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VERSION HISTORY

VERSION 2.0  INCORPORATING CHANGES MADE TO RESEARCH PROFILE FIELDS AND SUBMISSION PROCESS FOR 2014 RESEARCH OUTPUTS SURVEY

VERSION 3.0  CHANGE SCREENSHOTS TO REFLECT NEW SCREEN LAYOUTS
              ADD INSTRUCTIONS FOR LINKING PROFILE WITH ORCID ACCOUNT
              ADD INSTRUCTIONS FOR IMPORTING PUBLICATIONS FROM PUBMED AND ORCID
              ADD INSTRUCTIONS FOR BibTeX PARSING

VERSION 3.1  CHANGE SCREENSHOTS AND REFLECT NEW SCREEN LAYOUTS
              AMEND INSTRUCTIONS AROUND IMPORTING FROM ORCID ACCOUNT

VERSION 3.2  UPDATE SCREENSHOTS

VERSION 4.0  UPDATE SCREENSHOTS
              CHANGE DOCUMENT TITLE
              AMEND INSTRUCTIONS AROUND THE NEW SUBMISSION PROCESS

VERSION 5.0  UPDATE SCREENSHOTS TO REFLECT RE-DESIGNED RESEARCHER WORKBENCH
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Module 1: Introduction

What is the Research Outputs Survey?
Science Foundation Ireland carries out an annual survey of its active and inactive award holders to gather information on the outputs arising from its funding. In addition to programme planning and evaluation, the data we gather is used to demonstrate to pivotal stakeholders that continued investment in STEM research is justified. We do this by providing quantitative and qualitative evidence, derived from the annual survey, that our researchers are delivering a return to Ireland both in the short and long term.

The survey opens in SESAME each year in December and closes the following January and is completed via your research profile on SESAME.

The purpose of this document is to give clear Instructions on how to complete this survey.

What is the Researcher Snapshot?
For researchers who held active awards in the reporting period, as part of the Research Outputs Survey, you must ensure that your Researcher Snapshot on SESAME is up-to-date.

The Researcher Snapshots are pdf documents that are published in the Researcher Database on SFI’s website and are used by the Foundation to inform third parties about the work being carried out by SFI researchers, with particular emphasis on communicating their work to industry.

The Researcher Snapshots are generated from information entered into your profile by you such as your basic contact details, photo and other details completed by you in the Research Profile section.

You will be able to fully review and modify your snapshot before submitting to SFI for approval.

Research Profile Overview
Your Researcher profile consists of two main types of information.

- General information, ranging from contact information, date of birth, and nationality, to detailed information on key achievements and research outputs. See Module 2 for information on how to add / edit this data.

- Research Profile information which details your background, team composition and related research outputs. You can add any number of specific activity-based information such as Publications, Conferences/workshops organised, commercial outputs, impacts etc. to your profile and then choose the most significant ones to attribute to a specific annual report or application as required. See Module 4 for information on how to add / edit data in this section during the survey period.

It should be noted that you may update your profile / outputs at any time throughout the year. However, the approach may vary. The purpose of this document is to guide you through the update of your research outputs / researcher snapshot and submission of same.
Although the emphasis of this document is on the Research Outputs Survey, the creation and maintenance of your profile also simplifies the grant application process and annual reporting in a number of important ways.

Your profile is independent of any application, but certain information (known as transactions in SESAME), such as research funding, can be pulled from your profile into your application as required. In addition, general information including contact details and year of PhD (or equivalent) are automatically associated with your application.

For the preparation of annual reports you can select transactions from your profile. Conversely you can create the new transactions within your annual report, which will automatically update your profile.

**Logging into SESAME**

The SESAME Grants and Award Management System is accessed using the Internet and there is no requirement for the installation of SESAME specific software. You can access SESAME from any computer connected to the Internet from any location. However, the configuration of some browsers and internet infrastructure (popup blockers, firewalls, etc.) can restrict an individual’s access to the internet and as a result to the SESAME system. If you are having any such difficulties please contact your internal IT support team in the first instance.

The SESAME system is accessed using the following Internet address: [https://grants.sfi.ie](https://grants.sfi.ie)

1. Start your **Web Browser**.

   SESAME supports the two most recent versions of Internet Explorer, Chrome and FireFox.

   With Mac we recommend that you use either Firefox or Chrome.

2. Type the SESAME address into the address bar of your browser or click on this link: [https://grants.sfi.ie](https://grants.sfi.ie).

