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1. Introduction

UNIWeb is a research productivity software designed to increase the productivity of both staff and faculty members at research institutions. This enterprise level solution provides a secure and private network for researchers to connect, collaborate and compile their academic information.

UNIWeb networks are overseen and managed by their administrators. As an administrator, you have the ability to add, edit and delete members, to control access to the network and to manage research themes and academic units. You also have the ability to collect and compile metrics for your faculties, departments and institution.

This guide will provide you with an overview of UNIWeb's administration capabilities as well as detailed steps for conducting typical administration tasks.

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

1.1. Administration Panel

The admin panel has six main sections (see Figure 1). These are:

1. **Members:** Edit member information. Add or remove members.
2. **Research Themes:** Approve research theme proposals. Edit the hierarchy of research themes.
3. **Academic Metrics:** Visualize statistical information about members. Create lists and reports.
4. **Academic Units:** Edit the profile of academic units.
5. **Access Control:** Manage access roles and control member permissions.
6. **API Access:** Create and edit API client credentials.

If you do not see all these panels, it means that your permissions don't give you access to all of these areas. UNIWeb shows panels based on what the administrator has been granted permissions to access.

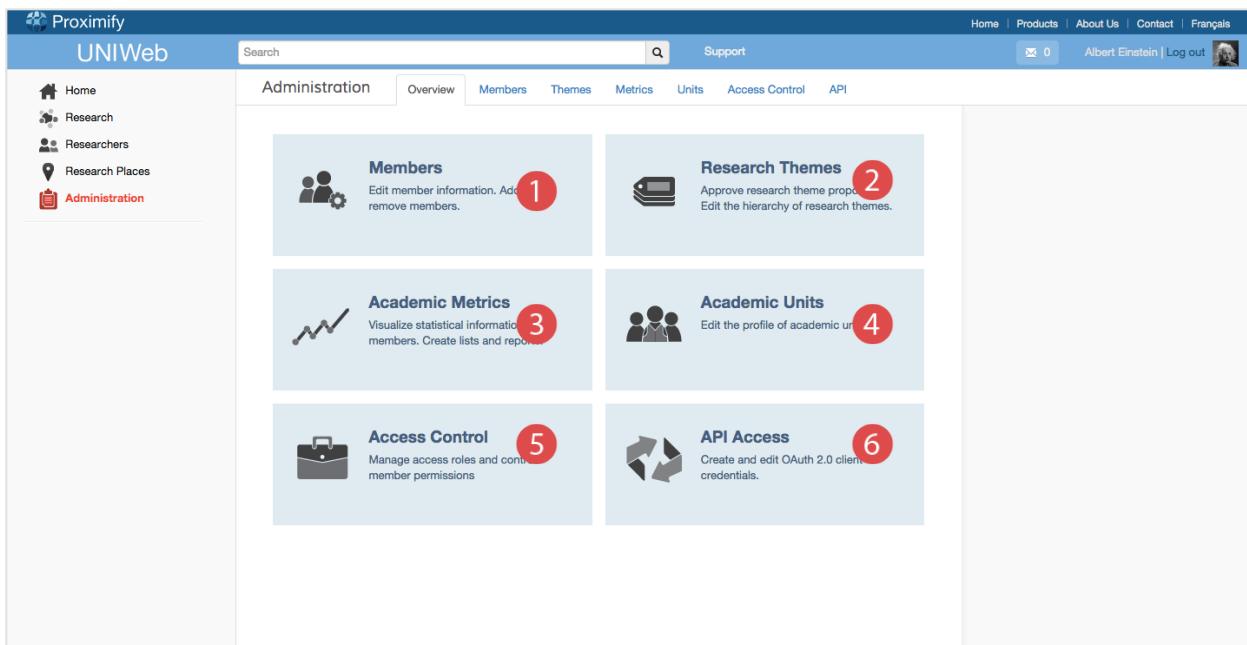


Figure 1 Administration Panel

2. Members

The Members section of UNIWeb provides a full list of your network's users as well as management and communication options.

If you want to download reports, send password resets or other notifications, or add new members, you would perform those tasks through the Members panel.

The Members list, like many Administration pages, has helpful search and filtering options at the top of the page (see ① in Figure 2). If you begin typing a user's last name, UNIWeb's search will narrow down your list of members.

The screenshot shows the UNIWeb Members page. At the top, there's a navigation bar with links for Home, Products, About Us, Contact, and Français. On the right, it shows a message count of 0, a user profile for Albert Einstein, and a Log out link. Below the navigation is a secondary header with tabs: Administration, Overview, Members (which is selected), Themes, Metrics, Units, Access Control, and API. A search bar with placeholder 'Search' and a magnifying glass icon is positioned above the main content area. The main content area contains a table of member profiles. The columns include Last names, Academic Titles (with dropdown menus for 'Academic Titles' and 'Academic Units'), and a checkbox column. A red circle with the number 1 is placed over the search/filter area. To the right of the table is a sidebar with sections: ACCOUNT CREATION (Add a new member, Add members from a file, Select unactivated), SEND EMAIL (Account activation, Password reset, Generic message, Check send status), and TOOLS (Download CVs, Delete selected). Red circles with numbers 2, 3, and 4 point to these sections respectively.

Figure 2 Members Page Overview ① Search and filter by academic title and academic unit ② Account creation options ③ Email options ④ Additional tools

2.1. Add Members Manually

To manually add a new member to your UNIWeb network, select the Add a New Member option from the right-hand menu (see ② in Figure 2) and complete the popup form (see Figure 3).

The pop-up window has a title bar 'Add a new member'. Inside, there are several input fields with validation requirements indicated by asterisks (*): First Name, Middle Name, Last Name, Account Type, Position Title, Academic Unit, Email, Username, Telephone, Homepage, and Office. Each field has a corresponding text input box. Below the fields are two buttons: 'Save' (in blue) and 'Cancel'.

Figure 3 The pop-up window for adding new members. Items marked with an asterisk are mandatory

When you select a title for a user, this is not their professional title but rather their account type within UNIWeb. This affects several areas of the application.

First, a user's title will determine the sections that appear on their public profile. For example, a professor will have a section to list the grad students that he or she supervises, whereas a student will have a section to list their supervisor.

Second, titles are used throughout UNIWeb for filtering data. For example, narrowing down results in Research Places to only display doctoral students.

