SUNY Research Connect (SRC) Training Materials for Researchers

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What is SUNY Research Connect?

SUNY Research Connect is a comprehensive and accessible portal that empowers discovery, collaboration, and innovation among researchers within SUNY and beyond.

The Research information management system is built on Elsevier's Pure software. It includes a public-facing community portal https://researchconnect.suny.edu that aggregates information from four individual portals:
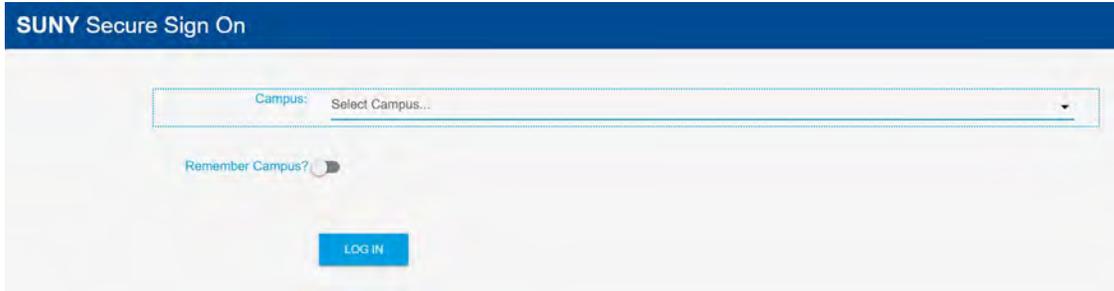
- Three campus-managed and branded portals for: University at Buffalo, Stony Brook University, and Upstate Medical University.
- One multi-campus portal including data about researchers from 23 other campuses with researchers who have recent Research Foundation managed sponsored program expenditure and full-time, tenure track faculty at each of the doctoral campuses. SUNY System Administration Office of Research, Innovation and Economic Development manages the multi-campus portal.

The Pure software also includes a back-end administrative system enabling reporting and features for researchers with profiles to login and edit their own data. SUNY researchers and their trusted designees can update their profiles by adding additional biographical information, research interests, links, or publication information not automatically indexed in Elsevier's Scopus database.

The SUNY Research Connect Community Portal cannot be edited directly. Researchers and approved editors must make desired changes to the campus-managed or multi-campus portal.
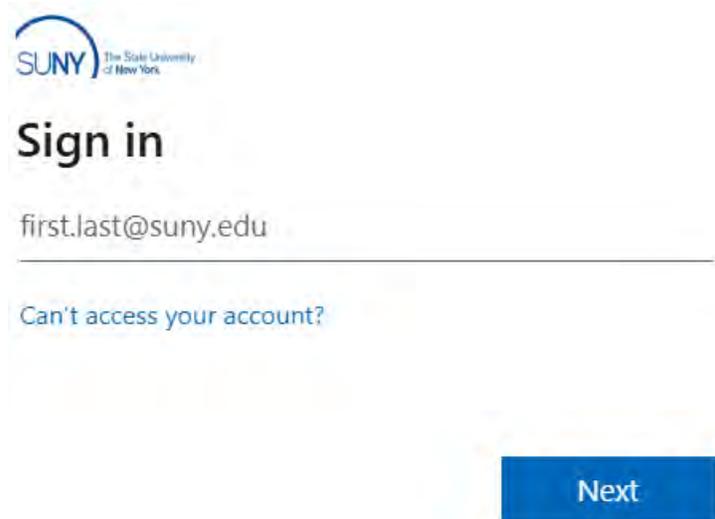
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Logging in to SUNY Research Connect (SRC)

1. Click link: https://suny.researchconnect.suny.edu/admin/
2. Sign in through SUNY Secure Sign On using your SUNY campus credentials:
   a. Select Campus

   b. Enter username

   c. Enter password

Viewing your SRC Profile

1. Upon logging in, you will see your profile picture, research outputs, Plum metrics, Projects (i.e., Sponsored Awards), and research network

Updating your SRC Profile

Update Personal Profile data

Link to Elsevier Pure Help Center - Take Advantage of the Person Profile, Name Variants in Pure

