UNIWeb User Guide

September 20, 2016

UNI Web

Table of Contents

1. Introduction

UNIWeb is a research productivity software with two major components: an academic workflow system and a local academic network. These two components combine to create a system that eliminates the need to input the same academic data multiple times, as it exchanges data with other systems within an institution, and with external systems such as those of funding agencies, publishers, and partner organizations. Some of the information is also disseminated through the academic network, helping you stay current on the work of colleagues as well as find new collaboration opportunities within their institution.

UNIWeb is proudly developed in Ottawa by Proximify. For any questions not covered by this manual please contact support@proximify.ca.

The Problem

- You are constantly asked for updated CV information by your institution, projects, research centres and networks. This requires a great deal of effort and diverts your attention from producing new knowledge;

- External funding agencies require you to provide up-to-date information each year when you apply for funding;

- Keeping research information on your institutional website up to date is time consuming and requires more duplication of your CV information;

- It is difficult to be aware of the research work of your colleagues within your institution;

- When prospective graduate students compare universities, they can easily miss out on key research groups that have no web visibility.

The UNIWeb Solution

- A central CV platform that can be used for both internal and external needs;
- A "Yellow Pages" directory of faculty members, postdoctoral fellows and graduate students;
- A complement to other social research networks with a focus on your institution;
- Better visibility of the research work done within your local network;
- A way of letting prospective graduate students see what the research ecosystem of your university looks like, and where they would fit in;
- New channels of communication and engagement with graduate students and fellow researchers;
- A complete set of collaboration tools, which allow you to work with your colleagues directly within UNIWeb.

2. Your Curriculum Vitae

Your academic CV is the cornerstone of your UNIWeb account. You can use your UNIWeb CV to prepare for funding competitions, complete annual reports and create a public profile. Your institution can use your CV data to maintain institutional websites and to calculate metrics and produce annual reports on your faculty's performance.

The UNIWeb CV offers many benefits. UNIWeb is a web-based application. This means that you can access your CV data at any time, from any web browser. There is nothing to download or install and you will always have access to an up-to-date version of your CV.

An academic CV can become a very lengthy document over the length of a career. The UNIWeb CV is all contained on a single page. This allows you to use your web browser's Find function to search for specific information. The UNIWeb CV also has various section headers to help you navigate to precise points in the document (see ① in Figure 1).

You can either begin composing your CV from scratch, using UNIWeb's intuitive interface, or you can import your existing data from a variety of sources as outlined in sections 2.1 and 2.2.
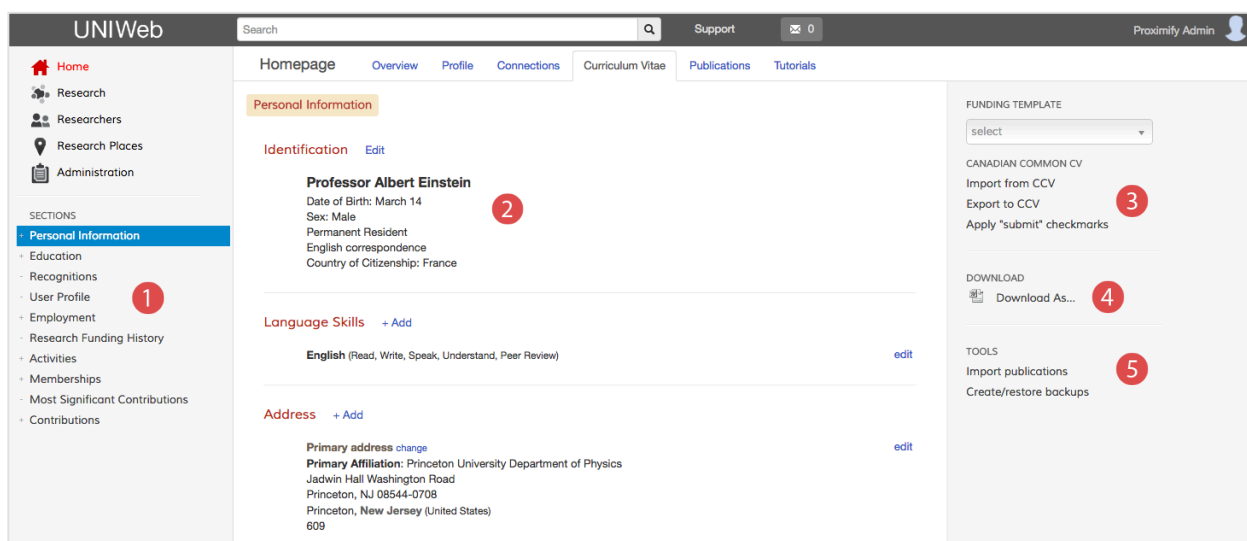

Figure 1 CV Page Overview ① Quick shortcuts to CV sections ② Current CV template view and editing area ③ Import from or export to the CCV website, restore CCV backups and CCV funding templates ④ Download various CV formats (Generic, OCGS) and file types (.pdf, .doc) ⑤ Import publications

2.1. Importing from the Canadian Common CV

If you are a Canadian researcher who already has data on the CCV website, you can import that data into UNIWeb.

A. When logged in to your CCV account, go to the menu bar and click **Utilities** to open the drop down. See Figure 2.

B. Click Export CV XML.

C. Click the "I'm not a robot" checkbox. See Figure 3.

D. Once you've passed the Captcha, click the **Export** button.

E. The file will be downloaded to your computer.

F. Log into your UNIWeb account. From the **Home** page, click the **CV** tab or button.

G. On the right hand side of the screen, click **Import from CCV**.

H. Click **Choose file**, and attach the file you just downloaded.

I. Click **Import**. When the file is finished uploading, click **Done.** You will be taken back to the CV tab.

Figure 2 The Utilities menu in the Canadian Common CV website. Export and import your CV information from this menu.
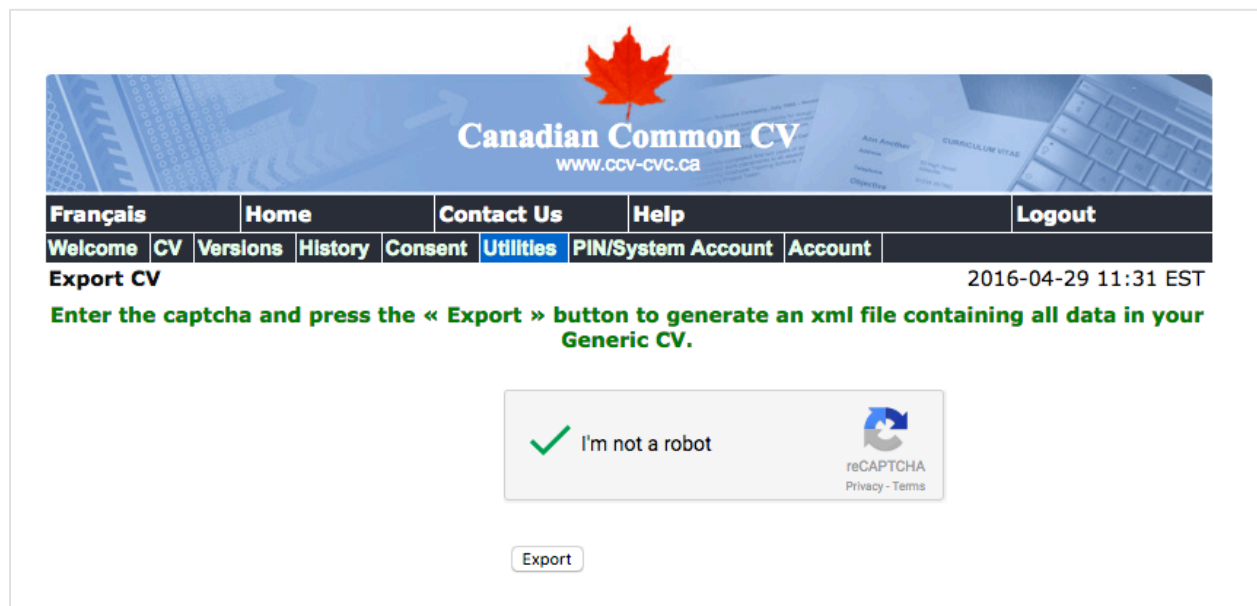

