IEEE Collabratec™

Tip Sheets

ieee-collabratec.ieee.org
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IEEE Collaboratec Resources

IEEE Collaboratec - ieee-collaboratec.ieee.org


IEEE Support Center – If you need assistance with IEEE Collaboratec please visit the IEEE Support Center where you can browse the FAQs, submit a question, conduct a Live Chat, or talk with a service professional 24/5, Sunday 4:30pm through Friday 4:30pm ET by telephone at:

+1.800.678.4333 (USA and Canada)
+1.732.981.0060 (Worldwide)


FAQs

Q. What is IEEE Collaboratec?
A. IEEE Collaboratec is an integrated online community where technology professionals can network, collaborate, and create - all in one central hub. IEEE Collaboratec offers a suite of productivity tools and is available to technology professionals around the world with exclusive features for IEEE members.

Q. Is there a fee to join IEEE Collaboratec?
A. No, there is no fee to join or use IEEE Collaboratec. IEEE members and non-members are welcomed to join IEEE Collaboratec.

Q. Do I need to be an IEEE Member or Volunteer to access IEEE Collaboratec?
A. No. IEEE Collaboratec is for IEEE members and non-members. You will need to have an IEEE Account to sign in. If you do not have an account you can create one by selecting the link "Create your free Account" located on the IEEE Collaboratec landing page.

Key Staff Contacts

<table>
<thead>
<tr>
<th>Responsibility</th>
<th>Name</th>
<th>Title</th>
<th>E-mail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community set-up</td>
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</tr>
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IEEE Collabratec Home

The home page in Collabratec is the first page encountered upon login. This page displays select content and activities that are personalized based upon your IEEE Collabratec experience. In addition to the activity list, the system will display recommendations for communities, professional networking, and research. Other features found here are elaborated on further below.

Primary Navigation

Clickable from the top left corner, this menu will provide links to all main areas of the site. Supplementary menu items are provided to bring you to your personal profile and settings. Links to other IEEE sites are provided in the lower portion of the menu as well.

Personal Dashboard

The following metrics are provided based on the primary activities in the system.

- **Professional Communities** – The number of communities that you have joined.
- **Library Documents** – The number of documents in your library.
- **People in your Network** – The total count of people added to your network.

Notifications, Invitations, and Profile Management Access

The notifications, invitations, and profile management area can be found at the top right portion of the site. This area extends features for each as described in the following sections.

Notifications

This area aggregates all interactions that require action. Different notifications will be provided based upon each specific action. Notifications can be removed through the close button on the right side of each notification as shown.
Invitations
Invitations can be extended to anyone via email. The email icon is provided via the top header across the site and when clicked an email form is launched where you can input an address and customize each email.

Global Profile Access
Navigate to your profile at any point by clicking on your picture in the header link.
- View your profile as other users would see it.
- Profile data is centrally managed via the IEEE Business Platform.
- Visibility settings allow you to control which information to show based on audience.

Activity Stream
The activity stream found in the center of the home page displays a list of all the activities that are relevant to you. This area is sorted by date activity to keep up to date information front and center for your viewing pleasure. We have also integrated activities from various attached services here. So if you attach your LinkedIn account you will begin to see LinkedIn updates in the activity stream. The same approach is applicable with Twitter.

IEEE Collabratec Toolbox
Found in the top right portion of the horizontal bar in the site is the toolbox icon. Upon click, this icon provides quick reference to the services you have attached via the settings panel. Here you can find Google Plus, Calendar, Mail, and Drive. In addition to the popular google services we have added LinkedIn, ORCID, and Twitter here as well.
Recommendations

People - Recommended people who share your interests are displayed on the left section of the home page just below the personal dashboard. This section recommends people based upon key profile attributes. You can also message and connect with individuals via this panel.

Communities - In addition to people recommendations, IEEE Collabratec offers community recommendations to help with community visibility for you. This section will show relevant communities of interest that can be joined or you can learn more about what each recommendation has to offer.

