Esploro Essentials: Entities

Projects

A Project is a way to display ongoing research work. It can have multiple researchers and departments as members, and it can be related to outputs and grants.

To search for Projects, visitors enter a search term and select the Projects scope. The search results give us some information about each project. This display can be configured, as we will see later.

Click a title to see the full-page view of the project. This can also be configured. Click a researcher’s name to open their profile. As you can see, a researcher’s projects are also visible on their profile.

Projects can be added and edited from the Research Hub or from a researcher’s profile.

To work with projects in the Hub, you must have the Projects Manager role.

Open the Research Management menu and select Manage Projects.

Here you see the list of all projects. In the first column, you see the name and other identifying information, along with whether it is active or not. The second column shows the start and end date. The next column shows the number of members. Members are researchers and organizations that are associated with this project.

You can limit the list with the facets pane. You can also search for projects with the persistent search bar, limiting the results by criteria such as keywords or members.

Select a project to see the details in a new pane on the right. Scroll down to see all the information. You can edit or add to all of the information here.

Let’s create a new project and take a closer look at each of the fields. Select Add Project. The title is required. The Project ID is optional. If you do not provide one, an ID will be generated automatically.

Select this pencil icon to edit and add to the project summary. Then Save.

The next section is Visibility approval. When you are ready to make the project public, approve it separately for the researcher profiles and for the research portal.

Attributes are tags that you can add to a project, for example: Third-party funded or international cooperation. These can be configured to meet your needs.

Next, Add member researchers. Select Search existing for a researcher already in your Esploro system. This could be an affiliated or a non-affiliated researcher. Add their name. Specify their role in the project. Enter start and end dates, if applicable. Active means currently involved in the project. Display in Profile controls whether this project is shown on the profile of that researcher. Of course, this is only relevant if the project is approved in general for display in researcher profiles. Click Save.

To add a researcher who is not yet in your Esploro system, Create a non-affiliated researcher. The process is basically the same.

Use these arrows to scroll through the member researchers.

Next add Organizations. These can be internal, such as departments within your institution, or external, such as partnerships with other universities.

Next, add important dates. For each date that you add, select a date type, such as funding date or expected start date. Any dates that you add will be displayed on a timeline.

Subjects and Keywords work the same way as for other Esploro entities. Subjects are selected from a closed list, while Keywords can be anything.

Your changes are saved as you work on each section.

If you want to configure some of the options, go to the Configuration dashboard with this gear icon. Open the Research Administration menu. Under Projects, let’s select for example, Research Project Types. Here you can edit the available options, as well as add a new one. Go to Configuration > Portal and Profiles to configure the display of projects, both on the search results page and on the full project details page. Here you can select which sections to display and in what order.

Researchers can also add their own projects from their profiles. For a demonstration, see the video for researchers: How to Add and Edit Projects and Activities on your Profile.

Projects are an additional way to store, track, and showcase research activity at your institution.