

Adding publication data to ORCA, the institutional repository for research outputs

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Overview of ORCA

ORCA – Online Research @ Cardiff – is the digital repository of all research outputs by Cardiff University staff

Item Types we accept are journal articles, books, book sections, monographs (i.e. reports and working papers), conference papers and workshop items, patents, compositions, research-level theses (added by ORCA team only), images, video and audio files.

The ORCA team

The ORCA team consists of Tracey Andrews, Sonja Haerkoenen, Louise Harrington and Eirian Kelly. They are primarily responsible for the following areas

Tracey

Overall management and long-term strategy of ORCA.

Email: AndrewsT@cf.ac.uk

Working Hours: Monday, Tuesday: 9.30-3; Wednesday: 9.30-5.30; Thursday: 9.30-2

Sonja

Project Manager for the ORCA REF Project running until end of Feb 2013: responsible for overseeing the bulk upload of bibliographic data from the schools into ORCA, the technical development of ORCA for REF, advocating the use of ORCA and Manage My Publications to academic schools and research centres.

Email: HaerkoenenS@cf.ac.uk

Phone: 70965 (Park Place) and 76123 (McKenzie House)

Working Hours: Monday-Friday 9-5

Louise

Responsible for managing all items in review area and for training and supporting all ULS staff working on ORCA items. Also primarily responsible for manning 'Ask an ORCA Expert live'.

Email HarringtonLE1@cf.ac.uk

Working Hours: Monday-Friday 9-5

Eirian

General ORCA support with special responsibility for the upload of all data going into ORCA via EndNote files.

Email KellyEM@cf.ac.uk

Working Hours: Monday-Wednesday 8.30-4.00

These are our primary areas of responsibility, but if the first point of contact is not available, any other member of the team will be able to assist you. You can also contact us on our general email address orca@cardiff.ac.uk or by phoning 76123.

Depositing an item via the ORCA user area:

- Go to the ORCA web page <http://orca.cf.ac.uk/>.
- Click on **User Area Login** and enter your network username and password.
- You are now in your personal area. Click on **New Item**.

Accessing the Review Area

- To access the Review Area you must have been given admin rights to ORCA. To be given these contact Louise.
- Go to the ORCA web page <http://orca.cf.ac.uk/>.
- Click on **User Area Login** and enter your network username and password.
- Select the **Review** tab on the horizontal tool bar at the top of the screen (fourth from the left)

ADDING NEW ITEMS

First steps: checking existing items in ORCA

Before starting to enter any deposits, please look at the following tips:

Have 3 ORCA tabs open

- a. Your 'Manage Deposits' screen where you will be entering and editing records
- b. The Cardiff Author Browse screen. You access this by going to Menu on the left hand side of the home page, select 'Browse' and then 'Cardiff Authors' or go directly to it via <http://orca.cf.ac.uk/view/cardiffauthors/>. This brings up an A-Z of all Cardiff authors with entries in ORCA.
Also check to see if the author has deposited in ORCA, and how their name is presented, e.g. Harper, Paul or Harper, Paul Robert. Please stick to the same one currently on ORCA for consistency.
- c. The Advanced Search screen. You access this by going to 'Search' and selecting 'Click here for an advanced search.'
Before entering any data, please check that it is not already in ORCA. Use the Advanced Search screen or the Author Browse.
Type in, or copy and paste, the title of the item into the 'Title' field.
If it is already in ORCA, it will bring up the relevant record.

Item type 1: Journal articles

- Find and open the publisher's page for the specific article in a new tab
- If the article has a DOI, use the Portal to submit your item: see page 20.
- (A DOI – Digital Object Identifier – is a unique number for a specific journal article and occasionally book sections, e.g. [10.1080/13691050802380974](https://doi.org/10.1080/13691050802380974))

1. Type The default item type is *Article*, so just click on **Next**.

2. Upload if you are currently only uploading bibliographic data just click on **Next**. This is where you would attach a full-text file if relevant. To attach full-text, click on the 'Browse' button in the File tab. Select the correct file from your file space, and click 'Upload'.

