ZoneRecherche – User Guide

I - Connect to ZoneRecherche

ZoneRecherche URL: https://zonerecherche.hec.ca

Access codes: HEC ID and password

II - Dashboard (home page)

1 – To **view** your detailed profile: affiliations, expertise, research interests, publications, other research activities, funded projects

2 – To **modify** your profile

3 – To **add** publications or other research activities to your profile

4 – Displays the activities or publications that are **to be completed**

5 – **Displays** the latest changes made to your activities or publications

6 – Left menu:

Publications: List of all your publications: journal articles, book reviews in a journal, edited books, chapters, research papers, other publications.

Other research activities : List of all your research activities: editorial activities, non-HEC research administration, conferences (organization, participation, presentation), scientific or professional association management, awards and honors.

Journals: List of all journals listed by the Research and Knowledge Transfer Office.

Organisations: Open only to Chairs and Research Unit Directors at HEC Montréal. To update the unit's contact information and add annual and productivity reports.

Funded projects: List of all your funded research projects as principal investigator and co-investigator (read only access)

Occasions de financement: List of the main research funding opportunities to which HEC Montréal's researchers frequently apply (internal and external) with description, eligibility conditions and deadlines.

Note: For these 6 lists, it is currently possible to perform sorts and filters.

Notifications: ZoneRecherche Messaging (functionality not available at this time).

III - Add your expertises

1) Once you are logged into ZoneRecherche, in the dashboard, to the right of your name, click on the **Edit** link.

2) Then click on the **Research Profile** tab.

3) You can then add or modify your fields of expertise and research interests (English and French).

Example: Adding a Review Article

4) In the dashboard, click on the **Add New Content** button (top right) and choose **Publication**
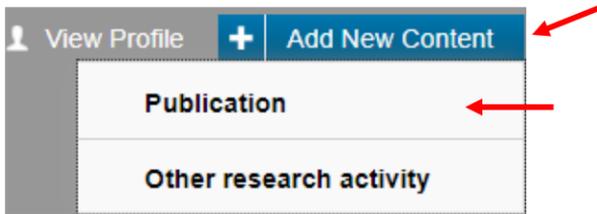
5) In the list, select the type of publication: **Journal article**

6) Enter all relevant information for your article (fields marked with an asterisk * are required in order to save your publication).

   Note: In order for a publication to be displayed on your personal web page, it is essential to fill in the following fields:

   - Publishing status : must be either Accepted, In Press, Online or Posted
   - Peer reviewed article : must be « Yes », because only peer-reviewed articles are displayed on your web page

7) For the entry of the journal:
   - In the "Journal Title" field, enter the **exact name** of the journal.

8) For the « Author(s) field :
   - It is important to **select your role** so that it is displayed correctly on your web page.

9) Save the publication as "Completed".

   - When all the information is entered for your article, click on the button « Save & Submit ».
   - A pop-up window will appear: you must then click on "Completed", and then on "Done".

V- Add an activity

Example: Adding an editorial activity - permanent member of an editorial review committee

1) In the dashboard, click on the **Add New Content** button (top right) and choose **Other research activity.**

2) In the list, select the type of activity: **Editorial activity: review duty**

3) Enter all relevant information for your article (fields marked with an asterisk * are required in order to save your activity).
* Important: Even if you have a multi-year term as a member of an editorial review committee, you must enter a new activity for this term every year.

4) Save the activity as "Completed".
   - When all the information is entered for your activity, click on the button « Save & Submit ».
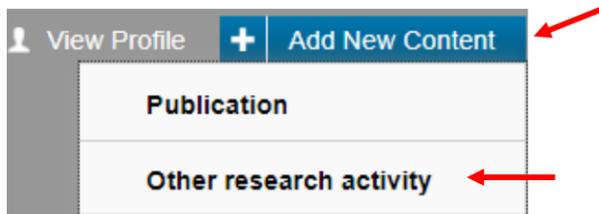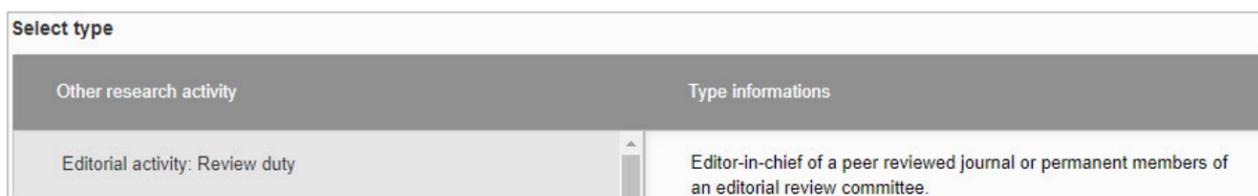   - A pop-up window will appear: you must then click on "Completed", and then on "Done".

