Publications Web Interface (PWI) Data Entry Guide

2006
TABLE OF CONTENTS

1. BACKGROUND ................................................................................................................................. 2
   1.1 WHAT IS THE PWI AND WHERE DOES IT FIT IN? ................................................................. 2
   1.2 WHO IS IT FOR? ...................................................................................................................... 2
   1.3 WHAT CAN IT DO? ................................................................................................................... 2
   1.4 WHAT CAN’T IT DO? ................................................................................................................. 2

2. USING THE PWI ................................................................................................................................. 2
   2.1 PWI USER ACCOUNTS ........................................................................................................... 2
   2.2 LOGIN ...................................................................................................................................... 2
   2.3 THE MAIN PAGE ..................................................................................................................... 3

3. SEARCHING FOR PUBLICATION RECORDS .................................................................................. 4
   3.1 BASIC SEARCH OPTIONS ........................................................................................................ 4
   3.2 ADVANCED SEARCH OPTIONS ............................................................................................... 5

4. CREATING PUBLICATION RECORDS ......................................................................................... 6
   4.1 STYLE GUIDE AND BUSINESS RULES FOR DATA ENTRY .................................................. 6
      4.1.1 Business Rules .................................................................................................................. 6
      4.1.2 Style Guide ...................................................................................................................... 6
   4.2 CORE DATA ENTRY FOR ALL PUBLICATION RECORDS .................................................. 7
      4.2.1 First Step for ALL Publication Records ........................................................................ 7
      4.2.2 Outline of Core Data ........................................................................................................ 7
      4.2.3 Adding Authors ............................................................................................................... 7
      4.2.4 Adding AOUs .................................................................................................................. 8
      4.2.5 Adding RFCD Classification ......................................................................................... 10
      4.2.6 Finalising Data Entry ..................................................................................................... 11
   4.3 PUBLICATION RECORD EXAMPLES ................................................................................... 11
      A1 Book Example .................................................................................................................... 12
      B Book Chapter Example ....................................................................................................... 13
      C1 Journal Article Example .................................................................................................. 14
      E1 Conference Publication Example .................................................................................... 15

5. AMENDING PUBLICATION RECORDS ......................................................................................... 16
   5.1 INCORRECT YEAR ................................................................................................................... 16
   5.2 INCORRECT CATEGORY .......................................................................................................... 16
   5.3 INCORRECT CHAPTER ATTACHED TO WRONG BOOK? ................................................... 16
   5.4 INCORRECT AUTHOR, CLASSIFICATION OR AOU ......................................................... 16

6. CHANGING THE LAYOUT/DISPLAY OF RECORDS ................................................................... 16
   6.1 MOST RECENTLY USED ......................................................................................................... 16
   6.2 AUTHOR SURNAME ORDER ................................................................................................. 16
   6.3 CATEGORY ORDER WITH TOTALS ....................................................................................... 16
   6.4 VERIFICATION ORDER ......................................................................................................... 16
   6.5 MISSING INFORMATION REPORT ......................................................................................... 16
   6.6 AUTHOR RANKING REPORT ................................................................................................. 16

7. PRINTING AND REPORTING .......................................................................................................... 17
   7.1 PRINTING ............................................................................................................................... 17
   7.2 KEEPING TRACK OF YOUR DATA ....................................................................................... 17
      7.2.1 Showing all work for a particular department ............................................................... 17
      7.2.2 Showing all work for a particular government return ................................................... 17
      7.2.3 Identifying missing information ..................................................................................... 17

8. VERIFICATION AND SIGN-OFF ................................................................................................. 18
   8.1 VERIFICATION ....................................................................................................................... 18
   8.2 FINAL SIGN OFF ..................................................................................................................... 18
1. Background

1.1 What is the PWI and where does it fit in?
The Publications Web Interface or PWI allows access to publications data stored in ResearchMaster Enterprise. New publications records can be entered and existing publications records viewed and modified if incomplete.

1.2 Who is it for?
The PWI is designed as a tool to assist in the collection of publications information. Users include staff in the Research Support Unit, Portfolio/School Editors and Portfolio/School Assistant Editors.

1.3 What can it do?
The PWI permits the entry of publications data up to an including verification and final signoff and provides basic reporting to assist with the collections process.