1. To update personal data (pictures, links, research interests, etc.), click "Edit profile"

2. Edits can be made wherever you see an "Add…" button or an "Edit" button except:
   a. Scopus Author IDs which are required to maintain up-to-date publications
      i. Removing this will sever the link to your publication feed
   b. Where you see a circle with two arrows (⟳) which indicates that the data is synchronized via our internal data update process
      i. If you change this, it will get overwritten during the next data sync
3. Click "Save" button at bottom of the screen
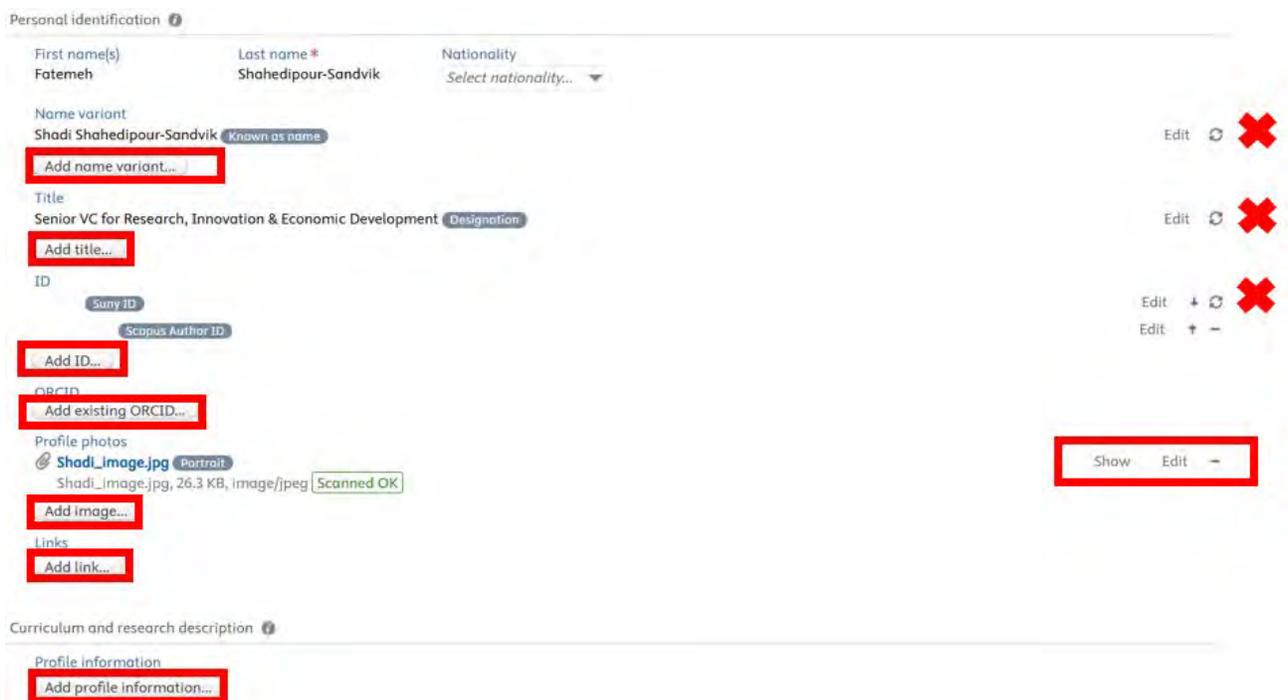
4. It may take up to 24 hours for updates to show in the SUNY Research Connect Community portal. You can click here to approximate the public portal presentation.
   a. Please do not share link with anyone as it is for internal verification purposes only.

