HOW TO USE THE IR@UF:

UPLOADING CONTENT & RIGHTS MANAGEMENT

Christy Shorey
Institutional Repository Manager
chrshor@uflib.ufl.edu

IRManager@uflib.ufl.edu
What will I learn today?

- Definition of Institutional Repository
- IR@UF
  - How to get there
  - What does and does not belong in the IR
- Using the IR@UF
  - Logging-in
  - Requesting permission to upload
  - Uploading items into the IR
  - Making changes to an item
- Rights Management
  - Importance of rights management
  - Rights management statement options
  - Creative Commons licenses
What is the IR@UF?

The *Institutional Repository at the University of Florida* (IR@UF) is the digital archive for the intellectual output of the University of Florida community, and includes research, news, outreach, and educational materials.

* A place (IR@UF)
* for an **institution** (University of Florida)
* and its **members** (students, faculty, staff)
* to put their **stuff** (research, news, outreach, educational materials, other intellectual output)
* for **access** and **preservation**.
How do I find the IR@UF?

Direct Links to the IR@UF
- http://library.ufl.edu/ufir
- http://ufdc.ufl.edu/ir

From the Library Main Page
- http://cms.ufllib.ufl.edu/
  - Open Access & Copyright >> Institutional Repository (IR@UF)
  - Libraries & Collections >> UF Digital Collections (includes IR@UF)
How do I find the IR@UF? From the library main page
What can you put in this IR Thingee?

- Theses and Dissertations
- ETD Supplemental Materials
- Data and Datasets (standalone or with publications)
- Conference Materials
- Journal Articles
- Book Chapters
- White Papers
- Grant Proposals
- Training Materials
- Newsletters
## Basic Guidelines

Four criteria to determine if something belongs in the IR@UF:

<table>
<thead>
<tr>
<th>Question</th>
<th>Image</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is the item complete?</td>
<td>![Checklist]</td>
</tr>
<tr>
<td>Is it scholarly content?</td>
<td>![Graduation Cap]</td>
</tr>
<tr>
<td>Was it created by member(s) of the UF community?</td>
<td>![UF]</td>
</tr>
<tr>
<td>Do you retain the rights to post the material?</td>
<td>![Copyright]</td>
</tr>
</tbody>
</table>

If you can’t answer “yes” to all of the above, additional research may be required.
How do I get started uploading items?

Three paths to upload

Self-Submittal
• Creator (or delegated agent) loads works using the Self-Submittal tool
• Available to faculty, staff and graduate students
• Video Tutorial: [http://ufdc.ufl.edu/l/ufir/irsubmithelp](http://ufdc.ufl.edu/l/ufir/irsubmithelp)

Individual Mediated Submission
• Creator sends work to IR team, who loads works
• Undergraduate students, items with oversized files, individuals who need additional assistance

Bulk Mediated Submission
• Departments, Centers, Institutes, Conference Organizers, etc, send files and accompanying spreadsheet of metadata IR team who loads the works
  – Theses and Dissertations via Graduate School
  – Undergraduate Research Symposium via CUR
My item is ready to be included in IR@UF... Now What?

Validate Login
• First time you load

Grant UF Permissions to display and archive your work

Add Metadata
• Creator
• Title
• Material Type
• Date

Attach File(s)
• Text
• Audio
• Video
• Etc.

Edit Metadata
• Further Description
• Set Rights Management Statement

Edit Behaviors
How to log in to IR@UF? From IR@UF main page
Welcome Screen: what to expect

Validate Login

- First time you load

Welcome Back, Christine

Welcome to myUFDC. This feature allows you to add items to your bookshelves, organize your bookshelves to friends.

What would you like to do today?

- Start a new item
- View all my submitted items
- View usage for my items
- View and organize my bookshelves
- View my saved searches
- Edit my account preferences
- Track Item Scanning/Processing
- Log Out

Comments or recommendations? Please contact us.

Welcome Back, Christine

Welcome to myUFDC. This feature allows you to add items to your bookshelves, organize your bookshelves to friends.

What would you like to do today?

- View all my submitted items
- View usage for my items
- View and organize my bookshelves
- View my saved searches
- Edit my account preferences
- Track Item Scanning/Processing
- Log Out

Comments or recommendations? Please contact us.
If you would like to contribute materials through the online system, please contact us as well.
How to Upload Items:

**Step 1: Grant of Permissions**

You must read and accept the below permissions to continue.