1.4 What can’t it do?
The PWI does not produce the final submission report to DEST and does not produce reports for analysis of data. These sorts of activities are undertaken by the Research Support Unit.
2. Using the PWI

2.1 PWI User Accounts
User accounts are set up by the ResearchMaster Administrator in ITS. If you have a ResearchMaster client and account set up on your PC but do not have access to the Publications Module you will not automatically have access to the PWI. If you have read-only access to the Publications Module in ResearchMaster, you will have read-only access on the PWI. If you require a new account, please contact Melinda Hatton-Price via email to melinda.hatton@rmit.edu.au.

2.2 Login
Follow the link found at the Research Publications Collection website http://www.rmit.edu.au/rd/herdc/pubs select the link to the PWI.

The first screen you will see is the login page.

![Login Screen](image)

Enter you E-number as your Username and your Password as allocated by ITS and then select the Login button as per example below. (Note that your PWI password is the same as your ResearchMaster password)

![Login Example](image)

After successful login, you should see a screen similar to the next screen shot.
2.3 The Main Page

Note that on this example page there are three sections.

Create a New Publication Section (1)
The Create a New Publication section is on the left side of the screen marked (1). When ready to create publication records, the data entry operator selects the appropriate category of publication they wish to enter. This will open up a new screen where data can be entered and a reference number will be listed.

Further instruction on how to create new publications records can be found in the following sections of this Guide.

Find View and Edit Publications Section (2)
The Find View and Edit Publications section can be found at the top part of the screen marked (2). By default, four basic search options are provided. An additional six options are available as advanced search options.

Further instruction on how to search for publication records can be found in the following sections of this Guide.

Found Publications Section (3)
The Found Publications section is located in the middle of screen and is marked (3). This is where the results of your search will be shown. Please note that the PWI remembers the last search that you did from the main page. This information is retrieved again whenever you return to the main page or log out and log back into the system.
3. Searching for Publication Records

The first step before entering in data is to ensure that the publication record doesn’t already exist – this is particularly relevant for publications that have more than one author from different Schools. The search option is also used to retrieve existing data that needs to be modified or completed.

By default, four basic search options are provided. An additional six options are available as advanced search options.

### FIND VIEW AND EDIT PUBLICATIONS

- **Show records I have created only**: If this box is ticked, only publications that you yourself have created will be shown. If this box is not ticked, all publications that you have access to will be shown. The same user access rights that apply in other ResearchMaster systems are in force.
  - You would normally leave this box ticked when entering data.
  - If you are verifying data entered by other people you would un-tick this box

- **Government Collection Only**: If this box is ticked, only publications that belong to categories that have been marked ‘for government collection’ will be displayed.
  - The government categories for this collection are:
    - A1 Book
    - B Book Chapter
    - C1 Journal Articles
    - E1 Conference Publications
  - Do not enter in other publications outside of these categories.

- **Data entry complete/incomplete/either**: Choose **data entry complete** to only show to only show publications for which all essential information has been entered.
  - Choose **data entry incomplete** to show publications for which some required data has not been entered.
  - Choose **data entry either** to show all records, regardless of level of data completeness.

*Data entry complete* is defined as publications where data is in all the fields that have been marked ‘essential’ within the publication category definition. Which fields are ‘essential’ and which are not are set up in ResearchMaster.

**HINT:** Use the missing information report view to see details of missing data.

### Basic Search Options

- **Year Published**: Enter the year that the item was published (in this case it should always be 2006 otherwise it is not eligible to be included in the collection).

- **Publication Reference Number**: Searches for the publication reference number ie ‘2006012345’
3.2 Advanced Search Options

To view the advanced search options, tick the box labelled “More Search Criteria” as shown below.

- All advanced search options allow you to use ‘wildcards’ in your search. Use an asterix * at the start and end of a search item to match any word or words in that item.
- Searches are not case sensitive. For example a search for ‘book’ will return ‘BOOK’, ‘Book’ and ‘book’.

Publication Category Name
This allows you to search for publications in a particular category. For example:
- To search for all items in category ‘Journal Article’, enter the search criteria ‘journal article’; or
- Use wildcards to as shown below.

This will return every category with ‘journal’ in the name and is a safe method of finding all relevant records.

Author Surname
This searches for an author based on their surname:
- If you know the exact surname, enter it into the text box.
- If you know part of the surname, enter it including wildcards.

