User Manual:
Trace Community Manger Guide

Fall 2010 Tennessee Research and Creative Exchange

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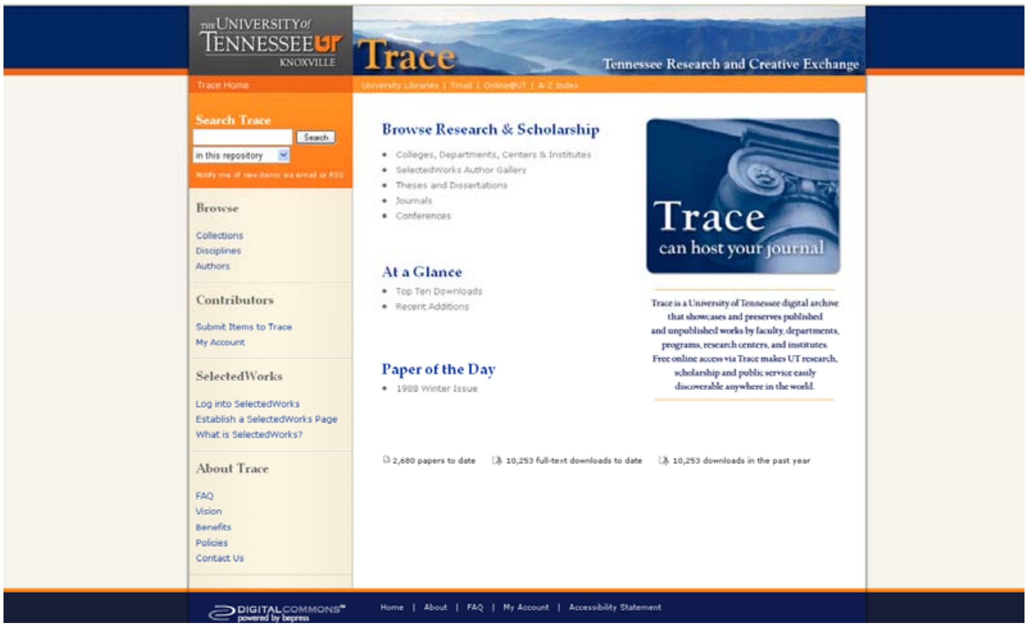
For further information on a particular topic, you may contact the appropriate librarian liaison from the following page: Subject Liaison Librarian

INTRODUCTION

Trace is a University of Tennessee digital archive that showcases and preserves published and un-published works by faculty, departments, programs, research centers, and institutues. Free online access to Trace makes UT research, scholarship and public service easily discoverable anywhere in the world.



Trace can be found at:
http://trace.tennessee.edu/

Trace is hosted by:

DIGITALCOMMONS™ powered by bepress

This manual serves as a basic guide for administrative configuration and editing of a Trace commu-nity and the items submitted. Instructions for managing Trace are provided with illustration and step -by-step guidance. This resource is current as of Fall 2010, and images and instructional content refer to this version of the Trace repository.

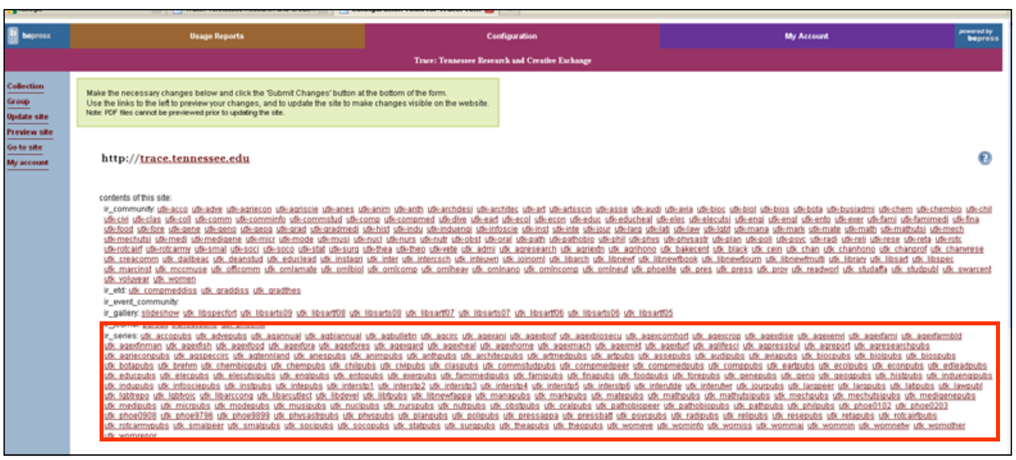
Getting Started with Trace: Configuring Your Community

