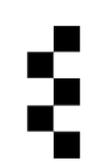




RIS Upgrade

What's new?

September 2022



In September 2022 the [RIS](#) will be upgraded to a more recent version the software platform.

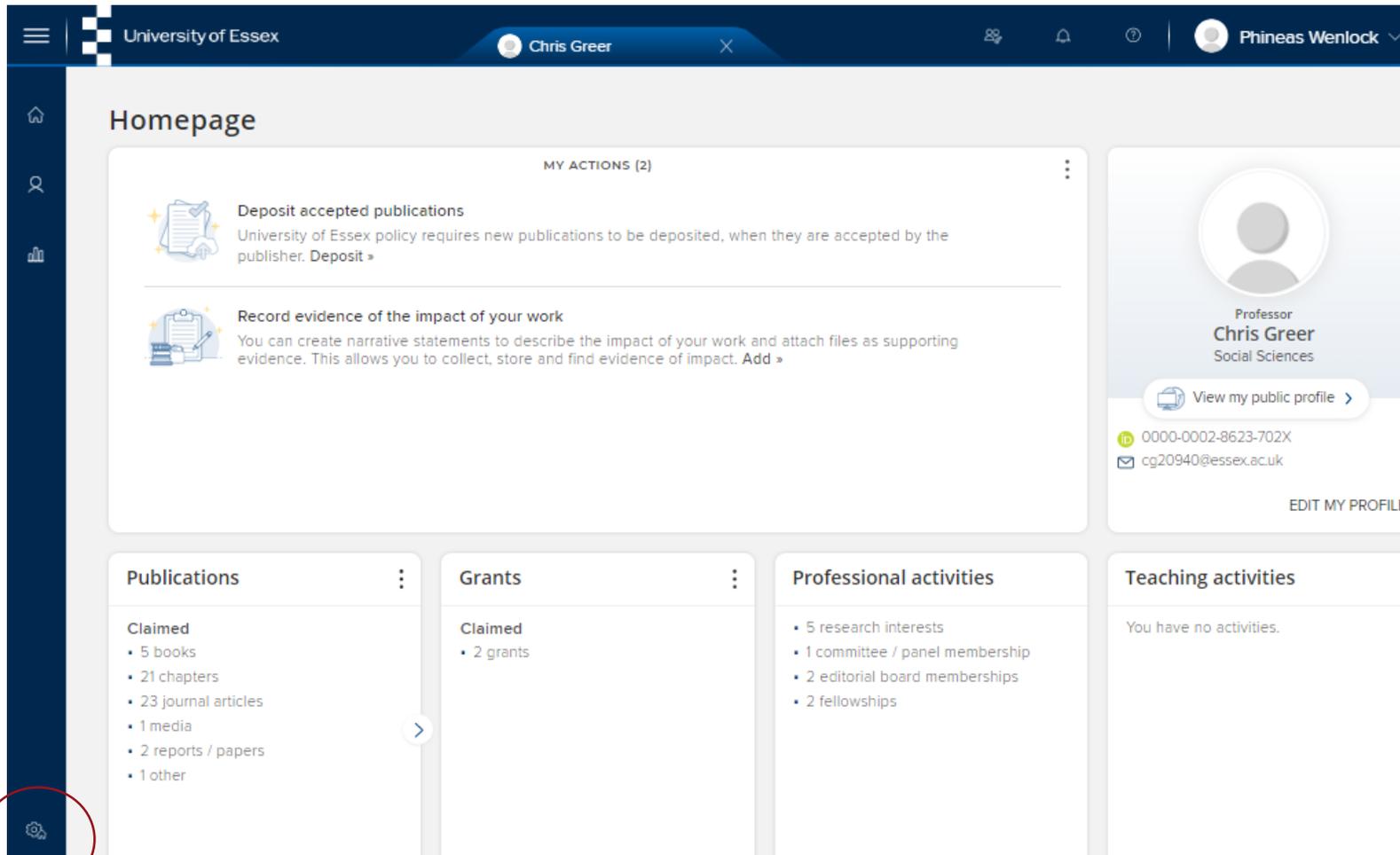
Things will look a little different and some menu items will change but the core functionality remains the same, so you should get used to it fairly quickly.

