NYU Scholars for Department Coordinators: A Technical and Editorial Guide

This NYU Scholars technical and editorial reference guide is intended to assist editors and coordinators for multiple faculty members while working within NYU Scholars.

Fall 2017
NYU Information and Analytics Services
NYU Scholars is an online tool that organizes scholarly publications and research-related materials for participating NYU faculty members, researchers, and clinicians. The NYU Scholars public portal allows scholars as well as journalists, donors, and policymakers to find NYU faculty members who are working at the forefront of scientific inquiry. This guide has been designed with the Department Coordinator in mind and is intended to be used as a technical and editorial guide while working within NYU Scholars.

Online Tutorials & Guides
A comprehensive suite of online tutorials is available to assist in your learning of NYU Scholars. Sections 2 – 6 in this manual accompany 5 video tutorials; the following sections also include a host of guidelines to assist in your successful use and navigation of NYU Scholars.

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Logging In
To access NYU Scholars, paste the direct URL in your web browser:
https://nyuscholars.nyu.edu/admin/ If prompted, enter your Net ID and NYU Home Password.

Getting Started with NYU Scholars
Many training and support tools are available when you are logged into your NYU Scholars account. To access them, simply place your mouse over “Help and support,” located on the lower right-hand corner of all NYU Scholars pages. In the “Manuals” section, it is suggested that the “Pure For personal users” manual be used as a reference, as it contains in-depth information about many topics relevant to NYU Scholars accounts, such as: user profiles, publication items, and functionality of accounts.

Lower right hand corner of screen, place mouse over “Help and support”:

“Pure For personal users,” in manual section:
Online Tutorials & Guides

- Seven online video tutorials have been created by the NYU Scholars project team and can be accessed in the NYU Scholars Resource and FAQs site.

- The NYU Scholars Resource and FAQs site also contains many Frequently Asked Questions, instructions, and metadata.

- Additional screencasts developed by our software provider, Elsevier, are accessible under the “Help and support section” of NYU Scholars.

The below sections, 2-6, are visual guides to accompany the online video tutorials available to you in the NYU Scholars Help and FAQs site, and contain guidelines for your use of NYU Scholars.

Section Index (click on the section name to navigate)

2) Research Output List : Publications
3) Editing Publications
4) Adding Publications and Other Professional Information
5) Create and Edit a CV
6) Public Portal
Landing Area

Upon logging in, there will be distinct tabs on your landing page:

1) Editor 2) Master data and 3) Dashboard

Snapshot, partial view of a landing page for a Department Coordinator:

The Editor tab houses all faculty publication items, referred to as “research output.”

Features of the Editor tab include:

- Research output: sortable and searchable
  
  *Research output can be sorted by author, year, type, and more by clicking on the drop-down arrow next to “Sort by.” Specific publications and/or publications by individual authors can be located by using the “Search for” box, top of screen.*

- Research output can also be downloaded into a variety of formats, bottom of screen:
  
  Download list: PDF | Excel | HTML | RIS (RefMan) | Word | BibTeX
Features of the **Master data** tab include:

*Personal profile details for individuals in your department are housed in this area of the portal. Click on faculty or staff lines to display the persons and their affiliated profile details:*

    Example: Master data overview tab, partial view

![Persons](image)

*When a list of faculty members are displayed, profile details for an individual can be accessed by clicking on the individual’s name.*

Profile functionality that you may choose to customize includes:

- Adding profile pictures
- Adding links to faculty members’ personal research pages, or similar links
- Adding educational or professional qualifications of faculty members
- Linking to ORCID accounts

Features of the **Dashboard** tab include:

- Departmental dashboards, featuring publication and citations data

    *Fixed dashboards can be accessed by utilizing the first drop down arrow, far left of screen:*

![Dashboard](image)
1. Research Output List: Publications

_A list of all your publications will display._
Options within Research output include:

- **Publication lists can be downloaded**

  *To download a publication list, go to the bottom of the screen. A range of formats are available:*

  [Download list: PDF | HTML | RIS (RefMan) | Word | BibTeX]

- **A search box is available for locating specific publications**

  *Search box, located at the top of the screen:*

  [Search for research output...]

