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<th>Version</th>
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<td>0.1 - Alpha</td>
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<td>Suzanne Bell</td>
<td>2/15/2008</td>
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1 Document Description

This document describes the general functionality available to users of the IR+ system. This document assumes the system has already been installed and is ready for use, and administration for basic system setup has been performed. If you need to install the system please see the IR+ installation manual. This manual does not cover administration as that is covered in the “IR+ Administration Manual.”

1.1 Project Web Site

If interested, you can visit the project web site on Google code at the following URL:

http://code.google.com/p/irplus/

The source code can be downloaded from this location, as well as finding out more about the project.

1.2 Project Group

The project also has a corresponding Google group at
1.3 Suggestions

Please feel free to submit comments and suggestions for how this documentation can be improved.
2 Home Page
Welcome to IR+. Your home page should look similar to the one below (not including the arrows and numbers).

(Image continued on next page)
Here is a description of the numbered items:

1. **Site logo** – also a link that always takes a user to the home page. This site has been customized for the University of Rochester.
2. **Menu Bar** – link to home page, login, and create account options. Upon logging in more options may be available based on permissions.
3. **Browse/Search Module** – allows you to search the IR+ publications.
4. **Institutional Collections Module** – Top level set of institutional collections with thumbnails of their logos.
5. **Links** – to general information including help, contacting us, about IR+, privacy policy.
6. **Login** – allows a user to log in.
7. **Create Account** – allows a user create a new account.
8. **News Module** – news that may be important to you as a user: for example maintenance dates, or scheduled down time. *(Note: news is only shown when there are news items to read.)*
9. **Pictures Module** – pictures/logos that can be uploaded for display; may show a different image each time the page is visited if there is more than one image. *(Note: only shown if images are available for viewing.)*
10. **Researchers Module** – features different Researcher Pages each time the page is visited; also provides access to browse all Researchers. *(Note: only shown if researcher pages have been created for viewing.)*
11. **Statistics Module** – shows statistical information about the repository.
12. **Statistics Link** – shows more in-depth statistical information about the repository.
3  Browsing and searching

3.1  Browsing/Searching All Publications

Generally you do not need to create an account to view most of the information within the institutional repository. Creating an account may allow you to have certain benefits depending on polices set up for the repository. Some possible benefits include:

- Subscribe to collections
- An authoring and collaboration workspace
- Researcher Page
- Publishing into the repository

This section will cover abilities an anonymous user would generally have.

Selecting the Browse All/Search option (1) will allow you to view a listing of all records within the repository:

This will bring you to a screen like the following:
The following is a list of the numbered items:

1. Tabs for browsing options
   a. Browse Publications – browse publications within the repository
   b. Search – search the repository for information
   c. Browse Authors/Contributors – browse a listing of all contributors within the system
   d. Browse Sponsors – browse the list of sponsors

2. Filter by a particular content type

3. Current location and total number of items being viewed

4. Listing of publications
   a. Thumbnail if one exists
   b. Name of the publication
   c. Publication Date – date of publication if published
d. First Public Date – date the publication was first made public
e. Listing of contributors

5. Limit by letters
6. Pagination bar

Selecting the search tab will bring you to a search screen like the following:

Executing a search, for example: “Science” will bring up a result screen like the following:
The following is a list of the numbered items:

1. Current Search executed
2. List of possible facets to narrow the search
3. Current viewing location and total number of items found
4. Pagination bar
5. List of current publications to browse
   a. Thumbnail if one exists
   b. Name of the publication
   c. List of contributors for the publication

Selecting the Browse Authors/Contributors will bring you to a screen like the following:

The following is a list of the numbered items:

1. List of Author/Contributor names sorted in ascending order (selecting the hyperlinked “Name” column title will sort by last name, first name descending)
2. Filter the names by first letter of last name
3. **Pagination bar**

Selecting the Browse Sponsors tab will bring you to a screen like the following:

The following is a list of the numbered items:

1. List of sponsor names (selecting the hyperlinked “Name” column title will sort by last name, first name descending)
2. Filter the names by first letter of sponsor name
3. Pagination bar

### 3.2 Browsing a record

Selecting a record in the publication browse or in other areas, for example, on a contributor page (see section: 3.3) would generally show a screen like the following:
The following is a list of the numbered items:

1. Current location of the publication
2. Title of the publication
3. Handle persistent identifier for the publication (Note: not always available depending on setup)
4. List of files for the publication
5. Metadata for the item
6. List of all versions of the publication
7. Number of downloads for the file
8. Contributors for the publication including contribution type (Composer/Arranger/Thesis Advisor/Author/etc.). Selecting the link takes the user to the contributor page – see section 3.3
9. Link to the Sponsor Page (See section 3.4).
3.3 Contributor Pages

Contributor pages allow a user to see all publications for a given contributor. Selecting a contributor name either on a publication, browse by contributor or browse by publication will take you to a screen like the following:

The following is a list of the numbered items:

1. RSS feed for the contributor (get an alert when person adds new material)
2. Picture of the contributor if they have a researcher page
3. List of publications produced by the contributor – the following information is shown:
   a. Title of the publication (Sort by selecting the column name)
   b. Date submitted to the repository (Sort by selecting the column name)
3.4 Sponsor Pages

Sponsor pages allow a user to see all publications sponsored by a given granting agency. Selecting a sponsor name either on a publication or the browse by sponsor page will take you to a screen like the following:

<table>
<thead>
<tr>
<th>Title</th>
<th>Submission Date</th>
<th>Version</th>
<th>Total Downloads</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;Diveniament&quot; z&quot; pervi æstiy, op. 83, Soch. P. Châteauxkago, Perechozenie dla 2 f. v 4 rub.</td>
<td>Apr 26, 2010</td>
<td>1</td>
<td>696</td>
</tr>
<tr>
<td>&quot;Interradica&quot; izskrenst pastushk iz sopry Pikowaj dama, sach. P. Châteauxkago: [Perechozenie] dla 2 f. v 4 rub.</td>
<td>Apr 26, 2010</td>
<td>1</td>
<td>127</td>
</tr>
<tr>
<td>1a [i.e. prima] sonata in M minor per violino e pianoforte, 2 morceaux caractéristiques pour violoncelle et piano par D. Popper, 2e Symphonie, en la, Op. 54 par Ch. M. Widor. [4 4 mains par A. Bentfeld]</td>
<td>Aug 6, 2010</td>
<td>1</td>
<td>316</td>
</tr>
<tr>
<td>4ème concertino (D majeur) pour piano avec accompagnement d’orchestre, Op. 76, Arrangement pour deux pianos par Richard Kleinmichel.</td>
<td>Apr 26, 2010</td>
<td>1</td>
<td>81</td>
</tr>
<tr>
<td>4ème concerto pour piano, op. 44 / Gabriel Fauré.</td>
<td>Aug 10, 2000</td>
<td>1</td>
<td>203</td>
</tr>
<tr>
<td>Symphonie III, Es dur zu 8 Händen bearbeitet von Théodor Kirchner, Op. 97</td>
<td>May 5, 2000</td>
<td>1</td>
<td>134</td>
</tr>
<tr>
<td>Symphonie III, Es dur zu 8 Händen bearbeitet von Théodor Kirchner, Op. 97</td>
<td>May 5, 2000</td>
<td>1</td>
<td>134</td>
</tr>
<tr>
<td>[Itayanski tanka iz op. Rusalka, Perelishe dla 2 forestan y 4 rubi A. N. Sheiber].</td>
<td>Apr 26, 2010</td>
<td>1</td>
<td>83</td>
</tr>
<tr>
<td>Art et cérémonie par Henry Eccles, 4er. pour violon avec piano par Gidal Salisale.</td>
<td>May 26, 2010</td>
<td>1</td>
<td>90</td>
</tr>
<tr>
<td>Andante symphonique pour violoncelle avec accompagnement d’orchestre de piano, op. 18. Edition pour violoncelle et piano.</td>
<td>Jun 1, 2010</td>
<td>1</td>
<td>73</td>
</tr>
</tbody>
</table>
The following is a list of the numbered items:

