

Introduction to ETIS new version

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1. Update your CV –especially your employment information can be described in more detail. But see that the outdated information is removed.
 2. Update your authorizations (left menu > Authorizations)!
 3. You can order ETIS messages on your e-mail (My Account > check „E-mail“).
 4. You can change the layout colour of your ETIS desktop at the upper right corner of the screen (user roles in the dropdown menu > Change colour).
 5. If you get stuck, read helppages (icon  at the top right corner of the screen) or contact ETIS user help desk: etis@etag.ee.
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Old versus new in ETIS ...

Even though the visual layout of the database has changed considerably, the central logic of data processing has remained the same: user roles, data confirmation, user desktop, data publishing, filling in and submitting applications, contracts and reports. But there are new options for simplifying data management. Below we will list the main similarities and differences between ETIS1 and ETIS2.

At the same time many new features have been added:

- On user desktop, data are displayed on separate tabs (Applications, Messages, Review, etc).
- In ETIS1 data were always in edit-mode, in ETIS2 you can choose whether you want to preview data (display) or change them (edit icon ).
- In ETIS1, after saving data these proceeded automatically to the „to be confirmed“ status. In ETIS2 you should press „Send to confirmation“ (if you forget to do so, there will be a warning message). This means that you do not have to insert all the data at once, you can save some data and return to them later. Warning messages will be displayed when data fields are filled in incompletely. You cannot press „Send to confirmation“ unless all the mandatory data have been entered.
- You can login to ETIS with your Mobile-ID.
- Password reminder can be ordered to your e-mail (button „forgot password“ on the login page in Research Portal).
- If you want to get ETIS messages to your e-mail, go to My Account (left menu) and tick checkbox „e-mail“.
- In your CV, you can also add your previous names (i.e your maiden name).
- While making your CV public, bear in mind that if you select the whole block (i.e „Select all“ in the block „Publications“), then the data that are added to ETIS later will automatically be

published on your ETIS public CV and you do not have to make each new publication, project, patent or supervision publik separately.

- Publishing both CV in Estonian and CV in English is on the same tab.
- Publications can be imported from the Scopus and PubMed databases (Publications search -> Import).
- When a new publication is added to ETIS by someone else (co-author) that has your name in the „Authors“ field, you will get a message on your ETIS workdesk. Click „Yes“, and the publication will be added to your CV.
- If the publication is still „in press“, DOI or a letter of confirmation from the editor of the journal/book is mandatory. In ETIS1 you had to add the letter to the field „publication fulltext file“, in ETIS2 there are separate fields for confirmation letter versus fulltext.
- If you change data that have been confirmed, their status will change to „to be reviewed“ status and it will not be public on ETIS portal. A better way to change data is to send a message (button „Send message“) to the administrator who will change data for you.
- Data search has three steps. „Simple search“ searches all textfields, „Detailed search“ is for a more complex searches and a number of new search fields have been added compared to ETIS1. As a third step, you can also filter the search results.
- You can change the colour of your ETIS desktop at the top bar (user roles dropdown menu).
- The left menu can be packed from „>“ icon at the bottom of the menu.
- The size of the text can be changed with A+ and A- icons at the top bar.
- If you want to go to ETIS Portal, you do not have to logout from ETIS. Press „Portal“ on the the left menu. To return from Portal to ETIS, press „ETIS“ at the top bar.
- Several ETIS pages can be opened at the same time without you being logged out.
- One ETIS session is max 4 hours, i.e if you do not press any buttons during this time you will be logged out of the system and the unsaved data will be lost.
- Data have unique URL-s.
- The links to ETIS1 data are redirected to ETIS2.
- If you want to use WebApi services (for all public data), contact etis@etag.ee.
- Translation of ETIS into English is still in progress. All comments on the English field names, help pages or other translated texts are most welcome (etis@etag.ee).

ETIS user manual

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1. *Insert your e-mail (left menu > CV)!*
 2. *All ASAP information is displayed on your ETIS desktop!*
 3. *ETIS messages are displayed on your desktop, but you can also order them to your e-mail (left menu> My Account > check „E-mail“).*
 4. *Your CV will not be public on the ETIS Portal unless you publish it (left menu> CV > Publish CV).*
 5. *Data about scientific activities (publications, supervisions, patents) have to be verified by ETIS data administrators (press „Send to verification“).*
 6. *Publications can be imported from the Scopus and PubMed databases (Research > Publications > Import).*
 7. *Project information can be added to ETIS only by your institution's ETIS administrators (to contact them ... Messages > Send message > type „Institution“).*
 8. *ETIS user help desk: etis@etaq.ee, phone (+372) 7 300 373.*
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Estonian Research Information System (ETIS) collects data about Estonian research institutions and researchers working in Estonia (CVs, publications, supervisions, patents, research projects and contracts). All Estonian national research financing is processed via ETIS: researchers submit applications (and later financial or final reports) and the funding bodies process them. Science administration is paper-free, in most cases ordinary ETIS login is enough for submitting an application, but in case of some types of contracts digital signing is mandatory.

