

User guide – for organisation administrators

For clarification on any of the steps described in this organisation administrator user guide or to make suggestions for improvements, please email rdflplannerhelpdesk@vitae.ac.uk with 'Organisation admin user guide' in the subject line.

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1 Brief introduction to the RDF Planner

[The Vitae Researcher Development Framework \(RDF\)](#) provides a foundation for the design and development of all Vitae training and development activities. Vitae's sector-leading RDF framework articulates the knowledge, skills, and behaviours of effective researchers, and is used for planning, promoting and supporting the personal, professional and career development of researchers both within academia and across sectors. Originally developed by researchers in 2010, and embedded across the UK and international institutions, the RDF is a recognised framework for planning and supporting your personal and professional development. It does so by providing a structured map of the broad skills and behaviours of an effective researcher, and by empowering researchers to take ownership of their professional and career development, whatever their current career aspirations. The framework also provides a recognised language and scaffolding to articulate their developing competencies and skills.

The RDF Planner tool enables a structured, reflective approach to professional development. Drawing upon the Researcher Development Framework 2025, it supports researchers to identify strengths, set development goals, track progress, understand their professional journey, and take ownership of their career development.

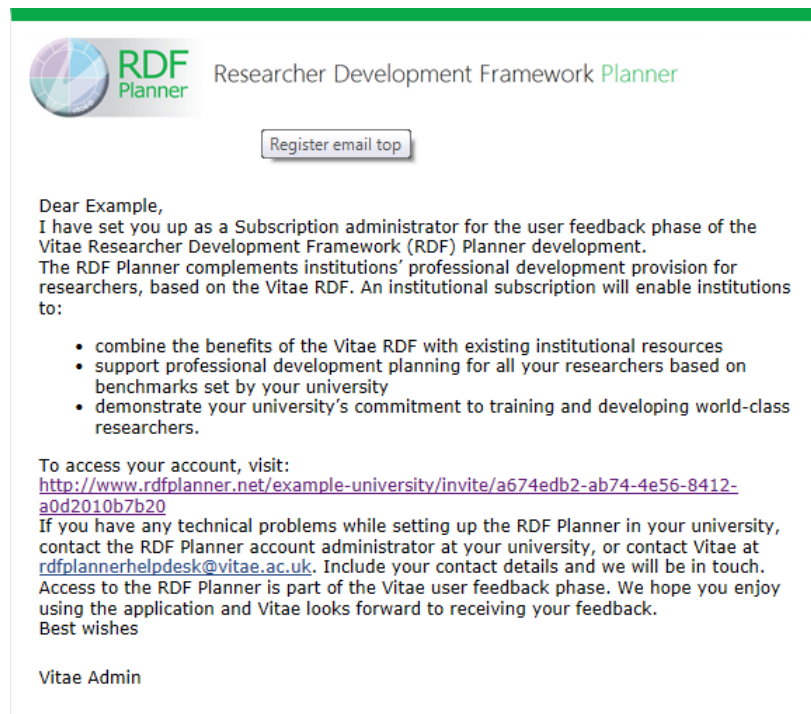
The RDF Planner organisation administrator interface has been designed with the aim of making it as easy as possible for organisation subscription administrators to:

- ✓ navigate the admin interface
- ✓ upload and add users to the subscription
- ✓ monitor the number of users added to your subscription and the subscription limit
- ✓ upload an organisation logo that will appear in the application header for all subscription users
- ✓ add links to organisation resources and training opportunities and map these links to the Researcher Development Framework.

2 Getting started

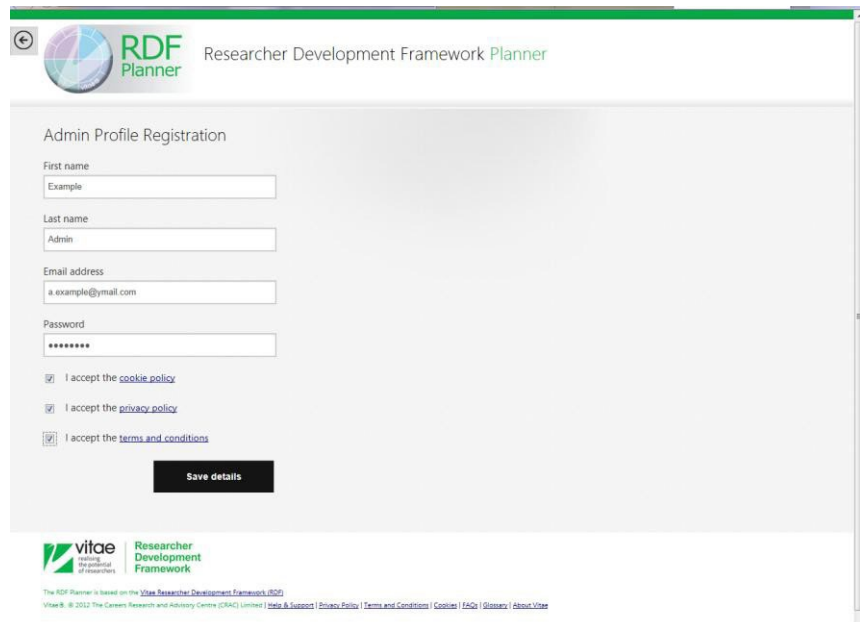
- 1 Follow the link in the invitation email sent by the Vitae administrator from 'noreply@rdfplanner.net' to log on to the RDF Planner. If you are expecting but haven't received an invitation from Vitae, please check your spam folders and filters. If you still cannot find your invitation email please contact rdfplannerhelpdesk@vitae.ac.uk.

Invitation email sent from 'noreply@rdfplanner.net'.



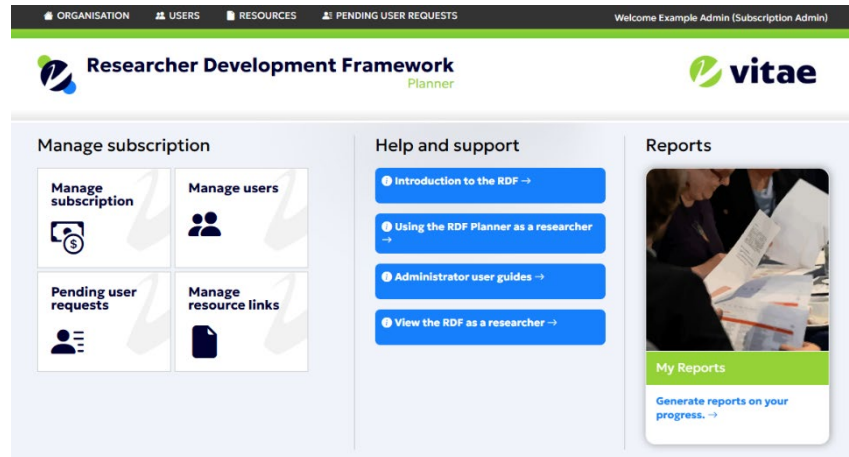
- 2 When you click on the invitation link in the email, you will be taken to the organisation administrator registration page.

Tip: you should use a complex password to protect your organisation subscription from unauthorised access.



The screenshot shows the 'Admin Profile Registration' page. It contains a form with the following fields: First name (Example), Last name (Admin), Email address (a.example@gmail.com), and Password (masked with asterisks). Below the form are three checkboxes for accepting the 'cookie policy', 'privacy policy', and 'terms and conditions'. A 'Save details' button is at the bottom. The footer includes the Vitae logo, the text 'Researcher Development Framework', and a small disclaimer: 'The RDF Planner is based on the Vitae Researcher Development Framework (RDF) Vitae® © 2026 The Careers Research and Advisory Centre (CRAC) Limited. All rights reserved. For conditions of use please refer to RDF Planner Terms and Conditions.'

- 3 Fill out the form and agree to the policies and conditions. Click on the 'Save details' button. You will be taken to the organisation administrator home page.

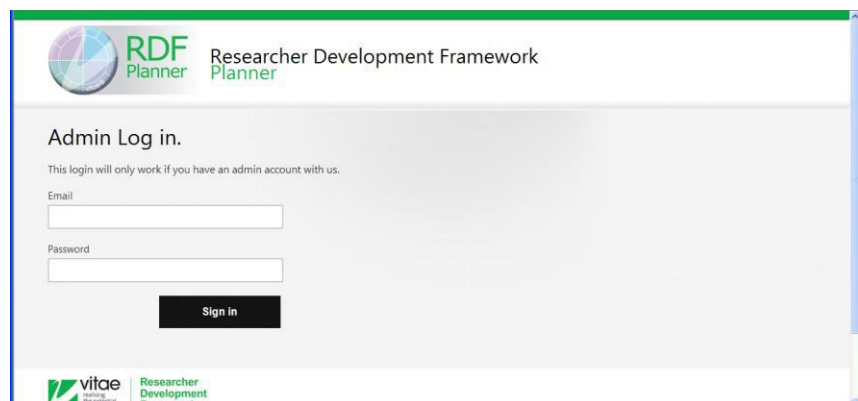


- 4 Your administrator account is now set up. Follow the instructions below in 'Logging on to the RDF Planner' when you wish to administer your organisation's subscription to the RDF Planner.