5. To remove fingerprints from your profile **[FOR CAMPUS MANGED PORTALS ONLY [NOTE CHANGES TO FINGERPRINTS DO NOT DISPLAY IN SUNY RESEARCH CONNECT COMMUNITY PORTAL]**:
   a. Click the "Fingerprints" button on the left hand panel
    b. To remove individual fingerprints, click the red "X"
    c. To remove all fingerprints within a specific discipline, toggle the "On" button to "Off" to the right of the discipline.
    d. Click "Save" button at bottom of screen
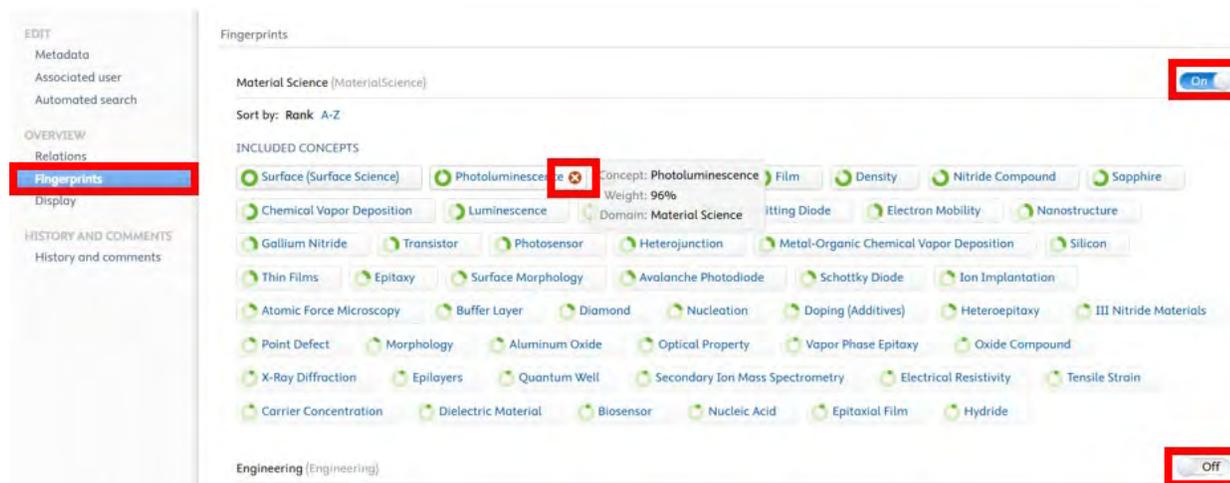
6. Changing Profile Visibility
   a. Scroll all the way to the bottom of the edit profile screen
    b. Change the 'Visibility' setting
        i. Public – The profile will be shown on the public portal
        ii. Campus – This is NOT currently configured
        iii. Backend – This will hide the profile on the public portal but still show to authenticated users with proper access
    C. Save the record
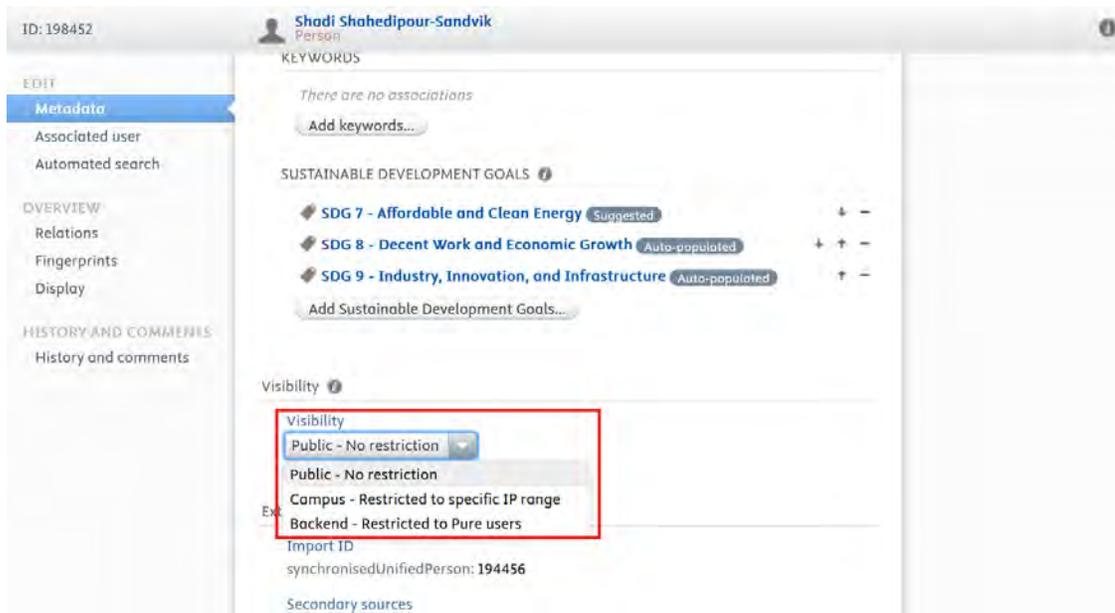
Add Research Content to Profile