When the item is uploaded, on the dropdown menu next to 'Content' select the version type (e.g. Published), select the 'Format' type (e.g. PDF), who the file should be visible to (e.g. anyone) and enter any embargo dates.

Then click on the 'Update Metadata' button. Then click 'next'.

3. Details

(Fields with a star inside an orange circle are compulsory).

Field to be checked/completed	Format
Title	<ul style="list-style-type: none"> ○ Copy and paste the title of the article. ○ Capitalise the first letter, and any proper names. ○ Don't put a full stop at the end of the article title. Ensure that diacritics, hyphens, formulas etc. are displayed correctly. ○ Depending on the type of article, please add the following as appropriate at the end of the title: [Abstract], [Letter], [Editorial], [Erratum] etc.
Abstract	Copy and paste the abstract. Don't worry if the line breaks look a bit odd – it looks fine when live in ORCA.
Creators (this means the authors of the article)	<ul style="list-style-type: none"> ○ Add the authors in the order they appear on the reference. ○ If an author is Cardiff staff, the details should be completed automatically including email address and ID once you start typing the name into the Creator field (auto-complete is also set up for the Journal Title field). ○ If they are not coming up on auto-complete, try taking out a few more letters of the first name, and that usually does the trick. ○ If that doesn't work, just highlight them as CARDIFF in the first name field so that the review team can try to find the details. ○ Use the Cardiff Author Browse in ORCA to ensure you add the correct form of the author's name - if their previous entries in ORCA have used their middle name(s) or the full version of the first name (e.g. Jonathan instead of Jon, Andrew instead of Andy) - please use the ORCA version in order for consistency.

	<ul style="list-style-type: none"> ○ If an author has a common name and you are unsure if it is the same one mentioned on the Auto-complete, investigate, e.g. look on the School web pages and see if there is a list of their publications. ○ Any non-Cardiff authors only require Surname and First name filled in (ignore email address and ID number). Ensure that there is a full stop and space between initials, e.g. H. T. for Huw Thomas. If you need to add more authors, click the 'more input rows' button ○
Refereed	Select 'Yes'.
Status	Select 'Published' if the item has been published in a print or an online journal. If the publisher's page says "online first" or "Online before print", and has no issue and page details, select 'In Press'.
Journal or publication title	<p>Capitalise each word. This field is auto-completed so if the title is already in ORCA it will find the details and add the ISSN.</p> <ul style="list-style-type: none"> ○ Please use the full title of the journal, not an abbreviated title, e.g. British Medical Journal rather than BMJ. ○ Please change any capitalised titles to title case e.g. Journal of Pharmacology rather than JOURNAL OF PHARMACOLOGY.
ISSN	<p>Add ISSN with a dash in the middle (get it from journal homepage if not on PDF), e.g. 1545-5955</p> <ul style="list-style-type: none"> ○ If you have the option of print and online ISSN's, choose print.
Publisher	The Publisher may appear automatically, if not add it. Add publisher's name only (not place of publication). You can get the publisher name from journal homepage if not on PDF.
Official URL	<p>Add the URL which takes you to the publisher's page about the article with the abstract on it.</p> <p>With the URL, link to the abstracts page rather than the PDF, just in case the guest trying to access that URL doesn't have a subscription,</p>
Volume, Number, Page range	<p>Add volume, issue (number – if applicable) and page range.</p> <p>Sometimes, online articles only have a number, not a page range - just put that number into the start page field and leave the end page field blank.</p>
Date	Just add the publication year. If the month and date is mentioned, this can be added too.
Date type	<p>Select from 'Publication' (date the item was published), 'Submission' (date the item was submitted to the journal for publication), 'completion' (date item was completed) and 'unspecified' (details are unknown).</p> <p>You are most likely going to be choosing 'Publication'</p>
DOI – digital object identifier	Add the DOI (get this from article page). Just put down number starting with 10... (not http://doi...).
Related URL	<p>This should be used sparingly if at all.</p> <ul style="list-style-type: none"> ○ The rule of thumb is that if an unofficial but related URL adds something extra to the record you have entered, then please