**HINT:** Try to get into the habit of using wildcards for all searches as this ensure that a broader search is conducted just in case there are variations in name spelling or abbreviations.

For example:
- ‘Smith’ will return all publications with authors of surname ‘Smith’.
- *Smith* will return publications with authors ‘Smith’, ‘Smithson’, ‘Smith-Jones’ etc.

Author Code
This searches for publications based on their authors’ code in the ResearchMaster system (the EPERSON code). The EPERSON code in ResearchMaster should be the person’s staff or student ID.

AOU Name
This searches for publications where they are associated with a particular AOU (school). ‘Associated means’:
- the publication itself has been allocated to that AOU; or
- an author on the publication has been allocated to that AOU for that publication.

Publication Title
Searches the publication title.
- In the case of book chapters it searches the chapter title and not the title of the parent book.
- In the case of journal and conference publication articles it searches the article title not the journal/conference publication name.
4. Creating Publication Records

4.1 Style Guide and Business Rules for Data Entry

4.1.1 Business Rules

- Do not delete/modify records that have been created by another user. If you find that a record created by someone else requires modifying you must either send the corrections to the creator or R&I.
- Do not enter ‘Non DEST’ publications
- Do not allow other staff to log-in as you to enter data
- Do not enter publications that don’t have the completed signed coversheets
- Do not enter Journal Articles until Jan 2007 - RSU will import publication records from the Web of Science which is a product of ISI Web of Knowledge and will help to reduce the amount of data entry required.

4.1.2 Style Guide

SET Portfolio have a data entry style guide that has been used in past publication rounds. These style guides have been included in this section and in each category section and aim to arrange and present the information in a clear, consistent and uniform way that also makes for clearer reporting.

There are core data fields that are required to be completed for each publication type. These fields have been set up by the ResearchMaster Administrator. For each category there is a minimum amount of information that must be entered before you can save the publication.

- Use capital for the first letter of the first word and lower case for the rest (except for Names, Proper Nouns, etc). For example:
  ‘The inherent errors of mapping Australia Post postcodes to ABS derived postal areas’.

- If the title includes maths or chemical symbols with ‘inferior’ or ‘superior’ symbols, place these symbols ‘on line’ instead. For example:
  ‘H₂O; can be written as ‘H₂O’.
  Similarly, ‘¹³C’ can be written as ‘carbon-13’.

- Symbols that are unavailable in ResearchMaster can be often spelt out instead. For example:
  ‘α-linolenic acid’ can be written as ‘alpha-linolenic acid’.

- If there is a subheading to the title, separate it from the main title with a colon or dash and capitalise the first letter. For example:
  ‘Chinese herbal medicine for lung cancer: A critical literature review’.

- Keep the name of the Publisher concise. It is not necessary to give the full business name, especially if the Publisher is well known. For example:
  ‘John Wiley’ instead of ‘John Wiley and Sons Pty Ltd’

- Keep the place published as the city rather than the country as preferred option. If the city is well known ie London, New York, Sydney etc it is not necessary to give the country. If the city is not widely known, give the state or country as well. For example:
  ‘Daylesford, Vic’ OR ‘Los Alamitos, California’ OR ‘Abingdon, UK’.

**HINT:** Keep an eye out for further style suggestions for specific categories in the following sections.
4.2 Core Data Entry for ALL Publication Records

4.2.1 First Step for ALL Publication Records

The first step in creating a publication record is searching the database to ensure that there is not already an existing record. Follow the search steps referred to in section 3 to search for any existing publication records. If you do find an existing publication record that matches your publication, record the Reference Number on the top right hand corner of the Coversheet. This saves duplicating records in ResearchMaster that will later need to be removed from the database.

Next you need to identify the year it was published. From the Main Page of the PWI, select the relevant year from the list of years displayed on the left hand side of your screen.

You will note that you can only create publication records for the current collection year which is for publications published in 2006 (as highlighted in yellow on right).

The ResearchMaster Administrator has established a list of categories for DEST reportable publications.

You will then need to ensure that all the required information has been provided by the author on the publications coversheet.

HINT: If you have chosen to create a Book Chapter you will be taken to a list of books before the main data entry screen. These are books which have already been recorded as having chapters contributed by authors from your University in the year you have selected. If the book you require is listed here you should select it, otherwise follow the instructions to enter a new book.