Log in to Trace:

-Go to http://trace.tennessee.edu

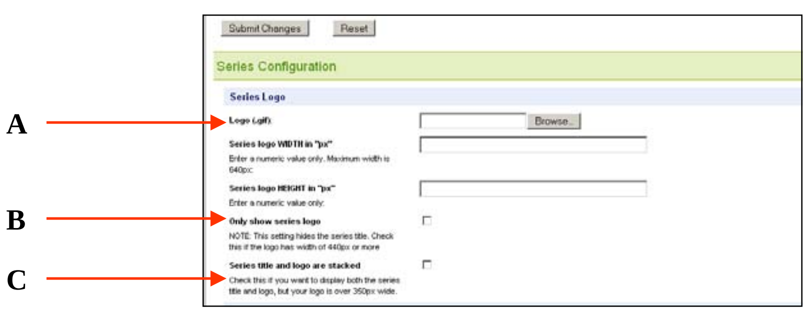
-From the homepage, select *My Account* from the left-hand menu, and enter your NetID and password.

The collections will be listed on the *My Account* page, under *ir_series*. Click on your community, or the series you wish to configure.



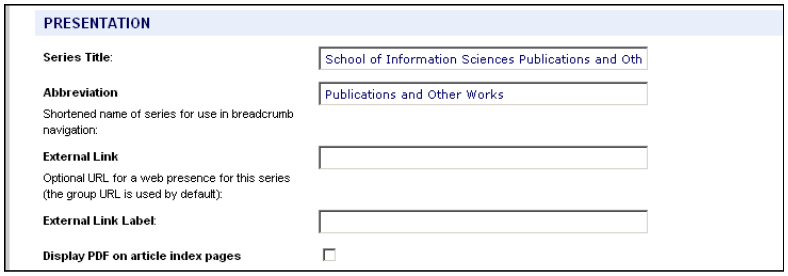
Configuration Options:

- *A)* **Adding a logo**: This will be the image that will display at the top of your community page. This file must be saved as a .gif, and the maximum width is 640px. If the image contains the community name (e.g. a banner), you can select the *B)* *"Only show series logo?"* box. Also, if you wish to have the community title above the image, select the *C)* *"Series Title and Series Logo are stacked"* option.



Getting Started with Trace: Configuring Your Community

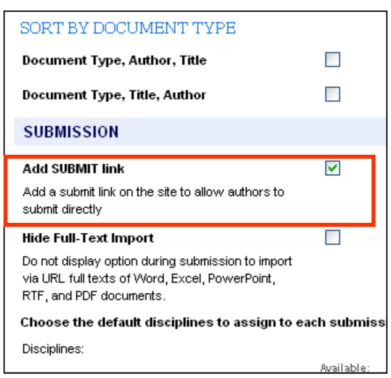
Other configuration options are available for the Series page. These include **Series Title, Abbreviation, External Link, External Link Label, and Introductory Text**.



- *Series Title*: Sets the title for your community. The title is used in the masthead, automated emails, sitemap links, etc.
- *Abbreviation*: Use this field to enter a shortened name of the community for use in the breadcrumb display, the navigation options located at the top of each page in Trace.

  Ex. Home>Communications>Information Science>**Publications and Other Works**
- *Introductory Text*: This field allows for text to be displayed under the title and logo on the page. Enter any relevant text and information here.

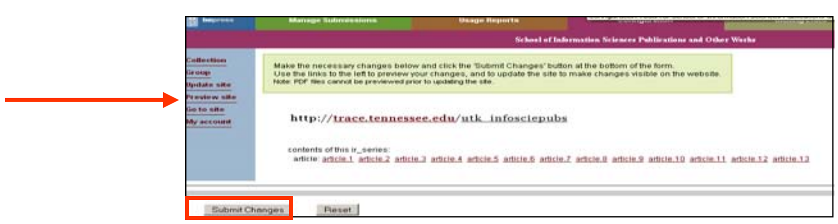
  NOTE: if there is more than one paragraph or stylized formatting is needed, insert **<p>** at the beginning of each paragraph, and **</p>** to signify the end of each paragraph. A list of other common HTML tags can be found at the end of this guide.



There are a number of additional options available from the main configuration page for a series, though many of the default settings will be sufficient for Trace and many are fairly explanatory. One important option, though, is found under the *Submission* heading, titled ***Add SUBMIT link***. This allows you to determine whether individuals can submit directly from the front end of Trace, or whether they must first receive approval.

