Merlin v1.7

Manual – May 2012

Contents

1 Contributions

1.1 Search Contribution

Merlin provides two different means to search for specific contributions, the *Quick Search* and the *Advanced Search*.

Quick Search *(available for general use in v1.8)*

The *Quick Search* feature can be used to quickly search for contributions that match some keywords either in the title or the abstract of the contribution. It is displayed in the side menu on many pages that are related to contributions.

To search for contributions using *Quick Search*, the following steps are needed:

1. Select "Contributions" in the top menu (Figure 1) or visit another page related to contributions.
2. In the in input field in the side menu you can enter some keywords to search for a specific contribution (Figure 2). Several keywords can be separated by a whitespace, then all results that match at least one of the keywords will be displayed.
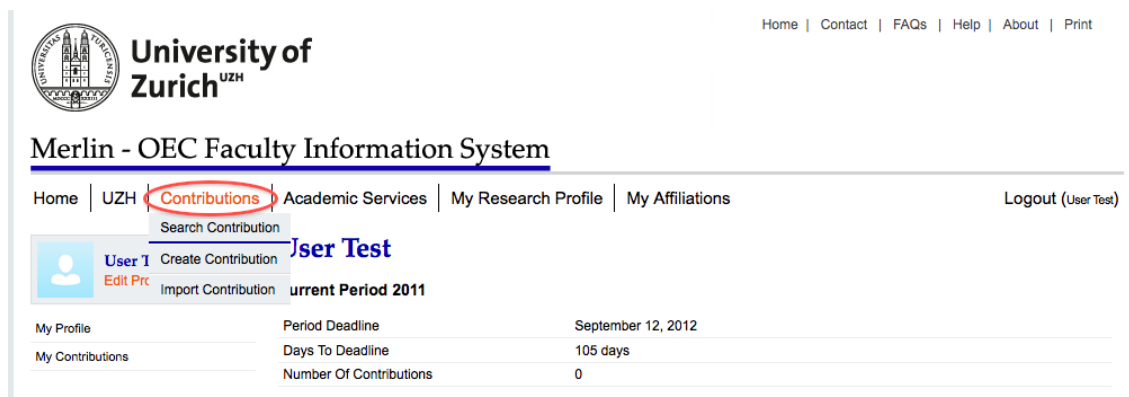3. Click "Go".

Figure 1: Selection of "Contributions" in the top menu

University of Zurich^UZH

Merlin - OEC Faculty Information System

Home | UZH | Contributions | Academic Services | My Research Profile | My Affiliations

Logout (User Test)

User Test
Edit Profile

Search Contribution

Create Contribution

Import Contribution

Quick Search - Contribution

Go »

Contributions in Merlin

Contributions

Adrian Bachmann, Abraham Bernstein, When Process Data Quality Affects the Number of Bugs: Correlations in Software Engineering Datasets, In: MSR '10: Proceedings of the 7th IEEE Working Conference on Mining Software Repositories, Cape Town, South Africa, 2010-05. (Conference or Workshop Paper published in Proceedings)

bib

Michael Würsch, Giacomo Ghezzi, Gerald Reif, Harald C. Gall, Supporting Developers with Natural Language Queries, In: Proceedings of the 32nd International Conference on Software Engineering, IEEE Computer Society, 2010-05. (Conference or Workshop Paper published in Proceedings)

bib

Michael Würsch, Gerald Reif, Serge Demeyer, Harald C. Gall, Fostering Synergies - How Semantic Web Technology could influence Software Repositories, In: Proceedings of the 2nd Intl. Workshop on Search-driven development: Users, Infrastructure, Tools and Evaluation (SUITE)., 2010-05. (Conference or Workshop Paper published in Proceedings)

bib

Figure 2: Field to enter keywords for the *Quick Search*

Advanced Search

The *Advanced Search* feature can be used to search for contributions based on a set of additional parameters that go beyond the keywords of the *Quick Search*.