VI – Consult your funded research projects
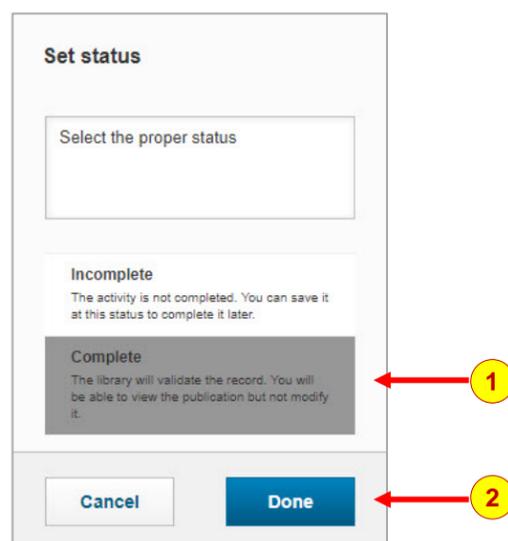
ZoneRecherche allows you to consult your funded research projects. (Read access only)

- You will find information about the researchers of the project, the overall funding, the official documents, as well as your research results (journal articles and conferences-presentations) related to the projects.
- If you notice that a funded project for which you are the principal investigator or co-investigator on the official documentation is missing, please contact activites.recherche@hec.ca.
- Please note that a certain delay is possible between the favourable announcement of funding for a research project and its entry in ZoneRecherche.
- Funded projects for which you are the principal investigator and co-investigator are also available under your profile.

1) Access the list of your funded research projects by clicking on "Funded projects" in the left menu.

2) From the list, you can quickly access certain information by clicking on the triangle, and all of the available information by clicking on the project title.

3) You can also filter the list of your projects by clicking on "Filter".
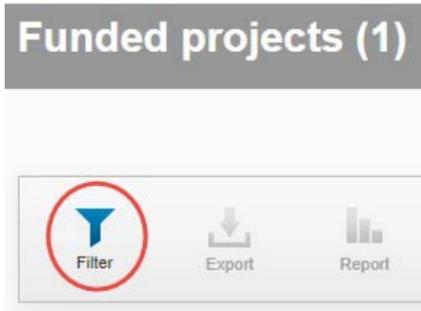
4) Then **select the desired filter** using the four selection levels.
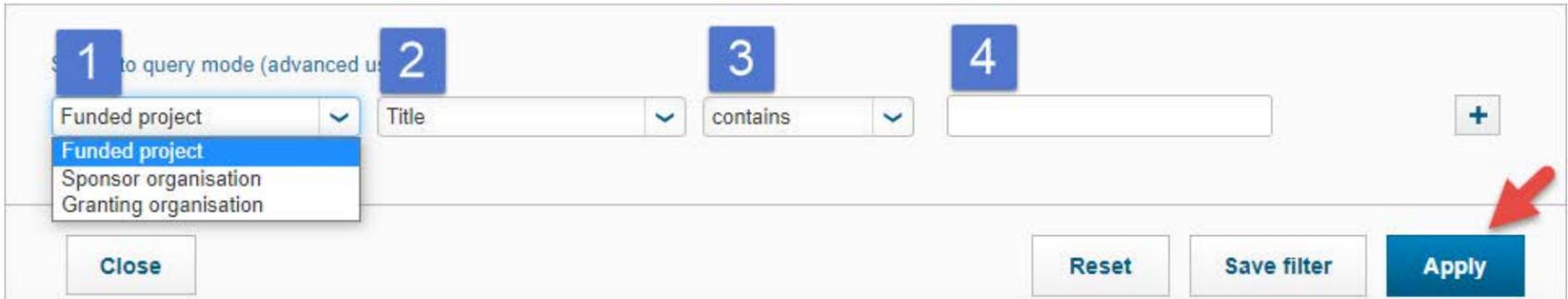
- You can filter your research projects to identify those with open access compliance requirements according to funding source.
  o Example :