	<p>use it.</p> <p>If you are unsure, leave blank. This field does not need to be entered.</p>
Funders (optional)	<p>Add the names of any funding bodies if relevant e.g. ESRC. If there are more than one funding bodies, click the 'more input rows' button.</p> <p>If you are unsure, leave blank. This field does not need to be entered.</p>
Projects (optional)	<p>Add the names of any project associated with this record.</p> <p>If you are unsure, leave blank. This field does not need to be entered.</p>
Uncontrolled Keywords	<p>Click on the plus sign next to the uncontrolled keywords tab. Copy and paste any keywords given into the box. If necessary change the layout so that it is a list of words separated by semi-colons or commas, e.g. library science; information management; libraries.</p> <p>Please note that you do not have to provide any keywords yourself.</p>
Language other than English	<p>Select the appropriate option if the article was not written in English. If the language is not on the list provide, select 'UNSPECIFIED' and let us know so we can add the new language to ORCA.</p>
Additional Information	<p>This is for any extra information not covered in the fields above but that add context to the record e.g. this article was first presented as a paper at a conference.</p> <p>Please be aware that this field will display publically. If you want to include data not to be displayed please use the 'Comments and Suggestions' field. Contents of this field are only visible to Repository staff.</p>

- Click on **Next** once you have completed all the relevant fields.

4. Subjects and Schools

- You can add a subject if you find it listed, but these details can also be completed by the ORCA team.
- Add as many as are relevant. If you are unsure, go with the broadest scheme i.e. B Philosophy (General) or leave out.
- Add your Cardiff University School – for joint research outputs please add all the relevant Schools and Research Centres that apply.
- Click on **Next**.

5. Deposit Click on **Deposit item now**.

The item will then be checked by the ORCA team. You will receive an email when it has been made available on live ORCA.

Item type 2: Books

Find details of this item on the publisher's webpages and keep these open in a second tab.

Search Tips: if you cannot locate a publisher's page for the item (such as Routledge or Palgrave Macmillan), try WorldCat or Google Books as they can give useful info such as number of pages. You can also try Voyager as we could hold a copy in the library and that will give you all the bibliographic details. Amazon is also a good source for ISBNs and page numbers

1. Type Select the *book* item type. Click on **Next**.

2. Upload Just click **Next**

3. Details

Field to be checked/completed	Format
Title	Copy and paste the title of the book. Capitalise the first letter, and any proper names. Ensure that diacritics, hyphens, formulas etc. are displayed correctly.
Abstract	If there is an summary available from the official webpage, paste it in.
Creators (this means the author(s) of the book section)	<ul style="list-style-type: none"> ○ Add the authors in the order they appear on the reference. ○ If an author is Cardiff staff, the details should be completed automatically including email address and ID once you start typing the name into the Creator field (auto-complete is also set up for the Journal Title field). ○ If they are not coming up on auto-complete, try taking out a few more letters of the first name, and that usually does the trick. ○ If that doesn't work, just highlight them as CARDIFF in the first name field so that the review team can try to find the details. ○ Use the Cardiff Author Browse in ORCA to ensure you add the correct form of the author's name - if their previous entries in ORCA have used their middle name(s) or the full version of the first name (e.g. Jonathan instead of Jon, Andrew instead of Andy) - please use the ORCA version in order for all entries to be linked to the same author record. ○ If an author has a common name and you are unsure if it is the same one mentioned on the Auto-complete, investigate, e.g. look on the School web pages and see if there is a list of their publications. ○ Any non-Cardiff authors only require Surname and First name filled in (ignore email address and ID number). Ensure that there is a full stop and space between initials, e.g. H. T. for Huw Thomas. If you need to add more authors, click the 'more input rows' button
Corporate Creators	This is used for collaborative groups of authors or for