Making Changes Permanent:

- **Submit Changes**: To make changes in Trace, select this button at the top or bottom of the page.
- **Preview site***:* To preview these changes before making them visible, you can select this option, and new window will open to show you the Trace page.
- **Update Site**: To make the changes visible in Trace, you must also click thisoption on the left -hand menu at the top of the screen.

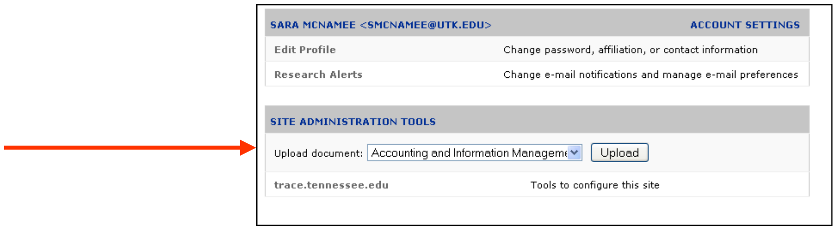


Manager Tools: Uploading

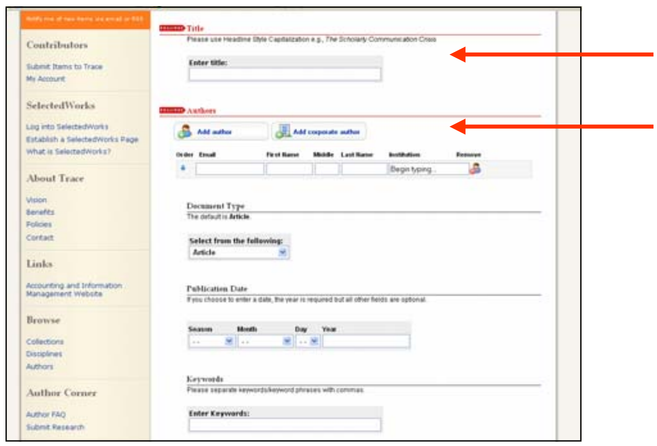
Uploading for an Author:

To Submit:

1. Go to your *My Account* page and log in.
2. From the *Site Administration Tools* section, choose your community, and click *Upload*.



3. Basic submission information fields include: [NOTE: you may request form customization if your community requires it.]



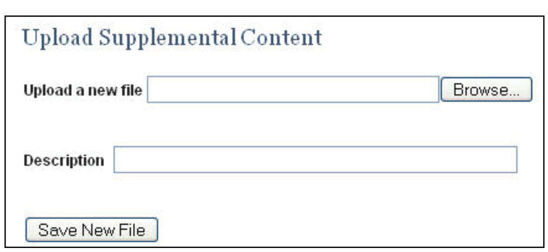
- *Title:* enter the title of the submission exactly as you would like it to appear.
- *Author:* Enter the name(s) as it appears on the publication.
- *Publication Date:* If you know the year of publication, you may enter it here. Enter the year. Day, month, and season are optional.
- *Abstract:* Enter abstracts by pasting or type them into the form. Make sure you choose the appropriate option to describe the format of your abstract so that it will display correctly in Trace. If there is more than one paragraph, HTML tags will be needed.

NOTE: Those fields designated with a Required arrow must be filled out!

6. If you have supplemental files to post, check the box next to '*Please check this if you would like to add additional files*'. After submission, you will have the option to upload them.

7. After all the information has been entered, click ***Submit.***

Note: If you selected the option to upload additional files you will be taken to a new browse screen to locate and add descriptive text to each file. The descriptive text will be published on the site along with the file. Once all files have been uploaded and labeled click Continue.

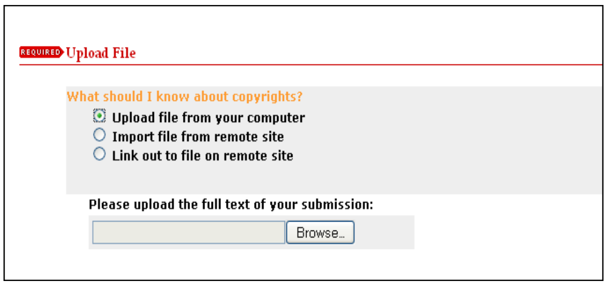


Manager Tools: Uploading

4. Upload the file or document.

   -If you select "*upload a file*", you will be given a browse box option to locate the file on your computer or network. PDF is the default format for text documents.