Figure 3 Pass the captcha and export the XML file.

With your data imported in UNIWeb, it is a simple process to make edits and updates with UNIWeb's CV editor. To learn how to export your data back to the CCV see section 6, Applying for Funding. To update your publications, continue to the next section.

Note: Downloading your CV information may take several minutes depending on traffic to the CCV website as well as the size of the file.

2.2. Importing your Publications

UNIWeb can import publications from a variety of sources including EndNote, BibTex, Google Scholar and PubMed (see ⑤ in Figure 1).

UNIWeb also ensures that it does not duplicate any of your existing publications. For BibTex and EndNote, you also have the additional benefit of only importing publications for which you are the author or editor.

Click the appropriate data source and follow the steps to import your publications. See Figure 4
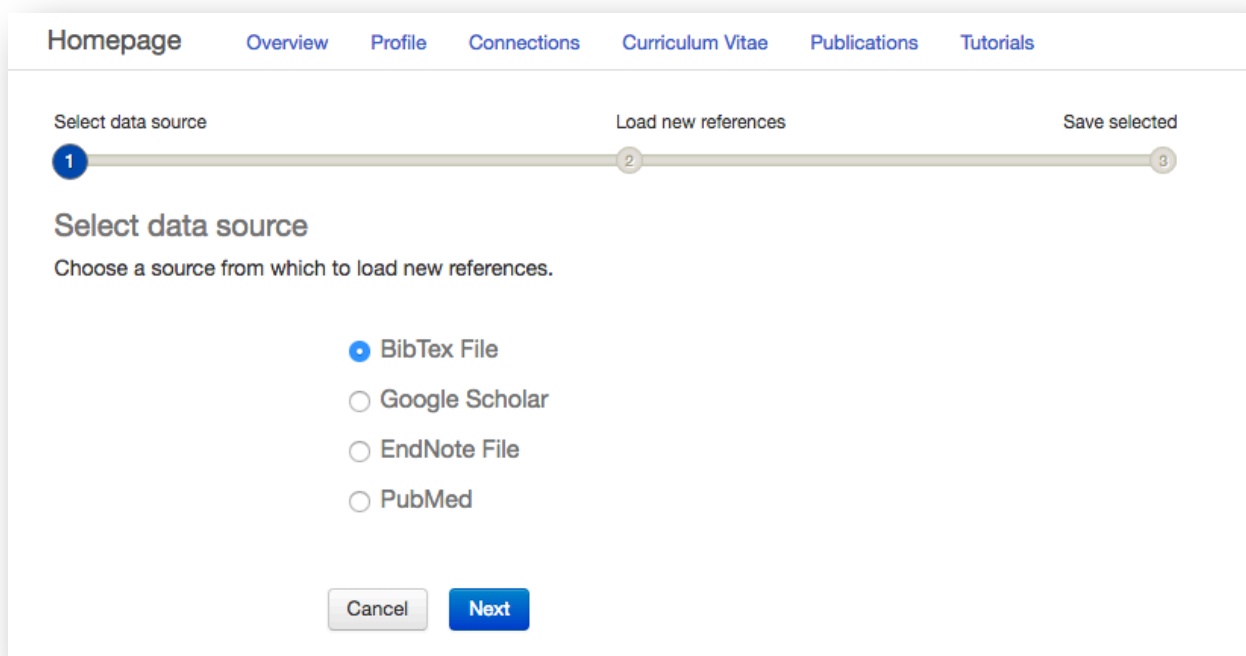

Figure 4 Importing Publications.

2.3. Filling out your Public Profile

Once all of your data is in UNIWeb, use it to quickly fill out your profile. On the **Profile** page, the bottom right hand side has a button labelled **Fill from CV**. A pop-up window will appear offering you to chose from the items available to copied from the CV. Select the sections you want, or chose **Select all** to quickly grab all of them. With your choices selected, click the button **Copy Selected to Profile**. This will add the selected items to your profile page. You are still free to edit the profile as you wish, changes to the information on the profile page won't affect the information stored in the
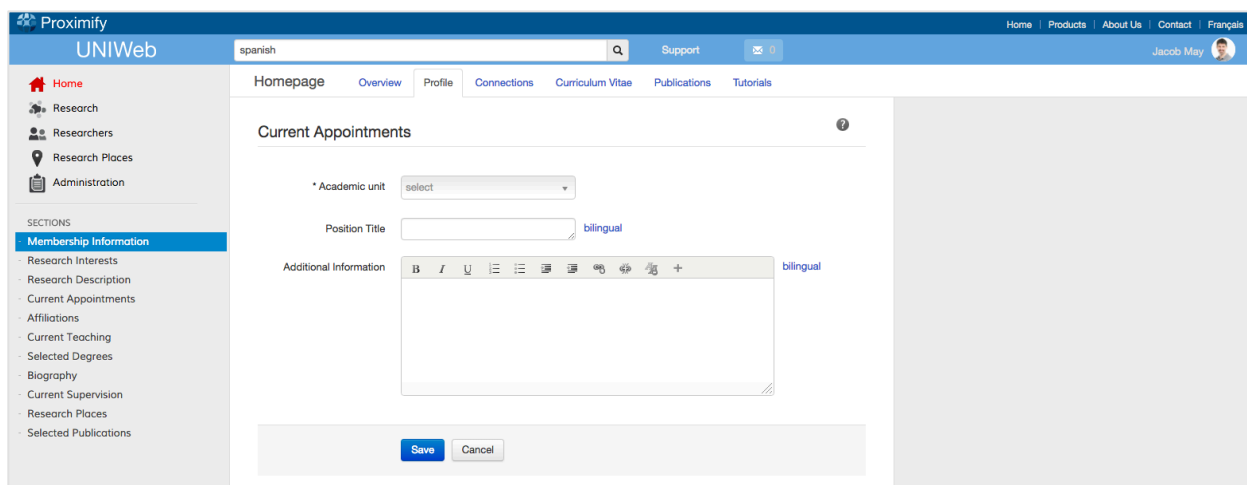
CV. To see how your profile looks to others, click the button on the top right that says **Public profile.** To get back, click the in the same place where is now says **Edit profile.**

2.4. Adding secondary Units to your account

If you are part of multiple units, for example, a department member as well as a member of an institute, you can include these cross-appointments on your profile. Adding your cross appointments includes you as a member of that unit, meaning that administrators can collect your academic data for reports and metrics pertaining to the secondary units.

