Intrallect intraLibrary 3.3: Getting Started- Uploading and Cataloguing Resources

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1. Contributing Resources to the Library: Introduction

Users who have *contributor* rights to use intraLibrary may add resources to the library. If you have contributor rights then you will see a *Work Area* option near the top of your screen.

If you think you should have contributor rights to the library and you *don't* see this view, contact your local administrator.

IntraLibrary allows administrators to set up *workflows* involving any number of different processes and people. This means that contributing resources to the library can be very basic, with one person doing the uploading, cataloguing and publishing of a resource, or more complex, with a number of different people performing different actions at different stages. The kinds of actions that can be carried out in a workflow when contributing a resource include:

- uploading
- cataloguing
- overwriting the resource with a new version
- linking the resource to other resources that it is related to
- adding copyright and conditions of use information
- quality checking the resource
- sending the resource to a subject specialist for extra cataloguing
- deleting.

In addition, there may be a number of collections within your library that you can contribute to, and you may belong to one or more groups that have access to different workflows and collections. All of this will be set up by your administrator, and they should provide you with specific instructions. Clearly, the number of possible permutations is vast. This guide therefore takes a very simple workflow as an example to illustrate the main things you will need to understand and do when adding a resource to the library:

- **Uploading resources:** see below under section 2 Adding a Resource to the Library.
- **Cataloguing and classifying resources (creating metadata):** see below under section 3 Cataloguing a Resource.
- **Updating resources:** see below under section 4 Updating a Resource with a New Version.
- **Linking related resources:** see below under section 5 Linking Related Resources.
- **Adding copyright and conditions of use information about a resource:** see below under section 6 Licensing, Copyright, and Conditions of Use Information for

.

- **Making resources available to others in the library:** see below under section 7 Publishing: Making a Resource Available to Others.

2. Adding a Resource to the Library

As noted above in section 1 Contributing Resources to the Library: Introduction, Contributor users have a *work area* which can always be accessed by clicking the tab near the top of the screen. To add resources to the library, click on *work area*, then on the *Upload* icon:
. A series of options will then be shown to you that guide you through the upload

process.

2.1. Selecting a Workflow Process to Upload To

The first option in the upload form will be *Upload into Group/Process*. You will be presented with a drop-down menu from which you should select the workflow process you wish to upload your resource or resources to. If you only have access to a single workflow process, it will already be selected for you. Otherwise, follow your local administrator's instructions for selecting a workflow process. You will then see options to *Upload into Collection(s)*.

2.2. Selecting a Collection to Upload To

The next option in the upload form will say *Upload into Collection(s)*, with a list of collections underneath. You can upload your resource or resources to any number of collections from this list. You can use your browser's usual method for selecting multiple collections from the list, e.g. hold down the CTRL key while selecting collections. If you only have access to a single collection, it will already be selected for you. Otherwise, follow your local administrator's instructions for selecting a collection or collections, then go to section 2.3 Uploading Resources for details on what to do next.

2.3. Uploading Resources

The next option in the upload form will be *Upload Resource*. You must then select what kind of resource you wish to add to the library, from the following three options:

- **files/packages:** single files, and more complex packages including IMS and SCORM content packages.
- **web resources:** links to external web resources.
- **physical resources:** references to external or non-Web-based resources such as books, articles, DVDs.

The rest of this section gives specific instructions for adding different resource types to the library.

2.3.1. Uploading Single Files

Single files, for example Word documents, PowerPoint presentations, PDFs, images, etc. can be added to intraLibrary. To upload a single file use the following steps:

