
Enter a room number, like 17.143, and select your room from the menu that appears.

 17.144

Add location

Add rooms or lab locations to your profile. Adding a location automatically links to interactive maps to display your building.

Note: Room locations are only available for Townsville and Cairns campuses at present.

An auto-completion list will be displayed when entering a building number. Use this to select your room from the menu. You can add a second room, such as if you have an office on a different campus or lab in a different area.

Note: Locations are shown in the order you list them when displayed on a profile page.

4.5 Updating institutional information

Beyond the self-contributed information mentioned *above* (page 12), the Research Portfolio uses information from the following James Cook University systems:

- Human Resources Information Management System (HRIMS) (page 16)
- JCU Identity Management (ICT) (page 17)
- Telephone Switchboard (Operators Database) (page 17)
- Research Information Management System (RIMS; Research Services) (page 17)
- ResearchOnline@JCU (JCU Library) (page 18)
- Student Management System, StudentOne (GRS) (page 19)
- Research Data Catalogue (ReDBox; Information Services) (page 19)
- Teaching Roles Database (TRDB) (page 19)

As the Research Portfolio is acts as a display of information from these other systems, the original department managing the data is responsible should it need correction. Any changes will automatically flow through to the Research Portfolio; see *recent changes* (page 20).

Note: Before contacting the administrator of any data source please check the criteria and notes listed to ensure that the data in question is indeed incorrect and not just excluded from display.

4.5.1 Human Resources Information Management System (HRIMS)

- Title (except for the title of Distinguished Professor, which are managed in *Research Information Management System (RIMS; Research Services)* (page 17))
- Name

- Position title
- Organisational units
- Campus (used only if the Telephone Switchboard hasn't recorded your campus)

Note: The basic information about each researcher displayed in the titles, headings and *Connect with me* panel.

For changes, contact Human Resources by submitting a request through the HR Service Catalog (https://jcueduau.service-now.com/lp/?id=sc_home). From this landing page, click onto *HR Services* and follow the guide to submit the type of request that matches your change. Most requests will either be *Employee Information Changes* or *General Enquiries*.

For corrections or changes to the above-listed information, verification will be required, usually with supporting documentation. For example, a copy of your qualifications would be required to change your title or an official document required to change your name. Your email address can be changed after a change of name is firstly confirmed by Human Resources.

Campus information is only used from Human Resources as a fallback if the *Telephone Switchboard (Operators Database)* (page 17) has no location present. Put simply, the easiest option to update your campus is to make requests to both HR and to the Switchboard.

Updates will be automatically reflected on Portfolio pages on the weekend following a change.

4.5.2 JCU Identity Management (ICT)

· Email address

For changes, contact the IT Helpdesk (http://www.jcu.edu.au/helpdesk). Correct information must already be in the HRIMS system. For example, if you require your preferred name to be used in your email address rather than your given name, then the preferred name must already be in your Human Resources record.

Updates will be automatically reflected on Portfolio pages on the weekend following a change.

4.5.3 Telephone Switchboard (Operators Database)

- · Phone numbers
- Campus (if empty, your campus is obtained from HR)

Note: Displayed in the *Connect with me* panel, if available.

For changes, log an IT Helpdesk (http://www.jcu.edu.au/helpdesk) request asking for your staff contact list telephone number to be updated. Alternatively, you can request changes be made by calling the JCU Switchboard (http://www.jcu.edu.au/contacts/campus/JCUPRD_053790.html) directly; hold the line until you reach a Switchboard operator and then ask them to update your staff contact list telephone number.

Campus information from the Switchboard is used as the primary data source but the Research Portfolio will use data from Human Resources if no location is present here. Put simply, the easiest option to update your campus is to make requests to both HR and to the Switchboard.

Updates will be automatically reflected on Portfolio pages on the weekend following a change.

4.5.4 Research Information Management System (RIMS; Research Services)

- Title (Distinguished Professor title only)
- Preferred name (preferred form of first name)
- FOR codes

- SEO codes
- Keywords
- Collaborations (co-investigators from funding and co-authors from research outputs)
- Funding details (all current grants and those that finished in the last 3 years)
- Groups

For changes to these details, contact the IT Helpdesk (http://www.jcu.edu.au/helpdesk) and request the job be assigned to the Research Information team within Research Services. Updates will be automatically reflected on Portfolio pages on the weekend following a change.

Note: *Preferred name* is initially set as your first name from HR but remains separate such that a portfolio page can display a preferred form for your first name. For example, if your first name in HR is *James* and you prefer to be called *Jim*, contact Research Information to enact this change.

Note: RIMS combines data associated with publications and grants/contracts, for the last five years, to produce:

- Top Research Disciplines
- Top Socio-Economic Objectives (SEO)
- A set of most frequently used keywords for research activities
- List of current funding. Includes those granted but not yet started; currently active; or completed in the last year.
- Collaboration world map, by country and state for Australia, USA, and Canada. Collaborations are per institution.

Codes, keywords and collaborations are based on data entered into ResearchOnline@JCU for outputs and into the RIMS Grants database for inputs over the last 5 years. Submitting publications and grants will automatically update the codes, keywords and collaborations displayed.

