RIMS Publications Management Manual

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About RIMS

RIMS is a comprehensive web-based interactive system that will allow us to collect, validate, manage, and report on research and innovation activities of the SAMRC. It will encompass our management of publications by SAMRC staff and recipients of SAMRC funding, grant funding from our numerous funding streams, ethics applications, review and approvals, pre- and post-award management of grants that we receive, management of all contracts and agreements, as well as graduate student and intellectual property management.

In addition, integrations with internal systems and external resources will simplify data import and thus reduce the administrative burden. One of the many features of RIMS will be user-focused dashboards to provide researchers and staff with a clear overview of their data, focused to-do lists of tasks at hand, and the ability to build profiles highlighting accomplishments, outputs, and impact.

Module 1: Login and dashboard

Lesson time: 30 Minutes Lesson
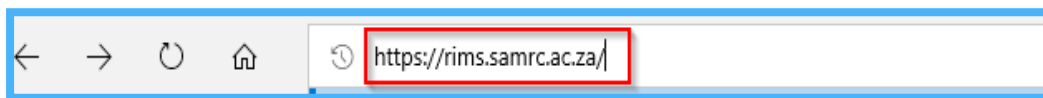
Objectives:

In this lesson, you will

- ✓ Login to RIMS
- ✓ Learn how to switch roles
- ✓ Understand the dashboard

Logging into RIMS

1. Enter the URL of the RIMS environment in your browser.

   Live/Production environment URL: https://rims.samrc.ac.za

2.

   Click on login.

3. For SAMRC staff, enter your SAMRC network username and password on the **SAMRC account login** screen and click "Login".

   For instance, User name= apaul and Password= XXXXXXXX

4. For non-SAMRC staff, kindly click on external account login.

5. Enter the username and password provided by RIMS support and click "Login".
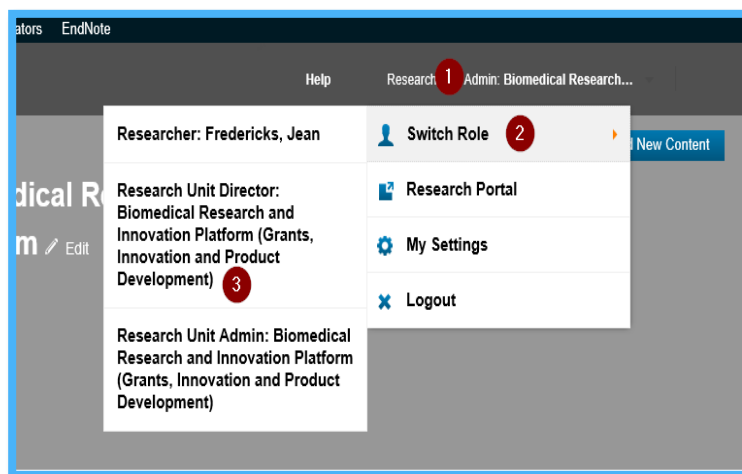

Expected Outcome:

- A user dashboard screen is displayed.
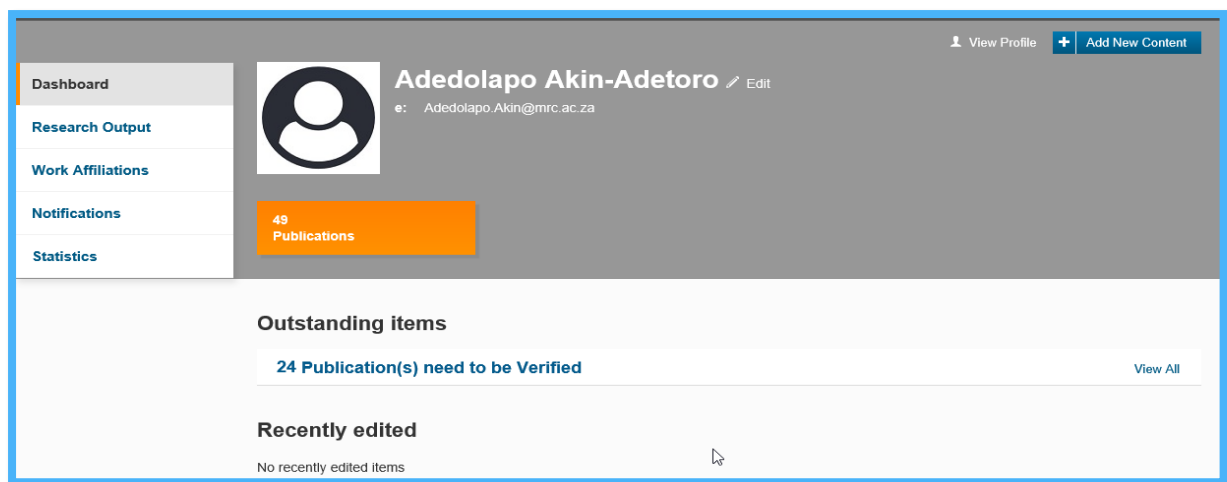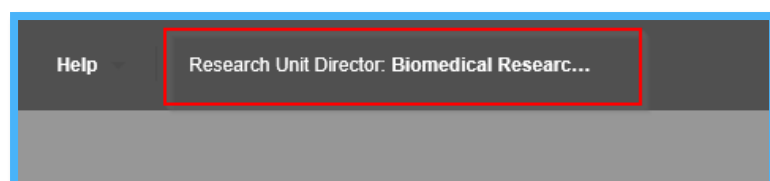
Switching Roles

This section outlines the steps required to switch roles.

1. Click on your name.
2. Click on "Switch Role".
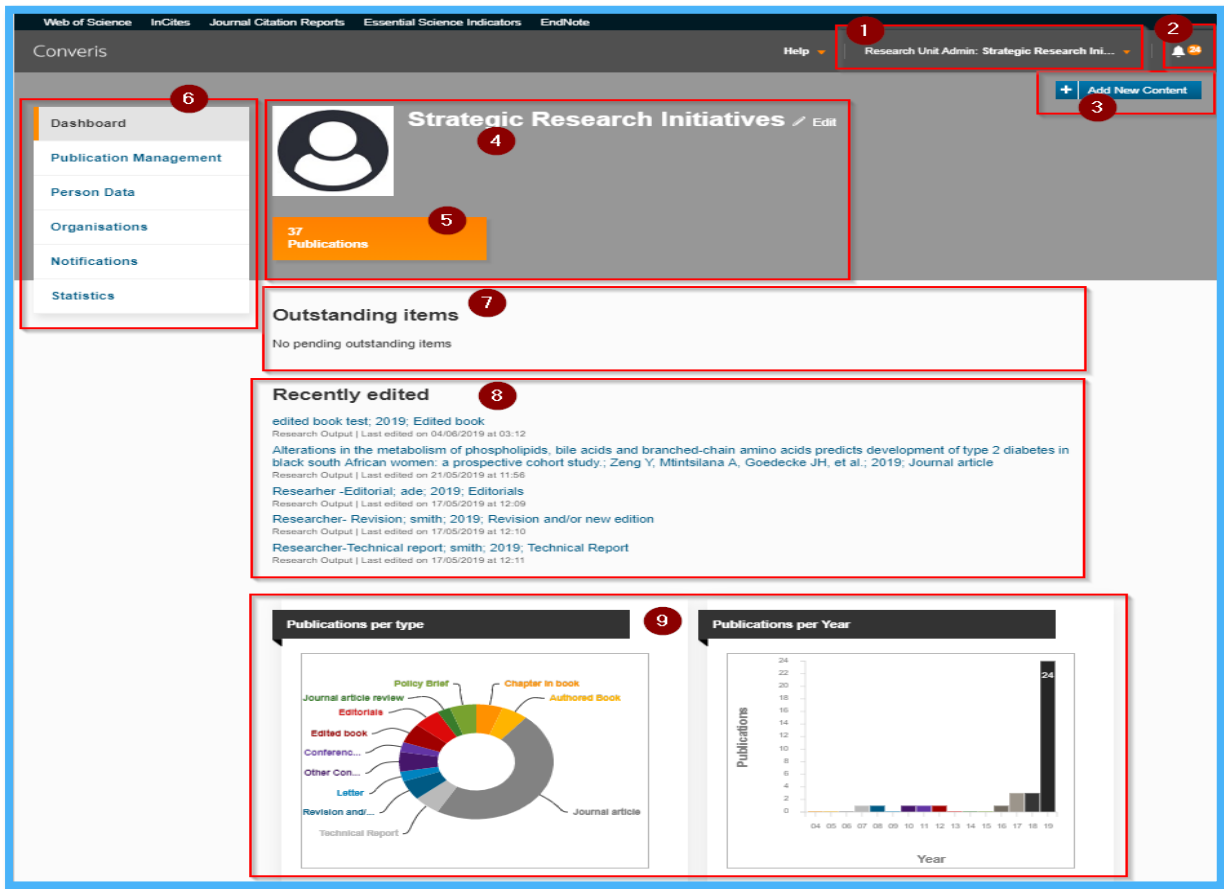3. Click on "Research Unit Director".