1. Name of the sponsor
2. List of publications supported by grants from this sponsor
3. Most recent submission to the repository funded by the sponsor
4. Most Downloaded publication funded by the sponsor
5. Total publications sponsored and total downloads
6. Pagination

3.5 Researcher Pages

Researcher pages allow members of the institutional repository to highlight and display their work. This can include work currently in progress as well as pointing to information inside or outside of the repository. Researchers are randomly shown on the home page each time a user visits the repository web site, as shown below:
The following is a list of the numbered items:

1. Ability to browse all/search researcher pages
2. Link to a given researcher page and a short description of the researcher
3. Option to cycle through the available researcher pages.

Selecting the name of a researcher should take you to a page like the following:

The following is a list of the numbered items:

1. Images uploaded by the researcher
2. Link to all work created by the researcher in the repository
3. Researcher general information
4. Listing of research information provided by the researcher (both inside and external to the repository)
3.6 Repository Statistics

Statistics for the system can be seen in many different locations:

- Contributor Pages (Total number of publications/Downloads Per Publication/Total downloads for the researcher/Most Downloaded Publication)
- Sponsor Pages (Total number of publications/Downloads Per Publication/Total downloads for the researcher/Most Downloaded Publication)
- Publication Page (Total number of downloads per file)
- Home Page Statistics module (Total number of collections / Number of Publications / Number of File Downloads / Number of Members)
- Collection Page (Total number of collections / Number of Publications / Number of File Downloads)
- View all collection Statistics (similar to view all repository statistics)
- View All repository Statistics (shown below)
This allows a user to see basic repository statistics.

### 3.7 Repository Collections

The collection is how publications are organized within the repository. Selecting a collection on the home page will take you to a page like the following:
The following is a list of the numbered items:

1. Current location in the repository (collections can have sub collections)
2. Search this collection (searches within the collection and sub collections) – Browse all search will be similar to the repository browse all search link but will only contain information specific to this collection and all sub collections.
3. Information about the collection
4. List of sub collections
5. Way to subscribe via email or RSS feed (to receive alerts when new material is added)
6. Images for the collection
7. Statistics for the collection

4 Creating an Account

Selecting the Create Account option (1) will take you to the following screen:
Please enter the following information to create an account.

- First Name *
- Last Name *
- User Name *
- Password (At least 6 characters) *
- Retype Password *
- E-mail *
- Phone Number:
- University Affiliation:
- Department(s):

(continued on next page)
The following is a description of the numbered items:

1. Create account option
2. General user information
3. License for submissions into the system

Enter your information. Create a password that you feel is secure. Select an affiliation and department that makes the most sense for you. (If your department is not listed, let the site administrator know so s/he can add it.) Some affiliations may need approval by an administrator to confirm the affiliation is correct; however, this will not prevent you from getting an account.

Once you are done entering the information, click “Create Account.” This should result in the following screen:
To complete the registration process, check your email - you should get an email like the following:

Dear ndsarr,

Your account has been successfully created.

Please click on the link below to login and complete the registration process.  
http://localhost:8080/ir_plus/user/emailVeriﬁcation.action?token=0.2696131070721788

Follow or copy and paste the link into your browser. This should take you to the login screen – enter your user name and password and select the “Login” button (as shown below).

1. User Name – user name entered when account was created, or user name associated with other authentication system (such as NetID).
2. Password – local password or Net ID password based on account you want to use.
3. Login / Reset buttons for resetting the form.
4. “Forgot password?” link to allow you to reset your password, and Create New Account link to allow you to create a new account. Selecting Forgot Password lets you enter your user name and an email will be sent to your default address. Selecting Create New Account allows you to create a new basic account in the system (same as 11 in the first image).

Once logged in you should see a screen like the following:

Note: Each time you add a new email to your account, you must verify that email.

You may also get another email like the following depending on the type of affiliation you chose when you created your account:

Dear ndsarr,

Your affiliation - "Faculty" is being verified. You will be notified by email when the verification process is complete. Until then your account will have limited functionality.

4.1 User Account Types

You may be given one of several types of accounts:

1. Basic user: This means you can log in and may be assigned to groups with special permissions. This is the most basic type of account. You do not have any authoring capabilities and cannot create a Researcher Page.
2. Collaborating User: You can work on documents shared with you but you cannot start new documents on your own.
3. Authoring User: You can start authoring works, share and collaborate on documents with other users and publish to collections to which you have been given rights.
4. Researcher: You can do everything an authoring user can do as well as create a Researcher Page.
5. Collection Administrator: You have authoring abilities as well as the ability to manage specified collections and the items within them.
6. Administrator: Full control over the entire system.
5 Managing Account Information

Applies to: Basic User, Collaborating User, Authoring User, Researcher, Collection Administrator, Administrator

To manage account information once you have logged in, go to **My Account: [Your User Name]** as shown below (1).

![My Account Screen](image)

This will bring you to the following screen:
The following is a description of the numbered items:

1. Tabs to manage account information:
   a. User Information – basic user information (currently selected).
   b. Emails – set of emails this user uses. Multiple emails are generally only used for authoring / collaborating users.
   c. Subscriptions – list of collections to which you subscribe (e.g., receive email notification when new materials are added).
   d. Publication Names – names under which this user publishes. This is only used for users who publish into the system.
   e. Accepted Repository Licenses – licenses you have agreed to.

2. Change password option
3. Form to manage First Name, Last Name, Phone Number and Departments (Control + click to select multiple departments).

5.1 Changing password

To change your password, select the change password button. This should bring up the following screen:

Enter the new password and confirm new password. Click the Submit button.
5.2 Managing Your Emails

Today many users have multiple emails. The system allows you to tie multiple emails to a single account. Each new email address you add must go through a verification process. The default email cannot be changed until the new email has been verified. This prevents the incorrect assignment of email addresses within the system.