- **Complete publication records are viewable when clicking on publication titles**

  [The Influence of Ethnic Match on Latino School-Based Family Engagement
  Research output: Contribution to journal > Article]

  *Detail of the selected publication record metadata, partial view:*
• For Scopus items, links to DOIs and citation metrics are available

Detail of a Scopus publication record metadata, partial view:

Note the live links to DOI, Scopus record, and citation data.

Clicking on “show,” located next to a link, will automatically open link:
Most publications that were imported from Scopus, or other sources, are flagged as "Published".
Most publication items are editable. Should the editor choose to edit publication items, the following sections outline editorial practices used in NYU Scholars.
**Capitalization**

NYU Scholars follows most APA/Harvard guidelines for capitalization. Two exceptions to this rule: Proceedings Volumes and Series Titles. APA and Harvard call for making them sentence case, but that is inconsistent with how they are represented in NYU Scholars.

**NYU Scholars capitalization guide:**

<table>
<thead>
<tr>
<th>Type</th>
<th>Case</th>
<th>Major Words</th>
</tr>
</thead>
<tbody>
<tr>
<td>Journal article title, chapter title</td>
<td>Sentence case</td>
<td>First word cap only</td>
</tr>
<tr>
<td>Book title</td>
<td>Sentence case</td>
<td>First word cap only</td>
</tr>
<tr>
<td>Subtitles</td>
<td>Sentence case</td>
<td>First word cap only</td>
</tr>
<tr>
<td>Journal/Periodical title</td>
<td>Title Case</td>
<td>Cap All Major Words</td>
</tr>
<tr>
<td>Proceedings volume title</td>
<td>Title Case</td>
<td>Cap All Major Words</td>
</tr>
<tr>
<td>Series title</td>
<td>Title Case</td>
<td>Cap All Major Words</td>
</tr>
</tbody>
</table>

**Peer-reviewed / Not peer-reviewed**

If an output requires a peer-reviewed or not peer-reviewed designation, NYU Scholars always defers to peer-reviewed. Peer-reviewed is selected only if the author explicitly states as such.

*Peer-reviewed / Not peer-reviewed: Default in NYU Scholars is always peer-reviewed*

**Book reviews**

Italics and title case should be used for the title of the book. Some reviews have their own titles, others do not. Examples:

- Review of *This is the Name of the Book* by John Author (Title field)
- My review title: Review of *This is the Name of the Book* by John Author (Title and Subtitle fields)
Adding an Author(s)
Begin with faculty name – enter name in the provided search box. Choose from selection of internal names that appear.

For co-authors, “add person” is available. (Both external and internal co-authors will be options.) Click on “Add person,” begin to type in last name of co-author. From list of names displayed, choose person you would like added as co-author. If person does not appear in list, select “create external person” and follow prompts. Order of authors can be changed by using arrow indicators.

Adding an Editor(s)
If the researcher is the editor of a publication item, not the author (author is the default) - choose “Edit”, right of the author’s name. Then choose “Editor” from the “Role” drop-down list.
Note the “Edit” button, right of the Author’s name:

After the “Edit” option is clicked, a drop-down list is accessible and role can be changed:

Publication Dates and Status
When populating date fields, only the publication year is required. If a publication month is known, enter the number. For example, if the month of publication is May, enter 5 in the month box. For items “in press” etc. enter the current year as the date unless it otherwise indicated, and choose the accepted/in press status drop-down option.

If the date is missing from a publication, or unknown - the default year to use is 1800.
DOIs, URLs, and Electronic Versions

If an item has a DOI, URL, or electronic version, populate the “Electronic version, other link, or other file” boxes. To test that a URL is working, click the “show” icon to connect to the web page.

Example: if a link box is populated, it can be tested by clicking the “show” icon.

Copying an Entry

For publication items that are very similar – for example, chapters in the same book – an entry can be copied and edited. To create a duplicate of an entry: click the “duplicate page” icon in the lower right-hand corner of the existent entry. A copy of an original entry will not have a duplication icon – until the entry is saved.

Bottom right-hand corner of an entry, with “duplicate page” icon:

Bottom right-hand corner of a copied entry, prior to saving:
Deleting an Entry Created by a User
If you mistakenly created an entry, it can be deleted by clicking the “red x” icon in the lower right-hand corner of the entry. Deleted items cannot be retrieved, so caution is always recommended when using delete.