	corporations or institutions: Welsh Government for example.
Editors	If applicable, add the names of the editors of the book using the same formatting principles as creators above
Status	Select 'Published' or 'In Press' if the publisher's page states that it is yet to be published
ISBN	Enter this as one continuous string, e.g.: 0136492118. 13 digit ISBNs are preferable, but 10 digit is OK if it is the only one available.
Publisher	Enter name of publisher, e.g. Cambridge University Press.
Place of Publication	Add place of publication to this field, not publisher's field. Add city only for British or European publication e.g. London, Oxford, Cambridge, Berlin, Lisbon. If an American publisher, use the format Dallas, TX; Cambridge, MA.
Official URL	If you have found it, add the URL which takes you to the publisher's page about the book with the abstract on it.
Number of pages	Enter this info if it is available. You can usually find this info on WorldCat or Google Books.
Series name and vol	Enter these if they are applicable. This is used when a book is part of an overarching series, e.g. Cambridge Companion to Shakespeare Studies
Date	Add the publication year. If the month is mentioned, this can be added too.
Date type	Select from 'Publication' (date the book was published), 'Submission' (date the book for publication), 'completion' (date item was completed) and 'unspecified' (details are unknown). You are most likely going to be choosing 'Publication'
Related URL	This should be used sparingly if at all. The rule of thumb is that if an unofficial but related URL adds something extra to the record you have entered, then please use it. Please don't link to Amazon or Google Books. If you are unsure, leave blank. This field does not need to be entered.
Funders	Add the names of any funding bodies if relevant e.g. ESRC. If there are more than one funding bodies, click the 'more input rows' button. If you are unsure, leave blank. This field does not need to be entered.
Projects	Add the names of any projects associated with this record. If you are unsure, leave blank. This field does not need to be entered.
Uncontrolled Keywords	Click on the plus sign next to the uncontrolled keywords tab. Copy and paste any keywords given into the box. If necessary change the layout so that it is a list of words separated by semi-colons or commas, e.g. library science; information management; libraries. Keywords are not as normal as for journal articles but some publisher's webpages do include them. Please note that you do not have to produce any keywords yourself.
Language other than English	Select the appropriate option if the book was not written in English. If the language is not on the list provide, select

	'UNSPECIFIED' and let us know so we can make changes to ORCA.
Additional Information	This is for any extra information not covered in the fields above but that adds context to the record. Please be aware that this field will display publically. If you want to include data not to be displayed please use the 'Comments and Suggestions' field. Contents of this field are only visible to Repository staff.

- Click on **Next** once you have completed all the relevant fields.

4. Subjects and Schools

- Add the subject if available. Add as many as are relevant. If you are unsure, go with the broadest scheme i.e. B Philosophy (General) or leave out.
-
- Add your Cardiff University School – for joint research outputs please add all the relevant Schools and research centres that apply.
- Click on **Next**.

5. Deposit Click on **Deposit item now**.

Item type 3: Book section

These are chapters in edited books or papers in published conference proceedings.

1. Type Select the item type *book section*. Click on **Next**.

2. Upload Just click **Next**.

3. Details

Field to be checked/completed	Format
Title	Copy and paste/type in the title of the book chapter. Capitalise the first letter, and any proper names. Ensure that diacritics, hyphens, formulas etc. are displayed correctly.
Abstract	There is unlikely to be an abstract/summary available, but if there is, paste it in. It should be an abstract of the book chapter, not the whole book.
Creators (the authors of the book section)	<ul style="list-style-type: none"> ○ Add the authors in the order they appear on the reference. ○ If an author is Cardiff staff, the details should be completed automatically including email address and ID once you start typing the name into the Creator field (auto-complete is also set up for the Journal Title field). ○ If they are not coming up on auto-complete, try taking out a few more letters of the first name, and that usually does the trick. ○ If that doesn't work, just highlight them as CARDIFF in the first name field so that the review team can try to find the details. ○ Use the Cardiff Author Browse in ORCA to ensure you add the correct form of the author's name - if their previous entries in ORCA have used their middle name(s) or the full version of the first name (e.g. Jonathan instead of Jon, Andrew instead of Andy) - please use the ORCA version in order for all entries to be linked to the same author record. ○ If an author has a common name and you are unsure if it is the same one mentioned on the Auto-complete, investigate, e.g. look on the School web pages and see if there is a list of their publications. ○ Any non-Cardiff authors only require Surname and First name filled in (ignore email address and ID number). Ensure that there is a full stop and space between initials, e.g. H. T. for Huw Thomas. If you need to add more authors, click the 'more input rows' button
Editors	Add the name(s) of the editor(s) in this field, format as above.
Refereed	Select 'Yes'
Status	Select 'Published' or In Press if the publisher's page states that it is yet to be published
Page range	Insert the page ranges