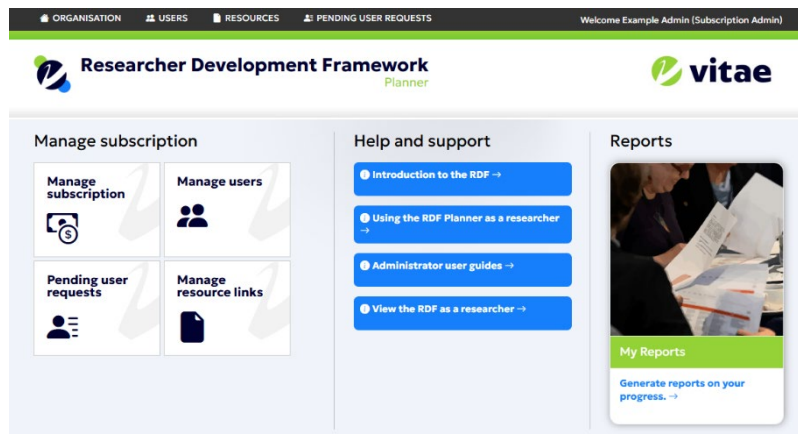
3 Logging on to the RDF Planner

The following steps assume that you have already been invited by Vitae and registered as an organisation administrator on the RDF Planner (see 'Getting started' above)

- 1 Log on to the application at rdfplanner.vitae.ac.uk/admin



- 2 Enter your email address and the password you provided when you registered as the organisation administrator (see 'Getting started' above). You will now be logged on to the RDF Planner organisation administrator homepage.



4 Navigating the RDF Planner admin interface

From the RDF Planner organisation administrator home page you can:

4.1 Managing subscriptions and users section

- Manage subscriptions – first tile/box on the organisation administrator home page and first menu option in the organisation administrator header. From here you can view the details of your organisation subscription and review your subscription limit and the number of users registered under your subscription.
- Manage users – second tile/box on the home page and second menu option in the organisation administrator header. From here you can view a searchable list of users on your organisation subscription. You can add and remove users, send and resend emails inviting users to register on the RDF Planner under your subscription and de-activate your subscription users.

Resources section

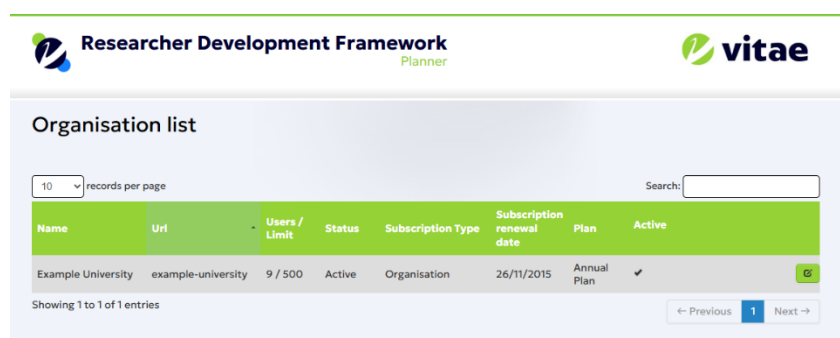
- Manage resources – third tile/box on the organisation administrator home page and third menu option in the organisation administrator header. From here you can view, add, upload, delete and reorder resource links (links to your organisation researcher development resources that have been added to the RDF Planner).
- View the RDF as a researcher – fourth tile/box on the organisation administrator home page. From here you can view the RDF tree view that the registered user sees when they explore the RDF.

You can use the 'Home' icon in the header to return to the RDF Planner organisation administrator home page from anywhere in the application.

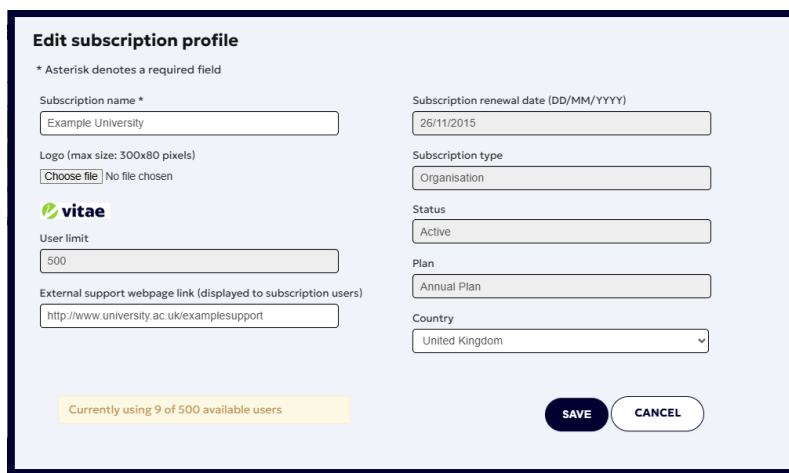
There are links to 'Help and Support' files, the 'Privacy Policy', 'Terms and Conditions', 'FAQs' and a 'Glossary' of RDF terms in the application page footer.

5 Step 1: Uploading your organisation logo

- 1 From the organisation administrator home page, select the 'Manage subscription' tile/box or the 'Organisation' menu option in the organisation administrator header. The 'Organisation list' page will open.



- 2 Select the 'Edit' button in right hand side of your organisation subscription row. The 'Edit subscription profile' window will open.



- 3 Select the 'Choose logo' button next to the field labelled 'Logo (max size: 300x80 pixels)' and find and upload a suitable logo for your organisation from your local file system.

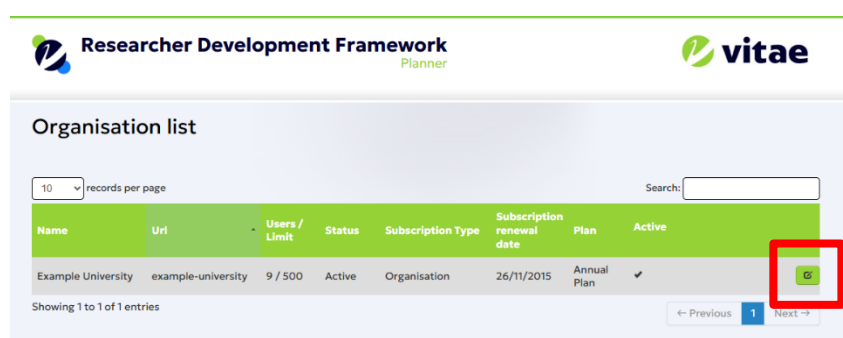
6 Step 2: Directing users to your organisation's internal RDF or professional development page

As an organisation administrator you can direct your subscription users to an organisation web resource that promotes professional development in general or which is specifically aimed at giving your users guidance on how to use the RDF and the RDF Planner.

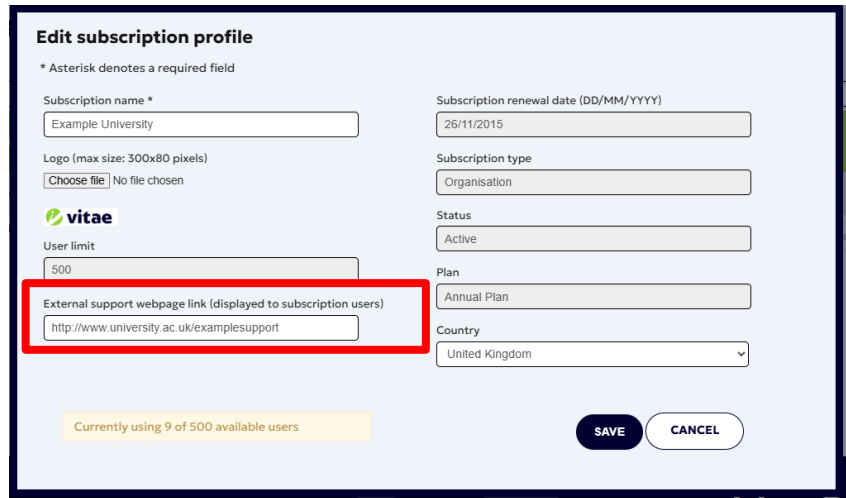
The link to this resource is presented to the user in the 'Useful links' section labelled 'View <Organisation Name> support' on the user home page.



- 1 From the organisation administrator home page, select the 'Manage subscription' tile/box or the 'Organisation' menu option in the organisation administrator header. The 'Subscription list' page will open.



- 2 Select the 'Edit' button in right hand side of your organisation subscription row. The 'Edit subscription profile' window will open.



- 3 Enter the URL to your organisation support page in the 'External support webpage link (displayed to subscription users)' field.
- 4 Select 'Save'.

7 Step 3: Mapping your organisation resources to the Vitae RDF

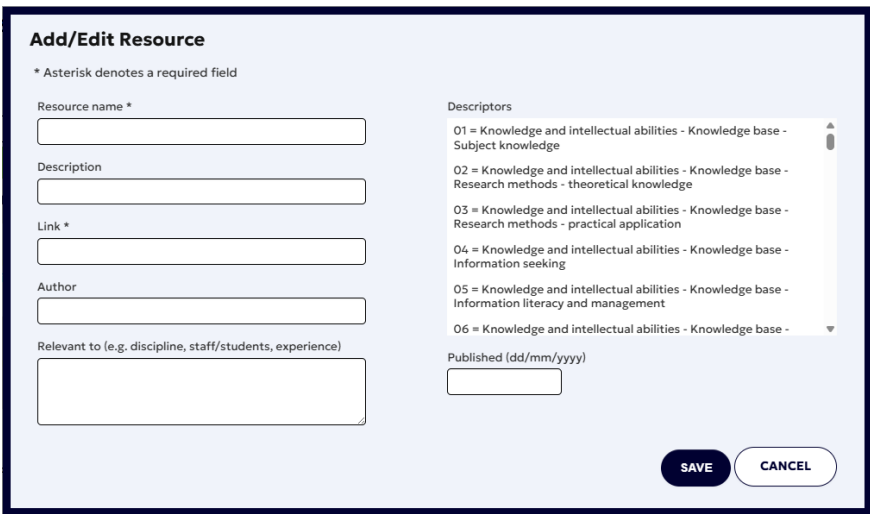
As an organisation administrator, you can add labelled hyperlinks to your organisation's researcher development resources and map these links to one or more descriptors in the Vitae Researcher Development Framework (RDF). This will add great value to your organisation's use of the RDF Planner and will enable your subscription users to reach your training and development resources relevant to the areas in the RDF that they are examining.

7.1 Adding a single resource link

- 1 Select the 'Manage resources' tile/box on the organisation administrator home page or the 'Resources' menu option in the organisation administrator header. The 'Resource list' window will open.



