

Scholars@Duke User's Guide

***Managing Scholars@Duke Profiles
March, 2016***

Contents

| | |
|---|-----------|
| Getting Started with Scholars@Duke | 1 |
| A Quick Introduction | 1 |
| Finding People | 1 |
| Editing Data in Profile Manager | 2 |
| Designating Delegates | 2 |
| Assign a Delegate | 2 |
| Remove a Delegate | 2 |
| Update the Name, Title, or Current Appointments and Affiliations. | 3 |
| Update Contact Information | 3 |
| Recent Edits | 3 |
| Upload, Edit, or Delete a Profile Picture | 3 |
| Add or Edit the Overview | 4 |
| Remove the Publications Graph | 4 |
| Add a Global Scholarship | 4 |
| Add a Web Page Link | 4 |
| Updating Education and Training Information | 5 |
| Manage “In the News” Items | 5 |
| Add Descriptive Subject Headings | 5 |
| Search Strategies | 6 |
| Managing Grants and Courses | 7 |
| Manage Grants Information | 7 |
| Manage Course Information | 7 |
| Adding or Editing Artistic Works and Non-Print Media | 8 |
| Add an Artistic Work | 8 |
| Edit the Description of the Work | 8 |
| Add Collaborators and Related Work | 8 |
| Add Artistic Work Events | 9 |
| Edit an Existing Artistic Work | 9 |
| Add a Pending Artistic Work | 10 |
| Adding Professional Activities | 11 |
| Add Awards & Honors | 11 |
| Add Outreach & Engaged Scholarship | 11 |
| Add Presentations & Appearances | 12 |
| Add Service to the Profession | 12 |
| Add Service to Duke University | 12 |
| Add Advising and Mentoring Activities | 13 |
| Managing Publications | 14 |
| Select Citation Display Style | 14 |
| Log in to Elements | 14 |
| Assign a Delegate to Manage your Publications | 14 |
| Manage Publications as a Delegate | 14 |
| Approve or Reject Pending Publications | 15 |
| Add or Delete Publications | 15 |
| Edit Publications | 16 |
| Remove Duplicate Publications | 16 |
| Set Favorite Publications | 16 |
| Upload a Publication to the Open Access Repository | 17 |
| Generating a Report | 18 |
| Creating a CV | 18 |

| | |
|--|-----------|
| Scholars@Duke Widgets | 19 |
| Add Profile Data to another Website | 19 |
| Setting up a Data Feed for an Organization | 20 |
| Combining Widgets | 21 |
| Creating Profiles for Academic Staff (Non-Faculty) and Students | 21 |
| Updating Profiles for Non-Faculty | 21 |

Getting Started with Scholars@Duke

This guide is written for Duke faculty members and delegates to explain how to make changes to a Scholars@Duke profile page.

A Quick Introduction

Scholars@Duke provides web profiles for all Duke regular-rank and non-regular rank faculty members. Profiles display data from institutional systems and other trusted sources. Some information can be edited or customized in Scholars@Duke. Other changes must be made in the originating system.

The home page offers options for browsing and exploring information, including by person, by Duke organization, or by Research type.



For information and videos about Scholars@Duke and Elements, click the Support link.

To find someone's profile, type their name or a research subject heading in the Search box.

News stories about faculty members are fed from the Duke Today website.

Research Events come from the Duke Events Calendar.

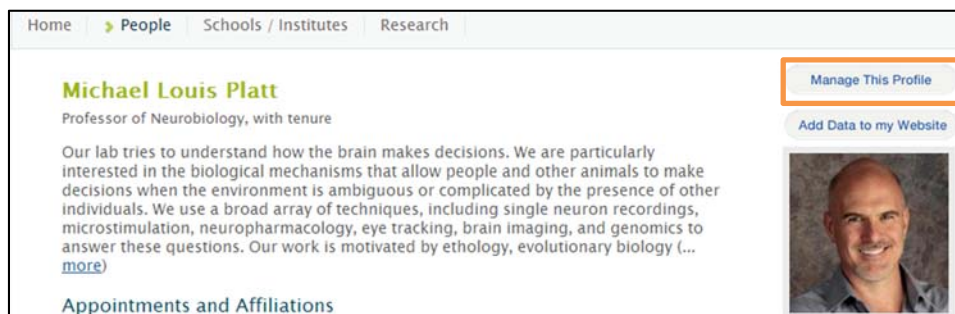
Finding People


To locate someone's profile in Scholars@Duke, you can do any of the following:

- Type their name in the Search box in the upper right corner. Click Search to find matches on that name. To restrict search results to people, click People in the Display Only box on the right.
- Browse by School or Institute. Click Schools/Institutes in the menu bar at the top of the home page, and click a school or institute to browse the sub-organizations and people in that organization.
- Browse by research topic. If you're looking for a person by research area, grant name or publication title, type that in the Search box. Use double quotes (such as "gun control") around phrases with two or more words. Click Search. On the search results page, you can restrict results depending on the type of information returned.

Editing Data in Profile Manager

Scholars@Duke profiles can be edited in Profile Manager. To use Profile Manager, find a profile and click the Manage This Profile button in the upper right. You have access to edit your own profile, but you'll need to a delegate to edit someone else's profile.



Note: Not all information can be edited directly in Profile Manager, but the information icons  tell you how to edit each data field. Some information must be edited in other systems, such as Duke@Work, dFac, SPS or Elements. See the following sections for more information.

Designating Delegates

Faculty members can give edit rights to anyone in the Duke directory. A delegate has rights to access and manage a faculty profile in Scholars@Duke. A delegate can have rights to many faculty profiles, but these rights are assigned individually by the faculty member, or by the power user for the organization.

Power users have been granted organizational access to manage profiles for all faculty that hold a primary appointment in their organization. Power users can also assign delegates to edit individual profiles.

Assign a Delegate

1. Locate the profile you want to manage by using the search bar located at the top right of Scholars@Duke.
2. From the profile page, click Manage This Profile.
You'll see the Profile Manager page.
3. From the Profile Manager page, click Manage Delegates, above the profile picture.
4. Click the Assign a New Delegate link.
5. Type the first and last name of the delegate into the search box.
6. After locating the user, click the plus sign next to the person's name. For more information, click the "i" icon to the right of their name.

After you assign a delegate, their name will be displayed on the right under Current Delegates.

