

## SIGARRA PUBLICATIONS MODULE User Guide

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#### INTRODUCTION

The publications module on the SIGARRA platform reflects the scientific output of the institution's educators. FEP uses this tool to assist in the production of scientific activity reports for various purposes. This is a University-wide module, thus encompassing authors from various areas of study and Constituent Entities (CE) and feeding the UP's open-access repository, which in turn feeds the RCAAP. The module becomes particularly relevant in the context of its interaction with other important SIGARRA modules, as demonstrated in the following diagram:



Figure 1 - Interaction with other modules and systems Source: UP Digital Publications Manual

The publications module has evolved over time, with its integration with the <u>Authenticus</u> system representing an important advancement that facilitated information input and allowed for greater data consistency.

The Authenticus system is a project developed by the University of Porto and CRACS/INESC

TEC and co-financed by the FCT with the goal of building a national repository for metadata on publications written by researchers affiliated with Portuguese institutions. The system imports publications from multiple indexing databases, provides a specialised interface for researchers and institutions to validate or reject the proposed associations and allows for interoperability with other systems. Currently, Authenticus aggregates publication information from the following sources: SCOPUS, ISI Web of Science/ISI Web Knowledge, Cross Reference, Google Scholar, DBLP and ORCID.

The SIGARRA publications module and Authenticus both provide online manuals, FAQs and other tutorials that should be consulted in any event of doubt.

The following sections succinctly explain how to work with the publications module in a manner that is intuitive and that helps increase productivity, avoiding redundancy when entering information, information duplication and possible inconsistencies resulting therefrom.

**IMPORTANT:** A publication may be uploaded directly to the SIGARRA system, but this should only be done when the publication does not exist on any of the sources that feed Authenticus, which are SCOPUS, ISI Web of Science/ISI Web Knowledge, Cross Reference, Google Scholar, DBLP and ORCID.

It is highly recommended to use the following flow:



## VERIFYING A PUBLICATION ON AUTHENTICUS

To verify a publication on Authenticus:

- a. Access Authenticus at https://www.authenticus.pt/.
- b. Click on Sign in -» Local Sign In and proceed to the Federated Authentication (Autenticação Federada) using your institutional email and SIGARRA password (see Figure 2).



Figure 2 - Federated Authentication on Authenticus

**c.** After logging in, the **My Data** section provides access to all of the author's data (see Figure 3).



Figure 3 - Navigation bar on Authenticus

d. In Profile (Perfil), all the author's data can be viewed and/or edited, such as names

Syncronizations	>	Áreas Científicas		C Editar	Research Fields	C Editar
Para Validar	>					
Confirmadas	>	✓ Mostrar todas			✓ Mostrar todas	
PUBLICAÇÕES		Maria Lúcia de Jesus Pato	ides Porteia Forte	0	Portuguese Journal of Social Science	0
Perfil	>	Renuga Nagarajan	na	0	Research Policy	0
MY DATA		Sandra Maria Tavares Silva Sara Cristina Santos Cruz	1	000	Scientometrics Journal of Developmental Entrepreneurship	000
C Editar Investigador My Editors	0	Co-Autores		Gf Editar	Revistas/Conferências	C# Editar
Permissions Box		ID ORCID	0000-0002-3191	-5217		
		Scopus Author ID ResearcherID	<ul> <li>23986450300</li> <li>B-5859-2009</li> </ul>			
			aurora.teixeira@fc	.up.pt aurora.te	eixeira@inescporto.pt aurora.teixeira@inesctec.p	ot
		Email(s)	aurora@fe.up.pt aa	cteinescporte.pl	t aactëinesctec.pt ateixeiraëfep.up.pt ateixeira	elfep.up.pt
i AuthID: R-000-21	NR	(s) uo Autor	Teixeira, AAC; Teixe	ira, A; Teixeira, A	A; Teixeira, AAC; Teixeira, AC; Teixeirab, AA; Aurora	Amelia C
		Iniciais Nome(s) do Autor			· Aurora Castro Teixeira: Aurora Teixeira	Castro
		Nome(s) Próprio(s)				
		Sobrenome(s)				C Editar

used, emails, scientific areas, etc. (see Figure 4).

Figure 4 - Author's profile picture on Authenticus

e. The Confirmed (Confirmadas) section contains all confirmed publications, organised by database type (sources) and conveniently updated with their respective citation(s). They may also be ordered by document type and year (see Figure 5).