2.1.1. Account Types

Account types simply categorize the nature of the user. Professors will have different needs than students or lecturers, and the type of profile will be different depending on the account type. The account type also has no bearing on the users actual title. A person with an account type "Professor" can be anything from an assistant professor to a full professor.

The list of available account types is listed below:

- Administrator
- Alumnus
- Doctoral Student
- Industrial Partner
- Invited Professor
- Lecturer
- Librarian
- Master's student
- Postdoctoral Fellow
- Professor
- Research Assistant
- Research Associate
- Researcher
- Teaching associate
- Webmaster

2.1.2. Username

If Username isn't filled in when creating a new member, the user's email is used as their username instead. This cannot be changed later.

2.1.3. Academic Unit

When creating a user's account, a primary academic affiliation must be included. Administrators can also add members to secondary units, called cross-appointments, at a later time. See section 5.6 about adding members to multiple units.

Note: Adding a new member does not automatically invite them to join the network. To learn more about sending invitation emails, please see section 2.3.

2.2. Add Members from an Excel Document

Many institutions keep documented lists of their members. Adding members by uploading an Excel document allows you to leverage your existing data.

When you import members from an Excel document, UNIWeb scans the document and only adds members who do not yet exist in the network. This allows you to maintain a single file, which you can update outside of UNIWeb, and upload numerous times without the risk of creating duplicate accounts.

When you select the Add Members from a File option from the right-hand menu (see ② in Figure 2), you are able to download a template document. This supplies an outline of the necessary data that must be provided for new members.

The following lists all of the fields that can be used when creating a new member, as well as an example. Entries marked with an asterisk are mandatory.

- First Name*
- Middle Name
- Last Name*
- Account Type*
- Position Title*
- Academic Unit*
- Email*
- Username
- Telephone
- Homepage
- Office

Acceptable entries for account type, position title and academic unit are dictated by the network. For more information on adding new academic units, please see section 5.1.

Last Name *	Newton
First Name *	Isaac
Middle Name	
Account Type*	Professor
Position Title*	Associate Professor
Academic Unit *	Engineering
Email *	<u>isaac@proximify.ca</u>
Username	IssacNewton
Homepage	<u>http://bit.ly/1gapaSQ</u>

Figure 4 Example of how an excel sheet can be filled out with member information in order to quickly add members.

We include an import template to help quickly set up member accounts for the first time. However, if you want to create your own, the following rules can help you

- The order of the columns does not matter
- Each row corresponds to one member account
- Empty rows are ignored
- If a row provides the same email address of an existing user in the system the row is ignored (this allows you to maintain one document, without worrying about making duplicates)
- Columns that UNIWeb does not recognize will cause an error. Remove any values not being used to create new members.

If you enter a title, academic rank or academic unit that does not exist in the network, you will receive an error message (see Figure 5). This will describe the error, indicate where it is located in your spreadsheet and provide you with a list of suitable replacements. If you fail to complete a mandatory entry you will receive a similar error.

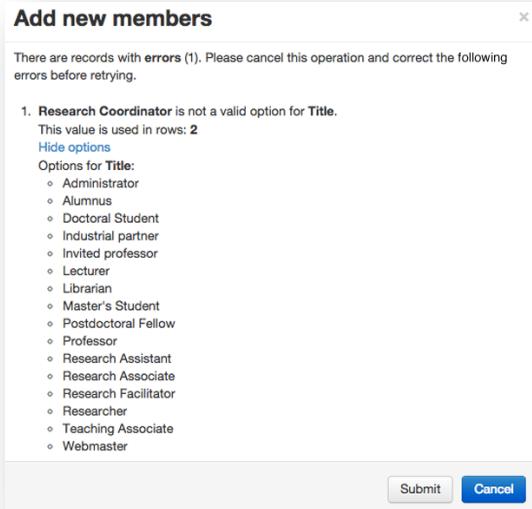


Figure 5 Add New Members error page

2.3. Activate Accounts

Once you have added new members to UNIWeb, you need to invite them to activate their accounts. To do this, choose the desired member, or members, by selecting the checkbox to the right of their row. Then choose Account Activation from the right-hand menu (see ③ in Figure 2). This will send them a welcome email with text and information approved by your institution.

If you have invited members previously, but they have yet to activate their accounts, you can send them a reminder email. To determine who among your users have not yet activated their accounts, choose the **Select Unactivated** option from the right-hand menu (see ② in Figure 2). This will allow you to select users by the number of invitations they have received, but not responded to. Once you have selected those members, you can send them an additional activation email as a reminder.

2.4. Edit Member Information

As a network administrator, you have the permissions required to edit the profile information of your users. To do this, simply choose your desired user's name from the Member list. This will take you to an editable version of their public profile where you can make any of the following changes in the same way that you would on your own page (see Figure 6). If you need access to a users account, see the section on collaboration.

- Name
- Academic Rank

- Academic Unit
- Email
- Telephone
- Homepage
- Office Number
- Research Interests
- Research Description
- Current Teaching
- Selected Degrees
- Biography
- Current Supervision / Current Supervisor
- Research Places
- Selected Publications

The **Fill from CV** button can make the task of filling out profiles easier. This button allows administrators with permission to edit CVs to pull information from specific sections of the CV. Click the button and a pop-up will appear that offers the sections that can be copied over based on what has been filled out in the CV. Select the sections that you want to copy over and then click the button **Copy selected to Profile**. The information copied to the profile can be edited without affecting the information in the CV.

Note: An individual user has the ability to edit everything on their profile except for their title. Only administrators can change titles within UNIWeb because these function as account types and affect several areas of the application.

The screenshot shows the UNIWeb Member Profile Overview page for Albert Einstein. The top navigation bar includes links for Home, Products, About Us, Contact, and Français. A search bar and a support link are also present. The main content area displays Albert Einstein's profile picture, his title (Full Professor), department (Engineering), and university (University of Ottawa). Below this, under 'Research Interests', there is a list of topics: Theoretical Physics, Photoelectric Effect, Quantum Theory, Particle Theory, Relativity, Brownian Motion, Mass and Energy, Gravitation, Ideology and Social Policy, Relation to Space and Time, and Abstract Structures. Under 'Research Description', there is a note: 'If we knew what it was we were doing, it would not be called research, would it?'. Under 'Current Teaching', there is a '+ Add' button. Under 'Selected Degrees', there is a note: 'Teaching Diploma – Mathematics and Physics – Zürich Polytechnic' followed by an 'edit' link.