Research – The third section found on the left side of the home page displays a list of research you may be interested in section. Articles found here can be added directly to your library by clicking the “Add to Library” link. All of the research found here is retrieved from IEEE Xplore.
Settings

The settings panel is available via the Main Menu and allows you to attach Google Drive for attached storage and Google+ to experience extended functionality for communities.

Attaching Google Drive and Google+

- You can either connect to Google Drive and Google+ individually or as single combined action.
- Click on “Connect” next to either item and select either Add Drive, Add G+, or Add G+ and Drive.

Google Drive

Google Drive is used for storage of research documents in your library. IEEE members can attach a GAPPS account for 30 GB of storage space. Other participants can attach a Google account for 15 GB of storage space.

Google+ Extended Functionality

By attaching Google+, you can experience the below extended features for communities:

- The G+ community features:
  - Discussion strings
  - Photo, video and link posting
  - Google Hangouts
  - Polling

Disconnecting from Attached Services

To remove any of services connected, you can click on the “Manage” icon and select “Remove”.

Note: In the event that you experience issues with navigating from IEEE Collabratec to documents stored in Google Drive, it is possible that the authorization may have expired. If this is the case, you can remove the connection and re-connect.
Outside Social Networks and Registries

You can integrate your IEEE Collaboratec™ profile with other social networks and registries including LinkedIn, ORCID and Twitter.

LinkedIn

When attached, IEEE Collaboratec will return your network updates, comments and links from LinkedIn. As a result, most of what is shown in the middle column of the LinkedIn.com home page will be aggregated with the items found in the IEEE Collaboratec home page.

ORCID

ORCID is a registry used to uniquely identify authors and their research. Authors can create a link from their IEEE Collaboratec profile to ORCID.

To integrate your IEEE Collaboratec account with ORCID, select “Add” next to ORCID under settings and login with your ORCID username and password to authorize the linkage.

Twitter

When attached, IEEE Collaboratec will return your network updates, comments and links from Twitter. As a result, most of what is shown in the middle column of the Twitter home page will be aggregated with the items found in the IEEE Collaboratec home page.

Additional Storage Providers - Coming Soon

You can opt-in to be notified when additional storage providers are supported such as Dropbox, Microsoft Skydrive, and Box.
Managing your Profile

Getting to your Profile

**Main Navigation**
- Using the navigation menu, select “Profile”.

**Header**
- Clicking your profile image on the site header brings you to your Profile.

Creating your Profile

**Personal Information**
- Users with IEEE Account: “Personal Information” will be pulled from your existing IEEE profile upon first sign in
- Users without an IEEE Account will have to fill-out personal information

**Interests**
- Interests need to be populated by user.

View my profile as

- Shows profile display based on selected privacy settings
- Click arrow to select option from dropdown box.
- Displays how others see your profile information based on your privacy settings.

Managing your Privacy Settings

**Master Visibility Setting**
- Click arrow to select from drop down menu.
- Changes visibility for the entire profile.

**Profile Visibility**
- Click arrow on any drop down menu.
- Changes visibility for that specific profile attribute.

**Permissions**
- Click arrow on any drop down menu.
- Changes permission for that feature.

Editing your Personal Information

<table>
<thead>
<tr>
<th>IEEE Personal Data Professional and Educational Info Membership and Subscriptions Interests</th>
<th>• Data will be managed via your IEEE Account on <a href="http://www.ieee.org">www.ieee.org</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Defined within IEEE Collabratec™ and determines recommendations for people, communities and research.</td>
<td></td>
</tr>
</tbody>
</table>

**Your Collabratec Public Profile URL**
- URL that can be shared with your colleagues.
- May be customized to include your name. For example: [http://ieee-collabratec.ieee.org/app/p/JaneSmith](http://ieee-collabratec.ieee.org/app/p/JaneSmith)

**Your Publications**
- Includes research items in your library and marked as “My Publications”.

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Finding People

Global Search

- To find people, you can use the global search to search across all IEEE Collabratec™.
- You can also specifically limit your search by selecting “People” from the drop-down.
- IEEE Collabratec begins to provide type-ahead suggestions after entering the first character.