1. Select the *work area* tab near the top of the screen.
2. Select the *Upload* icon:
3. Select which workflow process you wish the resource to be uploaded to. See your local administrator's instructions for more information on this. If you only have access to one workflow process, it will already be selected for you.
4. Select which collection or collections you are adding the resource to. If you only have access to one collection, it will already be selected for you.
5. Select *file/package* under *Upload Resource*.
6. Optionally, enter a title for the resource. If you don't enter a title, the file name will be used as a title. You can change this later, when cataloguing the resource. See below under section 3 Cataloguing a Resource for more details.
7. Click on the *Browse* button next to *select file* and find the resource you want to add on your own local computer or file system.
8. You can add any number of resources in a single upload action by clicking the ❖ icon to enter further resources. Repeat steps 6-7 for each resource.
9. By default, the *return to workarea* checkbox is ticked; leave this if you wish the to go straight back to your *reserved* area as soon as the resource or resources are uploaded. De-select the checkbox if you wish to stay in the upload form to add more resources.
10. By default, the *reserve* checkbox is ticked; leave this if you wish the resource or resources to go straight into your *reserved* area for you to work on. De-select the checkbox if you wish to add the resource or resources to the *available* area so anyone who has access to the relevant workflow stage can work on it.
11. Click on the *upload resource* button to upload the file.

There may be a delay while your file is uploaded. This can be very short, but uploading a very large file, or a large number of files over a slow network connection may take much longer. When your file has finished uploading you will see the message: **resources were successfully imported**.

The next step is to add information describing or cataloguing the resource. This information about a resource is known as *metadata*; see below under section 3 Cataloguing a Resource for more details.

2.3.2. Uploading Complex Objects: Content Packages

A resource that contains more than one file must be uploaded as a standard content package that is compliant with the IMS Content Packaging specification or with SCORM. A content package is a .zip file that contains all the files used within the resource, and a manifest file that functions like a table of contents for the whole resource, determining its structure, or the order in which learners will see the resources within the package. There are many tools available that you can use to create and edit standard content packages.

Uploading a packaged resource is exactly the same as uploading a file; follow the process noted above in section 2.3.1 Uploading Single Files. You will be selecting a file that has a .zip file extension from your file system. IntraLibrary will automatically check whether this is a normal .zip file or a content package. Content packages are validated as standard IMS or SCORM packages by intraLibrary before they are imported into the system. If your content package is invalid it will need to be fixed before it can be uploaded.

The next step is to add information describing or cataloguing the resource. This information about a resource is known as *metadata*; see below under section 3 Cataloguing a Resource for more details.

2.3.3. Adding Links to External Web Resources

IntraLibrary allows links to resources held elsewhere on the Web to be added to the library, and catalogued and classified like any other resource. This means that users can find relevant resources through a single intraLibrary search whether or not they are stored in the library. To add a Web link to the library use the following steps:

1. Select the *work area* tab near the top of the screen.
2. Select the *Upload* icon:

3. Select which workflow process you wish the resource to be uploaded to. See your local administrator's instructions for more information on this. If you only have access to one workflow process, it will already be selected for you.
4. Select which collection or collections you are adding the resource to. If you only have access to one collection, it will already be selected for you.
5. Select *web resource* under *Upload Resource*.
6. Optionally, enter a title for the resource. If you don't enter a title at this stage, you can do so later, when cataloguing the resource. See below under section 3 Cataloguing a Resource for more details.
7. Enter the resource's URL in the *web address* box.
8. You can add any number of resources in a single upload action by clicking the ➕ icon to enter further resources. Repeat steps 6-7 for each resource.
9. By default, the *return to workarea* checkbox is ticked; leave this if you wish the to go straight back to your *reserved* area as soon as the resource or resources are uploaded. De-select the checkbox if you wish to stay in the upload form to add more resources.
10. By default, the *reserve* checkbox is ticked; leave this if you wish the resource or resources to go straight into your *reserved* area for you to work on. De-select the checkbox if you wish to add the resource or resources to the *available* area so anyone who has access to the relevant workflow stage can work on it.
11. Click on the *upload resource* button to add the URL to the library. The resource itself remains at its remote location on the Web but you now have an intraLibrary entry for it.

The next step is to add information describing or cataloguing the resource. This information about a resource is known as *metadata*; see below under section 3 Cataloguing a Resource for more details.

