



User Manual

Welcome to Citing Insights!

Citing Insights is an unprecedented open-source citation assessment tool designed to assess information literacy. Citing Insights was developed by students working at Humboldt State University Library, thanks to funding from CSU Graduation Initiative 2025. The project began in the spring of 2019, Cindy Batres, Elizabeth Lujan, Ben Miller, Kyle Smith, and Mitchell Waters, the Citing Insights Team, working with Cyril Oberlander, Library Dean, developed this open source software to automate some of the assessment work with student papers.

This powerful tool is designed to streamline assessment of students' information literacy and other skills. It's version one release is July 31, 2020. With Citing Insights, you can upload a student paper, then all the citations are detected and the discovery of the sources are made easy. With Citing Insights, you can leverage and/or edit Association of American Colleges and Universities information literacy rubrics and other assessment rubrics to the student papers, and annotate, providing students with feedback, or providing accrediting bodies with detailed reports.

Table of Contents

| SECTION | PAGE |
|--------------------------------------|------|
| I. Quick Start..... | 2 |
| II. Login..... | 5 |
| III. Step 1: Manage Coursework..... | 5 |
| IV. Step 2: Manage Groups..... | 8 |
| V. Step 3: Manage Rubrics..... | 11 |
| VI. Step 4: Upload Student Work..... | 15 |
| VII. Step 5: Analyze..... | 16 |
| VIII. Step 6: Overview..... | 22 |
| IX. Appendix..... | 22 |








I. Quick Start

This quick guide provides details on how to use Citing Insights for assessing student papers.


Using the browser of your choice, go to: YOUR SERVER LINK

(HSU: <http://lib-citing-dev.humboldt.edu> must be on campus due to security protocols).


Note: If you experience difficulty, we recommend trying a Chrome browser.

| Instructions Individual Assessment | |
|---|--|
| Step 1: Login using gmail (campus or personal) |  |
| Step 2: Set Course & Class Assignment | <div><div><input type="checkbox"/> Application starts at Manage Courses page</div><div><input type="checkbox"/> Stay on the My Coursework Tab</div><div><input type="checkbox"/> Add New Class </div><div><input type="checkbox"/> Add New Assignment (to class) </div><div><input type="checkbox"/> Delete Assignment and/or Class </div></div> <div><div>1</div><div>Manage Courses</div></div> |
| Step 3: Manage Groups | <div><input type="checkbox"/> This step is not necessary for individual use. If you would like to utilize the groups feature in assessment please reference the next quick start guide <i>Instructions Groups</i></div> |
| Step 4: Manage Rubrics | <div><div><input type="checkbox"/> Go to Manage Rubrics</div><div><input type="checkbox"/> Stay on the My Rubrics Tab</div><div><input type="checkbox"/> Add Association of American Colleges & Universities Value Rubric: AAC&U rubric<div><input type="checkbox"/> Select desired AAC&U rubrics by clicking on them from the drop down menu</div></div><div><input type="checkbox"/> Create a new rubric <div><input type="checkbox"/> Enter how many categories for the rubric and click GO (new rubrics cannot have more than 5 categories).</div></div><div><input type="checkbox"/> Edit rubrics by clicking on the pencil icon on the edge of the rubric list </div><div><input type="checkbox"/> Delete rubrics by clicking the trash icon on the end of the rubric list </div></div> <div><div>3</div><div>Manage Rubrics</div></div> <div><div>ADD AAC&U RUBRIC</div></div> |


Step 5: Upload Student Papers

- ☐ Go to Upload Papers  Upload Papers
- ☐ Drag files into the upload and press Submit
- ☐ Or click on 'Choose Files' box and use windows to find PDF file or load a whole folder (of PDF), and press Submit

Step 6: Analyze Assignments


- ☐ Go to Analyze  Analyze
- ☐ Select Class & Assignment, press Submit
- ☐ Select Overall Paper if assessing the complete work. You can also add Citation Assessments from drop down.
 - ☐ Evaluate citations with Discovery Tool, click the tools of your choice, and Citing Insights automatically looks up that citation.
- ☐ After evaluation of citation/paper, select a rubric for citation/paper, then select rubric value (each value expands for details). You may also provide annotation if desired.
- ☐ Save Rubric Value and you can continue to evaluate citations via drop down or move on to the next paper via paper drop down.

Step 7 : Overview [Assessment Overview will download analysis of citations, rubric & annotation]







- ☐ Go to Overview  Overview
- ☐ Select Class & Assignment & Student Paper
- ☐ Click Show Evaluations

Instructions Group Assessment

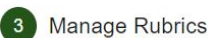



Step 2: Share course or assignment with a group(s) & view material shared

- ☐ Click the vertical more icon for the corresponding course or assignment you want to share. 
- ☐ Using the popup menu you can:
 - ☐ Stop sharing with a group by removing the group from the current group list
 - ☐ Add groups
 - ☐ See the people that have access to the shared class or assignment
- ☐ To view classes and assignments that are shared with you simply click the shared coursework tab



Step 3: Manage Groups

- ❑ Go to Manage Groups 
- ❑ Create a New Group 
- ❑ Edit Group 
- ❑ Delete Group 
- ❑ Look at groups you are a member of 
- ❑ Request to be a group of 