Remove a Delegate

1. From the profile page, select Manage This Profile.
2. Click Manage Delegates.
You will see a list of current delegates listed on the right of the page.
3. Click the "X" located next to the name of the delegate you would like to remove.
After you remove a delegate, their name will not be listed on the right under Current Delegates.

Update the Name, Title, or Current Appointments and Affiliations.

The faculty member's name, title, and appointments and affiliations from dFac, Duke's faculty appointments system. The name displayed comes from the Professional Name in dFac, and the titles and organizations displayed can be edited by the department's local dFac user. For more help, contact the [power user](#) in your area. Please note that titles should match the titles on the faculty member's appointment letters or contracts.

Update Contact Information

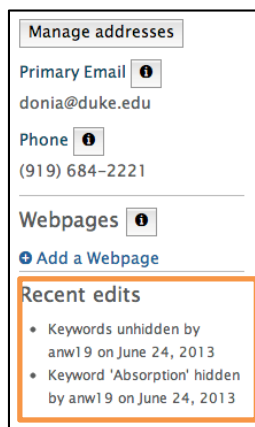
Scholars@Duke receives contact information from Duke@Work. Users will need to login to work.duke.edu to manage an address, email, or phone number in Scholars@Duke. The information provided in work.duke.edu will be automatically updated in the Scholars@Duke profile.

Addresses can be edited in Duke@Work. Go to the MyInfo tab and choose MyProfile. To edit the physical office location or the office phone, choose the External Mailing Address and Phone option. To edit the Duke PO box address, choose Interoffice Address.

To edit your email address or create an alias, go to [Duke@Work](#). Click My Profile, and then OIT Account Services. You can edit your email address here, or hide your email from displaying in public sites.

Recent Edits

Edits made in the Profile Manager are archived in the recent edits section, and will show the action performed, the NetID of the user who performed the actions, and the date of the edits.



Upload, Edit, or Delete a Profile Picture

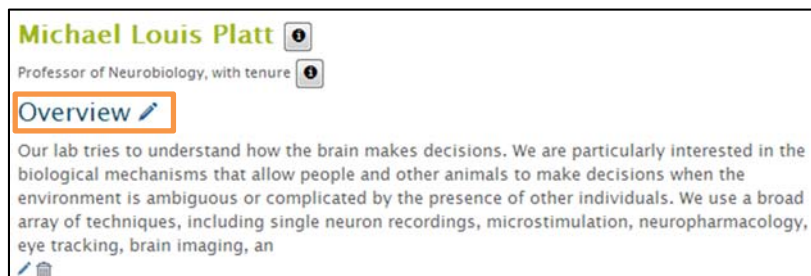
1. To change the picture, select the Photo plus (+) sign on the photo placeholder.
2. Click the Browse button. This opens a dialog box to let you select a photo file. The file size must be less than four megabytes in size (4,000 MB).
3. If the photo size is larger than 200 pixels X 200 pixels, the Crop Image page appears. Drag the crop box to the desired location on the original photo. Click Save Crop. The cropped image appears on the profile.
4. To recrop or delete the photo, click the Photo plus (+) on the photo:
 - To remove or replace this image, click the Delete Image button. Then click the Photo plus (+) sign to add another photo.
 - To change the cropping on the existing image, click the Recrop button. Move the crop box to the desired area on the photo, and click Save Crop.

Add or Edit the Overview

The overview paragraph displayed at the top of the Scholars@Duke profile can contain a short biographical statement, current research interests, or any description of scholarly activities.

- In the Profile Manager page, next to Overview, click the pencil icon to edit the paragraphs. Select Save Change before exiting.

Note: Pasting text directly from Microsoft Word is not recommended. Word's formatting codes are difficult for web content editors to interpret. Always copy from a Text editor when pasting text into content editors for web pages.



Remove the Publications Graph

The Publications graph on the profile page displays the number of Scholars@Duke publications by year for the previous ten years. This graph can be removed from a profile and restored later.

1. From the Profile Manager, click the Hide Pubs Graph.
2. To restore a publications graph that has been hidden, click Display Pubs Graph.

Add a Global Scholarship

Users can select one or more states or geographic regions to add to a profile if the faculty member's expertise, research or teaching involves particular states, countries or continents. This information is used by other systems at Duke, such as the global map at global.duke.edu.

1. In Profile Manager, select Add Global Scholarship.
2. Select the type of geographical focus from the Type menu:
 - Use Expertise if you have knowledge of that region's history, politics, economics or culture.
 - Use Research if you have conducted research in this location during the last three years.
 - Use Teaching if you have conducted teaching activities in this location during the last three years.
3. Select a country or continent from the Region menu.
4. Click the Add button to add the location and type of experience in this location.
5. Continue to add locations as needed. You can add as many locations per type as you wish. To remove a location, select the "X" located next to the region to be deleted.

Add a Web Page Link

To direct viewers to the faculty member's lab page, department page and other websites, add links to the profile. You can add as many links as you like, such as your Twitter feed, Facebook page, blog and other online content.

1. On the right side of the Profile Manager, under the contact information, click the Add a Web Page link.
2. Type or paste the web page address in the URL field, such as <http://labpage.biochem.duke.edu>.
3. Add a label for the link, such as "Lab page" and click the Add button to add the link.

Updating Education and Training Information

Scholars@Duke receives education and training information from dFac, Duke's faculty appointments system. Education and training information is entered by the departmental dFac user. To add a degree in dFac, the dFac user must have appropriate documentation such as a transcript or diploma. For more help, contact the [power user](#) in your area.

Manage "In the News" Items

Links to news stories about individual faculty members are loaded automatically on a weekly basis. News stories can be in Duke Today or in other media sources such as the New York Times or U.S. News & World Report. Stories from Duke Today are displayed without a source.

At most, five news items are loaded per week. If a faculty member has more than five news stories one week, then the five most recent news items will be loaded. You can refresh this section to load the five most recent news articles at any time.

To refresh or hide news items:

1. From the Profile Manager page, click Hide Data Items from the In the News section drop-down menu and choose "Select items to hide."
2. Click the check box next to the news items you want to hide, or use the Check All button. Click Hide selected to hide the checked items.
3. Click the Refresh button to load the five most recent news articles in which you have been tagged.

Add Descriptive Subject Headings

The Subject Headings section in Scholars@Duke has two purposes:

- To provide a quick summary of your current research which may not be reflected in grants, publications, artistic works and non-print media or other scholarship.
- To enable users to find Duke faculty members with similar research interests

Subject headings in Scholars@Duke can be added from three vocabularies, the MeSH (Medical Subject Headings) or LCSH (Library of Congress Subject Headings) as well as the custom Duke Subject Headings list. Subject headings from controlled vocabularies can be re-used for other analyses and purposes.