Figure 6 Member Profile Overview

2.5. Delete a Member

Deleting members from your UNIWeb network will permanently remove them from the system.

To delete members from your UNIWeb network, choose the desired member, or members, by selecting the checkbox to the right of their row. Then choose Delete Selected from the right-hand menu (see ④ in Figure 2).

2.6. Password Reset

To reset a password for one or more of your members, choose the desired member, or members, by selecting the checkbox to the right of their row. Then choose the Password Reset option from the right-hand menu (see ③ in Figure 2). This will send them an email with instructions on how to create a new password.

2.7. Send a Generic Message

You may need to contact all, or many, of your network's members. To do this, choose the desired member, or members, by selecting the checkbox to the right of their row. Then choose the Generic Message option from the right-hand menu (see ③ in Figure 2). This will produce an email window with several options. You can select either UNIWeb or yourself as the sender and you can also choose to send it to only your selected members, or to all members of your network.

2.8. Check Send Status

When you send a large number of emails simultaneously, it can take several minutes for them to be processed. This provides a status window letting you know which emails have yet to be sent (see ③ in Figure 2).

2.9. Download CVs and reports

As a network administrator, you have the permissions required to download the academic CVs and reports of your users. You can download these documents individually or in batches. However, unlike their public profile, you do not have the ability to edit their CV. For information on how to get access to accounts for editing or updating CV's, see the section on Collaboration.

Downloading reports or CV's allows you to generate a report that is automatically filled with the users data. While UNIWeb comes with a typical annual activity report and CV layout, your academic unit or institution may have requested the addition of custom reports for the use of staff and researchers.

To download the reports or CVs, choose the desired member, or members, by selecting the checkbox to the right of their row. Then choose Download CVs from the right-hand menu (see ④ in Figure 2). Multiple files will download as a zip file.

2.10. Cross appointments

When a new member is created, they are given a primary academic unit affiliation. Members can be associated with secondary units as well. This allows administrators to have access to all the people who are part of their unit, without consideration to what other units they may be affiliated with.

Member accounts that are cross-appointed into your unit can be treated in the same way as primary members. You can download reports, send password resets and include them in metrics just as you

would with members that are primarily affiliated with your unit. (For information on adding to or removing members from secondary units, see section 5.6)

Note: You can see which of the members of your unit have cross appointments. Pick a member and hold your mouse over their academic unit. A small pop-up window will appear with the list of all the units that member belongs to.

2.11. Filtering members

A variety of tasks, such as downloading reports, sending password resets, or sending a generic message are performed by first selecting the member(s).

The list of members can be very long, but there is no need to scroll through it and manually find every person that you need.

In order to efficiently perform actions on the members in your unit(s), there are a variety of ways to sort through the list of members. Firstly, you can filter the list based on the academic title or academic unit. If you want the entire department of Environment, select that academic unit in the drop-down and check **All**. Now you can send password resets, or download the CVs, for all the selected members.

If you only want the professors in the department, select "**Professor**" in the academic title drop-down. This will narrow the options to just the professors in that unit.

While sorting using academic unit and academic title can be very powerful, UNIWeb also allows precise searches for users based on their names.

You can search for multiple people at once by typing the names separated with a semicolon.

For example, a search of "**M ; W**" will result in all the users with a last name that starts with M or W. Type more of the names to get more specific.

If you want to search first names, put a comma before typing the name. For example, a search of "**,K**" will result in everyone who has a first name that starts with a K.

These operators can be combined to get the results that you need with little effort.

Search "**Mac ; , Al**" (See Figure 7)

This will result in all the people with the last name that starts with Mac, and all the people whose first name starts with Al.

Profile	Name	Title	Department	Actions
	Batoff, Allison	Professor	External partners, Rehabilitation S...	<input type="checkbox"/>
	MacMillan, Gale	Industrial partner	Aerospace engineering, Proximify ...	<input type="checkbox"/>
	MacRini, Lionel	Professor	Health Sciences	<input type="checkbox"/>
	Smith, Albert	Research Facilitator	Arts, Medicine	<input type="checkbox"/>
	Turing, Alan	Professor	Electrical Engineering and Compu...	<input type="checkbox"/>

Figure 7 Using filters and searches among members. Semicolons separate searches and commas indicate a first name.

This search can be further refined. If you want a search that includes both the first and last name, write “**Mac, G**”. The search of Mac is further narrowed by adding “, G”. The search is asking for a person whose last name starts with Mac and the first name starts with G.

A semicolon will allow you to search for additional people by both first and last name. The search item “**Mac, G; S, AI**” narrows the results in this example to just Gale Macmillan and Albert Smith.

These searches are quick to perform when you need data on multiple people that aren’t easily sorted using the other filters.

3. Research Themes

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

Every UNIWeb network comes with an extensive, pre-defined list of research themes. This list comes directly from the CCV. However, the members of your network have the ability to add additional research themes.

Research themes are nested. Parent themes are subsequently broken down as they get more specific. When adding a new research theme, it is important to be as specific as possible. For more information on the hierarchy of research themes, please see the following example.

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.

The screenshot shows the UNIWeb interface for managing research themes. The top navigation bar includes links for Home, Products, About Us, Contact, and Français, along with a user profile for Albert Einstein and a log-out option. The main menu on the left offers Home, Research, Researchers, Research Places, and Administration. The central content area displays a list of proposed research themes under the 'Themes' tab. Each theme entry includes its name, a breakdown of its nesting (e.g., 'Health Sciences / Neurosciences, Mental Health and Addiction / Anxiety'), the date it was proposed ('2015-02-25'), the proposer's name ('Albert Einstein'), and a 'Review' button. To the right of the list are three circular callout labels: ① points to the 'Review' button on the first theme entry; ② points to the 'Review' button on the second theme entry; and ③ points to the filtering sidebar on the right. The sidebar contains sections for STATUS (Approved: 31, Proposals: 25) and ACADEMIC UNIT (Electrical Engineering and Computer Science: 46, Engineering: 6, Health Sciences: 2, Innovation management: 1, Other: 1).

Figure 8 Research Theme Page Overview ①Theme nesting ②Access to approve, edit or delete a theme ③Filtering options

3.1. Approve a Research Theme

On the Research Themes page, you will see a list of themes proposed by your users. Each entry includes a breakdown of how the theme is nested, as well as the date and individual who proposed it (see ① in Figure 8).