Step 4: Manage Rubrics

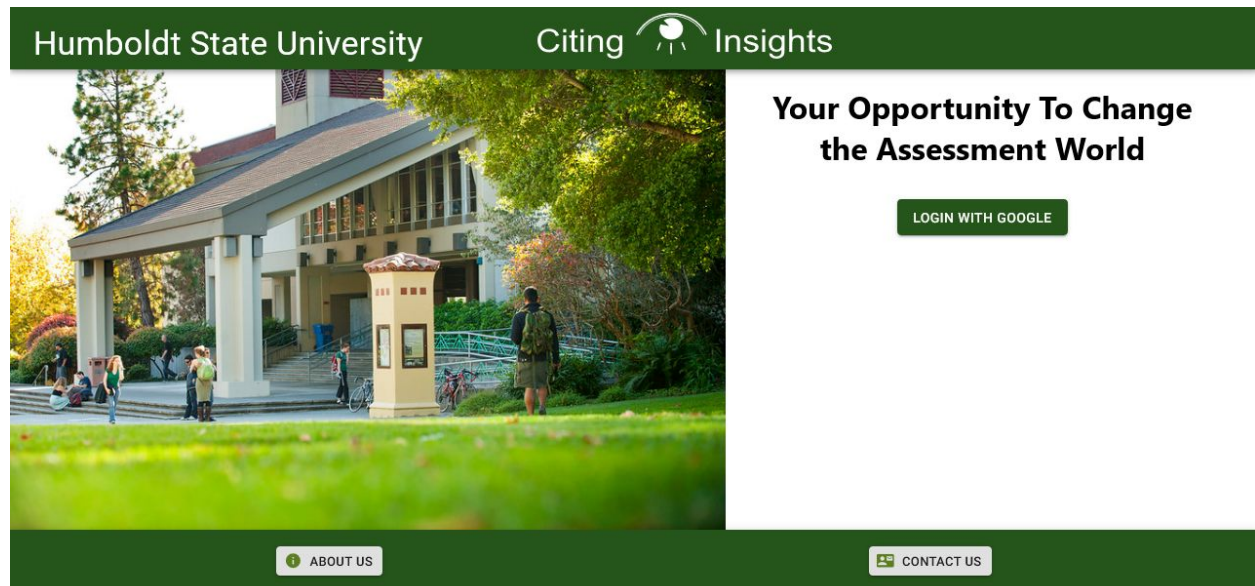
- ❑ Go to Manage Rubrics 
- ❑ Click the vertical more icon for the corresponding rubric you want to share. 
- ❑ Using the popup menu you can:
 - ❑ Stop sharing with a group by removing the group from the current group list,
 - ❑ Share with another group, or
 - ❑ See the people that can use the rubric
- ❑ To see a list rubrics that are shared with you simply click the rubrics shared with me tab 
- ❑ To view the rubric content click on the view icon button to the corresponding rubric 

Step 7 : Overview [Assessment Overview will download analysis of citations, rubric & annotation]

- ❑ Go to Overview 
- ❑ Click on the By Group tab 
- ❑ Select the group you wish to view assessments for
- ❑ Click Show Evaluations 

II. Login

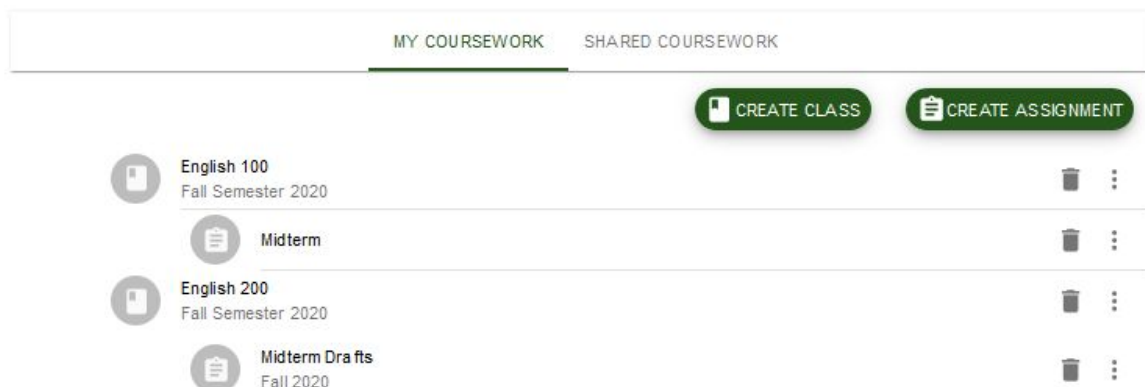
Using your gmail account login to the web application



III. Step 1: Manage Coursework

The manage coursework page is the starting place for the Citing Insights Application. By default, users are directed to view a list of courses and assignments that the user created. Each list item contains a trash icon and a vertical expand icon. Clicking the trash icon will delete the corresponding list item. Clicking the vertical expand icon displays the group menu. The features of this icon will be explained later in this section. To create a class or assignment click on their corresponding button. Clicking the shared coursework tab will display a similar list of courses and or assignments that are being shared with the user via group connections.

Manage Coursework



Manage Coursework

MY COURSEWORK

SHARED COURSEWORK



English 100
Fall Semester 2020: Dr. Brown

A. Create Class

To create a class fill out the required information on the create class popup window. Required items are marked by an asterisk.

Create Class

Class Name *

Notes (optional)

SUBMIT

B. Create Assignment

To create a class fill out the required information on the create class popup window. Required items are marked by an asterisk.

Create Assignment

Select a Class
English 100

Assignment Name *

Notes (optional)

SUBMIT

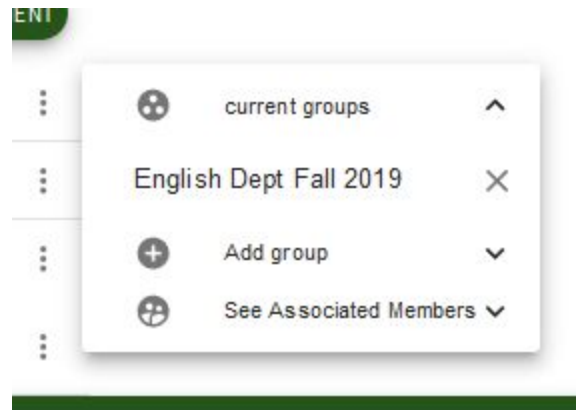
C. Group Menu

By clicking the vertical expand icon (three dots) the group menu will popup. From this menu you can see the groups that have access to this class or assignment, grant a

group access to a class or assignment, or view a list of user emails that can see that class or assignment.