Text in subject headings are searched by Scholars@Duke users along with all other text on the profile. Searches are not restricted to subject headings terms.

To add subject headings:

1. From the Profile Manager page, find the Subject Headings section and click the Select Additional Subject Headings link.
2. On the Search for a Subject Headings page, type the term in the text box and click Find. You'll see two results lists: LOC subject headings and MeSH terms. Click the check boxes in front of the terms you want to add. Click the More Results link at the bottom to display more terms.
3. Click Add to add selected subject headings to your profile. You'll have the option to add more subject headings or view the ones you just added.
4. To search for more terms, click the Search Duke Subject Headings button.
5. On the Duke Subject Headings page, type the term in the text box and click Find. If the term appears in the Duke Subject Headings list, click the check box and click Add. If not, click the Request a Subject Heading button.
6. The Request Addition box appears. Type the term in the text box and click Request New Term. The Scholars team will add the term to your profile and contact you within five days.

Search for a Subject Heading ⓘ

Find Add

Please select from the following:

Library of Congress
searching: *heart murmur*

| LOC Subject Heading | |
|---|--|
| <input type="checkbox"/> Heart murmurs | |
| <input type="checkbox"/> Heart murmurs in children | |
| <input type="checkbox"/> Mitral Valve--Displacement | |

Check the box next to the term you want to add.

MeSH
searching: *heart murmur*

| MeSH Term | |
|--|--|
| <input type="checkbox"/> Heart Murmurs | |

Click here to search for more subject headings or request an addition to the Duke list.

Add Search Duke Subject Headings

Search Strategies

Subject headings may be broader than the particular term for which you are searching. If you cannot find the term, click the information icon to display a dialog box with links to the Library of Congress Subject Headings or the Medical Subject Headings websites, where you can more easily search for the term you need. If you need more help to find the right term, try these strategies:

- Ensure that you don't have misspellings or extra spaces in front of the search term. For example, the search will not find "infection" with an extra space at the beginning.
- Decompose the term into its individual concepts. Are you looking at a disease/condition? Do you want to know diagnosis / therapy / outcome / prognosis / risk factors, etc.? Is there a particular age group / ethnic group / gender? Do you want to know adverse effects / prevention & control / mortality / etiology? For example, your term might be listed as these subject headings: pregnant, women, screening, and streptococcal infections.
- Decide on words and/or phrases to describe the concepts. Consider all words/phrases that might be used to describe the concepts of your topic and search for those. These include synonyms, variations in spelling (US vs. UK), word endings (singular, plural), variant terminology (electrocardiograms, electrocardiography), and related terms (cataract extraction, intraocular lens implantation). The following are examples of equivalent subject headings: pregnant/pregnancy, screening/testing, women/woman/female.
- Search for each concept as a separate set rather than looking for one term that describes all concepts. Creating separate sets for each part of your topic allows you to modify your strategy. Use MeSH (Medical Subject Headings) or Library of Congress (Human Knowledge Subject Headings) whenever possible. MEDLINE, CANAL and other databases assign subject headings to articles to ensure that all articles on a particular topic have the same standardized terms. Authors often use variant terminology, spellings and acronyms in their articles such as heart attack for myocardial infarction.
- Combine your sets. Define the relationship between individual sets. Use the Boolean operators AND, OR and NOT. "ANDing" two sets together finds citations that contain both set concepts. "ORing" two sets finds citations that contain either one or both set concepts. Using "NOT" will retrieve citations that contain one set concept, but not the other.
- Refine your search, if necessary. You may need to broaden or narrow your search concepts. For example, you may use "staphylococcus aureus" or "staphylococcal skin infections."

Note: To enable viewers to search for you using more specific or customized terms, add them to the Overview paragraph.

Managing Grants and Courses

Information about grants and courses is loaded into Scholars@Duke from other Duke systems. Grants and courses cannot be edited in Scholars@Duke, but users can hide grants and courses from displaying on their profiles.

Manage Grants Information

The information in the “Selected Grants” section comes from Sponsored Projects System (SPS). Scholars@Duke displays only awarded grants, and only those grants in which the contract allows them to be listed publically. For more information, the power user in your area can direct you to the SPS security officer.

1. To hide specific grants, click Hide Data Items from the grants section drop-down menu. To hide all grants from a profile, select Hide Entire Section.
2. To continue removing specific grants choose Select Items to Hide from the drop-down menu. Checkboxes will appear next to each grant.
3. Select the grants you would like to hide.
4. Click Hide Selected from the bottom of the list.

Note: If you have a grant that isn’t displayed in Scholars@Duke, check with your SPS security officer or your grants office to make sure that the “Can Be Publicized?” box is set to Yes in SPS.

Manage Course Information

Scholars@Duke receives course information from ACES, and displays courses taught during the last three years. If there are courses incorrectly listed in a profile, the user should contact their power user, who will assist them in locating the appropriate contact.

1. To hide specific courses, click Hide Data Items from the courses drop-down menu. To hide all courses from a profile, select Hide Entire Section.
2. To continue removing specific courses, choose Select Items to Hide from the drop down menu. Checkboxes will appear next to each course.
3. Select the courses you would like to hide.
4. Click Hide Selected from the bottom of the list of courses.

Adding or Editing Artistic Works and Non-Print Media

The Artistic Works section enables faculty members to display their exhibitions, performances, documentaries, and other scholarly output that is not published for printing. These works can be linked to collaborations with other Duke faculty members and others. Users can add new artistic works, edit existing artistic works, or enhance works to which they have been added as a collaborator.

Add an Artistic Work

Click the Add Artistic Work button to enter information about a work that is not in Scholars. Try searching for the work before entering it in case it has been added by one of your collaborators. If so, you can ask them to add you as a collaborator so that the work is not listed in Scholars@Duke twice.

1. Add your role in the work by selecting a role from the drop-down menu. You can add multiple roles by clicking the “Add Another Role” button.
2. Add a Role Description to display an abstract or narrative about your role in this work. The Role Description appears when viewers click a role link. The Role Description should not describe the work itself but rather, your contribution to the work.
3. If you want to show your role as a featured role in a performance, click the Featured Role check box.

Next, add the description of the work.