							_				_
JI -		C.	×.	5	Todos os Tipos de Documentos	$\sim$	2004 ~	-	2021	Ano Dsc	$\sim$
	•	× .	-				2001				

Figure 5 - Header of the list of confirmed publications on Authenticus

f. The "To Validate" ("Para Validar") section contains the Publications awaiting confirmation (Publicações a aguardar confirmação), which are those pending verification by the author, presented in three distinct publication lists: Identified (Identificadas), Duplicates (Duplicadas) and Selected (Selecionadas) (see Figure 6):

Identificadas 1	Duplicadas 🚺	Selecionadas 0	Removed	
TÍTULO: Spatial an AUTORES: Cruz, S FONTE: ANNALS C INDEXADO EM: •	alysis of new firm formation in SCS; <u>Teixeira, AAC</u> ; IF REGIONAL SCIENCE, PUI Scopus: 0 <b>C</b> Wos: 0	creative industries before and BLICAÇÃO: 2021	during the world economic crisis 🖹	Full Text Minha? () Sim () N O meu nome de auto Teixeira, AAC () Adiar decisão

Figure 6 - Publication awaiting confirmation by the author in Authenticus

- Identified Publications that Authenticus has identified as having a high likelihood of belonging to the associated author. If the publication does not belong to you, you should select "no" ("não"); those marked with "yes" ("sim") and that are correctly associated are moved to the confirmed publications (publicações confirmadas) list. At the end of the list, you should confirm the selected publications (see Figure 6).
- **Duplicates** List of repeated publications where you should select only the correct one, or join them in the case of different indexing.
- **Selected** This is where you can find added publications awaiting confirmation by Authenticus, and where you can make changes to name formats if incorrect.
- **g. Synchronisations** This is where you can run a synchronisation with the databases associated with Authenticus.
- h. Add New Publication This is where you can add publications missing from Authenticus using a search of the WOS/SCOPUS databases, or using the publication's DOI. Various publications can be added simultaneously, separated by a comma, semicolon or on separate lines, and then clicking on Next (see Figure 7).

Inserir DOI dar	publicações		
We will search W Exempto de DOI	09, Scopus and CrossRef databases for the publication 10.1007/s10658-013-0301-4	15.	• Topa
Usar virgale O	una nuva linha como separadores.		
Adicionar Publi	cações Boopus		
Adicionar Publi	cações Web Of Science		

Figure 7 - Add publication to Authenticus using its DOI

- i. All found publications will stay on the list of publications to validate, where they should be verified and confirmed by their authors.
- J. Statistics Besides allowing for the consultation of all statistics by index and citations, this option also allows you to update validated publications by clicking on Update Statistics (see Figure 8).

separcher Statistics are extraced ding	mically based on your <b>validated</b> publications	
sources oracistos die extraced una	moury based on your <b>Fundation</b> publications.	
	CUpdate My Publication Citations	Jpdate My Publication Statistics

Figure 8 - Update added publications and citations on Authenticus

### SYNCHRONISATION WITH AUTHENTICUS

Synchronisation with Authenticus allows new publications and/or updates to be imported to SIGARRA, which are always recorded on the publication's base version. An author's publications will be updated whenever there is a synchronisation request.

Once Authenticus has automatically synchronised the ISI and/or SCOPUS indices, the citations will be automatically updated, even if they have already been validated; after this point, however, it will no longer be possible to edit, delete or upload via SIGARRA.

After verifying the publications on Authenticus, you should run the synchronisation with SIGARRA from the Dashboard of your personal page by following these steps:

- a. Log in to SIGARRA.
- b. Dashboard -» synchronise with Authenticus.



Figure 9 - Synchronise Authenticus with SIGARRA

#### ADDING A PUBLICATION TO SIGARRA

**a.** In the SIGARRA publications module, select the **New Publication (Nova Publicação)** option from the right sidebar menu (see Figure 10).

squisa de	Publicações		Nova Publicação
Autor	✓ ➡ Maria Paulina Ramos Preto	Pesquisar Limpar	Revista Pesquisa de Revistas
			Nova Revista
Não foram encon	tradas nublicações		Editora
Nuo Iorum cheon	uuus puokuyots.		Pesquisa de Editoras
			Nova Editora
			Índice
			Lista de Índices
			Pessoal
			Ver Dashboard
			Sincronizar com o Authentico

Figure 10 - Upload a new publication to SIGARRA

Fill in the required fields, such as Publication Title, Type of Publication, Date of Publication and DOI, when applicable, and click on Create Publication (Criar Publicação) (see Figure 11).

va Publicação	Publicação Pesquisa de Publicações
Oc campos assinalados com 🔹 são da proanchimanto obricatório	Revista
es campos assinanteses com + sao de precirciminento obrigatorio.	Nova Revista
Título *:	Editora
Tipo *:	Pesquisa de Editoras
Data de Publicação: (Ano *-Mês-Dia)	Nova Editora
	Índice
DOI:	Lista de Índices
	Pessoal
	> Ver Dashboard
Participantes —	Sincronizar com o Authent
	Ver as Minhas Publicações
Criar Publicaçã	ão Administração
	Ver Dashboard

c. Identifying the type of publication is very important, given that this will determine the fields to fill in to correctly identify the publication, and should be selected from the list of Types (Tipos) (see Figure 12).



