

PES Instructions

System access

To access the system:

1. Obtain a user name and password from Tammy Harvest (x7456)
2. Start Internet Explorer or similar web browser
3. In the Location box type <http://www.utas.edu.au/research/quick-links/publication-entry-system>
4. Click on Publications Entry System
5. Type in your user name and password.

Options from the PES home page

From the Home page you can enter a new publication, change information for an existing publication, display and print a list of publications for a specific department, display in research report format, delete a publication and download your school's publications to a software package such as EndNote.

To edit an existing publication or create a list of all publications for a specific department click on change. Select the department and click on the LIST PUBLICATIONS button. On the left hand side of the list you have the options to edit, delete or cancel. EDIT will allow you to change the details in a publication, DELETE will delete the publication and clicking on CANCEL will take you back to the home page.

DISPLAY will give a detailed list of your department's publications by publication year.

These options can also be accessed by clicking on the appropriate button at the bottom of the home page.

Entering a new publication

1. Select NEW publication.
2. Select the appropriate publication reference type from the pull down menu. For assistance, refer to the [Publication Reference Types manual](#).
3. Enter the total number of authors on the publication (not just the number from your school).
4. As your user name and password are linked to your school, the name of your school should appear at point 3. When you enter the system you will only have access to your schools entries.
5. Select SUBMIT CHOICES, or if you have made a mistake you can RESET the form, or CANCEL.

Once you have submitted these details, a new form will appear called PUBLICATION DETAILS.

The details required will depend on the type of publication selected in 2 above. Possible fields are described below.

Author details

For each author a box is provided for surname, initials, department and classification. You can verify the existence (or otherwise) of an author by clicking on the box as shown below. A list of personnel currently held on the database will be displayed. If the author you require is listed, click on the author's name, and the Organisational Unit and Classification fields will be populated. These fields can be changed if the author was in a different organisational unit.

You can also manually enter the author details. Do not use full stops in the author's initials field. To enter the school and classification select the appropriate entry from the pull down menu.

On saving, if any of the authors were not found in the ORS staff list they will be indicated with a red asterisk (*) and the publication will be marked as *not yet valid*. Clicking on the authors name will take you directly to the Add New Author form.

The screenshot shows a web form titled "Publication Details (Journal Article)". Under the "Author 1" section, there are fields for "Surname:", "Initials:", "Organisational Unit:", and "Classification:". The "Organisational Unit" and "Classification" fields are dropdown menus. To the right of the "Initials" field is a button with three dots and an "alt" button. An arrow points from the "alt" button to a text box on the right. Below the form is a window titled "Select Internal Author - Netscape" showing a list of authors with columns for name, title, and department.

Author Name	Title	Department
Smith, A	Mr	Management
Smith, AE	Mr	Centre for Research and Learning in I
Smith, AJ	Mr	Plant Science
Smith, AM	Miss	Deputy Principal's Division
Smith, AP	Mr	Deputy Vice-Chancellor's Division

Alternate name field allows you to display a different name for this author on this publication, but still link to the author listed by HR.

You can also verify the existence (or otherwise) of an author or add new student authors to the personnel list from the publications home page. When new names are added to the list, an email is sent to the ORS. Student Administration is then consulted to verify the student.

The authors names and details must be entered in the order that they appear on the publication.

A field exists in the author details section for Book Chapters called 'Chapters Contributed'. The purpose of this field is to allow automatic calculation of the chapter values as per the DIISR specifications. The 'Chapters Contributed' field refers to the total number of chapters that each author was a contributor in that book. This field must be entered for each author.

Publication details

The information required depends on the Publication Reference Type selected. Each field must be completed.

Collection Year

The only year available to enter is 2011 (or OTHER, used for non-UTAS items. See below under WARP).

Publication Year

The year of publication for the current collection is 2011. Previous years publications may be entered as long as they have not been already been included, but in this case, they will not be counted for the DIISR data collection.

Title

Enter the title exactly as it appears on the publication. Take care that the formatting is also the same as the original publication. However, if the title appears in all capitals, use title or sentence case in PES. **Do not put a full stop at the end of the title.**

Text formatting can include italics, superscripts, and subscripts. For example the text is switched to italics by typing `<i>` and back to normal with `</i>`. Thus entering the following:

a study of `<i>Eucalyptus nitens</i>` in Tasmania **will appear as** a study of *Eucalyptus nitens* in Tasmania.

Formatting is as follows:

mode	start mode	return to normal
italics	<code><i></code>	<code></i></code>
superscript	<code><sup></code>	<code></sup></code>
subscript	<code><sub></code>	<code></sub></code>

Users familiar with HTML will know that other formatting options are available, but those listed in the table above are the only ones that should be used here.

A range of special characters and Greek characters are available, refer:

[Special characters PDF](#)

[Greek characters PDF](#)

For example, the copyright symbol is obtained by typing `©`

You will see the resulting formatted text when you have saved the form at the end, and will be able to select EDIT or CHANGE if necessary.

Special note for MACINTOSH users:

Macs currently have a limitation that will not let you enter more than 250 characters in the title box. For Mac users only, PES provides an extra two boxes for title entry - allowing a max of 750 characters. You will have to be careful that no extra spaces are entered and that formatting with html is correct. Once saved, you will see the resulting text displayed. Check this carefully to ensure that all spacing and formatting are correct.