Edit the Description of the Work

This section of Artistic Works is intended to provide a general overview of the work itself as it applies to all collaborators.

1. To describe the work itself, enter the title of the work, the exhibition, or of the series of performances, for example, “Recitals, 2013 – 2014.”
2. Select one or more artistic work types from the Types drop-down list.
3. Select a year, a month/year, or a month/day/year for the Creation Date by selecting a format and clicking in the date field. This displays a list of years, months and days. Select a year first, then the month, and then the day.
The Creation Date represents whatever date that you want to be associated with this work. This date may be used for reporting or visualizations in the future. Note that you can add dates associated with events in a separate area.
4. Describe the work in the Abstract field. The abstract is displayed on the work’s individual page and provides an overview of the work itself rather than details about contributors’ roles in the work.
5. Add Web Links to link to a web page about this work, such as a video on YouTube. Click the Add Web Link button and type address to the link in the Link URL field, and the label, such as “Performance on YouTube” in the Link Label field.

Next, designate collaborators and related works to link to other Scholars@Duke profiles.

Add Collaborators and Related Work

Follow these steps to link to Duke faculty collaborators and related work.

1. Click the Add Duke Faculty Artist/Collaborator field to link to a collaborator’s Scholars@Duke profile page. In the Search box, type the last name and click Search. Click the name in the search results to add this collaborator. Or click the Close box to exit without adding a collaborator.

Note: When you add a collaborator, the artistic work appears in the collaborator’s Profile Manager as a pending work. Collaborators must add their role and save their changes to be displayed as a Duke Faculty Artist/Collaborator. Collaborators have editing rights to the artistic work, including the title, the date, the type and the abstract, but cannot edit other collaborators’ roles.

2. To add collaborators who do not have a profile in Scholars@Duke, click the Add Artist/Collaborator button and type the name of the individual or organization with whom you collaborated on this work. These individuals will not be able to edit the artistic work.
3. Related Works provides a drop-down list of your artistic works in Scholars@Duke. Click the down arrow on the drop-down menu to show a list your works by titles, types and years. Click the Relate to Another Work button to add another work to which this work is related.

To describe performances or exhibitions related to this work, add Events.

Add Artistic Work Events

1. To add events such as performances, tours, exhibitions or appearances to this work, click the New Event button. You can add multiple events or describe a series as a single event.
2. Add the title of this event such as “Swan Lake on UNC TV” or “Premier.”
3. Type the name of the venue or location.
4. To add a year, a month/year, or a month/day/year, specify a start date. The end date is not required, but is available if you would like to display a date range.
5. Type an event description to provide details about the event or tour.
6. Click the New Event button to add another event.
7. If the work were commissioned by a person or an organization, click the Commissioned Work check box and add the name of the person or organization in the Commissioning Body field.
8. Click the Save Changes button to save the role, type, events and collaborators.

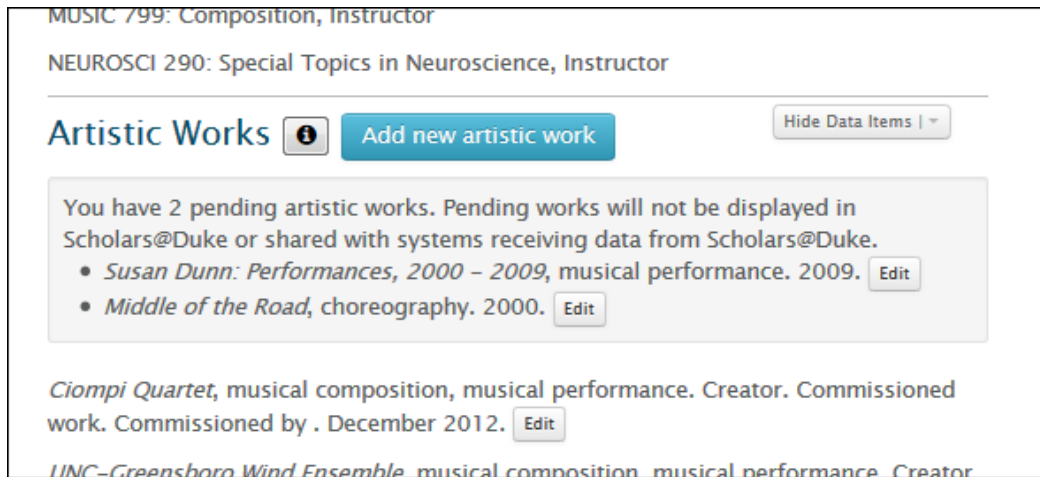
Edit an Existing Artistic Work

In the initial rollout of Scholars@Duke, individual artistic works were extracted from FDS, re-structured, and added to Scholars@Duke. These works can be edited by the artist or their delegate to add information or display the work differently. Additional information can be added by collaborators over time.

1. To edit an artistic work, click Manage This Profile and scroll down to the Artistic Works section. Click the Edit button next to the artistic work you want to edit (see previous section for specific information about using these fields):
 - Adding or changing your role in the work.
 - Editing anything in the description section, including the title, the type, the abstract, and web links.
 - Adding or editing events.
 - Adding or removing Duke faculty artists or other collaborators and related works.
2. Be sure to click the Save Changes button at the bottom when finished editing.

Add a Pending Artistic Work

If you have a Scholars@Duke profile and you have been added as a Duke faculty collaborator to an artistic work, the work will appear in Profile Manager as pending:



The screenshot shows the 'Artistic Works' section of a profile. At the top, it lists 'MUSIC 799: Composition, Instructor' and 'NEUROSCI 290: Special Topics in Neuroscience, Instructor'. Below this is the 'Artistic Works' header with an information icon, an 'Add new artistic work' button, and a 'Hide Data Items' dropdown menu. A grey box contains a message: 'You have 2 pending artistic works. Pending works will not be displayed in Scholars@Duke or shared with systems receiving data from Scholars@Duke.' Below the message are two entries: 'Susan Dunn: Performances, 2000 - 2009, musical performance. 2009.' and 'Middle of the Road, choreography. 2000.', each with an 'Edit' button. Below the grey box, there is a partially visible entry: 'Ciompi Quartet, musical composition, musical performance. Creator. Commissioned work. Commissioned by . December 2012.' with an 'Edit' button. At the bottom, there is a partially visible entry: 'UNC-Greensboro Wind Ensemble, musical composition, musical performance. Creator.'