As an administrator, you have the ability to approve, edit or delete a theme. To do this, choose the Review option (see ② in Figure 8). From this window you can edit the nesting of the new theme, the theme name and provide a French translation (see Figure 9). Then you can select to approve the theme. Once you approve a theme, your name will appear next to the entry.

Tip: Use the filters on the right-hand menu to easily navigate among the various themes (see ③ in Figure 6).

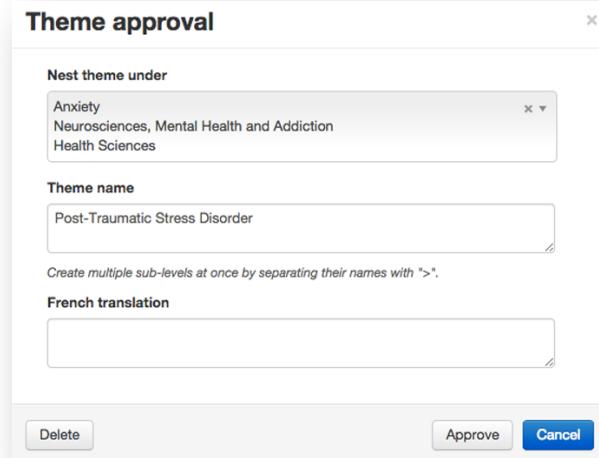


Figure 9 Theme Approval

4. Academic Metrics

The academic metrics section of UNIWeb is where the raw statistical data from the network is collected and translated into meaningful information. As members of the network compose their academic CVs, data from ten categories including publications, teaching activities and funding history are also compiled here (see Figure 10). Information on the performance of academic units or specific groups is gathered from the information added in individual UNIWeb accounts by researchers or staff.

These categories can be used to monitor the achievements and engagement of an institution or faculty over time or can be exported for formal use in a report.

Figure 10 Academic Metrics Page Overview

4.1. Using Academic Metrics

The various categories of academic metrics offer different representations of data, including lists and charts, contingent upon the data available. This data can be filtered in an assortment of different ways. These filtering options are outlined below.

- **Entries:** Number of entries to display on the page (see ① in Figure 11)
- **Academic Units:** Filter by institution, faculties or departments (see ② in Figure 11)
- **Academic Titles:** Filter by title such as professor, doctoral student or researcher (see ③ in Figure 11)
- **Year Range:** Select the range of dates between which to display data (see ④ in Figure 11)
- **Chart Type:** (In cases when a chart option is available) Select which type of chart to display (see ⑤ in Figure 11)

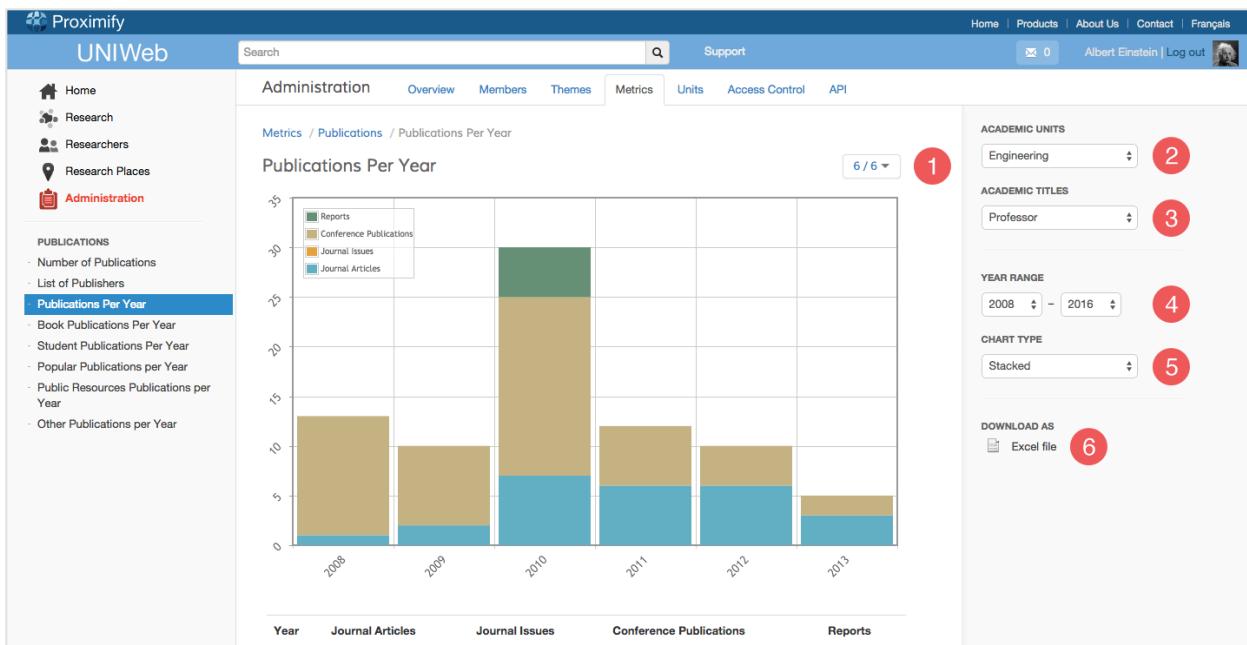


Figure 11 Publications Per Year Page Overview ① Number of entries ② Academic units ③ Academic title ④ Date range ⑤ Chart type ⑥ Download as

To download the data contained on an academic metrics page, select the Download As option from the right-hand menu (see ⑥ in Figure 11). This will create an Excel document using your filter selections.

4.2. Export Custom Metrics

If you want access to the raw data in order to perform your own metrics you can export this data as an Excel file. On the main page, click the button on the far right, **Export Custom Metrics**.

This will open a new page that will allow you to select what type of data you want to download. It can be filtered based on department, the type of staff, a date range, and what type of data you want, listed based on section of the CV (See Figure 12). Note that multiple options can be selected.

Once you have made your selections, type in the name you want the excel file to have, and then click **Download**.

Download metrics as an Excel file

Academic Units: Proximify University

Academic Titles: 4 items selected

Date Range: 2000-03-28 – 2017-03-28

Selected Sections: Any

File name: metrics_export.xlsx

Download **Done**

Figure 12 The options available when downloading custom metrics. The dropdowns allow for multiple selections, and the file will be compatible with Excel

5. Academic Units

In UNIWeb, academic units exist in a hierarchy and define the structure of the network. This hierarchy begins with the institution and breaks down into the academic units and sub-units. Academic units have a name, a unit type and a parental unit. See the following example.