The key changes are summarised in this document. The guides to various part of the system will updated and will available in the RIS Help or on the [staff portal](#).

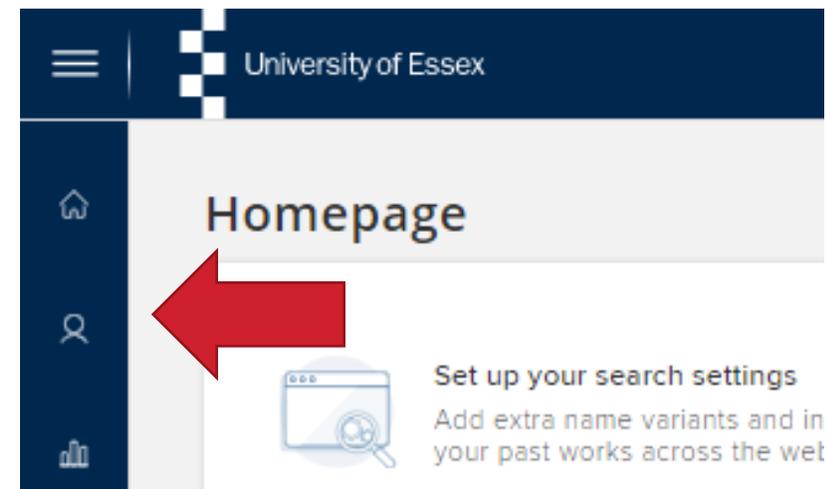
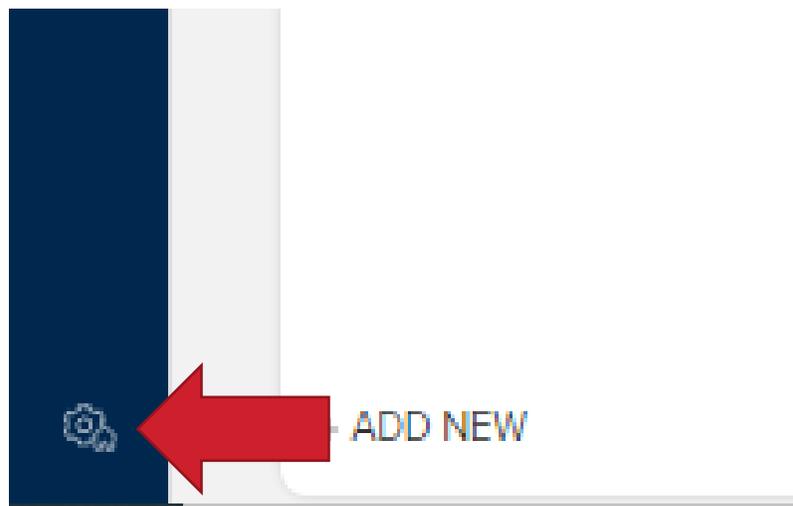
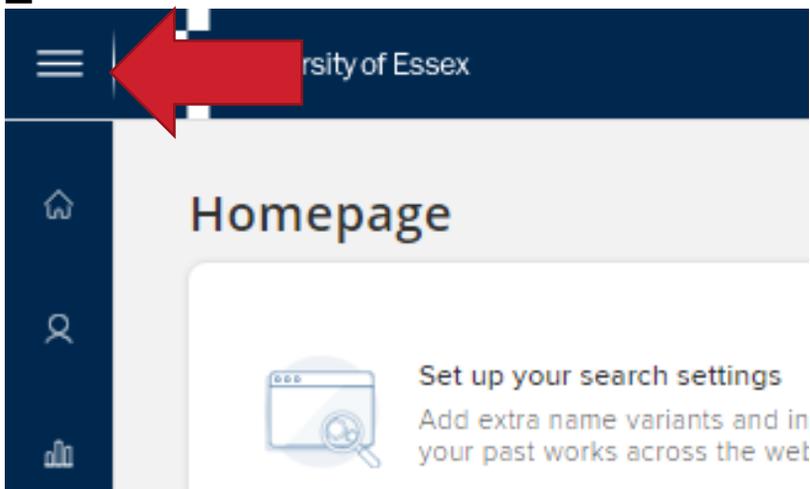
Homepage

The layout and look of the homepage has been redesigned to create an action-oriented dashboard.