#### Figure 12 - List of Publication Types

Add the Participating (Participante) [author(s)] in the same order as they appear in the publication; choose if they are internal (interno) (UP) or external (externo) so that the affiliations may be appropriately associated. You must ensure that the Name Format (Forma de Nome) has been correctly configured in the Dashboard; for UP users, simply perform a search by clicking on the field with a green arrow (see Figure 13).

	•••
Tipo de Utilizador *	: Interno (UP)
For <u>ma de Nome *</u>	: Moreira, Manuela
Tipo *	: Autor
Afiliação *	: FEP Y
No. Destision	•
Novo Participani	le 📕
Tipo de Utilizador *	Externo 👻

e. Type of authorship (select from the available list - Author, Editor, Coordinator, etc. (see Figure 14).



Figure 14 - List of responsibility types

**f.** Add the maximum number of elements to correctly identify the publication in the source (e.g., for Conference Papers and Book Chapters, the fields for Book Name and ISBN should be completed).

**IMPORTANT**: The team with verification/validation privileges in the publication module can edit, change and delete information from the base version. These actions are made available when requested by the authors or when a correction is required to maintain the consistency of FEP's academic output database.

#### CONFIGURING THE NAME FORMAT IN THE DASHBOARD

 a. Configuration of the Name Format (Forma de Nome) is done through the Dashboard [Personal area -» Dashboard] and can be edited at any time by clicking on the pencil in the upper right corner (see Figure 15).

		Pesquisa de Publicações
	•	Nova Publicação
Dadaa Ratatíatiana	Formas de Norre	Pessoal
Jados Estatísticos	Formas de Nome	Sincronizar com o Authenticu
Publicações Nº	Moreira, Manuela (1) *	Ver as Minhas Publicações
Todas 1	* - Forma de Nome por omissão	
Com especializações <u>0</u>		
Do ano atual 1	A forma de nome por omissão não se irá	
Do ano anterior 0	sobrepor nas importações do Authenticu	s.
Como único autor <u>0</u>		

Figure 15 - Editing the name format in the Dashboard

b. If various name formats exist, the default format should be selected; if you wish for that <u>name format to overwrite</u> the format imported from Authenticus, simply select that option on the form (see Figure 16 and 17).



#### Figure 16 - Default name formats

Formas de Nome	
Nome	
Moreira, Manuela	
Moreira, MJR	

Figure 17 - Overwriting the name format of publications imported from Authenticus

At the end of the process, a base version of the publication with a unique ID will be created, and the page of the publication will have two buttons, **Verify Publication (Verificar Publicação)** and **Delete Publication (Eliminar Publicação)** (see Figure 18).

Figure 18 - Verify or delete publication

If the author of the publication clicks on **Verify Publication** on the base version, the system creates an <u>author's version</u> that will only be used in the Educator Evaluation Module (Módulo de Avaliação do Docente) (AVDOC) and CV. It should be noted that, as soon as an author's version is created, the verification/validation team (the Library) will no longer be able to edit the publication.

The author can **Delete the Publication** only if they are the <u>sole author</u> and if <u>it has not yet</u> <u>been validated by the services.</u> Otherwise, you must request its deletion from the Library.

## HOW TO CHANGE/CORRECT PUBLICATION INFORMATION

When the author who created the publication is the sole author affiliated with it, they may edit/change/correct the base version of the publication **before it has been validated by the services**.

Changes can be made in the base version and in the **authorship**, **scientific areas**, **indices** and **documents** fields.

To edit/change/correct a publication, follow these steps:

a. Personal Area of SIGARRA -» See **My Publications (Ver as Minhas Publicações)** -» select the publication (see Figure 19).

Pessoal
Ver Dashboard
Ver as Minhas Publicações
ver as minias rubicações
Administração
ver Dasnboard

Figure 19 - How to access the publication

b. After opening the publication, select the section you wish to change/correct (authorship, scientific areas, indices and documents). Click on the red pencil in the upper right corner to access the editable field.

anual d	e publicações da FEP
	Versão: Base 👻 Verificar Publicação Eliminar Publicação
Título	Manual de publicações da FEP 🔟 🔟 🔟
Тіро	Outras Publicações

Figure 20 - Editing fields

c. After correcting/editing/changing the desired field(s), click Save Changes (Guardar as Alterações) (see Figure 21).