Browsing People

- Click on the main menu and select “People”.
- This view will show all existing IEEE Collabratec users who have opted-in to be discoverable.
- Navigate to next and previous set of results using the pagination bar.

Filtering

Various methods are available for finding users according to your relationships, geography, company, school, IEEE affiliation, and interests. Filters can be expanded or collapsed as shown below:

- **Relationship**: Narrow to all users (default), IEEE Volunteers, Authors, My Communities, and My Network.
- **Geography**: Limit users to a specific location. The top eight countries are listed by default (sorted by matches). You can search for additional countries using the search box (type-ahead suggestions will be displayed after entering the first character). Select country to filter results accordingly.
  - After refining by a country, you can also narrow by a particular state or province.

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Finding People

- **Company**: The top eight companies will be listed in order of matches. You can also search for a specific company if it isn’t listed.
- **School**: The top eight schools will be listed in order of matches. You can also search for a specific school if it isn’t listed.
- **Member Grade (Exclusive IEEE Member Benefit)**: Narrow results to specific IEEE member grades, for example Student Members, Senior Members, Fellows, etc.
- **IEEE Memberships & Affiliations (Exclusive IEEE Member Benefit)**: Narrow results by IEEE membership or membership to a particular IEEE society.
- **Interests**: Narrow results based on the IEEE Collabratec™ interests specified by users.

**People Search Results**

The search results listing displays matches based on your search criteria. Individuals may limit the amount of information shown within their privacy settings. Each result can contain the following information:

- **Personal Information**:
  - Photo, name, employment and educational information, geography, and IEEE membership details. A membership icon is shown for members with an active IEEE with different colors used to indicate membership grade, for example: Students (Green), Associate Members (Red), Members (Light Blue), Senior Members (Blue), and Fellows (Gold).
- **Key Actions**:
  - **Connect**: Sends an invitation to add to network.
  - **Similar to You**: Select this option to discover other individuals in IEEE Collabratec™ with similar interests and/or profile attributes.
  - **Follow on G+**: Will send an invitation to connect on Google+.
**Finding People**

**Adding People to Your Network**

Click on **Connect** to send a person an invitation to join your network.

Once a person is in your network, the “Connect” icon will change to “Manage”. You can click on the “Manage” button to remove someone from your network.

**Sending a Message**

You can send messages to other individuals in IEEE Collabratec. To do so, click on the “Message” button and send a message containing up to 2,000 characters.
Communities

Finding Communities

Menu Navigation: Using the navigation menu, select "Communities".

Search

- IEEE Collabratec™ participants can search for communities using the global search bar.
  - When searching "All", Communities will be one of the search result categories.
  - Selecting "Community" in the global search bar dropdown will only show communities in search results.
  - Click "Learn More" button to access more details about a community where you will then be able to click on the "Access Now" button to join the community.

Browse Communities Page

- Displays communities if you have already joined (if applicable).
- Lists communities the participant can join based on your IEEE Groups and Memberships.
- Lists recommended communities based on your selected interests and/or location.

Joining a Community

- Accessible to any IEEE Collabratec participant.
- Click "Learn More" button to access more details about a community where you will then be able to click on the "Access Now" button to join the community.

- Only open to IEEE Collabratec participants with a corresponding IEEE group or membership.
- Click "Learn More" button to access more details.
  - Participants with appropriate memberships will be granted admission by clicking the "Access" button.
  - Participants without appropriate memberships will have the opportunity to obtain membership. Participants will then be redirected to IEEE Collabratec and granted access to community.
Community Details

- Includes community image and description about the community as defined by the community moderator. Click on “Show Details” to expand description.