To display pending works on your profile, you must add details about your role in the work:

1. Click the Edit button next to the pending work.
Information about the work appears, but without any role information.
2. Add your role by selecting a role from the drop-down menu. You can add multiple roles by clicking the “Add Another Role” button.
3. Add a Role Description to display an abstract or narrative about your role in this work. The Role Description appears on a page specifically about your role. The Role Description should not describe the work itself but rather, your contribution to the work.
4. To show your role as a featured role in a performance, click the Featured Role check box.
5. Click the Save Changes button at the bottom.

As a collaborator, you have editing rights to the description of the work itself, but you cannot edit anyone else’s role in the work. Collaborators cannot be removed from a work unless they remove themselves.

Adding Professional Activities

To add honorific awards, service, presentations, and students to your Scholars@Duke profile, use the Professional Activities section. **Note:** this information will be publically display unless you hide items or sections by clicking the Hide Data Items dropdown.

Add Awards & Honors

You can list any award or honor, from a departmental award to an internationally-known award.

1. In the Professional Activities section, select Awards & Honors from the dropdown and click Add Selected Activity Type. You'll see the Awards & Honors page.
2. Select the Award Type (required) to designate if the award was local, national or international.
3. Type the name of the award (required), for example, "Baldwin Scholars Unsung Heroine Award."
4. Specify the organization that awarded this honorific in the Awarded By field (required).
5. To add the award date, specify the start date (required) and end date. Each field lets you choose the month, day and year. To choose only the year or month and year, first click Year Only or Month/Year and then click the date field. Select the year first, and then the month and day, if applicable.
6. Add a description if you'd like to display more information about this honor or award. This information appears when users click the link to the award or honor on your profile page.
7. Click the Save This Award button, or click the profile name to exit without saving an award.

Add Outreach & Engaged Scholarship

The Outreach & Engaged Scholarship section captures civic engagement, community service, and other scholarship that applies Duke's academic resources towards solving public problems. Outreach & Engaged Scholarship includes service learning and community-based research projects.

1. In the Professional Activities section, select Outreach & Engaged Scholarship from the dropdown and click Add Selected Activity Type. You'll see the Outreach & Engaged Scholarship page.
2. Select the Service Type (required) to describe the general kind of service.
3. Add the Service Name or Event Series, , if the service was part of a larger project such as a publicity campaign.
4. Specify the Host Organization, which could be the sponsor of the service or research project, or the recipient of the service activity.
5. If applicable, add the venue and/or the location, such as "Northside Elementary School, Durham."
6. Optionally, add the Geographic Region, the state, country or continent in which the outreach or engaged scholarship occurred.
7. To add the award date, first click Year Only or Month/Year if you don't want to add the month, day and year. Then click the date field. Select the year first, and then the month and day, if applicable.
For ongoing service activities, leave the end date blank or add a future end date.
8. Add a description if you'd like to display more information about this service activity. This information is displayed on the page that appears when users click the link to this service activity.
9. Click the Save This Activity button, or click the profile name to exit without saving this information.

Add Presentations & Appearances

Presentations & Appearances includes conference presentations, invited talks, lectures and interviews in which the faculty member is interviewed by someone. Interviews conducted by the faculty member, as well as published conference output such as proceedings and conference papers, are considered publications and should be entered into Elements.

1. In the Professional Activities section, select Presentations & Appearances from the dropdown and click Add Selected Activity Type. You'll see the Presentations & Appearances page.
2. Select the Service Type (required) to describe the kind of presentation, such as invited lecture.
3. Add the Name of Talk (required).
4. If applicable, add the event or event series name, such as "The State of Things."
5. Specify the Host Organization, such as "Modern Language Association."
6. Add the Venue and Location, for example, "Carnegie Hall, New York, NY."
For ongoing service activities, leave the end date blank or add a future end date.
7. To add the presentation dates, first click Year Only or Month/Year if you don't want to add the month, day and year. Then click the date field. Select the year first, and then the month and day, if applicable.
8. Add a description if you'd like to add information about this presentation. This information appears when users click the link to this presentation on your profile page.
9. Click the Save This Presentation button, or click the profile name to exit without saving this activity.

Add Service to the Profession

Service includes committee work, editorial work, events, and professional development that occurs outside of Duke and/or benefits organizations other than Duke.

1. In the Professional Activities section, select Service to the Profession from the dropdown and click Add Selected Activity Type. You'll see the Service to the Profession page.
2. Select the Service Type (required) to describe the kind of type of activity, such as "Editorial Activities."
3. Type the title of your contribution in the Role or Office Held field, for example, "Board Member."
4. Enter the Service or Event Series Name, for example, "Fall Southeast Conference."
5. Specify the Host Organization, such as "American Historical Society."
6. Add the Venue and Location, for example, "Washington, DC."
7. To add the service date, first click Year Only or Month/Year if you don't want to add the month, day and year. Then click the date field. Select the year first, and then the month and day, if applicable.
For ongoing service activities, leave the end date blank or add a future end date.
8. Add a description if you'd like to display more information about this service activity. This information appears when users click the link to this service activity on your profile page.
9. Click the Save This Activity button, or click the profile name to exit without saving this activity.

Add Service to Duke University

Service includes committee work, editorial work, events, and professional development that is focused on Duke.

1. In the Professional Activities section, select Service to Duke University from the dropdown and click Add Selected Activity Type. You'll see the Presentations & Appearances page.
2. Select the Service Type (required) to describe the kind of type of activity.

Note: when you select Committee Service, the Committee Name and Committee Type fields appear, and both are required fields. Committee Name is a type-ahead field and matches previous entries. The Committee Type field specifies the level of the committee, whether it's university, department, and so on.

3. Type the title of your contribution in the Role or Office Held field, for example, "Board Member."
4. Enter the Service or Event Series Name, for example, "Fall Publicity Campaign."
5. Specify the Host Organization, such as "Durham County Literacy Council."
6. Add the Venue and Location, for example, "Durham, NC."
7. To add the service date, first click Year Only or Month/Year if you don't want to add the month, day and year. Then click the date field. Select the year first, and then the month and day, if applicable.
For ongoing service activities, leave the end date blank or add a future end date.
8. Add a description if you'd like to display more information about this service activity. This information appears when users click the link to this service activity on your profile page.
9. Click the Save This Activity button, or click the profile name to exit without saving this activity.

Add Advising and Mentoring Activities

The Advising section is designed to display information about previous and current advisees. The Mentoring section lets you describe how you're currently mentoring people now and/or display your willingness to mentor others at various educational levels.