2.3.4. Adding References to Physical Resources

IntraLibrary allows references to physical, or non-Web-based digital resources, such as books, journal articles, videos, etc., to be added to the library, and catalogued and classified like any other resource. This means that users can find relevant resources through a single intraLibrary search whether or not they are stored in the library, or indeed available in digital format at all. To add a reference to a physical resource to the library use the following steps:

1. Select the *work area* tab near the top of the screen.
2.

Select the *Upload* icon:

3. Select which workflow process you wish the resource to be uploaded to. See your local administrator's instructions for more information on this. If you only have access to one workflow process, it will already be selected for you.
4. Select which collection or collections you are adding the resource to. If you only have access to one collection, it will already be selected for you.
5. Select *physical resource* under *Upload Resource*.
6. You must enter a title for the resource. You can change this later if necessary, when cataloguing the resource. See below under section 3 Cataloguing a Resource for more details.
7. Enter a location for the resource in the *physical location* box, following your local administrator's guidelines. This location could be a shelf call number for a book in a library, a URL linking to a catalogue entry in a library catalogue, a journal reference for an article or paper, etc.
8. You can add any number of resources in a single upload action by clicking the icon to enter further resources. Repeat steps 6-7 for each resource.
9. By default, the *return to workarea* checkbox is ticked; leave this if you wish the to go straight back to your *reserved* area as soon as the resource or resources are uploaded. De-select the checkbox if you wish to stay in the upload form to add more resources.
10. By default, the *reserve* checkbox is ticked; leave this if you wish the resource or resources to go straight into your *reserved* area for you to work on. De-select the checkbox if you wish to add the resource or resources to the *available* area so anyone who has access to the relevant workflow stage can work on it.
11. Click on the *upload resource* button to add the resource reference to the library. The resource itself remains at its physical location but you now have an intraLibrary entry for it.

The next step is to add information describing or cataloguing the resource. This information about a resource is known as *metadata*; see below under section 3 Cataloguing a Resource for more details.

3. Actions in a Workflow

3.1. Your Work Area

Reserved and Available Tabs: In order to get started with adding or editing metadata for resources, or any other actions in your workflow, click on your *work area* button near

the top of the screen; you will immediately be taken to the *reserved* tab. This is where resources that you have permission to work on, and that you have set aside for yourself, are listed. There may also be resources available for you to work on in the *available* tab. You can reserve resources in the *available* area by clicking on the *reserve resource* icon: . Noone else can edit resources that you have reserved. You can send resources back

into the *available* tab from your *reserved* tab by clicking on the *unreserve resource* button: . This makes them available to everyone in your group with access to the workflow

stage the resource is in.

Searching your Work Area: You can have any number of resources in your *work area*. If you have a large number, you may find it useful to be able to search them. You can search your *reserved* and *available* areas using the search box on the left-hand side of the screen called *Filter Resources*. You can search by group workflow stage, or by using a saved search you have previously set up in the *Advanced Search* screen. For more information on this, see section **Saving Your Favourite Searches** in the intraLibrary manual ***Getting Started- Finding and Using Resources***. You can also choose to see resources that others in your group or groups have reserved by selecting the *Show resources reserved by others* checkbox.

3.2. Working on a Resource

This section describes how to carry out actions in your workflow. To see what actions are available to you click on the title of the resource in your reserved work area. You will find that in this area the resource page has more information than a resource page outside the work area - it now includes a section headed *your workflow actions*. The actions available to you depend on how your administrator has set up your workflow so the number and type of actions may differ from those shown below.

Reserved (9)	Available (1)	My Resources (151)	Resource Page

Full resource detail: Forest Flowers.jpg

Your workflow actions

Upload or Import

Edit metadata	Overwrite resource	Link related resources	Submit to next stage	Unreserve resource

Things you can do with this resource

Preview	View metadata	Download	Delete	Workflow	Find related resources	Manage favourites	Add to basket

You may carry out the actions in this section in any order. There will usually be an action *submit to next stage* which is not available until other essential actions have been completed. If you click on this unavailable "greyed out" action you will be informed what actions must be completed before this button will become available.