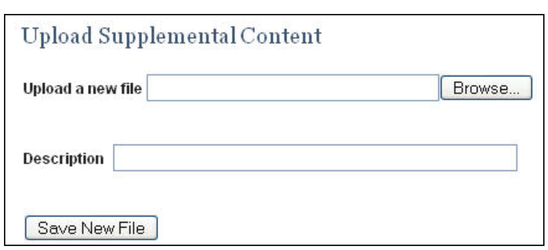
4 -If you select "*provide a link to the full text on a remote site*", you will be given a box to paste the link into. When the document is posted, the article page will display a link to the URL you enter here.



5. If this document was previously published in a journal, click the "*Yes*" button under *Publication Status*. The system will generate a "OpenURL"- a link to find that article in the user's home library collection.
6. If you have supplemental files to post, check the box next to *Please check this if you would like to add additional files*. After submission you will have the option to upload them.

7. After all the information has been entered, click *Submit*

NOTE: If you selected the option to upload additional files you will be taken to a new browse screen to locate and add descriptive text to each file. The descriptive text will be published on the site along with the file. Once all files have been uploaded and labeled click *Continue*.



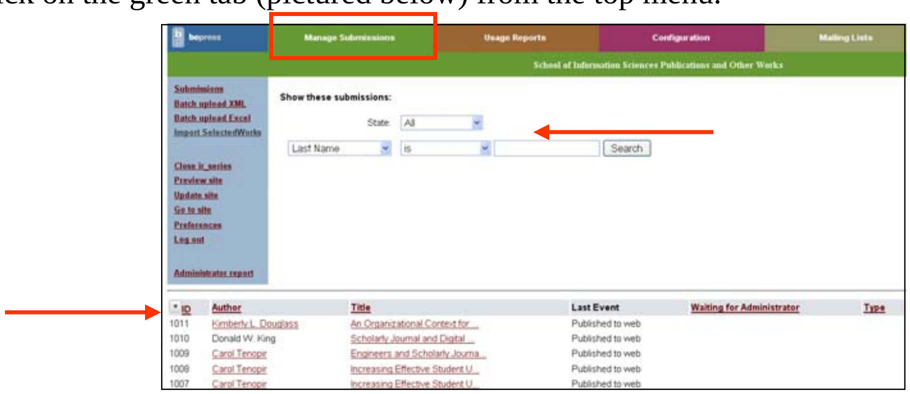
Manager Tools: Manage Submissions

After submitting a paper, you will see a confirmation screen, listing your options:

- *Revise your Submission:* Returns you to the submission form where you may make any nec essary changes to your submission.
- *Upload Another Submission:* If you have more content to submit before posting, you may click here to upload another submission.
- *Manage All Submissions:* Allows you to view all submissions uploaded to the system.
- *Update Site (series):* Allow you to update the series and post any submissions.

Reviewing and Posting Submissions:

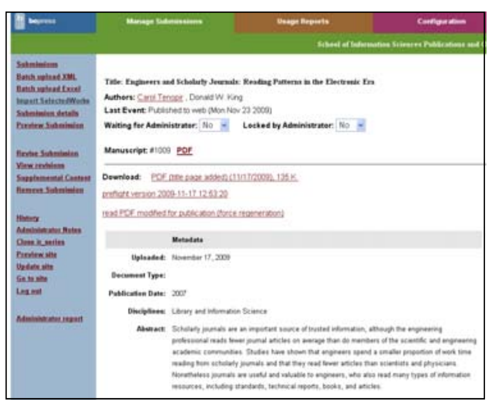
- On the *My Account page*, select *Manage Submissions* for the appropriate series or collection. Click on the green tab (pictured below) from the top menu.



This brings you to the main submission page (above). Unpublished items are displayed by default. Use the drop down boxes to search for specific submissions. Click on the underlined headings for each column to reverse the sort order.

- *Individual Submission Details Page:*

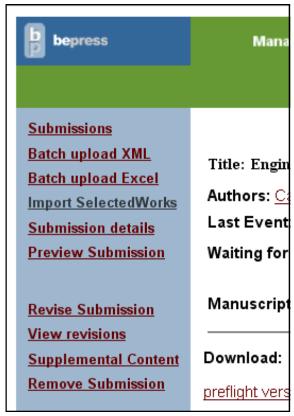
  -Click on the title to view the information about a specific item. The *Submission Details* page shows information about the submission, as well as links to download the electronic files, if any.