1. Select the content type you'd like to edit by clicking the down arrow next to the "Personal" drop down or click hyperlinked data within the profile. You are adding information *about* or links to each content type, instead of uploading the scholarly work to each section.
   a. Note, you can only add content for types which have the "+ Add new" button
      i. Research output: you have the option of adding publications or scholarly works that are NOT automatically associated with your profile in Scopus
      ii. Activities: Examples include but are not limited to organizing conferences, publication peer-review, memberships (board, committee, council, etc.), invited talks, and consultancy(is)
      iii. Prizes: Recommend adding professional prizes only to this section
      iv. Datasets: share links to your published datasets
      v. My curricula vitae: generates a CV in one of several formats
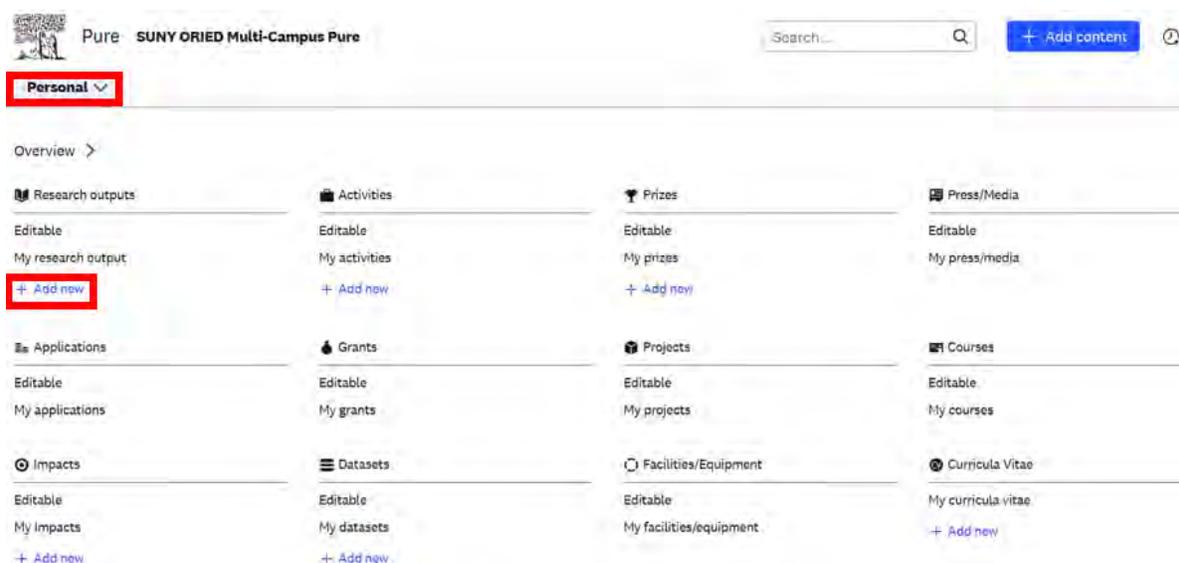

2. To manually add data, fill in all available data and click "Save" button at the bottom
   1. All data with a red asterisk next to it must be completed to save the record

3. For Research outputs specifically, you have the options of setting up integrations with specific external data sources and/or importing documents from specific file types
   a. **Integrations:** Integrations have been enabled with PubMed and ORCID. To add additional publications via available integration (i.e., PubMed, ORCID), click "Research outputs" and

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"Import from online sources". You will have the option to search for individual publications (via "Query") or to "Set up automatic search".