The new homepage features configurable 'tiles' and you can choose which tiles are displayed on your homepage.



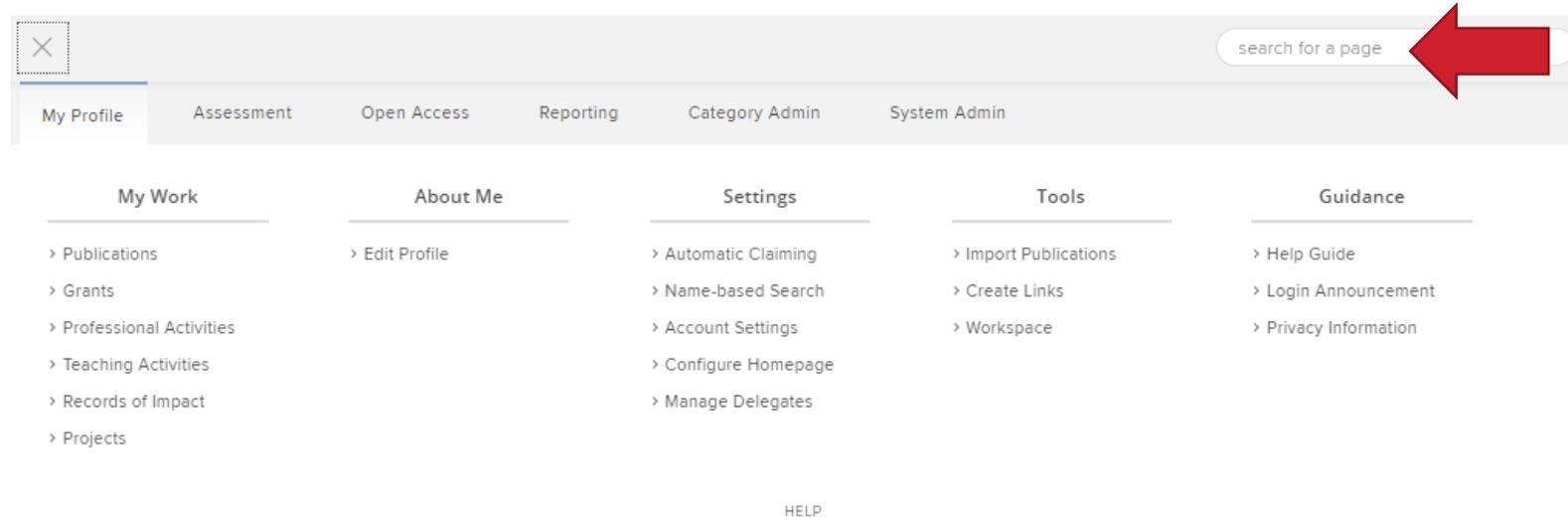
Click here to configure the tiles



Access the Menu using the Menu button top left

Edit your homepage using the Configure Homepage button bottom left

Links to home, your profile and the Reporting Hub can also be found on the left hand bar



Menu

The main menu structure of the RIS has been redesigned to focus on key uses.