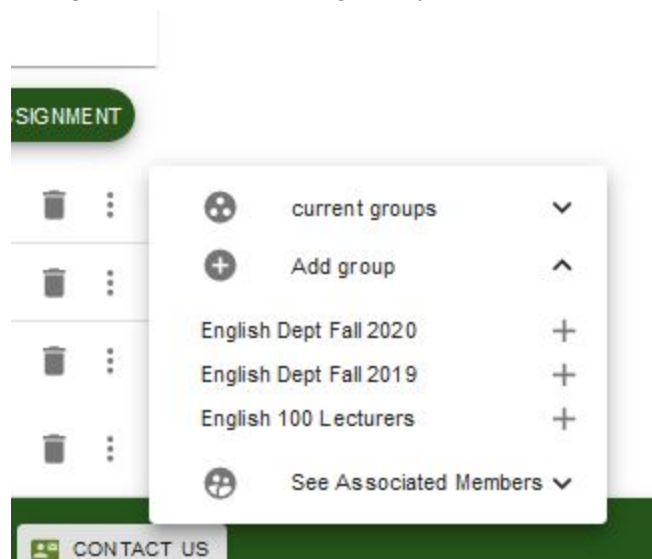
1. See Current Groups

To revoke a group access from an class or assignment then click the x on the right hand side of the group you want to delete.



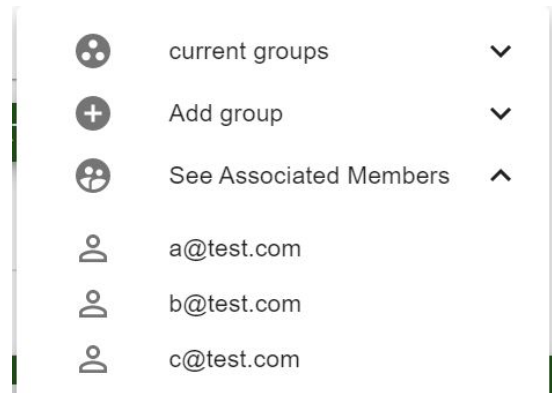
2. Add Group

To grant a group access to a class or assignment then click the + on the right hand side of the group you want to add.



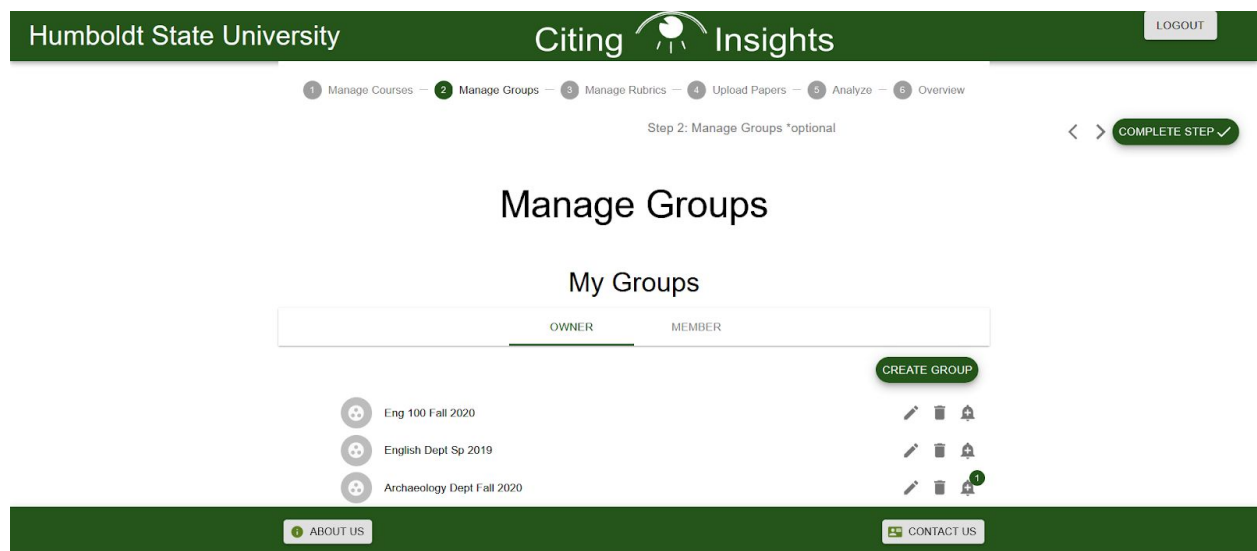
3. See Associated Members

There are no actions for this list. It is simply a list of emails representing various group members that have access to the class or assignment.



IV. Manage Group

The manage groups page is where users can view a list of groups that they created or are members of. On the my groups tab, a user can create a group, edit a group, delete a group, and see any requests to join the group. On the member tab, the user can view a list of groups that they are members of as well as request to become a member of another group.



A. Create a Group

This form requires the user to enter a group name. Member emails are best entered with a carriage return (ENTER) to separate emails. Once all the required information has been entered, click submit to create the group. Once the submit button has been entered the popup form will automatically close.

Create Group

Group Name *

Description (optional)

Member Emails

SUBMIT

B. Edit a Group

Clicking the pencil icon from the group list will activate the edit group form. To change the group name or group owner simply click on those fields and type the desired changes. To remove a member from the group, click the trash icon beside the email address of the member you wish to remove. To add a member type the email address of the member you wish to add. To add multiple emails, type the desired email address separated by a carriage return.