While a unit is 'secondary' there is no hierarchy on how the system treats additional units.

To create a cross-appointment to a secondary unit, go to your profile and click **Add** next to **Cross appointments.** This will open up the following window:

Figure 5 Add secondary units, or cross appointments, to your public profile. This also aids administrators in producing reports and metrics for the units.

Select the academic unit using the drop-down. A title is optional. Additional information describing the appointment or related information is also optional. Click **Save**.
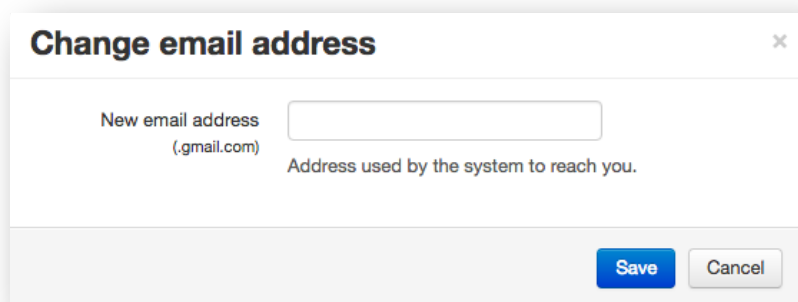
The appointment will appear on your public profile page. Administrators of that academic unit will also have access to your CV information for reports and metrics.

2.5. Emails on the profile

UNIWeb typically includes your email at the top of the public profile. However, not all users wish to have their email publicly displayed. You can alter or remove the email if you so chose. To do this, click the **edit** button in the top right corner of that section of the profile.

Note that the email field is starred as mandatory, this is because when your account was set up, this email was used to notify you. Alter your email in any way you so chose, and save your changes. In order to ensure that there is a functional email associated to your account (such as for password resets), go to the right side of the profile page, under the header **Account**.

Click **Change email address** (see Figure 6). This will open up a popup window where you can enter a functional email address. This email won't be displayed anywhere on the site.

3. Creating CV's and Reports

In addition to giving you an interface to edit your CV online, UNIWeb also offers the ability to download your CV.

Figure 6 Ensure that there is a valid email associated with your account if you don't want one publicly displayed.

A. From the Curriculum Vitae page, choose the Download Complete CV option (see ④ in Figure 1).
B. Select your desired CV layout.
C. Choose how many years of data you would like included in your CV.
D. Choose your desired file format (.pdf, .doc, .html).
E. Select Download.

If you select the Generic CV layout, your CV will retain the basic UNIWeb CV formatting. However, your institution may choose to include their own layout options here.

If your institution has made custom report templates available, select the one you want to generate. Your CV data will be automatically entered into the template and formatted to fit the specific requirements dictated by your institution.

4. Identifying Potential Collaborators and Advisors

More and more, research grants are awarded to multidisciplinary groups with the right combination of expertise, knowledge and experience. UNIWeb allows researchers to find potential collaborators and graduate students within their own university. The software's objective is to achieve a measurable increase in the number of grants awarded to faculty members.

UNIWeb lets you recognize and find potential collaborators through a multitude of channels, allowing you to build stronger teams of experts. The subsections below discuss the different tools and strategies that can help you to identify people of interest within your university.
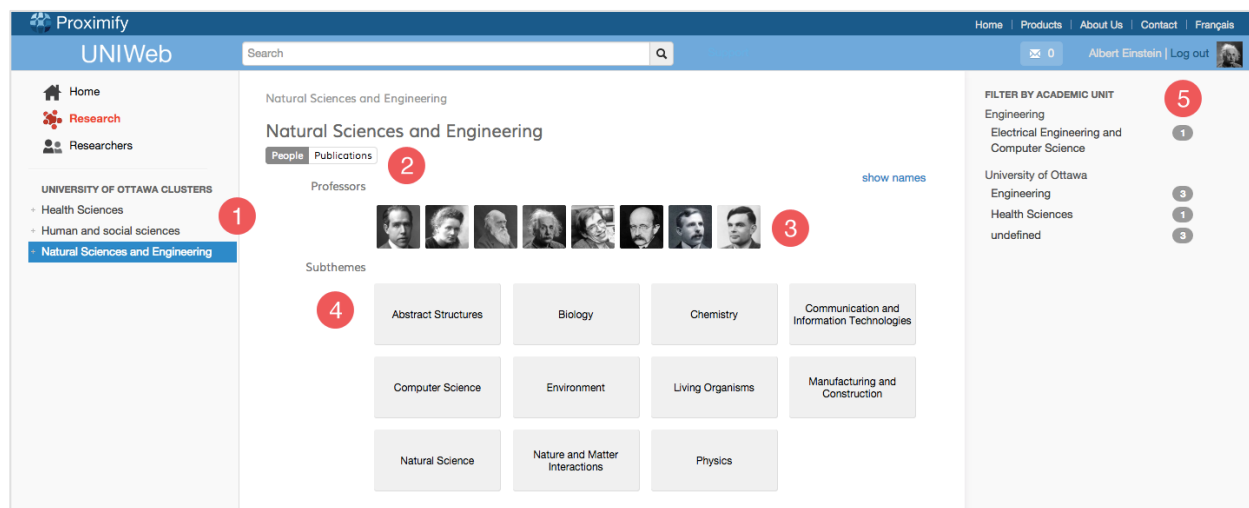

Figure 7 Research Cluster Overview ① Hierarchal list of research clusters. ② Toggle between displaying People and Publications. ③ List of people grouped by type. ④ List of sub-themes within which those people are interested. ⑤ Filter by academic unit

4.1. Using Filters

All UNIWeb network pages include powerful filters to help you easily browse or search your colleagues (see ⑤ in Figure 7). Page content can be filtered by selecting options under different filter categories. Clicking one filtering option will narrow the results, while selecting more options under the same category will make the filter wider.

Selecting filtering options under different categories creates a narrower filter that combines the options across categories. You can turn off a filtering option by clicking it again.

4.2. Finding People within Specific Research Areas

Research clusters span multiple departments and faculties (Figure 7). When viewing a research area, you can see the multidisciplinary nature of its members without being restricted to individual faculties or departments.

You can use UNIWeb's search bar feature to find individuals by name or you can find researchers that share particular interests by exploring the research clusters. Choosing a specific research area allows you to view people who are interested in that research area as well as the sub-themes of that area.

By default, all people belonging to the research cluster being viewed share a common high-level interest or connection. The filters on the right allow you to display individuals and sub-themes that are found in specific academic units.