In the following section we will describe how to carry out a number of common actions:

Edit metadata: Cataloguing Resources in the Library

Overwrite resource: Updating a Resource with a New Version

Edit rights: Licensing, Copyright, and Conditions of Use Information for Resources

Link related resources

Submit to next stage: Publishing - Making a Resource Available to Others

3.3. Creating and Editing Metadata: Cataloguing Resources in the Library

Now you can create a basic description for a resource, a process known as cataloguing, or creating metadata. The purpose of the information you add here is to allow people to find the resource in the library, and to provide them with details about the resource that might help them to select or use it. It is also important that this information is correct as it helps to identify who is responsible for creating the resource, thus ensuring that authors and other contributors are acknowledged. It can assist with use of the resource by providing technical information, such as what format the resource is in, and educational information, such as how you use it yourself with students.

The managers of your intraLibrary installation will have made decisions about what metadata should be created for resources, and how. Your administrator will have set the system up accordingly. This means that there are a number of possible permutations for metadata and workflows, so this guide aims only to give you a basic overview for general use of the *Metadata Editor*. Please consult your local administrator's guidelines for more information.

Click on the *edit metadata* icon for the resource you want to describe. This takes you to the *Metadata Editor*.

The left side of the metadata editor contains *power tools* which make it easier and faster to create and manage metadata. The right side of the editor contains a number of metadata fields for you to complete - possibly more than shown here. Across the top are options that modify the metadata editor view and allow you to save and leave the editor.

Filling in Metadata Fields

IntraLibrary allows administrators to set up the system to fill in some of the metadata fields automatically, so you may see some fields filled in already. You can select which metadata fields you wish to see in the Metadata Editor by using the drop-down menu in the toolbar. Usually one of the options to select is *mandatory* (as in the example in the illustration above); if you select this option you will only see those fields that you *must* fill in for the resource to be moved to the next stage in its workflow. You can, however, select any viewing option for the metadata, and fill in those fields that are available to you. In any view of the metadata in the Editor, mandatory fields are indicated by *REQUIRED* in red.

Saving Metadata

There are three options for saving metadata in the Metadata Editor toolbar: *save*; *save and exit*; and *exit editor*.

- Select *save* at frequent intervals when creating and editing metadata to ensure your work isn't lost. You can click the *revert metadata* button in the left-hand screen at any time to undo any unsaved metadata; however, once you have saved there is no *undo* button.
- Selecting *save and exit* allows you to go back to your *reserved* list having saved your work so far.
- Selecting *exit editor* allows you to return to your *reserved* list without saving any work.
- You can also select *revert to saved metadata* in the left-hand Metadata Editor Tools screen to get back the metadata you most recently saved.

Power tools: Saving Time by Reusing Metadata

IntraLibrary offers you several ways of reusing metadata from other resources when cataloguing a new resource. Some resources may be very similar, for instance, a set of images of the same thing by the same photographer, or a set of slide shows for the same course by the same lecturer. These tools allow you to save time when cataloguing such similar resources. The tools, which are available in the left-hand screen of the Metadata

Editor (see illustration above), are as follows:

- Apply template
- Copy metadata from external file
- Copy metadata previously saved from another resource in intraLibrary.

Apply template: A template is a document in XML format that allows the system to automatically fill in any number of metadata fields or classifications for a resource. Your administrator may have made one or more templates available in the system. For instance, there may be a default template that is applied to general resources, and another template that is applied to a special collection, or a specific resource type, such as all videos or photographs. If this is the case, these templates will appear in a drop-down menu above *apply template* in the Metadata Editor Tools screen. NB: If there is more than one template in the system, you can select one of these to be your own default metadata template; this will always automatically populate resources you upload with metadata. To set your own default template, click on *profile*, then *preferences* in the main toolbar at the top of the screen. Otherwise, to apply a template:

1. Go to the drop-down menu above *apply template* in the Metadata Editor.
2. Select the template you wish to apply from the drop-down menu.
3. Click on *apply template.*

The metadata fields for your resource will be automatically filled in by this template. You can still edit this metadata for the new resource, and add additional metadata, once you have done this.

