Guide to eStaffProfile (eSP) and CMS staff profiles

Contents

1. **Introduction to eSP and CMS website staff pages** 3
   1.1. Accessing and logging on to eSP 3
   1.2. eSP menu system 4

2. **Staff listing page in CMS** 5
   2.1. Contact Details 6
   2.2. Professional summaries 8
   2.3. Research summaries 8
   2.4. Research supervisees 8
   2.5. Teaching Summaries 9
   2.6. Other Interests 9
   2.7. Free text tab 9
   2.8. University membership 10
   2.9. Allocating yourself to the appropriate staff category 10
   2.10. Qualifications 11
   2.11. Professional membership 11
   2.12. Esteem indicators 11
   2.13. Event attendance 12
   2.14. U-Now 12

3. **Publications** 12
   3.1. View Publications 12
   3.2. Add Publications 13
   3.3. Select Publications 15

4. **Queries and support** 15
   4.1. FAQ 15
5. **Admin**

5.1. Bulk Update  
5.2. Pending Membership Requests  
5.3. Group Admin  
5.4. Pending Role Requests (System Administrators Only)  
5.5. System User Admin (System Administrators Only)  
5.6. Bibliographic Validator Admin (System Administrators Only)  
5.7. Role Admin  
5.8. Group Type Admin  
5.9. Non-Staff User Admin  
5.10. Non-Staff User Type Admin  
5.11. Site Admin  
5.12. FAQ
1. Introduction to eSP and CMS website staff pages

All HR recognised members of staff, and post-graduate research students, have access to eStaffProfile. This means you can edit your own personal eSP information.

Information from eSP may be used on your staff profile page on the University website. This depends on whether or not the school/department are using the CMS for their staff listings, and if the user has one of the roles configured to be displayed.

1.1. Accessing and logging on to eSP

You can access eStaffProfile in two ways:

1. through the **UoN intranet portal**.

   To access eStaffProfile follow the link to the intranet portal from the quick links dropdown menu on the home page of the University website or visit [http://my.nottingham.ac.uk](http://my.nottingham.ac.uk). Sign in using your workstation login then click on the ‘Me’ tab. Launch eStaffProfile.

2. through [http://estaffprofile.nottingham.ac.uk](http://estaffprofile.nottingham.ac.uk)

The eStaffProfile login page looks like this:

![eStaffProfile login page](image)

3. to login, enter your **workstation login and password** if you are a member of staff or a PGR student, or enter your non-staff username (which will be an email address) and the password that was emailed to you when the account was created.
1.2. eSP menu system

The eSP menu system looks like this:

[Diagram of eSP menu system]

**Profile:**
The large clickable button on this page indicates the areas of eSP that have a bearing on your University staff listing.

**Publications:**
The large clickable button for Publications is where you can manage all your publications.

The globe means that information will be public and displayed on the University website. Where all of the information on a page will be published, the icon is displayed once at the top of the page. Where only part of the information on the page will be published, the icon will appear next to each relevant field. Please note that information will only be published if you have allowed it to be via the Settings screen.

The “U” indicates that your U-**Now page**, if you have one, will be populated with this information. U-Now is The University of Nottingham’s collection of open educational materials which have been uploaded to the web for anyone to use. The materials range from complete modules to smaller scale learning objects and highlight a range of teaching and learning activities from across the University. There are no assessments and no credits awarded but U-Now provides an opportunity to browse or download material and learn more about a familiar subject or a new topic. Where all of the information on a page will be published, the icon is displayed once at the top of the page. Where only part of the information on the page will be published, the icon will appear next to each relevant field. Please note that information will only be published if you have allowed it to be via the Settings screen.

**Formatting your text in CMS**

For consistency in style it is recommended that you write your personal information in the third person. If you jump between the first and third person it will look inconsistent on your personal details page.
2. Staff listing page in CMS

The information in a School/Department staff listing on the University website is pulled in from information contained in eStaffProfile. The Staff listing page looks like this:

There are tabs across the top of the page. Each tab contains the staff listing of a certain staff category:

- Academic Staff
- Research Staff
- Administrative Staff
- Technical Staff.

To assign yourself to the correct category you will have to make sure certain information is entered correctly into your eSP. To allocate yourself to the correct staff category you will need to ensure you are a member of the appropriate role for the group on the University Memberships page.

Teaching and Research summaries: The information on your Teaching and Research summaries within the Personal Details page is pulled in from the Teaching interests and Research Summaries areas in your eSP. You have the option of having all your research or teaching and learning information on your Personal Details tab or you can have a summary of a couple of lines with a link to a Teaching and Learning and Research tab where your full information will display.
If you choose to have a summary with link to full information, you will need to format your text to ensure that your summary and tab display correctly. (See 2.5 Teaching summary, 2.3 Research summary, 4. Research tab and 6. Teaching and Learning tab for full information)

Avoid using chunks of text: Web users scan text rather than reading in a linear fashion. Therefore it is important to break up text with subheadings and use bullets wherever possible.