4.3. Finding People with Common Research Interests

Selecting a person under the Researchers sections allows you to view their Profile and Connections. By selecting their Connections you can view the people with whom they share a common research interest (Figure 8). You can then use the filters on the right to narrow down their connections by category, academic unit and research interest.
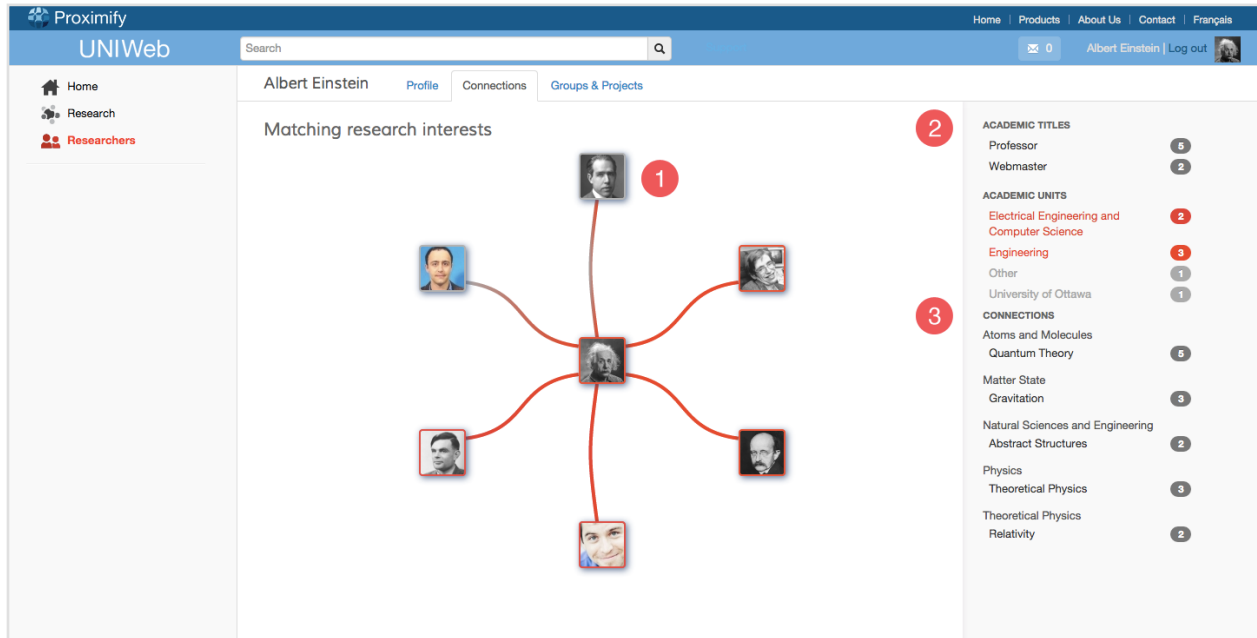
Figure 8 Connections Page Overview ① Mouseover thumbnails or connections for detailed information, click on a thumbnail to jump to that person's network. ② Filter connections by categories and academic units. ③ Filter connections by research interests.

The easiest way to find colleagues with common research interests to yourself is to view your own public connections. These can be found by either selecting the Connections tab at the top of the Home page or by finding your name in the list of researchers and viewing your connections.

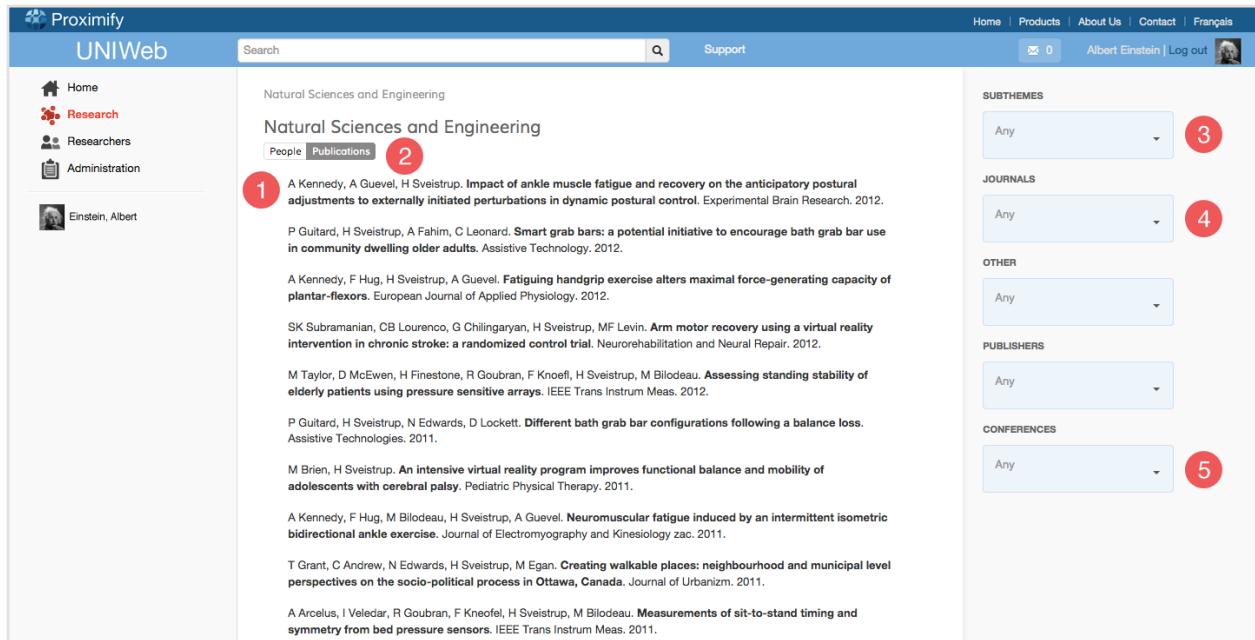*Figure 9* Research Cluster Publications Overview ① List of publications. ② Toggle between displaying People and Publications. ③ List of sub-themes of the publications. ④ Filter by journal name. ⑤ Filter by conference name.

4.4. Finding People who Publish in Specific Journals or Conferences

You can find people who publish within a particular research area (and its sub-themes) by searching for it in the UNIWeb's search bar and then clicking the Publications tab (see ② in Figure 9). In this view you will have access to various filters that allow you to identify the researchers who publish their work in specific journals and/or conferences (see ④ and ⑤ in Figure 9).

Selecting a journal filter will display results that span various themes. Conversely, selecting a journal with a specific research area and sub-theme will refine the results to only those that meet both criteria.

4.5. Finding People Based on Geographical Location

UNIWeb boasts a powerful GIS (geographic information system) feature that allows you to search for members of your network based on location. This can be extremely helpful when searching for collaborators who have expertise in a specific region.

On your profile page, there is a section titled Research Places. This allows you to define a location where you have conducted a research activity. You begin by entering an address. Then, you can add a description, choose a type of research activity and even tag your location with research interests. You have can optionally specify a start and end date.