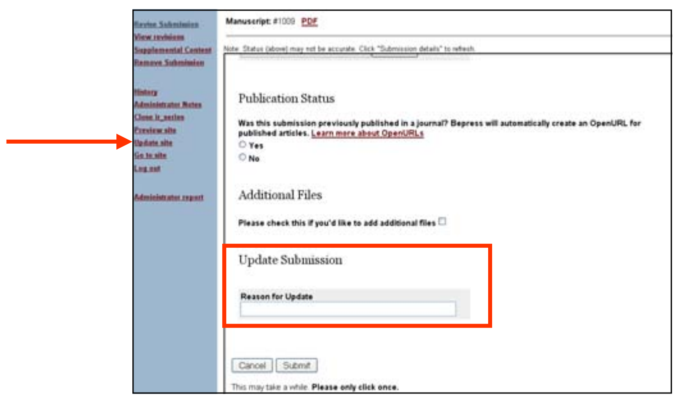
Waiting for Administrator: On the green Manage Submissions tab, the system automatically displays a red “waiting for administrator” dot beside submissions that may require administrator attention (e.g., the author uploaded a revision, a reviewer posted a review, etc.). You may override that designation by changing the menu from “Yes” to “No,” or vice versa, at anytime.
Locked by Administrator: If you change this menu to “Yes,” the author will be immediately unable to use the Revise submission link.
Download: Clicking this will allow you to view the most recent PDF version of the item, including the system-generated title page and header/footer.

Manager Tools: Manage Submissions

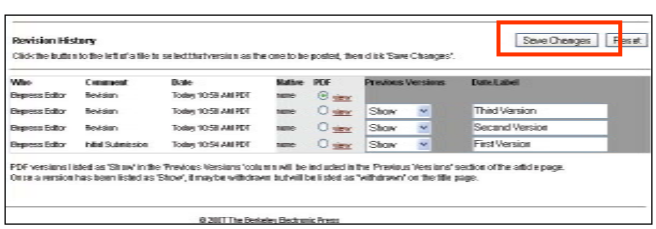
- ***Sidebar Options****:* You will find the following links in the left-hand sidebar of the Submission Details page. Some links are visible only after certain actions have been completed.



Submissions: Returns you to the main Manage Submissions page.
Preview Submission: Displays the submission as the page would appear in Trace.
Revise Submission: To make a change to a submission, submit a revision by clicking this link. A new window will appear with the original “Upload Submission” form to edit. Change the necessary elements on the form and enter a brief description of the changes in the “reason for update” field. To make the updates visible in Trace, click ‘Submit,’ and then select the *Update Site* option on the left-hand toolbar.

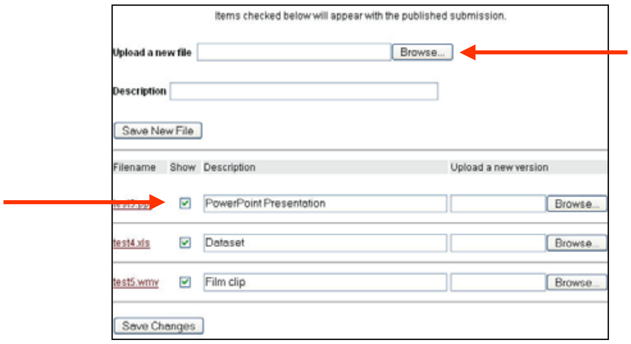


View Revisions: The “*Revisions History*” allows you to see who made the submission and any subsequent revisions. It also allows you to select which version will be accessible in Trace by selecting the button to the left of the file desired, and clicking the ‘Save Changes’ button.



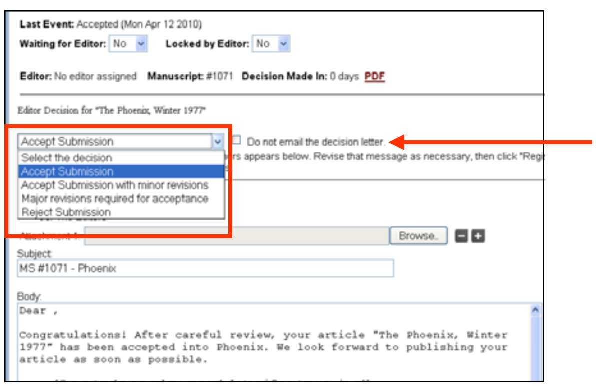
Manager Tools: Manage Submissions

-*Supplemental Content*: You may submit these supplemental files at the time you make the original submission or add them at a later date.
1. To upload a new file, click the *Browse* button to browse your hard drive or network. Choose the file to upload and add a description (this description will be shown on the site).
2. To prevent access to a supplemental file, deselect the box in the *Show* column.
3. To revise, click the *Browse* link to the right of a saved file, and select a replacement file.
4. To change the description, edit the description box.