3. Press the Enter key or click the Go To button. The SESAME login page is displayed:
It would be a good idea to save this page to your ‘favourites’, as you will be using this page frequently.

### Pop-up Blocker Detection

If your browser has a pop-up blocker enabled, a warning message or banner may be displayed at the top of the SESAME login page, or once logged in. Consult the appropriate browser help facility in order to make the required changes to the browser settings.

You must choose the browser option to allow pop-ups from SESAME. If you do not enable pop-ups when using SESAME, many functions within the system will appear not to function, simply because the associated pop-up window cannot be displayed.

Sometimes you may find your browser will have more than one pop-up blocker installed through various toolbars, spam blockers, virus checkers etc.

All Pop-up blockers need to be disabled when accessing SESAME.

### Forget Password?

If you forget your password, click on the “Forget password?” link below the login button. Clicking this link and entering your email address will trigger an email to your email address with a new password.

In order to login you must:

Type your **full e-mail address** when prompted for your Username. Type your case-sensitive **password**. Click the **Login** button. (If you have forgotten your password, click on the “Forgot password?” link below the log in button).
You are logged into SESAME and the Researcher Workbench is displayed.

The workbench is divided into a number of areas.

- The main workbench area (or Home screen) in the centre of your screen from which you can access Research Outputs (during the reporting period); your Profile; open applications and other application / award-related activities.
- Shortcuts pinned to the top right-hand corner – including a link to your profile; user guides; helpdesk etc. These are always visible and can help you to navigate back to the Home screen above and other important areas of the workbench.

In these guidelines, we are concerned only with the Profile / Research Outputs section of your workbench and more specifically in submitting your profile during the Research Output Survey period. If you are looking for more general SESAME instructions, please refer to the Researcher User Guide for SESAME Award Management System accessible on our website.
Module 2: Managing your Contact Information

Updating your Profile

A very basic researcher profile will have been created by research office staff when they first add your contact details to SESAME.

- You do not need to update your profile in any particular sequence nor do you need to complete the process in a single session.
- You can log in as often as you need in order to complete your profile.
- You can start an SFI application or Annual Progress Report without completing your profile but you should have completed the mandatory fields (shown in red) before submitting them for review.
- You should remember to update your profile on a regular basis.

1. Log in to SESAME using the instructions in Module 1 and view your Researcher workbench.
2. You can access your profile by clicking on the Profile links in the main area of the Home screen on the top right of your workbench (red boxes).

The Profile page is displayed.
The profile screen consists of a General Contact Details (default); Additional Contact Details; Identifier details (where you can find your SFI PIN, your ORCID and other relevant identifiers); and Reports (full reports of all research outputs reported in a format which may be uploadable into other systems).

**Editing Basic Contact Information**

To edit your contact details, click on both the General and Additional Contact Information tabs enter the relevant data and Save.

1. Enter your **General Profile details** as appropriate.
   - Mandatory fields are indicated in red, all other fields are optional.
2. **Please ensure that any existing information is correct and up to date.**
3. **Click on Save.**

Remember, if you change your email address, you should also update your profile. You should then use your updated email address for future logins.
Module 3: Updating your Researcher Snapshot

Upon completion of this module you will be able to:

- Update your Researcher Snapshot
- Submit your Snapshot to SFI
- Extract your Approved Snapshot

The Researcher Snapshots are pdf documents that, once approved, are published in the Researcher Database on SFI’s website and are used by the Foundation to inform third parties about the work being carried out by SFI researchers, with particular emphasis on communicating their work to industry.

The Researcher Snapshots will be generated from information entered into your profile by you such as your basic contact details, photo and other details completed by you in the Research Profile section. You will be able to fully review and modify your snapshot before submitting to SFI for approval. **As this will be in the public domain, please ensure that you are satisfied that there is no confidential information included.**

***Please note that, since the introduction of the New Researcher Workbench, and on request from Researchers, the Researcher Snapshot has been moved from a separate tab into General tab of the Researcher’s Profile, where it sits below the research outputs data entry sections. See instructions below.***

**Updating the Researcher Snapshot**

1. Log in to SESAME using the instructions in Module 1 and view your Researcher workbench.

2. Navigate to your profile by clicking on the **Profile** buttons in the centre of the main Home Screen OR on the top right of your workbench (red boxes).