- 2 Select the 'Add resource' button. The 'Add/Edit Resource' window will open.



The 'Add/Edit Resource' form contains the following fields and sections:

- Resource name ***: Text input field.
- Description**: Text input field.
- Link ***: Text input field.
- Author**: Text input field.
- Relevant to (e.g. discipline, staff/students, experience)**: Text input field.
- Descriptors**: A list of descriptors for selection:
 - 01 = Knowledge and intellectual abilities - Knowledge base - Subject knowledge
 - 02 = Knowledge and intellectual abilities - Knowledge base - Research methods - theoretical knowledge
 - 03 = Knowledge and intellectual abilities - Knowledge base - Research methods - practical application
 - 04 = Knowledge and intellectual abilities - Knowledge base - Information seeking
 - 05 = Knowledge and intellectual abilities - Knowledge base - Information literacy and management
 - 06 = Knowledge and intellectual abilities - Knowledge base -
- Published (dd/mm/yyyy)**: Date input field.
- SAVE** and **CANCEL** buttons at the bottom right.

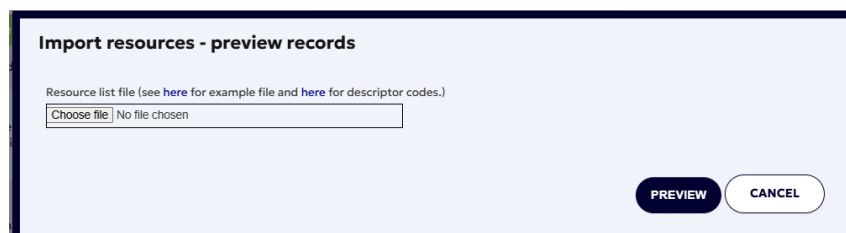
- Give the resource link a title, description, link URL, author name and published date.
- Select one or more RDF descriptors that you wish the resource to appear against.
- Select the 'Save' option.
- Your resource link will appear as a row in the 'Resource list'.

7.2 Bulk uploading of resources

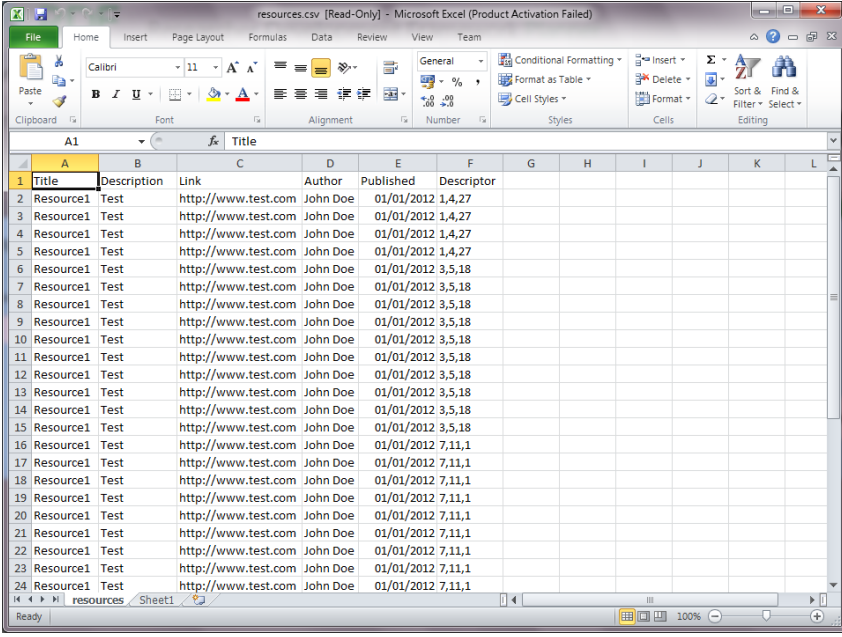
- 1 To make it easier to link the RDF to your organisation's researcher development resources and opportunities we have added a bulk resource link upload function. An organisation administrator can prepare a .csv (comma delimited) file containing the resource links, descriptive text and RDF descriptor mappings which can then be imported into the RDF Planner.
- 2 Select the 'Manage resources' tile/box on the organisation administrator home page or the 'Resources' menu option in the organisation administrator header. The 'Resource list' window will open.



- 3 Select the 'Import resources' button. The 'Import resources – preview records' window will open.

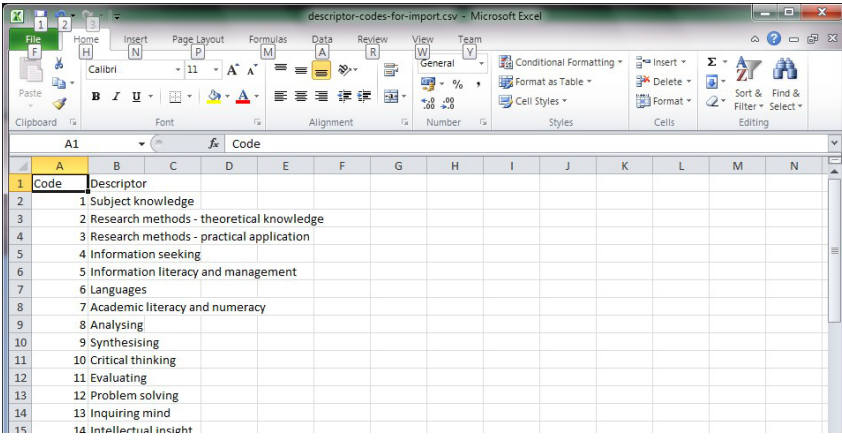


- 4 Select the example file link to download an example file showing the format for .csv data required for a successful import.



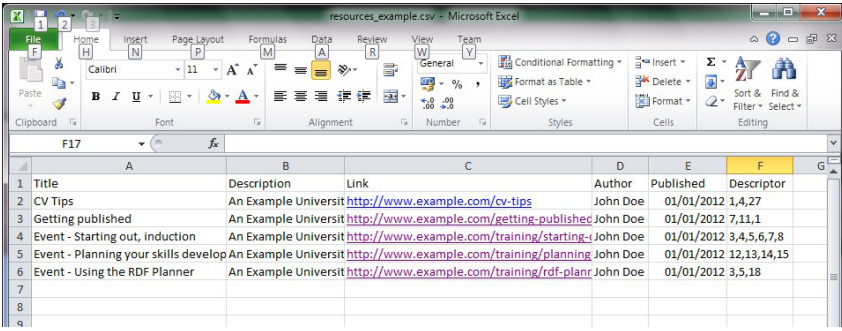
	A	B	C	D	E	F	G	H	I	J	K	L
	Title	Description	Link	Author	Published	Descriptor						
1	Resource1	Test	http://www.test.com	John Doe	01/01/2012	1,4,27						
2	Resource1	Test	http://www.test.com	John Doe	01/01/2012	1,4,27						
3	Resource1	Test	http://www.test.com	John Doe	01/01/2012	1,4,27						
4	Resource1	Test	http://www.test.com	John Doe	01/01/2012	1,4,27						
5	Resource1	Test	http://www.test.com	John Doe	01/01/2012	1,4,27						
6	Resource1	Test	http://www.test.com	John Doe	01/01/2012	3,5,18						
7	Resource1	Test	http://www.test.com	John Doe	01/01/2012	3,5,18						
8	Resource1	Test	http://www.test.com	John Doe	01/01/2012	3,5,18						
9	Resource1	Test	http://www.test.com	John Doe	01/01/2012	3,5,18						
10	Resource1	Test	http://www.test.com	John Doe	01/01/2012	3,5,18						
11	Resource1	Test	http://www.test.com	John Doe	01/01/2012	3,5,18						
12	Resource1	Test	http://www.test.com	John Doe	01/01/2012	3,5,18						
13	Resource1	Test	http://www.test.com	John Doe	01/01/2012	3,5,18						
14	Resource1	Test	http://www.test.com	John Doe	01/01/2012	3,5,18						
15	Resource1	Test	http://www.test.com	John Doe	01/01/2012	3,5,18						
16	Resource1	Test	http://www.test.com	John Doe	01/01/2012	7,11,1						
17	Resource1	Test	http://www.test.com	John Doe	01/01/2012	7,11,1						
18	Resource1	Test	http://www.test.com	John Doe	01/01/2012	7,11,1						
19	Resource1	Test	http://www.test.com	John Doe	01/01/2012	7,11,1						
20	Resource1	Test	http://www.test.com	John Doe	01/01/2012	7,11,1						
21	Resource1	Test	http://www.test.com	John Doe	01/01/2012	7,11,1						
22	Resource1	Test	http://www.test.com	John Doe	01/01/2012	7,11,1						
23	Resource1	Test	http://www.test.com	John Doe	01/01/2012	7,11,1						
24	Resource1	Test	http://www.test.com	John Doe	01/01/2012	7,11,1						

5 Select the 'descriptor codes' link to download a file showing the descriptor names and descriptor codes.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
	Code	Descriptor												
1	1	Subject knowledge												
2	2	Research methods - theoretical knowledge												
3	3	Research methods - practical application												
4	4	Information seeking												
5	5	Information literacy and management												
6	6	Languages												
7	7	Academic literacy and numeracy												
8	8	Analysing												
9	9	Synthesising												
10	10	Critical thinking												
11	11	Evaluating												
12	12	Problem solving												
13	13	Inquiring mind												
14	14	Intellectual insight												

6 Use the example files as a template to create an upload file in the correct format.



	A	B	C	D	E	F	G
	Title	Description	Link	Author	Published	Descriptor	
1	CV Tips	An Example Universit	http://www.example.com/cv-tips	John Doe	01/01/2012	1,4,27	
2	Getting published	An Example Universit	http://www.example.com/getting-published	John Doe	01/01/2012	7,11,1	
3	Event - Starting out, induction	An Example Universit	http://www.example.com/training/starting	John Doe	01/01/2012	3,4,5,6,7,8	
4	Event - Planning your skills develop	An Example Universit	http://www.example.com/training/planning	John Doe	01/01/2012	12,13,14,15	
5	Event - Using the RDF Planner	An Example Universit	http://www.example.com/training/rdf-planr	John Doe	01/01/2012	3,5,18	

- 7
- Use the 'Browse' button to find your upload file on your local file system.