4.2.2 Outline of Core Data

There are a series of core data fields that are required to be completed for all publication categories. The following are instructions on how to enter data in those core fields.

Once you have entered the data in the data entry first page (refer to relevant section on data entry for specific categories) and after successfully saving data, the screen will refresh and reload the data you have just entered.

You will note that the scroll bar now allows you to scroll down. Scroll down until you see the additional fields that have become active. The lower part of the screen, after scrolling down, should look something like the screen shot on the right.

4.2.3 Adding Authors

Click ‘Add’ directly underneath the heading ‘Authors’.
Authors

Your task is now to check whether the author you are adding is already in the system. To do this, enter their person code if known, or their surname, and click 'search'.

- You may put staff id number, student id number or ResearchMaster person code into the person code box
- You may enter the first few letters of the surname if the whole name is not known

**SEARCH FOR AUTHOR**

<table>
<thead>
<tr>
<th>Person Code</th>
<th>Given Name starts with</th>
<th>Middle Name starts with</th>
<th>Surname starts with</th>
<th>Gender</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Mathews</td>
<td>Male</td>
</tr>
</tbody>
</table>

A list of people who match your search criterion will be shown as per the example above.

**HINT:** If the person you want is not in this list, you should complete the Personnel Creation and Change Form found at www.rmit.edu.au/herdcre process and forward to Melinda Hatton-Price via email melinda.hatton@rmit.edu.au or fax to 9466 9980. Most internal staff should already exist within the system.

To select a person from the search results, click the yellow arrow box next to their name.

Follow the above steps for each author you need to add.

**HINT: Author Quick Add**

If you know the person code for the author you need to add to your record, you can perform a 'Quick Add' by entering the person code in the field provided and then click on 'Quick Add'.

If the code is correct, the author details will then be displayed on the record.

### 4.2.4 Adding AOUs

AOUs in ResearchMaster refer to School codes. ResearchMaster allows you to allocate AOUs to a publication at two levels:

- You can allocate AOUs to the publication overall. This may indicate which AOU will be given credit for the publication (for example, to use in distributing funds received).
- You can allocate AOUs to each author on each publication. This indicates which AOU or AOUs each author was working in at the time they were writing the publication.

These two sets of AOUs will normally match. See the diagram below for an example.
This could illustrate the following scenario:

- The first listed author on this publication was A/Prof Qantas. While writing this publication she spent 4 days a week in Biological Sciences and 1 day a week in Physical Sciences. (80:20 split, with Biological Sciences marked as primary)
- The second listed author was Dr Warsaw and he spent his entire time in Management.
- The third listed author was Dr Hobart, who was not on the staff of the University.
- The fourth listed author was A/Prof Wellington who spent his entire time in History.
- This example University has a special rule that any work carried out in Management is also to be allocated to Accounting. (hence Accounting is added to this publication even though none of its authors were in Accounting).
- It has a rule that any publication is to be allocated equally between all the departments of each of its authors (hence 20:20:20:20:20 split).
- It also has a rule that the primary AOU for any publication is to be made the primary AOU of the first listed author (hence Biological Sciences is marked as the primary AOU).
- ResearchMaster enforces two business rules for AOU allocation as follows:
  a) For each author, and for the publication overall, the total allocation of AOU must be 0% or 100%.
  b) Each author, and the publication as a whole, must have one AOU marked as 'primary'.
- When you add an author to a publication, the author’s AOU is brought in as well. You can choose to remove these if you wish.
- The Publications Web Interface makes no assumptions on how the authors’ AOU is to be allocated to the publication overall. You will have to make this allocation yourself.
- External authors are not given AOU.
- Each author and the publication overall is also allocated a 'primary AOU'. This is required for some reports.
- If you wish to add another AOU to the publication that is not any one of the authors' AOU, you can do this. Click on 'add another' and select the AOU from the list provided.

**HINT: AOU Quick Add**
If you know the AOU (or school code) you can perform a 'Quick Add' by entering the code in the field provided and then click on 'Quick Add'. For a list of school codes available please refer to the School Name and Codes table at the back of this Guide.