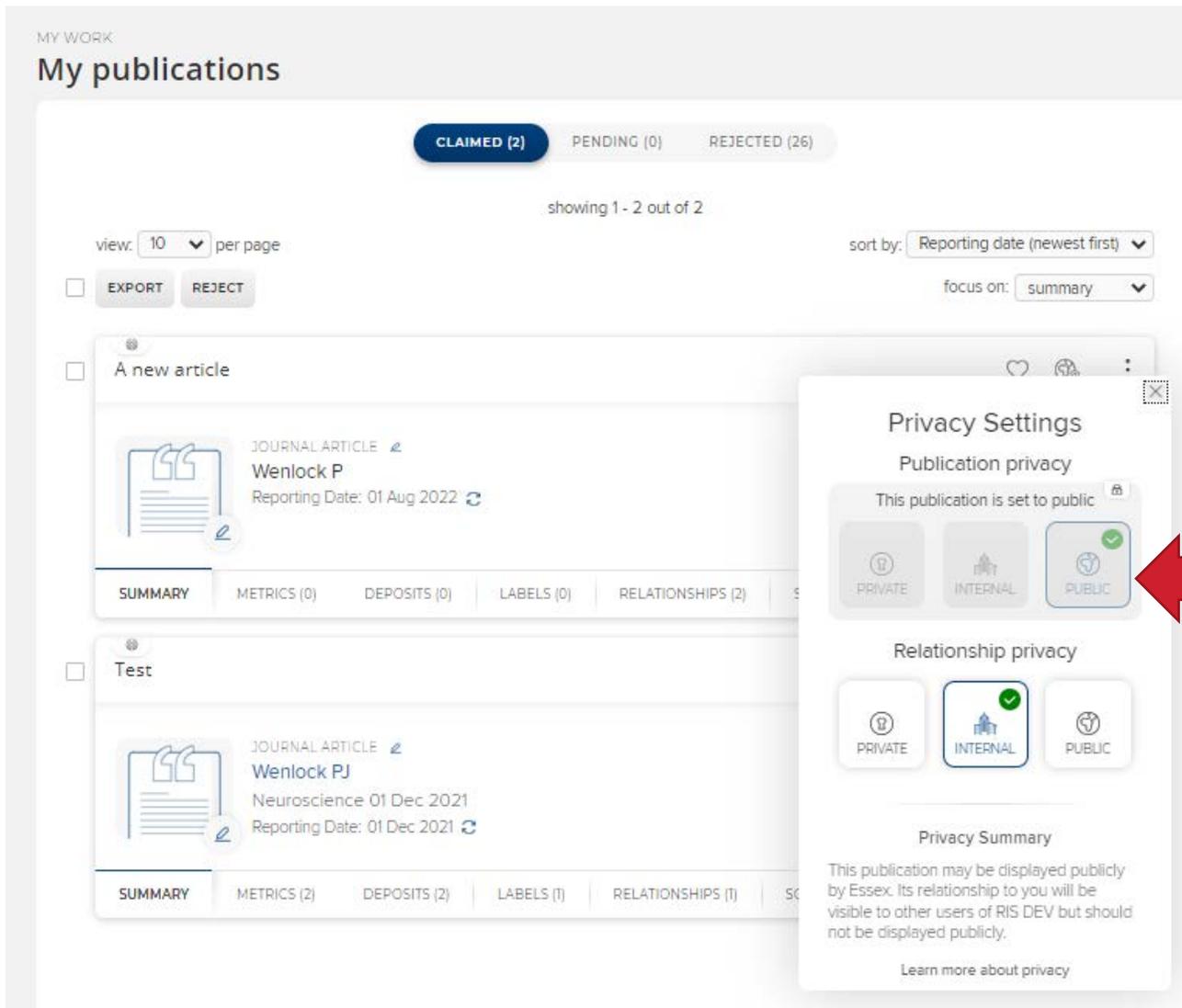
You may find that some menu items have moved to a new section.

A new 'search' functionality has been introduced, allowing the menu to be browsed more easily.

Privacy

The upgrade introduces a more extensive privacy framework to allow the RIS to support a greater range of data types, including more sensitive data types.

The concept of **Object Privacy** has been introduced to provide fine grained control over data access for both the institution and researchers. In most cases the Object Privacy of a data type is set by Essex.