To add mentoring information:

- You can describe your mentoring activities or your opportunities to mentor others using the Mentoring Overview. Click the pencil icon to display the editor where you can type or paste information from another document. This editor enables you to format information, like add bullets, links, or bullets.
- To specify your availability for advising/mentoring, click the Add Availability link, and then select the education level at which you are willing to mentor or advise. This information may be displayed on other Duke websites to help people find advisors and mentors.

To add advisees:

1. In the Advising/Mentoring section, click the Add Advisee button. You'll see the Advisee page.
2. Select the Advisee Type (required), meaning the educational level of the advisee.
3. Enter the name of the Advisee. **Note:** this information will be displayed publically unless you hide it.
4. For advisees that are no longer in your department, specify their current position.
5. To enter the date range, first click Year Only or Month/Year if you don't want to add the month, day and year. Then click the date field. Select the year first, and then the month and day, if applicable.
For ongoing advising relationships, leave the end date blank or add a future end date.
6. Add a description if you'd like to display more information about this advisee. This information appears when users click the link to this service activity on your profile page.
7. Click the Save This Activity button, or click the profile name to exit without saving this activity.

Managing Publications

Publications in Scholars@Duke are loaded nightly from Elements, the publication workflow tool implemented by Duke Libraries. To add, edit, or delete publications from Scholars@Duke profiles, users can login to Elements using their Duke NetID. For more detailed information about using Elements, please refer to the ScholarWorks website at scholarworks.duke.edu/elements/help/managing-your-publications/.

Note: Elements harvests publications from many online bibliographic databases, including REACH NC, which is the statewide database of research expertise at <http://reachnc.org>. Most of Duke's regular-rank faculty members have a profile in REACH NC and have publications that displayed in that profile. Publications from REACH NC are automatically designated as approved publications in Elements. All approved publications load directly into Scholars@Duke.

Select Citation Display Style

Publication citations in Scholars@Duke are displayed in Chicago style format. Users can change the style of their publications to APA, MLA (Modern Language Association), or ICMJE (International Committee of Medical Journal Editors).


To change the style in which publications are displayed:

1. After clicking "Manage This Profile," scroll down to the Selected Publications section.
2. In the dropdown that appears under the Selected Publications heading, select your preferred citation style.
3. Click the Change Preferred Citation Style button.

Log in to Elements

To edit your publications, you'll need to log in to Element. To do that, you can either:

- Go to elements.duke.edu OR
- After clicking "Manage This Profile," scroll down to the Publications section and click the Manage Publications button. Elements will appear in a new tab in your browser.



Assign a Delegate to Manage your Publications

1. In Elements, go to account settings, located in the top right menu bar.
2. Under add delegate type in the last name of the person you would like to assign as a delegate.
3. The system will search any Duke affiliate that has a NetID.
4. Locate the name, and then click the green plus (+) sign located next to the name.
5. Click Save.

Manage Publications as a Delegate

1. In Elements, click the home tab (the tab to the far left, with the house icon).
2. Under My Delegation, you will see a list of individuals who have given you rights to act as a delegate on their behalf.
3. Click the name of the person you would like to represent.
4. Select "Impersonate this User" from the top right of the profile page.
On the top left menu you should now see the name of the person you are impersonating next to your name. It will confirm that you are impersonating another user.

Any actions that you take will be applied to this profile. This includes any actions that you take under account settings.

- To add additional delegates to manage this profile you can follow the directions in the above section titled “Assign a Delegate to Manage your Publications”.

Any additional actions should be explained in the directions below or in the Elements Help Documentation. Click “help” from the top right menu bar to access the Getting Started Guide or any other needed help documents.

Approve or Reject Pending Publications

- In Elements, click the home tab.
- Click “My Publications”.
- Click the “Pending” tab.
- To approve a pending publication, click the green circle with a checkmark to the right of the publication title.
- To reject a publication, select the red circle marked with an “X” located to the right of the publication title.

Add or Delete Publications

- In Elements, click the home tab.
- Click My Publications.
- To add a new publication, select add a new publication button from the top right menu. You can also add new publications by selecting the plus (+) sign that is located next to each publication type listed under My Publications.

| My Publications | | | | |
|--|--------|-----------|------------|----------|
| | Author | Editor | Translator | |
| Journals | + | 16 | 0 | 0 |
| Other articles | + | 37 | 2 | 0 |
| Books | + | 2 | 4 | 0 |
| Book sections | + | 13 | 0 | 1 |
| Scholarly editions | + | 1 | 1 | 0 |
| Conferences | + | 1 | 0 | 0 |
| Theses / Dissertations | + | 2 | 0 | 0 |
| Reports | + | 0 | 0 | 0 |
| Datasets | + | 0 | 0 | 0 |
| Digital publications | + | 0 | 0 | 0 |
| Software | + | 0 | 0 | 0 |
| TOTAL | | 72 | 7 | 1 |

Note: At this time, only the following types of publications in Elements are displayed in Scholars@Duke. To further designate publication types within these broad categories, select a subtype. For example, journal articles and other articles can be designated as reviews, editorials, and so on.

- Journals and journal articles
- Books
- Book sections
- Conference papers proceedings
- Other articles
- Scholarly editions
- Theses and dissertations
- Datasets
- Digital publications
- Software

Edit Publications

You can edit citations that have been loaded from a bibliographic database such as PubMed. Note that editing a citation changes its Source to Manual.

1. Login to elements.duke.edu with your NetID and password.
2. Click the home tab.
3. Click the link of the publication type that you would like to edit.
4. Review the list of publications and click the hyperlinked title of the publication you want to edit.
5. Click the Add Manual Record button. Make edits in the fields that need corrections.
6. Click Save.

For more information about editing publications in Elements, please refer to the ScholarWorks website at scholarworks.duke.edu/elements/help/managing-your-publications/.

Remove Duplicate Publications

To remove duplicate listings you will add duplicate publications to a workspace, and then join the duplicates into one publication.