Expected Outcomes:

- A new screen is displayed, and the "Research Unit Director" role shows at the top right corner.

Understanding the dashboard

A description for each section of the dashboard is given below.

1. Your user role is displayed at the top the right-hand side of the screen next to the bell sign.

2. Your user notifications can be accessed by clicking the bell sign.

3. Below the user role, is the" (+) Add New Content" button which expands and gives an option to add new content to the system.

4. Your user role is related to the name of the unit/centre/division displayed.

5. The total number of publications related to your unit/centre/division is displayed.

6. The left menu bar provides access to created contents (i.e. publication records) on the system.

7. Publication records that require action are displayed.

8. Recently edited records are displayed.

9. Publication statistics.

Module 2: Reviewing and approving research outputs

Lesson time: 40 Minutes

Objectives:

In this lesson, you will

✓ Review and approve research outputs individually and in bulk.

Reviewing and approving research outputs individually

This section outlines the steps required to review and approve research outputs individually.

1. On the Dashboard, under the Outstanding items section, kindly click on "Publications(s) waiting to be approved".
2. Click on the relevant publication that you would like to review and approve.

3. Review and fill in all in required fields if necessary.
4. If you are happy with all the information captured, click "Save & Close".
5. Select "Status – Approved and Sent to KIMS" to send the publication forward to the KIMS (Knowledge and Information Management Services) for verification.
6. To reject the publication, select "Status – Returned for Clarification" to send the publication back to the publication capturer.
7. Type in the comment section to add a message.
8. Click "Done".

Expected Outcomes:

- The dashboard is displayed, and the number of "Publication(s) waiting to be Approved" is reduced.


Bulk approving research outputs

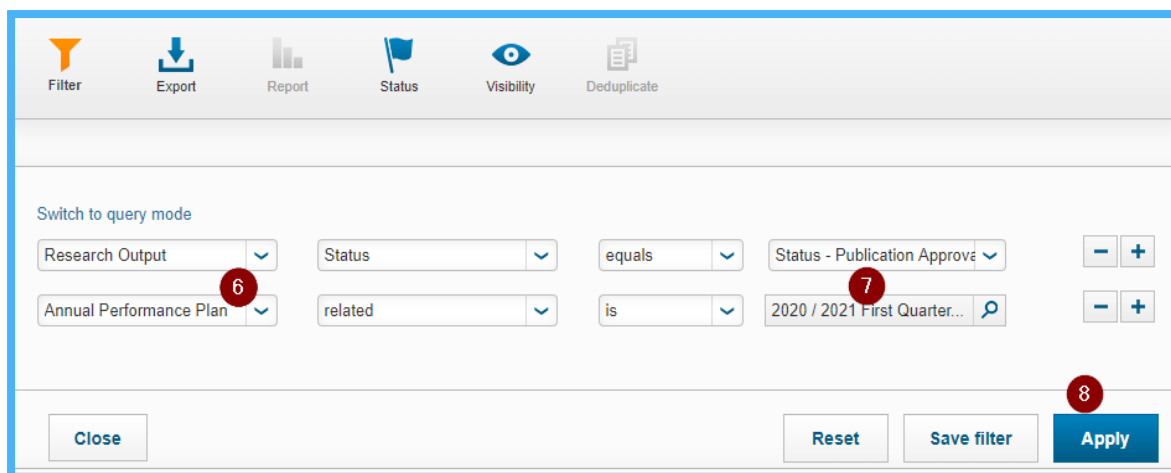This section outlines the steps required to approve research outputs in bulk.