2.1. Contact Details
This first page of a person’s staff profile is the Contact Details tab. It holds the details shown in the example opposite.

Please note: When you make any changes to your eSP it can take overnight to show up on the website.

Only members of staff on the HR database, or postgraduate research students, will have an eSP profile, e.g. if you are a visiting professor you would have to contact the IS helpline to be added.

Your surname and forename information on your staff profile is pulled directly from the information contained in your Personal page in eSP. These fields are greyed out and you will be unable to edit them. This is because the information in these fields is pulled in from the central HR database.
Overriding official HR forename
If you would rather be known as something other than your forename, for example ‘Jon’ instead of ‘Jonathan’ you can do this by completing the ‘Forename(s) Known As’ field.

If this information is incorrect you must contact HR to get the information changed.

Job title and contact information
Your job title and your contact information is pulled in from the Profile > Contact Details page in eSP.

Your HR Job Description will appear as your job title on your staff profile by default. If you need to change this you can do so by filling in the Job Description field. For example, you may not wish to just be known as a Lecturer, but as a Lecturer of Philosophy.

Note: if you also have a university personal website this can be added to your contact information. You will have to enter the appropriate field on the Contact Details > Personal page in eSP.
2.2. Professional summaries
These five boxes allow you to add extra information about yourself.

N.B. When you add or change information, you must remember to save it at the bottom of the page.

Biography
The biography information on your Personal details page, should be entered in Professional Summaries

Expertise Summary
You can enter your Expertise Summary here on this page.
You can fill out the following spaces, but they will not be shown on the University website

Lay Summary
This section will not display on the website.

Media Summary
This section will not display on the website.

Personal Keywords
This section will not display on the website.

N.B. As above: Do not forget to save your work at the bottom of the page!

2.3. Research summaries
The Research summary on your Personal details page is taken from the first couple of sentences entered into Research Interests > Research Summaries.
There are three boxes listed: Current Research, Future Research and Past Research.

N.B. Remember to tick the Research Active page.

If you want a brief summary of your research with a link to a Research tab you will need to write at least 200 characters in your opening paragraph.
If you write less than 200 characters your research information will show in its entirety on your Personal Details tab and you will not have a Research tab.

2.4. Research supervisees
This space will include details about the Research Students involved in your work.
It is currently unavailable.
2.5. Teaching Summaries
The teaching summary on your Personal Details page on the University (CMS) website is taken from the Teaching Summaries page. This page will publicise your past experience.

N.B. When you add or change information, you must remember to save it at the bottom of the page.

Teaching and Learning Interests
If you want a brief summary of your teaching and learning interests with a link to a Teaching and Learning tab you will need to write at least 200 characters in your opening paragraph. If you write less than 200 characters your teaching information will show in its entirety on your Personal Details tab and you will not have a Teaching and Learning tab visible. See example below:

2.6. Other Interests
This page is not visible on the University website.

2.7. Free text tab
The free text tab should ideally be used to highlight key areas of your work such as administrative roles, research opportunities or past/future conferences, but you are free to type anything you wish in this space.
2.8. University membership

All Standard users can enter their own information on this page or ask their School eSP Controller or School System Administrator to Impersonate them and enter the details for them. Remember that all users must initially log into their own accounts so that their eStaffProfile accounts can be activated.

A Standard User is an individual who is managing their own eSP.

2.9. Allocating yourself to the appropriate staff category

Standard User

There are two fields where you will need to add information in the University Groups page: Group and Role Within Group.

1. First, select your ‘Group’ from the dropdown menu
2. Choose your ‘Role’ from the dropdown menu and then ‘Request Membership’.

You can add more groups and roles by repeating the process. Once you have entered this information you will appear on the correct staff listing tab on your website’s staff listings page. You will have a primary Group listing, which is dictated by IDM.

Should you decide to delete a membership it will no longer appear on the University website under staff listings.

See diagram opposite:
It is the same process for adding details for **Institutes** and **Research Priority Groups**.

Your membership requests will be forwarded to the Group Controller or System Administrator (see below) for action. But this will only happen where the group has a controller. Otherwise it is approved immediately.

**System Administrator**
A System Administrator has full control over the system, including (but not limited to) creating, updating and deleting non-staff users, groups and roles. System Administrators can impersonate any member of staff and manage their eSP, including Publications.

**Group Controller**
School and Department Group Controllers can impersonate any member of staff who is in the Group they control. Group Controllers can also create other Group Controllers.

**2.10. Qualifications**
You can list any other qualifications and language skills that you may have, here in this space.

**2.11. Professional membership**
You can add as many Professional Memberships here as you wish and then also delete them when you need to.