- Select "Sponsor organisation" to find your funded research projects that were not subject to an application for funding to a competitive opportunity.
- Select "Granting organisation" to find your research projects that resulted from a grant application on a competitive opportunity.
- If you choose to filter by sponsor or granting organisation, be sure to select the name or acronym in the second level of the filter. Complete the selection at the third level for the logical operator as well as the fourth level which is used to specify exactly the value you are looking for. Click on "Apply" to run the selected filters.

  o Examples :
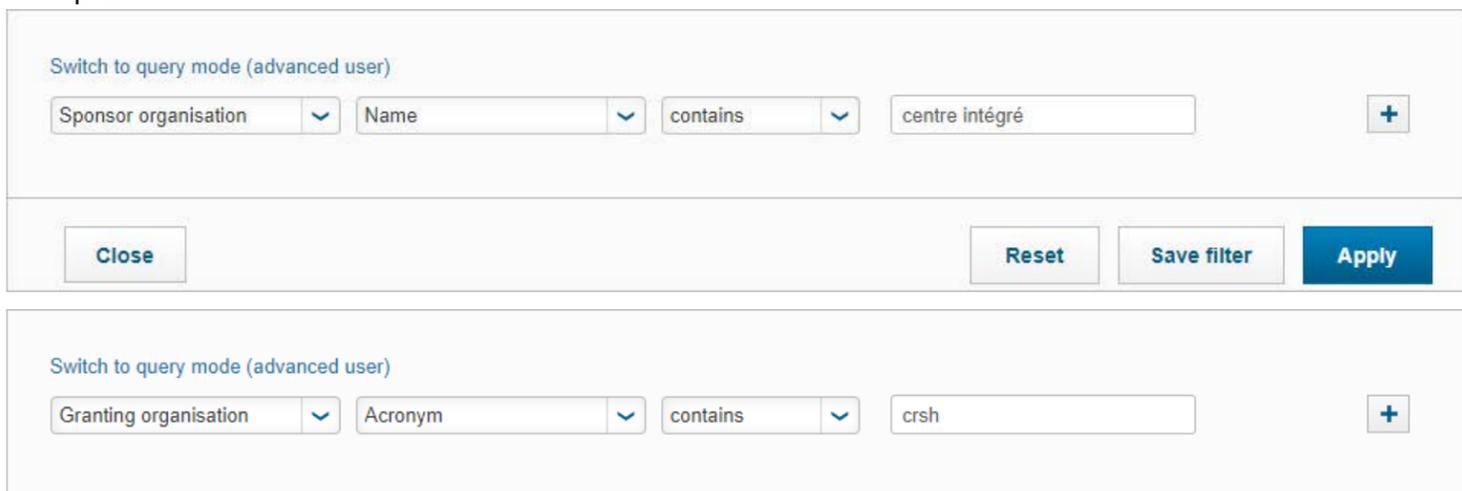
5) Under the filters menu is the menu to **define the sort and number of results displayed**. The sorting options are:

- Updated on (ascending or descending)
- Alphabetical order of the searched value (A-Z or Z-A)

6) To **increase the number of results in the list**, click on "50" or "100".

ZoneRecherche allows you to consult the main research funding opportunities to which HEC Montréal's researchers frequently apply (internal and external) with description, eligibility conditions, amounts and deadlines.

1) Access the list of funding opportunities by clicking on " Occasions de financement " in the left menu.

Dashboard
Publications
Other research activities
Journals
Organisations
Funded projects
Occasions de financement
Notifications

2) From the list, you can quickly access certain information by clicking on the triangle, and all the available information by clicking on the name of the occasion de financement.

Programme d'appui au développement de l'agriculture et de l'agroalimentaire en région
Ministère de l'Agriculture, des Pêcheries et de l'Alimentation
Edit
🚩 Visible to the public

Transfert de bourses postdoctorales en subventions de démarrage
Fonds de recherche du Québec - Société et culture
🚩 Visible to the public

No deadline

Edit

Subventions à la découverte individuelles
Natural Sciences and Engineering Research Council of Canada (NSERC)
🚩 Visible to the public

Most recent deadlines are indicated and updated when they are officially disclosed.
Deadline(s)

Submission of letter of intent to funding agency : 01.08.2021
Submission to Research office for detailed revision : 18.10.2021
Institutionnal approval/signature : 29.11.2021
Submission of application to funding agency : 01.11.2021

Deadline further details : Pour le concours de l'automne 2021, la date limite pour déposer un avis d'intention est le mardi 3 aout 2021 à 20 h (heure de l'Est).