To search for contributions using *Advanced Search*, the following steps are needed:

1. Select "Contributions" – "Search Contribution" in the top menu (Figure 3).
2. Fill out the parameters you want to consider for your search (if nothing is entered for a specific parameter, the parameter will be ignored). The supported parameters are (Figure 4):
   - In the *Title* field you can enter the title or part of the title of the contribution.
   - In the *Organization Unit* field you can enter the unit which is associated with the contribution. If you enter multiple units, contributions that match any of the units will be displayed.
   - In the *Author* field you can enter the author of the contribution. If you enter multiple authors, only contributions with all authors will be displayed.
   - In the *Editor* field you can enter the editor of the contribution. If you enter multiple editors, contributions that match any of the editors will be displayed.
   - In the *Type* selection, you can specify the contribution category (type) of the contributions you want to search for (the results will be the same if you select all types or none of them).
   - In the *Key Words* field, you can enter the same keywords as in the quick search (see Quick Search *(available for general use in v1.8)*).
   - In the *Year* selection, you can choose the range in which the contributions were published. It is possible to choose a value for only one of the *from/to* fields, the other will automatically be set to the highest/lowest value.
3. Click "Search"

Figure 3: Selection of "Search Contribution" in the top menu

Figure 4: Input form for the *Advanced Search*

1.2 Create Contribution

To add a new contribution to Merlin using the *Create Contribution* wizard, the following steps are needed:

1. Select "Contributions" – "Create Contribution" in the top menu (Figure 5).
2. Select the appropriate *Contribution Category* (type) from the drop-down list. Note that this category can be changed after the contribution was saved successfully (see Change Category of Contribution).
3. Enter a *Title* for the contribution and click "Continue" (Figure 6).
4. Enter the name of the *Organizational Unit* for this contribution or select it via the organization unit selector tree (the house icon on the right side; Figure 7). It is possible to add multiple organization units to one contribution.

5. Fill out at least all mandatory fields. Mandatory fields are marked with a key icon (Figure 8) and vary depending on the contribution category.
6. Click "Save".

Figure 5: Selection of "Create Contribution" in the top menu
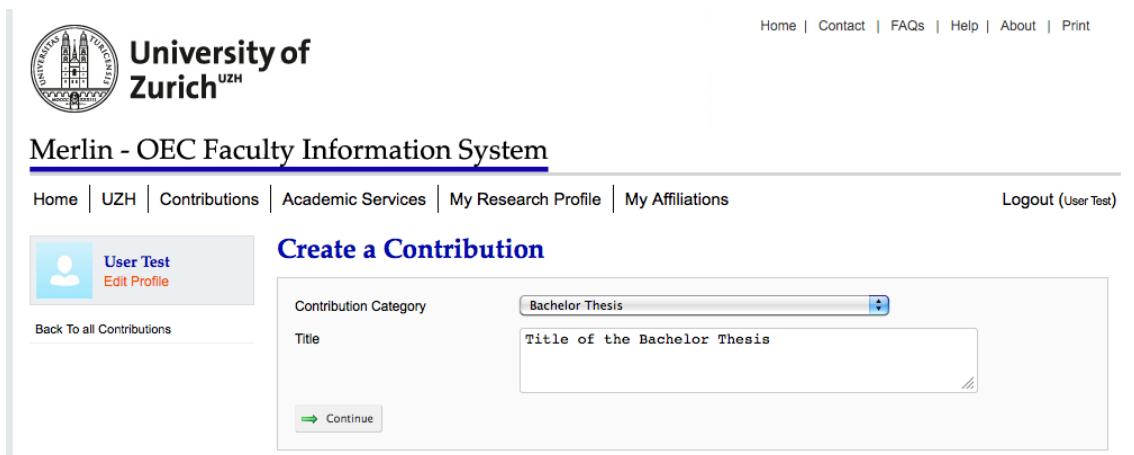
Figure 6: Definition of *Contribution Category* and *Title* of contribution
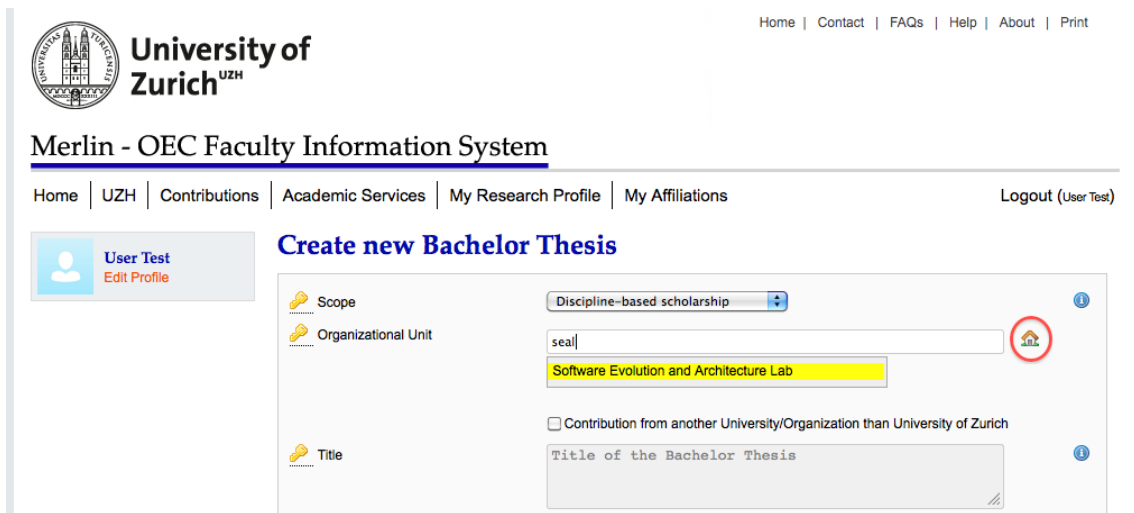
Figure 7: Selection of *Organizational Unit*s
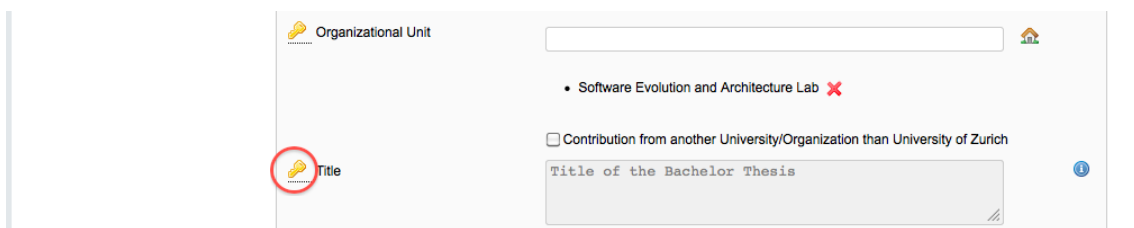
Figure 8: The key icon – indicator for a mandatory field

