IRMA – How to create a new journal 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.

**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 Journal article

Step 1: Generating a publication record template

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

Choose the Publication Output: Journal

Choose the Publication Category: C1 – Refereed Journal article
Then enter the **Publication title**: journal article 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

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, which is where the citation information is.

a) Entering publication information

Enter the:

- Title
- Total number of USyd authors
- Total number of External authors
- Journal name (see below - info about adding a journal & creating a new journal)
- Journal volume
- Journal issue
- Start page
- End page

Once added click on **Save**

There are a few additional fields at the bottom of this screen that are ERA related (Scopus Id, Scopus citation, Thompson ID). You do not have to supply this information; it will be sourced by the Research Portfolio team.
b) Adding a Journal

Click on the Add button to the left of Journal Name.

Type in the journal name or keyword and click Search. The next screen will give you a list of all journals with that title or with that word in the title on the system.

To choose the journal, click on the Link button to the right of the title. This will attach the journal and all its information to the Header tab in the publication record.

Back in the Header tab, you can see the journal name in that field and at the bottom of the screen, the Journal detail is also visible (ISSN, peer review status, confirmation of peer review, place of publication, publisher).
c) Create a New journal

If you do a search and the journal is not on the system, you can create new journal:

Search for Journal titled: **Anthropology of Cave Men**

You will get a list of all journals on the system with **anthropology** in the title:

If the journal is not there, you can create a new journal by clicking on **Create**

The basic information needed to create a new Journal profile:

- Journal name
- ISSN
- Place of Publication
- Publisher
If you do not have the ISSN, publisher and place of publication information, Ulrich's and Thompson is a good source to use:

Ulrich: http://www.ulrichsweb.com/ulrichsweb/

Thompson/ISI: http://science.thomsonreuters.com/mjl/

Once the author numbers, journal, volume, issue and page numbers are entered, click on **Save**. This will take you to the next tab.
Step 3: Authors tab
Once the Header tab is complete and you have clicked save, you will automatically be sent to the Authors tab.

a) Add internal author
Add the authors in the order they appear in the publication.

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 contained in the last 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.

Once all the authors are attached, click on Save. This will take you to the Documents tab.
c) 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**
- **First name**
- **Title**
- **Gender**
- **Faculty/School/Centre**
- **Department**

**Staff number** – please use the actual staff/student number. If you have neither 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 article/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 ‘article’, ‘front-matter’ or ‘proof of peer review’
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. Click on **Open**

![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 - an article

Use the category **2. Verification Material** for all other documentation – proof of peer review, proof of affiliation
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 – such as proof of peer review
- Need published version of article
- 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>120211</td>
<td>Religion Curriculum and Pedagogy</td>
</tr>
<tr>
<td>170414</td>
<td>Psychology of Religion</td>
</tr>
<tr>
<td>120515</td>
<td>Philosophy of Religion</td>
</tr>
<tr>
<td>220990</td>
<td>Religion and Society</td>
</tr>
<tr>
<td>220999</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.