      i. Link to Elsevier Pure Help Center - [Setting up the ORCID ID on a Person](#)
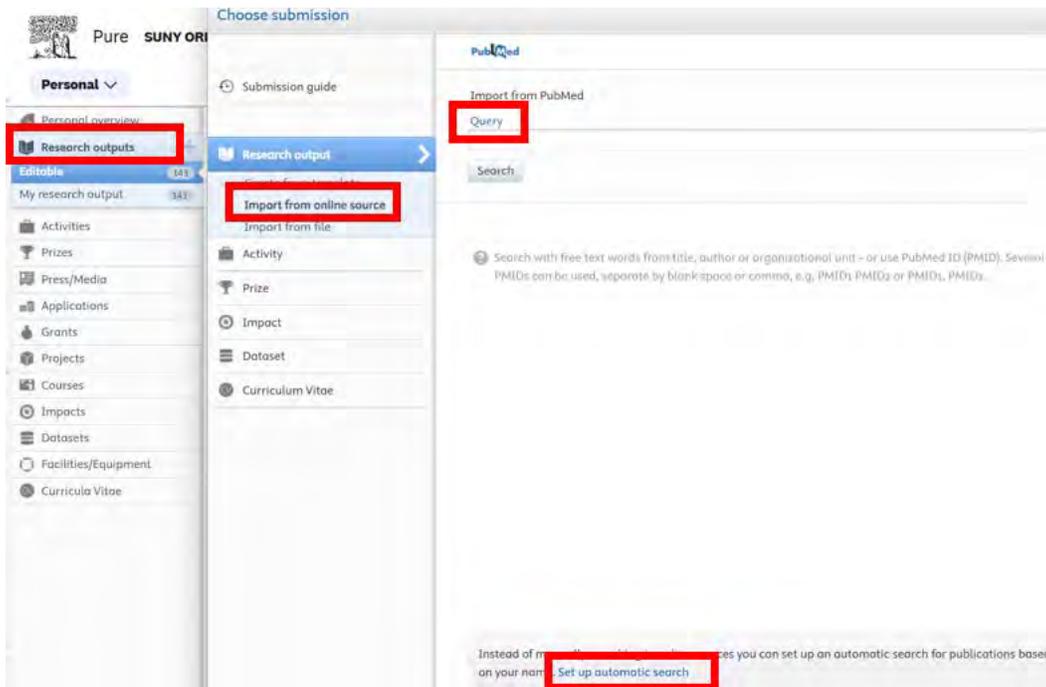
      ii. Surfaced publications will appear in the Task List. Then the Researcher or a "Trusted User" / "Editor" needs to "Import" to add the publication to the researcher's profile. If it is incorrectly associated with the researcher, click "Remove" to remove it from the Task List.

            1. This is a platform requirement, not a SUNY one.
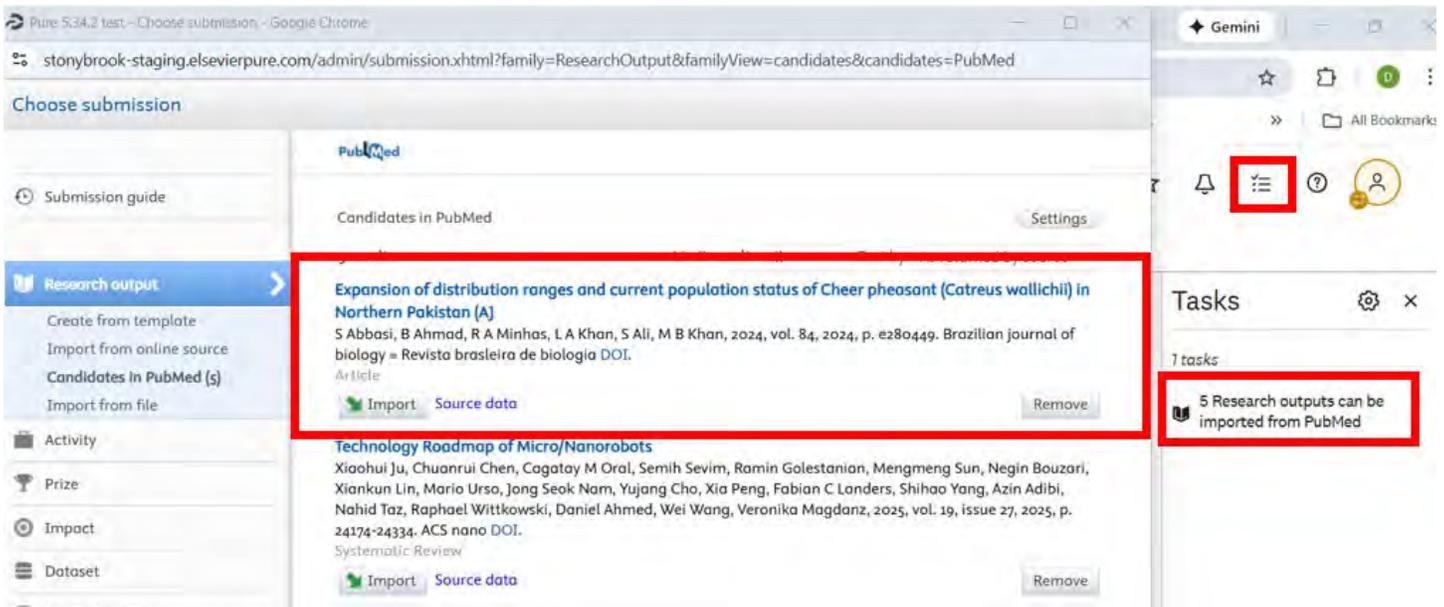
b. **Importing:** To add additional publications via file import (i.e., Open AIRE, Bib Tex, RIS), click "Research outputs" and "Import from file". Once you select the file type, you will have the option to "Paste text" or "Upload file" then click "Import".

