

Clinical and Translational Science Institute

at the University of California, San Francisco

Accelerating Research to Improve Health

ctsi.ucsf.edu

User Guide for UCSF Profiles ListMaker

The ListMaker tool is a feature that enables you to quickly assemble information on a group of people based on your search results in UCSF Profiles. With a few clicks, you can send an email to a group of researchers, export email addresses and/or other directory information for them, or create a list for your Doodle Poll. Exported information can be sorted, filtered, enhanced and used for mail merge or other purposes.

1. Sign in to <u>UCSF Profiles</u> using your MyAccess credentials. You can sign in even if you do not have a profile page yourself.



2. From the Home/Search page, perform a search using research topics plus optional dropdowns to focus on a specific group – by school, department, researcher type, etc. This example looks for researchers who publish on anti-retroviral agents and are also full professors. Click the Search button after entering and/or selecting your parameters.

id Peop	le by Research 1	opic of Name
Research Topics	Anti-Retroviral Agents	Q Search
	and/or	
Last Name		
First Name		
School		T
Department		V
Researcher Type	Professor	•
More Options		•

3. Or search from any page using the search box in the menu bar.

UCSF Profiles				
		er, network	" upply	New Features: Learn more >
earch	About	Use our Data	Help / Contact Us	e.g. Smith or HIV 8

4. From the search results page, click the *Add* link in the ListMaker tool to build your list.

Sort Query Relevance	Search Criteria Anti Retroviral Agents Professor			
Name	Department	Researcher Type	Why	Search Options
Steven Deeks, MD	Medicine	Professor	Why?	Modify Search
Diane Ha∨lir, MD	Medicine	Professor	Why?	Search Other Institutions
Mallory Johnson, PhD	Medicine	Professor	Why?	ListMaker
Paul Volberding, MD	Medicine	Professor	Why?	Create a list of profiles (2) for personal use.
Donald Abrams, MD	Medicine	Professor	Why?	Add 88 profiles to list List is currently empty
Jeffrey Martin, MD, MPH	Epidemiology & Biostatistics	Professor	Why?	Locial contently empty
Eric Goosby, MD	Medicine	Professor	Why?	
Tor Neilands, PhD	Medicine	Professor	Why?	

5. When they're added, click *Go to my list*.



6. Now you'll see your list and the things you can do with it. If your list is fewer than 50 people you can click *Compose email* to start an email to them with one click. You can download contact information about this set of people, for email merge or other uses. You can paste this list into a Doodle Poll you've launched, or create a UCSF Chatter group for them. Lastly, when you're finished with your list you can clear it before you start a new one.

ListMaker			
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Email 🖍	Compose email		- 1
Open as CSV 🛓	Download Contact Info		- 1
Connect with	Create Doodle Poll 🔷 Create Cha	atter group	- 1
Manage 💼	Clear this list		- 1
Name	Title	Email Address	A
Steven Deeks, MD Diane Havlir, MD Mallory Johnson, PhD Paul Volberding, MD Donald Abrams, MD Jeffrey Martin, MD, M Eric Goosby, MD Tor Neilands, PhD Laurence Huang, MD Margaret Chesney, Ph Monica Gandhi, MD, M	Professor in Residence Professor of Clinical PH Professor in Residence Professor of Clinical Professor Professor of Clinical D Professor in Residence	Diane.Havlir@uc.sf.edu mallory.johnson@uc.sf.edu paul.volberding@uc.sf.edu Donald.Abrams@uc.sf.edu martin@psg.uc.sf.edu Eric.Goosby@uc.sf.edu torsten.neilands@uc.sf.edu Laurence.Huang@uc.sf.edu	

7. To add more people to your existing list, repeat the search steps. You can add from search results pages, an individual's profile page and the "See all" pages for co-authors and related authors.



7. If you have comments, success stories or suggestions for improvements, <u>please contact us</u>. We'd love to hear from you.