Title of book	Enter the title of the book. For conference papers, add <i>Proceedings of...</i> if the title does not make this clear, and add location and event dates, e.g. <i>Proceedings of the 6th International Conference on Climate Change, Hamburg, Germany, 5-7 April 2011.</i>
Vol	Enter the volume number of the book if applicable
Place of Publication	Enter the place of publication here, not in the publisher field Add city only for British or European publication e.g. London, Oxford, Cambridge, Berlin, Lisbon. If an American publisher, use the format Dallas, TX; Cambridge, MA.
Publisher	Enter name of publisher, e.g. Cambridge University Press.
Number of pages	Enter the total number of pages of the book, if this information is available
DOI	Book sections occasionally have DOIs. Enter if applicable.
Series name and vol	Enter these if they are applicable
ISBN	Enter this as one continuous string, e.g. 0136492118 13 digit ISBNs are preferable, but 10 digit is OK if it is the only one available.
Date	Add the publication year. If the month is mentioned, this can be added too.
Date type	Select 'Publication' if published.
Official URL	If available. add the URL which takes you to the publisher's page about the book
Related URL	This should be used sparingly if at all. The rule of thumb is that if an unofficial but related URL adds something extra to the record you have entered, then please use it. Please don't link to Amazon or Google Books. If you are unsure, leave blank. This field does not need to be entered.
Funders	Add the names of any funding bodies if relevant e.g. ESRC, Wellcome Trust. If there are more than one funding bodies, click the 'more input rows' button. If you are unsure, leave blank. This field does not need to be entered.
Projects	Add the name of any projects. If you are unsure, leave blank. This field does not need to be entered.
Uncontrolled Keywords	Click on the plus sign next to the uncontrolled keywords tab. Copy and paste any keywords given into the box. If necessary change the layout so that it is a list of words separated by semi-colons or commas, e.g. library science; information management; libraries. Keywords are not as normal as for journal articles but some publisher's webpages do include them. Please note that you do not have to produce any keywords yourself.
Language other than English	Select the appropriate option if the book/article was not written in English. If the language is not on the list provide, select 'UNSPECIFIED' and let us know so we can make the relevant changes to ORCA.
Additional Information	This is for any extra information not covered in the fields above but that adds context to the record.

	Please be aware that this field will display publically. If you want to include data not to be displayed please use the 'Comments and Suggestions' field. Contents of this field are only visible to Repository staff.
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- Click on **Next** once you have completed all the relevant fields.

4. Subjects and Schools

- Add the subject if available. Add as many as are relevant. If you are unsure, go with the broadest scheme i.e. B Philosophy (General) or leave blank.
- Add your Cardiff University School – for joint research outputs please add all the relevant Schools and Research Centres that apply.
- Click on **Next**.

5. Deposit Click on **Deposit item now**.

Item type 4: Conference or workshop item.
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Suggested search tip: Google the name of the conference for more details, if you cannot find anything under the title of the paper.

Note: any conference papers that have been officially published in a collection of proceedings, please enter these as Book Sections (as long as you have ISBNs and/or page numbers – anything that points to proof of official publication)

1. Type Select the item type *Conference or workshop item*. Click on **Next**.

2. Upload If you are only updating bibliographic data, just click **Next**.

This is where you would attach a full-text file if relevant.
To attach full-text, click on the 'Browse' button in the File tab. Select the correct file from your file space, and click 'Upload'.

When the item is uploaded, on the dropdown menu next to 'Content' select the version type (e.g. Published), select the 'Format' type (e.g. PDF), who the file should be visible to (e.g. anyone) and enter any embargo dates.

Then click on the 'Update Metadata' button. Then click 'next'.