**2.12. Esteem indicators**
Choose from the dropdown list, enter Funder name, and choose Status. This can be either Achieved or Planning. Then choose a start and end date and click **Create New Esteem Indicator**.
2.13. Event attendance
If you have attended any important career events, then you can list them here.

2.14. U-Now
As described in the section eSP Menu systems.

3. Publications

The Publications on your People page are pulled in from this section of eStaffProfile.

On the Home page, click on the large Publications button.

The three options listed here are to:

- View Publications
- Add Publications
- Select Publications

3.1. View Publications
Clicking on this tab will allow you to put your publications in order by:
- First Author
- Year
- Publication Type.
You will also be able to filter your publications by adding or removing from selections. From this page you will be able to review, edit and remove any publications on your list.

Citation counts from Scopus and Web of Science are automatically displayed for each publication, when available (they will be available much more commonly in some subject areas than in others). A tutorial, Finding the impact of your published work using bibliometrics, has been produced to help those who would like to learn more about citation data and bibliometrics.

### 3.2. Add Publications

You can add publications one at a time, or in a batch as a file from EndNote or BibTeX.

The easiest way to add publications one at a time is to import the details, if available, from one of the following sources:

- **eStaffProfile**: Publications which have already been entered into the system
- **UNLOC**: Books held within University of Nottingham libraries (UK Campus)
- **Pubmed**: Journal articles in the biomedical sciences.
- **Web of Science**: Journal articles and conference proceedings for all subjects.

#### Option 1: Searching

**Step 1:** Add **Author Name**, **Title** and **Year** into the relevant fields, tick the **Checkbox** for the source where the publication is held and click **Search**. Be sure to type in the document details exactly as you would expect to find them. If you don’t get the results you were expecting, try searching for only keywords within the title.

**Step 2:** When you have located your publication, click **Add** to import the data.
Option 2: Uploading a File

You can also upload records of publications as a file from EndNote or BibTeX.

**Step 1:** Select the source in the **File Format** box, and **Browse** to your file. Click **Upload**.

**Step 2:** When you have located your publication, click **Add** to import the data.

To create an EndNote XML export of your publications, in EndNote:

**Step 1:** Go to **File** then **Export**

**Step 2:** Select XML (*.xml) in the **Save As** type drop-down

**Step 3:** Uncheck the **Export Selected References** box (if you wish to export your whole EndNote library). Click **Save**.

Option 3: Manually Adding a Publication

If you don't find your publication in the sources mentioned above, you can input all the required information manually. At the bottom of the page, you will find the **Enter a Publication Manually** button to open the template.

To see the results of importing, uploading or manual input, go to **View Publications**, where you can use the **Edit** function to make any amendments which may be necessary.

Try to fill out as much information on the form as you can. Note that the **New Author** (or Editor) **Name** box is at the foot of the page.

You will need to click **Save Changes** at the foot of the editing screen when you have completed the form.
3.3. Select Publications

You can choose particular publications to appear as a **Selected Publications** list in the **Personal Details** Tab on your People page.

Click on **Add to selection** to select publications for this list. Once you have selected more than one, up and down arrows are available to sort this list into the order you prefer.

If you have not selected any specific publications in the database then CMS will pull in those most recently added.

The **Selected Publications** section will not appear on your personal details page if you do not have any publications entered in the publications database.

4. Queries and support

4.1. FAQ

Should you encounter any problems, you may find the answer you were looking for in the **Frequently Asked Questions** section. This contains a short list of popular questions and their solutions.

If you have any further queries regarding eStaffProfile or your staff listing on the University website please contact your School or Department’s eStaffProfile Administrator in the first instance.

If you require further assistance please contact the Staff IT Helpline:

- **telephone:** (int) 16677
- **email:** Staff-IT-Helpline
5. Admin

If you are a Group Controller or System Administrator, you will locate the Admin tab at the top of your screen.

Click on to the Admin button and you will be presented with the following screen:

All of the Admin tasks will be performed by using the sidebar menu on the right hand side.
5.1. Bulk Update
The Bulk Update page allows you to assign a number of people to a group at once.

In order to Search, enter part of a person’s name, their user name or their unique identifier (employee number, student number) into the Search Term field.

The results can be filtered by selecting a group under Search Group. Alternatively, you can leave the Search Term empty and just select a group in order to return all members of that group.

You can add all of the search results to the bulk update list at once by clicking Add All and you can remove all users from the bulk update list by clicking Remove All.

Assign Group
Once you’ve created your bulk update list, select a Group, select a Role and click Bulk Assign.

5.2. Pending Membership Requests

Group Controllers:
Group Controllers can create other Group Controllers. Group Controllers can only create, edit and delete people in the groups they are responsible for.

This page displays a list of all pending membership requests for those groups.

System Administrators:
Systems Administrators are located through IS Helpdesk staff only.