Community provided by

- Includes information regarding the sponsoring entity.

Events tab

- Contains details of upcoming events pulled from IEEE conference and volunteer platforms (vTools). Events are shown if they correlate to the interests or location of the community.
- Click on the calendar icon to add events to your personal calendar.

G+

- Click “Request Invitation” to participate in the extended G+ community.
- The G+ community features:
  - Discussion strings
  - Photo, video and link posting
  - Google Hangouts
  - Polling

(HGoogle account is required after attaching you will receive a G+ invitation)
Communities

Visit this community on

- Link to information about the community on other social networks including Facebook, LinkedIn, and Twitter.

Calendar Module

- You can narrow the events shown for a community to a particular date, using the calendar module.
- Navigate to a particular date to see events during that timeframe.
- Dates containing events will be highlighted. Upon selecting a date, events will be shown beneath. Click on “View All” to see the complete listing.
Events

The events page contains details of upcoming events pulled from IEEE conference and volunteer platforms such as vTools.

Navigating to Events

- Click on “Events” from the Main Menu

Events Page

- Events are shown chronologically showing 10 events per page.
- Click on the right and left arrow to navigate to the next and previous set of events.
- The date of each event is listed to the right and is categorized as either Meeting or Conference.
- High level details for each event are included such as:
  - **Event Title**: Click on link to go to more information on the event details page.
  - **Event Description**: If available. Click on “More” to see full description or go to event details page.
  - **Event Location**: Displays in Google Maps
  - **Event URL**: Links to the event website.
  - **Calendar**
    - Click on the calendar icon to add events to your personal calendar.
Events

Event Details Page

The Event Details Page is available by clicking on the event title from the main Events Page. From here, you can see complete description, date, location, and event URL.
Network

Browsing My Network

- Click on the main menu and select “My Network”.

My Network Page

My Network: Contains a listing of individuals already in your network.

Pending Requests: Displays any pending invitations from other IEEE Collabratec™ users.

Navigation: Up to ten individuals will be listed per page. Click on the left and right arrows to advance to next or previous page of results.

Search: Use the magnifying glass to search within your network. This feature will search against any individuals in your network (across all pages of results). Click on the magnifying glass to begin your search.

After entering at least one character, type-ahead suggestions will appear to assist you with searching. To select a suggested individual, simply click on the name that appears (or use your up and down arrows to navigate through the list presented). Once you are finished entering your search criteria (or have selected the individual), hit the enter key to perform your search.

You can limit the results to individuals who share the same societies, sections, or locations by clicking on the filters in the right column.

Navigating to Profiles from My Network

Click on an individual’s photo or their name to link to their IEEE Collabratec™ profile page.
Sending Messages

You can send messages to individuals in your network by selecting the button.

Enter a message containing up to 2,000 characters to send an e-mail to the address associated with that individual’s profile.

You can also choose to send a copy of the message to yourself.

Pending Requests

The “Pending Requests” view provides a listing of individuals who have sent you an invitation to connect. There are four options available, click on the manage button to:

- **Accept**: Accepts the invitation and adds the individual to your network (as well as adds you to their network).
- **Save for Later**: Allows you to postpone taking action on the invitation request. Invitations in this category will be separated out into a separate section so that in the future, you can either accept, decline, or block the request.
- **Decline**: Declines the invitation and removes the individual from your pending requests view. The individual does not receive a notification that their request has been declined, however if they navigate to your profile, the connect button will be disabled. After 30 days, that person has the option of sending another invitation.
- **Block**: Declines the invitation and blocks the individual from sending any additional requests. The individual’s name will remain in your pending requests view in the event you decide to remove the block. To remove a block, you can select “Manage” and “Undo Block”. The individual can then send another invitation request.

Removing Individuals from your Network

To remove an individual from your network, click on the gear icon and select “Remove”.