3. Details

Field to be checked/completed	Format
Title	Copy and paste/type in the title of the conference item.. Capitalise the first letter, and any proper names. Ensure that diacritics, hyphens, formulas etc. are displayed correctly.
Abstract	If there is an abstract available, paste it in.
Presentation Type	Select one of paper, lecture, speech, poster, keynote, other
Creators (these are the authors of the paper/keynote/poster etc)	<ul style="list-style-type: none"> ○ Add the authors in the order they appear on the reference. ○ If an author is Cardiff staff, the details should be completed automatically including email address and ID once you start typing the name into the Creator field (auto-complete is also set up for the Journal Title field). ○ If they are not coming up on auto-complete, try taking out a few more letters of the first name, and that usually does the trick. ○ If that doesn't work, just highlight them as CARDIFF in the first name field so that the review team can try to find the details. ○ Use the Cardiff Author Browse in ORCA to ensure you add the correct form of the author's name - if their previous entries in ORCA have used their middle name(s) or the full version of the first name (e.g. Jonathan instead of Jon, Andrew instead of Andy) - please use the ORCA version in order for all entries to be linked to the same author record. ○ If an author has a common name and you are unsure if it is the same one mentioned on the Auto-complete,

	<p>investigate, e.g. look on the School web pages and see if there is a list of their publications.</p> <ul style="list-style-type: none"> ○ Any non-Cardiff authors only require Surname and First name filled in (ignore email address and ID number). Ensure that there is a full stop and space between initials, e.g. H. T. for Huw Thomas. If you need to add more authors, click the 'more input rows' button
Refereed	Select 'No'
Status	Select unpublished – for conference papers that have been published in proceedings, and you can find a record of the published proceedings, choose item type Book Section.
Date	Enter date of publication, submission or completion
Date type	Choose completion.
Page range	Insert the page ranges if applicable
Official URL	Add the URL which takes you to the official conference page, if available
Event Title	Enter the title of the event
Event Type	Choose conference, workshop or other
Event location	Enter location – city and country e.g. Cardiff, UK
Event Dates	e.g. 15-17 April 2007
Uncontrolled Keywords	<p>Click on the plus sign next to the uncontrolled keywords tab. Copy and paste any keywords given into the box. If necessary change the layout so that it is a list of words separated by semi-colons and commas, e.g. library science; information management; libraries.</p> <p>Please note that you do not have to produce any keywords yourself</p>
Language other than English	Select the appropriate option if the item was not written in English. If the language is not on the list provide, select 'UNSPECIFIED' and let us know so that we can add that language to ORCA.
Additional Information	<p>This is for any extra information not covered in the fields above but that adds context to the record, e.g. this conference paper later appears as an article in Journal of X Vol 33, issue 5.</p> <p>Please be aware that this field will display publically. If you want to include data not to be displayed please use the 'Comments and Suggestions' field. Contents of this field are only visible to Repository staff.</p>

4. Subjects and Schools

- Add the subject if available. Add as many as are relevant. If you are unsure, go with the broadest scheme i.e. B Philosophy (General) or leave blank.
- Add your Cardiff University School – for joint research outputs please add all the relevant Schools that apply.
- Click on **Next**.

5. Deposit Click on **Deposit item now**.

Item Type 5: Monographs

ORCA defines this as technical report, project report, documentation, manual, working paper or discussion paper. It is not a published book by a single author: this goes in as a book.

An example of a monograph is here:

http://learningaswork.cf.ac.uk/outputs/Working_Paper_15.pdf

1. Type Choose Monograph and click on **Next**.

2. Upload if you are currently only uploading bibliographic data just click on **Next**.

This is where you would attach a full-text file if relevant.

To attach full-text, click on the 'Browse' button in the File tab. Select the correct file from your records, and click 'Upload'.

When the item is uploaded, on the dropdown menu next to 'Content' select the version type (e.g. Published), select the 'Format' type (e.g. PDF), who the file should be visible to (e.g. anyone) and enter any embargo dates.

Then click on the 'Update Metadata' button. Then click 'next'.

3. Details.

Items with a star inside an orange circle next to them are compulsory.