3. The Profile page is displayed.
4. Click on the **General** tab
5. Scroll down to below the Research Outputs section (i.e. Publications, etc)

6. Complete these fields as required. If you wish to use text formatting please use the formatting tools on each of the fields you are completing. Please refrain from copying and pasting already formatted text into these fields.

7. Researchers may also add a figure to their snapshot by uploading a picture in .jpg or .img format to the following field by using the Upload button beside “Please upload figure for inclusion in the Researcher Snapshot if appropriate”.

   This figure will appear under your Key Highlights and Impacts Arising from Research section on the completed snapshot.

8. Click on **Upload** below the field and then click on **Browse** to select the file from your hard drive before clicking Upload again.
9. Clicking **Save** on the main page will display the figure on the page and the snapshot.

10. Should you need to update or delete this figure, click on the **Upload** button beside it and click **Delete** or **Browse** to find another file and follow the steps above.

11. You can also preview your snapshot at any time in the process before submitting by clicking on the **Open** button beside Preview Snapshot.

**Previewing and amending the Researcher Snapshot before submission**

Your Researcher Snapshot will also pull information from other sections of your Profile and you will need to update and review these sections ahead of submission. You can preview your Researcher Snapshot by clicking on **Open** beside the Preview Snapshot section within the Researcher Snapshot tab.
This will open a PDF version of your snapshot. This is only a draft version of your snapshot and can be amended by going into the fields as specified below. After making changes across your profile, click the **Save** button at the bottom of the profile before opening the PDF in the **Preview** Snapshot section.

**Lead Applicant**

Your name will be pulled from the Edit Contact section of your Profile. Please ensure this is completed correctly. It will be extracted in the format of **Prefix_First Name_Last Name**

**Lead Institution Logo and Researcher Photo**

The standard logo for your Research Body will appear on the Researcher Snapshot PDF beside the Lead Institution section. This logo will be added by SFI and will appear automatically.

Under the Identifiers section of your profile you will be able to upload your photo which will display on the completed snapshot. This is detailed in Module 1 of this guide.

**Research Programme Description**

This section pulls from the Research Programme Description text section under the Researcher Snapshot tab.
Industry Partners (Collaborators)

A list of industry collaborators will automatically be included from the Non-Academic Collaborations section of your SESAME Research Profile. If you do not wish for an industry collaborator’s name to appear on your public Researcher Snapshot, you must specify this for the relevant industry collaborator in the Non Academic Collaborations section of the Researcher Profile. If on review of your snapshot, you are satisfied that the companies listed are interactions that you may make public, you do not have to take any further steps.

If you wish to amend visibility of any interactions you have previously included as part of your Research Profile, you can follow the steps below:

1. Navigate to your Profile tab of your profile and show the Non Academic Collaborations section.

2. Click on Open beside the specific record.

3. This will open the record. After ensuring that all other mandatory fields are completed, go the bottom of the record and review the field “Are you happy to share the information on this collaboration externally. Click here for information”. By clicking on the link you will be able to review how SFI will use this information.

4. Select Yes and the company name will be automatically added to your snapshot on SESAME. If you select No, the company name will not be added to the snapshot.

5. If you are creating new records for Non-Academic Collaborations, follow the steps above and ensure to review each entry to approve that the company name may be used by selecting Yes or No as in step 2(d) above.

Research Team Size

1. For each team member you have added under the Research Profile Team Members section you will have to confirm if you wish them to be included in your Researcher Snapshot as part of the Research Team Size.

2. To include team members on your snapshot please click on the Team Members section on your Research Profile.
3. Please note: For previously created transactions, you must go into each record and confirm whether the team member should be included or not. To do this please click on Open beside each transaction within Team Members and update the record.
4. If you have selected Yes on the “Include Team Member in Researcher Snapshot” section, this number will be counted and updated on your combined Researcher Snapshot document. This is calculated as you being one team member, and every additional team member is added to this calculation. These will be displayed on the Team Member Size section of the snapshot with the following logic: Small: 1-10; Medium: 11-25; Large: 25+

5. To view this click on the Open button beside Preview Snapshot.

**Expertise**

This section pulls from the Expertise text section under the Researcher Snapshot section of your profile.

**Infrastructure**

This section pulls from the Infrastructure text section under the Researcher Snapshot section of your profile.

**Key Highlights and Impacts Arising from Research**

This section pulls from the Key Highlights and Impacts Arising from Research text section under the Researcher Snapshot section of your profile.