Once you have added locations to your profile, you will now appear in the 'Research Places' section of UNIWeb. To find other researchers, you can search the filter based on name or location, and you can optionally filter by title or academic unit.
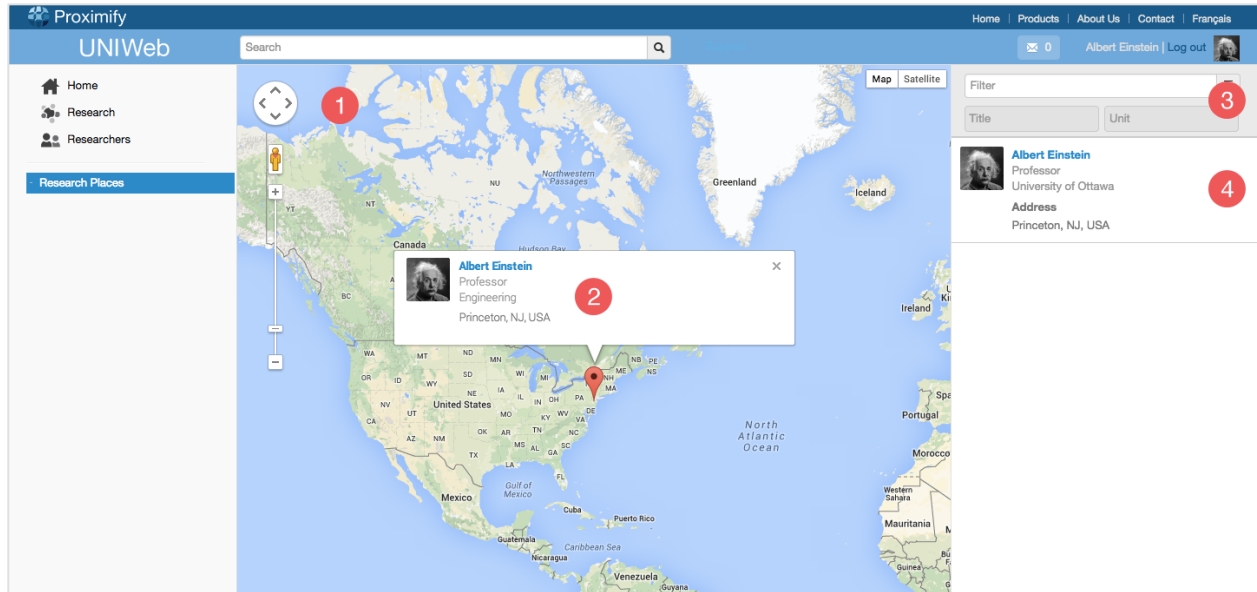
Figure 10 Research Places Overview ① Researchers displayed on map. ② Profile summary. ③ Filter by name, address, title and academic unit. ④ Search results.

5. Collaboration

Account delegation allows UNIWeb users to grant other UNIWeb users access to their account. This system is fast and secure, with no sharing of passwords or privileges between users. All you need

are each other's names. Special privileges or administrative access is not shared, even between users with the same level of account access.

If you want to invite someone to assist you on your account, go to **4.1, Inviting Account delegates**. For being an assistant on someone else's account, go to **4.2, Requesting delegate access.**

5.1. Inviting Account delegates.

In order to invite a delegate to your account, that is, to allow someone to have assess to your account, click your username in the top right of the screen (see ① in Figure 11). This will open a dropdown. In the dropdown is an item called **Delegate access.** Next to that it says **Invite** (see ② in Figure 11).
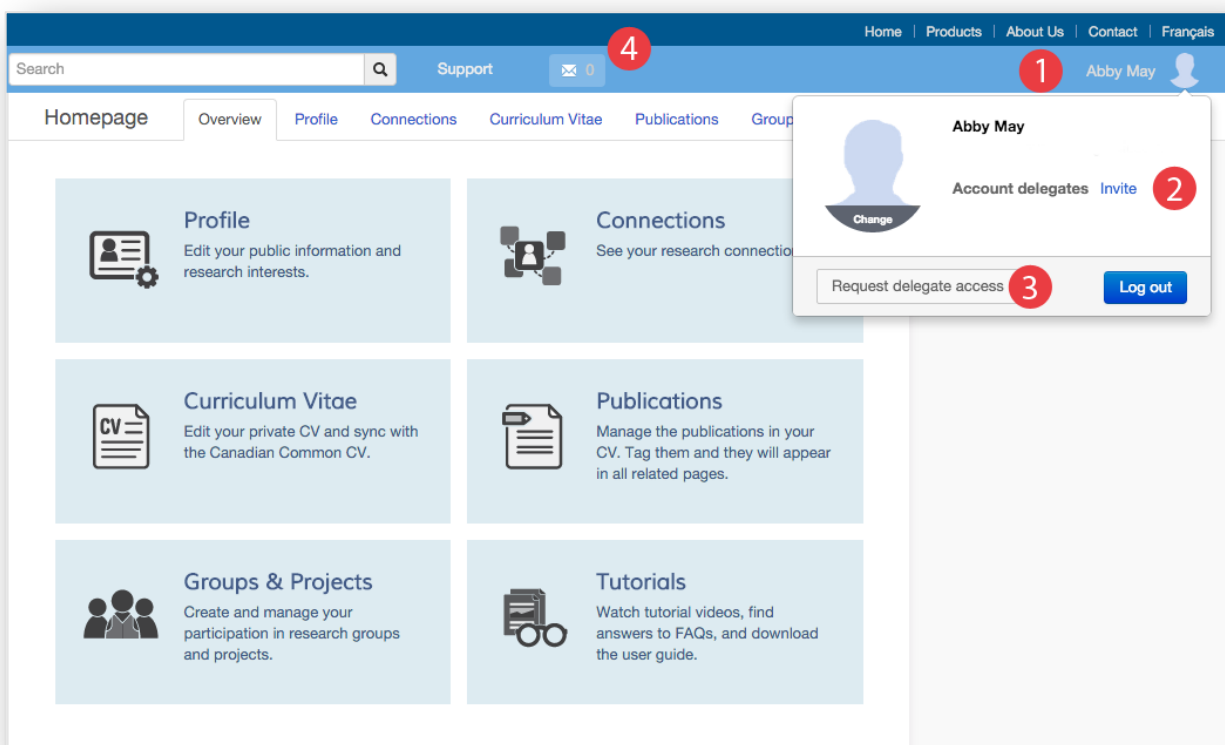

Figure 11 User Account Dropdown ① Username. ② Account Delegates Invite button. ③ Request Delegate Access button. ④ Notifications.

Click **Invite,** and a pop-up window will appear with a list of all UNIWeb users (see Figure 12). You can scroll through the drop-down or type in the name of the person you want to have access to your

account. Click their name, then click the **Send** button. This will send your invitation to that user. They will get a notification that you've invited them to use your account.
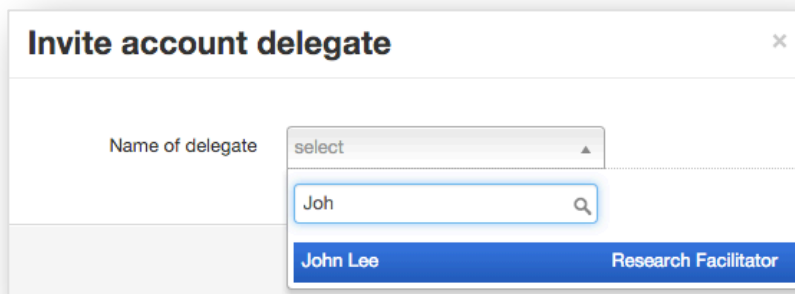

Figure 12 Finding account users

Once they have gotten the notification, they will receive immediate access to your account, and you will see them listed under the **delegate access** heading in the drop-down from your username. If you want to remove their access, click **Remove** next to that account. They will lose access to your account immediately, and they will be notified that you have revoked their access.