The following is a screen shot of the Emails tab:

The following is a description of the numbered items:

1. Button to manage emails:
   a. New Email – Allows you to enter a new email to associate with your account.

2. List of emails for the current account:
   a. Id – database ID (for administration purposes only).
   b. Email – email address
      i. Default Email – indicates all emails sent from the system will be sent to this account.
   c. Status - the status of the email
      i. Verified – means the email has been verified by the system.
      ii. Pending – means the system is waiting for you to follow a link provided in an email, to verify that address in the system.
   d. Actions – actions that can be performed on the email. No Actions can be performed on the default email address.
5.2.1 Adding a new email

To add a new email, select the new email button. The following screen will appear:

Enter the new email and click Submit. You should see a screen like the following:
Clicking ok brings you back to the screen. **Notice the new email says Pending Verification.** You should receive an email similar to the following:

Dear natesarr,

Please verify your email address by clicking on the link below and logging into the website.  
http://localhost:8080/ir_plus/user/emailverification.action?token=0.9453363426521583

By following the address, you will be asked to log in if not already. Once logged in you will see the following verification:

The email address - nathans@library.rochester.edu is verified.

Going back to your account, you should see both emails as verified (shown below):
The following is a description of the numbered items:

1. A verified **non-default** email can be set as the default email or deleted.

### 5.3 Subscriptions

The subscriptions area lists all collections you are currently subscribed to. You will receive emails when new material is added to any of the collections you have subscribed to.

You can unsubscribe from a collection by selecting the unsubscribe option (1).

### 5.4 Managing Publication Names

The Publication Names tab is for the names you wish to publish under. By adding a name here, it allows you to simply select the name when publishing (rather than typing it in every time). You can also add names during the publishing process. Names will only be needed by users who will be publishing. The following is a screen shot of the Publication Names tab:
The following is a description of the numbered items:

1. Buttons to manage names:
   a. New Name – create a new name.
   b. Delete Name – delete selected names.
2. List of names for the current user.

5.4.1 Adding a Publication Name

To add a name under which you will publish, select the new name button

Enter the information and click Submit. The Authoritative name checkbox allows you to set a name as your “authoritative” name. This allows the system to associate one primary name with your account, while also allowing you to publish under multiple names (e.g., just initials and last name) if needed.

5.5 Accepted Repository Submission Licenses
This area allows you to see the licenses you have accepted when submitting to collections within the repository.

<table>
<thead>
<tr>
<th>License Id</th>
<th>Name</th>
<th>Text</th>
<th>Date Accepted</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>NON-EXCLUSIVE DISTRIBUTION LICENSE</td>
<td>In order for the Institutional Repository to reproduce, translate and distribute your submission(s), your agreement to the following terms is necessary. Please read the terms of this license carefully and click on the “I agree” or “I disagree” buttons at the bottom of the screen accordingly. This agreement will apply to all of your submissions to the Institutional Repository. By agreeing and submitting this license, you (the author(s) or copyright owner) grant to the University of Rochester the perpetual, non-exclusive, royalty-free right to reproduce, translate (as defined below), and distribute your submissions (including the abstract) in print and electronic format and in any medium. You agree that the University of Rochester may, without changing the content, translate the submission to any medium or format for the purposes of preservation. You also agree that the University of Rochester may keep more than one copy of this submission for purposes of security, back-up and preservation. You represent that any submissions are your original work and that you have the right to grant the rights contained in this license. You also represent that your submissions do not, to the best of your knowledge, infringe upon anyone’s copyright or other property rights. IF ANY SUBMISSION CONTAINS MATERIAL FOR WHICH YOU DO NOT HOLD THE COPYRIGHT, YOU REPRESENT THAT, BEFORE SUBMISSION YOU WILL HAVE OBTAINED THE UNRESTRICTED PERMISSION OF THE COPYRIGHT OWNER TO GRANT THE UNIVERSITY OF ROCHESTER THE RIGHTS GRANTED BY THIS LICENSE, AND THAT SUCH THIRD-PARTY OWNER MATERIAL IS CLEARLY IDENTIFIED AND ACKNOWLEDGED WITHIN THE TEXT OR CONTENT OF THE SUBMISSION. IF ANY SUBMISSION IS BASED UPON WORK THAT HAS BEEN SPONSORED OR SUPPORTED BY AN AGENCY OR ORGANIZATION OTHER THAN THE UNIVERSITY OF ROCHESTER, YOU REPRESENT THAT, BEFORE SUBMISSION YOU WILL HAVE FULFILLED ANY RIGHTS OR REVIEW OR OTHER OBLIGATIONS REQUIRED BY SUCH CONTRACT OR AGREEMENT. The University of Rochester will clearly identify your name(s) as the author(s) or owner(s) of your submission(s), and will not make any alterations, other than as allowed by this license, to your submission. The use of this system is subject to the University of Rochester IT Policy which can be found at the following URL: <a href="http://www.rochester.edu/itpolicy/">http://www.rochester.edu/itpolicy/</a></td>
<td>2009.11.05 13:32 11.777</td>
</tr>
</tbody>
</table>

6  Workspace – File and Folder Management

Applies to: Collaborating User, Authoring User, Researcher, Collection Administrator, Administrator.

The workspace is where you can author, co-author and publish your work into the system. All users except for basic users will be taken to this area when they log in.
Description of numbered items:

1. Tabs for managing workspace information
   a. My Files (currently selected) – lists all of the files and folders in your workspace.
   b. My Publications – area to store and manage publications that have been published or that you are getting ready to publish.
   c. Search My Workspace – full text search for files, folders and publications within the workspace.
   d. Shared File Inbox – inbox where files are first stored when users share files with you.

2. Path – current path (directory structure) you are in.
3. **Workspace buttons:**
   a. New Folder – create a new folder in the current path.
   b. Add File – upload a single file to the current path.
   c. Add Files – upload multiple files at once.
   d. Move – move the selected files and folders.
   e. Delete – delete the selected files and folders including all files within the folders.
   f. Share – share the selected files and all files within selected folders.
   g. Publish – take a file or set of files from your workspace and officially add it to one or more collection(s) in the repository.

4. List of all files and folders within the path current path (see #2).
5. File System Size – amount of space you are using in the system.

### 6.1 Adding a Folder

Folders are a way to organize your files. To create a folder, simply click “New Folder” and name it.

![Workspace Screen with New Folder Option](image)

Clicking Submit should produce the following:
The following is a description of the numbered items:

1. Check box to select files and folders to be acted on.
2. Button (dropdown) with options for actions to take on the folder:
   a. Delete – delete the folder.
   b. Share – share all files within the folder and children folders.
   c. Edit – edit the name and description of the folder.
3. Name of folder – clicking on the name will open/navigate into the folder.
4. Will bring you to a screen showing the properties of the folder.
5. Auto Share – allows users to set the folder to auto share files when a file is added to the folder

By selecting the folder name you will navigate into the folder. For example selecting the “Work” folder, the screen will look like the following:

Here you can add more files or folders as needed. (NOTE: see next section for adding files)
6.2 Adding a File

To add a file click the add file button. You should see a screen like the following:

The following is a list of the fields:

1. File – file to upload to the system:
   a. Use the Browse button to find the file on your local system.
2. File Description – description of the file, such as “AAAI 2010 paper.” This is optional.

To find the file you want to upload, click the **Browse button**. You should see a screen like the following:
Navigate on your local system to the file you would like to upload. Once you select the file, click the Open button.