I, as copyright holder or licensee with the authority to grant copyright permissions for the title, hereby authorize the University of Florida, acting on behalf of the State of Florida, to digitize and distribute the title for nonprofit, educational purposes via the Internet or successive technologies. This is a non-exclusive grant of permissions for on-line and off-line use for an indefinite term. Off-line uses shall be consistent either, for educational uses, with the terms of U.S. copyright legislation’s “fair use” provisions or, by the University of Florida, with the maintenance and preservation of an archival copy. Digitization allows the University of Florida to generate image- and text-based versions as appropriate and to provide and enhance access using search software. This grant of permissions prohibits use of the digitized versions for commercial use or profit unless I specifically grant rights for those uses in the rights field for this item.

You must read and accept the above permissions agreement to continue.
How to Upload Items:

Step 1: Grant of Permissions

Key Points

• You verify that you are the copyright holder or that you have retained the right to openly share your work in an institutional repository.

• You grant UF permission to host and display your work in the IR@UF. Your rights are not altered by this grant of permission.

• We do not profit from putting your work online.

• You are free to distribute your work as copyright holder, or in ways that are consistent with any prior agreements you have entered with respect to your rights in this work.

• We will include a statement that informs users that you own copyright, and that they must contact you for any use that is in excess of fair use or other exceptions available to users under the law. You also have the option to select a Creative Commons license for your work. To learn more, visit http://creativecommons.org.

• We will archive your work, and it will be assigned a permanent URL that will link to your item indefinitely.
How to Upload Items: Step 2: Item Description

The only required fields are Title and Material Type

However, as soon as you click “Submit” at the end of Step 3, your item is live, and available to the public

It is better to include as much description up front to aid people in finding your work

Add Metadata
- Creator
- Title
- Material Type
- Date
How to Upload Items: Step 2: Item Description

- some handy tips

• **Material Type** options include:
  - Book Chapter
  - Conference Papers
  - Conference Proceedings
  - Course Material
  - Data Set
  - Journal Article
  - Technical Reports
• If your work isn’t any of these, select “other” and use the “Specify Type” field.
• **Material Type** is required.
• **Publication Status** options include:
  - In Press
  - Published
  - Unpublished
• **Publication Status** is optional
• If you need an additional instance of a field, click the green plus next to it.
How to Upload Items:

**Step 3: Upload Files (optional)**

Attach File(s)
- Text
- Audio
- Video
- Etc.

Step 3 of 3: Upload Files (Optional)

Upload the related files for your new item. You can also provide labels for each file, once they are uploaded.

Add a new item for this package:

SELECT FILES

Once all files are uploaded, press SUBMIT to finish this item.
How do I make changes to my item?

- Log in to myUFDC
- Open item
  - “View all my submitted items”
  - Use unique identifier after the base: http://ufdc.ufl.edu/

- Three areas to make changes
  - Manage Files
  - Edit Behaviors
  - Edit Metadata

Navigate to these selections using the gray bar at top, or drop down from “Manage” tab.
Manage Downloads

- Lets you work with the files of a record.
- Lets you add additional files.
- Lets you pick how item is called (Label) on download screen.

List of accepted file types at bottom of page.
If you are submitting individual pages (e.g. TIFFs) there is a link at top of the page.
Behaviors

Describes the how the item acts.

Aggregation – collections it belongs to

Wordmark – logo on the page

Serial Hierarchy – Used to describe levels of serial items.
**Metadata: Preview**

Allows you to see what the record looks like before you save any changes you’ve made to the metadata.

---

<table>
<thead>
<tr>
<th>Material Information</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title:</strong></td>
<td>Test For Class</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Physical Description:</strong></td>
<td>Article</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Creator:</strong></td>
<td>Shorey, Christine</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Subjects</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Genre:</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Abstract:</strong></td>
</tr>
<tr>
<td><strong>Acquisition:</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Record Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Source Institution:</strong></td>
</tr>
<tr>
<td><strong>Holding Location:</strong></td>
</tr>
<tr>
<td><strong>Rights Management:</strong></td>
</tr>
<tr>
<td><strong>Resource Identifier:</strong></td>
</tr>
</tbody>
</table>
Metadata: Material Information

Describes the original work.