**Figure**

If you have uploaded a figure to the “Please upload figure for inclusion in the Researcher Snapshot if appropriate” section, this will display below the Key Highlights and Impacts Arising from Research section on the PDF.
Contact Details

Your contact details will be automatically pulled from your SESAME profile on to your Researcher Snapshot in the following format:

Name:
Telephone:
Email:
Web:

Please also ensure that these details are correct on the basic contact details and the Additional Contact Details before submitting your snapshot.

Submitting your Researcher Snapshot

Once you have completed and reviewed all sections of your Researcher Snapshot, you can then submit the snapshot to SFI for review.

1. Click on the button **Submit to SFI** under the Researcher Snapshot.

2. You will get a pop up to confirm that the snapshot has been submitted.

3. Please click **Save** to view the history of the submitted snapshot

4. This will show the current snapshot under the View Current Snapshot section.

5. SFI will receive notification once you have submitted your snapshot. SFI may request revisions or updates to your snapshot. You will be able to make amendments to your snapshot and resubmit by clicking on the **Submit to SFI** button once gain.

6. **Once SFI has approved your snapshot, you will be able to see it under the View Approved Snapshot section**
Module 4: Completing the Research Outputs Survey

During the yearly Research Outputs period, you will be reminded in SESAME that you have to complete and submit your profile to SFI. During this period, an “Research Outputs” button will appear on your home screen as you log in to the system. By clicking this button you will be taken to the Research Outputs data entry screen. As you fill in the individual sections, you will be able to update and track your progress in a progress bar.

Please follow these instructions to complete a Research Outputs submission and Submit your profile during the current Research Outputs survey period.

Note: to update your Research Outputs outside of the survey period (or to update records from previous years), click on the Profile button on the home screen (or at top right) and navigate to the “Research Profile” tab. See module 3 of the general SESAME Researcher User Guide for instructions.

1. Click on the “Research Outputs” button (highlighted above) on your home screen and the following form will appear. You can use this form to keep track of what sections of the profile you have completed and what is outstanding. For each section, please select Yes/No from the drop down list. (Yes = section updated; No = section not yet updated). You will not be able to submit your profile if any of these sections are flagged as No.

For researchers who held an active award during the reporting year, the form contains the following items:
Significant Distinctions / Awards; Funding Diversification; Team Members; Innovation & Commercialisation Activities; Publications & Proceedings; Presentations; Academic Collaboration; Non Academic Collaborations; Conferences / Workshops / Seminars Organised; Communications Activities; SFI Funding Ratio; Education & Public Engagement (EPE); Technical Reports; Impacts and Researcher Snapshot
For inactive researchers, you are only asked to complete sections on Publications, Innovation & Commercialisation Activities; and Impacts.

Adding Research Output records

*Please remember that the purpose of this form is to facilitate the creation and update of records relating to the reporting year only.*

You CAN create records for other years but they will not show (and cannot be modified) from this form. Should you wish to edit data from previous years you must click on the Profile link/button at the top/bottom of the page and scroll down to the “Research Profile” tab.

1. Click **Add new** next to the Research Output section that you wish to modify by adding a new record.

2. Fill in at least all the mandatory fields (marked in red). Click **Save** and close the window.
3. While the record is now saved, it will not be visible under the Show / Hide list until you have clicked on **Save and Refresh** (you can also click on **Save** at the bottom of the page).

4. When you have added all records for a given Research Output type (say Publications) and you are happy with the summary statement (e.g. “You have published 3 journal articles...”), select **Yes** from the Confirmation drop down box for this section.

5. Click on **Save and Refresh** at the top / bottom of page. This will update the progress bar at the top of the form.

---

**Note:** For the most part, records are ordered according to a transaction ID; new additions go to the bottom of the list. With categories such as Publications and Proceedings, where you may need to add new transactions periodically, adding the most recent last will keep the list in date order, if so desired. Team members are ordered by Name.
Viewing or Editing records relevant to the reporting period

1. Click Show/Hide next to the Research Output section you wish to modify. This will show all records relating to the current reporting period only. To find out how to update records from an earlier period see the last section of this module.

2. Click Open next to the record you wish to edit.

3. Make the relevant changes and click Save and close the window.

Copying a record

If you wish to create a record that is similar to an existing one, click on Show/Hide next to the section in question. Then select the record you wish to copy and click on the Open button next to it.

1. Click on Copy. This will create a new record with all of the details of the original record included.
2. A pop-up window will appear, click on **OK**.

