IRMA – How to create a new Book publication record

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1. Login to IRMA

   a) Go to the usyd staff page, to the right of the screen under LOGIN, scroll down and click on IRMA

      OR

   b) Go directly to the web address: http://sydney.edu.au/irma

This will take you to the authentication screen. Use your Unikey and Password to login
2. Getting to the ‘Publications’ area

After logging in, you are on the user profile page, which shows your details. To view a publication record, click on Continue.

This will take you to the IRMA desktop. From here, click on the link for List Existing Records under P for Publications.
This will take you to the Publication production area.

From this screen you can:

- Access the **Grants** and **Reporting** function from the tabs at the top of the screen.
- View existing publication records by using the **Search** or **filter** function
- Create new publications records by using the **Create** function
- And you can logout of IRMA by clicking on the **Logout** button at the top left of the screen
3. Filter Records

Filtering records is one way for you to see what is already on IRMA. It is particularly useful if you want a general overview of your department's records already in IRMA.

You can filter by:

- Faculty, school or department
- Publication output type and category
- Year
- The publications you have created (using the function Filter records by author and selecting from the dropdown menu)
- Own publications (using the Filter records by author function)
- Status

E.g., using the filters underlined in red below, one can search for all 2010 records from the Australian Centre for Field Robotics in the Faculty of Engineering.
You can now see a summary of this department's publications in IRMA.

From this view you can see the records:

- **Status**
- **Last edit by**
- **Year**
- **First-named author**
- **Title**
- **Category**: the HERDC categories are C1 – refereed Journal article, E1 –conference proceedings, A1 -book and B1 -book chapter
- **Green records**: – These have already been processed and accepted for the HERDC collection. You will not be able to change these, so please contact [xx] if you have any concerns regarding these.
4. Search for Records

If you want to find a record by a specific author or with a certain title, you can use IRMA’s search function.

a) Search for a specific author

To search for a particular internal author in all publications, click on the Search tab at the top of the screen.

Enter either the surname or staff ID in the field called Internal Author and then click Search.

If there is more than one staff member with this surname, choose the one you want by clicking Add next to the relevant academic.

This will produce a list of all publications by that author in alphabetical order. The publications can be listed in year order if you click on the word Year in that column.
If the publication is not on the system, start to create a new record, by clicking on Create at the top of the screen (see below).

b) Search for a specific title
To search for a particular title in all publications, click on the Search tab at the top of the screen. Enter either the title or a portion of the title into the field called Title Search and then click Search.

It is important to note that, when searching via title, IRMA is sensitive to things such as commas, apostrophes and symbols.

E.g., Searching for “An efficient path planning and control algorithm” will not pick up the record if it is entered in IRMA as “An efficient path planning & control algorithm”.

For this reason, it is recommended that you search for a portion of the title that contains minimal syntax. E.g., “An efficient path planning”
5. Creating a new Publication record for a Book

Step 1: Generating a publication record template

Click on the Create button at the top of the screen.

Choose the Publication Output: Book

Choose the Publication Category: A1 - Book
Then enter the **Publication title**: Book title. Then click **Next**

### Duplication check

IRMA will now automatically check to see if a record matching this title is already on the system.

If the title is not on the system, proceed by clicking **Next**

This will take you directly into the publication record

<table>
<thead>
<tr>
<th>First-name</th>
<th>Category</th>
<th>Year</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If the title is already on the system it will show up at the bottom of the screen.

If the title is already on the system for the current year, do not proceed, click **Back** to stop.
Step 2: Header tab – Citation information

Once in the record, the first screen you enter into is the **Header** tab, this is where the citation information is found.

a) **Entering publication information**

Enter the:

- Total number of USyd authors
- Total number of External authors
- Add Book name by creating a book profile
- Total number of pages in the book

Once added click on **Save**

b) **Adding a Book**

Click on the **Add** button to the left of **Book name**

This will take you to a Book Search screen
• Type in the title of the book and click **Search**.

This will list any book on the system with this title. It is possible to already be on the system if one of the other chapters has already been created. In this case the book is not on the system yet.

• To create a record for a New Book, click on **Create**.

This will open up to the **New-Book** screen, please enter the information into the relevant fields.