Publication category

Select the publication category from the list in the pull down menu.

Funding source

A list of options is available from the pull down menu. For descriptions, refer to:

[Funding source codes](#)

Internal grant reference

This identifies if the publication is connected to a specific project. The Internal Grant Reference number is generated by Research Services and can be found by browsing WARP Level 2 – Funded Research.

Page numbers

The Page numbers should be in the form 'i-n' where 'i' is the first page of the entry and 'n' is the last. Multiple groups of pages should be in the form i-n, j-m. for example i-vi, 223-243 for an entry where the author wrote the preface and one of the chapters. Don't use unnecessary spaces. If the publication was published in an electronic journal, **EJ** should be entered in the page numbers field.

Other numerical fields

Fields such as Issue, Volume and Edition should be entered in the same way as page numbers, that is using numbers (1,2,3) or Roman numerals where appropriate. Numbers should NOT be spelt (one, two).

Do not enter the year in the issue field - eg Aug 04 - as the year already appears in research report format. If issue is a month - shorten eg Nov, Dec, if using date enter as 13 Jan.

Exclude from HERDC

This field should only be checked for those publications in a DIISR category (A1, B1, C1 and F1) where you are unable to provide the required verification material. However, the publication must still meet all the criteria of the category. Where this box is checked, the publication will not be counted for the DIISR return, however the publication will appear in the Research Report.

FOR, SEO and TOR

Enter one code for each of the field of research (FOR), socio-economic objective (SEO) and type of research (TOR). The codes are available from the ORS web site. These codes must be given for every publication entered. Refer (respectively):

[ABS website – Field of Research codes](#)

[ABS website – Socio-economic objective codes](#)

[UTAS website – Type of Research codes](#)

Theme areas

Only if the research leading to the publication was in a theme area, should a theme area be identified for the publication.

Additional information

This field may be used to annotate the entry.

Other data entry fields

The fields described above apply to all publication types. Additional fields will appear for all publications but will vary according to the type.

General formatting

Mandatory fields - don't use unnecessary spaces (e.g. in page numbers or at the end of fields).

Conferences - the date of the conference is not required - if you wish to store it, do so only in the 'Additional Information' field.

Editors names - don't use full stops and enter initials before surnames. eg: WM Smith, KL Bradbury and G Macintosh

If you have got it badly wrong - select RESET to clear all the information from the form. No information is saved and you can scroll back to the beginning and start again. Select CANCEL at the bottom of the form to exit without saving information you have entered.

Saving your publications

When you have completed all fields select SAVE. If essential information has not been entered you will receive a message that information is missing or incorrect and you will be directed back to the form. **No information is saved at this stage.**

Provide the missing or corrected information and select SAVE. A summary screen headed "Saved Publications Details" will appear. The publication information is now saved. **For DIISR publications print this page to add to the verification material.** You can make changes by clicking on CHANGE or at a later stage by clicking on EDIT. If any of the authors were not found in the ORS staff list they will be indicated with a red asterisk (*) and the publication will be marked as *not yet valid*. Clicking on the authors name will take you directly to the Add New Author form.

You can also verify the existence (or otherwise) of an author or add new authors to the staff list from the publications home page.

If you find that you have insufficient information to complete the record you can **save the incomplete record** by selecting SAVE NOW from the Publication Year box (scroll up). The information in incomplete records will not be displayed on WARP until the record is edited and mandatory fields are completed.

Shared publications

Many publications have authors from two or more UTAS schools/disciplines. Only one academic organisational unit (AOU) need enter the publication – it does not matter which. The academic coordinator of the other school(s) will be emailed automatically by PES to advise them that the item has been entered. The publication will appear in both lists, however, only the originating school will be able to edit the item. Any changes will need to be coordinated through the person who entered the item (their name will appear on the email). If two schools both enter the publication (you will see two items the same in your list and you will have received an email), one school must delete their entry. Only the originating school needs to submit the verification material to the Office of Research Services (for those publications that are HERDC eligible).

For reporting purposes, there will be no difference i.e., the publication will appear in both Research Report lists and the appropriate share of the publication will appear against each AOU.

Spell checker

A spell checker has been added to PES to assist data entry staff. To run a spell check on your publications, choose the CHECK SPELLING option from the main menu of PES. Confirm the year that you would like to check and click on LIST PUBLICATIONS. Words that the spell checker does not know will appear underlined and are actually hyperlinks. Click on a word that is underlined, and a spell check box appears. As with other spell checkers you can add the word to the dictionary, change or ignore. The spell checker will automatically move through all unknown words in the list.

WARP

The Web Access Research Portal (WARP) was launched on the ORS web site in March 2001. WARP enables users to gain access to live data held on the Research Management Database, including publications data. As a consequence there are a few things that you should be aware of:

1. Data entered into PES is now instantly available in WARP. Level 1 is a public site.
 2. New options in PES allow for publications not affiliated with UTAS to be entered (use a collection year of OTHER).
 3. In-press items can now be entered using the current collection year with a publication year of IN-PRESS. Once the item is published simply change the publication year.
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