

eXplore – How to start

eXplore is the Current Research Information System (CRIS) of AWI. Login is immediately available to you. Therefore, please use the following link:

<https://awi.elements.symplectic.org/>

When logging in for the first time, the following steps are recommended:

Step 1 (optional): Add ORCID

Step 2: Set up search settings

Step 3: Run my searches

Step 4: Claim publications

Step 5 (optional): Automatic claiming

Step 6 (optional): Import

Step 7 (optional): Grant assignment

Step 1 (optional): Add ORCID

ORCID provides a persistent digital identifier that distinguishes you from every other researcher, thereby avoiding the incorrect assignment of publications in case of name equivalence.

- 1** For your initial login, you will be asked to add your ORCID under the section «My Actions» on your homepage.
- 2** Once you click on «Add ORCID», the ORCID website will automatically be displayed on your web browser. You can register or sign in here. By doing so, your ORCID profile will be connected with your profile on **eXplore**.

Tip: Records including a DOI in ORCID will be shown automatically on your [Mine-list](#)My publication list'. This is only relevant for records, whose DOIs have been found in one of the external bibliographic databases. If the search for a DOI entered in ORCID, in the external bibliographic databases does not yield any results, no publications will be assigned to your "Mine-list".

Tip: The library offers further [information and training](#) courses on registering for your own ORCID.

Step 2: Set up search settings

As soon as you set up your name-based search settings, metadata for publications will be imported from external bibliographic databases to **eExplore**.

- 1** Under the section **«My Profile Account ->Settings -> Name @-based search»** you will find the relevant search settings to edit your name, select data sources, and run your search.
- 2** **Edit name:** Your name will be set automatically into the search settings (usually in the form of last name, name). You can modify the search criteria by adding name variants (e.g. last name, initials) or address options (e.g. Bremerhaven) via the + icon and delete it with x.
Tip: Creating restrictions by adding an address can prove very useful if there are many entries found under your name, which don't belong to you. Use the smallest meaningful word or term in an address. For example, enter "Bremen" and not "University of Bremen."
- 3** **Select databases:** Once you click on **«Search by name»**, the intended database is selected.
- 4** Don't forget to click **«save»** when you have finished editing your search settings.

Step 3: Run my searches

After entering your search settings, you can let the system start searching in the external bibliographic databases.

- 1** Under the section **«My Profile ->Account @ Name-based search»** you can click on **«Run my searches»**

- 2 After that, the selected time is displayed and the search will run automatically in the background. When your search is completed, your status will change to **«Last search succeeded»**.

Tip: Publications, which were not found, will be shown with a delay on your “Pending list”. Clicking the button „Run my Searches” multiple times will not speed up the process, thus please have patience.

Step 4: Claim publications

After running the publication search over the selected databases (it may be possible that data is displayed with a delay), the publications which have been found will be shown directly on your “Pending list”.

- 1 You will find your “Pending list” under the section **«[My Profile -> My Work -> Publications](#)»**.
- 2 Claim or reject individual publications using the green tick or red cross respectively. Or you can select a number of publications using the checkboxes, then **claim** or **reject** the marked publications with the large buttons at the top of the list. Claimed publications will move to the ‘Claimed list’ and rejected to the ‘~~rejected~~**Not mine** list’. In case of a new search, rejected publications will not be shown again on your “Pending list”.

Step 5 (optional): Automatic claiming

The Automatic Claiming page allows you to manage your author identifiers within **eXplore**.

- 1 Under the section **«[My Profile -> Settings -> ~~Account~~ -> Automatic claiming](#)»** you will find the ORCID (mentioned in step 1). Other author identifiers (e.g. ResearcherID, Scopus ID, email addresses) will be suggested to you.
- 2 A necessary condition for Automatic Claiming, is that an author identifier is assigned to the publications in the databases.
*Tip: Once you click on the author identifier profiles, you can create a link to **eXplore**. You will be asked for your ID or being forwarded to the Login page*

Add external profiles



 [Add arXiv Author Identifier](#)

 [Add figshare.com account](#)

 [Add ORCID](#)

 [Add ResearcherID](#)

 [Add Scopus IDs](#)

- 3 After accepting your ID, your publications will be shown automatically on your “[My publicationsMine](#) list” in **eXplore**
-

Step 6 (optional): Import

If the search in external databases does not achieve the intended result or you want to select data from other external data sources, you can import data into **eXplore** instead.

1

Import files can be generated in external databases (MathSciNet, PSYINDEX, WISO, JSTOR, etc.) or in a literature management programme like Citavi or Endnote.

*Tip: Depending on the external database, publication lists in the required format (BibTeX or Reference Manager/EndNote) can be exported directly from the system or you can create a new text document (Editor or Notepad++) via copy & paste and save it as *.txt. After that, you can change the ending into *.bib.*

2

Under the section «**My profile -> Tools -> Import PublicationsManage @ Publications @ Import**» you can upload bibliographic data as BibTeX (*.bib) or Reference/Manager (*.ris) by browsing folders in your computer, selecting the data format and clicking on «**Upload**».

Tip: Give your publication list a second look, before clicking on „Import“. New entries and already found entries are displayed to you separately.

Step 7 (optional): Grant assignment

eXplore allows you to create links between your publications and grants. Therefore, you can add a grant to your profile and create links between publications and your grants.

1

Go to your profile under «**My Profile -> About Me -> Edit profile Account @ View profile**» and click on «**View all links**».

2

Then choose Grant under the section «**Create links**».

3

After that, an entry mask will be displayed and you will be asked to enter a «**Link type**» and search for your grant via its title or reference number under «**search text**».

Tip: eXplore harvests in addition to publications also grants from Dimensions. Dimensions is the largest grants database available, with grants from more than

500 funders. As for publications **eXplore** uses a range of researcher identifiers to facilitate the claiming of and grant data.

4

In a final step, you can select your grant. Don't forget to click **«save»** when you have finished editing your search settings. Your grant will be shown on your summary page under the section **«My Profile -> My Work -> GrantsManage @ Grants»**.

5

Links between publications and grants (as well as between the other objects) can be created under the section **«My Profile -> Tools -> Create linksManage @ Create links»**. Therefore, choose the relevant objects that you want to link to one another and click on **«Create new link(s)»**

More information

For more information, please visit our project Confluence space

<https://spaces.awi.de/display/RISY/FAQ>

or write us an email: elements@awi.de.

Sincerely,
your CRIS project team!