When the edits are complete, click the *Save Changes* button to preserve your modifications. Again, to reflect the changes in Trace, click the *Update Site* option on the left-hand toolbar.

-*Register Decision*: Click this to either accept/reject/request revisions to a submission. Though an author may submit an article, the article must then be approved before it will be published in Trace. From the drop-down menu, choose your option. Choosing an option will prompt a preformatted Decision Letter to generate. Note: It is optional to send the decision letter. Select the *Do not email the decision letter* box to the right of the drop-down menu. The options are pictured in the drop-down menu below:



1. Accept: choose this letter for submission you intend to publish as-is.
2. Accept with Minor Revisions: Choose this letter for submissions you intend to publish but need some minor changes before you can do so.
3. Major Revisions Required for Acceptance: Choose this letter for submissions you are considering but require significant changes.
4. Reject: Rejected submissions can be neither revised nor accepted afterwards so this decision should be used with caution.

-Change any of the text as needed and click *Register Decision* on the right-hand side of the page to send the letter. Remember: To make the changes visible on the site, always click *Update site* on the left-hand menu!

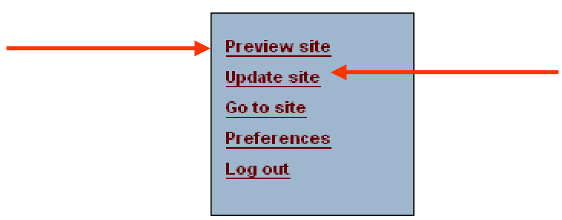
Manager Tools: Manage Submissions

-**Remove Decision**: This link allows you to withdraw an entire submission on behalf of an author. This is helpful if the author has made duplicate submissions. Once removed, it cannot be posted, so this option should be used with caution.
-Click the Remove submission link.

—>Click *Remove, no notification* to confirm your selection without sending the letter suggested on the screen.
—>Click the *Remove* button to confirm you selection and to send the letter displayed to the author.
-Click the *Update* link if you are removing a submission that has been posted.

-**Delete Submission**: This differs from the *Remove Decision* option in that it allows administrators to permanently delete a submission. It will leave no record of the submission in the system and cannot be reversed.
1. Click the Delete submission link
2. Click the Delete submission button to confirm your selection. Immediately, the submission will no longer be visible within the system, including the author's My Account page, and no notification email will be sent to the author.
3. Click the Update link, if you are deleting a submission that has been posted.
Once the series has been updated, the URL where the submission existed will show an error message, as if the submission had not been posted.

Like the **Community and Series configuration** pages, the left hand menu also has the *Preview site* and *Update site* options.

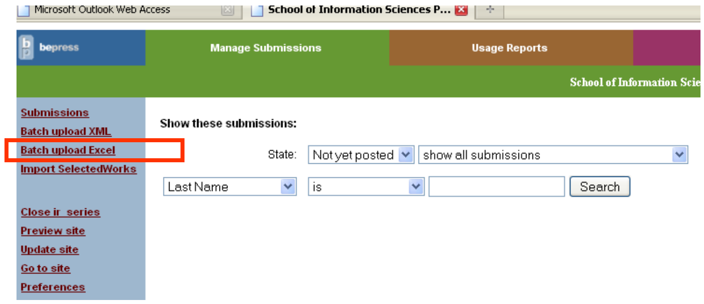


-**Preview Site:** Allows you to view the series homepage before changes are live.

-**Update Site:** If you have posted submissions, or submitted revisions to posted submissions, use *Update* to have those changes carried through to the site. You will receive an email when the update has completed.