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Research Groups

Creating a Research Group

- Select “Research Groups” from the main menu.
- Click on the Create New button and enter the Research Group details included:
  - Research Group name
  - Description (optional)
  - Thumbnail Image (optional)
- Note: Participants can be added after the Research Group is created

Add Participants to the Research Group

- Within the Group Administration Panel:
  - Click on Invite participants to the group
    - Can search for an existing IEEE Collabratec™ user, or
    - Invite a user to join IEEE Collabratec™ via email

Post Message or Links

- Posting a Message
  - Within the activity tab, click on “Message” and enter a message of up to 4000 characters to share with the group.
- Posting a Link
  - Within the activity tab, click on “Link” and enter the link URL along with optional descriptive text to share with the group.

Posting Documents

- Click on the “Documents” tab
- Enter keywords for documents already in your personal library to share with the group.
  - The document search would find matches on metadata from any of the items already in your library such as document title, keywords, publication title, etc.

Editing Group Details & Closing a Group

- Editing Group Details: Click on “Edit Group Setup Info” from Group Administration to update the group name, description or thumbnail image.
- Transferring Group Ownership: Click on “Edit Group Setup Info” from Group Administration and select “Transfer Group Ownership” to pass ownership on to another participant within the group. Note: the user must already be in the group to pass ownership.
- Closing Group: Click on “Edit Group Setup Info” from Group Administration and select “Close Group”. After selecting close, the owner can:
  - Mark as Inactive: Retains for archival purposes but closes group and removes participants.
  - Close: Permanently deletes the group.
Library: Navigating the Library

Library Views

- Navigate contents of the library through either:
  - Column view (default)
    - Presents high level detail such as primary author, document title, publication title and year.
    - This view allows for sorting and quick scanning of data.
  - List view
    - Presents citations in a linear format along with brief abstract paragraph for additional context.

Hiding Filters

- The left hand filter panel can be hidden by clicking on the filter icon. Simply click again on the filter icon to restore the filters.

Sorting

Within the column view, contents of the library can be sorted by key fields by clicking on the column headings. Sort options are available on the following fields:

- Document title
- Publication title
- Author
- Publication year

The default sort for the library is to show the most recently added items first. Click on the column heading once to sort records in ascending (AZ) order by that field. Click a second time to re-sort in descending (ZA) order.
Library: Creating a Library

This guide outlines the methods for populating your IEEE Collabratec™ library.

There are various ways to add content to your library, all available via the icon.

Create New

If you are authoring a document, select “Create New” and select the preferred format, the only field required for creation is document title. Formats available include:

- Microsoft Word
- LaTeX (Coming Soon)
- Citation Record (Metadata Only)
- Google Docs
- Google Sheets
- Google Slides

Browse Files

Navigate to locally stored files for upload. Files can either be citation records downloaded from digital libraries or documents such as PDFs. For full-text PDF documents, the upload process will include auto-extraction of the metadata fields.

Research Tools (Mendeley & Zotero)

- An interface is available that allows for import of references and attachments from other bibliographic management tools such as Mendeley or Zotero.
- Sign in to existing Mendeley or Zotero accounts from IEEE Collabratec™, and upon providing authorization consent, import items from the external library source.
- Preview items before adding to your IEEE Collabratec™ library and select all or specific references to import.

Search Online

- Search for IEEE Xplore documents: Search nearly 4 million IEEE Xplore articles from to add to your library.
- Search for research using external search engines such as Google Scholar and Microsoft Academic Search and add citations to your library.
Library: Creating a Library

Find Your Authored Publications

- Find articles you have published. The search will find articles published matching your first and last name (as defined in the user’s IEEE profile) against Microsoft Academic Search.
- Can also search by alternate names if you have published under other name variations.
- Items added to the library through the Find My Publications feature will be included on your public profile.
- Authored publications can also be discovered and imported through the settings panel to associate with their profile.
- A “My Publications” filter allows you to narrow items in your library to view only research that you have authored.