ETIS is like a cluster of smaller private databases (persons, institutions, etc), where data are cross-used. For instance, publication's data can be seen by the authors of the publication, but also by the research institutions that are linked to the publication. All public information is displayed on ETIS Portal, but after you are logged in, you can only see the data that are linked to your account.

A researcher's personal data are inserted and displayed in his/her CV and the person can choose which data to publish in ETIS Portal.

All data inserted under the left menu link „CV“ are your personal data and no-one else has access to them. Data under menus „Research“ and „Projects“ are cross-used. You can use your CV for different purposes: publish it on ETIS Portal, print it out, add it to ETIS applications (while doing so, you can choose which data to add to the application CV, i.e your CV can contain a lot more information than you show on ETIS Portal or in applications).

ETIS user account

1. After login to ETIS, it is most advisable to fill in your e-mail address in your CV. E-mails come handy for ordering password reminders or to get messages about application processes.
2. Secondly, it is advisable to choose which types of messages you want to get on your e-mail (the messages will appear on your ETIS desktop anyway).
3. You can choose the colour of your desktop on the upper left corner of the page.
4. The left menu can be packed/unpacked and many other blocks of data closed/opened from the icon „>“.
5. You can give access of your account to other ETIS users (left menu > Authorizations).

Desktop

All important information is displayed on the user desktop. Activities are sub-divided into different tabs.

1. Tab „Messages“ contains all the ETIS messages that you have received. After deleting a message, it will not show on your desktop anymore, but you can still see it on the left menu> Messages > Achives.
2. In tab „Financing“, the block „New applications“ contains links to start a new application. The block „Drafts“ contains documents (applications, reports, contracts) that you have already started to fill in or that are compulsory (i.e financial or final reports), but have not been submitted yet.
3. There are several other tabs (i.e Reviewing applications or Expertgroup activities or Data verification) but you will get separate instructions about those activities only after you have been assigned to those activities.
4. If you can see the tab „CV“, then it means that someone else has added you to their applications or contract, and you will have to add you CV to that document (tick the checkboxes and press Confirm).

Researcher's CV

Under the link „CV“, users can describe their occupations, academic degrees and other academic activities. Publications, mentorships and patents should be inserted under the left menu link „Scientific activities“. Projects are inserted only by the institution administrators, but the data are also displayed in researcher's CV.

You can publish (i.e make it public on ETIS Portal) your CV either partially or fully. And you can also print out your CV.

Data verification

Data inserted under the left menu „Scientific activities“ have to be verified by institution administrators, in order for them to be shown on ETIS Portal in publications' or supervisions' searches. In your CV, you can also show unverified data. Once you have finished inserting data, press „Send to verification“ or „Save and send to verification“.

Following statuses are in use:

- Under preparation – data have been partially inserted, but have not been sent to verification

- To be confirmed – data have been inserted and sent to verification
- Confirmed – data have been verified
- To be checked – the verifier sent data back for amendments

General principles of data insertion

1. The mandatory fields are indicated by the sign *.
2. Button „Add new“ indicates that several objects can be added, i.e links to several different institutions can be added to publication data.
3. Links to ETIS users and institutions can be described by
 - a) searching the user or institution from the database;
 - b) describing data as free text.

It is advisable to use the first option, because the data will be linked to the users/institutions ETIS account and they can also see the data in their ETIS view. The second option is meant for describing persons/institutions that do not have ETIS accounts.

User help

1. Help information of the specific page is on the upper left corner of the page under icon .
2. Field „help“ is displayed under icon „?“ next to the field. If you click on it, it will stay open.
3. Longer user manuals are under the left menu link „User manuals“.
4. ETIS user help desk: etis@etag.ee and phon +372 300 373.
5. Help messages can be sent from under the left menu link „Messages“ > Send message. You can send messages to the ETIS desktops of administrators, financiers or institution data administrators.