Copy metadata from external file: IntraLibrary allows you to save the metadata record for any resource in the library to your local file system in XML format. Then, when you are in the Metadata Editor, you can use this saved metadata when cataloguing a new resource. NB: You can also use other IEEE or IMS metadata XML files that you have created or saved from other XML, metadata or content packaging tools. To download and reuse metadata:

1. Click on the *download* icon either on the results list or the download icon on the resource page for the resource whose metadata you wish to save.

2. In the popup window, select *advanced* and select the relevant metadata download option (either in IMS or LOM format; it doesn't matter which if you're going to re-import the metadata into intraLibrary, but consult your local administrator if you're not sure).
3. Save the XML file to your file system.

4. Alternatively, save a metadata file from another source to your file system.
5. When creating metadata for the new resource you are working on in the Metadata Editor, select *from external file* under the *copy metadata from* option in the left-hand screen.
6. Browse your local file system to select the XML metadata file you have previously saved.
7. Click on *copy metadata*.

The metadata from the XML file you selected will fill in the relevant metadata fields of the resource you are working on. You can still edit this metadata for the new resource, and add additional metadata, once you have done this.

Copy metadata previously saved from another resource in intraLibrary: IntraLibrary allows you to copy the metadata record for any resource in the library. Then, when you are in the Metadata Editor, you can use this copied metadata when cataloguing a new resource. NB: Metadata only stays in the copy buffer while you are still logged in. If you log out you will need to copy the metadata again. To copy and reuse metadata:

1. Click on the *view metadata* icon on the resource page whose metadata you wish

   to copy, and select *view metadata*. This will open a metadata view popup.
2. Click on the *Copy this metadata* icon at the top left of the metadata view popup. A

   message will appear at the top of the screen: ***This metadata record has been added to your copy buffer***.
3. When creating metadata for the new resource you are working on in the Metadata Editor, select the relevant metadata record by title from the drop-down list under the *copy metadata from* option.
4. Click on *copy metadata*.

The metadata you previously copied will fill in the relevant metadata fields of the resource you are working on. You can copy any number of metadata records in this way; they will stay available to you in your *Work Area* until you have logged out of the library. You can still edit this metadata for the new resource, and add additional metadata, once you have done this.

Preserving live fields: For each of the above options for reusing metadata, certain important metadata fields from the existing metadata for the new resource (known as *live fields*) will be preserved. If you wish to overwrite these metadata fields, you can unselect the *preserve live fields?* option. The *live fields* are:

- general.title = "Title"
- general.catalogentry = "LOM Identifier"
- metametadata.catalogentry = "LOM Metadata Identifier"
- technical.format = "Technical Format"
- technical.size = "Size of Resource in Bytes"
- technical.location = "Location of Resource"

Avoiding duplication of fields: If the metadata for a resource already has some fields filled in, the template or copied metadata will *not* overwrite these fields, it will simply add another field. This means that in some cases the field will be populated twice with the same data. This will usually be because the system added metadata from your default template when you first uploaded it. Sometimes it may be because you have uploaded a content package already containing some metadata, or because someone who worked on the resource before you in a workflow added the metadata. There are a number of ways around this, e.g. ensure that you don't apply a default template to all of your resources at upload when you intend re-using metadata (go to *profile* then *preferences* and select **none** for *Metadata template*; however, your administrator may not have allowed you to have access to this option). Another way is to make sure that the metadata you copy or import doesn't populate fields that you know will already be filled in.

Classifying a Resource

Classifying a resource allows users to find it by browsing through the library's browse tree, as an alternative to searching. You can add any number of classifications to a resource. The classifications go into the resource's catalogue record, or metadata; you can see what classifications a resource has been given by clicking the view metadata icon: on the

resource page.

If you have copied metadata from another resource as described above, or if your administrator has set up your system to apply a template with classifications in it when you upload a resource, then there may already be classifications for the resource.