Some fields may have been captured on original form: Title, Creator, Resource type, Publisher Name, Publisher Location and Publication date

Other fields are new: Language, Donor, Manufacturer Name, Manufacturer Location, Copyright Year, Edition
Metadata: Subjects and Notes
Describes the content.
Some fields may have been captured on original form: Abstract, Note
Some fields are filled in automatically: Acquisition Note
Other fields are new: Subject Keywords, Genre, Temporal Coverage, Spatial Coverage, Coordinates, Target Audience
**Metadata:**

**Record Information**

Describes the record.

Most of the Internal Record fields are filled in automatically.

**Rights Management:** Tells the user who owns the rights to the material, and how they can use it. A default is in place for self-submitted items, but you can change it to a Creative Commons statement, or other UF Rights Statement.
Metadata: Rights Management

Three Choices
- Default,
- UF Specific Rights Statement,
- Creative Commons License
Default Rights Statement

Copyright Creator/Rights holder. Permission granted to University of Florida to digitize and display this item for non-profit research and educational purposes. Any reuse of this item in excess of fair use or other copyright exemptions requires permission of the copyright holder.

• Mirrors language in Grant of Permissions
• Indicates that Copyright is owned by the listed Creator/Author
• Allows for Fair Use by others of works uploaded into the IR
UF Specific Rights Statements

**Use by Anyone**

- **UF Copyright** – Items where UF is the copyright Holder (e.g. official photos and documents)
- **With Permission** – copyright held by someone other than the depositor and express written permission given to digitize item
- **Orphan Work** – item protected by copyright but copyright holder unknown or unable to be contacted; item is uploaded under a claim of fair use
- **Federal Government Document** – work is authored by federal government agency or employee of federal government and by law is not protected by copyright
- **Public Domain Presumed** – term of copyright protection has presumably expired

**Internal FOR Project Use Only**

- **RDS Statements** – these are special statements for use by Retrospective Dissertation Scanning Project
- **Dissertation/Thesis** – this statement is for current dissertations and theses that are scanned by the library with permission of their authors.
- **Others** – if you are working on a digitization project, you can request a rights management statement tailored to your needs
## Creative Commons Licenses

### Table of Creative Commons Licenses

<table>
<thead>
<tr>
<th>License</th>
<th>Copy &amp; Publish</th>
<th>Attribution Required</th>
<th>Commercial Use</th>
<th>Modify &amp; Adapt</th>
<th>Change License</th>
</tr>
</thead>
<tbody>
<tr>
<td>COPYRIGHT</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>PUBLIC DOMAIN</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>CC BY</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>CC BY-SA</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>CC BY-ND</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>CC BY-NC</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>CC BY-NC-SA</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>CC BY-NC-ND</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

*Disclaimer: This document by its nature cannot be comprehensive and is provided to assist clients to clarify and identify legal issues in which they should seek legal advice. Please consult professional legal staff for advice specific to your situation.*

[https://creativecommons.org/share-your-work/](https://creativecommons.org/share-your-work/)
Who owns the copyright to what I post in the IR@UF?

• You are the copyright holder for your works if you have not assigned or transferred your rights to another person or entity, such as a publisher or agency.

• Submitting items to the IR@UF does not transfer rights to your work.

• When you submit items to the IR@UF, you grant us permission to host and display your work.
  - You can use works submitted to the IR@UF in other ways e.g. publication

• If researchers want to use your work beyond the scope of fair use (or other exceptions allowed by law), they will be directed to contact you for permission.
Can I put my published work in the IR@UF?

It depends on your publishing agreement.

• In some, you retain rights to share your work (either the final/published version, or an earlier version) in an institutional repository.

• Check the publishing agreement, if you kept a copy.

• If not, you may be able to determine what rights you retained by looking up the journal in SHERPA/RoMEO (http://www.sherpa.ac.uk/romeo/index.php).
Your Scholarly Legacy

• Share important research that would otherwise not be, and expand knowledge in your field
• Provide pre-prints so your research reaches a broader audience base
• Show growth in your research over time
• Archive more ephemeral moments in your research – conference posters, white papers, lab procedures
• A search by your name will pull all items where you’re listed as creator, both those you’ve loaded, and those co-authors loaded
• Great for CVs, resumes and T&P packets
• When you leave UF, your legacy will live on in our digital collections
QUESTIONS?
This slide show can be found in the IR@UF: http://ufdc.ufl.edu/IR00010468/00001