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Sample video script for rolling the Discovery Module out to users

Symplectic
c/o Digital Science
6 Briset Street, London, EC1m 5NR

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Discovery Module “Roll Out” sample script to help user orientation with Discovery

Following is a short list of items Symplectic recommends covering in a short video for your users. Please do not just share the accompanying video as your Elements system will have customisations that have been agreed during your Discovery Module Implementation.

1. Login- you may have SSO in place or you may be using the Elements Login screen
2. Go to “EDIT MY PROFILE”
3. Explain how to set the whole profile to PUBLIC (if configured for users to do so)
4. Explain how to set individual items to “PRIVATE” in the case the user does not want them displayed on the Discovery Module.
5. Request users populate as much information as possible on this page and as a minimum set you should encourage they complete the following fields:
6. Add a photo
7. Overview- upweighted for Search in the Discovery Module
8. Research Interests- upweighted for Search in the Discovery Module
9. Teaching Summary- upweighted for Search in the Discovery Module
10. Adding and removing Labels- this will be configured to a set specifically for you and our basic set is covered in the accompanying video.
11. Organisation Appointments- depending on your configuration this may be being populated through a feed with the data being used to populate your “Department” filter (which you may have given a custom name to) on the Discovery Module. If the data is being fed in from a third party system, it would be nice to tell users who to contact in the case of the data containing errors.
Note: You can skip this if your Discovery Module is configured to use data from the HR feed or an Organisational Field.
12. Education> Degrees
13. Addresses > Web Addresses and Social Media
14. Media

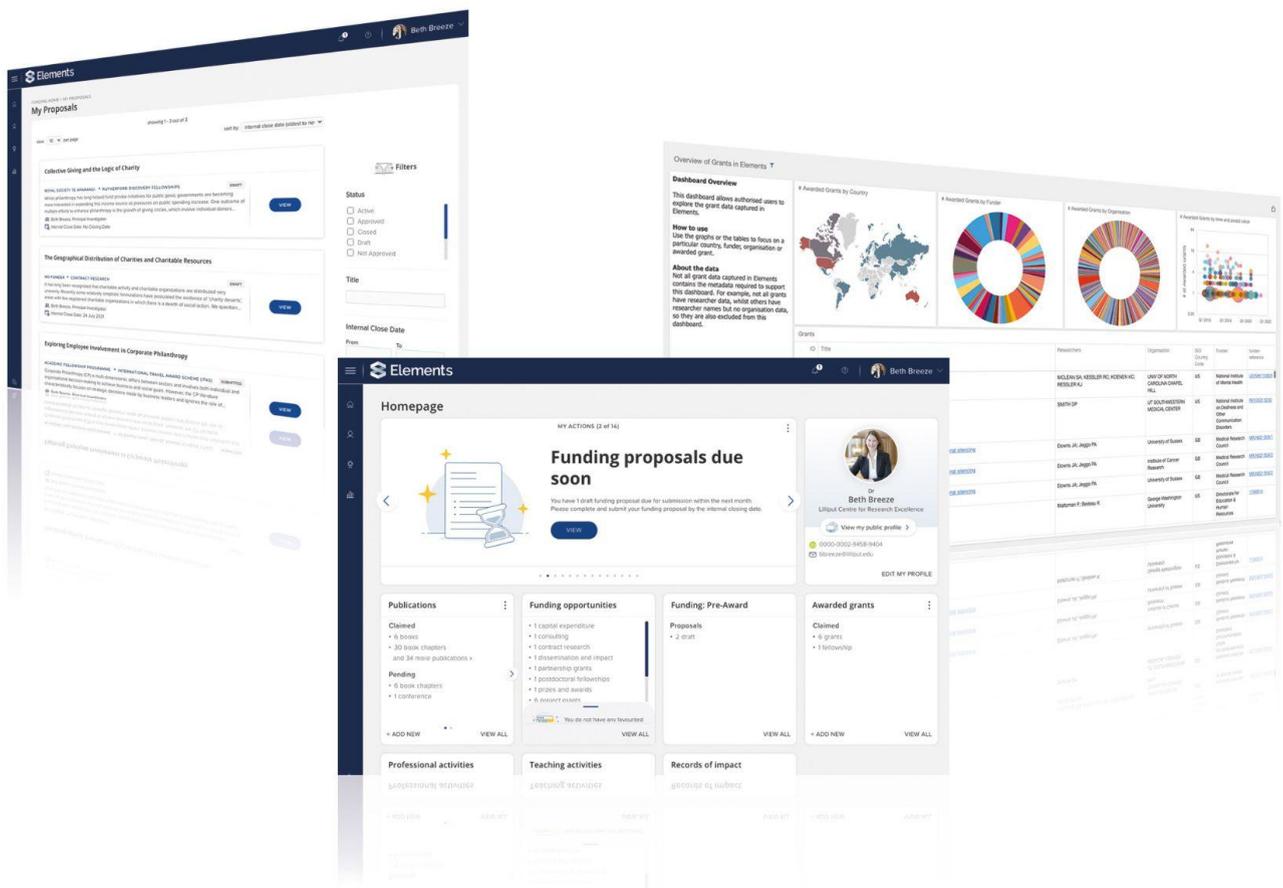
Then navigate to the Homepage and then Publications, pointing out that the Favourite and Privacy functions are common to Grants, Professional Activities and Teaching Activities. Note: You may have custom names for this in your Elements System, ensure you use the correct terms for your configuration.

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15. Using a Publication as an example, show how you toggle favourites and explain this will bring a record to the top of the Publications list in Discovery.
 16. Show how to make an individual Publication Record “INTERNAL” (so that it does not display on the Discovery Module)
 17. Explain that changes made to their Elements Profile are normally* updated on the Discovery Module within 2 minutes.
 18. Show how to access the Discovery Module profile from the homepage and Elements Profile page.
Note: the button is only available if the Profile is set to PUBLIC.

* Normally means during normal day to day operation. There are some things that can affect this. The most common reasons for data not updating within 2 minutes are: 1. During an upgrade to a new Elements version and 2. When the Reload all Discovery Module Data job is running.



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enquiries@symplectic.co.uk



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