1.3 Import Contribution

To add a new contribution to Merlin using the *Import Contribution* wizard, the following steps are needed:

1. Select "Contributions" – "Import Contribution" in the top menu (Figure 9).
2. Enter or paste a valid BibTeX entry (Figure 10). Note that importing is limited to a single entry.
3. Click "Continue".
4. Check and extend, if necessary, the imported data (Figure 11) as described in Create Contribution.
5. Click "Save".

Figure 9: Selection of "Import Contribution" in the top menu

Figure 10: BibTeX entry field

Figure 11: Check and extend imported data

1.4 Contribution Details

The *Contribution Details* page (Figure 13) is available for each contribution in Merlin and contains all data about the contribution. It can be reached by clicking on the title link of a contribution at various places in Merlin (e.g. on the "My Contributions" page; Figure 12). Moreover, it provides metadata about the contribution such as when and by whom it was created (*Creator*) and the status of the submission to ZORA (if it is relevant for ZORA). The *ZORA Status* indicates if the contribution was already submitted to ZORA and if it was accepted (*Accepted*, *Under review* or *Not submitted or rejected*). Additionally, the details page contains links to export the data of the contribution in the BibTeX and EP3 XML (ZORA) formats.

Figure 12: Title link to open the *Contribution Details* page

Figure 13: *Contribution Details* page

The side menu on the *Contribution Details* page contains links for the following features:

Edit Contribution

The data of a contribution can be edited by clicking on "Edit" in the side menu (Figure 14). Note that this entry is only displayed if you have the rights to edit this contribution. Clicking on "Edit" opens the contribution in the same input form that is used for creating a contribution (see Create Contribution), except of the button to accept the changes which is labeled "Update". If the contribution is ZORA-relevant and was already submitted, editing is limited to changing the organization units.

Figure 14: Side menu entry "Edit"