This page displays a list of ALL pending membership requests for ALL groups. Please only make changes if a Group Controller asks you to, or if there is another reason that the Group Controller can’t use the system.

To approve or reject a request click the Approve or Reject button next the user’s name, then click OK to confirm the change. If rejecting, then enter a reason for the rejection and click OK.

You can use the arrows to navigate through the list and also display up to forty names on each screen.

5.3. Group Admin

Creating a New Group
To create a new group, click on the Create New Group button.

Editing a Group
To edit a group, locate it within the list of groups and click on its name. When searching for groups, enter the group name in the search box. Do not press Clear. The name of the group will always appear underneath the search box, if it is there. Press Clear to clear the search box and search for another group.
Groups Without Controllers
This list shows all groups that do not yet have a controller assigned.
By clicking on the individual Groups you can add Controllers and Non Primary Members to various groups and you can also add new roles here.

5.4. Pending Role Requests (System Administrators Only)
When a group controller requests a new role, which doesn’t already exist within eStaffProfile for their group it will appear here.
To approve a role click the Approve button next the role description, then click OK to confirm the change.
To reject a role click the Reject button next the role description, enter a reason for the rejection and click OK.

The bottom half of the screen displays a list of roles already approved. This lets the System Administrator check for existing roles which might be used instead of a new role being requested.

5.5. System User Admin (System Administrators Only)
To add a new system administrator, search for a user by entering part of their name, their user name or their unique identifier (employee number, student number, associate ID) into the search term field and clicking Search.
Once you have located the user you wish to make into a system administrator, click their Make System Administrator button.
To remove a System Administrator, locate them in the list and click the Remove System Administrator button at the end of the row.
5.6. Bibliographic Validator Admin (System Administrators Only)

Bibliographic Validators are a very restricted subset of users whose role it is to validate the bibliographic details of publications.

To add a new bibliographic validator, search for a user by entering part of their name, user name or their unique identifier (employee number, student number) into the search term field and clicking **Search**.

![Bibliographic Validator Admin](image)

Once you have located the user you wish to make into a validator, click the **Make Bibliographic Validator** button at the end of the row.

In order to remove a validator, locate them in the list and click the **Remove Bibliographic Validator** button.

5.7. Role Admin

To add a role, enter the name of the role in the text box and click **Create New Role** and in order to delete a role, locate it in the list and click the **Delete** button at the end of the row. Roles which still have users assigned to them cannot be deleted.

![Role Administration](image)
To edit the name of a role, click the **Edit** button, update the value in the text box and click **Save Role**.

When searching for existing roles, enter the role name in the search box. Do not press Clear. The name of the role will always appear underneath the search box, if it is there. Press **Clear** to clear the search box and search for another role.

### 5.8. Group Type Admin

To add a group type, enter the name of the group type in the text box and click **Create New Group Type**.

To delete a group type, locate it in the list and click the **Delete** button at the end of the row. When searching for existing group types, enter the group type name in the search box. Do not press Clear. The name of the group type will always appear underneath the search box, if it is there. Press **Clear** to clear the search box and search for another group type.

To edit the name of a group type, click the **Edit** button, update the value in the text box and click **Save Group Type**.

### 5.9. Non-Staff User Admin

To create a new non-staff user, click **Create Non-Staff User**.

Select a user type from the drop down list and fill out the rest of their details. Click **Create New Non-Staff User**.
To edit an existing non-staff user, locate them in the list and click on their name to highlight it. When searching for non-staff users, enter the non-staff user name in the search box. Do not press Clear. The name of the non-staff user will always appear underneath the search box, if it is there. Press Clear to clear the search box and search for another non-staff user.

### 5.10. Non-Staff User Type Admin

To add a non-staff user type, enter the name of the non-staff user type in the text box and click **Create New Non-Staff User Type**.

To delete a non-staff user type, locate it in the list and click the **Delete** button at the end of the row.

To edit the name of a non-staff user type, click the **Edit** button at the end of the row, update the value in the text box and click **Save Non-Staff User Type**.

When searching for non-staff user types, enter the existing non-staff user type name in the search box. Do not press Clear. The name of the non-staff user type will always appear underneath the search box, if it is there. Press Clear to clear the search box and search for another non-staff user type.

### 5.11. Site Admin

To add a site, select a Country, enter a name and enter the address HTML then click **Create New Site**.

To delete a site, locate it in the list and click the **Delete** button.

To edit a site, click the **Edit** button at the end of the row, update the values in the form and click **Save Site**.
5.12. FAQ
The two most frequently asked questions are **What is a Group Controller?** and **What is a System Administrator?** and you can find both definitions in this section along with our contact details:

If you experience problems using this system please contact the Staff IT Helpline.

- **telephone:** (int) 16677
- **email:** Staff-IT-Helpline