



User Guide Release v1.1

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INTRODUCTION

<u>Discover Your Colleague (DYC)</u> was established as a collaborative resource that will promote your innovative research across the St. John's University academic community. Serving faculty, students, and the community at-large, DYC will help our institution recognize achievement, and engage students and other faculty in active multidisciplinary research endeavors.

Faculty who utilize this system can export views of their scholarly work, identify faculty conducting research in areas of interest, and seek colleagues for collaborative projects. We believe the ability to promote scholarly activity among the St. John's University community raises the visibility of our achievements and helps us all to grow as a research community.

Students benefit also, as DYC allows for faculty research programs to gain visibility and provide avenues for students to become actively involved. By providing students such high-level opportunities to engage in research, we continue the student-centered approach so integral to our vision and mission.

Multiple groups across the University are already using DYC. The Venture and Innovation Center (VIC) utilizes DYC to connect faculty and students with needed resources as does the Office of Grants and Sponsored Research.

This document was created as a companion and user guide to navigating and participating in the DYC tool. Please email maddoxd@stjohns.edu with any questions or additional clarifications and updates to this document.

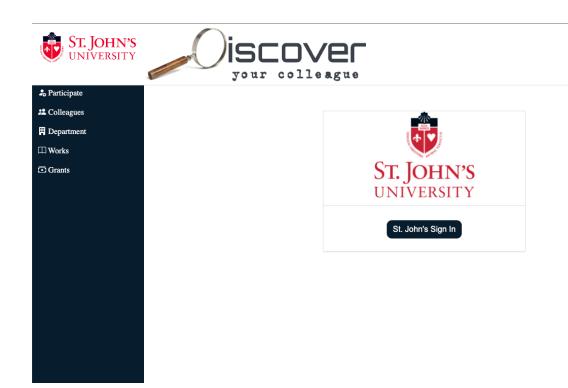




1. GETTING STARTED

DYC Can be found by clicking HERE, or by visiting https://data.stjohns.edu/DSA/dyc/

Once you have arrived at the website for the first time, you will be presented with this screen:



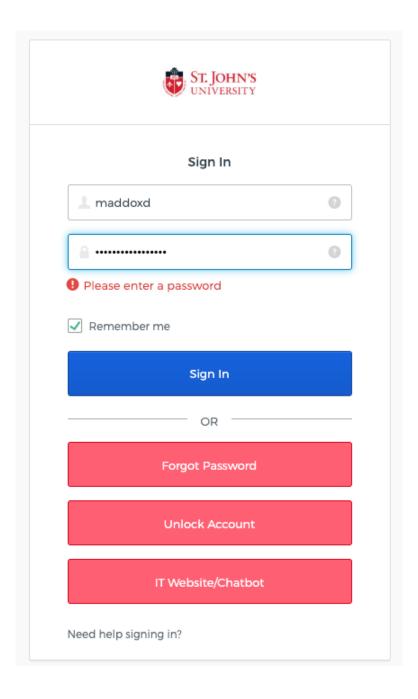


Office of Data Science and Analytics



Access is granted via the universities OKTA system (Single Sign On).

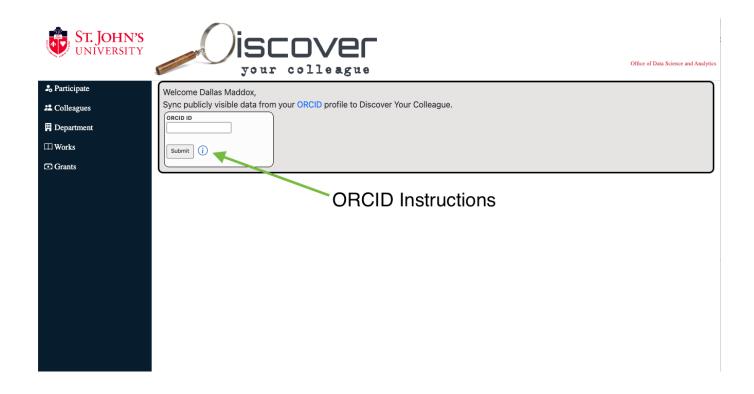
The subsequent screen will require your OKTA/St. John's credentials, similar to "signon.stjohns.edu". The screen will look like this:







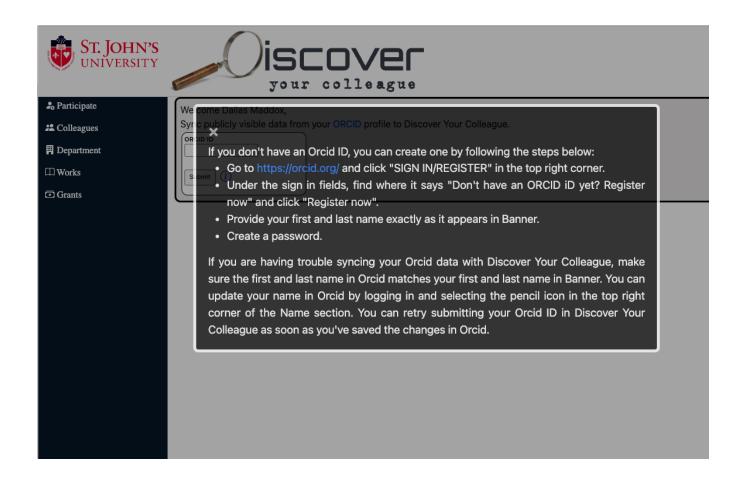
Once you have authenticated, you will be presented with a default participate option (After you participate, this will no longer be the default screen. It will subsequently default to the "Colleagues" screen.)



If you are already familiar with ORCID, you can enter your ORCID ID here and proceed. However, if you are not familiar with ORCID or do not have an ORCID ID, you can click the little blue "i" as indicated by the green arrow above. TIP: Anytime you see a blue "i" this contains a quick help page.

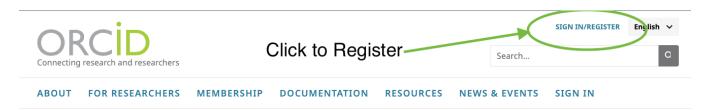


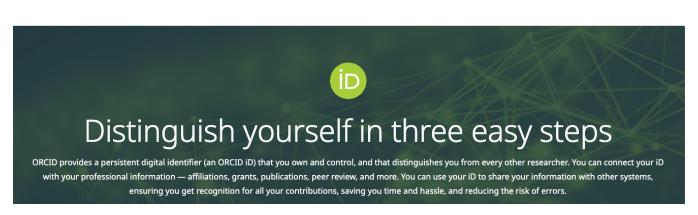
Doing so will reveal these instructions, asking you to visit https://ORCID.org/





Once you have visited ORCID.org, you will see this screen:

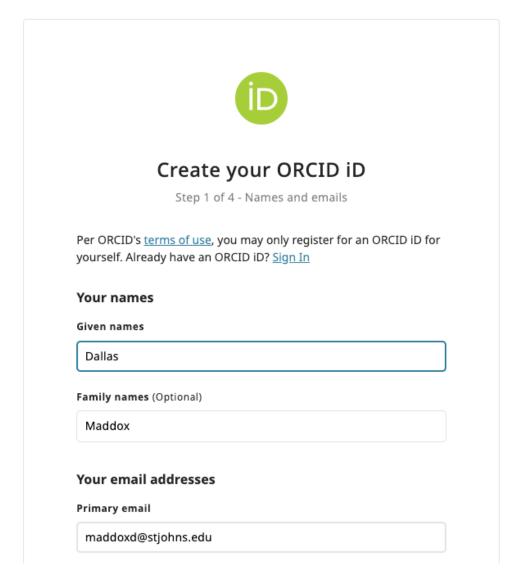




After you click this link, you will be asked to provide your name (IMPORTANT! Your name needs to match that which is the St. John's systems, i.e. Banner), email, etc...

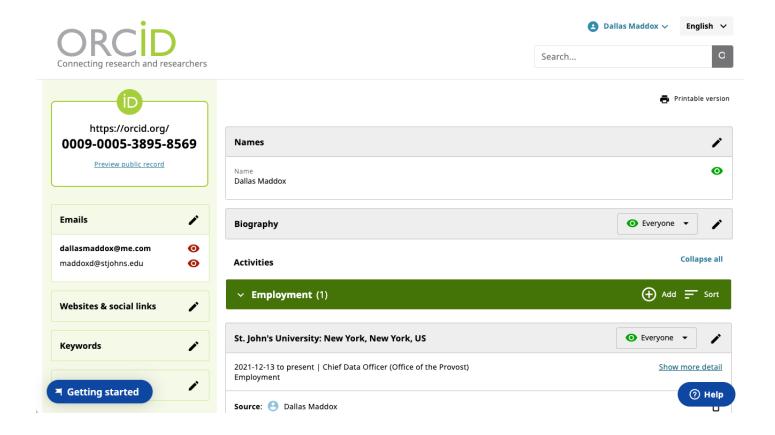


This will be the screen you provide your initial information:



After you have provided your information and created your ORCID account, you will navigate through the email verification process and then be sent to your "home page". Your home page will be similar to this:

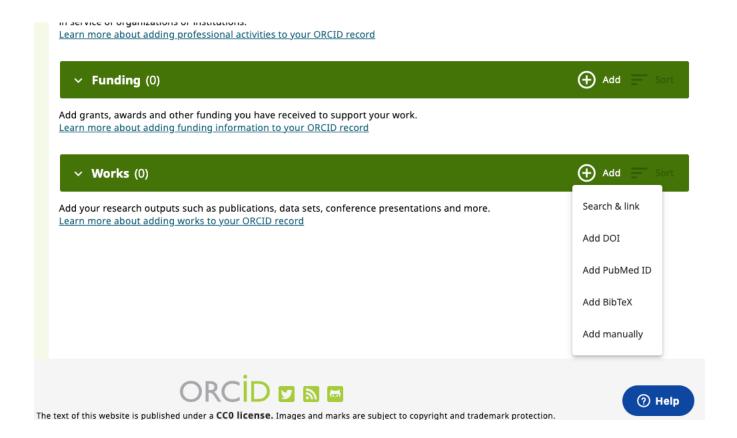




On this screen you will find your new ORC "ID" Number in the top left. That number is unique to you. THIS is the number you will need to participate in DYC.



While we are on this screen, you can edit/add any relevant information you would like, including your publications, by clicking "ADD" next to each category:

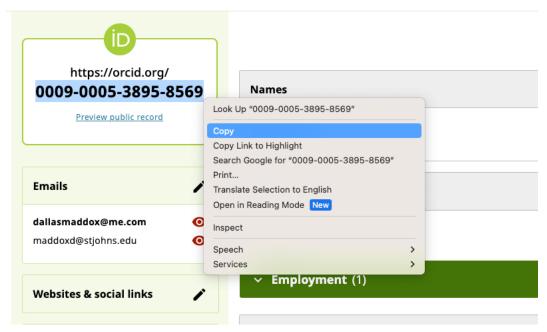


Here, I have clicked on "ADD" next to "Works". You can add all or any of your works here.



When completed, simply high light and copy your ORCID number:









Once copied to your "clipboard", navigate back to the DYC screen, and paste the number here:

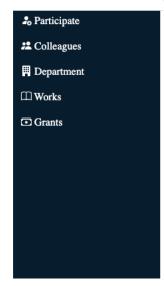


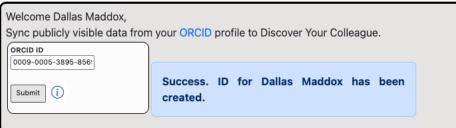
After you click submit (it may take 4-5 seconds), you will receive a blue "SUCCESS" box.













2. COLLEAGUES TAB

When logging into the DYC system (After completing the "GETTING STARTED" Section) your default home screen will be the "Colleagues" Tab:

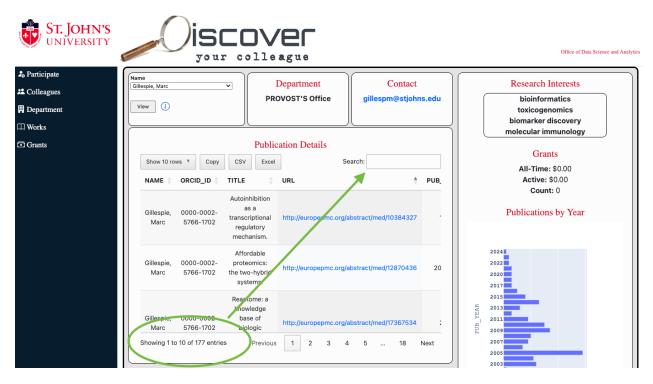


- Navigation Pane: On the far left, (in the dark shaded area) is the navigation pane. This will
 allow you to jump to each section of the DYC system. This pane will remain constant as you
 utilize the DYC platform.
- Colleague Selection: For those colleagues that have participated in the DYC system or are tagged in one of the universities public grants, their name will appear in the drop-down box. (If your name doesn't appear, you have not yet participated and can click participate in the navigation pane.). TIP: You can "jump" to the last names that start with "G", for example, by simply hitting "G" on your keyboard. Once you have selected a colleague, simply click on the "View" button.
- **Department & Contact:** This pane includes the selected Colleague's department along with a "clickable" email address (that will open an email to the individual upon clicking).
- Publication Details: All of the data shown in this section is from ORCID and is refreshed on a nightly basis. If you don't see one of your publications, or a publication has incorrect information, simply add it, or correct it on your ORCID profile by clicking the "+" symbol in the top right corner of the Works section (back on the ORCID website). Once you've added a new record, make sure the visibility of the record is set to "Everyone". The changes will be updated in Discover Your Colleague the following morning.