Delete Contribution

A contribution can be deleted from Merlin by clicking on "Delete" in the side menu (Figure 15). Note that this entry is only displayed if you have the rights to delete this contribution and if it was not yet confirmed. For this action a confirmation dialog is used (Figure 16) because it cannot be undone.
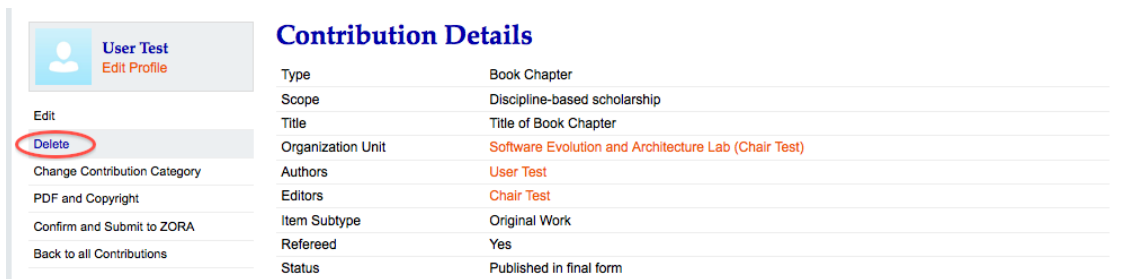
Figure 15: Side menu entry "Delete"
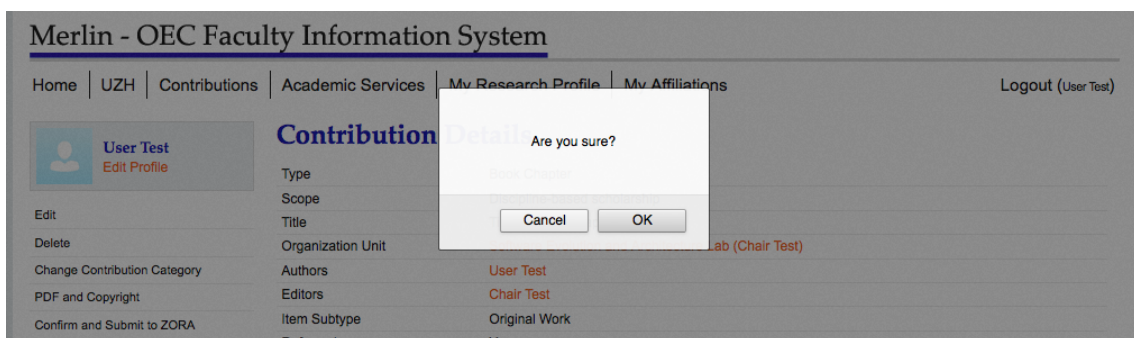
Figure 16: Confirmation Dialog for deleting a contribution

Change Category of Contribution

The contribution category (type) of a contribution can be changed without the need to re-enter all data. Note that this is only possible if you have the rights to edit the contribution and if it was not yet confirmed.

To change the category of a contribution, the following steps are needed:

1. Select "Change Contribution Category" in the side menu (Figure 17).
2. Select the new contribution category (Figure 18).
3. Click "Convert".
4. Check and extend, if necessary, the data as described in Create Contribution.
5. Click "Update".
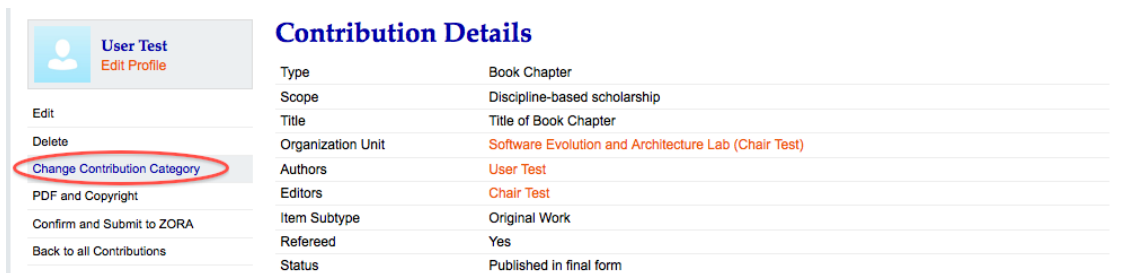
Figure 17: Side menu entry "Change Contribution Category"

Figure 18: Selection of the new contribution category

Set PDF and Copyright

It is possible (and recommended) to add a PDF file to each contribution (if available). The copyright situation of the uploaded PDF can also be set (as in ZORA). Please upload a version of your contribution that can be offered for public download, i.e. the author version before copy editing (akzeptiertes Manuskript) or any other version where you have the copyright!

To upload a PDF file and set its copyright, the following steps are needed:

1. Select "PDF and Copyright" in the side menu (Figure 19).
2. Select a PDF file from your local drive (Figure 20).
3. Click "Upload".
4. Select the appropriate copyright of the PDF.
5. Optionally, you can set a *PDF Download Release Date* (embargo date) which hides the PDF from download until this date.
6. Set if the PDF is visible to the public (*Anyone*) or to Merlin users only (*Registered users only*).
7. Click "Save".

Figure 19: Side menu entry "PDF and Copyright"

Figure 20: Dialog to upload a PDF file

Figure 21: Specify copyright, release date and visibility of the PDF

Confirm and Submit to ZORA

To increase the data quality for reporting, contributions in Merlin need to be confirmed as correct. Confirming a contribution in Merlin automatically submits it to ZORA, if it is ZORA-relevant.