5.2. Requesting delegate access.

By requesting to assist on an account, you are offering to be a delegate. Go to your username and click it. This will open a drop-down. At the bottom of the drop-down is a button **Request delegate access** (see ③ in Figure 11). Click that, and a pop-up window will appear, listing the users in UNIWeb.

Use the drop-down or type in the name of the user you want to have access to. Select their name, then click **Send.** UNIWeb will then send a notification to that user, telling them that you want to have access to their account.

Once they approve, you can start using their account. To do this, go to your username and click it to open the drop-down. At the bottom are all the accounts you have access to. Simply click the name of the account you want to enter and you will immediately switch to that account.

Check the username at the top right of the screen to see whose account you are in. Once you are finished using that account, click the username and you will find your account listed at the bottom of the drop-down. Click your username to go back to your account.

If you want to revoke your access to an account, click remove next to that name; they will disappear from your list and you will not be able to enter that account anymore.

6. Research Interests

Research interests are one of the most important components of a UNIWeb network. Research interests are what creates the connections between members of your network.

Every UNIWeb network comes with an extensive, pre-defined list of research interests. This list comes directly from the CCV. However, as a user, you also have the option to add additional research interests.

Research interests are nested. Meaning that parent interests are subsequently broken down as they get more specific. When adding a new research interest, it is important to be as specific as possible. For more information on the hierarchy of research interests, please see the example in 5.1.

6.1. Adding Research Interests to your Profile

To add a research interest to your profile, begin by navigating to the Research Interests section. There are two ways to add a research interest from your network's existing list. First, click within the text box and scroll through the list of available options. Second, begin typing your desired interest in the text box and UNIWeb will refine your results.

You also have the option of creating a new research interest. To do this, you must select a parent interest and then create a new interest name (Figure 13). In some cases, you may need to add several nested interests at once. To do this, simply separate their names with ">".

Example

Nest New Theme Under: **Health Sciences**

New Theme Name: Aging > Chronic Diseases in the Elderly > Alzheimer's Disease

This will create Aging as a new theme and nest it under the existing theme of Health Sciences. In turn, Chronic Diseases will be created and nested under Aging and Alzheimer's Disease will be created and nested under Aging. Finally, Alzheimer's Disease will be added to your Research Interests.
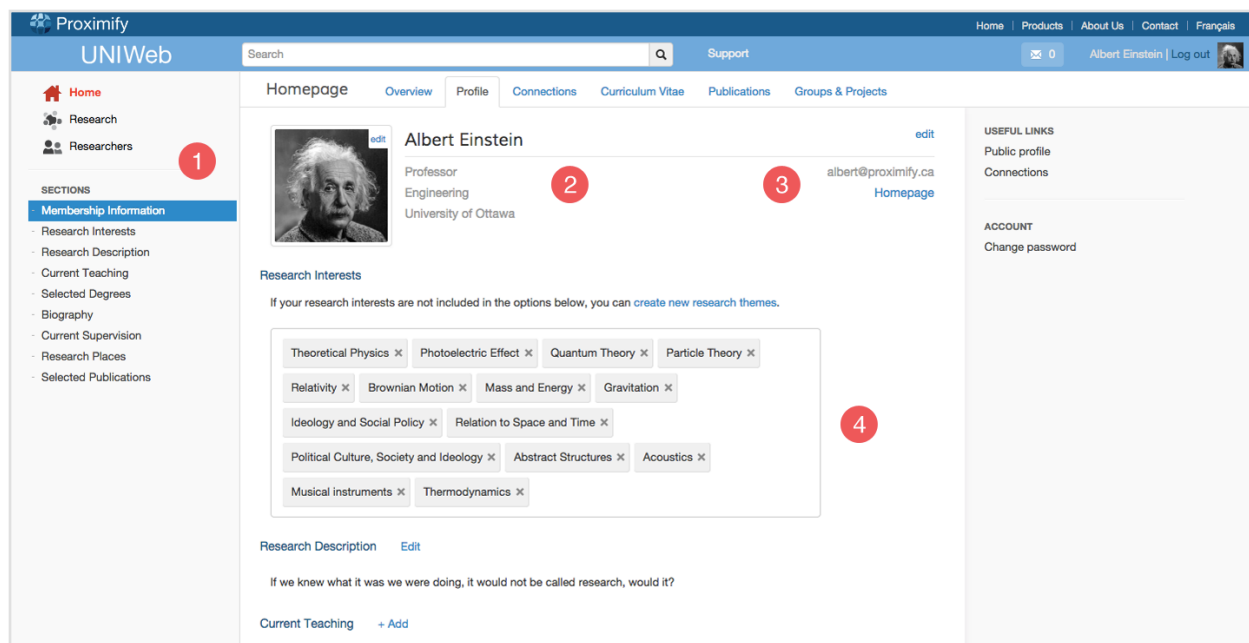
Figure 13 Profile Overview ① Profile sections. ② Name, title, department, institution. ③ Contact information. ④ Research interests.

6.2. Tagging your Publications

UNIWeb gives you the option to tag one, or many, of your publications with a research interest. Other users will then be able to locate this publication by research interest and it will appear on your UNIWeb profile.

To begin, navigate to the Publications page or the Publications section of your CV. Select your desired publication or publications and choose Add Tags from the right-hand menu. You will be presented with a list of research interests that you have already applied elsewhere in UNIWeb. However, you also have the option to add new research interests from your network's list.

To remove a tag, simply select your desired publication or publications and then choose Remove Tags from the right-hand menu and follow the same process

6.3. Tagging your Research Places

When you add or edit a research place, UNIWeb gives you the option to tag it with a research interest. To find your desired interest from your network's list, you can either scroll through the list or you can begin entering the name in the search field and UNIWeb will refine your results.
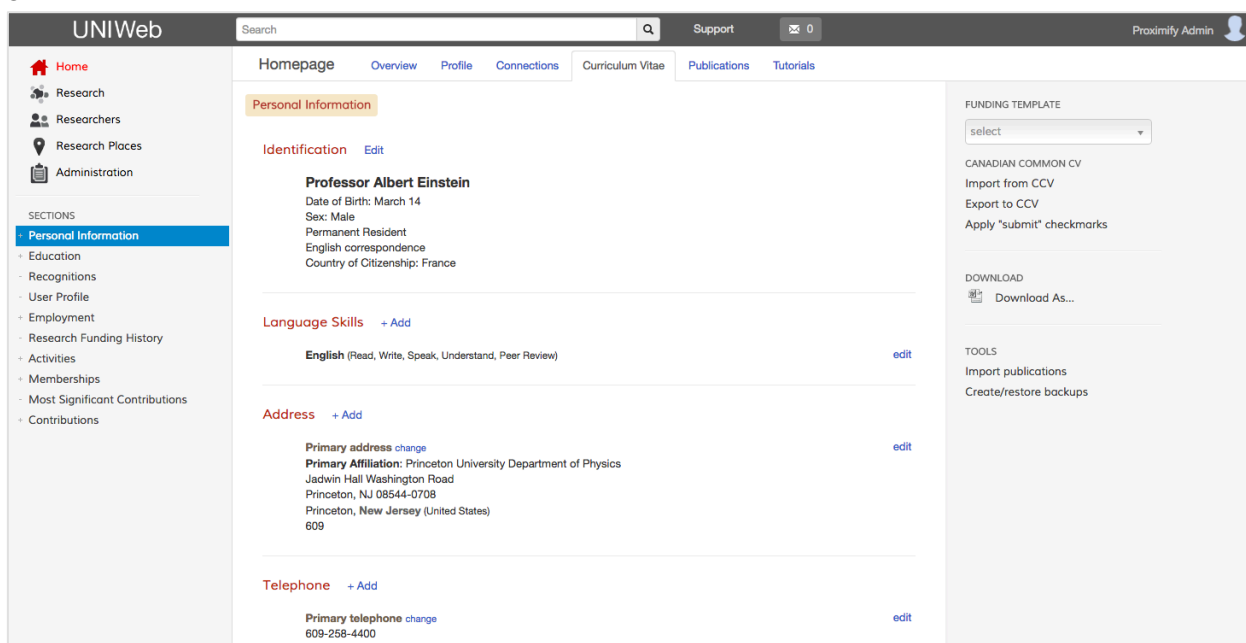
By tagging your research places with interests, you will increase your visibility on the Research Places page and will allow your colleagues to find you based on your research interests.