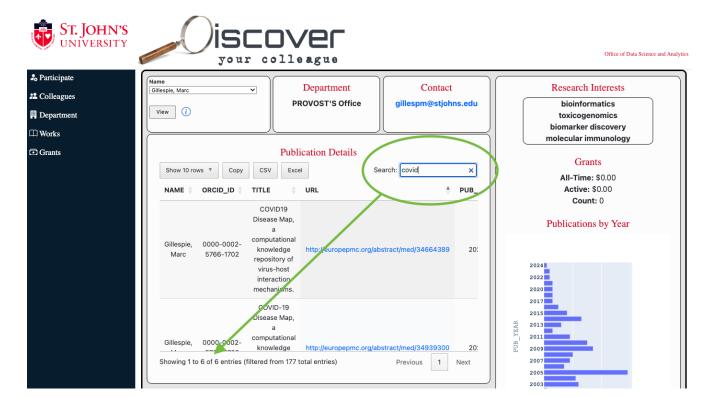
TIP! When using the "Publication" and "Grants" panes, there are some additional features:

1. If a particular colleague (or later, department) has a large number of publications:



...you can sort by title or publication date by clicking on the small up and down arrows next to the column header, or by searching on a topic:



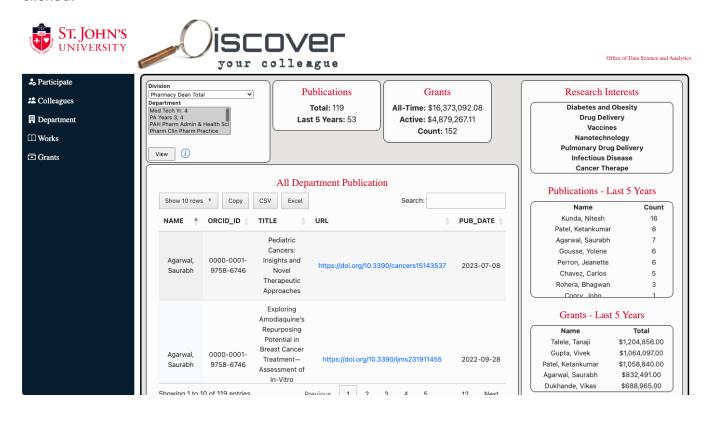


- Grant Detail: All of the data shown in this section is from Banner and is refreshed on a
 nightly basis. If you have a grant that is not being displayed, you can contact the office of
 Grants and Sponsored Research.
- Research Interests: These are pulled from the "Keywords" section in ORCID. You can add
 or edit your keywords by clicking the pencil icon next to the Keywords box on the left side of
 your profile page back on the ORCID website. Once you've added a new record, make sure
 the visibility of the record is set to "Everyone". The changes will be updated in Discover
 Your Colleague the following morning.



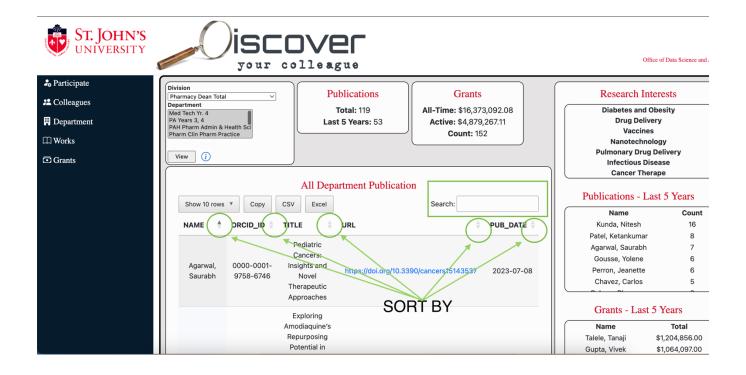
3. DEPARTMENT TAB

Selecting "Department" on the left navigation pane will provide you with the ability to select a Division and Department. NOTE: These divisions and departments are pulled directly from Banner. Development in a future DYC will include a more user-friendly Division/Department selection list. In this example, Pharmacy and all departments were selected, and "View" was clicked:



Navigation on the "Department" tab is similar to the other tabs. The Department and Grant tables are instantly searchable by typing your search topic into the search box (green square on the below graphic). You can also sort each column by clicking on the sort arrows by the column you'd like to sort (green circles). Last, you can export your results by copying them (to paste in a spreadsheet/document of your choice), or as a CSV or Excel file. SHOWN BELOW:





- **Division/Department:** Search your colleagues by their division and department. First, select a division from the dropdown menu. Then, select as many departments as you'd like from the Department field (select all departments by pressing ctrl+a). TIP: Again, the blue "I" link provides an in-screen help menu. Clicking "View" fills each pane with the selected criteria.
- Publications and Grants: These sections show the collective publications and grants from the selected department(s). Publications are provided by ORCID and is refreshed on a nightly basis. Grants are provided by Banner and also refreshed nightly. If you don't see one of your recent publications, or a publication has incorrect information, add or correct it on your ORCID profile by clicking the "+" symbol in the top right corner of the Works section. Once you've added a new record, make sure the visibility of the record is set to "Everyone". The changes will be updated in Discover Your Colleague the following morning. Likewise, if your associated grants information is not correct you can contact the office of Grants and Sponsored Research.
- Research Interests: Research interests are pulled from the "Keywords" section in ORCID and represent the combined Keywords from all colleagues from the selected department(s). You can add or edit your keywords by clicking the pencil icon next to the Keywords box on the left side of your profile page in ORCID. Once you've added a new record, make sure the visibility of the record is set to "Everyone". The changes will be updated in Discover Your Colleague the following morning.

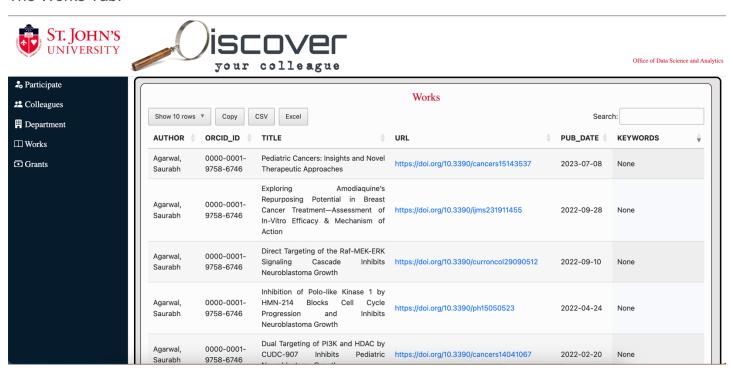


4. WORKS

The "WORKS" tab is a full collection of all participants' publications across the institution. As more colleagues participate and their publications are entered into DYC, this list will grow.

Populated by ORCID and updated nightly for those that are participating, and updated realtime for those that are just joining, the publications area easily searched, sorted and exportable.

The Works Tab:



The Search box (upper right) is universal to all columns in the table and searches as you type. For example, you can search on key word, title or author and the results will automatically populate.

Subsequently, you can also copy (to paste into a spreadsheet or document of your choice) or export as an Excel or CSV file. NOTE: Whatever is currently showing in any of the tables within DYC will be what is exported or copied. For example, if you search by author, and that particular author has 15 works, only those 15 works will be included in the export.



5. GRANTS

The Grants tab operates in the same exact manner as Works. As of this release, Grants are populated by Banner data and managed by the office of <u>Grants and Sponsored Research</u>. Future versions will expand on the functionality and availability of Grants.

The Grants Tab:



The Search box (upper right) is universal to all columns in the table and searches as you type. For example, I have searched for "effects" which has reduced the list of grants from 952 to four. You can search on Sponsor, Project or any keyword and the results will automatically populate.

Subsequently, you can also copy (to paste into a spreadsheet or document of your choice) or export as an Excel or CSV file. NOTE: Whatever is currently showing in any of the tables within DYC will be what is exported or copied. For example, in my search above for "effects" when I click on the copy, CSV or Excel export buttons, I am only exporting these four rows.



6. CONTACTS AND SUPPORT

<u>Institutional Effectiveness Home Page</u> – Service Organization

<u>Data Science and Analytics Team</u> – DYC Application Developers and Support Team

For requests, ideas on improvements and additional features or fixes, please fill out a "data request form" <u>HERE</u>, and choose "Other" as the type of request and type "DYC".