The following shows a file I have selected to upload:
Clicking the Submit button will upload the file to the current path. Once the file is uploaded you will see it in your workspace, as pictured below:

1. Checkbox to select the file – this will allow you to perform actions using the **workspace buttons** on one or more files and folders.
2. Dropdown for menu options for the file – to activate left click on the button (shown below):
   a. Download
   b. Edit Name/Description
   c. Lock & Edit
   d. Add New Version
   e. Share
   f. Publish
   g. Move
   h. Delete
   i. Properties


4. File Size – size of the most recent version.

5. Properties – link to view properties of the file, including a list of all versions and users with whom the file has been shared.

6. Share – options to share the file for collaboration.

7. Owner – owner of the file.

6.3 Editing a file

To edit a file the best practice is to select the Lock & Edit option for that file:
Click the dropdown arrow next to the file and select Lock & Edit. This will bring up the following screen (Note: different browsers will be slightly different):

(IE 8 shown below)
The following is a list of the numbered items:

1. Option to download the file. Here you can save the file to your local file system. **(NOTE – make sure you select the Save File option and save it to your local computer for editing.)**
2. Lock icon – when a file is locked, the lock icon is shown, and who has locked the file is displayed below the file.

You can now edit the file on your local file system. When you are finished editing, you will want to upload the file back to the system, as described in the next step, Adding a new version of a file.

### 6.4 Adding a new version of a file

To add a new version to a file, click the dropdown and select the Add New Version option as shown below:

You will be presented with a window like the following:
Select the file you wish to upload using the Browse option (see section 6.2 Adding a file if you do not know how to upload a file).

1. Option to keep the file locked for editing. If you wish to store the file in its current state to work on later, select this option. This will keep the file locked for editing. This option would mainly apply to a file you are collaborating on with another person, to prevent them from editing it before you are ready.

Once you have browsed to the new version click Submit. You should see the following:
Notice (1) – The version number has changed. There are now two versions of the file. The file is also now unlocked as the keep locked option was NOT selected. Note also that there is no need to change the name of the file; the system automatically keeps a distinct version each time you “Add new version.”

6.5 View versions and properties of a file

To view all the versions and properties of the file click the properties link (1) in the table, or select the Properties option (2) in the file dropdown as shown below:

This will show the following page:
The following is a list of the numbered arrows:

1. Virtual location of the file.
2. Current version data:
   a. Editing status (Locked/Unlocked)
   b. Name – name of the file.
   c. Version – most recent version number.
   d. Creation date – date the current version was created.
   e. File Owner – owner of the file.
   f. Size – uploaded version size.
   g. Size on Disk – sometimes the file size can be different.
   h. Path – Path to file in repository (Administration use only).
   i. File Information Id – ID for this file information in the database (Administration use only).
   j. Checksum – checksum for the most recent version of the file.
3. Buttons to manage the current file:
   a. Add new version - add a new version to the current set of versions.
   b. Share – share the file with other users (see Collaboration section).
   c. Lock & Edit – lock the file for editing.
   d. Rename – rename the file.
e. Change owner – allows you to change the owner of the file. Ownership can only be changed to current collaborators of the file.

4. Sharing – list of users with whom the file is shared.
5. All file versions – selecting the file name will download that particular version.

6.6 Uploading More than One File At Once

Navigate to the folder where you wish the files to be uploaded. Here we will be uploading them to the root location.

1. Click the Add Files button shown below as (1):

This should bring you to a screen like the following:
The following is a list of the numbered arrows:

1. Buttons to manage uploading multiple files:
   a. Cancel – cancel the multiple file upload.
   b. Upload Files – upload all files entered.
   c. Add [N] more upload boxes. By entering a number and selecting the add button [N] more upload boxes will be created. The default is 1.

2. File information:
   a. Location of file on local file system.
   b. Optional description of the file.

3. Remove the current file from the list of files to upload.

4. Buttons to manage uploading multiple files:
   a. Cancel – cancel the multiple file upload.
   b. Upload Files – upload all files entered.
   c. Add another – adds another upload box.

Continuing the Add Files operation:

2. Select the **Add** button.
3. Browse to each of the files as shown in Section 5.2.
4. Click the **Upload Files** button – this will upload the files to the location you were in when you clicked the **Add Files** button.

6.7 **Deleting File(s) or Folder(s)**

You can use the dropdown next to each file and folder to remove one folder or file at a time. To remove multiple files and folders at once, check the box next to each of the files and folders you wish to delete as shown below:
Then click the delete button (2):

This should bring up a confirmation for the delete:

Selecting the **Yes** button will delete the selected files and folders. Selecting the **No** button will not delete the selected files and folders.

### 6.8 Moving Files and Folders

You may need to organize or reorganize your files. To do this you can move files and folders around. For example, the following shows two folders and three files:
Say we want to move the file “admin-help.pdf” and “Repository Work” into the “Work” Folder. First select the folder and file you wish to move as shown below (1):

Next select the Move button (2):
This will bring up a screen like the following:

The following is a list of the numbered items:

1. Cancel button – cancel the move.
2. List of files and folders to move.
3. Location in your workspace where the files and folders will be moved.
4. Move Button – executes the move to the specified location in (3).
5. Destination – files and folders marked in red are being moved.
6. Files and folders that have been selected for moving.

Select the hyperlinked folder named “Work” in the Destination (5) to navigate into the folder. The screen will look something like below:
Selecting the **Move** button will place the files in the path shown in the “Move To Location,” and take you to the location where the files and folders were moved as shown below:

![Workspace for: Nathan Sarr](image)

<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
<th>Version</th>
<th>File Size</th>
<th>Properties</th>
<th>Share</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Repository Work</td>
<td></td>
<td></td>
<td>properties</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>admin-help.pdf</td>
<td>2</td>
<td>4.14 MB</td>
<td>properties</td>
<td>shareable</td>
<td>ndsarr</td>
</tr>
</tbody>
</table>

File system size: 14.37 MB
7 Sharing, Collaboration and Co-Authoring

The system allows you to share files. You can share files with anyone (inside or outside your institution) including those who have not yet registered with the system and created an account (see section 4). You can do this in two ways. You can share a single file or folder at a time by clicking the dropdown for a file and selecting Share as shown below (1):

Or, you can select multiple files and folders at once using their checkboxes and selecting the Share button (2). By selecting a folder you will share all files within that folder, including files within subfolders, but this DOES NOT share the folder. Adding more files to the folder afterwards will not automatically share those files set up auto sharing see (Setting up a folder for Auto Sharing). The following demonstrates sharing files using the share workspace button:
(1) – Folder and file to be shared. Then select the share option (2).

This will take you to a screen like the following:
The following is a description of the numbered items:

1. **Back to Workspace** – allows you to return to your workspace.
2. **Email Address** – email address(es) of user(s) you wish to share with. **NOTE:** you can share with multiple users by separating each email address with a semicolon (;).
3. **Message** – message you want sent to user when sharing the file.
4. **Permissions you wish to give to the user you are sharing with:**
   a. The user can download the file. This allows the user to get a digital copy but not upload changes to the file.
b. The user can download, edit, and upload new versions. This allows users to add new versions and collaborate.

c. The user can download, edit, and upload new versions as well as share/unshare the file with other users and give those users permissions. This allows users with whom the file has been shared to share with other users, creating a chain of sharing.

5. The set of files you would like to share:
   a. Selecting the remove option next to the file will remove the file from this sharing invitation.