Edit

3) You can also filter the list of funding opportunities by clicking on "Filter".

Occasions de financement (30)

▼ Filtrer ⬇ Exporter 📊 Rapport

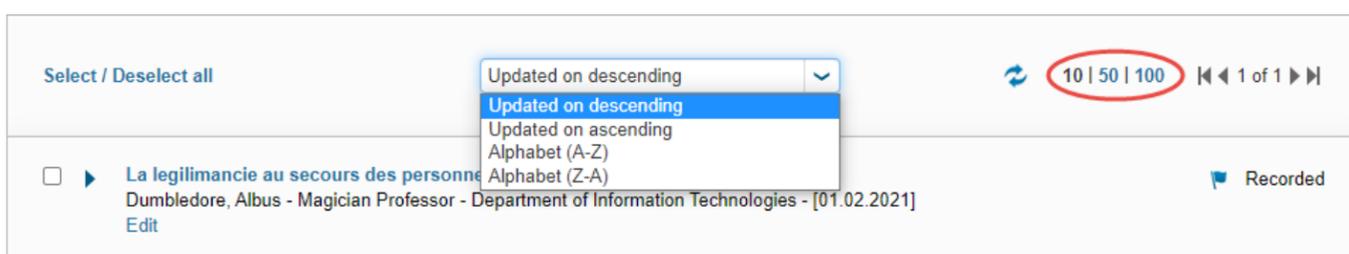4) Then **select the desired filter** using the four selection levels.

- Select "Occasion de financement" to be able to access the second level of filter where several classifications are available, as well as to be able to filter funding opportunities that have no deadline. Complete the selection at the third level for the logical operator as well as the fourth level which is used to specify exactly the value you are looking for. Click on "Apply" to run the selected filters.

o Example :

- Select "Dates" to filter the funding opportunities according to the various deadlines specified in the second level of the filter. Complete the selection at the third level for the logical operator as well as the fourth level which is used to specify exactly the value you are looking for. Click on "Apply" to run the selected filters.

  Funding opportunity with no deadline will not appear in the results when using this filter.

- If you choose to filter by "Organisation" to filter funding opportunities by granting organisation, be sure to select the name or acronym in the second level of the filter. Complete the selection at the third level for the logical operator as well as the fourth level which is used to specify exactly the value you are looking for. Click on "Apply" to run the selected filters.

5) Under the filters menu is the menu to **define the sort and number of results displayed**. The sorting options are:

   - Updated on (ascending or descending)
   - Alphabetical order of the searched value (A-Z or Z-A)

6) To **increase the number of results in the list**, click on "50" or "100".

VI - Filter and sort all of your publications

Filters and sorting are useful for:

- Check if all your publications have been entered
- Show only certain categories of publications
- View the list of your publications according to a certain order

1) Access the list of your publications by clicking on "Publications" in the menu on the left.

2) In your list of publications, click on "Filter".

- Then, in the drop-down list to the right of "Publication", select the desired filter.
  Example: To display publications published between 2016 and 2018, select the "Publication year" filter.
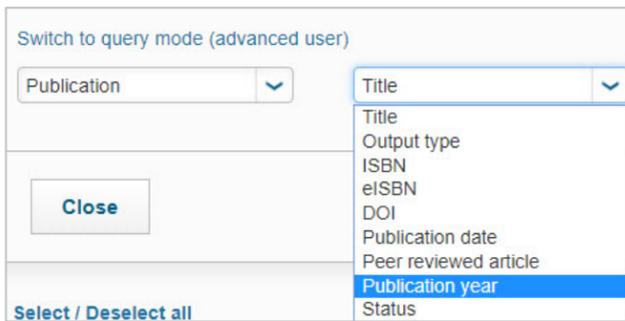
3) A third drop-down list will appear, and you can define the criteria for the filter.