1. Click on "Research Output" tab to display the list of all the publications that were captured for your unit.

2. Select the "Filter" tab and apply the following criteria:
3. Select "Status" from the second drop-down list.
4. Select "Status – Publication Approval by Research Unit Director" from the fourth drop-down list.
5. Click on the "+" button.
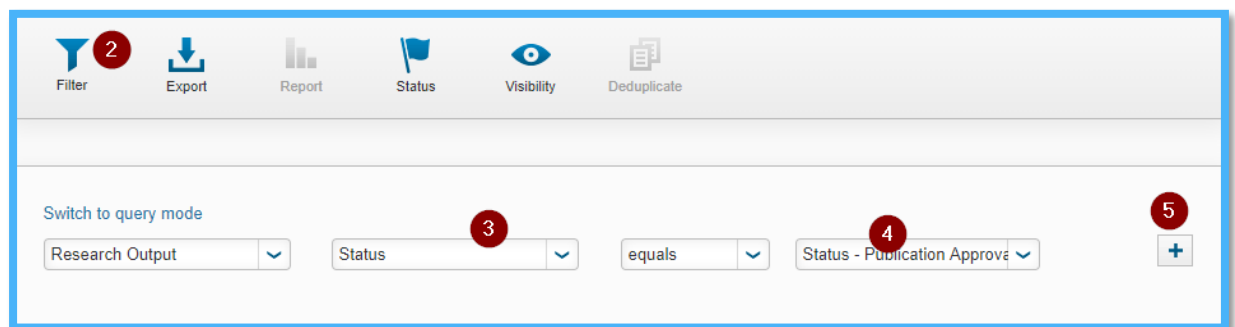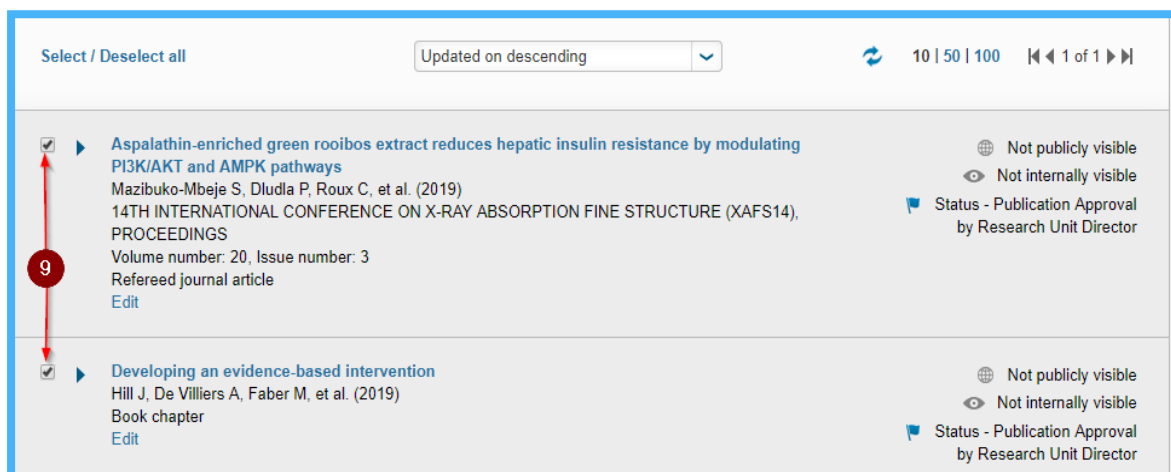
6. Select "Annual Performance Plan" from the drop-down list.
7. Search and select the relevant quarter.
8. Click "Apply".

Note: To reuse this filter, kindly click on "save filter" and enter a filter name.