*If the code is correct, the AOU details will then be displayed on the record.*

**HINT: Auto Split**
It is important to allocate the credit for each publication to appropriate schools.

*When you have finished entering all author and AOU details click ‘Auto Split’. This will automatically split the points for that publication.*

4.2.5 Adding RFCD Classification

Research Fields, Courses and Disciplines or RFCD are codes that the RMIT are required to collect on research activity to report to DEST. This will be especially important in the Research Quality Framework (RQF).

Click on the 'Add' button directly below the heading ‘RFCD Classification’

<table>
<thead>
<tr>
<th>Code</th>
<th>Desc</th>
</tr>
</thead>
<tbody>
<tr>
<td>230000</td>
<td>MATHEMATICS</td>
</tr>
<tr>
<td>240000</td>
<td>ASTRONOMICAL SCIENCES</td>
</tr>
<tr>
<td>250000</td>
<td>PHYSICAL CHEMISTRY (incl. Structural)</td>
</tr>
<tr>
<td>260000</td>
<td>GEOLOGY</td>
</tr>
<tr>
<td>270000</td>
<td>BIOCHEMISTRY &amp; CELL BIOLOGY</td>
</tr>
<tr>
<td>280000</td>
<td>INFORMATION SYSTEMS</td>
</tr>
<tr>
<td>290000</td>
<td>INDUSTRIAL BIOTECHNOLOGY &amp; FOOD SCIENCES</td>
</tr>
<tr>
<td>300000</td>
<td>SOIL &amp; WATER SCIENCES</td>
</tr>
<tr>
<td>310000</td>
<td>ARCHITECTURE &amp; URBAN ENVIRONMENT</td>
</tr>
<tr>
<td>320000</td>
<td>MEDICINE : GENERAL</td>
</tr>
<tr>
<td>330000</td>
<td>EDUCATION STUDIES</td>
</tr>
<tr>
<td>340000</td>
<td>ECONOMIC THEORY</td>
</tr>
<tr>
<td>350000</td>
<td>ACCOUNTING, AUDITING &amp; ACCOUNTABILITY</td>
</tr>
<tr>
<td>360000</td>
<td>POLITICAL SCIENCE</td>
</tr>
<tr>
<td>370000</td>
<td>SOCIOLOGY</td>
</tr>
<tr>
<td>380000</td>
<td>PSYCHOLOGY</td>
</tr>
<tr>
<td>390000</td>
<td>LAW</td>
</tr>
<tr>
<td>400000</td>
<td>JOURNALISM, COMMUNICATION &amp; MEDIA</td>
</tr>
<tr>
<td>410000</td>
<td>PERFORMING ARTS</td>
</tr>
<tr>
<td>420000</td>
<td>LANGUAGE STUDIES</td>
</tr>
<tr>
<td>430000</td>
<td>HISTORICAL STUDIES</td>
</tr>
<tr>
<td>440000</td>
<td>PHILOSOPHY</td>
</tr>
</tbody>
</table>

The next screen will be displayed as diagram on left:

Select the hyperlink text of the broad research area. Keep selecting the text hyperlinks until you find the relevant RFCD code.
HINT: You should have on your completed Coversheets the actual codes as allocated by the author who completed the form. You can perform a ‘Quick Add’ for RFCD codes by entering the code in the field provided and clicking ‘Quick Add’. This is the same sort of process as for Author and AOU quick add functions.

If the code is correct, the RFCD details will then be displayed on the record.

4.2.6 Finalising Data Entry
When you have entered all of the data required, tick the ‘Data Entry Complete’ box.

HINT: You cannot mark a publication record as Data Entry Complete if all the essential information, including authors and AOUs, has not been entered.

Click ‘Save’ at the bottom right hand corner of screen.

HINT: The PWI saves your data when you the following:
- When you click on an ‘Add’ link
- When you click the ‘Save’ button
- When you click the ‘Save & Out’ button
The PWI does NOT save your data when you do the following:
- When you change pages using the orange menu bar at the top of the page
- When you remove a related item by clicking on the icon.

4.3 Publication Record Examples
The first main data entry page for each category is basically the same. Different categories may have additional information required for example, E1 Conference Publications requires the name of the conference be entered but this would obviously not be relevant for a C1 Journal Article.

The following are examples of complete publication records in the previous round. This is meant to act as a guide to the fields you are required to enter. The Coversheets were design to keep in line the PWI data fields so it should be clear what information needs to be entered in each of the fields.