To confirm an individual contribution, the following steps are needed:

1. Select "Confirm and Submit to ZORA" (or "Confirm" if the contribution is not ZORA-relevant) in the side menu (Figure 22).

2. Confirm the correctness in the respective dialog (Figure 23).

Figure 22: Side menu entry "Confirm and Submit to ZORA"

Figure 23: Dialog to confirm correctness of the contribution data

2 My Research Profile

2.1 Edit Profile

To edit your profile data, the following steps are needed:

1. Select "My Research Profile" in the top menu (Figure 24).
2. Select "Edit Profile" in the side menu (Figure 25).
3. Edit your profile. Note that some fields (e.g. *Last Name*) are import from the UZH SAP system and cannot be changed in Merlin. If those fields contain errors please contact your local administrative staff.
4. Click "Update".

Figure 24: Selection of "My Research Profile" in the top menu

Figure 25: Side menu entry for "Edit Profile"

2.2 Update Profile Picture

To set or update your profile picture, the following steps are needed:

1. Select "My Research Profile" in the top menu (Figure 24).
2. Select "Update Profile Picture" in the side menu (Figure 26).
3. Select a picture from your local drive.
4. Set the picture by clicking "Save Picture".

Figure 26: Side menu entry for "Update Profile Picture"

2.3   My Contributions

The *My Contributions* page provides a list of contributions that you authored. It can be reached by selecting "My Research Profile" – "My Contributions" in the top menu (Figure 27). You can search these contributions using some of the search parameters described in Advanced Search by clicking on the "Show/Hide Filter" button. Furthermore, you can select your top publications (at most five) by clicking on the star icon next to each contribution (Figure 28).

Figure 27: Selection of "My Contributions" in the top menu

Figure 28: Star icon to select a top contribution

2.4 My Top Contributions

The *Top Contributions* page provides an ordered list of your top publications as selected on the My Contributions page. It can be reached by selecting "My Research Profile" – "My Top Contributions" in the top menu (Figure 29). You can change the order of you top contributions by using the arrow up/down icons (Figure 30). A contribution can be removed from the top contributions list by using the cross icon (Figure 30).
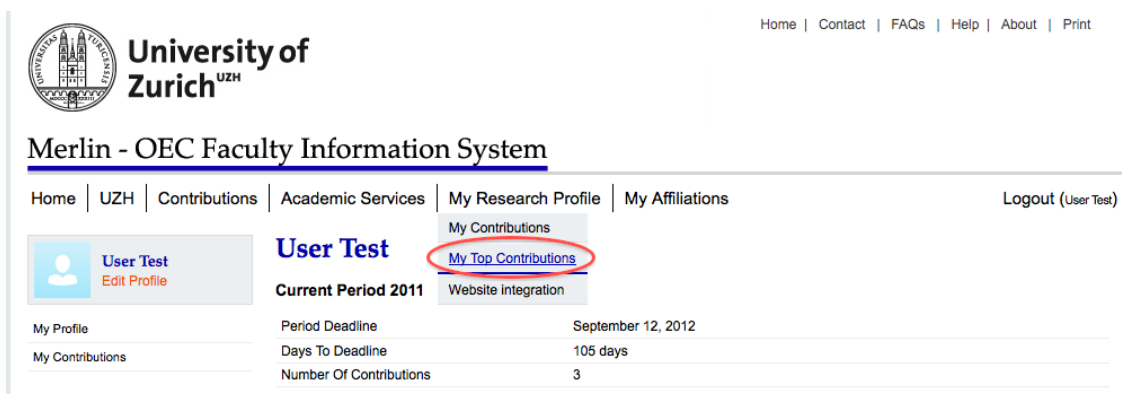
Figure 29: Selection of "My Top Contributions" in the top menu
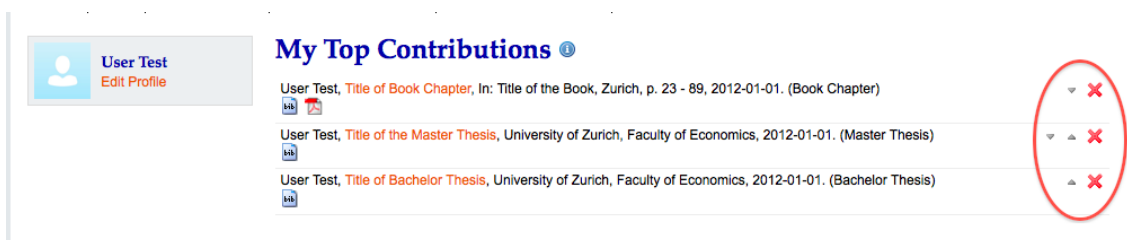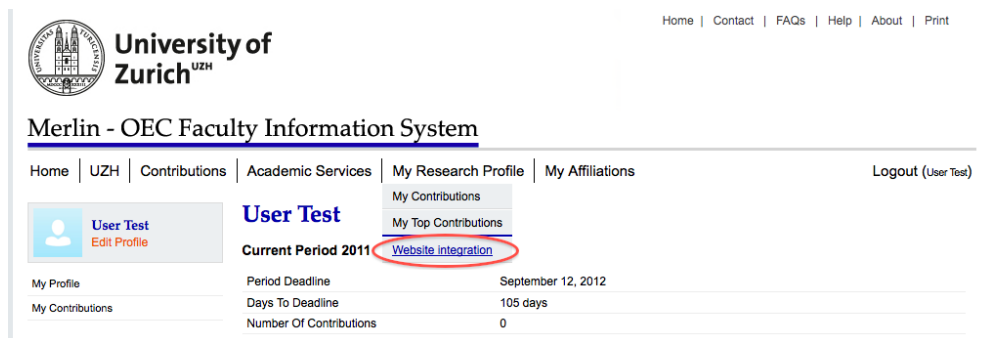
Figure 30: Icons for ordering and removing top contributions