Bottom right-hand corner of an entry, copy and delete icons:

Duplicates
Duplicate entries do exist in NYU Scholars. The NYU Scholars team is working closely with Elsevier to merge any duplicate entries in order to preserve the integrity of the information and citations data. If you do find a duplicate entry, please email the NYU Scholars project team with details about the publication: NYUScholars@nyu.edu
3. Adding Publications and Other Professional Information

You may customize your profile by adding research output, activities, press clippings and more.
Click add new.

Select the type of item you wish to add.
Creating Publications: Matrix of Output Types

When creating a new publication item in NYU Scholars, many templates are available. This is a matrix of common publication types, to be used as a guide in choosing the correct template. (Publication types that are not included in NYU Scholars are listed at the bottom.)

<table>
<thead>
<tr>
<th>Item</th>
<th>Publication type, common name</th>
<th>Included in NYU Scholars unless noted</th>
<th>NYU Scholars: Research Output, General Category</th>
<th>NYU Scholars: Research Output, Sub-category</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Journal article</td>
<td>Contribution to journal</td>
<td>Article (peer-reviewed)</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Letter</td>
<td>Contribution to journal</td>
<td>Letter</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Comment/debate in a journal</td>
<td>Contribution to journal</td>
<td>Comment/debate</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Erratum</td>
<td>Contribution to journal</td>
<td>Article</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Book review</td>
<td>Contribution to journal</td>
<td>Book/film/article review</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Editorial in a journal</td>
<td>Contribution to journal</td>
<td>Editorial</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Book chapter</td>
<td>Chapter in Book/Report/Conference Proceeding</td>
<td>Chapter (peer-reviewed)</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Encyclopedia entry</td>
<td>Chapter in Book/Report/Conference Proceeding</td>
<td>Entry for encyclopedia/dictionary</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Conference paper or presentation, with evidence of publication</td>
<td>Chapter in Book/Report/Conference Proceeding</td>
<td>Conference contribution</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Foreword, introduction, postscript</td>
<td>Chapter in Book/Report/Conference Proceeding</td>
<td>Foreword/postscript</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Book</td>
<td>Book/Report</td>
<td>Book</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Report identified as commissioned</td>
<td>Book/Report</td>
<td>Commissioned report</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Report, monograph</td>
<td>Book/Report</td>
<td>Other report</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Contribution to a publication clearly identified as other than a scholarly journal, such as a professional newsletter or popular press</td>
<td>Contribution to specialist publication</td>
<td>Article, editorial, book review, etc.</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Manual, technical report, handbook, clinical guideline</td>
<td>Other report</td>
<td>Other report</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Research note, policy brief, press release</td>
<td>Other report</td>
<td>Other report</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Blog or other internet contribution</td>
<td>Other contribution</td>
<td>Other contribution</td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Dissertation/thesis</td>
<td>Other report</td>
<td>Other report</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>A/V program, DVD/CD, podcast</td>
<td>Non-textual form</td>
<td>Digital or visual products</td>
<td></td>
</tr>
<tr>
<td>Other Publication Types</td>
<td>Not included in NYU Scholars</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------------------------------------------------</td>
<td>------------------------------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Abstract</td>
<td>exclude</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publication not in Roman alphabet</td>
<td>exclude</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publication in preparation, in progress, submitted for publication, in revision, under review</td>
<td>exclude</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reports explicitly identified as unpublished or working paper</td>
<td>exclude</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interviews or presentations, unpublished</td>
<td>exclude</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Output Guidelines: Frequently Used Outputs**

A host of output templates are available when creating a new publication in NYU Scholars. Some guidelines for frequently used publication outputs are below.

![Output Templates](image)

**Contribution to journal / Contribution to specialist publication**

Most contributions in NYU Scholars fall under the category “Contribution to journal” → “Article.” For journal articles, use this output category except when there is good reason to believe the item was not published in a scholarly journal.

An alternate category for journal articles is “Contribution to specialist publication.” NYU Scholars describes “Contribution to a specialist publication” as “research output that has been published in a domain specific journal, with a more communicative approach.” Examples of specialist publications are:
• Newsletters and newsletter-like publications of professional organizations (eg. Yale Nurse, Optics News)
• Magazines and newspapers such as The New York Times, Huffington Post, Time Magazine
• Items that fall under a category such as “non-scholarly publications,” “popular press.”