- ISBN – use a 13 digit ISBN if more than one on the publication
- Book title – should already be populated
- Editor
- Publisher – click on Add (see below)
- Place of publication
- Number of volumes – how many volumes in the book
- Total number of chapters in the book

**c) Add a Publisher**
Click on **Add** to add the publisher. This will take you to the **Publisher Search** screen.

Enter the name of the Publisher or part of the name in the field provided and click **Search**.

This will give you a list of all publishers on the system with Portland in the name. To choose one, click on **Link** to the right of the correct Publisher name. This will take you back to the **New – Book** screen with the Publisher field populated.

Click **Save**.
d) Create a New Publisher

If you do a search and the Publisher you were looking for is not found, you can create a new Publisher by clicking on **Create** in the **Publisher search results** screen.

This will open up to the **New-Publisher** screen.

- You just need to enter the name of the Publisher in the field provided and click **Save**. (Please do not enter an address or location for the publisher. That information is captured in the **Place of publication** field in the **New -Book** screen.)

- Then follow as above, click **Save** in the **New - Book** screen. This will take you back to the Header tab.
Back in the Header tab, you can see the Book name in that field as well as the ISBN.

Once the book is created you can also see the **Book details** at the bottom of the screen - ISBN, Editor, Edition, Publisher, Commercial publisher status, Place of publication, Number of volumes and Total number of chapters in the book.

- Once all the information is entered, click on **Save** at the top of the screen.
Step 3: Authors tab
Once the Header tab is complete and you have clicked save, you will automatically be sent to the Authors tab.

Add the authors in the order they appear in the publication.

a) Add internal author
To add an internal author, click on Add under Internal Authors

Enter the author’s Surname or Staff ID in the space provided. You can choose from the Search Options dropdown list how you want to search the internal author database.

Search Options – Can focus the results of your search. Use Begins with for a last name like Smith. You will only get a list of names starting with Smith rather than a list of all last names that contain Smith in the name.

Then click Search
To choose an author, click on the Add button to the right of the correct author. 

You will then be asked to confirm whether you want to add the author department. Click Yes.

You will then be shown a screen as seen below. Click Save.

This will attach the internal author to the Authors tab. You should now see the author displayed in the Authors tab.
b) Add external author
To add an external author, click on the **Add** button under **External Authors**

In the **External Search** screen, enter the external author surname in the field provided. Choose a **Search Option** from the dropdown menu and then click **Search**

A list of all authors fitting your search criteria will now appear. Click on the **Add** button next to the correct author.
Then click **Save**.

This will take you back to the Authors tab with the external author added.

c) **Changing author order**

If need be, you can change author order after the authors have been entered by clicking on the second symbol in the Action column next to each author.

This will open up the **Move/Change Author order** screen.

Choose the number for the order the author falls on the publication and click **Save**.
Once all the authors are attached and in publication author order, click **Save**. This will take you to the Documents tab.
d) Creating new internal or external authors

New Internal author

If you search for an internal author and they are not already in IRMA, you can create them. To do this, click on Create in the Author search results screen.

This will take you to the New – Investigator screen:

The red circled fields will need to be filled in
Compulsory fields that need to be filled out:

**Last name**  
**Initials** (for citation purposes – first & middle name initials)  
**First name**  
**Title**  
**Gender**  
**Faculty/School/Centre**  
**Department**  
**Staff number** – please use the actual staff/student number if you have it. If you do not have either you can click on the dropdown menu and choose the option **Staff number (system assigned)**

**Start date**  
**Status** - choose Postgraduate student, Research staff, etc.

When these fields are filled in, click **Save** at the top of the screen

The next screen will ask you to confirm the department. Click **Yes**

Click **Save** on the next screen, which asks you to confirm the affiliation split.

This will take you back to the Authors Tab
New external author

Similarly, if you search for an external author and find they are not in IRMA, you can create them. To do this, click on Create in the External search results screen.

Enter the details below.

Fields that need to be filled out:

**Last name**
**First name**
**Initials**
**Institution** – enter the University in this field
**Country**
**Email** – at the minimum you need to enter @ symbol
**Collaboration type** – choose the most appropriate option from the dropdown menu (see below)
**Step 4: Documents tab**

The documents tab is where you can attach and view the verification materials attached to the record.