2.5 Website Integration

Merlin provides the possibility to integrate a dynamically updated list of your contributions (or the contributions of your organization unit) to your website. More information is available on the *Website integration* page in Merlin that can be reach by selecting "My Research Profile" – "Website integration" in the top menu (Figure 31).

Figure 31: Selection of "Website integration" in menu

3 Confirmations

To increase the data quality for reporting, the personal data and the contributions in Merlin need to be confirmed as correct. The *Home* page in Merlin (which appears after login) contains a section titled "Open Confirmations" that display a message if there are contributions or changes of your personal data that need to be confirmed. The *Home* page further contains the current confirmation deadline.

3.1 Confirm Contributions

See Confirm and Submit to ZORA on how to confirm individual contributions.

To confirm multiple contributions at once, the following steps are needed:

1. Select "Home" in the top menu.
2. If there are contributions you have to confirm, a link appears below "Open Confirmations" (Figure 32) that leads to the overview of contributions to confirm.
3. Select all the contributions you want to confirm (Figure 33). Note that contributions can not be edited after confirmation.
4. Click "Confirm & Submit to ZORA" to confirm the selected contributions and submit the ZORA-relevant ones to ZORA.

Figure 32: Link to the overview of the unconfirmed contributions
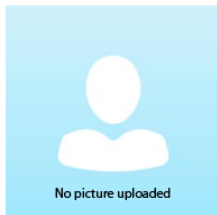
Figure 33: Overview of the contributions to confirm

3.2 Confirm Personal Data

Your personal data must be confirmed as correct once a year or if you change it after confirmation. To confirm your personal data, the following steps are needed:

1. Select "Home" in the top menu.
2. If your personal data needs to be confirmed, a link appears below "Open Confirmations" (Figure 32) that leads to the confirm profile page.
3. Check and correct, if necessary, your data.
4. Click "Confirm Profile" in the side menu. (Figure 34).
5. Approve the dialog (Figure 35).

Figure 34: Overview page and side menu entry for "Confirm Profile"
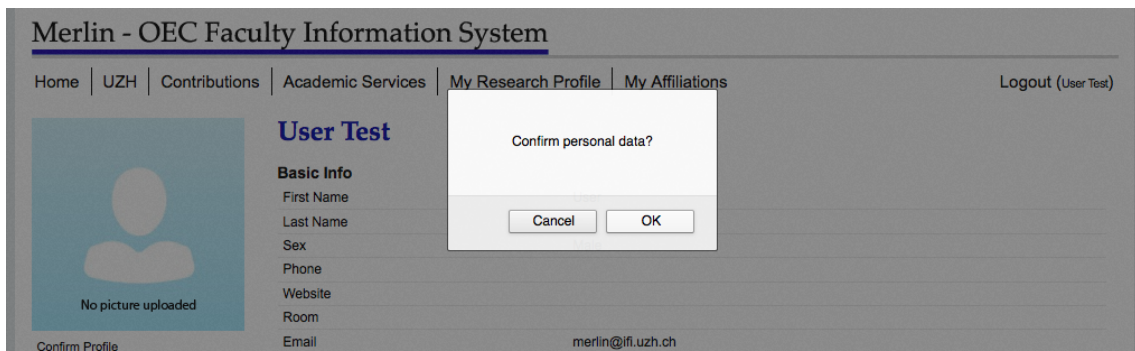
Figure 35: Confirmation dialog for personal data

4 Chair

This section describes the main features reserved for chairs in Merlin. The *Chair* top menu entry is only visible to chairs.