Import resources - preview records

Resource list file (see [here](#) for example file and [here](#) for descriptor codes.)

Choose file

resources (1).csv

PREVIEW

CANCEL

- 8
- Select the 'Preview' button to see a preview of the data to be uploaded.

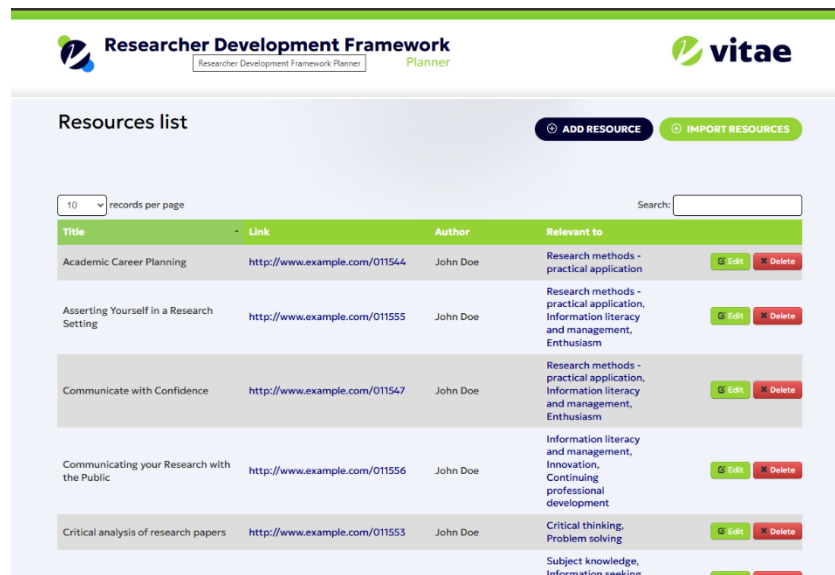
Import resources

Title	Description	Link	Author	Published	Descriptors	Audience
Researchers	http://www.test.com	01,04,27	Test1	01/01/2012 00:00:00	Vitae	Resource1
Researchers	http://www.test.com	01,03,27	Test2	01/01/2012 00:00:00	John Doe	Resource2
Researchers	http://www.test.com	01,08,27	Test3	01/01/2012 00:00:00	John Doe	Resource3

IMPORT RESOURCES

CANCEL

- 9
- If the preview fails to run successfully, repeat the process to preview your upload file again. If the preview continues to fail, carefully check the format of your comma delimited upload file. Check that your file contains the header row and that the descriptor codes are comma separated.
- 10
- Select the 'Import resources' button.
- 11
- Your imported resource links will appear in the 'Resource list'.

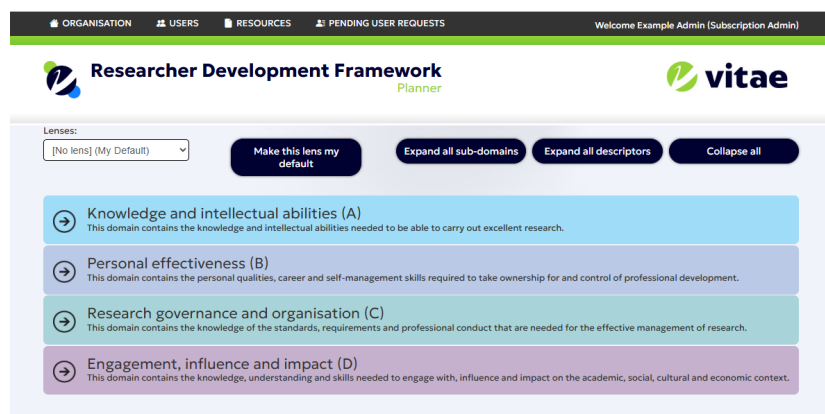


The screenshot shows the 'Resources list' page in the Vitae Researcher Development Framework Planner. At the top, there are buttons for 'ADD RESOURCE' and 'IMPORT RESOURCES'. Below these, there's a search bar and a dropdown for 'records per page' set to 10. The main content is a table with columns: Title, Link, Author, and Relevant to. Each row represents a resource with a title, a URL, the author's name, and a list of relevant descriptors. To the right of each row are 'Edit' and 'Delete' buttons.

Title	Link	Author	Relevant to
Academic Career Planning	http://www.example.com/011544	John Doe	Research methods - practical application
Asserting Yourself in a Research Setting	http://www.example.com/011555	John Doe	Research methods - practical application, Information literacy and management, Enthusiasm
Communicate with Confidence	http://www.example.com/011547	John Doe	Research methods - practical application, Information literacy and management, Enthusiasm
Communicating your Research with the Public	http://www.example.com/011556	John Doe	Information literacy and management, Innovation, Continuing professional development
Critical analysis of research papers	http://www.example.com/011553	John Doe	Critical thinking, Problem solving, Subject knowledge, Information seeking.

7.3 Viewing organisation resource links as a user sees

- 1 As an organisation administrator, you can view how a user at your organisation will view a resource link that has been added to the resource list.
- 2 Make a note of which descriptor/s the resource has been mapped to.
- 3 Select the 'View RDF as a researcher' tile/box on the organisation administrator home page. The RDF tree view will open.

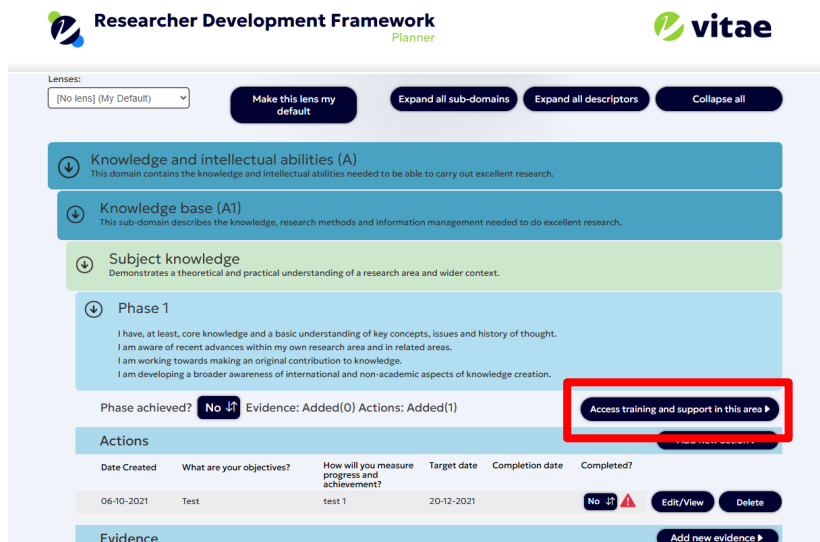


The screenshot shows the 'RDF tree view' in the Vitae Researcher Development Framework Planner. At the top, there's a navigation bar with 'ORGANISATION', 'USERS', 'RESOURCES', and 'PENDING USER REQUESTS'. Below this, there's a 'Lenses' dropdown set to '[No lens] (My Default)'. To the right of the dropdown are buttons: 'Make this lens my default', 'Expand all sub-domains', 'Expand all descriptors', and 'Collapse all'. The main content area displays four RDF domains, each with a circular icon and a description:

- Knowledge and intellectual abilities (A)**: This domain contains the knowledge and intellectual abilities needed to be able to carry out excellent research.
- Personal effectiveness (B)**: This domain contains the personal qualities, career and self-management skills required to take ownership for and control of professional development.
- Research governance and organisation (C)**: This domain contains the knowledge of the standards, requirements and professional conduct that are needed for the effective management of research.
- Engagement, influence and impact (D)**: This domain contains the knowledge, understanding and skills needed to engage with, influence and impact on the academic, social, cultural and economic context.

- 4 Expand the RDF tree view by clicking on the parent RDF domain and subdomain of the descriptor you wish to review until you can see one of the descriptors the resource link is

mapped to. Expand a phase under the descriptor to view the phase detail section.



Researcher Development Framework Planner

Lenses: [No lens] (My Default) [Make this lens my default](#) [Expand all sub-domains](#) [Expand all descriptors](#) [Collapse all](#)

- Knowledge and intellectual abilities (A)
 - Knowledge base (A1)
 - Subject knowledge
 - Phase 1

I have, at least, core knowledge and a basic understanding of key concepts, issues and history of thought.
I am aware of recent advances within my own research area and in related areas.
I am working towards making an original contribution to knowledge.
I am developing a broader awareness of international and non-academic aspects of knowledge creation.

