

A series of thin, light blue wavy lines that sweep across the bottom half of the page, creating a sense of motion and depth.

# Quick start guide

# Welcome to Research Professional

To help you to take your first steps with Research Professional, this guide provides all of the information you need to get up and running.

More detailed instructions are available from the online User Guide, which you can find by clicking the help button once logged in.

Let's begin...

## Accessing the site

When you visit [www.researchprofessional.com](http://www.researchprofessional.com), you will have three options to gain access to the site:

- **Sign in:** If you already have an account, enter your username and password
- **Register:** If you don't have an account, click the 'Self registration' button to set one up
- **Campus Access:** If you are accessing the site from your institution, you can click on 'Campus access' to enter the site without needing a username and password. When using Campus Access, you will not be able to set up email alerts, save your work or access any personalised saved work

## When you first enter the site

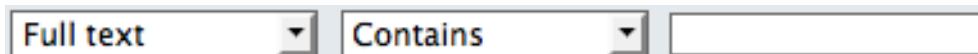
The first time you log in using your personal account, you will be taken to the induction screens. The induction process will help you to:

- Add shared resources to your own account
- Set up funding email alerts
- Take out an email subscription to a newsletter

After induction, you will see your 'Start page', customised by your institutional administrators.

## Funding and News

### Using the search bar:



- 1) Choose what you'd like to search for i.e., 'Disciplines' or 'Award type'
- 2) Choose how you'd like your criterion to be applied, i.e., 'Starts with' or 'Contains'
- 3) Enter/select your search options, i.e., pick disciplines from the available list, or enter text to search for
- 4) Click the 'Search' button to run your search

The four buttons next to the search bar, <image: buttons> will allow you to:



Add a new criterion

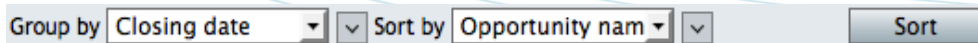


Remove a criterion



Re-order the criteria

### To sort your results:



Use the 'Sort bar' if you want to re-order your results

- 1) Group your results
- 2) Choose the order of results to be displayed inside their groups
- 3) Click 'Sort' to apply your change

### To view an item:

To view an item, click on its title and the item will displayed on the right hand panel - If you are viewing a funding opportunity, there will be three tabs in the right hand panel:

- Summary: a brief outline of the opportunity
- Full Record: an in depth description, containing contact details for the sponsor and links to their website
- Sponsors and programmes: the institution(s) sponsoring the opportunity, and the funding programme under which they are offering it

If you are viewing a news article, there will be two tabs in the right hand panel:

- Story: the text of the news article
- Links: links to related articles and external resources

### ***To save a search:***

Click inside the grey search bar. The search bar will become highlighted in blue.



The save button will flash in colour.

Click on it.

- 1) In the pop-up window, click 'Save as' and enter a name for your search. Click 'Save'
- 2) The search will be saved in the 'Saved searches' folder in the left panel
- 3) To re-run a saved search, open the 'Saved searches' folder and click on the search title
- 4) The search will be run afresh, so you will get the latest set of results that match the criteria of your search

### ***To create an email alert:***

You can create email alerts based on your saved searches. If you choose to receive an alert, you will be sent an email once a week containing any new items that match the criteria of your selected searches.

- 1) Click on 'Alerts', in the top right corner of the page
- 2) You will see a list of your saved searches. Check to box next to those you would like to contribute to your email alerts
- 3) Click 'Save' at the bottom of the page

### ***To bookmark an item:***

- 1) Select the items to bookmark by checking the box next to their title
- 2) Click the 'Save' button

- 3) Enter a name to create a new bookmarks folder, or select an existing one to add the selected items to it
- 4) Click 'Save'
- 5) To view your items, click on the 'Bookmarks' folder in the left-hand panel, and select the relevant folder

### ***To browse for funding:***

In the funding section, you can browse the database of opportunities by sponsor or discipline instead of building a search.

**Browse by sponsor**

**Browse by discipline**

- 1) Click on either of the browsing tabs
- 2) Locate the sponsor/discipline that interests you using either the A-Z list, or by searching for a specific name or term
- 3) In 'Browse by discipline', there is a third option: 'Browse Rodman Index'. This is a list of all the discipline terms, arranged in a three level hierarchy

### ***To browse the magazine archive:***

In the news section, you can view complete issues of any magazines you have access to online. The titles available will be listed in the left hand panel.

Click on a title to view the most recent issue, and to open an archive organised by year. If the magazine features funding opportunities, two tabs at the top of the 'Contents' section will allow you to switch between viewing the issue's news and funding.



### ***Using shared resources:***


Administrators at your institution can post shared resources (saved searches and bookmarked items) on your Institutional Start Pages for you to access.

- 1) Click on a shared resource's title to view it
- 2) You can save a shared resource by clicking in the grey search bar (which will become highlighted in blue), then clicking the 'Save' button
- 3) Choose 'Save as' to save a copy of the resource in your own saved searches or bookmarks folder
- 4) Choose 'Shortcut' to save the resource in your 'Institution resources' folder (you will not be able to edit items saved in your Institution resources folder)
- 5) Searches saved in both 'Saved searches' and 'Institution resources' folder will be available when creating email alerts


### **Edit Your Profile**

To access your user profile, click on your name in the top right corner of the page.


#### ***To edit your user profile:***

- 1) Click on the 'Edit' button,  under your name in the Contacts panel. Your profile will be displayed to the right
- 2) After making your changes, click on 'Save' at the bottom of the page to update your profile


### ***To edit your email alerts:***

- 1) Click on the 'Alerts' button 
- 2) Check the boxes next to any saved searches you would like to contribute to your email alerts
- 3) Click 'Save' at the bottom of the page to update your alerts profile

### ***To edit your magazine subscriptions:***

- 1) Click on the 'Subscriptions' button 
- 2) You will see a list of all of the magazines you have access to - check the box next to a magazine's title to subscribe to it
- 3) Click the 'Save' button at the bottom of the page to update your subscriptions. You will be sent an email whenever a new issue of the magazine is published

### ***To edit your group membership:***

- 1) Click on the 'Group membership' button 
- 2) Check the box next to a workgroup's name in order to join it

Joining a workgroup means you will be listed as a member of the workgroup, and may have access to additional resources created by that workgroup's administrators

- 3) Click 'Save' at the bottom of the page to update your membership

### ***To re-run the induction process:***

- 1) Click the 'Induction' button 