Edit Group

Group Name *
Eng 100 Fall 2020

Current Owner
elizabeth.lujan7676@gmail.com

Current Description

a@test.com

b@test.com

c@test.com

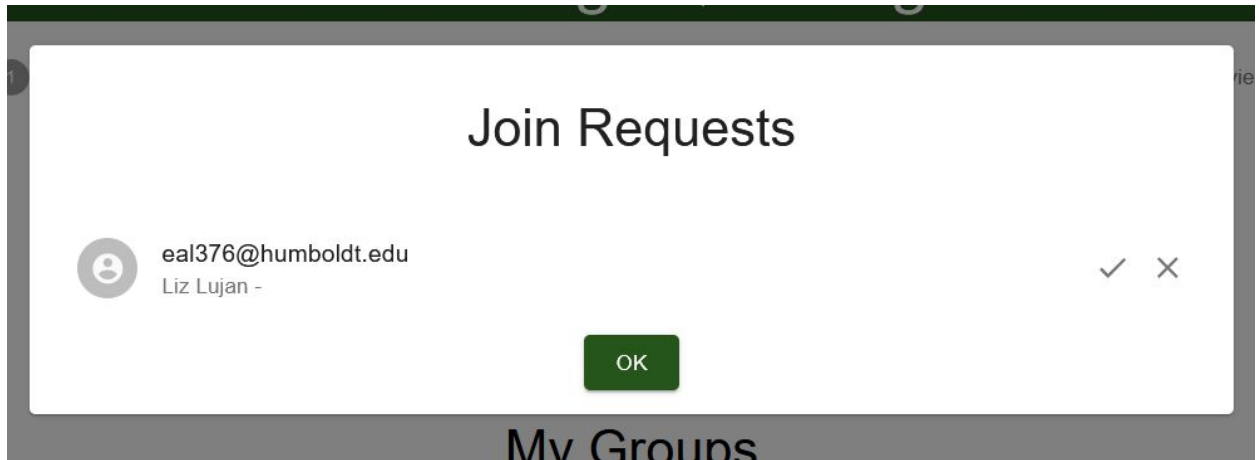
Add Member (by Emails)

SUBMIT

C. Join Requests

Group owners may receive requests to join a group. A request will be indicated

by a badge with the number of requests besides the bell icon on the my groups list. Clicking the bell icon will trigger the join requests popup. Displayed in the popup is the email of the requester with a check mark to accept the request and an x mark besides each requester email. Clicking the check mark will add that individual to the group and clicking the x mark will reject the request. Once you are done, you can click the OK button or click anywhere outside the popup to close.



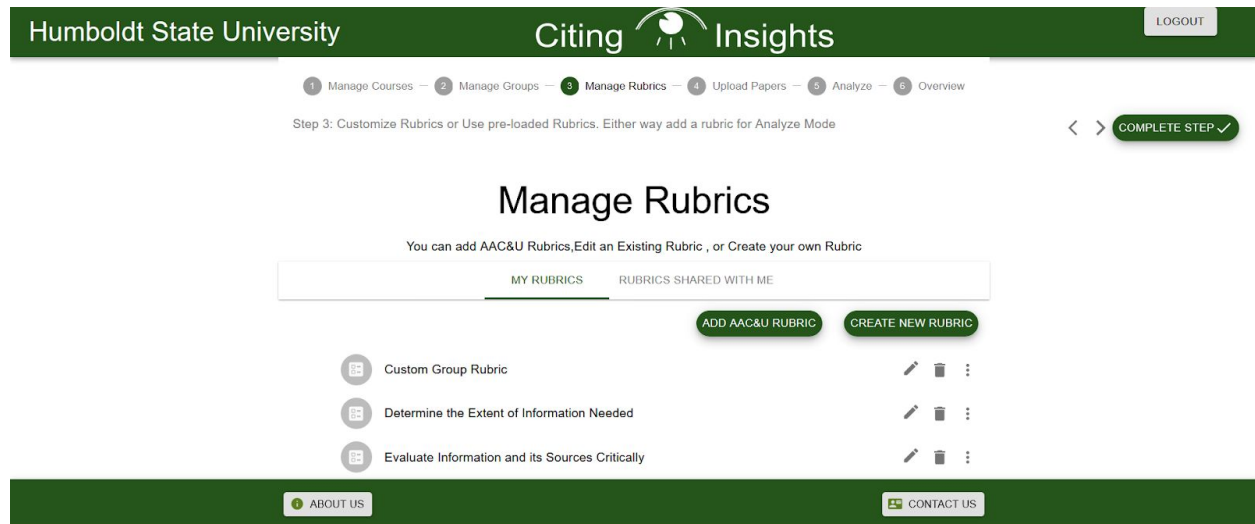
D. Request Group

From the member tab on the groups page, a user can request to join an existing group. After clicking the request group button you can select which group you want to request from a drop down menu. Then you can add your name and message if you would like.

A screenshot of a 'Request Group' form. At the top, there is a dropdown menu with the placeholder text 'Select a Group'. The dropdown is open, showing four options: 'Eng 100 Fall 2020', 'English Dept Sp 2019', and 'Archaeology Dept Fall 2020'. Below the dropdown are two text input fields: 'Name' and 'Message (optional)'. At the bottom of the form is a green button labeled 'SUBMIT'. In the bottom right corner of the page, there is a green button labeled 'REQUEST'.

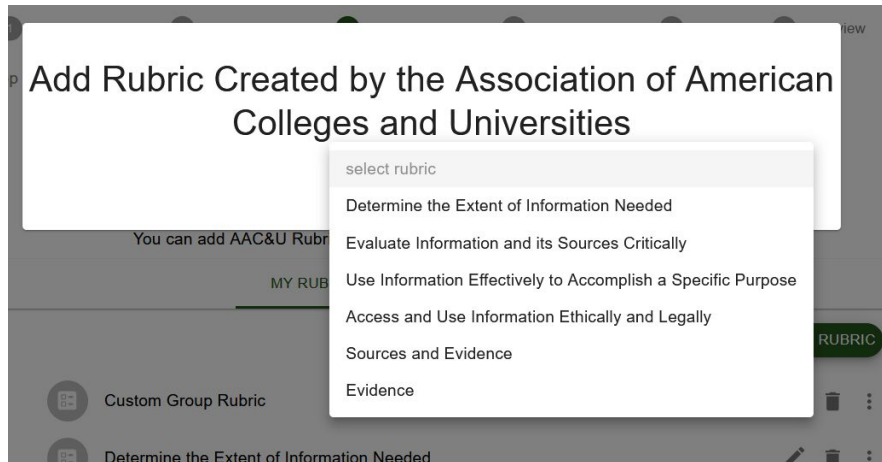
V. Manage Rubrics

The manage rubrics page is where you can view the rubrics that you own and rubrics that are being shared with you. On the my rubrics tab you can edit a particular rubric by clicking the pencil icon beside the rubric you wish to edit. Clicking the trash icon will delete a rubric from the database. It is important to know that deleting a rubric that is shared with a group will result in the rubric being deleted for all members of the group. The vertical expand icon (three dots) opens a group menu similar to the menu on the manage courses page. The features of the menu will be explained later in this section.