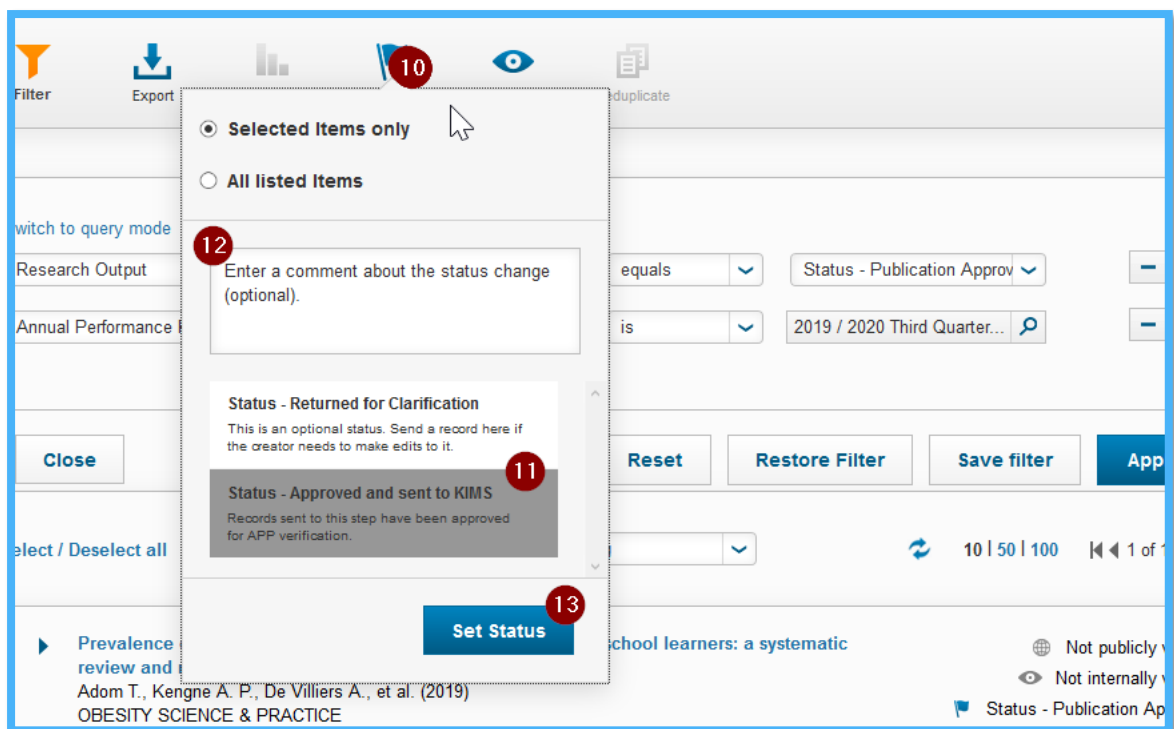9. Tick the boxes of all the research output that you would like to approve.

10. Return to top of the page and select "Status."
11. Select the "Status – Approved and sent to KIMS."
12. Type in the comment section to add a message (optional).
13. Click "Set Status". (This approves all the selected outputs simultaneously).

14. Click on "Apply" to confirm the bulk approval.
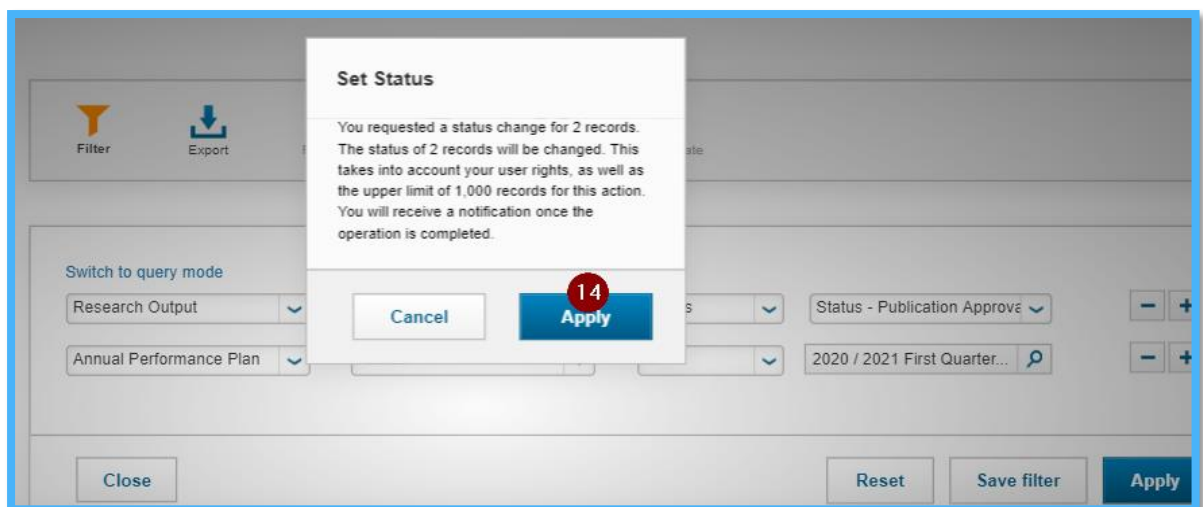
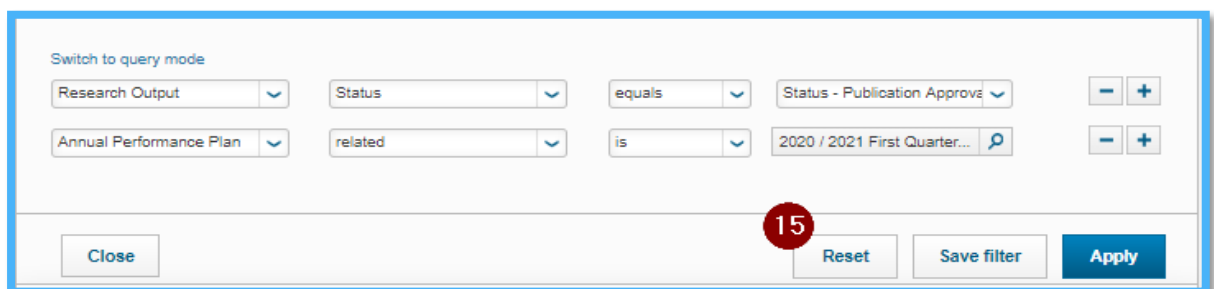
15. Click on "Reset" to clear the filter criteria.