**To add a document**

Click on the Add button.

You will then see the **Type of Document** screen. Click on Add

In the **New Document** screen, you need to:

1. Enter a Document description: for example 'front-matter' or 'introduction chapter'
2. Attach document
3. Indicate **Type of Document**
To attach a document click **Browse**. This will take you to a **Choose file** screen. Locate the appropriate document that you have already saved and click on it. Then click on **Open**. This will attach the document.

![Choose file screenshot](image)

Now select the **Type of document** from the dropdown menu.

![New Document screenshot](image)

Use the category **1. Output** for the main research document – for a book it is the full front-matter and Introduction chapters

Use the category **2. Verification Material** for all other documentation – proof of affiliation or proof of commercial publisher status
One you have filled in those three fields, click on **Add**.

Then click on **OK**

Once you have attached all documents, click **Save** at the top of the Documents tab. This will take you to the Notes tab.
Step 5: Notes tab

The notes tab is how faculty administrators and the Research Portfolio staff communicate with each other.

Typically, notes relate to missing verification material

- Need for the published version of the documentation (pre published not acceptable)
- Author affiliation
- Chasing missing documentation
- Information or documents requested

To add a note, click on Add

Enter the comment or note and click Save
When you have added all notes, click **Save** at the top of the Notes tab, this will take you to the Coding tab where the Research codes are added.
Step 6: Coding tab

The coding tab is for the relevant research codes entered for a particular publication. We are currently collecting The Australian and New Zealand Research Classifications - FOR (Field of Research) and SEO (Socio-Economic Objective) codes.

The method used for entering FOR and SEO codes is almost identical.

There are three ways to enter a code:

1. Enter the number directly
2. By search functionality
3. By Browse functionality

### a) Enter directly
If you know the FOR or SEO code, you can enter it directly into the field on the left hand side, in the fields **For Codes** and **SEO codes**.

### b) Search functionality
If you do not know the code, you can enter a keyword into the **Search by Code or Description** field and click **Search** next to it.
This will give you a list with all Codes with that word in it e.g., searching for ‘religion’ gives you the results below:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>120111</td>
<td>Religion Curriculum and Pedagogy</td>
</tr>
<tr>
<td>170114</td>
<td>Psychology of Religion</td>
</tr>
<tr>
<td>208115</td>
<td>Philosophy of Religion</td>
</tr>
<tr>
<td>226211</td>
<td>Religion and Society</td>
</tr>
<tr>
<td>226229</td>
<td>Religion and Religious Studies not elsewhere classified</td>
</tr>
</tbody>
</table>

Click on the number of the most appropriate code and it will attach to the record:

c) Browse functionality

Another alternative if you do not know the codes is to use the Browse function. This is useful if you want to use the relevant department as your starting point.

Click on Browse

This will take you to the list of Research Divisions. Click on the most relevant option.
You can open up these fields to get to the 4 digit and 6 digit codes by clicking on the Plus symbol:

This will then take you to a list of more specific subject areas within the selected Research Division. Click on the most relevant.

d) Changing percentages
You can add up to three FOR and three SEO codes per record. Once these codes are entered, you will need to update the percentages. The percentage refers to how much of the research involved for this particular record corresponds to each codes.

Click Save at the top of the Coding tab when you are done.

For more information about FOR and SEO codes, see: http://www.abs.gov.au/AUSSTATS/abs@.nsf/Latestproducts/E067437BEE4CD9EBCA2574180004423D?opendocument
Step 7: Finishing a new record

Finishing and submitting the record is a two-step process.

If you feel you have supplied all required information and documentation, go to the Documents tab.

a) Documents tab

To indicate that the record is ready to be checked, tick on the box next to:

New records only. When this record is ready to be checked for HERDC eligibility – tick this box

This will change the status of a New record to Verification required. The team in the Research Portfolio will then check the information and documentation for inclusion in the current HERDC collection.

b) Finish the new record by Submitting

The last thing you need to do to a New record whether you feel it is ready for checking or not is to go to the Header tab and click on Submit.