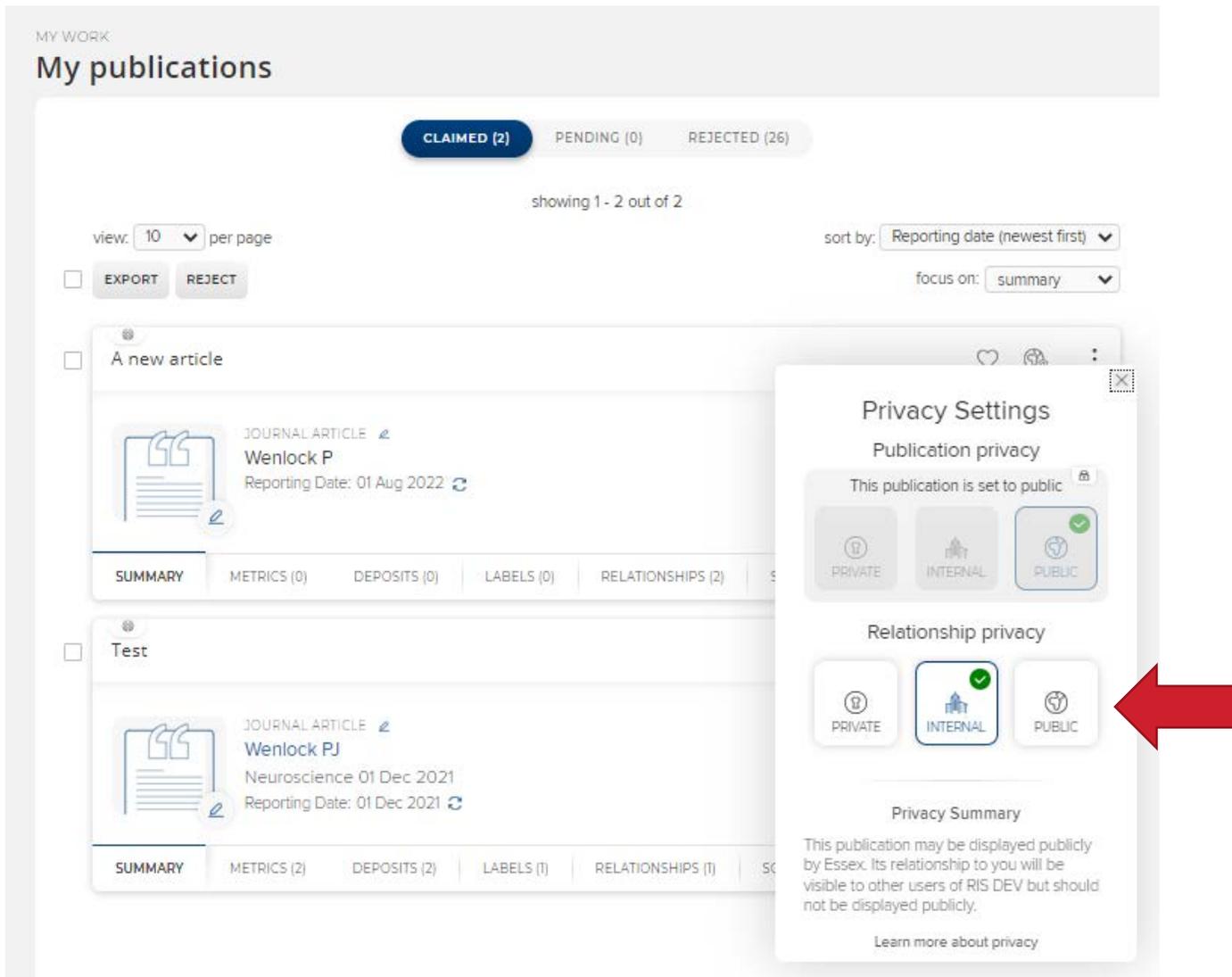
The screenshot shows the 'My publications' page in the RIS system. At the top, there are filters for 'CLAIMED (2)', 'PENDING (0)', and 'REJECTED (26)'. Below this, there are options for 'view: 10 per page', 'sort by: Reporting date (newest first)', and 'focus on: summary'. The main content area displays two publications. The first is 'A new article' by Wenlock P, reporting date 01 Aug 2022. The second is 'Test' by Wenlock PJ, reporting date 01 Dec 2021. A 'Privacy Settings' modal is open over the first publication, showing 'Publication privacy' set to 'PUBLIC' (indicated by a green checkmark) and 'Relationship privacy' set to 'INTERNAL' (indicated by a green checkmark). A red arrow points to the 'PUBLIC' option in the 'Publication privacy' section. The modal also includes a 'Privacy Summary' section stating: 'This publication may be displayed publicly by Essex. Its relationship to you will be visible to other users of RIS DEV but should not be displayed publicly.' and a link to 'Learn more about privacy'.