Below shows an example of preparing to share with two users:

After pressing the Invite User button, the screen looks like the following:
The following is a description of the numbered items:

1. List of users who have been invited to collaborate on a given document.
2. Unshare option – will remove the user from sharing the file.
3. Edit – allows the sharing permissions to be adjusted.
4. To be shared – indicates the user is not currently recognized as part of the system and will be invited to create an account, or update their account with the specified email.

7.1 Sharing with someone who does not yet have an account
If the person you wish to share with does not have an account, this is not a problem. As shown above, a note next to the shared users will state [to be shared] – see (4) in the picture above. Once the person has created an account, the [to be shared] note will be gone. Notice you can also UnShare the file.

The following shows the email a user who does not yet exist in the system will receive when they are invited to work on a document.

From Nathan Sarr - Invitation to collaborate on a document

**DO NOT REPLY TO THIS MESSAGE**

You have been invited to collaborate on the document(s) - 'admin-help, user-help'. Please click on the link below to register with the system:

http://localhost:8080/ir_plus/inviteLogin.action?token=0.2832755720371065

Following registration you will be able to access the shared document(s).

Following the link will take them to the following screen:

There are a couple of possible situations when a user has been sent a sharing invitation:
1. The user already has an account but the email you used is not registered with their account. By logging in the new email will be added to this user’s set of emails so it will be recognized by the system in the future.
2. The user has never created an account and must now create a new account. This will take them through the account creation process.

7.2 Receiving a Shared File

When a file has been shared with you, it will appear in your Shared File Inbox tab – see (1) below:

Once a file or files appears in your Shared File Inbox, you should move it/them into your workspace:

The following describes the numbered items:
1. **Buttons to manage moving:**
   a. Move the file(s) into the My Files area.
   b. Delete the file(s) – this allows you to reject the file(s).
2. List of files that have been shared with you.
3. Link to download the file if you wish to view the file.

To move the file(s):

1. select the check box next to the file(s)

2. Click the **Move To My Files** button. You should see a screen like the following:

The following is a list of the numbered items:

1. Cancel the move.
2. List of files to move from the shared inbox.
3. Move button.
4. Location the shared files will be moved to.

Since the user does not have any folders, the only location they can put the file is in the “root” directory, known as My Files. Once the shared file is moved the screen will look like the following:

Now N Sarr is sharing a file with admin. Notice that even though the files are 4.14 and 6.05 MB, this is not charged to N Sarr’s account (1) and the File System Size is still 0. This is because the owner owns all versions of the file.

7.3 Working on a shared File

When working on a shared file the user should lock the file as shown in Section 5.3. The other user will be able to see who is working on the file. From the previous example, if admin locked the file for editing, Nathan Sarr would see the following:
Notice the note that the file is locked and the lock icon is shown to all collaborators.

### 7.4 Adding a new version with collaborators

When you upload a new version you will see a screen like the following:

By checking the name of the collaborator and email will be automatically sent notifying the collaborator that a new version has been added. The description (2) will be placed in the body of the email letting the user know what has changed.
7.5 Setting up folder(s) for Auto-sharing

You can set up a folder for auto-sharing so that anytime a file is added to the folder the file is automatically shared with the specified collaborators. To do this, select the Auto Sharable option for the folder shown below (1):

This should take you to a screen like the following:
The following is a description of the numbered items:

1. If selected and this folder has any existing sub-folders or sub-folders with files the sharing will be cascaded down to all sub-folders and their files
2. List of emails to set the folder to auto share with
3. Message to send users if any of the folders or current folder contains files
4. Permissions to give the users when a file is added to the folder(s)
5. List of user who will be auto-shared with when a file is added to the folder

**Note:** No messages (3) will be sent out if there are currently no files in the folder(s).

Once a user has been shared the following information will be shown:
The following is a description of the numbered items:

1. The user currently exists in the system files added to the folder will be immediately shared with them.
2. The user has not yet created an account in the system once they do all files currently in the folder(s) will be shared.

By selecting the **Edit** option on an existing user set for auto-sharing you will be shown a screen like the following:
If apply changes to sub folders is checked every sub folder will be updated with the changes. If apply to changes to sub files is checked all files within sub folders will be updated with the new permissions.

Once a folder is auto shared when viewing the folder in the workspace it will look like the following:

(1) Shows the folder is being auto shared with 2 people. Any time a file is added to that folder users will be notified a file has been shared with them.
Moving files and folders into a folder set to auto share will look like the following:

When moving files into an auto shared folder by default apply auto share permissions is checked (1) meaning that all users set to auto share in the parent folder will have the files auto shared. Any folders added including sub-folders will receive the parent folder auto share permissions and all files within those folders will also be shared with any auto shared user in the parent folder.

If files and folders are moved out of an auto shared folder into a non-auto-shared folder there are no changes in permissions meaning all files and folders keep their existing share permissions and auto-share permissions.

7.6 Overriding a Lock

If for some reason an owner needs to get a file back in an emergency situation – say someone went on vacation and forgot to unlock the file – the owner can override a lock. This functionality should only be used in rare circumstances and is generally considered rude if done for no reason at all. Only an owner of the file can override a lock. The following shows how this is done:
Once the Override Lock option is selected, the lock is removed. Again, an owner can override a lock – it does not require an administrator.

7.7 Un-sharing and Changing Sharing Permissions

If for some reason you have made a mistake with the sharing on your files, you can change the sharing of a file.

To see if a file is being shared look at the share column (see 1). If the status is shared, the file is shared with one or more users.
To manage the sharing of a file, select the shared link (1). The following screen should appear:
Invite user

<table>
<thead>
<tr>
<th>User to share the file with</th>
<th>File(s) selected to share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email(s)</td>
<td>IR_Plus_Admin_Manual.doc</td>
</tr>
<tr>
<td>Message</td>
<td>Nathan Sarr (<a href="mailto:npsm@library.rochester.edu">npsm@library.rochester.edu</a>)</td>
</tr>
</tbody>
</table>

- The user can download the file but not upload new versions
- The user can download, edit and upload new versions
- The user can download, edit and upload new versions as well as share/unshare the file with other users and give those users permissions
The following is a list of the numbered items:

1. List of files being shared.
2. List of users who are sharing the file.

To unshare the file with the user, select the Unshare option. You will get a confirmation screen like the following:
Select Yes to unshare the file with the user or No to cancel.
To edit the sharing permissions a user currently has, select the Edit Link. You will see a screen like the following with the user’s current permissions shown:

![Edit Permissions Screen]

Make changes as necessary.

8 Publishing

Once you have finished working on a document, you may want to continue and publish the document into the repository. This is an optional step and is not required. To start the publishing process, select the file or files you wish to publish (1) and click the Publish button (2) as shown below:
NOTE: you do not need to select any files and files are not required in a publication. For example, if you only want to add link(s) to a publication.

NOTE: Only owners of a file can publish that file.