To classify a resource, go to the *classification* section of the Metadata Editor. It is usually
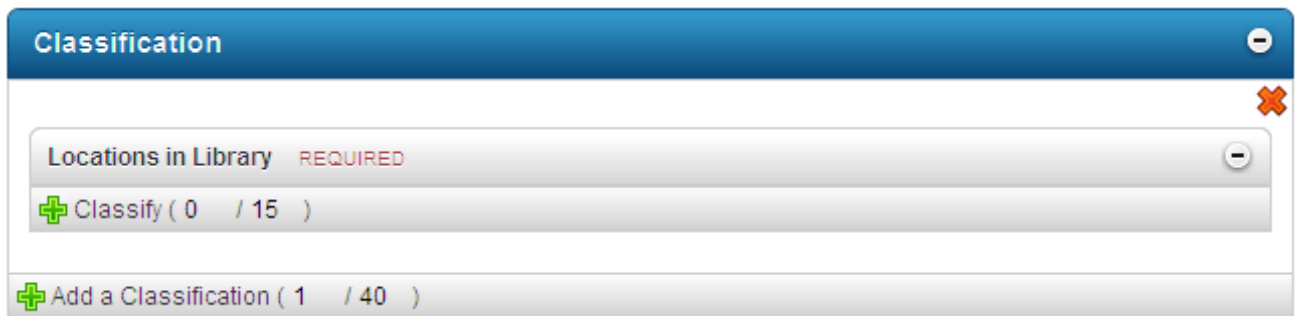
Click on the green plus sign beside *Classify* to open the classifications available to you. What you see will depend on the clasifications installed in your intraLibrary.

There are two ways to classify a resource:

Browse: To explore the classifications in the browse tree, use the "+" and "-" buttons to move through the hierarchy as when browsing for resources. When you have found a suitable category, click on it (that is, click on the heading, not the "+" button). Your selected classification will be added to the classification section.

Search: To search the classification tree for suitable categories, click the *Search* tab next to the *Browse* tab. Type a keyword or phrase, and click *Search*. You will be presented with a list of options from the classifications available. You can then select as many of these classifications by clicking as you wish by clicking on each. The classification details will at the top of the classification section.

If you wish to remove a classification once it has been selected click on the red cross to the right of the classification to be removed.

Note: If you have uploaded a resource as an IMS or SCORM content package, with classifications already in its metadata, then the resource will automatically be classified correctly in the library, **if** the classification information in the resource's metadata exactly matches a classification node in the library. It is particulary important that the classification has the same "source" as the associated classification system in the library. See the intraLibrary *Librarian's Guide* for more technical details on how classification systems work in intraLibrary.

Adding Extra Classification Information

IntraLibrary allows you to add extra information about each classification you give to a resource. Your local administrator will have determined whether you can do this; consult their guidelines for more information. In some cases the extra information will be mandatory, in which case you will see the relevant fields to be filled in when the *mandatory* view option is selected in the Metadata Editor. In some cases the extra information will be optional, so you will need to select the appropriate viewing option from the drop-down menu in the Metadata Editor toolbar to see and add these extra fields. The extra fields are:

- Classified by (this lets you select the type of classification, e.g. "educational purpose" or "discipline".
- Description in context (this lets you add text about why you have classified the resource here).
- Keywords in context (this lets you add additional keywords relating to the particular classification you have chosen).

Next Steps

- Depending on what tasks you are required to do within a workflow, you may be able to update the resource with a new version. See below under Updating a Resource with a New Version
- You may also be able to link this resource to others, see below under Linking Related Resources
- You may also be responsible for adding copyright and conditions of use information to the resource. If this is the case you will see *edit rights* as an option in the *your workflow actions* are on the resource page: . For more information see below under

    Licensing, Copyright, and Conditions of Use Information for Resources.
- Once you have completed all of your workflow tasks, you can move the resource to the next stage in its workflow. For more information see below under Publishing: Making a Resource Available to Others in the Library.
- Or you may not be required to cary out any o fthese actions. The actions you can carry out will all be displayed in the *Your workflow actions* section of the Resource Page.