Privacy

Relationship privacy allows you to manage the visibility of your relationships with an object. This replaces the 'eye' visibility icon in the old version.

Marking a relationship as private does not affect the visibility of an object in the RIS. Objects with relationships marked as private may still be visible but your relationship with the object will not be displayed (e.g. a publication might still be sent to a co-authors public profile but it will not appear on your profile).

Relationship privacy is managed independently from object privacy. However, relationship privacy level is linked intrinsically to the object. If the object you are linked to has a more restrictive privacy level than your chosen relationship privacy setting, the system will automatically calculate an effective privacy setting aligned to the more restrictive level.

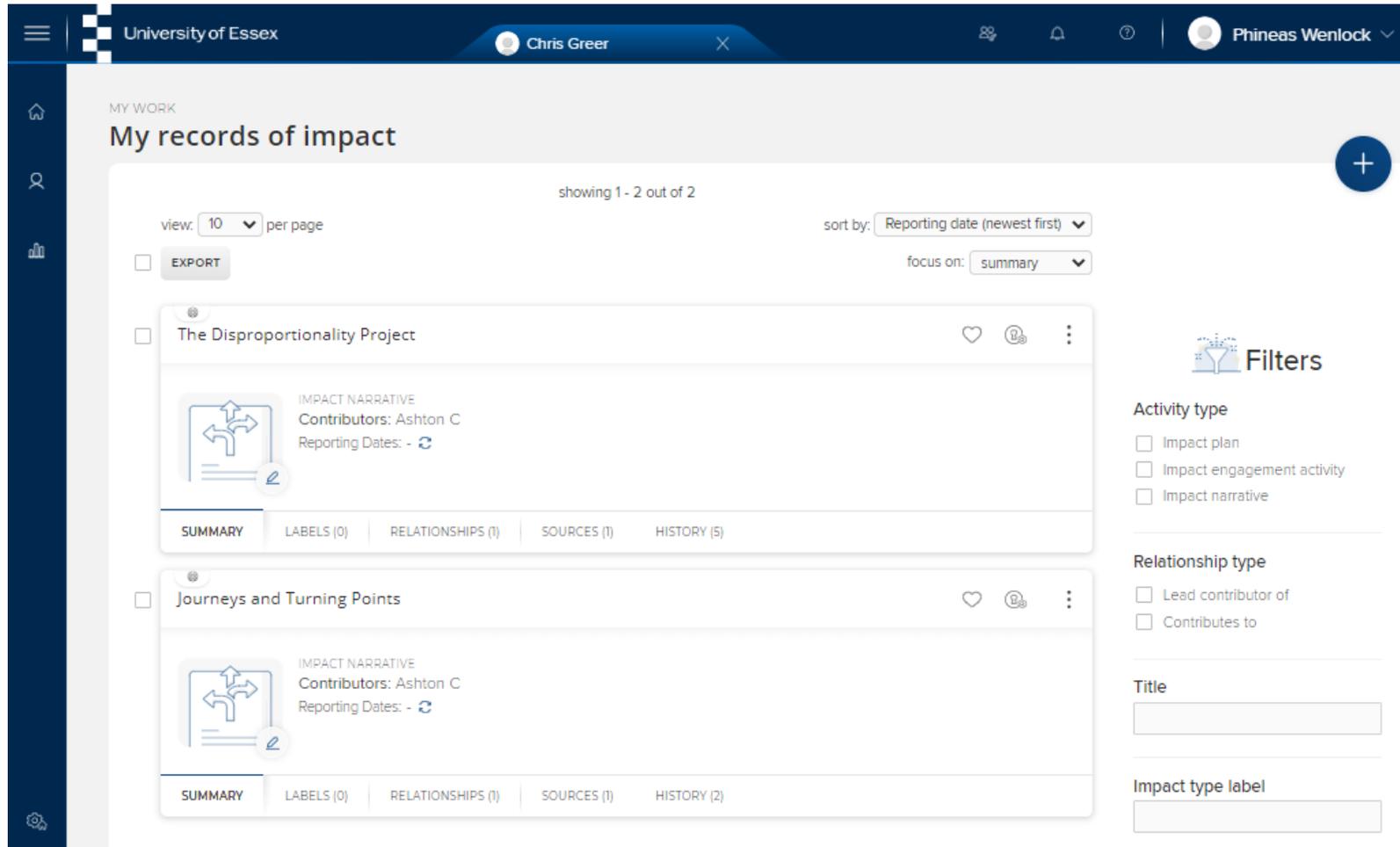


The screenshot shows the 'My publications' interface with a 'Privacy Settings' modal open. The modal is titled 'Privacy Settings' and is divided into two sections: 'Publication privacy' and 'Relationship privacy'. In the 'Publication privacy' section, the current setting is 'PUBLIC' (indicated by a green checkmark). In the 'Relationship privacy' section, the 'INTERNAL' setting is selected (indicated by a green checkmark). A red arrow points to the 'INTERNAL' button in the 'Relationship privacy' section. Below the settings, there is a 'Privacy Summary' section with the text: 'This publication may be displayed publicly by Essex. Its relationship to you will be visible to other users of RIS DEV but should not be displayed publicly.' and a link to 'Learn more about privacy'.

Impact

The way we record Impact has been improved to collect greater detail and align with the [Essex Impact Toolkit](#).

A new guide for Impact has been created by the REO Impact Team. You will find it via the RIS Help menu or on the [staff portal](#) once the upgrade is complete.



The screenshot displays the 'My records of impact' interface. At the top, it shows the user's name 'Chris Greer' and 'Phineas Wenlock'. The main content area lists two impact records:

- The Disproportionality Project**: IMPACT NARRATIVE, Contributors: Ashton C, Reporting Dates: - [refresh]. Summary view selected. Labels: 0, Relationships: 1, Sources: 1, History: 5.
- Journeys and Turning Points**: IMPACT NARRATIVE, Contributors: Ashton C, Reporting Dates: - [refresh]. Summary view selected. Labels: 0, Relationships: 1, Sources: 1, History: 2.