Types of journal / book / sub-categories
Other common publication types in NYU Scholars include: chapter in book, book, and report. However, do note the available sub-categories in each of these groups, such as Foreword/postscript (for chapter in books) and Comment/debate (for journals and specialist publications). Comment/debate is commonly used for miscellaneous items such as obituaries.

Conference proceedings
When publication items contain references to a conference/proceeding use the default NYU Scholars category:

Chapter in book/report/conference proceeding ➔ Conference contribution

However, it is suggested to classify the item as a book chapter if:
• The entry includes a book title separate from the reference to a conference, and publisher information.
• A publisher other than the organization associated with the conference is a hint that the item may be a book chapter.

Other reports / Other contributions
Categories have been created for items that do not fall under common publication types. Technical reports, Ph.D. dissertations, and miscellaneous items are classified as “Other reports.” The category “Other contribution” can be used for items with little or incomplete data.

Example: Technical report

▸ **NCOM: Network coding based overlay multicast in wireless networks**
  Ba Le, T. & Liu, Y. Jan 2011 Polytechnic Institute of NYU. (Technical Report)
Data Entry Guidelines

Entry for Conference Proceedings
Conference proceedings comprise a substantial percentage of NYU Scholars publication entries. When creating a Conference proceeding, the title of the item should be placed in the “title of the contribution” box. Include all other information: conference name / proceeding, location / date in the “title of the host publication” line. Proceedings and conference names are title case.

Example 1:

Adaptive optimal control of connected vehicles

Example 2:

Note that Conference proceedings may also have a publisher, such as a host organizer:

Real scaling limits and next generation technology prospects

Publisher
Institute of Electrical and Electronics Engineers Inc.
Entry for Dissertations, Theses
Dissertations and theses are included in NYU Scholars, but other graduate student work, such as qualifying papers, are excluded. Template used for these items is “Other report.” The type of publication can be entered into the title box, and the item name can be placed in subtitle.

Example: Ph.D. dissertation

Ph.D. dissertation: Scheduling and load balancing
Regev, O. 2001 Tel Aviv University.
Research output: Book/Report > Other report

Entry for Special Reports: Policy, Technical, or Other
Similar to dissertations, the type of publication can be entered into the title box. The item name can be placed in subtitle. The series field can be used if the item appears to be part of a series.

Example: Policy Report

Policy report.: Multilingual children: Beyond myths and towards best practices
Research output: Book/Report > Other report

Please also refer to pages 12-17, “Editing Publications,” for additional editorial assistance
4. Create and Edit a CV

NYU Scholars allows you to create and manage a personal, public and NIH Biosketch CVs.
Begin by clicking the green ‘add new’ button and choose ‘Curriculum vitae’ in the left navigation bar. After clicking ‘Curriculum vitae’, choose a CV template:

Designate an owner of the CV – a profiled faculty member:

After choosing an owner, decide which sections to add to the CV. Click ‘create’. Once created, hovering over individual sections will allow user to edit as desired. Always ‘save,’ lower left.
Features of CV functionality in NYU Scholars:

- CV can be personalized by adding, removing, and editing various sections.
- CV can be published to the public portal.
- CV is downloadable as a Word file or PDF format.
- Once a user creates a CV, it can be accessed by selecting “Curriculum vitae” from the user’s NYU Scholars left-hand navigation bar.
5. Public Portal

The portal is the public-facing web site of NYU Scholars. Some information – such as publication items and public CVs – that are included in NYU Scholars personal profiles will display in the portal, and can be accessed by others to further research and collaboration efforts.

For direct access to the portal:
https://nyuscholars.nyu.edu
The NYU Scholars public portal allows scholars as well as journalists, donors, and policymakers to find NYU faculty members who are working at the forefront.
Features of a user profile within the NYU Scholars public portal include:

- The “fingerprint” section of a profile mines the text of the faculty’s publication and other sources to create an index of weighted terms.

- “Research output” displays the faculty’s publication list, including Altmetrics on social media attention.

- “Similar experts” displays a list of faculty who publish on overlapping concepts based on fingerprints.

- “Network” allows the user to see internal and external collaborations with customizable viewing options.

- The user can also view his/her Scopus profile to set-up Scopus citation alerts.

If further assistance is needed, contact the NYU Scholars project team at: NYUScholars@nyu.edu