Manager Tools: Batch Upload Via Excel

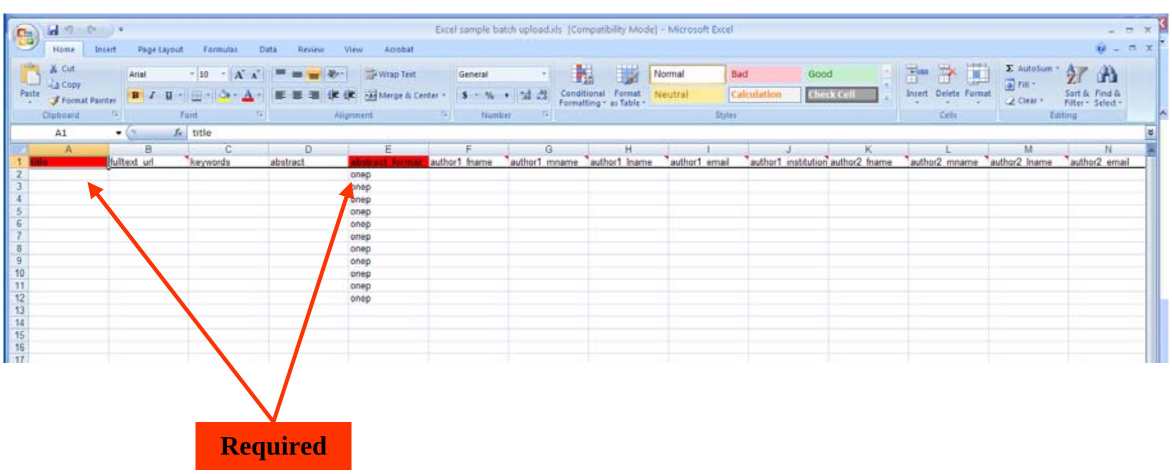
Digital Commons allows administrators to upload multiple records at one time by using the Batch Upload option found on the Manage Submissions page of a series. An Excel spreadsheet is downloaded that can be used to enter multiple records' data and subsequently uploaded to the particular series in Trace.



To upload content using an Excel Format:

1. Each series has a unique Excel spreadsheet. From the Manage Submissions page for any series, click the sidebar link '*Batch Upload Excel*.'
2. Click '*Download*' to download the spreadsheet to your computer.

3. A spreadsheet with preconfigured fields will be downloaded, and will look similar to the one below.
4. Complete the spreadsheet, on record per row, with the information you wish to upload. The fields in **red** are required for each record. You can hover your mouse over the column headers to information on each field.



Manager Tools: Batch Upload Via Excel

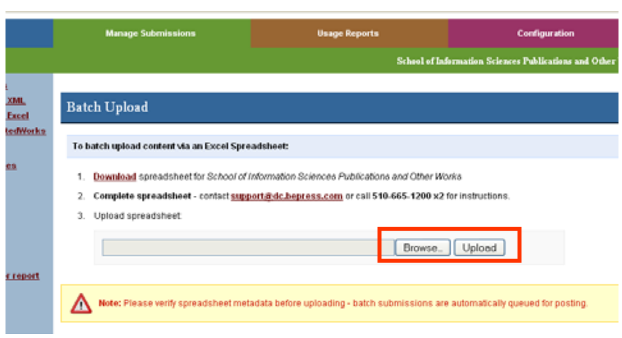
Common fields for Batch Upload:
-*abstract*: the abstract/description for the article.
-*abstract_format*: the default is One Paragraph (onep). The options are:
- **-cr**– multiple paragraphs, as indicated by carriage returns
- **-onep**– one paragraph
- **-blanks**– multiple paragraphs, as indicated by blank lines
- **-html**– paragraphs formatted with HTML tags

-*author1_fname*: first author/creator's first name
-*author1_lname*: first author/creator's last name
-*author1_email*: first author/creator's email address
-*author1_institution*: first author/creator's institution

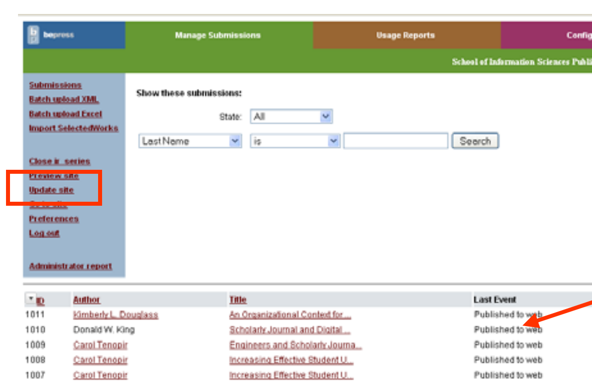
NOTE: Additional author/creators can be entered as author2_fname, author2_lname, etc. Four authors can be included.

-*create_openurl*: Default to FALSE which does not create an OpenURL for the article. To create an OpenURL for an article, place TRUE in this section.
-*custom_citation*: used when the series needs a specific, custom citation rather than a default.
-*document_type*: the document type for each record.
-*fulltext_url*: The URL of the main document.
-*publication_date*: the publication date of the record. Use MM/DD/YYYY format.

5. When you have completed the spreadsheet, save the file, return to the "Batch Upload Excel" screen, and upload the file.