IEEE Collabratec™ Profile – Edit Your Publications

Research Recommendations

- Research recommendations from IEEE Xplore are presented on the IEEE Collabratec™ home page based on your defined fields of interest. You can either view content on IEEE Xplore by clicking on the document title or you can add the citation to your library for future reference.
Library: Organizing the Library

IEEE Collabratec™ provides a variety of features to help organize your research.

**Favorites**
- Click on the star icon to mark articles as favorites from either the list or column view to easily find key research.

**Marking Research for Review**
- Flag individual or multiple items (via bulk update function) “to review” as a reminder of items needing additional review.
- Right click on a library item to mark for review via the shortcut menu.
- For multi-select:
  - Click on the checkbox next to each entry to be marked
  - Or click on Select All to select all items on the view
  - Select the drop-down “With Selected” to Mark for Review

**Research Collections**
- Group topics of related content into research collections. Users can navigate collections using the filter or research collection (folder) view.

**Creating New Research Collections:**
1. Navigate to Research Collection facet from the left panel.
2. Click on Create New.
3. Enter Collection name and select “Create”.

**Editing & Deleting Research Collections**
1. Navigate to Research Collection facet from the left panel.
2. Hover over the Research Collection to be edited and select either Rename or Remove.
   Note: Upon removing a Research Collection, items within that collection will remain in the library but will no longer be classified into a collection.

**User Tags**
- To apply custom defined tags in addition to the publisher defined keywords for research library items:
  - From the list or column view: Right click on the entry and select Apply My Tags from the shortcut menu. Enter custom defined tags.
  - User tags can also be added from within the metadata panel.
Library: Finding Research

Global Search

- Search for contents of the library from anywhere in IEEE Collabratec™ using the global search.

Searching within the Library

- Within the library, find research by searching against fields such as publication title, document title, authors, etc.
- Various tools are available to assist with structuring the search including type-ahead suggestions and “did you mean?” recommendations.
- Filters allow for locating research:
  - Recently Added (includes items added to the library during the last 7 days).
  - Requires Attention (includes items containing minimal metadata – you can edit records to populate with pertinent information such as publication title, author, publication year, etc.).
  - Review (includes articles marked for future review)
  - Favorites (includes articles marked as favorites using the star icon in the library listing)
  - My Publications (includes research you have authored and imported via the “Find My Publications”).
  - Recommended (includes articles recommended by others in your network - from this view you can see who recommended the item and when, you can also add the recommendation to your own personal library).
- Other facets allow to narrow library listing by data such as:
  - Content Type (such as journal article, conference article, standard, book, educational course, etc.)
  - Publication Year
  - Research Collection (custom defined collections of related content)
  - Keywords (as provided by the publisher and incorporated via import process)
  - My Tags (user defined tags)
  - Author (captured for all authors of an article as defined in the citation record)
  - Publisher (IEEE, IET, etc.)

Search Operators

The following operators are available within the IEEE Collabratec™ Library for purposes of finding specific content:

- The following operators are available and must be in all capital letters:
  - AND, OR, NOT, NEAR, ONEAR
Library: Generating Bibliographies and Exporting Citations

Generating Bibliographies

- Select citation records using the “book” icon. Grey indicates un-selected, green represents selected items.
- Use the Generate Citation action bar to start the process of creating a bibliography.
- Click on Bibliographies
- Select the Citation Style, either IEEE or other formats such as APA, MLA, etc. can be selected.
- Bibliographies are created in RTF (rich text format) and can be either downloaded locally or saved to IEEE Collabratec™ cloud storage.

Exporting Records

- Select citation records using the “book” icon.
- Use the Generate Citation action bar to start the process of exporting records.
- Select “Export Citations”.
- Specify export format, either RIS or BibTeX.
- Select “Export” and specify path to save locally for import into other tools.