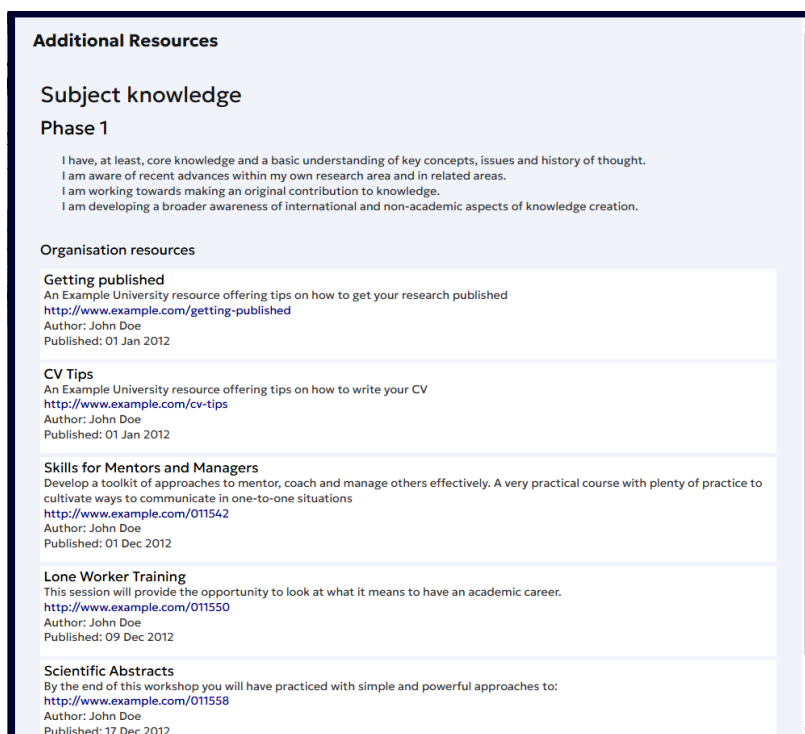
Phase achieved? **No** Evidence: Added(0) Actions: Added(1) [Access training and support in this area](#)

Actions

Date Created	What are your objectives?	How will you measure progress and achievement?	Target date	Completion date	Completed?	
06-10-2021	Test	test 1	20-12-2021		No	Edit/View Delete

Evidence [Add new evidence](#)

- Select the 'Access training and support in this area' button to view the list of organisation resource links that have been mapped to the descriptor this phase belongs to.



Additional Resources

Subject knowledge

Phase 1

I have, at least, core knowledge and a basic understanding of key concepts, issues and history of thought.
I am aware of recent advances within my own research area and in related areas.
I am working towards making an original contribution to knowledge.
I am developing a broader awareness of international and non-academic aspects of knowledge creation.

Organisation resources

Getting published
An Example University resource offering tips on how to get your research published
<http://www.example.com/getting-published>
Author: John Doe
Published: 01 Jan 2012

CV Tips
An Example University resource offering tips on how to write your CV
<http://www.example.com/cv-tips>
Author: John Doe
Published: 01 Jan 2012

Skills for Mentors and Managers
Develop a toolkit of approaches to mentor, coach and manage others effectively. A very practical course with plenty of practice to cultivate ways to communicate in one-to-one situations
<http://www.example.com/011542>
Author: John Doe
Published: 01 Dec 2012

Lone Worker Training
This session will provide the opportunity to look at what it means to have an academic career.
<http://www.example.com/011550>
Author: John Doe
Published: 09 Dec 2012

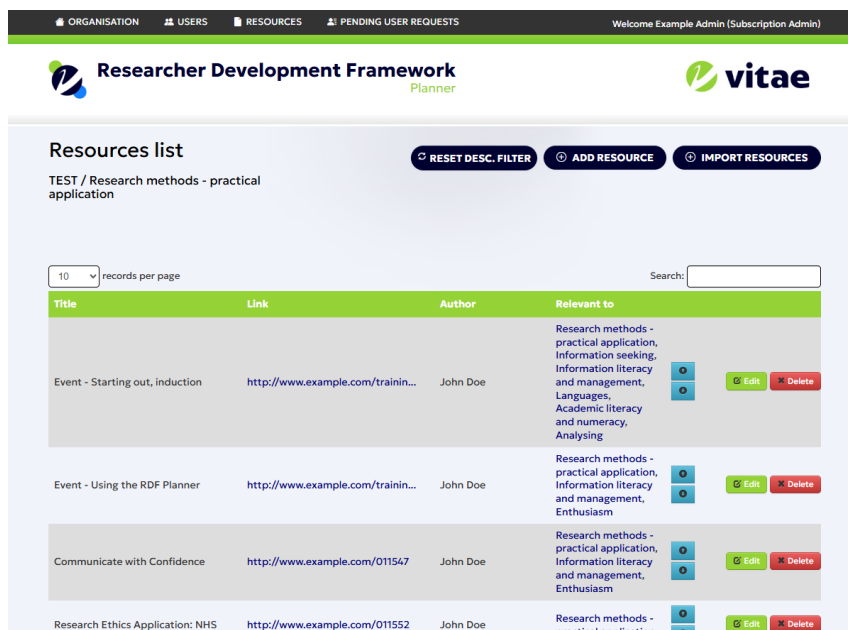
Scientific Abstracts
By the end of this workshop you will have practiced with simple and powerful approaches to:
<http://www.example.com/011558>
Author: John Doe
Published: 17 Dec 2012

This list will contain resources that Vitae has mapped to the descriptor as well as resources that you have mapped (Organisation resources). Organisation resources are only visible to the users registered to your organisation.

Vitae resources appear to all users of the RDF Planner.

7.4 Moving the position of resources

- 1 You can change the order of appearance of resources mapped to a descriptor in the RDF descriptor phase 'Additional resources' window.
- 2 Select the 'Manage resource links' tile/box on the organisation administrator home page or the 'Resources' menu option in the organisation administrator header. The 'Resource list' window will open.
- 3 The descriptor titles in the 'Relevant to' column are hyperlinks. Select the descriptor hyperlink for the descriptor whose resource links you want to re-order. The 'Resource list' changes to show all the resource links mapped to the selected descriptor.



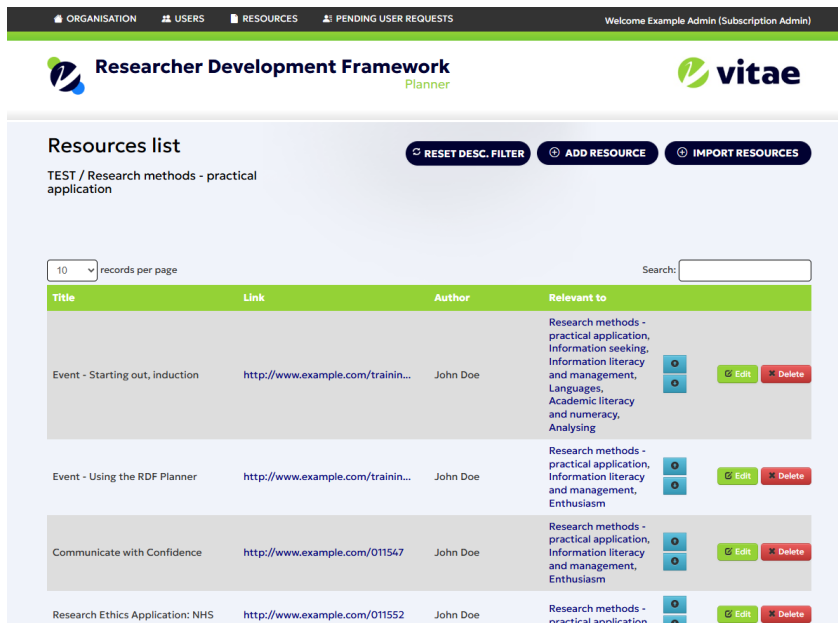
The screenshot shows the 'Resources list' interface in the Vitae Researcher Development Framework Planner. The top navigation bar includes 'ORGANISATION', 'USERS', 'RESOURCES', and 'PENDING USER REQUESTS'. The main header shows 'Researcher Development Framework Planner' and the 'vitae' logo. The 'Resources list' section has buttons for 'RESET DESC. FILTER', 'ADD RESOURCE', and 'IMPORT RESOURCES'. Below these is a search bar and a table of resources. The table has columns for 'Title', 'Link', 'Author', and 'Relevant to'. The 'Relevant to' column contains hyperlinks to specific descriptors. To the right of each descriptor link are 'up' and 'down' arrows for re-ordering, and 'Edit' and 'Delete' buttons.

Title	Link	Author	Relevant to
Event - Starting out, induction	http://www.example.com/trainin...	John Doe	Research methods - practical application, Information seeking, Information literacy and management, Languages, Academic literacy and numeracy, Analysing
Event - Using the RDF Planner	http://www.example.com/trainin...	John Doe	Research methods - practical application, Information literacy and management, Enthusiasm
Communicate with Confidence	http://www.example.com/011547	John Doe	Research methods - practical application, Information literacy and management, Enthusiasm
Research Ethics Application: NHS	http://www.example.com/011552	John Doe	Research methods - practical application

- 4 Use the 'up' and 'down' arrows with a blue background to the right of the 'Descriptor' column to move the resources to the desired positions.
- 5 Use the 'Reset desc filter' button to restore the resource list to show all resources.

7.5 Editing resource details and resource descriptor mapping

- 1 Select the 'Manage resources' tile/box on the organisation administrator home page or the 'Resources' menu option in the organisation administrator header. The 'Resource list' window will open.



Resources list

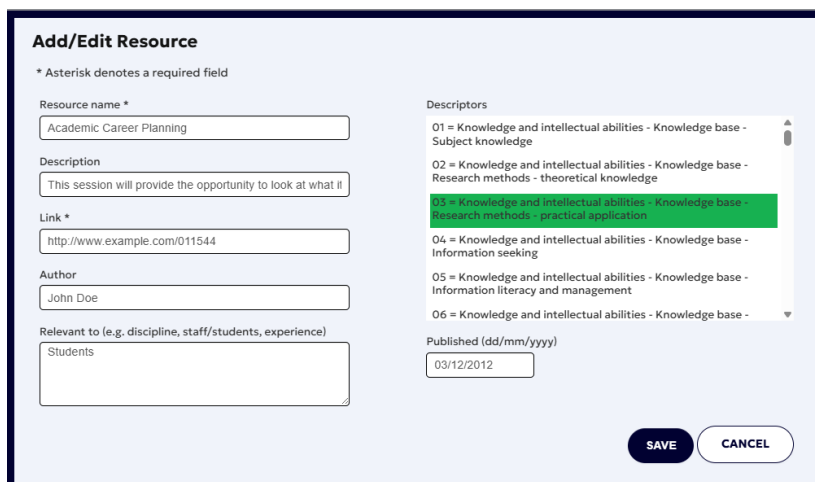
TEST / Research methods - practical application

10 records per page

Search:

Title	Link	Author	Relevant to
Event - Starting out, induction	http://www.example.com/trainin...	John Doe	Research methods - practical application, Information seeking, Information literacy and management, Languages, Academic literacy and numeracy, Analysing
Event - Using the RDF Planner	http://www.example.com/trainin...	John Doe	Research methods - practical application, Information literacy and management, Enthusiasm
Communicate with Confidence	http://www.example.com/011547	John Doe	Research methods - practical application, Information literacy and management, Enthusiasm
Research Ethics Application: NHS	http://www.example.com/011552	John Doe	Research methods - practical application

- 2 Select the 'Edit' button to the right of the resource that you want to edit. The 'Add/Edit Resource' window will open.