Once you click Publish, you should see a screen like the following to enter the name of the publication:

Enter the initial article (if any) and name of the publication and click Submit. This should bring you to a screen like the following:
The following is a description of the numbered items:

1. Name of the publication being created.
2. Current step in process.
3. Button to finish the publication process later.
4. Current location in your personal file system.
5. List of files and folders in your personal file system at the given location (see 4).
6. File that has already been added to the publication.
7. Option to add a link to the publication.
8. Next button to go to the next step.
9. Current list of files added to the publication.
10. Version number of the file to add.
11. Description of the file (optional).
12. Option to remove the file from the submission.

### 8.1 Adding files to a publication
You can navigate around your file system in the Add Files step of the publication, so if you forget to add a file, don’t worry. To navigate around your file system, use the Current Location links and/or the links listed under File System. For example, navigating into the “Extra Documentation” folder from the previous example shows the following screen:

Notice the path has changed and shows that we are in the “Extra Documentation” folder (1).

**Note (Not shown in example):** Selecting an add option next to a folder will add all files in that folder and its sub folders.

To add any individual files, click their “Add” links (2).

When there is more than one file in a publication, files can be moved up and down so they are listed in the order you want (3). You can also select the version of the file to add (4).

Shown below is an example of a publication with two files:
8.2 Adding a link to a publication

Sometimes you may want to add a link to a publication or you may want the publication to only contain a link. To add a link, click the Add New Link button on the “Add Files” screen. This should bring up a screen like the following (information has been added for example purposes):
Click the Submit button to save the link information.
The following is a description of the numbered items:

1. Link information.
2. Edit option for the link.

### 8.3 Adding Information to a Publication

The following screens show the information that can be added to a publication; there are four screen shots that show the entire form.

The following is a description of the numbered items (Unless otherwise noted **all items are optional** – do not be overwhelmed by length of the list; it simply represents the full spectrum of **possible** information you might want to include to describe your work):
1. Name of the publication (Required).
2. Current stage of the submission process.
3. Finish Later – will save the current state of the publication for finishing later.
4. List of files and links added to the publication. (NOTE: files can be opened allowing for the copy and pasting of file information into the fields or viewing information within the files. Links will open in a new browser window to prevent users from leaving the current submission process).
5. Title of the publication.
6. Adds another title box to the publication (for subtitles, translated titles, etc.).
7. Abstract.

The following is a description of the numbered items:

8. Description
9. Person who is submitting the publication (also referred to as the owner of the publication).
10. Primary Type – primary type of publication: for example is it a book, article, etc.
11. Secondary Types – if the publication can be classified as more than one type, select the secondary publication types for this publication (ctrl + left click to select multiple).
12. Add Existing Series – allows you to add another series name, if your publication is part of more than one series.

13. Create New Series – add a new series that does not yet exist in the system. This will add a new entry to the Series Name dropdown list.

14. Series Name – select a pre-existing series name from a dropdown list.

15. Report or Paper Number – report or paper number information for the publication.

16. Remove Series - remove the series name from this publication.

17. Add an existing identifier entry to the publication – adds another box to allow for more than one identifier (such as edition, ISBN, ISSN, etc.).

18. Create New Identifier Type – add a new identifier to the list of existing identifiers in the dropdown.
19. Dropdown list of identifiers.
20. Identifier value
21. Remove Identifier – remove the identifier from the item.
22. Add Existing Extent Type Entry – allows you to enter more than one type of extent, such as Page Size, Number of Pages, Length in Time, etc.
23. Create New Extent Type – allows you to create a new extent type to be displayed in the list of extent types.
24. Dropdown list of existing extent types.
25. Extent type information – for example, if you select the Time extent type you might enter: 35 minutes.
26. Remove Extent – remove the extent from the publication.
27. Dropdown list to select the language of the publication.
28. Copyright statement to allow the author to indicate copyright – or if needed a public domain statement can be added in the administration section.
29. Area to enter a list of semicolon (;) separated subject keywords.
30. Add Another Sponsor – creates another field to add more than one sponsor.
31. Create New Sponsor – allows you to add a sponsor to the dropdown list of sponsors.
32. Dropdown to select a sponsor.
33. Area to describe sponsor contribution or grant number.
34. Remove Sponsor – remove a sponsor from the item.

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>35</td>
<td>Date this publication was first presented to the public (MM/DD/YYYY)</td>
<td></td>
</tr>
<tr>
<td>36</td>
<td>Date this publication can be made available to the public (MM/DD/YYYY)</td>
<td></td>
</tr>
<tr>
<td>37</td>
<td>Date this publication was originally created (MM/DD/YYYY)</td>
<td></td>
</tr>
</tbody>
</table>

35. Date the publication was presented to the public – **NOTE: all date fields DO NOT need to be entered.** For example: if you only know the year, you need only fill in that field.
36. **(For Embargos)** Date this publication can be made available to the public – aka embargo date; to be used for materials currently under review for commercial publication. **NOTE – all fields ARE required.**
37. Date the publication was originally created – **NOTE - all date fields DO NOT need to be entered,** as noted for (35).
Also Note: use of a date indicator is not required, so you may choose not to use any of these fields; or you may use only one of them ((35) or (36), for example), or, particularly for older material, you might choose to use (37) and (35). It is completely flexible and up to you. See also (43) below.

38. Option to allow entry of information pertaining to materials that have been published in other venues such as journals or books. Selecting No will hide fields 39-42.
39. Add new Publisher – add a new publisher to the list of publishers.
40. Dropdown list of publishers.
41. Add new place of publication – add a new location for the publisher.
42. Drop down list for place of publication.
43. Date Published – date the publication was published - NOTE - all date fields DO NOT need to be entered, as noted for (35). If date is entered here, you may skip options (36)-(37).
44. Citation for the publication (optional).
8.4 Adding Publication Contributors - Publishing Name Authority Control

The system does its best to maintain authority control with respect to authors within the system. The following shows the screen to add contributors to publications:

1. Full text search of existing contributor names in the system.
2. Option to add a new contributor to the system.

The first thing you should do is search to see if the contributor name already exists in the system. You can search by first name, last name, or a truncated version of either one, e.g.: Rob* will find Robert, Rob, Robb, Robin, etc.

Searching for the name “Nathan” will result in the following update to the screen:
The system found seven contributor names with the name Nathan. The following is a description of the numbered items:

1. Search box for authors.
2. List of names found.
3. Add person name option. This allows a user to add another name to the current name in the listing – for example if the user is publishing under a variant name on this work.
4. Your Name indicator – indicates that the name belongs to the user currently submitting.
5. Add – will add the user as a contributor to the publication and will be listed on the right hand side of the screen.
6. Authoritative Name indicator – indicates the system recognizes the name as the authoritative name. Any person with only one name associated with their record will always have that name designated as authoritative.
7. Allows the user to add an entirely new person name if the name they need to associate with the publication cannot be found in the system.
Clicking the Add link next to any of the names will place that name in the contributor side, as shown below:

The following is a description of the numbered items:

1. If multiple contributors are associated with this publication, list them in the order you want.
2. Select the appropriate contribution type: Author, Thesis Advisor, Composer, etc.
3. If a mistake is made, the contributor can be removed from the list.
4. Added indicator – shows the name has been added to the publication.

If you search and cannot find the contributor, you can add a new contributor by clicking the Add New Person button. The following shows the screen to do this:
The following is a description of the numbered items:

1. Basic Name information – only first and last names are required, all others are optional. “Numeration” can be used for designations such as Jr. or Sr., as well as II, III, and the like.
2. Check box to indicate that the name belongs to the user who is submitting the publication.