A. Add American Association of Colleges and Universities (AAC&U) Rubric

In Citing Insights a user can automatically add one of our default rubrics created by the American Association of Colleges and Universities. To view the list click on the add AAC&U Rubric button and click on the select drop down. To add the rubric click on the title you want to add. Once you have added all the default rubrics desired, then click the shaded area to close the popup window.




B. Create New Rubric

If you do not want to use the AAC&U default rubrics then you can create a new rubric. After clicking the create new rubric button a small popup window will appear asking how many rubric items needed (1 to 5 items or elements allowed). Once a number between 1 and 5 is entered click go to be brought to the create rubric page.

A screenshot of a "Create New Rubric" form. The title "Create New Rubric" is centered at the top. Below it, a subtitle reads "Rubric should not have more than 5 Elements". There is a text input field labeled "Number of Elements (1-5)" with a dropdown arrow icon. Below the input field, the text "Number of Elements (1-5)" is repeated. At the bottom, there is a green button labeled "GO".

On the create rubric page simply fill in all the fields of the page with your desired rubric information. Once all the information has been entered click the save button on the upper right hand side. A popup window will confirm your submission.

Humboldt State University
Citing  Insights
LOGOUT

1 Manage Courses — 2 Manage Groups — 3 Manage Rubrics — 4 Upload Papers — 5 Analyze — 6 Overview

Step 3: Customize Rubrics or Use pre-loaded Rubrics. Either way add a rubric for Analyze Mode

GO BACK TO RUBRIC MENU

< > COMPLETE STEP ✓
SAVE

Rubric Title

Rubric Item Title *Rubric Item Score *

Rubric Item Description *

Rubric Item Title *Rubric Item Score *

Rubric Item Description *

Rubric Item Title *Rubric Item Score *

Rubric Item Description *

ABOUT USCONTACT US

C. Edit Rubric

Clicking on the pencil icon next to a rubric displayed on the my rubrics list will trigger a popup window where changes can be made to the current rubric data. Changes can be made to the rubric title and any rubric item data (rubric item title, score, and description) simply by clicking the text you want to change and making edits. Once all changes have been made click the save button on the upper right corner. A pop up window will confirm your submission. Any changes made before saving will be lost.

Humboldt State University
Citing Insights
LOGOUT

1 Manage Courses
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Step 3: Customize Rubrics or Use pre-loaded Rubrics. Either way add a rubric for Analyze Mode

GO BACK TO RUBRIC MENU

COMPLETE STEP ✓
SAVE

Rubric Title
Determine the Extent of Information Needed

Rubric Item Title *
Capstone 4

Rubric Item Score *
4

Rubric Item Description *
Effectively defines the scope of the research question or thesis. Effectively determines key concepts. Types of information (sources) selected directly relate to concepts or answer research question

Rubric Item Title *
Milestone 3

Rubric Item Score *
3

Rubric Item Description *
Defines the scope of the research question or thesis completely. Can determine key concepts. Types of information (sources) selected relate to concepts or answer research question.

Rubric Item Title *
Milestone 2

Rubric Item Score *
2

Rubric Item Description *
Defines the scope of the research question or thesis incompletely (parts are missing, remains too broad or too narrow, etc.). Can determine key concepts. Types of information (sources) selected partially relate to concepts or answer research question.

Rubric Item Title *
Benchmark 1

Rubric Item Score *
1

Rubric Item Description *
Has difficulty defining the scope of the research question or thesis. Has difficulty determining key concepts. Types of information (sources) selected do not relate to concepts or answer research question.

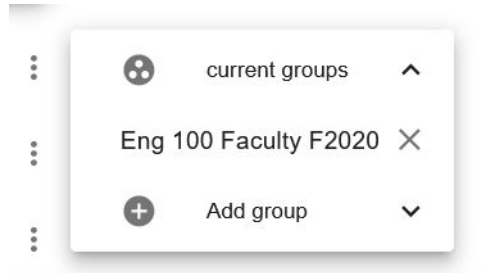
ABOUT US
CONTACT US

D. Group Menu (Rubrics)

By clicking the vertical expand icon (three dots) the group menu for rubrics will popup. From this menu, you can see the groups that have access to the particular rubric or grant a group access to the rubric.

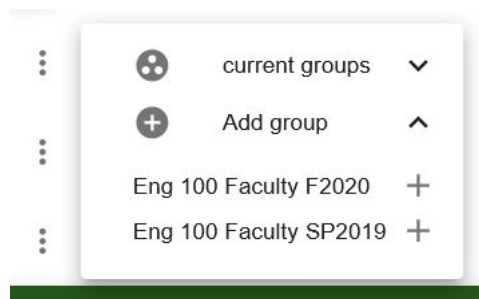
1. See Current Groups

Upon clicking the groups button on the rubrics list, a list of current groups will be displayed. To revoke a group access from a rubric then click the x on the right hand side of the group you want to delete.



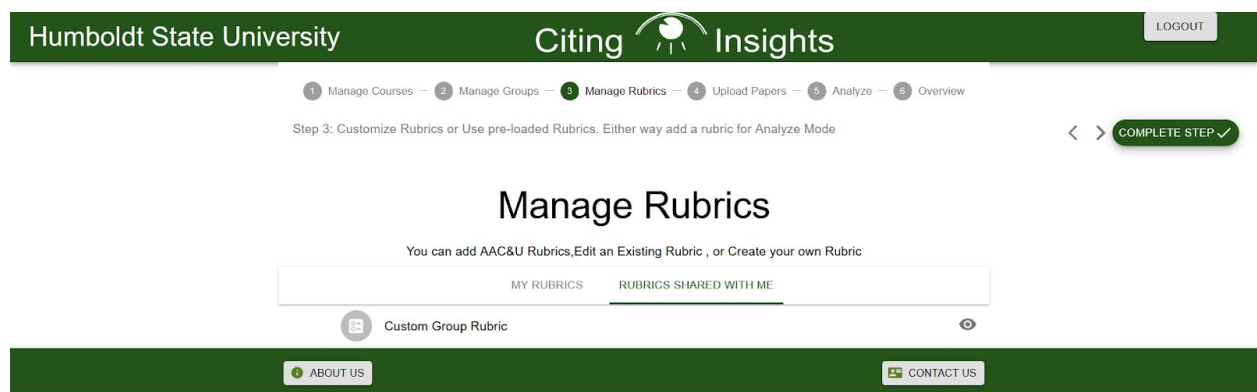
2. Add Group

To grant a group access to a class or assignment then click the + on the right hand side of the group you want to add. It is important to mention that you are only able to add from groups that you are already a member to.