Add/Edit Resource

* Asterisk denotes a required field

Resource name *

Academic Career Planning

Description

This session will provide the opportunity to look at what if

Link *

http://www.example.com/011544

Author

John Doe

Relevant to (e.g. discipline, staff/students, experience)

Students

Descriptors

- 01 = Knowledge and intellectual abilities - Knowledge base - Subject knowledge
- 02 = Knowledge and intellectual abilities - Knowledge base - Research methods - theoretical knowledge
- 03 = Knowledge and intellectual abilities - Knowledge base - Research methods - practical application
- 04 = Knowledge and intellectual abilities - Knowledge base - Information seeking
- 05 = Knowledge and intellectual abilities - Knowledge base - Information literacy and management
- 06 = Knowledge and intellectual abilities - Knowledge base - Information seeking

Published (dd/mm/yyyy)

03/12/2012

SAVE CANCEL

- 3 You can change any of the fields associated with the resource link and you can change which RDF descriptors the resource link is mapped to.
- 4 Select 'Save' to exit with saved changes.

8 Step 5: Adding and inviting users

Your organisation users need to be added to the RDF Planner and sent an invitation email before they can access the application. You can add users one at a time or you can prepare a .csv (comma delimited) file containing your user information and use this file to bulk upload your users on to the RDF Planner.

You can ask the RDF Planner to send the invitation email when the user is added to the RDF Planner, or you can return to the RDF Planner and send this email at a later time.

The process for the end user is:

- Receive an automatically generated email from organisation administrator inviting me to use the RDF Planner
- Select the system generated unique invitation link in the email
- Browser screen opens presenting options for logging on to the RDF Planner
- Select preferred login option
- Arrive at registration page requesting user profile information and requiring agreement with Terms and Conditions, Privacy Policy and Cookie Policy
- Complete and submit user profile information form to be taken to the RDF Planner user home page

Example of automatically generated user invitation email.



Researcher Development Framework Planner

Dear Example,

Welcome to the Vitae Researcher Development Framework (RDF) Planner.

The RDF Planner complements organisations' professional development provision for researchers, based on the Vitae RDF. An organisational subscription will enable organisations to:

- combine the benefits of the Vitae RDF with existing organisational resources
- support professional development planning for all your researchers based on benchmarks set by your university
- create a personal record of progress, backed up by evidence
- demonstrate your university's commitment to training and developing world-class researchers

The user friendly RDF Planner provides researchers with:

- a structure with which to recognise, reflect and evidence expertise, capabilities and achievements alongside career goals
- access to organisational and Vitae resources to support well rounded professional development
- structured and more objective information to discuss with managers and supervisors.

This invitation email has been sent to you by your RDF Planner organisation administrator. Please follow this link when you are ready to complete the RDF Planner user set up process:

<http://www.rdfplanner.net/david-test-institute/invite/5ac9a6ae-6f02-430d-af0c-a0ca00da6e04>

For technical or RDF support within your organisation, contact:

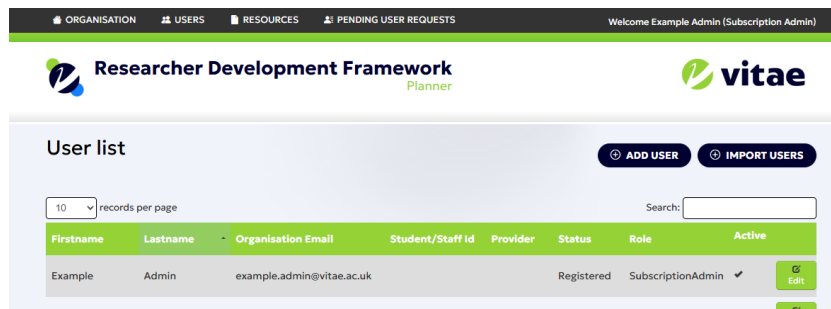
Administrator@test.org.uk

Administrator2@test.org.uk

For further technical help, contact Vitae at rdfplannerhelpdesk@vitae.ac.uk.

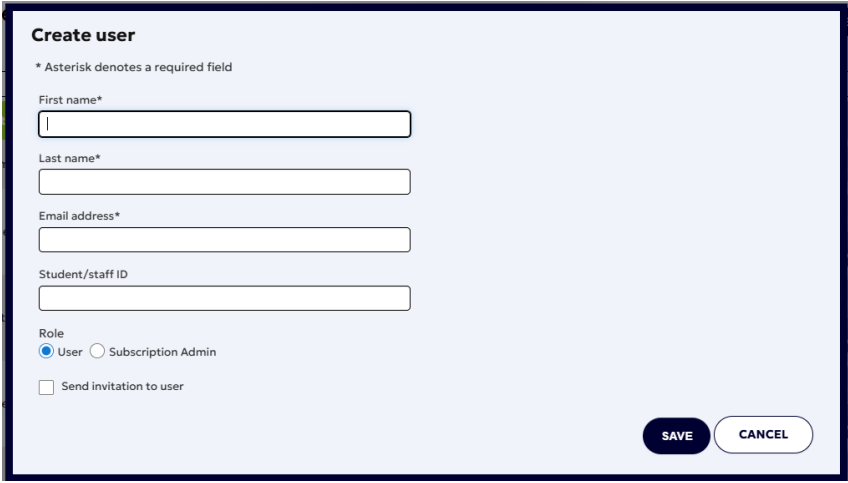
8.1 Adding a single user

- 1 Select the 'Manage users' tile/box on the organisation administrator home page or the 'Users' menu option in the organisation administrator header. The 'User list' window will open.



The screenshot shows the 'User list' interface of the Vitae RDF Planner. At the top, there is a navigation bar with tabs: ORGANISATION, USERS, RESOURCES, and PENDING USER REQUESTS. The 'USERS' tab is selected. Below the navigation bar, the 'Researcher Development Framework Planner' logo and the 'vitae' logo are displayed. The main content area is titled 'User list' and includes buttons for 'ADD USER' and 'IMPORT USERS'. Below these buttons, there is a search bar and a table of users. The table has columns: Firstname, Lastname, Organisation Email, Student/Staff id, Provider, Status, Role, and Active. A single user is listed: Example, Admin, example.admin@vitae.ac.uk, Registered, SubscriptionAdmin, with an 'Active' checkbox checked. There are also buttons for 'Edit' and 'Delete' for each user.

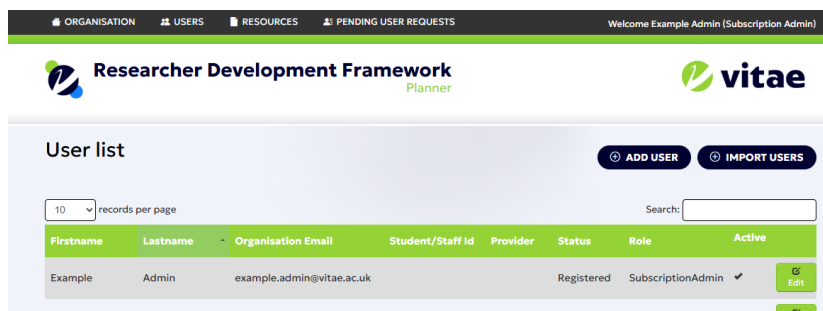
- 2 Select the 'Add user' button. The 'Create user' window will open.



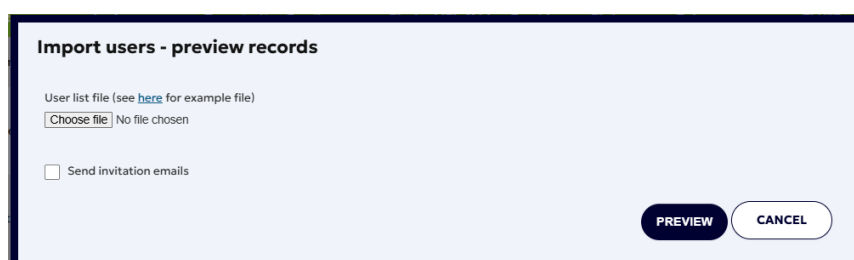
- 3 Add the user details. There is an optional 'Student/staff ID' that can act as an external reference to your organisation database.
- 4 There is the option to change the user's role to 'Subscription Admin'. Subscription admins can help you manage your organisation users and resource links but will not have access to the personal and career development aspects of the RDF Planner. You will need to create two accounts for anyone who needs to access the RDF Planner under both roles. Note, any extra organisation administrators that you create will have the same access rights as your first organisation administrator account, including the ability to add and delete users and resource links from your RDF Planner organisation subscription.
- 5 Ticking the checkbox labelled 'Send invitation to user' will prompt the RDF Planner to send out the invitation email to the users automatically once the 'Save' button is selected. Alternatively, you can leave this unselected and return to the RDF Planner at a later date to send the invitation email.
- 6 Select the 'Save' button. The user has now been added to the 'User list'.