Adding the name information will add the name to the list of contributors, and make the name accessible in future searches when submitting new publications.

8.5 Preview Publication
The following shows the information stored in the publication for preview. The following is a description of the numbered items:

1. Edit Files – allows the user to go back and edit the files selected.
2. Allows the user to edit the metadata entered.
3. Button to proceed to the next step of submitting the publication to a collection.

8.6 Submitting to a collection

Once you are satisfied with the publication you can click the Submit to Collection button. The following shows the Submit to Collection screen:
Depending on permissions, you may or may not be able to submit to a collection. The following lists the three different possibilities:

1. You have direct submit privileges: you can click the Submit link, and then the Complete the Submission button, and your publication will go directly into the collection.

2. You have Reviewed Submission privileges. Your publication will be sent to a third party for review prior to acceptance into the collection.

3. Can’t Submit – you don’t have rights to submit to the specified collection. (If you believe you should have rights, send a message to the system administrators.)

4. List of collections the publication will be submitted to – currently there are none.

5. Completes submission into all selected collections.

Clicking the Submit or Reviewed Submission link associated with a collection in the left hand list causes that collection to be displayed in the right hand column, showing which collection (or multiple collections) your publication will be submitted to. For example, selecting the Anthropology collection and the Chemistry Department collection will result in the following screen. I have permission to make “direct submissions” to the Anthropology collection, but my submission to Chemistry Department will be reviewed before being finalized. **NOTE** – you can submit to multiple collections. **Also**, you may have submission privileges to child collections, but not the parent collection. Click the name of the parent collection to see the child collections and your submission privileges.
The picture above shows the publication added to the Anthropology and Art & Art History collections (1). You can remove a collection from the “Submit to” list by selecting Remove (2). To navigate into the collection to submit to a sub-collection, click the collection name in the table on the left. The example below shows navigating into the Anthropology collection:

To navigate back, use the path links (1).

Selecting the “Complete Submission” button will submit the publication to the selected collections and show you a confirmation screen like the following:
1. List of collections the publication was submitted to without requiring approval.
2. Link to the publication in the repository.
3. List of collections requiring review of the item prior to acceptance.

8.7 Editing a publication

If you are the owner of a publication – meaning you submitted the publication to IR+ – you are able to make some changes to the publication. An administrator will have more privileges, for example, restricting viewing, deleting, and other administration capabilities. If you need help contact your repository administrator.
1. Set of buttons that allows you to edit the publication:
   a. Edit Publication – takes you into the screens to edit the publication (just like the initial publishing process). This will NOT create a new version but allows you to make changes to files and metadata.
   b. Withdraw publication – this removes the publication so it can no longer be accessed except by your IR+ system administrators.
   c. Add New Version – allows you to add a new version of the publication.
   d. Add to Researcher Page – allows you to add the publication to your researcher page. A user will only see this option if they have a researcher page – see section 10 for researcher pages.

8.7.1 Withdraw Publication

By selecting the withdraw publication button, users can withdraw a publication. The following screen will be displayed:

A user must include a reason for the withdrawal and can opt to let the metadata be displayed.
8.7.2 Add new version

By selecting the Add New Version button on a publication, you can create a new version of the publication. This brings up a display of your current personal publications (the “My Publications” tab) and the options to add any personal publication as the new version.

8.8 My Publications Tab

All publications you create are stored in the My Publications area, including “in process” and finished works. If you get interrupted in the publication process, or simply decide to finish a publication process later, or want to submit a finished publication to additional new collections, go to the My Publications tab. There you can resume the publication process, or submit a publication to additional collections. Below is a screen shot of the My Publications tab:
The following is a description of the numbered items:

1. Current location (path).
2. List of Folders and Publications at the current location.
3. Button to manage publications and publication folders
   a. New Folder – create a folder to organize publications
   b. Create a publication – create a new publication for submission
   c. Move publication and publications folders
   d. Delete publication and publication folders
4. Dropdown menu for actions on a single publication.
5. Name of the publication; selecting the name will allow you to edit the publication information.
6. Folder for organizing publications – selecting the name will cause you to navigate into the folder.
7. View the properties of the publication (version and sharing information, administrative information – size, owner, etc., various action buttons).
8. Submit the publication to an institutional collection.
9. Flag that indicates if the publication has already been submitted to one or more collections.
10. Edit the folder information.
11. Indicates that a publication is being reviewed for acceptance.

### 8.8.1 Editing an existing publication and Versioning

To edit an existing publication select the name of the publication. This will return you to the publication process. If the publication has already been published to an existing collection, a new version of the publication will be created. A note like the following will alert you that a new version is being created:
Clicking Yes will create the new version. If the publication has not yet been published, a new version will not be created and you will be taken into the normal create publication process.

### 8.8.2 Publication Properties

The following is a list of the numbered items:

1. Path to the publication.
2. List of versions for the publication. If the publication has been published and accepted into one or more institutional collections, it displays those collection(s) names.
3. Selecting the version number will display the content of that version.
4. Selecting the collection name will take you to that institutional collection.

8.8.3 Folders – organizing publications

To create a folder to organize your publications, select the New Folder button. The following screen will be shown when creating a new folder:

![Folder creation screen](image)

When you enter the name, the folder will be added to the current location. The example below shows the created folder:
You can also move publications and folders. The following shows moving a selected folder and publication (1) using the move workspace button (2):

![Workspace for: System Admin]

Path: / My Publications /

The following screen should be displayed:
The following is a description of the numbered items:

1. Cancel Button – to cancel the move.
2. List of collections and publications being moved.
3. Current location and contents of where the selected data will be moved to.
4. Move button.
5. Current view of the Move To location.

Navigating into the Older Publications folder by clicking its name shows the following:

By selecting the move option, the publication and folder on the left are moved into the Older Publications folder. The user is then taken to the display of the contents of the “Older Publications” folder, as shown below:
### 8.8.4 Deleting publications and Publication Folders

You can delete a publication if it is no longer needed or you would like to clean up your personal workspace area. Deleting publications from your personal workspace **will not** delete publications that have been published to institutional collections.

To delete a publication or folder select the dropdown next to the publication, as shown below:

You will be asked to confirm the delete as shown below:
Clicking Yes will delete the selected materials. If a folder that contains files is selected, the folder and all of its contents will be deleted. In this case it is a single delete.

### 8.8.5 Importing MARC records

Allows a user to import MARC records into the My Publications area.

**NOTE:** You must have IMPORT privileges to have the import MARC records feature. If you do not see this option and feel you should have it, contact your administrator.

1. My Publications tab of the administrator
2. Option to import MARC records.

Selecting the import MARC records option takes the administrator to the following screen (**NOTE:** if you are within a folder on the My Publications tab, the MARC records will import into the current folder):
1. Allows the administrator to browse to the file to import on their personal file system.
2. Selecting the upload button will cause the MARC records in the given file to be imported.

**NOTE:** It is recommended that users check that the MARC file is valid. A tool like MARC edit is very helpful to validate records. To do this, open the file in the MARC editor then go to tools->Validate MARC Records.