Example

Name: **Visual Arts**

Unit Type: **Department**

Parental Unit: **Faculty of Arts**

The Academic Units list, like many Administration pages, has helpful search and filtering options at the top of the page (see ① in Figure 13). If you begin typing a unit name, UNIWeb's search will narrow down your list of options.

Figure 13 Academic Unit Page Overview ① Search and filter by unit type and parental unit ② Unit creation options ③ Additional tools

5.1. Add an Academic Unit Manually

As a network administrator, you are responsible for defining the academic units of your network. To manually add a new academic unit to your UNIWeb network, select the Add a New Unit option from the right-hand menu (see ② in Figure 13) and complete the popup form (see Figure 14). You will be given the option to enter a homepage, but this is not a mandatory field.

Parent unit	<input type="button" value="select"/>
Unit type	<input type="button" value="select"/>
Unit name	bilingual
Homepage	bilingual
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 14 Create an Academic Unit

5.2. Add Academic Units from an Excel Document

When setting up your UNIWeb network, you may need to add many new academic units. To do this efficiently, you have the option to import from an Excel document.

When you import academic units from an Excel document, UNIWeb scans the document and only adds units that do not yet exist in the network. This allows you to maintain a single file, which you can update outside of UNIWeb, and upload numerous times without the risk of creating duplicate units.

When you select the Add Units from a File option from the right-hand menu (see ② in Fig. 10), you are able to download a template document. This supplies an outline of the necessary data that must be provided for new units.

The following lists all of the fields included in the template document, as well as an example. Entries marked with an asterisk are mandatory.

Type *	Department
Unit *	Civil Engineering
Parent Unit *	Engineering
French Name	Génie civil

Acceptable entries for title, academic rank and academic unit are dictated by the network. For more information on adding new academic units, please see section 5.1.

If you enter a title, academic rank or academic unit that does not exist in the network, you will receive an error message (see Figure 15). This will describe the error, indicate where it is located in your spreadsheet and provide you with a list of suitable replacements. If you fail to complete a mandatory entry you will receive a similar error.

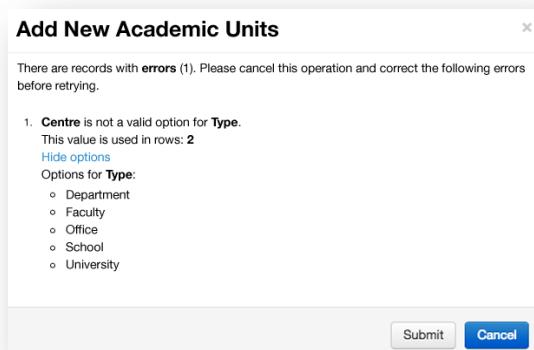


Figure 15 Add Academic Units

Acceptable entries for unit type is dictated by the network. For more information on adding new unit types, please see section 5.5.

5.3. Edit an Academic Unit

To edit an academic unit, select its name in the unit list and you will be directed to a page containing more detailed information. From here, you can choose to edit that information.

Administrators can assign default CV templates here, add website addresses to unit homepages, assign research clusters as well as add members who are appointed to multiple academic units.

When you add an academic unit, you define characteristics such as its name and unit type. This page provides you with additional options. These options are defined below.

- **Name:** Academic unit name
- **Type:** Academic unit type
- **Parent Unit:** The higher level unit that contains this unit. For example, the Faculty of Engineering would contain the Department of Electrical Engineering. The Faculty is the parent unit.
- **URL Name:** How you would like the academic unit name to appear in the UNIWeb URL (it must be lowercase and contain no spaces)
- **Homepage:** Link to the website address of this academic unit
- **Public Visibility:** Whether you would like this academic unit to appear in the public version of your UNIWeb network
- **Colour:** The colour value that will represent this academic unit (provided as a 6-digit hex value)
- **Default CV Template:** Select a CV template to be preselected for users affiliated with this academic unit. Users can still select from other options.

Note: If you do not define a colour value for an academic unit, it will inherit the colour of its parent unit.

The screenshot shows the 'Edit an Academic Unit' interface. On the left is a sidebar with links: Home, Research, Researchers, Research Places, and Administration (which is selected). The main area has tabs: Administration, Overview, Members, Themes, Metrics, Units (selected), Access Control, and API. Below is a section titled 'Unit Information' with fields for Name (with en and fr tabs), Homepage (with en and fr tabs), Type (Faculty), URL Name, Public visibility (checked), and Colour (ff3333). At the bottom are Save, Cancel, and Delete buttons.

Figure 16 *Edit an Academic Unit*

5.4. Delete an Academic Unit

Deleting academic units from your UNIWeb network will permanently remove them from the system.

To delete an academic unit from your UNIWeb network, choose the desired unit, or units, by selecting the checkbox to the right of their row. Then choose Delete Selected from the right-hand menu (see ③ in Figure 13).

5.5. Add a Unit Type

The unit type is the category of an academic unit. Common unit types are faculty, department or office, but you also have the option to add new types.

To add a unit type, select the Add Unit Type option from the right-hand menu (see ③ in Figure 13). Here you can enter your new unit type and it will become an available option across the network.

5.6. Add existing Members to secondary Academic Units

Cross-appointments are a sophisticated combination of permissions that is designed to facilitate the gathering of academic data for administrators. While all members have a primary unit affiliated with their account, secondary units can be added. Adding secondary units reflects the real-world appointments of that user, while also allowing administrators with the permissions over the secondary unit to easily access the member's data, download reports, and otherwise treat the cross-appointee as a member of that unit. The most important difference between a primary and secondary unit is that the primary unit is displayed at the very top of the members profile page, next to their name and title, while secondary units are listed elsewhere on the page. If you want to change a user's primary unit, see section **2.4, Editing member information**.

Users can add their cross appointments themselves (see the user manual for more info), or administrators can add cross-appointments to their units. To add a member to a secondary unit, you need to have two administrative permissions, 1. Editing Members, and 2. Editing Units (see **Access Control** section 6 for more information on permissions). With those permissions, click the name of the unit that is getting the cross-appointee. This opens up a page for editing and making changes to the unit.

Look for 'Cross-appointees'. Click **Add**.

Figure 17 Cross-appointees. The page to add members to a unit.