Field to be checked/completed	Format
Title	Copy and paste/type in the title of the monograph. Capitalise the first letter, and any proper names. Ensure that diacritics, hyphens, formulas etc. are displayed correctly.
Abstract	If there is an abstract/summary available, paste it in.
Monograph Type	Choose from: <ul style="list-style-type: none"> ○ Technical report ○ Project report ○ Documentation ○ Manual ○ Working paper ○ Discussion paper ○ Other If you are unsure, choose 'other'.
Creators (the authors of the monograph)	<ul style="list-style-type: none"> ○ Add the authors in the order they appear on the reference. ○ If an author is Cardiff staff, the details should be completed automatically including email address and ID once you start typing the name into the Creator field (auto-complete is also set up for the Journal Title field). ○ If they are not coming up on auto-complete, try taking out a few more letters of the first name, and that usually does the trick. ○ If that doesn't work, just highlight them as CARDIFF in the first name field so that the review team can try to find the details.

	<ul style="list-style-type: none"> ○ Use the Cardiff Author Browse in ORCA to ensure you add the correct form of the author's name - if their previous entries in ORCA have used their middle name(s) or the full version of the first name (e.g. Jonathan instead of Jon, Andrew instead of Andy) - please use the ORCA version in order for all entries to be linked to the same author record. ○ If an author has a common name and you are unsure if it is the same one mentioned on the Auto-complete, investigate, e.g. look on the School web pages and see if there is a list of their publications. ○ Any non-Cardiff authors only require Surname and First name filled in (ignore email address and ID number). Ensure that there is a full stop and space between initials, e.g. H. T. for Huw Thomas. If you need to add more authors, click the 'more input rows' button
Corporate creators	This is used for collective bodies responsible for some of the work: Welsh Government for example.
Editors	Add the name(s) of the editor(s) in this field, format as creators above.
Status	Select 'Published' or 'In Press' if the publisher's page states that it is yet to be published
Place of Publication	Enter the place of publication here, not in the publisher field. Add city only for British or European publication e.g. London, Oxford, Cambridge, Berlin, Lisbon. If an American publisher, use the format Dallas, TX; Cambridge, MA.
Publisher	Enter name of publisher, e.g. Cambridge University Press.
Number of pages	Insert the page ranges. You can find this information on WorldCat or Google Books
Date	Add the publication year. If the month is mentioned, this can be added too.
Date type	Select 'Publication' if published.
Official URL	If available, add the URL which takes you to the publisher's page about the monograph or the monograph itself.
Related URL	This should be used sparingly if at all. The rule of thumb is that if an unofficial but related URL adds something extra to the record you have entered, then please use it. If you are unsure, leave blank. This field does not need to be entered
Funders	Add the names of any funding bodies if relevant e.g. ESRC, Wellcome Trust If there are more than one funding bodies, click the 'more input rows' button. This field does not need to be entered
Projects	Add the names of any projects involved in the work.. This field does not need to be entered
Uncontrolled Keywords	Click on the plus sign next to the uncontrolled keywords tab. Copy and paste any keywords given into the box. If necessary change the layout so that it is a list of words separated by semi-colons and commas, e.g. library science; information

	<p>management; libraries.</p> <p>Keywords are not as normal as for journal articles but some publisher's webpages do include them.</p> <p>Please note that you do not have to produce any keywords yourself.</p>
Language other than English	Select the appropriate option if the book/article was not written in English. If the language is not on the list provide, select 'UNSPECIFIED' and let us know so that we can make changes to ORCA.
Additional Information	This is for any extra information not covered in the fields above but that adds context to the record. Please be aware that this field will display publically. If you want to include data not to be displayed please use the 'Comments and Suggestions' field. Contents of this field are only visible to Repository staff.

4. Subjects and Schools

- Add the subject if available. Add as many as are relevant. If you are unsure, go with the broadest scheme i.e. B Philosophy (General)
- Add your Cardiff University School – for joint research outputs please add all the relevant Schools that apply.
- Click on **Next**.

5. Deposit Click on **Deposit item now**.

Item type 6: Patents

These can include patents awarded and those under application

We will restrict access if they are under application so this needs to be made clear in the submission.