Choose submission

- Submission guide

Research output >
- Create from template
- Import from online source
- **Import from file**

- Activity
- Prize
- Impact
- Dataset
- Curriculum Vitae

OpenAIRE

Use this option to import research outputs in the OpenAIRE CERIF profile XML format. OpenAIRE is an organization dedicated to shifting scholarly communication toward openness and transparency and facilitate innovative ways to communicate and monitor research.

BibTeX

BibTex is a tool and a file format which are used to describe and process lists of references, mostly in conjunction with LaTeX documents.

RIS

RIS-format is an interchangeable, tagged format for expressing bibliographic citations, supported by a wide range of reference software (e.g. Reference Manager, EndNote and RefWorks) and research databases (e.g Web of Science, Scopus etc.)

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Add a "Trusted User" to make changes on your behalf

Link to Elsevier Pure Help Center - <u>Add a Trusted User</u>, <u>Users as Only Trusted Users</u>

1. Click the Profile Menu (profile picture or ⊘) icon at the top right corner of the screen then select "User settings"
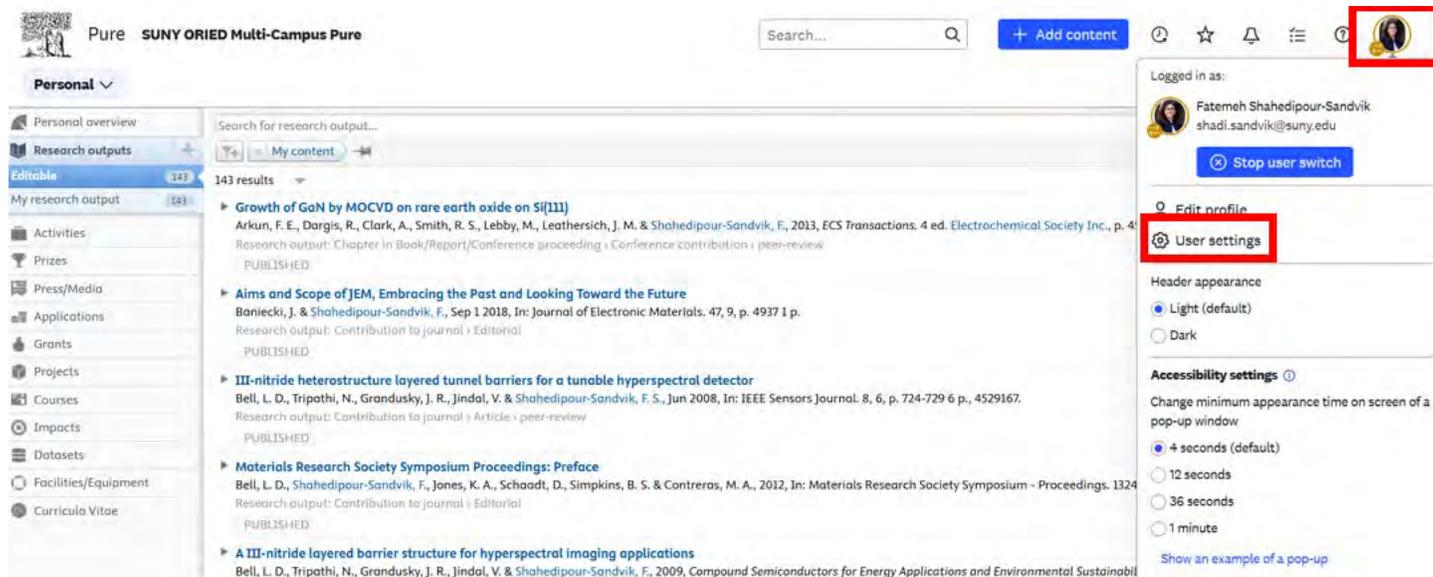
2. Scroll down, click "Trusted User", search for the user's name, then click save at the bottom of the screen

Toggle Award Amount Visibility on the Portal

Awards in SRC are listed as both an Award and Project. Awards contain the awarded amounts, and the Project is what is shown on the Portal. To remove the award amount but leave the award itself on the portal, follow these steps:

1. In the top left of the screen, click 'Personal'
2. Select 'Grants'
3. Search for the award you are looking for and click on it
4. In the top left corner of the screen, switch from the eye to the pencil
5. Scroll all the way to the bottom and select Visibility → Backend or Confidential
    a. Public – Visible on Public Portal
    b. Campus – NOT configured for use
    c. Backend - Visible on the backend to any authenticated SRC user
    d. Confidential – Visible on the backend to only administrators or users associated with the award
6. Save the record at the bottom

Toggle Award Visibility on the Portal

Awards in SRC are listed as both an Award and Project. Awards contain awarded amounts, and the Project is what is shown on the Portal. To remove the Award from the portal entirely, follow these steps:

1. In the top left of the screen, click 'Personal'
2. Select 'Projects'
3. Search for the award you are looking for and click on it
4. In the top left corner of the screen, switch from the eye to the pencil
5. Scroll all the way to the bottom and select Visibility → Backend or Confidential
   a. Public – Visible on Public Portal
   b. Campus – NOT configured for use
   c. Backend - Visible on the backend to any authenticated SRC user
   d. Confidential – Visible on the backend to only administrators or users associated with the award
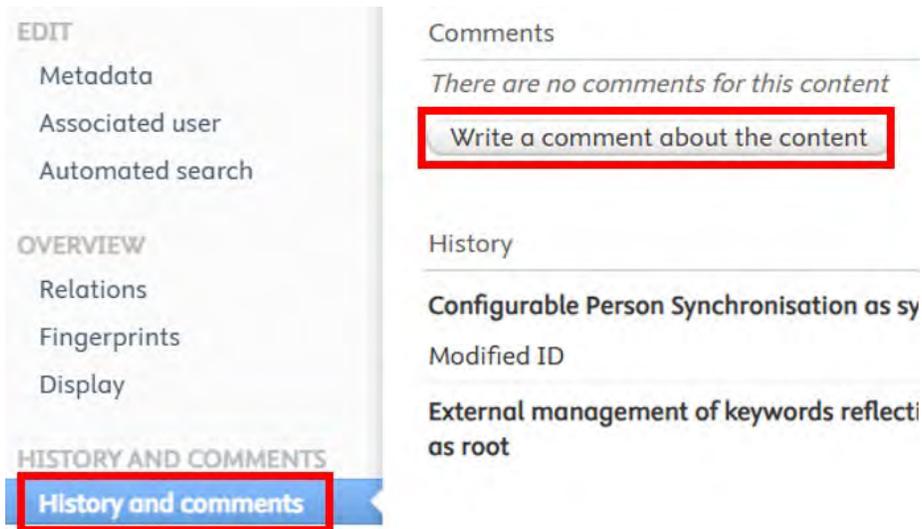6. Save the record at the bottom

Request Help

1. Click "History and comments" then click "Write a comment about the content" button

2. Write your comment / question and select which campus administrators to which the comments / questions will be routed

Content which can't be updated in SRC

- Persons (personal profile information)[1]:
    - Name (You may add a name variant)
    - Title
    - Suny ID
    - Scopus Author ID
    - RF Employee ID (if pre-populated)
    - Campus ID (if pre-populated)
    - Organizational Affiliation (you can add additional organizational affiliations, edit your affiliation start date and/or update your e-mail address)
- Grants / Projects (click the pencil icon at the top left corner of the screen)[1]:
    - Classifications
        - Grant type
        - Project type
    - Identification
        - Title
        - Project ID (i.e., Report Center "Award Number")
    - Grant holders / Participants
        - PI
        - Co-PI
        - Co-I
    - Grant / Project managed by
        - Managing organizational unit
    - Collaborative partners
        - Collaborative grant
        - Collaborative project
    - Funding (Grant only)
        - Financial
            - Note, you can hide this by clicking "Edit" and changing "Visibility" at the bottom of the screen
    - Life cycle
        - Actual start date
        - Actual end date
        - Award date
    - Related Project / Related applications and grants
    - AWARD PURPOSE CODE
    - AWARD TYPE
    - NACUBO CODE

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[1] Persons data is sourced from SUNY State HR and RF HR. Grants and Projects data is sourced from RF Sponsored Program data. To change the above data, make changes in the respective source systems and the data will flow through to SRC