Administrators make cross appointments by selecting the name of the appointee. You can scroll through the drop down or simply start typing the name in order to jump quickly through the drop-down list (see Figure 17).

Choose the individual you wish to add to your unit. Click **Save**.

UNIWeb determines the most efficient way to handle the cross-appointment based on the permissions of the administrator. Changing who has access to a user's account usually requires the confirmation of the user, with one exception. If UNIWeb sees that the administrator has permissions over all the units involved in the cross appointment, UNIWeb determines that the administrator has enough authority to permit the appointment to go through immediately. The user will be listed under 'Cross appointees' on the Unit profile page without any involvement on the part of the person being cross-appointed. The user will see the cross appointment on their profile page.

If UNIWeb finds that the administrator's permissions do not include the unit that the member is a part of, then UNIWeb will have the user being cross appointed confirm the appointment. UNIWeb will send them a notification within their UNIWeb account. The notification will state that 'X' administrator wants to appoint the user to 'Y' unit. Then the user can confirm or deny the appointment. As soon as they have confirmed the appointment, it will appear on their profile page.

In the case where the user has to confirm the appointment the new cross appointee will be listed on the Unit info page under 'Cross appointees' with a **Pending** tag next to their name, to show that the member has yet to confirm their appointment. UNIWeb will send the user a notification in their UNIWeb account that they have received this appointment (To learn more about notifications, see section 8.3). If they deny, the 'Pending' tag will switch to **Denied**. If the member confirms the appointment, the tag will disappear altogether.

5.7. Removing cross appointees from a unit

Removing a member from a cross-appointment also takes away the administrative access to their data through that unit. Administrators can remove cross-appointments by selecting the unit, and scrolling to the list of cross appointees. Click the **Edit** button on the right. Here you will see the same page as for adding members. Click **Delete** in order to remove the cross-appointment.

6. Access Control

The Access Control section of UNIWeb consists of two components: Roles and Member Access (see Figure 18). A role is a set of permissions assigned to a particular type of user, please see the following example.

Example

Role Name: **Health Sciences Administrator**

Unit: **Health Sciences**

Permissions:

- Approve New Themes
 - Assign Roles to Members
 - Create New Accounts
 - Delete Existing Accounts
 - Edit Member Information
 - Send Email Invites
 - View Analytics
-

The member access section is where you assign these roles to users of your network.

When your institution sets up their network, the Proximify team will create your first administrator accounts. As an administrator, it is your responsibility to assign roles to future users.

The screenshot shows the UNIWeb Access Control Page Overview. At the top, there's a navigation bar with links for Home, Products, About Us, Contact, and Français. On the right, it shows a message icon (0), a user profile for Albert Einstein, and a Log out link. Below the navigation is a search bar and a support link. The main content area has tabs for Administration, Overview, Members, Themes, Metrics, Units, Access Control, and API. The 'Access Control' tab is active. The first section, 'Roles' (marked with a red circle 1), lists two roles: 'University Administrator' and 'System Administrator', both assigned to the 'University' unit. Each role has a list of permissions: University Administrator has 13 permissions like Approve new themes, Assign roles to members, etc.; System Administrator has 9 permissions like Create new accounts, Delete existing accounts, etc. There are 'Edit' and 'Remove' buttons for each role. The second section, 'Member access' (marked with a red circle 2), shows a single member, 'Admin, Proximify', assigned to both roles. There's a 'Add a member' button.

Figure 18 Access Control Page Overview ① Roles section ② Member access section

6.1. Create a Role

Every role has a name, is assigned to a unit and allows a user to have access to, and be able to perform, specific tasks.

To create a new role, select the Create a Role option (see ① in Figure 18). From this window, you will be able to give your role a name, assign it to an academic unit and choose its permissions. These permission options are defined below.

- **Approve New Themes:** Edit, delete or approve research themes proposed by users
- **Assign Roles to Members:** Grant permissions to members of your network
- **Create API Clients:** Grant other software systems secure read/write access to information stored by UNIWeb
- **Create New Accounts:** Create user accounts
- **Delete Existing Accounts:** Delete user accounts
- **Edit Academic Units:** Add, edit or delete academic units and unit types
- **Edit Member Information:** Edit the public profile data of users
- **Edit Roles:** Add, edit or delete permission schemes
- **Send Email Invites:** Invite users to join the network
- **View Analytics:** View and download analytical data from an academic unit or institution

Note: If you define a role under a specific academic unit, users with that role will be granted permissions related to that unit and all of its sub-units. If you want a role to have access to all members and academic units of the network, choose the name of your institution as the unit.

6.2. Edit a Role

To edit a role, select the Edit option from the right of its row.

6.3. Remove a Role

To remove a role, select the Remove option from the right of its row.

6.4. Add a Member

When you add members to your network, they are given basic user permissions by default. To grant a member of your network additional permissions, select the Add a Member option (see ② in Figure 18). From this window you will be able to choose their name from a drop down list and select which roles to assign.

6.5. Edit a Member

To edit the roles assigned to a member, select the Edit option and add additional roles or remove existing roles.

6.6. Delete a Member

To remove all roles from a member, select the Edit option and choose Delete.

This will only remove their administrative permissions. This will not remove the user from UNIWeb and their CV data and profile will remain untouched. For more information on deleting a member from UNIWeb, please see section 2.5.

7. API Access

The UNIWeb API (application program interface) provides a simple way for other software systems to interact with UNIWeb. The objective of the API is to integrate UNIWeb within your existing software in order to eliminate the need to duplicate data, please see the following example.

Example

Your accounting software could access the API to automatically update its information whenever a researcher receives new funding and enters that data into UNIWeb. Similarly, your faculty website could access the API to automatically update its information whenever a professor adds a new publication and enters that data into UNIWeb.

Figure 19 API Access Page Overview ① Create a client

The screenshot shows the UNIWeb administration interface. On the left, there's a sidebar with links: Home, Research, Researchers, Research Places, and Administration (which is currently selected). The main area has tabs: Administration, Overview, Members, Themes, Metrics, Units, Access Control, and API. The API tab is active. Below it, a table lists clients. One row is shown for 'HR', created by 'Einstein, Albert'. There are 'View' and 'Remove' buttons to the right of the row. A green 'Create a client' button is at the top right of the table area, with a red circle containing the number '1' overlaid on it.