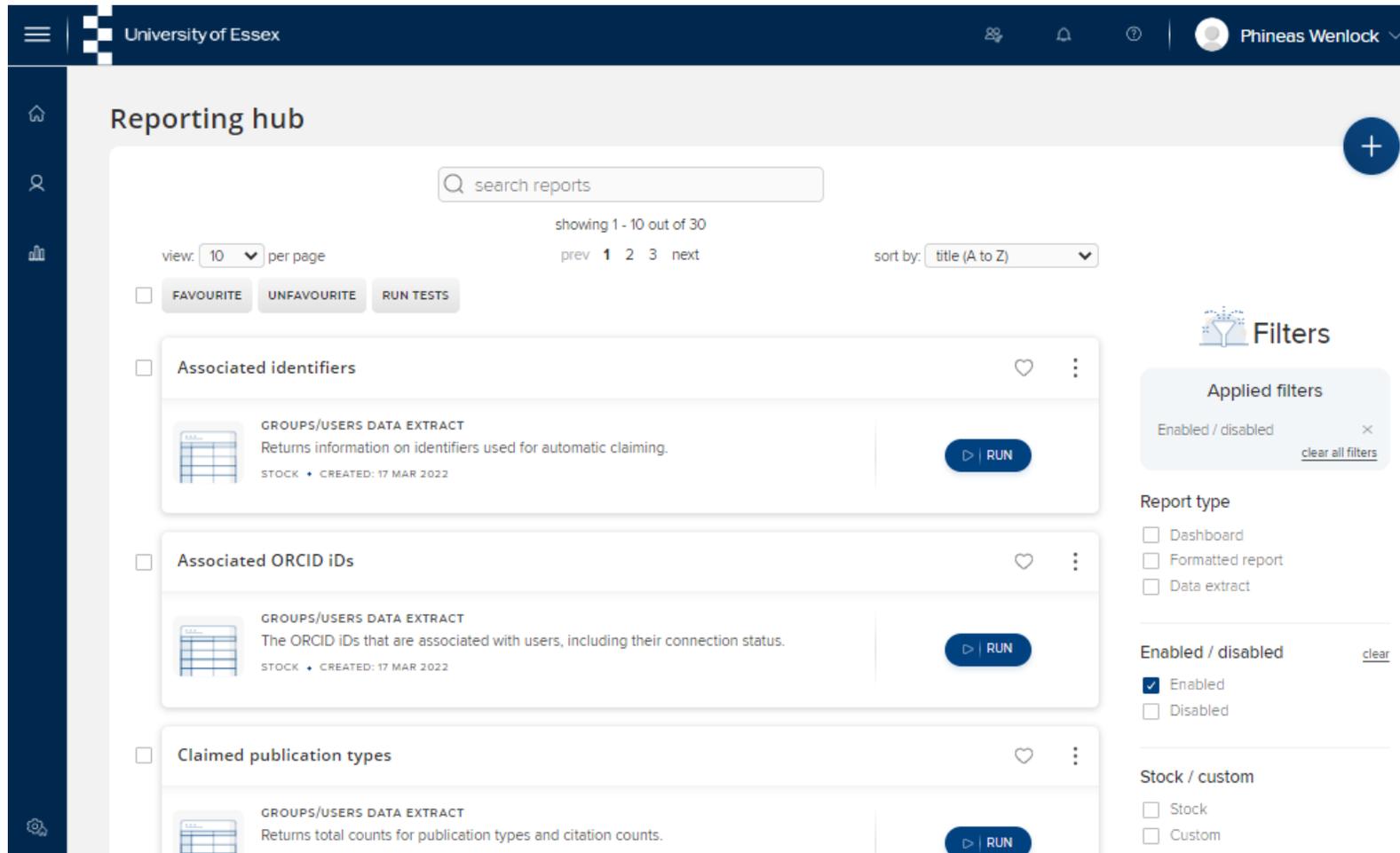
On the right, the 'Filters' section includes:

- Activity type**: Impact plan, Impact engagement activity, Impact narrative.
- Relationship type**: Lead contributor of, Contributes to.
- Title**: [input field]
- Impact type label**: [input field]

Reports

The Reporting Hub is now the central home for reporting within the RIS.

If your role involves running reports from the RIS, the Reporting Hub now contains dashboards, a range of formatted reports and data extracts.



The screenshot shows the 'Reporting hub' interface. At the top, there is a search bar labeled 'search reports'. Below it, navigation controls include 'view: 10 per page', 'showing 1 - 10 out of 30', and 'sort by: title (A to Z)'. There are three tabs: 'FAVOURITE', 'UNFAVOURITE', and 'RUN TESTS'. The main content area displays three report cards, each with a 'GROUPS/USERS DATA EXTRACT' icon and a 'RUN' button. The first report is 'Associated identifiers' with the description 'Returns information on identifiers used for automatic claiming.' The second is 'Associated ORCID iDs' with 'The ORCID iDs that are associated with users, including their connection status.' The third is 'Claimed publication types' with 'Returns total counts for publication types and citation counts.' On the right side, there is a 'Filters' panel with sections for 'Applied filters', 'Report type' (Dashboard, Formatted report, Data extract), 'Enabled / disabled' (Enabled, Disabled), and 'Stock / custom' (Stock, Custom).



Need help?

Contact REO Research Systems

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