E. Rubrics shared with me

Clicking on the rubrics shared with me tab will display a similar list to what is shown on my rubrics. A list will be displayed showing all the rubrics that were created by other users and shared with you via group associations. These rubrics cannot be edited or deleted (those rights are reserved for the creators) but they can be viewed by clicking on the view icon on the right hand side of the rubric in the list.



VI. Upload Papers

To upload a paper(s) select a class or assignment you want the documents to be associated with. Remember group access to these papers is based on permissions given on the

manage courses page (step 1). Then drag and drop or open your device's file explorer to select documents to upload. (Note: The documents cannot be renamed or moved after upload at this time). A list of documents uploaded to the class or assignment is located below the file selection box. After all files have been selected click upload. Once all documents have been uploaded a notification will appear on screen indicating so.

1 Manage Courses — 2 Upload Papers — 3 Manage Rubrics — 4 Analyze — 5 Overview — 6 Manage Groups

Step 2: Upload Student Papers

Upload Files

Please upload papers as PDF

Select a Class

English 100

OR

Select an Assignment

Browse... RoboticDivide.pdf

Files to Upload

RoboticDivide.pdf

UPLOAD

ABOUT US CONTACT US

VII. Analyze

The analyze page is where assessment is done. After selecting a particular citation to assess on the select a citation drop down, you can use the discovery tool to check the validity of the citation. Then using select any rubric created by or shared with you from the rubric drop down to assess the citation. You can also add an annotation for the rubric score if desired. Once you have finished with a citation click the save rubric value button. This will save the score and annotation for the citation selected. (This can be accessed later in the Overview page).

A. Paper(s) Selection

To start analyzing papers that were uploaded, select the class or assignment that was used when uploading the files or that were shared with you via group connections. Once selected, click on the submit button. This will take you to the page used for assessment.

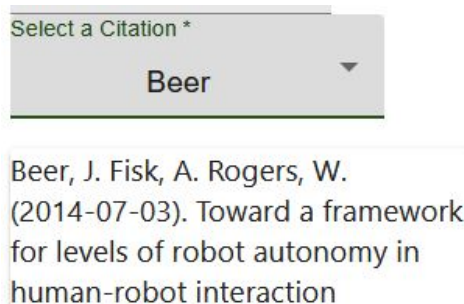
B. Navigation on Analyze

1. **Go Back:** This button will take you back to the analyze sub menu described above.
2. **Select a Paper:** This drop down will change the paper displayed in the pdf viewer. The paper displayed in the pdf viewer is displayed in the box labeled select a paper after the paper list has collapsed. Changing a paper will, consequently, update all the other tools on the analyze page regarding citations.

C. Citation Selection & Display

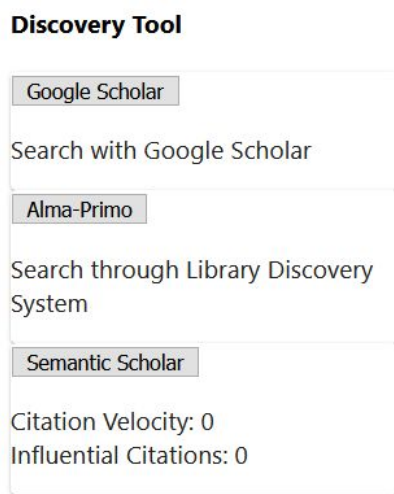
This drop down menu contains all the citations discovered when the file was uploaded. The default value is overall paper assessment (essentially to evaluate all citations). **For group evaluation the only thing citation used in the overview report is overall paper assessment.** Citations listed in the student paper are displayed by the first author listed in the bibliography. Changing the selected citation will update the information in the discovery tool as well as the complete display underneath the drop down.

Below the drop down menu is the citation displayed with its complete information: all authors, the date of the work, and work title.



D. Discovery Tool

The Discovery tool will search Semantic Scholar, Alma Primo, and Google Scholar for the source associated with the selected citation. To access this information simply click on the hyperlink text labeled Semantic Scholar, Alma Primo (HSU Library OneSearch), or Google Scholar.



1. Semantic Scholar

Citing Insights, where applicable, shows the **citation velocity** and number of **influential citations** from Semantic Scholar on the Analyze page.

Influential citations: “Semantic Scholar identifies citations where the cited publication has a significant impact on the citing publication, making it easier to understand how publications build upon and relate to each other. Influential citations are determined utilizing a machine-learning model analyzing a number of factors including the number of citations to a publication, and the surrounding context for each.”

Citation velocity: “Citation Velocity is a weighted average of the publication’s citations for the last 3 years and fewer for publications published in the last year or two, which indicates how popular and lasting the publication is.”

Clicking on the Semantic Scholar button in the Discovery Tool, you will be brought to that source in Semantic Scholar.