7.1. Create an API Client

In order to authorize another system to interact with UNIWeb, it must first be provided with authorization. To do this, select the Create a Client option (see Figure 19). From this window you will be able to choose a name for your new client.

When you select the View option from the right of its row, you will see your client secret. This is the randomly generated password.

Any API clients that you create will inherit your UNIWeb permissions. This means that they will allow other systems to read or write any information that you currently have access to. In order to create these API clients,

Note: In order to create API clients, you require Create API Client permissions. For more information on roles, please see section 6.1.

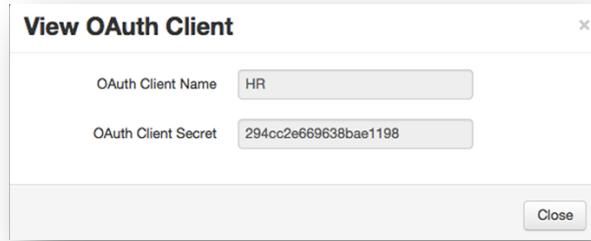


Figure 20 View Client Secret

7.2. Remove an API Client

To delete an API client from UNIWeb, select the Remove option from the right of its row.

For more detailed information on the UNIWeb API, please visit <http://proximify.ca/?api>

8. Collaboration

Research requires collaboration, and that's why we have created Account delegation. Account delegation allows UNIWeb users to allow other UNIWeb users to make modifications 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**.

8.1. Inviting Account delegates.

In order to invite a delegate to your account, that is, to allow someone to have access to your account, click your username in the top right of the screen (see ① in Figure 21). This will open a dropdown. In the dropdown is an item called **Delegate access**. Next to that it says **Invite** (see ② in Figure 21).

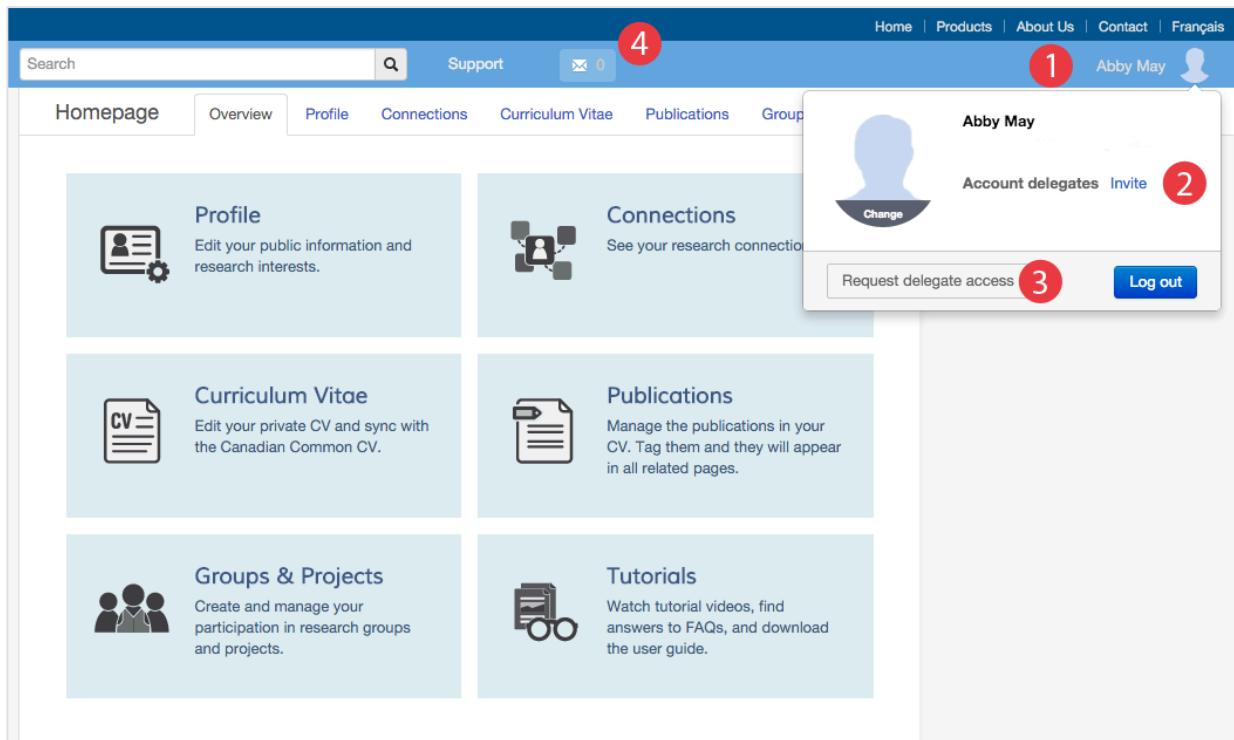


Figure 21 User Account Dropdown ① Username ② Account Delegates Invite button ③ Request Delegate Access button ④ Notifications

Click **Invite**, and a pop-up window will appear with a list of all UNIWeb users (see Figure 22) 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.