7. Applying for Funding with the Canadian Common CV

The process of applying to a funding agency that requires a CCV submission begins by exporting your CV from UNIWeb to the CCV website. The necessary steps are described below.

On UNIWeb

1. Enter your information into the UNIWeb Curriculum Vitae interface.

    a. If you have already begun a CCV on the government site, you can import your work directly into UNIWeb (see section 3.1).

    b. If you know the agency to which you are applying, select your desired Funding Template (see ③ in

Figure 14). This will condense the CV to only the required sections and fields of that agency, and will verify that all required fields have been correctly filled.[1]

---

[1] The generic CCV is almost void of restrictions for required data but provides the most rich data options. The individual agencies have stricter field requirements and fewer fields.

2. Select the **Export to CCV** option from your right-hand menu (see ③ in
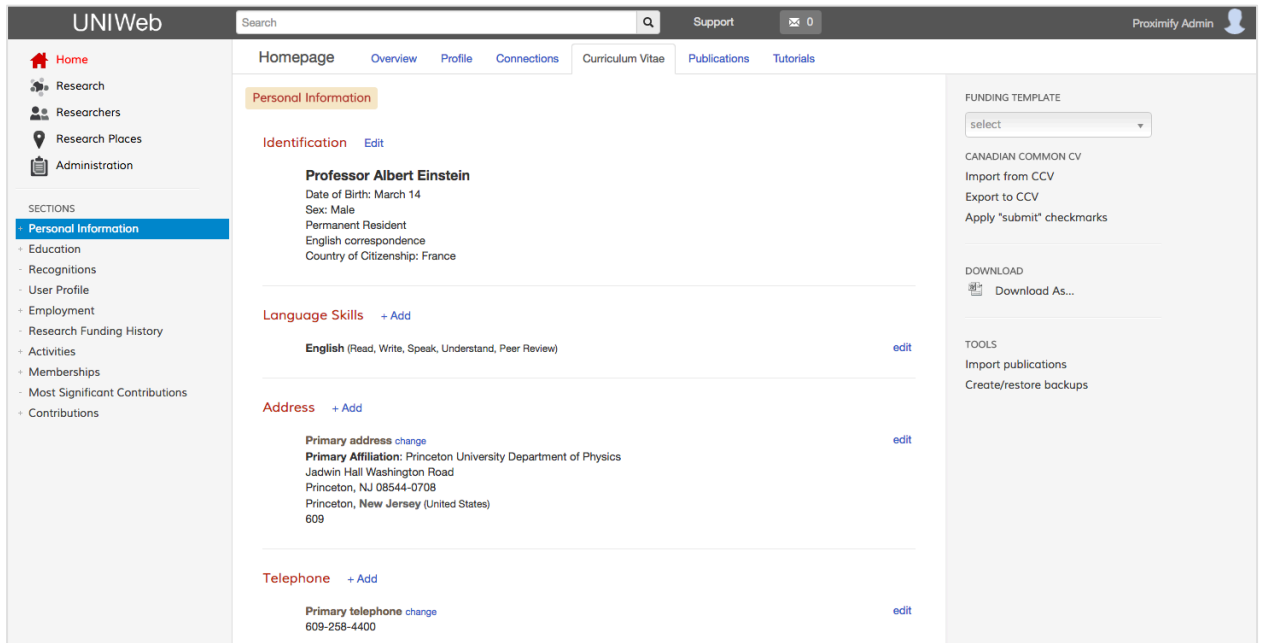

Figure 14.)
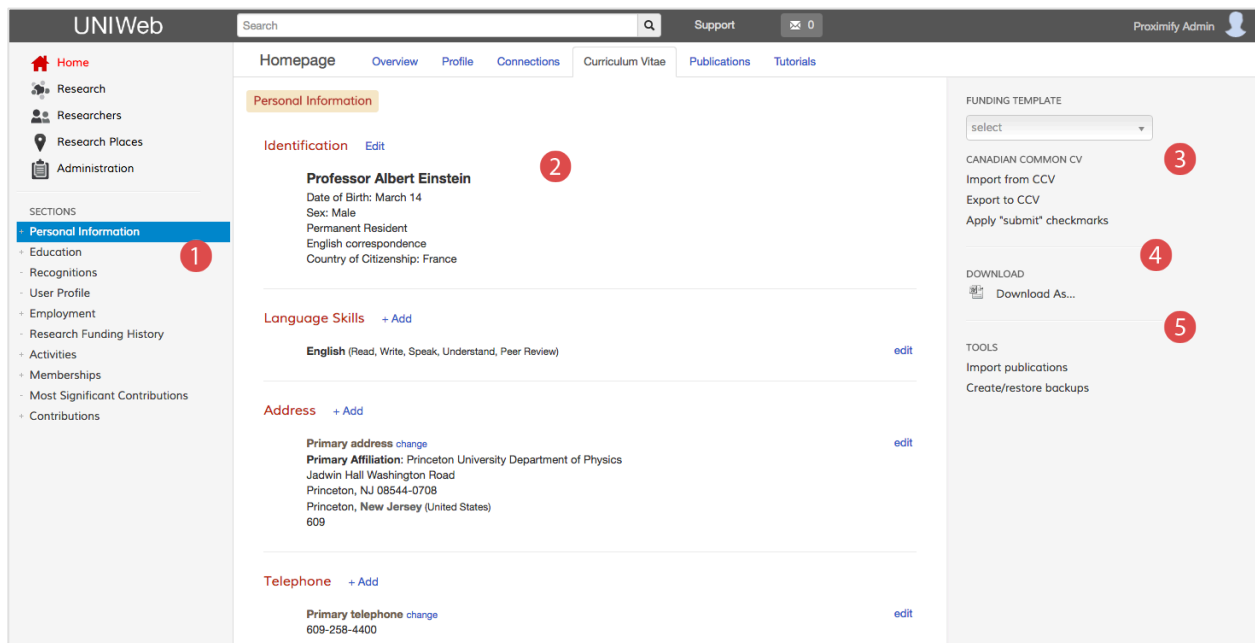
3. Click Download CCV XML.