1. Type Choose Monograph and click on **Next**.

2. Upload if you are currently only uploading bibliographic data just click on **Next**

3. Details

Field to be checked/completed	Format
Title	Copy and paste/type in the title of the patent. Capitalise the first letter, and any proper names. Ensure that diacritics, hyphens, formulas etc. are displayed correctly.
Abstract	If there is an abstract or summary available, paste it in.
Creators (these are the authors of the patent)	<ul style="list-style-type: none"> ○ Add the authors in the order they appear on the reference. ○ If an author is Cardiff staff, the details should be completed automatically including email address and ID once you start typing the name into the Creator field (auto-complete is also set up for the Journal Title field). ○ If they are not coming up on auto-complete, try taking out a few more letters of the first name, and that usually does the trick. ○ If that doesn't work, just highlight them as CARDIFF in the first name field so that the review team can try to find the details. ○ Use the Cardiff Author Browse in ORCA to ensure you add the correct form of the author's name - if their previous entries in ORCA have used their middle name(s) or the full version of the first name (e.g. Jonathan instead of Jon, Andrew instead of Andy) - please use the ORCA version in order for all entries to be linked to the same author record. ○ If an author has a common name and you are unsure if it is the same one mentioned on the Auto-complete, investigate, e.g. look on the School web pages and see if there is a list of their publications. ○ Any non-Cardiff authors only require Surname and First name filled in (ignore email address and ID number). Ensure that there is a full stop and space between initials, e.g. H. T. for Huw Thomas. If you need to add more authors, click the 'more input rows' button
Date	Enter date of publication (if patent has been approved) and submission (if a request for application has been submitted).
Date type	Choose publication or submission.
Official URL	Add the URL which takes you to the official patent page, if

	available
Patent Applicant	The name of the person, group or institution who are applying for or have registered the patent e.g. Cardiff University.
DOI	Enter the Patent unique identifier.
Funders	Add the names of any funding bodies if relevant e.g. ESRC, Wellcome Trust If there are more than one funding bodies, click the 'more input rows' button. If you are unsure, leave blank. This field does not have to be added.
Projects	Add the names of any projects associated with this work. If you are unsure, leave blank. This field does not have to be added.
Uncontrolled Keywords	Click on the plus sign next to the uncontrolled keywords tab. Copy and paste any keywords given into the box. If necessary change the layout so that it is a list of words separated by semi-colons and commas, e.g. library science; information management; libraries. Please note that you do not have to provide any keywords yourself.
Language other than English	Select the appropriate option if the item was not written in English. If the language is not on the list provide, select 'UNSPECIFIED' and let us know so that we can change this in ORCA.
Additional Information	This is for any extra information not covered in the fields above but that adds context to the record. Please be aware that this field will display publically. If you want to include data not to be displayed please use the 'Comments and Suggestions' field. Contents of this field are only visible to Repository staff.

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- Add your Cardiff University School – for joint research outputs please add all the relevant Schools that apply.
- Click on **Next**.

5. Deposit Click on **Deposit item now**.

7. Depositing and editing an item using the DOI tab via the Cardiff Portal:

- Go to the Portal <http://portal.cf.ac.uk/> and click on **Research**.
- In the **Manage My Publications** portlet, stay on the **DOI deposit** tab
- Paste the DOI into the box and click the **Get record** button.
- Details of the article will appear.
- Click the **Submit** button.
- You should have a message saying 'Your item has been submitted. You will be notified when your item has been reviewed'
- If you get a 'Failed' message, trying logging in and out of the portal.

To edit the item:

You will need to have editing rights for ORCA. Please contact Louise to arrange this.

- Go to the ORCA homepage
- Log in to the User Area Login, and select Review from the horizontal menu at the top of the screen.
- You will now see the item you have just deposited.
- Click on the edit icon (pen and paper) to the right to amend and add to the item details.
- When you have finished editing, make sure you click 'Save and Exit'.
- The item will now remain in Review until a member of the ORCA team checks it.
- You will then receive an automatic email from ORCA to say that your item has been made live.
- You may receive an ORCA email entitled 'Problem with Submission'. This is usually because it is a duplicate and we have deleted your item. Occasionally we may return an item to your work area asking for more information.

If you have any questions or need advice, please contact us on ext: 76123 or email:
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