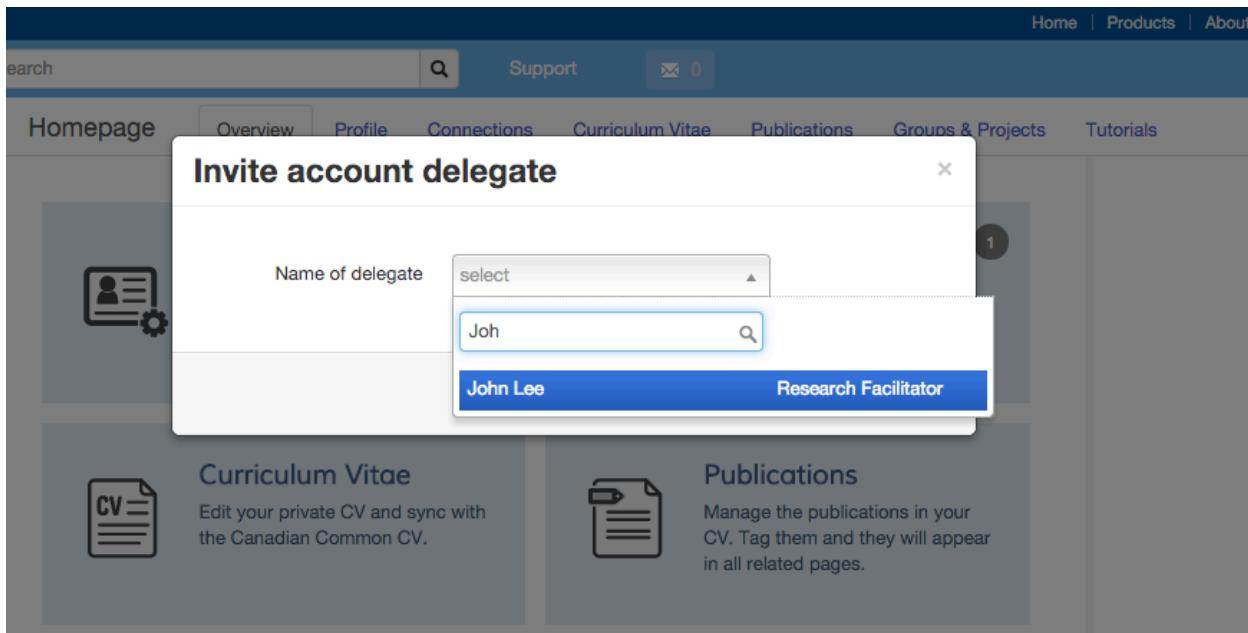


Figure 22 Finding account users

Once they have gotten the notification and confirmed their access, 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.

8.2. 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 Figure 21). 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.

8.3. Notifications

UNIWeb will notify users when changes are being made that affect their accounts. UNIWeb does this through the notification button at the top of a user's account, which changes colour and keeps a tally of the number of notifications yet to be read (see Figure 23). The user clicks the button to see the notifications.

For example, the delegates feature (adding a user to edit your account, or adding yourself to edit another member's account), uses the notifications to let you know if someone wants you to edit their account, or to inform you if your status as a delegate has changed.

Notifications are also used when an admin adds a user as a cross-appointee, in the case where the admin does not have permissions to the unit that they are appointing the user to. The user will be notified in this case to confirm the cross appointment.

The notification will either ask the user to confirm or deny a change (such as a request for delegation) or simply make the user aware of a change (A user removing themselves as a delegate), which can simply be dismissed when read.

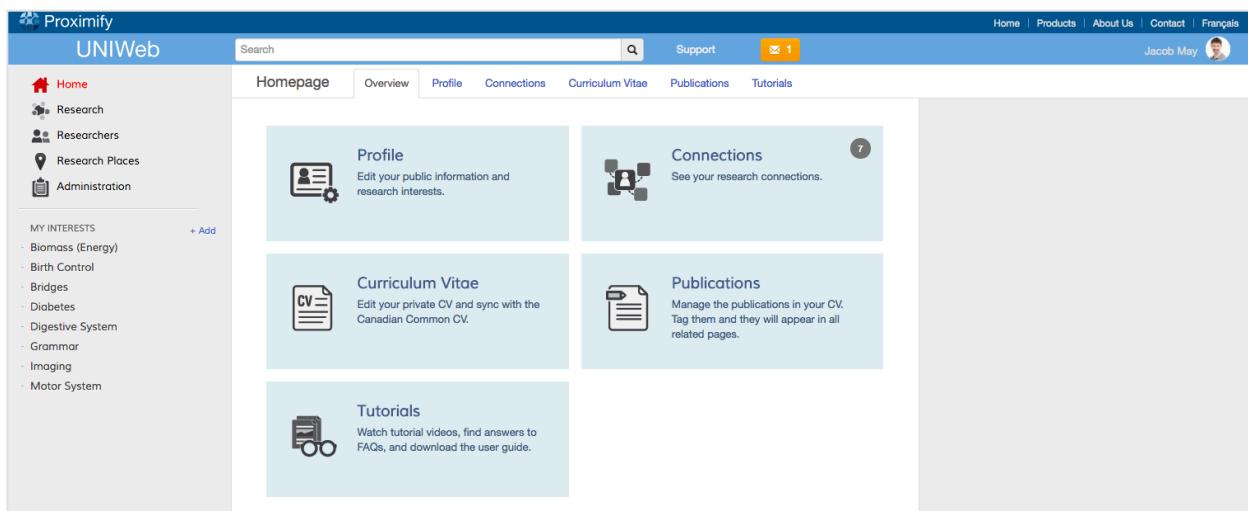


Figure 23 A notification (the button in yellow) in this user's account. Notifications inform users of changes to their account. The user clicks it to read the message.

9. Customizing reports, data and templates in UNIWeb

9.1. Custom Reports

While UNIWeb comes with a set of an annual report and a CV that has options that can be set at download, your academic unit or institution may want to offer more options to users. Duplicate your existing report guidelines in UNIWeb, or design an entirely new report to take advantage of the

existing report guidelines in UNIWeb, or design an entirely new report to take advantage of the advanced calculations and data presentation that UNIWeb Reports can perform. Request a quote from Proximify by emailing requests@proximify.ca.

The design a report template includes at minimum three things:

- A mapping that dictates where in the UNIWeb CV you want data to come from, and where it is to be presented in the report. Data can be arranged in any order, it is not constrained by where it appears in the UNIWeb CV.
- The formulas applied to the data. The most common examples of this are lifetime summaries, such as of funding, publications, or students graduated. UNIWeb Report takes the raw data and can perform the necessary calculations in order to make the data meaningful to reviewers.
- The layout and styling of the report. A sample document is the easiest way to present how you want the document to look.

For more information on the report design and creation process, see **Report Design** on our **Documentation** page at:

https://uniweb.network/clients/Proximify/uniweb/published/docs/report_design.pdf

9.2. Custom Data

The data fields in UNIWeb can be expanded to collect data beyond what is gathered by the CCV website. Additional data fields will expand on what can be included in reports CVs and metrics. Adding new data fields or sections does not affect the interactions between UNIWeb and the CCV. Go to the **Documentation** section of UNIWeb to download both the Guide to requests and an excel spreadsheet to help fill out your request. Feel free to contact us for help at requests@proximify.ca.

9.3. Custom Templates

Simplify the process of updating the UNIWeb CV by designing your own input templates, similar to the CCV input templates for funding competitions. These templates can be assigned to an academic unit to allow researchers in that unit to input data without being affected by data field additions for other units, which can be filtered out by the template. Or the template can be designed to assist with the data entry of a specific internal report. For guidelines on making a request, go to the **Documentation** section of UNIWeb to download both the Guide to requests and an excel spreadsheet to help fill out your request. Feel free to contact us for help at requests@proximify.ca.