*Figure 14 –*CV Page Overview ① Quick shortcuts to CV sections. ② Current CV template view and editing area. ③ Import from or export to the CCV website, restore CCV backups and CCV funding templates and/or Apply "Submit" checkmarks. ④ Download various CV formats (Generic, OCGS) and file types (.pdf, .doc, .odt). ⑤ Import publications.

Note: Take caution if you have multiple tabs of the CCV open if you are importing to the CCV. Close the tabs that you are not using to ensure that the older version doesn't save over the version you just imported.

7.1. On the CCV Website

Once you have downloaded the CV file, you are ready to continue the application process on the CCV website.

1. Log on to the CCV website.
2. Navigate to Utilities, and click **Import XML CCV.**
3. Click **Choose file** and attach the file you just retrieved from UNIWeb.
4. Pass the Captcha.
5. Click Parse.
6. Once the information loads, click **Select all** and click **import.** See Figure 15
7. The CCV will warn you that you are overwriting the older version of the CCV. Click **Yes.**
8. You have now updated your CCV. Select your funding template and go through your checks as usual before submission. If you need to apply Submit' checkmarks, go to the next section on how UNIWeb can perform your 'Submit' checkmarks for you.
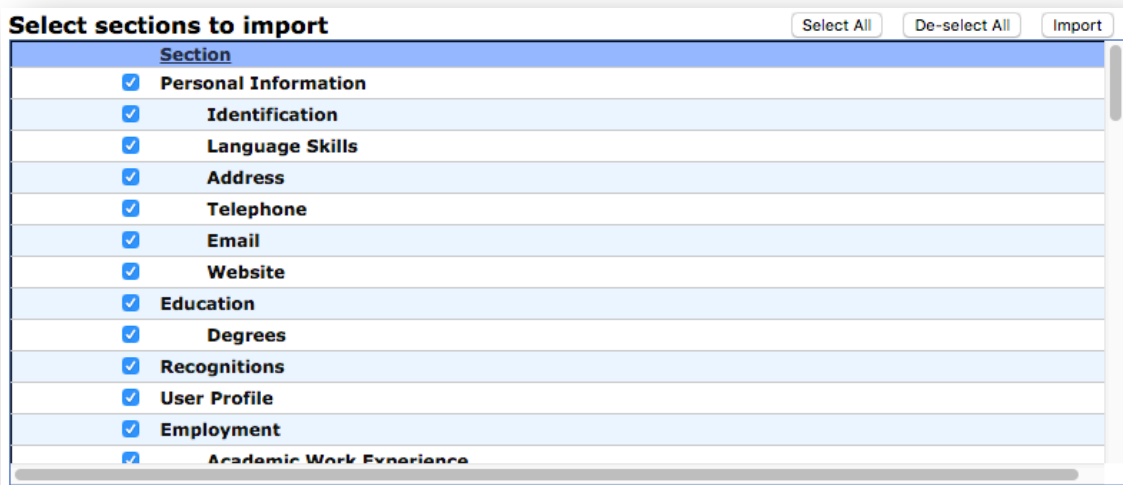
Figure 15 CCV page, select all and import.

7.2. Applying 'Submit" checkmarks

Some agencies only require information going back a set number of years. For example, some SSHRC applications require only the last 6 years of publications. In this case, you must uncheck the 'Submit?' field of each publication that does not meet the condition. This may be done on the CCV website or you can choose to have UNIWeb perform the checkmarks.

1. From UNIWeb, on the CV edit page, click **Apply "submit" checkmarks** See ③ in Figure 1

2. Enter your CCV username and password so that UNIWeb can access your CCV account.

3. Select the funding template, the date the checkmarks should start at (Oldest and moving forward to the present). You can choose what sections to apply the checkmarks.

Figure 16 Apply CCV Submission Checkmarks based on dates. ① Enter CCV username and password. ② Select the Funding template ③ Select the date range (oldest acceptable date). ④ Select what sections you want to apply the checkmarks to (Standard is to leave them all selected). ⑤ Click to apply the checkmarks.

8. Improving Discoverability

Having a web presence can be important for connecting with colleagues outside of your institution as well as allowing your work to be seen by a larger audience.

When you activate your UNIWeb account, you are given a professional profile. A basic profile will display a name, title, academic unit, contact information and perhaps a profile picture. However, there are benefits to adding additional information to your profile.

First, this profile helps you to connect to, and share information with, members of your network. It is easy to add information by simply clicking on the Add or Edit button next to each section.

Second, this profile serves as a valuable web presence. When you select the Public Profile option, you can see how your profile appears publicly. Potential colleagues can now find up-to-date

information on your research interests, publications and more by simply entering your name into their search engine.

Note: It is not mandatory to complete this profile. You are not required to enter any information that you do not feel comfortably sharing publicly.

9. Frequently Asked Questions

Q1. I have already spent 2 weeks creating my Canadian Common CV on their government website, what is the benefit of using UNIWeb's CV conversion function?

We understand the headache involved in using the interface provided by the CCV website. Fortunately, things will be much easier going forward thanks to UNIWeb's modern interface, which is designed to simplify data entry efforts and save you valuable time.

Q2. I don't have to submit an application for funding this year, how is the software useful to me?

While professors are often looking to attract talented individuals to help them achieve their goals, researchers (including graduate students and postdoctoral fellows) are similarly trying to find professors working on interesting projects. Getting connected is often the struggle.

The challenge lies in the fact that information pertaining to a given research theme, including work that has already been done within your institution, academic unit or by a group of researchers, is often scattered and hard to find. UNIWeb provides researchers the means to share their achievements in a visually engaging manner, all in one place.

There are two necessary steps to achieve better visibility. First, take a few minutes to input your research interests. This will let anyone in the world who visits your web profile see what you are working on, and how those research interests connect you with other researchers in your network. Second, label your publications with appropriate research themes. This will let visitors and colleagues find you by searching for people that publish in the same journal and conferences. This will also demonstrate your level of expertise in each research topic.

Entering these two critical pieces of information will attract prospective students, and promote interdisciplinary collaboration, all while getting a head start completing your CCV.

Q3. Can't people already find me on the faculty website? Why should I put time into creating a UNIWeb account?

Most university websites are built on the premise that people will know under which faculty and department to look for research done within their areas of interests. However, this structure does not facilitate the interdisciplinary initiative. If the same topics can be studied from a multitude of angles by researchers across a university, why is the web content only accessible through faculties and departments?

UNIWeb does not follow this model; research themes are not attached to any particular department or faculty. However, viewers can still slice the information by such parameters using the powerful filtering options offered by the software. UNIWeb promotes multidisciplinary research by providing overlapping views of the research done across your university.

By entering your publications and research interests, you will increase your personal web visibility, as well as that of your Faculty. Prospective students, alumni and researchers abroad will be able to understand your work within the context of your colleagues in the university.

Q4. I barely have time to update my CV, how is the software going to help me with writing my CCV?

Submitting your CCV is now an inevitable step when applying for governmental funding. Whether you need to apply for funding this year or not, you will eventually have to go beyond updating your own CV. This is where we come in. You can input your information in UNIWeb's up-to-date CCV templates, without worrying about the complex interface of the CCV website.

In addition to cutting down the time and effort required to create your CCV, the UNIWeb CV lets you reuse that data to generate your academic CV with a choice of layouts, such as that preferred by your institution.