- For our example: select the criterion "Between", then indicate the years of publication "2016 and 2018".
- Then click on "Apply".
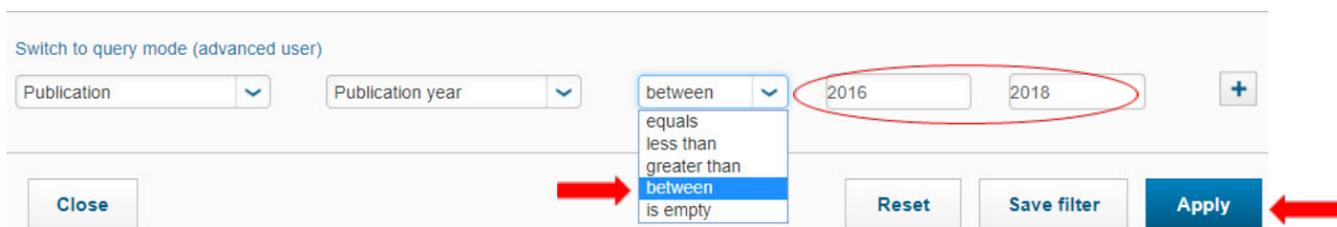
4) Below the filter menu is another menu to set the sort and number of results displayed. The possible sorts are:

- update order (descending or ascending)
- alphabetical order of 1st author (or reverse alphabetical order)
- chronological order of publication year (or reverse chronological order)

5) To increase the number of results in the list, click on "50" or "100".
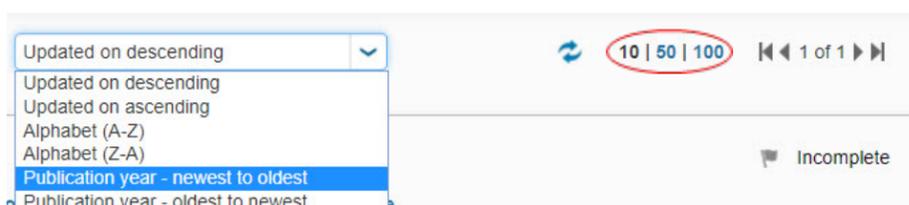
VII - Extract lists of publications as a report

ZoneRecherche allows you to extract lists of your publications as a report (PDF or Excel).
Currently, researchers have access to one report in ZoneRecherche (others will be added later):

- List of all publications, classified by publication category and research year, including the HEC ranking of the journal or book.

Example: Extract the list of your publications

1) Access the list of your publications by clicking on "Publications" in the menu on the left.

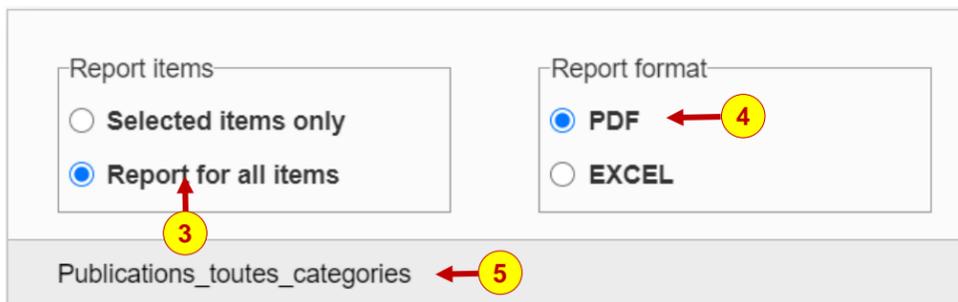| Dashboard |
|---|
| Publications |
| Other research activities |
| Journals |
| Organisations |
| Notifications |

2) For a list of all your publications, without any filter, click directly on "Report".
   * You can also filter your publications before extracting the list. In this case, perform the filter steps on the previous page BEFORE clicking on "Report".

Publications (62)

▼ Filter   ⬇ Export   📊 Report
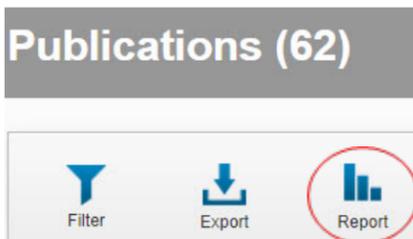
3) In the reports menu, click on "Report for all items".

4) Select the type of file you want (in the example, it is the PDF format that is selected).

5) Then click on the report "Publications_toutes_categories".

┌─Report items──────────────┐   ┌─Report format─────────────┐
│ ○ Selected items only │   │ ◉ PDF   ← 4 │
│ ◉ Report for all items │   │ ○ EXCEL │
└────────────3───────────────┘   └───────────────────────────┘

Publications_toutes_categories   ← 5

6) Finally, click on the "Create a report" button. After a few seconds, the report will be generated and you can save it to your computer.

Publications_toutes_categories

Cancel   **Create report**

> For any other questions about ZoneRecherche, please write to activites.recherche@hec.ca.