![Message from webpage](image)

3. A further confirmation pop-up window will open, click on **OK**.

![Message from webpage](image)

4. Make the necessary changes to the record and press **Save**. Close the window.

![Significant Distinctions / Awards](image)

**Deleting a single record**

If you wish to delete a single record, click on **Show/Hide** next to the section in question. Then select the record you wish to delete and click on the **Open** button next to it.
1. Click on **Delete**.

2. A pop-up window will appear, click on **OK**. **CAUTION:** This cannot be undone.

3. Close the window.

**Deleting multiple records**

If you wish to cancel multiple records:

1. Click on **Show/Hide** next to the section in question.
2. Click **Open** next to any record.

3. Then click on **View List** at the top left corner.

4. Select the records you wish to delete and click on the **Delete** button on the bottom left corner.

5. A confirmation pop-up window will appear, click on **OK**. **CAUTION:** This cannot be undone.
Tracking Progress / Marking a Section Complete

As you may be updating your records over a number of days, you may wish to keep track of which sections are complete so that you do not have to revisit them prior to submission. To do this:

1. Click on **Save and Refresh** at the top /bottom of the page to ensure the summary statements capture all recent updates.

2. Once you are happy that you have added all records to a given section and that the summary statement(s) for that section are accurately reflecting your outputs, select ‘Yes’ from the confirmation drop down box within that section.

3. Click on **Save and Refresh** again and the progress bar will update to reflect this progress.

4. When all sections are marked as complete, the progress bar will rise to 94%. To complete your Research Outputs submission, you must click on Submit at the bottom of the page. Only then will the progress bar go to 100%.

5. Please note that you will not be able to Submit if any of these drop down boxes are set to No or are blank.
Checking your Researcher Snapshot

1. The final section in the Research Outputs form is the Researcher Snapshot. The summary statement will let you know the status / action required. Unfortunately, however, you cannot view your snapshot from this form.

   a. If the summary statement indicates that your Snapshot is submitted and under review by SFI, you may select Yes from the Confirmation drop down box to mark it as complete.
   b. If the summary statement indicates that you have not yet submitted a Snapshot or that your current Snapshot requires revision, proceed to Step 2 to update and submit an up-to-date / revised Snapshot.
   c. If the summary statement indicates that your Snapshot has been approved you should proceed to step 2 simply to check that you are happy that the Snapshot is still current.

2. Click on Back to Profile or Profile on the bottom or top of the page.

3. This brings you back to your main profile. Scroll down past your research output data to the Researcher Snapshot tab.

4. If your Snapshot has previously been approved by SFI, scroll down to view the approved Snapshot. If you are happy that it is up to date, skip to step 9 below to return to your Research Outputs Survey, otherwise proceed to update and submit your Snapshot.
5. **Full instructions for completing the Snapshot are in Module 3 above.**

6. Scroll down and click on **Save**.

7. Scroll down and click on **Submit to SFI**.

8. A pop-up window will confirm your successful submission, click on **OK**.

9. To return to the Research Outputs checklist and to submit your profile, click on **Update Progress / Submit** next to the progress bar.
10. Scroll down and select 'Yes' from the drop down box next to Researched Snapshot.

**Submitting your Research Outputs**

1. When you have finished filling the sections and are happy with the summary statements below each heading, select 'Yes' from the drop down boxes within each section. Please note that you will not be able to Submit if any of the answers are No.

2. If there are entries under a given section where mandatory fields have not been completed, these will be highlighted in red under the relevant section heading. You will not be able to submit your profile if these records are not completed.

3. Please review the summary statements under each heading carefully. Make sure you are happy with all of them and that you have selected the option ‘Yes’ next to all sections. Finally, at the bottom of the checklist, click on Submit.

To update older or future outputs, please click the ‘Back to Profile’ button at the bottom of the page and navigate to the ‘Research Profile’ tab. For further instructions, please refer to the Researcher User Guide for SESAME Award Management System accessible in: http://www.sfi.ie/funding/award-management-system/.
Updating Older Research Outputs (not relevant to the current reporting year)

This purpose of this document is to provide instructions for completing your Research Outputs Survey for the year just gone. The form used for this purpose, therefore, allows for the update of records for that year ONLY.

However, you can still add / amend records related to any year directly in your profile, without using the Research Outputs 20XX form. To do so:

1. Click on Profile from your Home Screen; or click on Profile in the top right corner from any screen.

2. Under the “General” tab scroll down to the Research Outputs section.

Each output / transaction type has associated Add new and Show buttons next to them, similar to the Research Outputs form, which allows the user to create new transactions and view existing transactions, respectively.