8.2 Bulk uploading of users

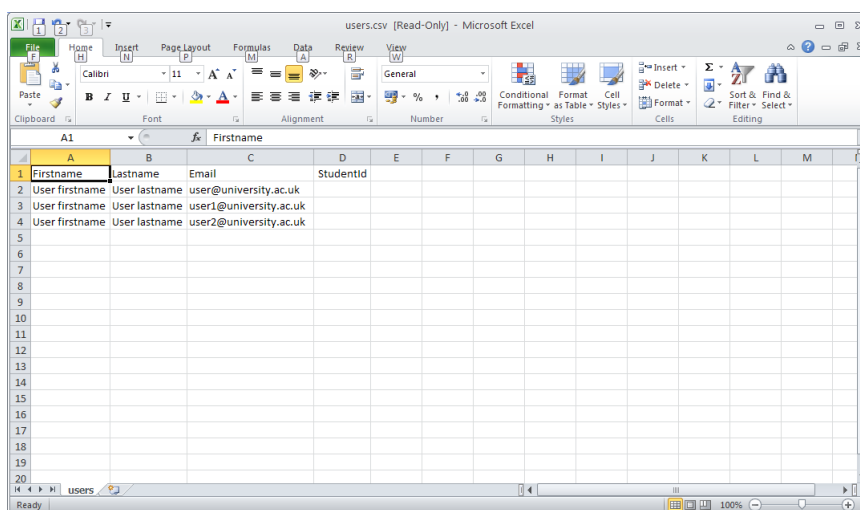
- 1 Select the 'Manage users' tile/box on the organisation administrator home page or the 'Users' menu option in the organisation administrator header. The 'User list' window will open.



- 2 Select the 'Import users' button. The 'Import users – preview records' window will open.



- 3 Select the example file link to download an example file showing the format for .csv data required for a successful import.



Tip: we recommend that you tick the option to send the automated invitation to users when performing a bulk user upload. Invitations can be sent at a later date, however, this must currently be done manually by pressing a button in each user's 'Edit' window.

- 4 Save example file locally and use as a template to create an upload file in the correct format.
- 5 Use the 'Browse' button to locate the upload file.
- 6 Decide if you want the system to send the automatic invitation email when the upload is performed or whether you want to return to the RDF Planner at a later date to perform this action.
- 7 Select the 'Preview' button to see a preview of the first few

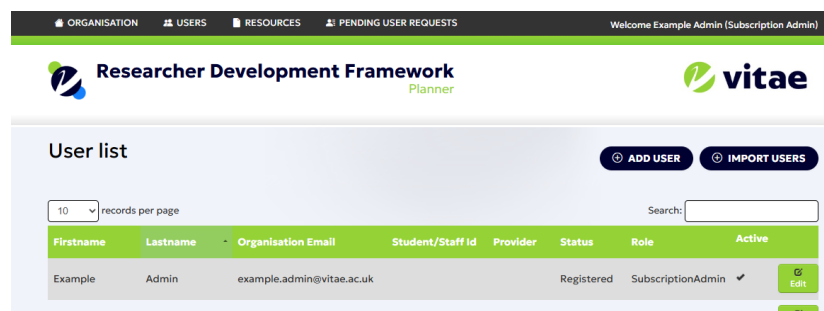
records in the upload file.

- 8 If the RDF Planner finds any email addresses in your upload file that already exists for any user of the RDF Planner, it will present you with a duplicate warning. A duplicate warning can indicate that you have duplicate records in your upload file. In this case, remove duplicates and rerun the upload. A duplicate warning can indicate that the user has an account elsewhere on the RDF Planner. In this case, contact the RDF Planner support team at rdfplannerhelpdesk@vitae.ac.uk for help to reconcile the user's duplicate subscription. You can proceed with the import meanwhile. Duplicate records are not imported.
- 9 Select 'Import users'. Users listed in the upload document are added to the 'User list' for your subscription in the RDF Planner.

9 Step 6: Managing users and subscription

9.1 Finding users

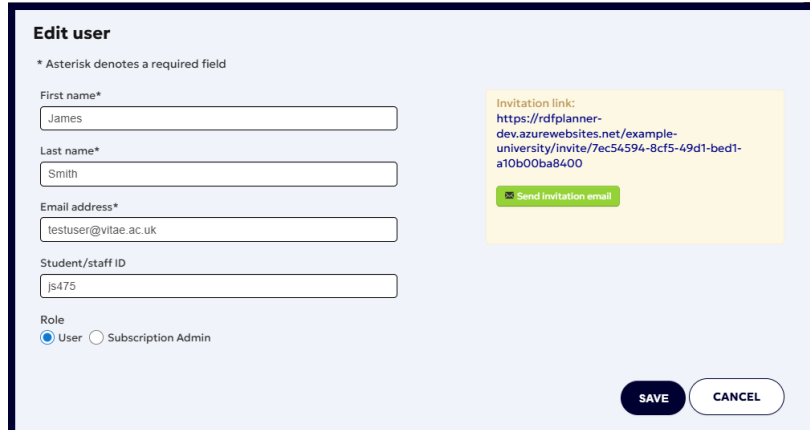
- 1 Select the 'Manage users' tile/box on the organisation administrator home page or the 'Users' menu option in the organisation administrator header. The 'User list' window will open.



- 2 You can find records in the 'User list' by:
 - re-ordering the list by selecting any column header
 - changing the number of records that are displayed in the 'records per page' drop down list at top left corner of the user list
 - searching for user by typing the user name in the 'Search' field at the top right corner or the 'User list'
 - changing which page of the 'User list' is displayed using the pagination tool in the bottom right corner of the list.

9.2 Editing user details

- 1 Find the record for the user you whose details you want to edit in the 'User list'.
- 2 Select the 'Edit' button on the right hand side of the user's record in the 'User list'. The 'Edit user' window will open.



Edit user

* Asterisk denotes a required field

First name*
James

Last name*
Smith

Email address*
testuser@vitae.ac.uk

Student/staff ID
js475

Role
☒ User ☐ Subscription Admin

Invitation link:
<https://rdfplanner-dev.azurewebsites.net/example-university/invite/7ec54594-8cf5-49d1-bed1-a10b00ba8400>

[Send invitation email](#)

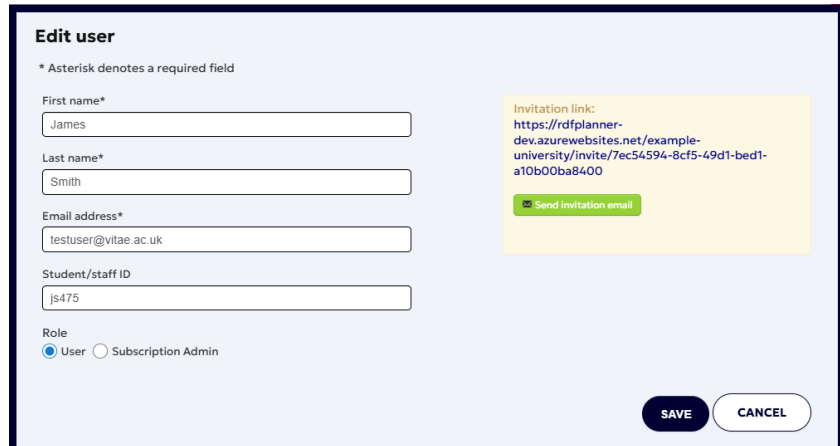
[SAVE](#) [CANCEL](#)

- 3 Use the 'Edit user' window to change user details, change user role or to send or resend the invitation email to the user.
- 4 Select the 'Save' button to action changes you have made to the record.

9.3 Sending and resending invitation emails

- 1 You can send or resend the invitation email to a user at any time.
- 2 Find the user's record in the 'User list'.

- 3 Select the 'Edit' button on the right hand side of the user's record in the 'User list'. The 'Edit user' window will open.



Edit user

* Asterisk denotes a required field

First name*
James

Last name*
Smith

Email address*
testuser@vitae.ac.uk

Student/staff ID
js475

Role
☒ User
 ☐ Subscription Admin

Invitation link:
<https://rdfplanner-dev.azurewebsites.net/example-university/invite/7ec54594-8cf5-49d1-bed1-a10b00ba8400>

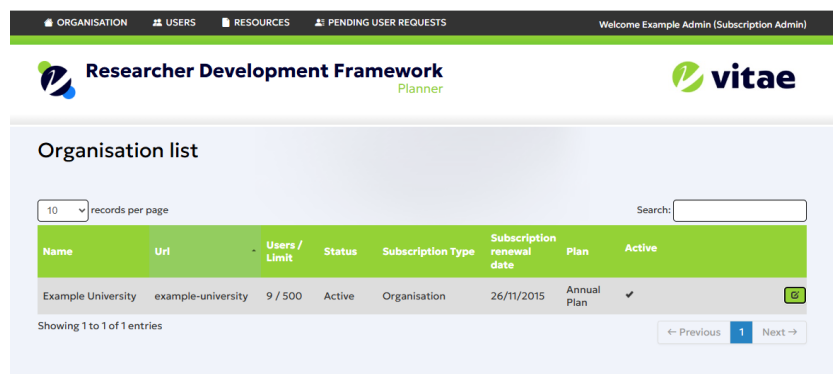
Send invitation email

SAVE CANCEL

- 4 Select the 'Send invitation email' button.
- 5 Select 'Save'.

9.4 Reviewing subscription numbers

- 1 Once you have exceeded your subscription user limit, you will be prevented from adding more users to the RDF Planner under your organisation subscription. Please contact the RDF Planner support team at 'rdfplannerhelpdesk@vitae.ac.uk' if you wish to upgrade your subscription to a the next subscription band.
- 2 Select the 'Manage subscription' tile/box on the organisation administrator home page or the 'Organisation' menu option in the organisation administrator header. The 'Organisation list' window will open.