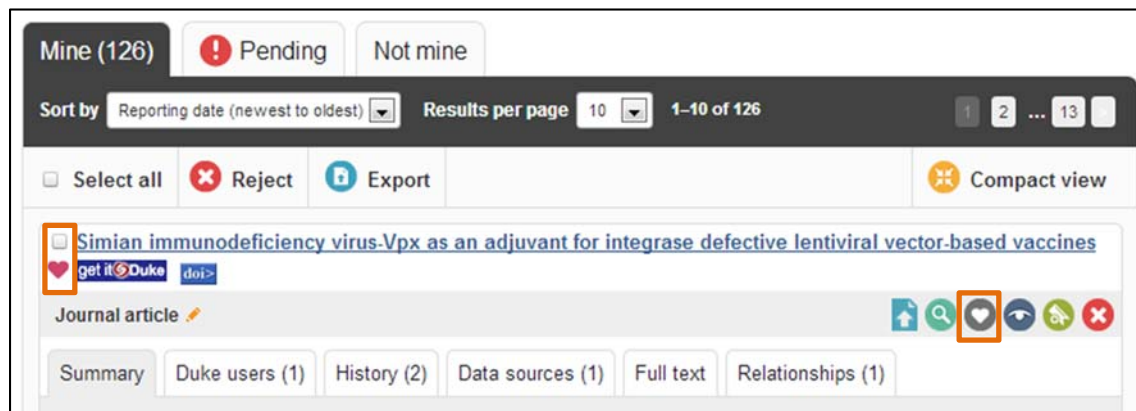
1. From the list of publications, click the green circle with a wheelbarrow icon to the right of the publication title.
2. This will add the item to your workspace.
3. Add all the duplicate publications to the workspace.
4. Go to the workspace by clicking the icon to the left of the mailbox icon on the top right menu bar. The total number of items you deposited into the workspace should be listed in the icon.
5. Select the checkboxes to the left of the items you want to join. Select Join.

Set Favorite Publications

In Elements, you can designate publications as favorites. Your favorite publications will be reflected in data feed from Scholars@Duke that display favorite publications, such as department websites in the School of Medicine.

1. Proceed to the profile you want to manage.
2. Locate the article that you would like to favorite.
3. Click the heart icon that is located to the right of the article title.

You will see a heart icon to the left of the article title, and this publication will pass through to Duke School of Medicine websites that are receiving data from the Scholars@Duke.

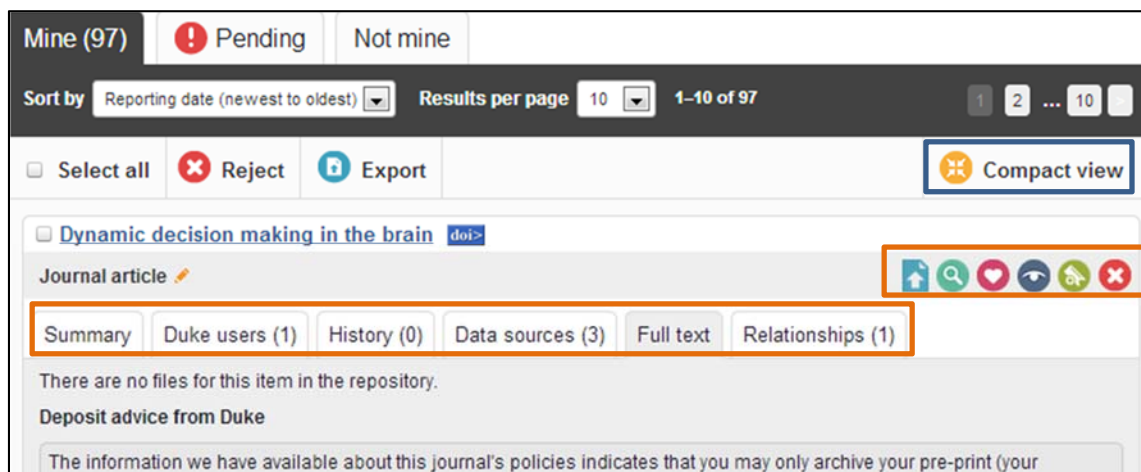


Upload a Publication to the Open Access Repository

In order to make a publication PDF available to Scholars@Duke users, you will can upload a PDF file to the Duke Libraries Open Access Repository. Uploaded publications display a “Open Access” link next to the citation in Scholars, which enables users to obtain the PDF file immediately.

Note that Elements can display publisher copyright status for your publications based on the SHERPA/RoMEO database of publisher’s policies regarding the archiving of journal articles. Please read the “Deposit Advice from Duke” before uploading a full-text publication.

1. Locate the publication you want to manage.



2. Locate the article you would like to affiliate with a full text PDF.
3. Click on the title of the article. (To receive advice from Duke regarding the publisher’s policy select the detailed view button, and then click the “Full text” tab. You will then see deposit advice from Duke and the option to “upload new file for this publication”. You can upload a PDF using this option.)
4. Under the section “DukeSpace” click the “Upload new file” button.
5. Under the section “Upload a file” click the “Choose file” button.
6. Locate your PDF, then click upload.
7. In the section above titled “Files in DukeSpace” you will see a button labeled “Grant,” Click this button to grant rights to the repository to provide full text access to your article.

Generating a Report

Scholars@Duke provides a report that displays activities and outputs by year. You can enter a range of dates to show only the information that was produced during that range.

To display the report:

1. Open Profile Manager by clicking Manage This Profile in the upper right corner of a profile page.
2. In Profile Manager, click Generate Report.
The report window appears.
3. To remove sections, un-click the check box for a section at the top. For example, to create a current publications list, you can deselect all sections except publications.
4. Add a start date and an end date to show only the information produced during a date range, for example “2014-01-10 to 2014-12-31” to display the information produced during the year 2014.
Note: output and activities without dates appear in all date selections.
5. To change the format of your publication citations, select your preferred style, such as MLA, from the drop-down at the top of the report. Your publication citations will be displayed in your preferred style.

To copy the report:

- Click the Select all button and select Copy from your browser’s menu. Then paste the text into a Word document, an email, or other application window.

To display hidden information in your Scholars report:

1. Unhide the section or items that you want to include in your Scholars report.
2. Generate the report, and copy the text to another document.
3. Re-hide the information that you don’t want to display on your Scholars profile.

Creating a CV

The “Download CV” feature displays your Scholars information in CV format, opened in a Microsoft Word window for quick and easy editing.

To create a CV:

1. In Profile Manager, click the Download CV button.
A Word file called “cv.docx.zip” is saved in your Downloads folder.
2. Open the file in Word to edit and save your CV with a different filename.

To make your CV available publically, you can store your CV in your Duke Box location and create a webpage link on your Scholars page. For more about how to use Duke Box, see box.duke.edu.

Note: More data fields to support a complete CV are planned for summer 2016.