Expected Outcomes:

- The approved publications appear first on the research output list-view with their status set to "Status-Approved and sent to KIMS".

Task 1: Reviewing and Approving Research Outputs

1. Go to rimstrain.samrc.ac.za
2. Click on login and sign on.
3. Switch your role to the "Research Unit Director".
4. Review and approve publications.

Module 3: Checking approved research outputs

Lesson time: 20 Minutes

Objectives:

In this lesson, you will

  ✓ use the filter function to display all the publications that you have approved for verification.

Steps

1. From the dashboard, click on "Publication Management" and then "Research Output" to list all the publications that were captured for your unit.
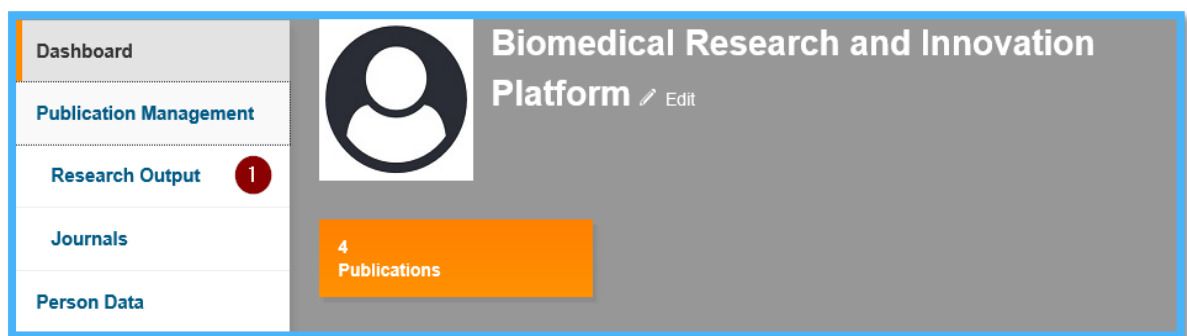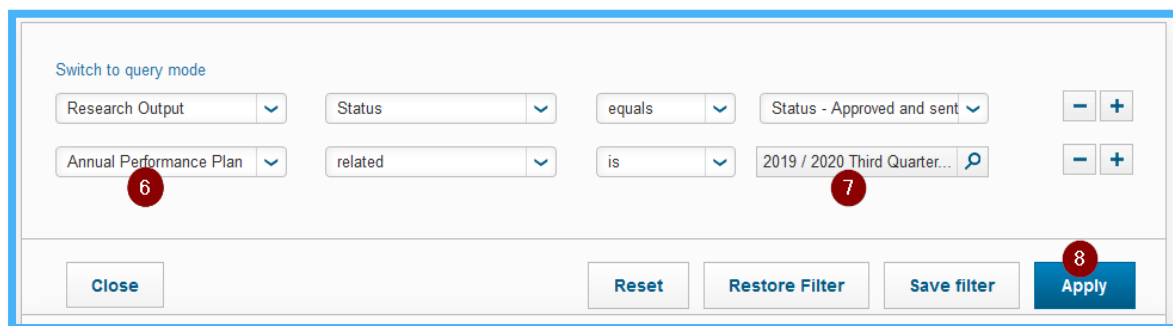
2. Select the "Filter" tab and apply the following criteria:
3. Select "Status" from the second drop-down list.
4. Select "Status – Approved and sent to KIMS" from the fourth drop-down list.
5. Click on the "+" button.
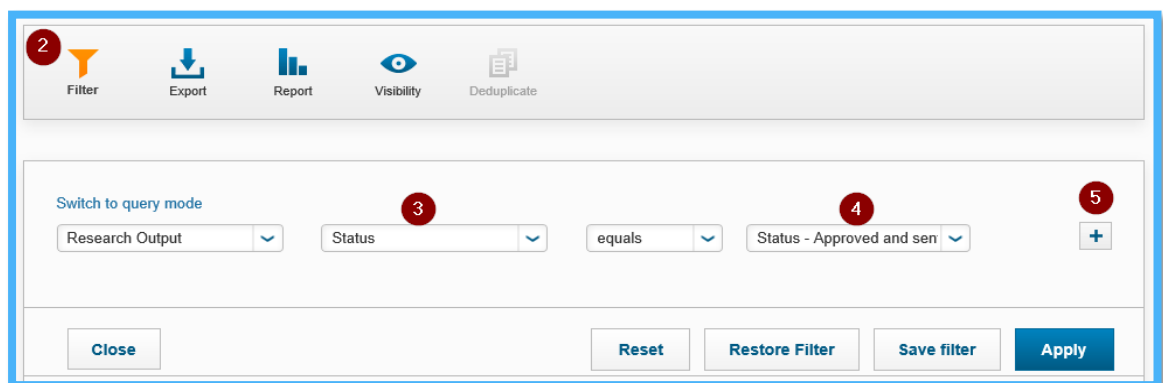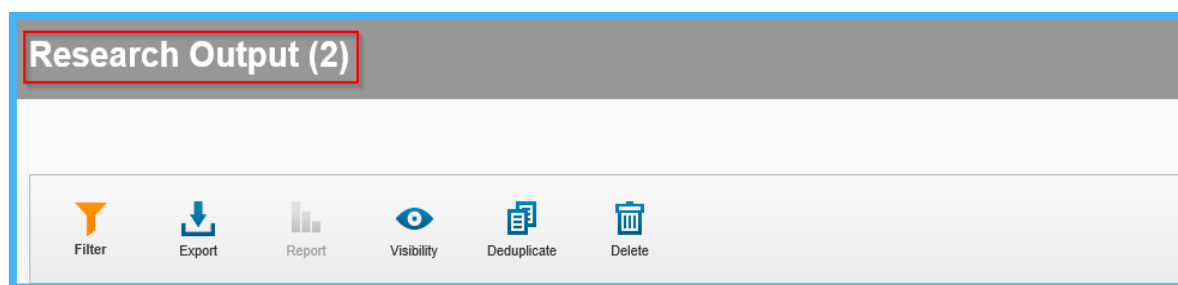
6. Select "Annual Performance Plan" from the drop-down list.

7. Search and select the relevant quarter.
8. Click "Apply".

Expected Outcomes:

- The number of publications submitted to KIMS for publication verification appears on top of the screen next to the heading "Research Output" in brackets.
- The status "Status –Approved and sent to KIMS" can also be seen next to the filtered publications.

Task 2: Checking research outputs that have been approved.

1. Go to rimstrain.samrc.ac.za (if you are logged out).
2. Click on login and sign-on (if you are logged out).
3. Switch your role to the "Research Unit Director" (if necessary).

