

1. Introduction

This document is intended to supplement the ResearchTools User Guide with the additional features that are available to the “owner” of a site.

It is assumed that you have already read the ResearchTools User Guide and are familiar with the terms used and are comfortable navigating around the ResearchTools system.

This guide is task-oriented, showing step-by-step how-to instructions. If anything is not clear, please contact it.servicedesk@ncl.ac.uk for support.

2. Adding participants to your site

2.1 Registering a new user

If the participant you want to add to your site is not currently a member of any ResearchTools site, a new account will have to be created for them before they can be added to your site. For members of Newcastle University, their normal ISS username will be used. You can find this by using the advanced search in the University’s People Search tool.

You can also add users from outside the University, but they will need to first register for a User ID with Protect Network. Anyone can obtain a free Protect Network ID from the Protect Network website.

(See the Protect Network section here <http://www.ncl.ac.uk/itservice/vre/> for a current link to Protect Network)

Once you know the User ID (whether it’s Newcastle University or a Protect Network ID), complete the request form at <https://crypt.ncl.ac.uk/helpdesk/vre/add-users.php>.

2.2 Adding a user to your site

Once a user’s ID is registered within ResearchTools, they can be added as a participant to your worksite.

- Navigate to the site you want to add the participant to.
- Select the ‘Site Info’ tool.
- Select ‘Add Participants’ from the Actions bar.
- Enter the user’s full ID (including ‘@idp.protectnetwork.org’ or ‘@ncl.ac.uk’).
Note: You can add more than one participant at the same time by entering their IDs on separate lines, with no punctuation.
- If you are adding more than one user, choose whether or not they will all have the same roles within the site.
- Click the ‘Continue’ button.
- Select a role for the participant(s) and click ‘Continue’.
- Click through the ‘Continue’ and ‘Finish’ buttons and you will be returned to the ‘Site Info’ tool with the new participants added to the list of users.

Once you have added the user to your site, you will need to tell them about it. It's probably a good idea at this stage to also pass them a link to the User Guide:

https://researchtools.ncl.ac.uk/access/content/public/ResearchTools_User_Guide.pdf

3. Edit site information

You can edit the information that is displayed on your site's Home page and in the Site Info tool.

- Navigate to the 'Site Info' tool of your site.
- Select 'Edit Site Information' from the Actions bar.
- Change the required information and click 'Continue'
- Check the details and, if correct, click on the 'Finish' button.

4. Add or remove tools from the site

- Navigate to the 'Site Info' tool of your site.
- Select 'Edit Tools' from the Actions bar.
- Check or uncheck the boxes by the tools you want to add or remove.
- Continue through the form, checking and amending details as necessary.

5. Manage groups

Within a site, groups of users can be set up. An individual user can be a member of more than one group.

Groups can be used with the following tools:

- Announcements – announce to certain group(s) only.
- Calendar – events visible to certain group(s) only.
- Resources – files/folders only available to certain group(s).
- Messages – send to certain group(s).
- Forums – topics available to certain group(s) only.

To add or edit groups within your site:

- Navigate to the 'Site Info' tool of your site.
- Select 'Manage Groups' from the Actions bar.
- Select 'Add' from the Actions bar to add a new group or 'Edit' to edit an existing group.
- Continue through the form, checking and amending details as necessary.

6. Changing the order of the Tools menu

- Navigate to the 'Site Info' tool of your site.
- Select 'Page Order' from the Actions bar.
- Drag and drop the tools you want to move.
- Click the 'Save' button.

7. Feedback

If you could provide any feedback or suggestions for improvements, for either ResearchTools or this documentation, they would be gratefully received. Please contact it.servicedesk@ncl.ac.uk with your feedback.