4.5.5 ResearchOnline@JCU (JCU Library)

• Publications

Note: Publications are grouped by type, and the 12 most recent publications are shown. HERDC eligible outputs are favoured over others, even if they are older. As such, if you have more than 12 recent publications, it is likely some more recent publications may not be shown. A visitor to a Research Portfolio page can always load the full list of publications by following the relevant link.

To submit publications, go to ResearchOnline@JCU (https://researchonline.jcu.edu.au/). For importing your past outputs via ResearcherID and for changes to existing publications, output references, contact (http://researchonline.jcu.edu.au/contact.html) the ResearchOnline@JCU team.

The following summarises the types of publications that are considered HERDC-eligible and thus show on a Research Portfolio page:

Publication Type	Description	Category
Book	Authored - research	A1
Book Chapter	Chapter in A1 book	B1
Journal Article	Refereed article in a scholarly journal	C1
Conference Publication	Full written paper - refereed	E1

If there is a discrepancy, contact ResearchOnline@JCU (https://researchonline.jcu.edu.au/) staff to have the publication checked. If a publication type is not listed above, such as a thesis or technical document, then it won't be shown on the Research Portfolio.

Updates will be automatically reflected on Portfolio pages on the weekend following a change.

4.5.6 Student Management System, StudentOne (GRS)

• Supervision records

Note: Supervision activities marked as currently active or completed within the last five years. For completed students, the thesis title will link to their ResearchOnline@JCU publication.

For changes, contact the Graduate Research School (http://www.jcu.edu.au/grs). Updates will be automatically reflected on Portfolio pages on the weekend following a change.

4.5.7 Research Data Catalogue (ReDBox; Information Services)

• Dataset records

Note: Displays the 10 most recently entered metadata records.

For updates or changes, manage this information directly through the ReDBox (http://research.jcu.edu.au/researchdata/) application. For more information, contact the IT Helpdesk (http://www.jcu.edu.au/helpdesk) and request the job be assigned to the Research Data team within Information Services.

Updates will be automatically reflected on Portfolio pages on the weekend following a change.

4.5.8 Teaching Roles Database (TRDB)

• Teaching commitments

Note: Displays only those subjects for which the researcher has **Lecturer** responsibilities in the current year. Subjects with the word **Honours** in the title are excluded.

For changes, contact the Teaching Role Administrator for your College or Division. To identify who to contact, use the role emails (https://secure.jcu.edu.au/app/roleemails/index.cfm?showmember=TeachingRolesAdmin) page.

4.6 Updating JCU search

JCU Research Portfolio pages automatically appear as part of the JCU website's search (https://www.jcu.edu.au/search) results, displaying your name, photo and brief description when someone searches for a name or matching keywords.

The JCU search index automatically crawls all Research Portfolio pages on a nightly basis, and the JCU search webpage will periodically update its cache of the search index.

If search results for a Research Portfolio profile haven't updated after 48 hours, please log an IT Helpdesk (http://www.jcu.edu.au/helpdesk) job, mentioning that your request should be directed to JCU Marketing and include the search URL that you have been looking at, as well as the expected result.

FAQs (Frequently Asked Questions)

5.1 Why can't I see my profile?

Firstly check to ensure your profile is not hidden; note that adjunct staff are hidden by default. Try logging into the Research Portfolio and searching for your name. If you can find yourself, then see *Changing your profile settings and data* (page 13) for how to change this setting.

If this reveals no profile, then you are not currently classed as an active researcher and therefore do not have a profile at this stage. Refer to the details about active-researcher for the relevant conditions that must be met for a profile and *Can't see your profile?* (page 9) for more information.

5.2 When will my profile be created?

Your profile will be created automatically as long as you meet the criteria for an active-researcher.

5.3 How do I fix information on my profile?

See Editing your profile (page 10).

5.4 When do changes take effect?

Any recent changes will be pushed to the Research Portfolio on the weekend following their update, so new profiles are available on the coming Monday.

Refer to Editing your profile (page 10) for more information on where data is sourced.

5.5 What happens if some of my publications are not public access?

The publication page from ResearchOnline@JCU is displayed when the publication title link is clicked. This page shows that it is Repository staff only and shows the Request a copy button. Once selected, the user is directed to a form to request access to the publication.

5.6 I collaborate with a lot of institutions and people; why isn't my tab/map displayed?

You must collaborate with institutions and people from at least 3 different regions (states or countries) for the tab and map to display.

5.7 Why are no names of students listed under my Supervision section?

The University's interpretation Queensland Right to Information 2009 of the Act (http://www.legislation.qld.gov.au/LEGISLTN/CURRENT/R/RightInfoA09.pdf) and the Queensland Information Privacy Act 2009 (http://www.legislation.qld.gov.au/LEGISLTN/CURRENT/I/InfoPrivA09.pdf) is to ensure the privacy of our students. Hence, student details may only be used if their consent has been provided. Refer to the University's Information Privacy Policy (http://www.jcu.edu.au/policy/allitoz/JCUDEV_005373.html) for further clarification.

Staff details are made accessible via the public JCU website, because they are employees of the University and are expected to be accessible as points of contact for the services they provide.

Indices and tables

• Full-text search (page 4)