	Versão: Base 🗸 Verificar Publicação Eliminar Publicação
Os campo	s assinalados com * são de preenchimento obrigatório.
Titulo *:	Manual de publicações da FEP
Tipo *:	Outras Publicações v
Data:	2021 - 4 - 7 (Ano *-Mês-Dia)
	Cancelar Guardar Alterações

Figure 21 - Save changes to the publication

## HOW TO ATTACH A DOCUMENT TO A PUBLICATION

Some publications require adding/attaching document(s), whether to prove their validation by the validation teams, as in the case of **Didactic Publications** – teaching support materials – or to simply make certain documents available.

Defining the method of accessing the documents is particularly important. As mentioned at the beginning of the manual, <u>the SIGARRA publications module</u>

#### feeds the UP Open-Access Repository, which in turn feeds the RCAAP.

To add a document to a publication, follow these steps:

 Personal Area of SIGARRA -» see my Publications -» select the publication -» open the publication -» **Documents** -» click on the red pencil in the upper right corner to edit (see Figure 22).

Outras Informações	Tipo (Avaliação Docente): Científica	× /
Documentos	Não foi encontrado nenhum documento associado à publicação.	

Figure 22 - Attach documents to the publication

b. Click on **Add Document (Adicionar Documento)** to upload the documents (see Figure 23).

bocumentos		
	Cancelar	Guardar Alterações
Os campos assinalados com * são de preenchimento obrigatório.		
🐼 Adicionar Documento		

Figure 23 - Uploading documents

c. Attach the documents from the personal area to the publication. One or more documents may be added; activate the markers **Upload Documents (Carregar Documentos)**, select and transfer them to the **Associated Documents (Documentos Associados ao Processo)** area by clicking on the arrows (see Figure 24).

Carregar documento Apagar marcados guia de publica (docx) 5126.8KB 2021-04-09	
Carregar ficheiro	
	×
$\leftarrow \rightarrow \checkmark \uparrow$ $\blacksquare$ > Este PC > Ambiente de trabalho > $\checkmark \heartsuit$ $\circlearrowright$ $\land$ Procurar em Ambiente de	e de tra
Organizar 🔹 Nova pasta	?

Figure 24 - Diagram of how to add documents

- to close the window (see Figure 25).
- d. After transferring the document(s) to the **Associated Documents** area, click on the **X** to close the window (see Figure 25).

Figure 25 - Transferring the documents from the local area to the publication

e. Select the type of access to the publication from the available list (**Embargo**; **Faculty Only**; **Open**; **Authors Only**) and then **Save Changes** (see Figure 26).

e Publicações_2021_SDI.docx 🗱 escrição: Acesso *:
escrição: Acesso *: Embargo 2 Publica Restrito à Faculdade
Acesso *: Embargo Publica Restrito à Faculdade
Embargo Publica Restrito à Faculdade
Abarta
escrição: Restrito à Universidade
Acesso *:
r Documento
i Existem alterações que não foram gravadas. Cancelar Guardar Alterações
D

Figure 26 - Select type of access

**IMPORTANT:** The document(s) added to the publication will become available/visible on the U.PORTO Open-Access Repository and, consequently, the RCAAP, so take care when selecting the type of access.

f. In the example shown below, the chosen access type is **Authors Only**, so that only the authors of the publication may access the documents (see Figure 27).

Nome do Ficheiro	Descrição	Tamanho	Tipo de Acesso	
Guia de Publicações 2021_SDI		5126.80 KB	Restrito para os Autores	
Guia de Publicações 2021_SDI		747.01 KB	Restrito para os Autores	

Figure 27 - Presentation of the documents attached to the publication

# PROBLEMS WITH THE SIGARRA PUBLICATIONS MODULE OR AUTHENTICUS – WHERE CAN I GET HELP?

**Tutorials/Manuals:** 

SIGARRA:

 SIGARRA Publications Module Manual, available at: https://sigarra.up.pt/reitoria/pt/web base.gera pagina?p pagina=1022087

AUTHENTICUS:

- The following link contains tutorials and other information about Authenticus: <u>https://www.authenticus.pt/pt/home/view\_article/10</u>.
- You can also watch short videos available on the Authenticus YouTube channel at <u>https://www.youtube.com/playlist?list=PL5j27FM02NQl1VdJ3OL6IrDgRsUErJDT5</u>, where the available options are explained step by step.

#### Help contacts:

- Email: <u>biblioteca@fep.up.pt</u>
- Telephone: 220426164; 220426161

**NOTE**: This Guide was created based on the SIGARRA Publications Module Manual and the Authenticus Tutorials.