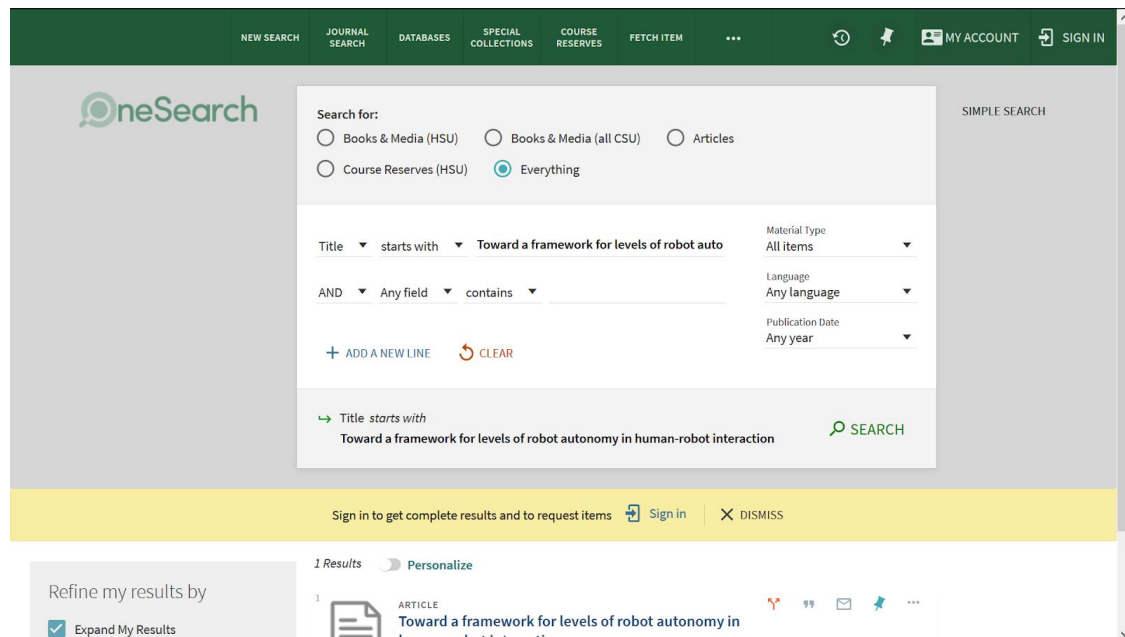
The screenshot shows the Semantic Scholar search results page. The search query is "Beer Toward a framework for levels of robot autonomy in". The results are sorted by Relevance. The top result is "Toward a framework for levels of robot autonomy in human-robot interaction." by Jenay M. Beer, Arthur D. Fisk, and Wendy A. Rogers, published in the Journal of human-robot interaction in 2014. The abstract states: "A critical construct related to human-robot interaction (HRI) is autonomy, which varies widely across robot platforms. Levels of robot autonomy (LORA), ranging from teleoperation to fully autonomous... (More)". The result has 4 citations and 18 likes. Other results include "Human-Robot Interaction: A Survey" by Michael A. Goodrich and Alan C. Schultz (2007) and "A robust layered control system for a mobile robot" by Rodney A. Brooks (1986). A "Start Your Personalized Research Feed" banner is on the right, and a "Results by year" chart shows a peak in citations around 2019. At the bottom, there is a blue bar with the text "By clicking accept or continuing to use the site, you agree to the terms outlined in our Privacy Policy, Terms of Service, and Dataset License" and an "ACCEPT & CONTINUE" button.

Click on the links to view the source. Semantic Scholar then displays data on the citation.

The screenshot shows the Semantic Scholar paper page for the paper "Toward a framework for levels of robot autonomy in human-robot interaction." by Jenay M. Beer, Arthur D. Fisk, and Wendy A. Rogers, published in the Journal of human-robot interaction in 2014. The DOI is 10.5898/jhri.3.2.beer. The abstract states: "A critical construct related to human-robot interaction (HRI) is autonomy, which varies widely across robot platforms. Levels of robot autonomy (LORA), ranging from teleoperation to fully autonomous systems, influence the way in which humans and robots may interact with one another. Thus, there is a need to understand HRI by identifying variables that influence - and are influenced by - robot autonomy. Our overarching goal is to develop a framework for levels of robot autonomy in HRI. To reach... CONTINUE READING". The page has buttons for "VIEW PDF", "SAVE TO LIBRARY", "CREATE ALERT", and "CITE". On the right, there is a "Share This Paper" button and a "65 Citations" section with a breakdown: 4 Highly Influenced Papers, 47 Cite Background, 11 Cite Methods, and 1 Cite Results. Below the abstract, there is a navigation bar with tabs: "ABSTRACT", "FIGURES, TABLES, AND TOPICS", "PAPER MENTIONS", "65 CITATIONS", "89 REFERENCES", and "RELATED PAPERS". The "FIGURES, TABLES, AND TOPICS" tab is selected. At the bottom, there is a blue bar with the text "By clicking accept or continuing to use the site, you agree to the terms outlined in our Privacy Policy, Terms of Service, and Dataset License" and an "ACCEPT & CONTINUE" button.

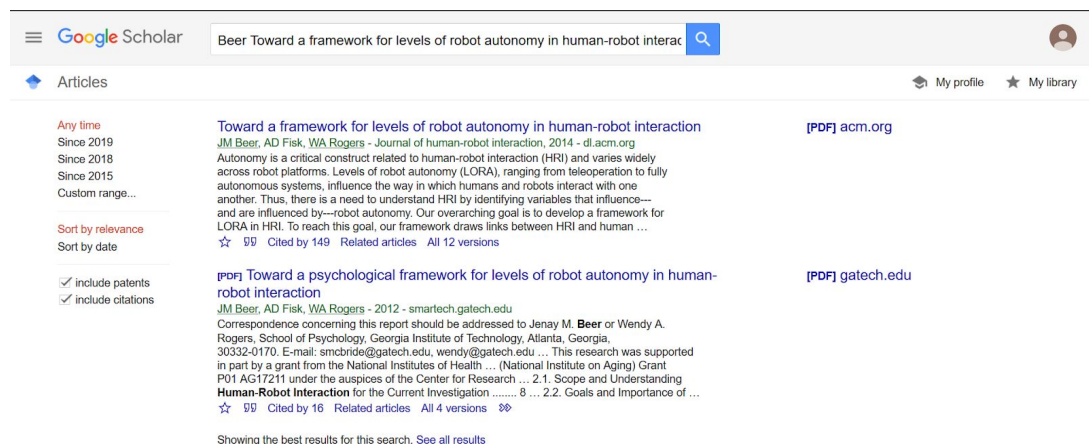
2. Alma-Primo

Clicking on the Alma-Primo button will launch an Alma-Primo search for the cited work. Alma-Primo enables you to find the sources of citations, where full-text may be available based on the subscriptions of your institution.