ORGANISATION USERS RESOURCES PENDING USER REQUESTS Welcome Example Admin (Subscription Admin)

Researcher Development Framework Planner vitae

Organisation list

10 records per page Search:

Name	Uri	Users / Limit	Status	Subscription Type	Subscription renewal date	Plan	Active
Example University	example-university	9 / 500	Active	Organisation	26/11/2015	Annual Plan	✓

Showing 1 to 1 of 1 entries

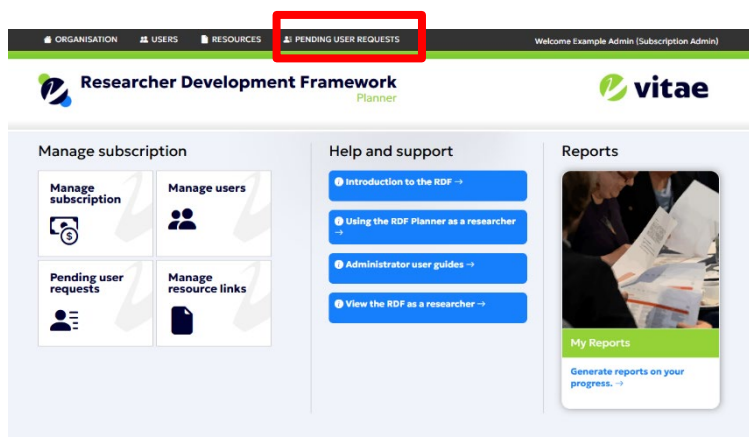
Previous 1 Next

- 3 The 'Users/Limit' column shows you your user limit and current number of users.

9.5 Processing user requests to transfer into your organisation subscription

A user can request to transfer into your organisation subscription from another organisation.

If a user requests to transfer into your organisation subscription, their request will appear in the 'Pending user request' list that can be accessed from the organisation administrator homepage menu header:



Organisation administrators can review user transfer requests and can 'Approve' or 'Cancel' (decline) user requests.

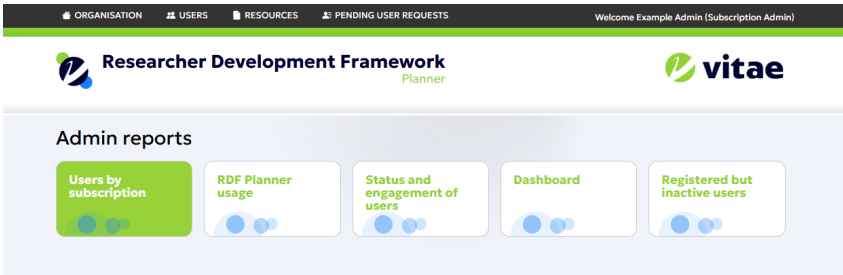
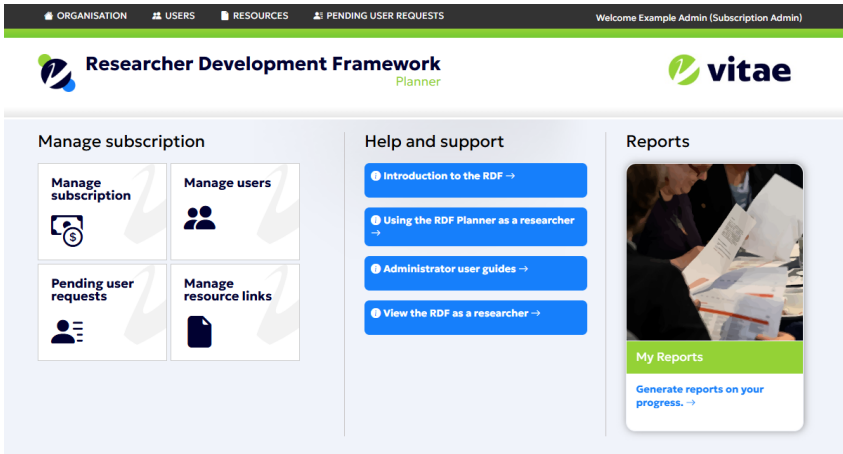
If a request is approved and the organisation user limit has not been exceeded, the user is transferred automatically into the organisation subscription. The user is sent an automatic email notification to inform them of a successful transfer.

If a request is cancelled (declined), the user is left in its current subscription. The user is sent an email notification that their request has been denied.

Please contact the Vitae RDF Planner helpdesk by emailing rdfplannerhelpdesk@vitae.ac.uk to request more information about a user requesting a transfer and to resolve problems transferring user accounts.

10 Running organisation administrator reports

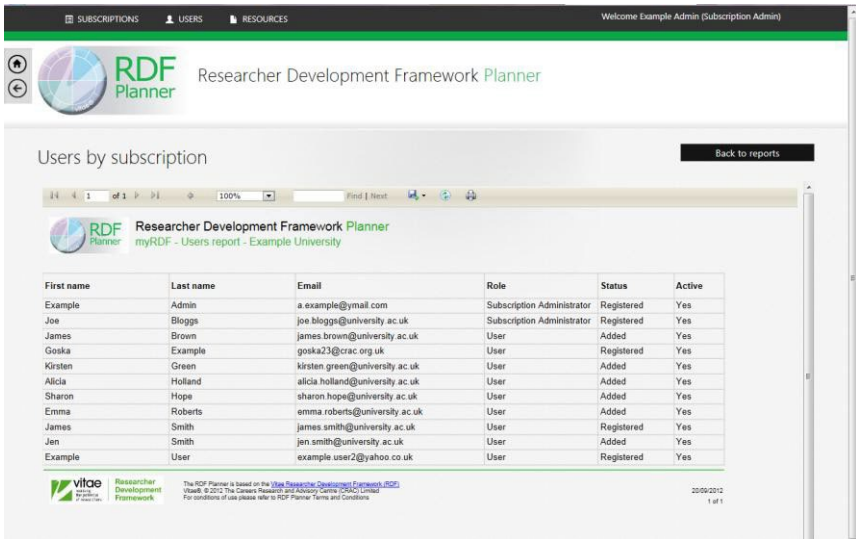
- 1 Organisation administrator reports are accessed by selecting the 'My Reports' tile/box in the 'Reports' section on the RDF Planner organisation administrator home page. The 'Admin reports' page will open.



- 2
- Selecting a report will take you to that report’s page. The report window will show as empty while the report compiles which may take a few seconds.

11.2 Users by subscription report

- 1
- The ‘Users by subscription’ report shows details for all users that have been added to your organisation’s subscription.

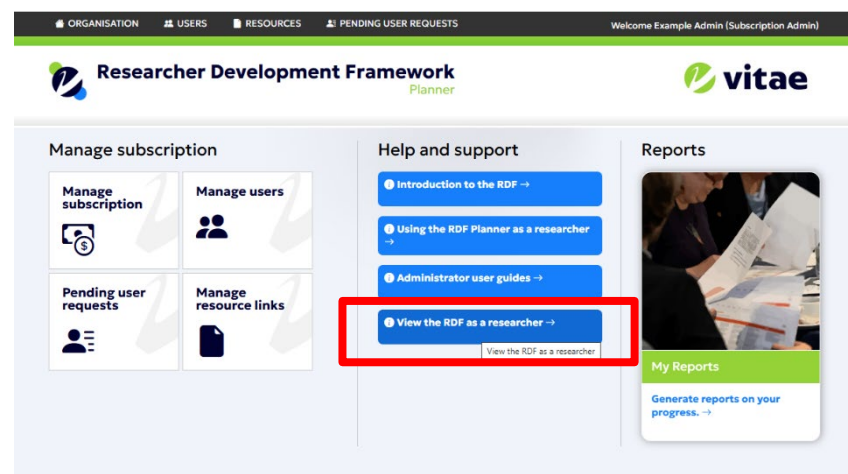


11.3 Exporting organisation administrator report data from the RDF Planner

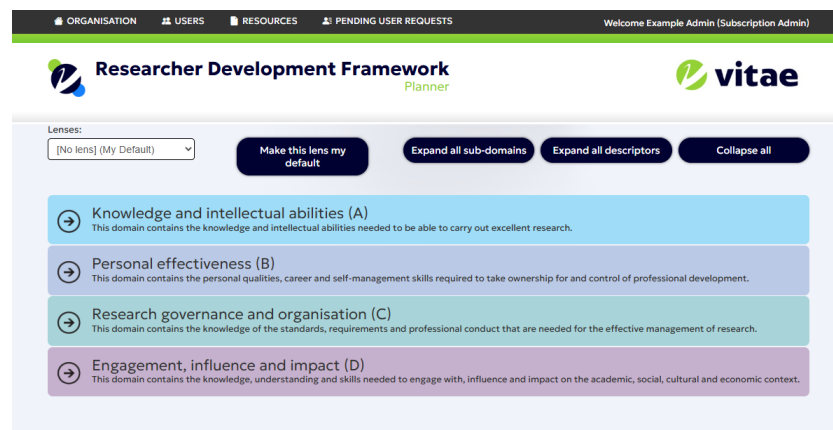
- 1 To export data, run the report that contains the data you want to export. Select the small floppy disk icon in the report header and select the file format you wish to export to from the drop down menu. Supported formats for data export are:
 - XML
 - CSV (comma delimited)
 - PDF
 - MHTML
 - Excel
 - TIFF
 - Word

11 Viewing the RDF as a researcher

It can be useful to see how a user views of the Vitae Researcher Development Framework (RDF) when they are navigating the RDF tree. You may wish to see how the resource links that you have added will appear to a user for example. Select the 'View the RDF as a researcher' tile/box in the 'Resources' section of organisation administrator home page.



A window will open displaying the RDF tree view.



- 1 Explore the tree view by selecting the rectangular areas representing the different types of RDF element.

12 Getting help

There are a number of sources to gain further information about the Vitae Researcher Development Framework (RDF) and to obtain more help in using the RDF Planner online tool.

12.1 RDF help

- Information about the RDF can be found in the 'Introduction to the RDF and user help guide'.
- Further information about the RDF can be found on the Vitae website at www.vitae.ac.uk/rdf.
- Links to a glossary of RDF terms and terms related to the area of personal development can be found in the RDF Planner footer

12.2 RDF Planner help

- To provide feedback or if you are having problems getting started or logging on to the system, adding subscription users or resource links, or with any other aspect of the RDF Planner, email the RDF Planner support team at rdfplannerhelpdesk@vitae.ac.uk.