4.1 Pending Employee Requests

Merlin organizes memberships in organization units in a two-phase process. First an employee selects an organization unit and thereby creates a request to join this organization unit. Second, the chair of the organization unit receives this request and has to accept or decline it.

To accept of decline an employee request, the following steps are needed:

1. Select "Chair" – "Pending Employee Requests" in the top menu (Figure 36).
2. Either accept or decline the request (Figure 37).
3. If the request is declined you can optionally enter a reason that is sent to the employee (Figure 38).

Figure 36: Selection of "Pending Employee Requests" in the top menu

Figure 37: List of all employee requests and action icons
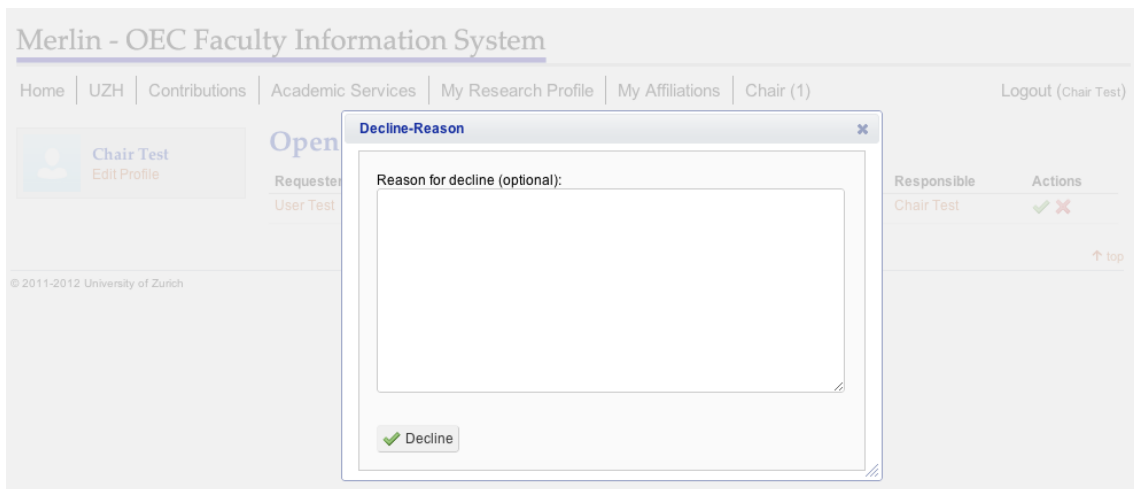
Figure 38: Dialog to enter a reason for declining the request

4.2 Manage Employee Permissions

Access rights in Merlin are primarily based on the memberships in the organization units. This means, a user that is a member of a organization unit can, for example, create, edit and delete contributions for the whole unit. A secondary aspect of access rights in Merlin is the distinction between users, chairs and admins. If this access rights system is not sufficient, it is possible to create employee permissions which assign certain access rights to an employee until they are revoked.

To create a new employee permission, the following steps are needed:

1. Select "Chair" – "Employee Permissions" in the top menu (Figure 39).
2. Select "Create Employee Permission" in the side menu (Figure 40).
3. Enter the name of the employee who should receive the permission (*Assignee*; Figure 41).
4. Enter the *Module* for which the permission should be created. The modules correspond to the entries in the top menu and allow the assignee to use the features of this menu entry. For example, the "Contributions" module allow the assignee to create, edit and delete contributions of the group.
5. Click "Save".
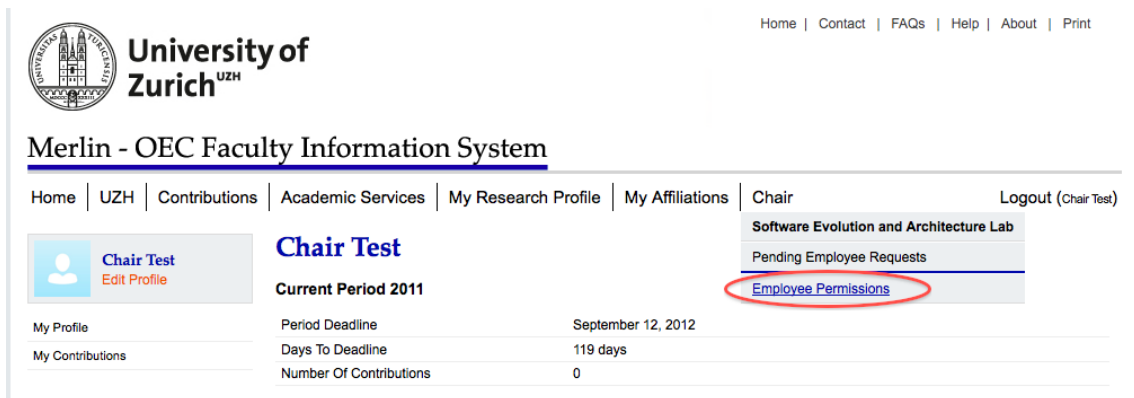
Figure 39: Selection of "Employee Permissions" in menu

Figure 40: Selection of "Create Employee Permission" in the sidemenu
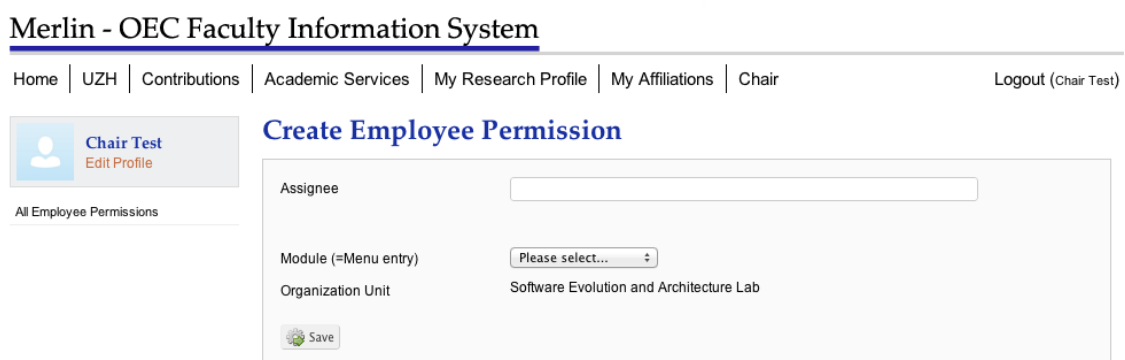
Figure 41: Create Employee Permission input form

4.3 My Affiliations

"My Affiliations" lists all organization units of an employee. It contains basic information about the organization unit. For the chair of a unit it is possible to edit this basic information.

Add External Employee

Internal employees of the faculty are automatically added to Merlin based on the UZH SAP system. External employees such as lecturers need to be added manually by the chair of the affiliated organization unit.

To add an external employee, the following steps are needed:

1. Find and select your department under "My Affiliations" in the top menu (Figure 42).
2. Select "Create external Employee" in the side menu (Figure 43).
3. Enter the personal data of the external employee.
4. Click "Save".

Figure 42: Selection of the department to add employees

Figure 43: Side menu entry for "Create external Employee"

4.4   Academic Services

Edit Academic Activities

To edit the academic activities, the following steps are needed:

1. Select "Academic Services" – "Academic Activities" in the top menu (Figure 44).
2. Click on the links in the list of academic activities to edit each activity (activities which aren't set yet are marked with a warning symbol; Figure 45).
3. Enter a list of the activity of your department (Figure 46) or select the checkbox below the input field if you want to assign no value to the activity (Figure 47).
4. Click "Save".

Figure 44: Selection of "Academic Activities" in menu

Figure 45: Overview of the academic activities

**Figure 46**: Field to enter the list of the activity

Figure 47: Selected checkbox to assign no value to the activity

5   Contact

5.1   Contact the Merlin team

If you encounter any problems in using Merlin or if you have questions about it, please use the contact form. The contact form can be reached from every page in Merlin by clicking on "Contact" in the top right corner (Figure 48). In addition to your message, it sends information about the Web browser and operating system you use. This information is vital for investigating problems you might encounter.

Figure 48: Contact the Merlin team

5.2   Error Report

If an unexpected error occurs your are presented an input box where you can describe your actions leading to the error and send an error report (Figure 49). Please describe you actions in detail and send the error report. Together with technical information about the error and information

about your Web browser and operating system, this allows the Merlin team to investigate and fix the error.

Figure 49: Sending an error report