4. Use the filter function to display all the publications that you have approved for verification.

Module 4: Exporting research output records

Lesson time: 20 Minutes Lesson

Objectives:

In this lesson, you will

- ✓ Learn how to use the exporting functionality

This section outlines the steps required to export information into a file (Excel, BibTex or EndNote).
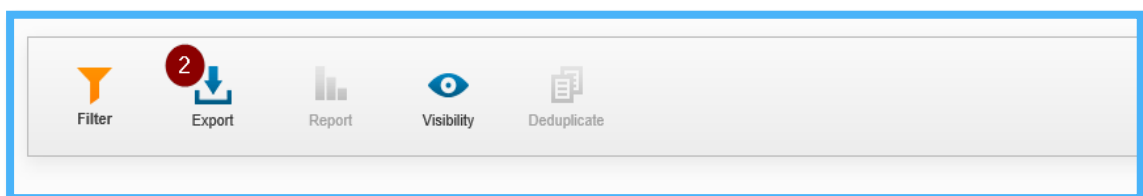
1. Please filter the publication records you would like to export (see module 3).
2. Click on the "Export" icon.

3. Please select which content you want to export: "Selected item" or "All (filtered) items" and then select whether you would want to use a template: "Custom export" or "Use template". (For details about these options, hover your mouse over the "?" symbol)
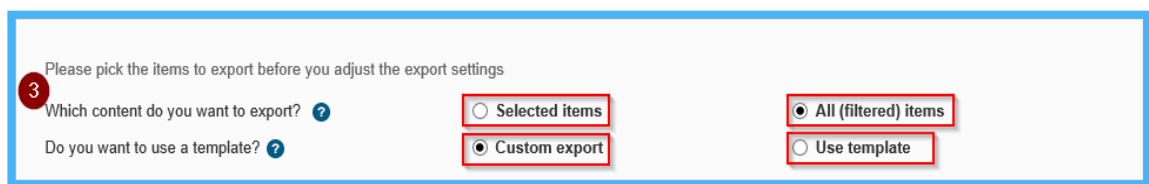
4. Under "Export Settings" please click on the "Export format" drop-down list and select "Microsoft Excel (*.xlsx).

5. Under "Exported Data", please select the fields that you would like in your report from the list of available attributes.
6. Click "Export".

Expected Outcomes:

- An excel spreadsheet will be generated with all the fields you selected.

FAQ and Logging Calls

Frequently Asked Questions (FAQ)

Kindly use the FAQ to check for solutions to common problems. If you cannot find help from this section, please feel free to log a call.

1. I am unable to login to RIMS.

   Answer: For SAMRC staff, ensure that you enter your SAMRC network user name and password (i.e. User name= apaul and Password= XXXXXXXX) on the **SAMRC account login** screen. For non SAMRC staff, kindly enter the user name and password provided by RIMS support on the **external account login** screen.

   If you are still unable to login, kindly log a call.

2. How do I add a missing person record to RIMS?
   Answer: kindly log a call.
3. How do I link a person record to another research unit/centre/division?
   Answer: kindly log a call.
4. How do I change the name of a person in RIMS?
   Answer: For an SAMRC person record, the change must be made on the SAMRC HR system. For an external person, kindly log a call.
5. How do I add a missing Journal to the System?
   Answer: Kindly find the steps on page 11 of the RIMS research output manual for research unit admins.

Logging Calls

For internal SAMRC users

1. Kindly log your call on the SAMRC IT Helpdesk.

For external users

1. Kindly send an email to **servicedesk@mrc.ac.za**

Terms and Acronyms

Glossary of Terms

Term	Description
Status - Draft	A publication record is created.
Status - Rejected	A publication record is rejected.
Status - Returned for Clarification	A publication record is returned to the Researcher/Research Unit Admin for clarification.

Status – Publication Review by Research Unit Admin	A publication record is sent for review by the Research Unit Admin.
Status - Publication Approval by Research Unit Director	A publication record is sent to the Research Unit Director for approval.
Status - Approved and sent to KIMS	A publication record is approved by the Research Unit Director and sent to the KIMS Admin for verification.
Status - Publication Review by KIMS director	A publication record is sent to the KIMS director for adjudication.
Status - Verified	A publication record is verified.
Status - Validated	A publication record has been audited and is visible on the research portal
RIMS	Research Innovation and Management System.
KIMS	Knowledge and Information Management Services.