Please note that the examples are summary reports from the PWI – they don’t include all of the core data fields that were explained earlier.

Please note that the following fields do not need to be completed for this collection:
- FOR (Field of Research) Classification
- Date of Activity for A1 Books.
**A1 Book Example**

**PWI - Publication Entry**

---

**Publications Entry**

**Reference Number:** 2004001796  
**Category:** A1 - Book - Authored Research 2004 in 2005

---

**Main Publication Details**

This publication has been signed off and may not be edited further.

- **Book Title:** Topography  
- **Publisher:** RMIT Press  
- **Place Published:** Melbourne, Australia  
- **Date of Activity:**  
- **ISBN Number:** 0864592485  
- **School check:** ✔  
- **Portfolio check:**  
- **Description:**  
- **Keywords:** Design Studio teaching practice

---

**Authors**

<table>
<thead>
<tr>
<th>Order</th>
<th>Code</th>
<th>Name</th>
<th>By-line</th>
<th>Int/Ext</th>
<th>Primary</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>9501263K</td>
<td>Mr Richard Harvey Black Richard Black</td>
<td>Student</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>09093</td>
<td>Mr Martyn Richard Hook Martyn Hook</td>
<td>Internal</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**Schools**
B Book Chapter Example

PWI - Publication Entry

Publications Entry

Reference Number: 2004000722
Category: B - Book Chapters 2004 in 2005

Main Publication Details

This publication has been signed off and may not be edited further.

Chapter Title: Visuospatial, kinesthetic, visuomotor integration and visuoconstructional disorders. Implications for motor development
Book Title: Developmental Motor Disorders A Neuropsychological Perspective
Publisher: The Guilford Press
Place Published: New York
Start Page Numbers: 291
End Page Numbers: 312
Total pages: 22
ISBN Number: 1-59385-064-6
Total Chapters: 21
School check: ✔
Portfolio check: ✔
Description Keywords: Motor skill development, developmental coordination disorder, kinaesthetic, motor imagery

Authors
C1 Journal Article Example

PWI - Publication Entry

C1 Journal Article Example

Reference Number 2004000098
Category C1 - Journal Articles 2004 in 2005

Main Publication Details

This publication has been signed off and may not be edited further.

Title of Article Crystallisation and melting of isotactic polypropylene in response to temperature modulation
Journal Name Journal of Thermal Analysis and Calorimetry
Publisher Kluwer Academic
Place Published Budapest
Volume 75
Number
Start Page Numbers 233
End Page Numbers 248
Total pages 16
Journal ISSN 1388-6150
School check ✔
Portfolio check ✔
Description
Keywords Crystallisation, polymer, polypropylene, melting

Authors

Order Code Name By-line Int/Ext Primary
E1 Conference Publication Example

Publications Entry

Reference Number  2004000200
Category           E1 - Conference Publications 2004 in 2005

Main Publication Details

This publication has been signed off and may not be edited further.

Title of Paper   A matrix-algorithmic approach to solving a preemptive priority queue with finite buffer
Publisher        University of Peradeniya
Place Published  Sri Lanka
Name of Conference International Sri Lankan Statistical Conference
Editor           B. M. de Silva and N. Mukhopadhyay
School check     ✔
Portfolio check  ✔
Description      Finite buffer, computational algorithm, preemptive priority, stationary distribution, waiting time

Authors

<table>
<thead>
<tr>
<th>Order</th>
<th>Code</th>
<th>Name</th>
<th>By-line</th>
<th>Int/Ext</th>
<th>Primary</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>23240</td>
<td>Dr Panlop Zeephongseuk</td>
<td>Dr Panlop Zeephongseuk Internal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>43197</td>
<td>Dr Anthony Bedford</td>
<td>Dr Anthony Bedford</td>
<td>Internal</td>
<td></td>
</tr>
</tbody>
</table>
5. Amending Publication Records

To correct mistakes, first find and open the affected publication and edit it.

5.1 Incorrect Year

• Type in the new, correct, year.
• Save the publication.

5.2 Incorrect Category

Click the ‘change category’ link found at the very bottom centre of screen and select the new, correct, category.

Change Category

5.3 Incorrect Chapter attached to wrong book?

Click the ‘change book’ link and select the new, correct, book title. The link appears next to the book code that has been allocated to the record.