A number (in parentheses) next to each heading represents the number of transactions listed under that heading e.g. Funding Diversification (2) indicates that there are two Funding Diversification transactions entered under this heading. The user can either click on the Funding Diversification heading or the “Show” button to view this record. Clicking on the header or the Hide button will hide the details again. The following transaction types are available.
Education
Employment
Professional Societies
Significant Distinctions/Awards
Funding Diversification
Team Members
Innovation & Commercialisation Activities
Publications & Proceedings
Presentations
Academic Collaboration
Non Academic Collaborations
Conferences / Workshops / Seminars Organised
Communications Activities
SFI Funding Ratio
Education and Public Engagement (EPE)
Technical Reports
Module 5: Importing Publications

In addition to manually entering publications, there are alternative facilities within SESAME to import publications individually and in bulk from external sources.

It should be noted that only a certain number of fields will be imported. Any remaining fields will have to be manually entered to complete the record.

Importing from Pubmed

To import publications from Pubmed:

1. Open an existing publication or click on Add New.
2. Click on Search Publication Database
3. Enter criteria to search for records within pubmed and click on Search.
4. A list of publications satisfying the criteria entered will be returned (20 results per page). Click on the check boxes next to the publications that you want to import from the first page of results.
5. Scroll down and click on Add

6. Click on Create Transactions
7. The records will be added and the window will close, bringing you to a list of your current publications. Close the list to return to your profile. To refresh the view and see the new records on your profile, click on Save.

8. The records will be visible on your profile. The record will be marked as incomplete. Please refer the section “Completing Imported Records” (page 37) for instructions on how to complete the records.

**Importing from ORCID**

Please follow these steps to secure a connection to your ORCID profile.

1. From the Research Profile tab click on the ORCID Import button next to the Publications & Proceedings output type.

2. This will open a new ORCID window.
3. If you have an ORCID account, click on Sign In. Otherwise, create an ORCID account by clicking on Register. Complete the registering or sign in and grant access by clicking on Authorize.

4. You will get a confirmation message

5. Click on Close, then save your profile.
6. Now click on the **ORCID Import** button again beside the Publications & Proceedings and this will display a list of the publications listed on your ORCID account.

7. If a publication is already on your profile, it will be flagged with a red “Yes” under the Publication Exists (if there is a record with this DOI on your profile) or Previously Imported from ORCID (if you have previously imported the record from ORCID – details are in the right most column of this window).

8. **Select the records** you want to import to your SESAME profile and click on **Import**.  
   
   **NOTE:** As your ORCID records do not contain all the information required on SESAME, you will need to return to the records in SESAME once imported to complete the relevant fields. You will not be able to submit your profile until these records are complete. For this reason, we advise that you only import relevant records.

9. If you select a record that already exists on your profile, you will get a caution.
10. If you choose to import records that already exist on your profile, the import will overwrite some key fields with the values on ORCID. If you wish to re-import the records, click Proceed. Otherwise, click on Cancel and then uncheck any items you do not wish to reimport. Then click Import again.

11. If you have a publication on your ORCID ID that has a matching DOI on an existing transaction on your profile, you will see a “Yes” below the Publication Exists column. If you select one or more of these records and then click the Import button on the ORCID Import window, you will get an warning message to indicate that a transaction already exists with the same DOI.

12. If you click on Proceed, this will create a duplicate record on your profile. Please ensure to remove any duplicates prior to submission. Otherwise, click on Cancel and uncheck any items you do not wish to re-import. Then click Import again.

13. The checked records will be imported.

14. Save your profile to refresh the publication list.

Completing Imported Records

1. When records are imported from external sources, only certain fields imported, depending on the source data, so the record will be flagged as incomplete. Add any remaining data by clicking on Open and then click on Publication Type to select the type of publication the item is. Once the type is selected, the relevant fields will be displayed.
2. All mandatory fields should be completed. Click on Save.

**BibTex Parser**

1. Some ORCID records contain a bibtex citation of the publication fields which may contain more details of the publication than was directly imported from ORCID. This data is stored in the Citation field of the BibTex Parser section of the publication record.

2. To parse the bibtex citation into the existing record, click on Run. If the citation is not in BibTex format, the data will not be parsed.

3. When prompted “Are you sure you want to continue?” click on OK.