3. Google Scholar

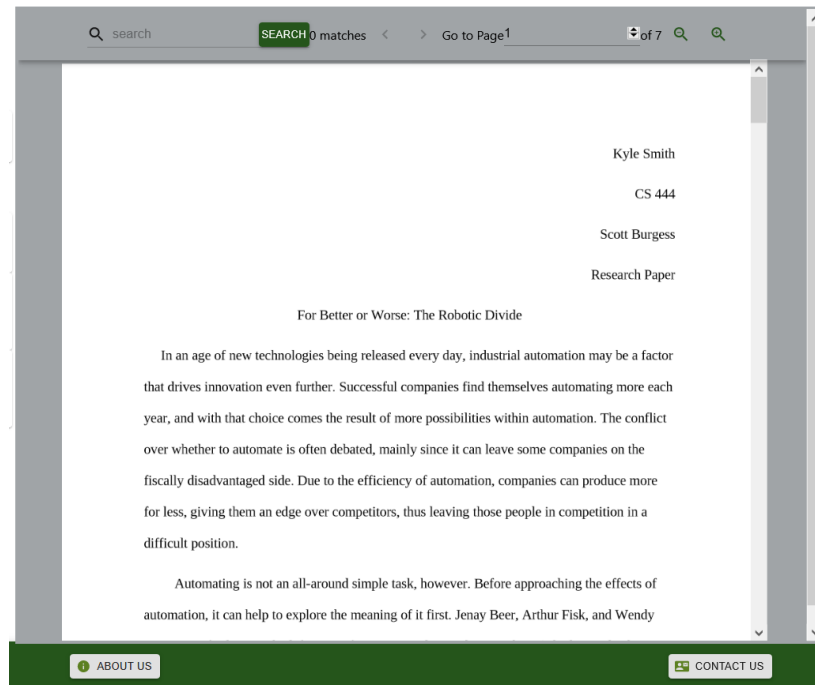
Clicking the Google Scholar button on the discovery tool will launch a search on Google Scholar for the cited work. You can check if that work has been frequently cited using the “Cited by” data found below the search description.



E. PDF Viewer

Student papers are displayed in the pdf viewer located at the center of the analyze page. Features included in the pdf viewer are a search tool, page navigation, and zooming capabilities. To search type the word or phrase you are looking for then click the search

button. After the button is clicked, you will see how many matches were found and you can navigate the matches using the forward and back arrow buttons. To navigate pages, you can scroll, type the page number in the go to page field, or use the up and down arrow keys next to the go to page field. To zoom out click on the magnifying glass with the minus sign and to zoom in click on the magnifying glass with the plus sign.



F. Evaluation using rubrics

To assess citations you will need to first select a rubric to use. The rubric selection drop down will list rubrics created by you (or added if it's a default rubric) as well as rubrics shared with you from group affiliation. Each rubric item is displayed by their title and will expand if clicked on. Once clicked on, this rubric item is also selected to be saved as an evaluation. If desired you can type feedback in the annotation box underneath the rubric values. Once you are ready to save the rubric score and annotation (if you made one) then click the save rubric value button. You will receive a notification if your assessment was saved after.

Select a Rubric

Determine the Extent ... ▾

☒ Capstone 4 ^

Effectively defines the scope of the research question or thesis. Effectively determines key concepts. Types of information (sources) selected directly relate to concepts or answer research question

☐ Milestone 3 ▾

☐ Milestone 2 ▾

☐ Benchmark 1 ▾

Annotation

Great work |

SAVE RUBRIC VALUE

VII. Overview

The overview page is where you can see a report of all the assessments done on the analyze page. Overview has two tabs, one to assess by paper and another to assess by group. To grab the assessments done for a single paper select the class or assignment (you can enter both) then select the paper you want to grab the evaluations for. Once the paper is selected, then you can click show evaluations to generate the report.

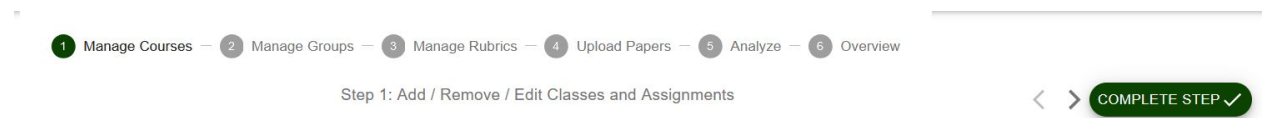
To view the results of group assessment click on the by group tab. Then select the group that you want to show the evaluations for. The results will display one table of assessments for overall student paper for various judges per paper. **For group evaluation the only thing citation used in the overview report is overall paper assessment.**

IX. Appendix

A. The Stepper

The top of each page within the Citing Insights application has 6 steps, each step being a distinct process in the Citing Insights process. The step or page that you are on will be highlighted. You can click on the step that you want to go to or use the arrow navigation.

Clicking the complete step button will mark that step complete and move you to the next step. Clicking the complete step button will not affect the functionality of the application.



B. Configuration form

When the application is first put on the server, someone will have to put basic information for the application to work. This information includes, a primary color given in HEX, a secondary color given in HEX, the institution name, an image for the login screen and information needed for the discovery tool.

In order to use OneSearch in the Citing Insights discovery tool, we require the OneSearch base URL. This url will be used to reach the OneSearch homepage for your institution. The discovery tool will also need to know your institution's view id (vid). You can find it in the URL after doing an everything search.

(Example: https://....exlibrisgroup.com/....search?vid=01CALS_HUL)

Application Configuration

User Interface Colors in HEX

Primary Color *

This color should be dark

Secondary Color *

This color should be lighter

Institution Name

Institution Name *

OneSearch Base URL - Library Discovery Tool

OneSearch Information *

Example: humboldt-primo.hosted.exlibrisgroup.com/primo-explore

OneSearch View Id - Institution Specific (can be found in Url when doing an "everything" search)

OneSearch Information *

Example: https://...exlibrisgroup.com/.../search?vid=01CAL5_HUL

Image to Display (recommended dimensions about 800x530)



Max file size: 5mb, accepted: jpeg/png

Choose Images

SUBMIT