Uploading the files will bring up a screen like the following:
This provides basic upload information and can be useful for viewing what was imported. Selecting the Back to Workspace link will show the uploaded publications; an example is below:

9  Workspace Searching

After a while, you may find that you need to search for files within your workspace. To search within the workspace, select the “Search My Workspace” tab. This will bring up a screen like the following:

By entering a word or phrase, the system will perform a full text search against files, folders and publications. The example below shows a search for IR:
Researcher Pages

If you have been given “Researcher Page” abilities, you will be able to create a Researcher Page. A Researcher Page is a great way to show off your work and give people access to your publications and links to information on the web, such as links to your articles in online journals. It is also a handy way to share specific files with other users, such as your CV and other personal publications from your workspace.

10.1 Accessing Researcher Page Tools

To access the Researcher Page tools, select the Researcher Page menu as shown below see (1):
This should take you to a screen like the following:
The following is a description of the fields:

1. **Preview Researcher Page** – allows you to view what your Researcher Page will look like to the world.
2. **Tabs to manage Researcher Page information:**
   a. **Personal Information** – basic personal information about yourself (as shown above).
   c. **Pictures** – pictures for the Researcher Page.
d. Links – links to other web pages; for example, if you run a blog, or have a non-work related personal web page.

3. Title – Professor, Dr., Provost, etc.
4. Departments to which you belong:
   a. Use Ctrl-click to select multiple entries if you belong to more than one department.
   b. Add New Department allows you to add another department to the set of departments in the dropdown list, if your department is not already listed.

5. Field – field of study that you are in:
   a. Use Ctrl-click to select multiple entries if you would like to have more than one field to appear on your Researcher Page.
   b. Add New Field – allows you to add another field to the dropdown list.

6. Campus Location – your office address.
7. Phone Number – phone number where you can be reached.
8. Email – address you would like to appear on your Researcher Page.
9. Fax

10. Save – select when you have finished entering user information.
11. Research Interests – whatever you would like to say about your research.
12. Teaching Interests – whatever you would like to say about your teaching.
13. Search Keywords – to help people find you when they search researchers.
14. On/Off option – default is off. By selecting “On” your Researcher Page is viewable to the public, and will be indexed by search engines.

10.2 Adding Research to your Researcher Page

Clicking the Research tab should show the following:
The following is a description of the numbered items:

1. Actions to add materials to your Researcher Page.
2. Path to your Researcher Page.

10.2.1 Adding a Folder

To add a folder, click the add New Folder button. This should bring up a screen like the following:

Enter the folder name and description and click Submit. This will create a folder in the current location.

10.2.2 Adding a link

To add a link to the Researcher Page in the current location, select the New Link option. This should bring up a screen like the following:
Enter the Link Name and Link URL and click Submit. The description is optional.

### 10.2.3 Adding a File

Clicking the Add File button will allow you to add files from your workspace, so you can provide access to files that have not been published into the repository. Clicking Add File will take you to the following screen:
The following is a list of numbered items:

1. Back to your researcher folders.
2. Current location in your personal files and folders.
3. Current list of files and folders in your personal workspace that can be added to your Researcher Page.
4. Current location (in the directory, or folder, structure) on your Researcher Page. When you add files to your Researcher Page, they will be listed here.
5. Current list of information on your Researcher Page.

You can navigate to your files by selecting folders (left hand side). For example if I click on the folder name “work” the screen will look like the following:
Selecting the ‘Add’ link will add the file to the current location in your Researcher Files and Folders (column on the right). For example, if I add ir_plus_admin_meeting_8_17_09_agenda.doc, it will look like the following:

You can alter the version by selecting the dropdown associated with the filename. The default is the most recent file version (1).

If you wish to navigate to a new location on your Researcher Page, select a folder listed under Researcher Files and Folders. For example, if “Software Research” was selected, the page would look like the following (there are currently no files or links in the Software Research folder):

10.2.4 Adding a personal publication

You can add a personal publication by clicking the Add Publication button. This will bring you to a screen like the following:
The following is a list of the numbered items:

1. Button to take you back to your researcher files and folders.
2. Current location in your personal publications and publication folders. Use this display to locate the publication you wish to add to your Researcher Page.
3. Current list of publications in your workspace, which can be added to your Researcher Page.
4. Current location (in the folder structure) on your Researcher Page. This is where you add publications to your Researcher Page.
5. List of information at the current location on your Researcher Page.

Selecting the Add option next to the publication will add the publication to the current location in your Researcher Files and Folders. For example, if “The IR+ Administration Documentation” is added, it will look like the following:
You can alter which version is displayed using the dropdown. The default is the most recent version (1).

You can navigate to your publications in your personal workspace by selecting the folders. For example if “Older Publications” is selected, the screen will look like the following:

If you wish to navigate to a different location on the Researcher Page (see right hand side of screen), select a folder name in the list of Researcher Files and Folders. For example, if “Software Research” is selected, the page would look like the following (there are currently no files or folders in the “Software Research” folder):
10.2.5 Removing Information from the Researcher Page

Select the files you wish to remove (1) and select the Delete button (2). (NOTE – this does not delete files or publications in your personal account, it only removes them from your Researcher Page).
10.2.6 Adding Pictures

To add pictures, click the Pictures Tab. This should bring up a screen like the following:

To add a picture, click the Upload Picture button. This will bring up a screen like the following:

The following is a list of the numbered items:

1. File upload box – allows you to browse to the file you wish to upload.
2. Primary Picture – tells the system this is the first picture you want shown when people visit your site.

Selecting and uploading an image file will result in a screen like the following:
You can upload as many pictures as you like.

10.2.7 Adding Links

If you would like to have special link appear with your personal information rather than in your research section (left side of the Researcher page rather than the right side, in the display the public sees) – for example links to a personal web site, your department’s website or related departments – you can add them using the Links tab. The screen should look like the following:

To add a link, click the Add Link button. The screen shot below shows an example where two links have been added:
Selecting the up and down arrows allows you to put the links in the order you want (1). You can also remove links by selecting the remove link (2).

10.2.8 Adding a published publication

You may want to add a publication that exists in the repository. To do this, navigate to the publication you wish to add (See section 3.1 on Browsing). Once you have found the publication you wish to add you should see an option (1) like the following at the bottom of the publication (Note: you must be logged in):
Selecting the button will take you to a screen like the following:

The following is a list of the numbered items:

1. Publication to add to your researcher page
2. Add button to add the publication to the current location in your research folders
3. Current location in your researcher page folders
4. Listing of information currently in your researcher page
Selecting the add button will cause the publication to be added and take you to the location added in your researcher page folders as shown below:

10.2.9 Previewing your Researcher Page

To preview your Researcher Page, click the Preview Researcher Page link. This should show you a screen like the following:
The following is a description of the numbered items:

1. If the Researcher Page is OFF it will notify you – only the owner can see the Researcher Page if it is OFF.
2. Researcher Picture – this shows the picture you uploaded. If you haven’t uploaded a picture, a silhouette is shown.
3. Researcher Information – all researcher information you have entered is shown.
4. Links you have entered.
5. Research box – list of publications, etc., that you have added to the page.
6. Link to toggle back to edit mode.