Book Title 0000015543  Change Book

5.4 Incorrect Author, Classification or AOU

Remove the wrong item then add the correct item instead.

6. Changing the Layout/Display of Records

The PWI allows you to choose from several different displays for the main page. These show you the data you have selected in different ways or different orders. Some are particularly suitable for data entry people, others allow you to see ranked information or help you with the verification process.

To choose a layout, click the change display link from the front page.

Each time you log into the PWI, the layout you were last using is automatically reselected.

Six different layouts are currently available:

6.1 Most Recently Used

This option shows date/time created, category, author/s, title and code. It is ordered with the most recently created publications at the top. This option is particularly convenient for data input users.

6.2 Author Surname Order

This option shows author/s (in bibliographic format), title, category, code and raw and government weightings. It is displayed in author name order.

6.3 Category order with totals

This option shows category, author/s (in bibliographic format), title, code and raw and government weightings. It is displayed in category name order. This option may be useful for cross-checking for government returns.

6.4 Verification order

This option shows code, title, category and verification status, displayed in code order. It also provides the option of verifying the selected publications.

6.5 Missing Information Report

This option shows code, title and missing information details. It is ordered by code.

6.6 Author Ranking Report

This option shows all internal authors and their publications. The authors are listed by surname order; the publications in ranked order, with unranked publications last. This is particularly useful for identifying an author's "Top Four" publications. Note: ranking information is applicable to New Zealand only.
7. Printing and Reporting

7.1 Printing
The Publications Web Interface is designed primarily as a data entry tool. Various printouts are available to assist with data entry and the verification of data that has been entered.

For government and other corporate reporting requirements, the extensive range of reports available in RM4 are used.

The three steps required to produce a print out are
- Find the right data.
- Select the correct layout.
- Change to printer friendly view.

Finding the right data
Use the selection options to find the correct data.

Selecting the correct layout
Select the layout that best suits your needs.

Changing to printer friendly
The main page and the data entry page both have a 'printer friendly' option available. This option redisplays the selected data without menus, navigation bars and other distractions.

Use the PRINT button on the browser toolbar to print out the page. Most pages will look their best if printer setup is changed to 'landscape' view.

7.2 Keeping track of your data

Keeping track of work in progress
- use "data entry order" view
- set "show records I have created only" to yes
- set year published to current year

7.2.1 Showing all work for a particular department
- use any convenient view
- check that "more search criteria" is ticked
- enter the name of the Department in "AOU Name" field. Use * wildcards if you are not sure of the full name of the department.

7.2.2 Showing all work for a particular government return
From the main page, tick the 'More Search Criteria' check box. In the criteria section,
- Un-tick 'Show records I have created only'
- Tick the 'Government Collection Only' check box
- Erase (blank out) any value in 'Year Published'
- Enter the desired year of government return in 'Collection Year'
- Click 'Search Now'

7.2.3 Identifying missing information
Change the view to 'missing information report'
From the main page, enter any search criteria you may desire. Include the 'Records: incomplete' option if you only wish to see publications which have not had their data entry finalised.

Indicates that the publication has not been marked as having data entry finalised.
Indicates that all essential data has been included and the data entry finalised.

If data is missing, the final column of the display shows what is missing.
8. Verification and Sign-off

Verification is the process of checking that information provided exists and is correct.

ResearchMaster provides for up to 3 levels of verification for publication, as well as a final sign off. The levels of sign off are linked to the available user levels.

- A school level user can sign off at department level
- A portfolio faculty level user can sign off at department or faculty level
- An all level user can sign off at school, portfolio or all level. They may also complete the final sign off.
- Once a publication has been given the final sign off it can no longer be edited within the Publications Web Interface.

8.1 Verification

Retrieve each publication in turn and verify that all required information is entered. If this is the first level of verification you will usually be required to confirm that all required information is there:

- Tick 'publication complete'
- Click 'save'
- You may now scroll down to the 'Verification Details' section. For the level or verification you wish to undertake
- Tick the box in the Verified column
- Enter the date (usually today's date)
- Click 'save'

8.2 Final Sign Off

Final sign off is done in batches from the main page.

- Select the publications to be signed off using the search
- Change the display to 'Verification'
- Click the 'final signoff' button.
- all selected publications that are data complete (ie have all essential information entered) will now be signed off
- any publications that are still missing data will not be signed off.