Scholars@Duke Widgets

Widgets enable users to embed lists of publications, courses, and other Scholars@Duke information in a web page such as a lab or personal page. Widgets provide a dynamic feed to the other page so that whenever the associated information is updated in Scholars@Duke, it is updated in the web page automatically. Any member of the Duke community with a NetID can access and create customized widgets to obtain data for a faculty member or an organization.

Scholars@Duke provides two kinds of widgets:

- Individual profile widgets create feeds of faculty data from one person's web profile.
- Organizational widgets create feeds of all faculty members in an organization.

Add Profile Data to another Website

Brennan, Richard Gerald's Widgets

Collection to Display: ?

Number of items to return: ?

Display Format: ? Detailed Abbreviated

Styling: ? Styled Unstyled

Your Embed Code:

```
<script type="text/javascript"
src="https://scholars.duke.edu/widgets/api/v0.9/people/publications/5.js?
uri=https://scholars.duke.edu/individual/per4732592&formatting=
detailed&style=yes"> </script>
```

After making your selection, copy and paste the embed code above. The code changes based on your selection.

Copy to Clipboard

Advanced

To add an individual's Scholars@Duke profile data to another web page, follow these steps.

1. To add data to a website click the "Add Data to my Website" button located above the profile picture.
2. Select your refinements using the menu provided.

- Collections

From the drop-down list next to Collection to Display, select Publications, Courses, Grants, Appointments, Addresses, Overview, or Contact. The Preview panel on the right shows how the list will look based on the current selections.

- Items

Select the number of items the display should provide from the drop-down list. Users can display the 5, 10, or 15 most recent items, or all items. The Preview panel displays the list based on the current selections.

- Display Format

Select Abbreviated to display a shorter version of the publications. Select Detailed to display the full publication. The Preview panel shows how the items will look in either display format. This option is currently available only for publications.

- Styling

Choose Styled to use embedded styles, or choose Unstyled to use the styles on your web page. The Unstyled selection displays items in a bulleted list. The Preview panel displays both options.

- Advanced

The Advanced button enables web administrators to format the data in JSONP, HTML, or JavaScript. Selecting these options opens a new window that displays the information in the selected format.

All data for one faculty member provides a feed of all the data on a profile page in JSONP or JSON.

3. Select the text located in the embed code box and click Copy to Clipboard.

4. Paste the embed code in your website.

Note: Some web editors or content management systems may require additional modules or settings to enable the widgets code to work properly. If you are using a Duke-administered content management system, contact the IT group that administers the CMS if you need more help with the widgets.

Note: Some web editors or content management systems may require additional modules or settings to enable the widgets code to work properly. If you are using a Duke-administered content management system, contact the IT group that administers the CMS if you need more help with the widgets.

Setting up a Data Feed for an Organization

Scholars@Duke widgets are available for organizations as well as for individuals. Currently, only People or Grants data are available in the organization's widgets but more features are planned for development in the near future, including contact information, courses, and publications.

Biochemistry's Widgets

Collection to Display: ? People

Number of items to return: ? 5

Styling: ? Styled Unstyled

Your Embed Code:

```
<script type="text/javascript" src="https://scholars.duke.edu/widgets/api/v0.9/organizations/people/5.js?uri=https://scholars.duke.edu/individual/org50317277&formatting=detailed&style=yes"> </script>
```

After making your selection, copy and paste the embed code above. The code changes based on your selection.

[Copy to Clipboard](#)

[Advanced](#)

5 People in detailed format styled

- Been, Michael Douglas (Professor of Biochemistry) [More info](#)
- Beese, Lorena Sue (Professor of Biochemistry) [More info](#)
- Beese, Lorena Sue (James B. Duke Professor of Medicine) [More info](#)
- Bennett, George Vann (Professor of Biochemistry) [More info](#)
- Bennett, George Vann (George B. Geller Professor for Research in Molecular Biology in the School of Medicine) [More info](#)

To add an organization's profile data to another web page, follow these steps.

1. To add data to a website click the "Add Data to my Website" button located above the profile picture.
2. Select your refinements using the menu provided. Review the preview panel to ensure correct formatting is achieved.
3. Select the text located in the embed code box and click Copy to Clipboard.
4. Paste the embed code in your website.

Combining Widgets

Programmers can combine widgets to create a feed of Scholars data for everyone in an organization. Using the list of people in the organizational feed, programmers can use the individual data feed by looping through the list of people.

Creating Profiles for Academic Staff (Non-Faculty) and Students

Scholars@Duke enables profiles to be created for staff and students who want to display their scholarly work, such as peer-reviewed publications, grants, or research interests. To confirm the person's affiliation with an academic department, institute or center, only Power Users can create a non-faculty profile for an individual.

To create a profile for a staff member or student, the Power User can follow these steps:

1. On the Scholars@Duke home page, click the Manage Scholars Data link in the bottom right corner.
2. In the Search by Name field, type the name of the person for whom you are creating a profile and click the Search button.
3. In the Search Results, select the name of the person for whom you are creating a profile. If you aren't sure it's the right person, click the "i" icon for directory information.
 - If the person already has a profile, you'll see an Edit Profile link by their name. You can add their profile to your department regardless; this will not create a duplicate profile but will associate their profile with both organizations.
 - If the person is a faculty member, you won't be able to create a non-faculty profile for them.
4. Click the drop-down arrow and select the correct organization and then click the Add button.

Clicking the Add button creates the profile and displays the person on the Manage Scholars Data page. To edit or deactivate the profile, click the pencil icon next to the name.

Once the profile has been created, the person can log into it using their NetID and password.

Updating Profiles for Non-Faculty

Any information that can be edited in Scholars, such as the Overview, Global Scholarship, Subject Headings, and so on, can be edited on non-faculty profiles in the same way.

However, the automated content on non-faculty profiles differ from faculty profiles in the following ways:

- Names and Titles are fed from the Enterprise Directory. Titles must be edited in iForms and names can be edited in OIT's self-service module (oit.duke.edu/self-service)
- Courses taught by non-faculty are not currently being fed from PeopleSoft; however, the Scholars team is planning to change that in the future.
- Publications can be entered in Elements for non-faculty; all Duke employees have an account in Elements. However, publication searches are not activated automatically for non-faculty, so if you'd like Elements to search any publication sources for you, go to Elements.duke.edu, login and on the home page, click the "search settings" link. If you have questions, click the Help button in the upper left corner. If you can't find what you need, contact elements@duke.edu.