6. If the upload is successful, you will receive a confirmation email. If there were any problems, you will get an error message with instructions for revising the spreadsheet.
7. To make the items visible in Trace, return to the Manage Submissions screen, change the status of the submissions to "Posted", and click the *Update site* link on the left-hand menu. The items should now be visible in the Trace series.

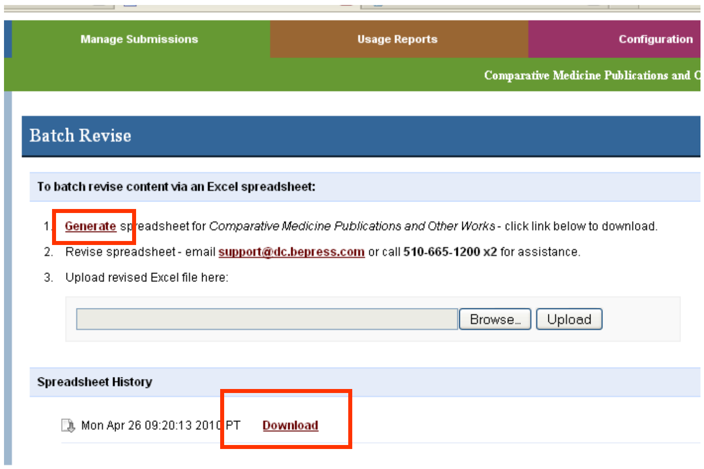


This will say "Posted"

Manager Tools: Batch Upload Via Excel

To Revise:

1. Export the existing batch from Trace:
   -Click the 'Batch Revise Excel' sidebar link on the Manage Submissions screen.
   -Click 'Generate.' A spreadsheet of the current metadata for the series will appear at the top of the Spreadsheet History. Download this file.



2. Revise the batch and resubmit:
   -Using the spreadsheet from your batch export, enter the changes and new submissions.
   -When you have finished, return to the 'Batch Revise Excel' in Step 1 of the instructions, and upload the revised file.

Appendix

I. BePress/Trace Standards and Best Practices

-Why use standards?

Although much non-standard HTML will appear fine in a browser, using standard HTML formatting will benefit Trace by:

-Ensuring that the site remain up-to-date and be easier to keep up-to-date in the future. This ensures that the standard code used will be supported by future browsers.
-Making the site faster. The amount of actual code being sent to the visitor is significantly reduced, making load time shorter for users.
-Making the site more versatile to work on non-traditional browsers like cell phones, mobile handheld devices, and other portable technologies.

-Best Practices

Tag Structure

In XHTML every tag must be opened AND closed. This applies even to self-contained tags such as line breaks, horizontal rules, and images. This is done by inserting a backslash in to the self-contained tag itself. A few examples:

The line break tag should be written as:

```
<br />
```

The image tag should be written as:

```
<img />
```

All links and images should include a description. For links this would use the title property. For images this would use the alt property. This is important for accessibility standards as this will provide a description for disabled users who use text-to-speech screen readers.

```
<a href=“http://www.youlinkhere.com/” title=“Link Description”>This is my link
text.</a>
```

```
<img href=“http://www.image_url.com/” alt=“Image Description” />
```

Text Formatting

All text must be formatted within an appropriate tag. For most text this would fall under paragraph tags.

```
<p>This is a normal paragraph of text.</p>
```

The <*b*>, <*i*>, and <*u*> tags are deprecated as of HTML 4.01. In accordance with XHTML Standards, the following tags should be used in their place:

Bold text should be wrapped in <strong> tags.

```
<strong>This text would appear bold!</strong>
```

Italicized text should be wrapped in <em> tags.

```
<em>This text would appear italicized!</em>
```

As a general rule, underlined text should almost never be used. Most users confuse this text with a hyperlink. In an underline is absolutely necessary, please apply a <style> tag as follows:

```
<style="text-decoration:underline">This text would appear underlined!</style>
```

-XHTML Examples

<**p**>This is the first paragraph</**p**> <**p**>This is the second paragraph</**p**>	This is the first paragraph This is the second paragraph
<**p**>This is a line of text with a linebreak Here. <**br /**> This is the text after</**p**>	This is a line of text with a linebreak here. This is the text after
<**strong**>bold text</**strong**>	bold text
<**em**>italicized text</**em**>	italicized text
Text with <**sub**>subscript</**sub**>	Text with $_{\text{subscript}}$
Text with <**sup**>superscript</**sup**>	Text with $^{\text{superscript}}$