4. Updating a Resource with a New Version

If your administrator has enabled the *overwrite* action in your workflow, you can overwrite a

resource with a new version, copying over the metadata from the old resource. If this is the case you will see *overwrite resource* as an icon: in *your workflow actions* area.

Any PublicURL linking to the old resource will now link to the new resource. You can archive the old version of the resource, or discard it. Old versions are known as *archived versions* and the most recent version is known as the *live version*. Archived versions are available for preview and download to users who have those permissions on the live version. You can update the metadata for the new version of the resource; the archived version will maintain its old metadata. You can also undo this overwrite as long as the resource remains in the same workflow process. The *undo overwrite* action becomes available after you have performed an *overwrite*.

5. Linking Related Resources

If your administrator has enabled the *link related resources* action in your workflow, you can link a resource to any number of other resources in the library, using the standard relationships allowed in LOM metadata. If this is the case you will see *link related resources* as an option in the *Your workflow actions* section of the resource page: .

This link will populate the LOM Relation metadata fields in both the linked-from and linked-to resources. This enables related resources to be found and viewed easily by users, using the *find similar resources* button , in any resource page.

Select the *link related resources* option to go to the Link Related Resources Editor. In the Editor there are three ways to find resources to link to: you can carry out a simple search of published resources; you can select from My Basket; or you can select from resources that are in your reserved area. Select one of these options, and select what type of relationship you want to create. Then select which resources you wish to link to the original resource and click on *Create link*. All resources involved (linked-from and linked-to) will have their LOM Relation metadata updated, and the linked-to resources will appear in the *Linked Resources* list near the bottom of the Editor. NB: You will need to click the *refresh list* button to see the full list appear after linking. If you are linking a large number of resources you may need to click this several times before all linked resources appear.

Linked resources can be unlinked again, by selecting *delete link* next to the resource
you wish to unlink. This action deletes the LOM Relationship metadata in both resources.
You can start again with another relationship and/or another search at any time.

Resources that have application profiles associated with them that do not include the LOM
Relation fields or the standard LOM Relation Kind vocabulary assigned cannot be linked;
nor can resources with no title or LOM identifier fields filled in, as these fields are necessary
for creating links.

6. Licensing, Copyright, and Conditions of Use Information for Resources

IntraLibrary allows rights information to be added to a resource's metadata, including
copyright, licensing, and terms and conditions of use information. Because rights
information is so important, it is vital to check with your local guidelines as to how to
complete this part of the workflow.

Adding Basic Rights Information in the Metadata Editor

IntraLibrary allows basic rights information to be added through the Metadata Editor in the
Rights and Conditions fields. See your local administrator's guidelines for more information,
also see above under the section Creating and Editing Metadata: Cataloguing Resources in
the Library for how to add metadata.

Adding Licences and Rights Information in the Licence Editor

Your local administrator may also have set up your library to add more detailed rights
information. If this is the case you will see *edit rights* as an option in the *Your workflow
actions* section of the resource page: . Selecting this option will take you to the Licence

Editor screen. Here you will see a list of licensing options on the left-hand screen under
Select Licence, and some metadata fields on the right-hand screen. In some cases, you
have to select a licensing option on the left in order to see the appropriate rights metadata
fields on the right. Some of these fields may already be filled in by a metadata template
created by your local administrator.

Saving Rights Information in the Licence Editor

Once you have selected the appropriate licence for the resource, and checked and completed any additional rights metadata fields, you can save the rights information. There are three options for saving rights information in the Licence Editor toolbar: *save*; *save and exit*; and *exit editor*.

- Select *save* at frequent intervals when creating and editing rights information to ensure your work isn't lost.
- Selecting *save and exit* allows you to go back to your *reserved* list having saved your work so far.
- Selecting *exit editor* allows you to return to your *reserved* list without saving any work.

7. Publishing: Making a Resource Available to Others in the Library

The purpose of intraLibrary is to enable sharing of resources among a group of people. Therefore, the end result of uploading a new resource is to eventually make it available to others. Making a resource available to others in the library is known as *publishing* the resource.

Your local administrator can define multi-stage workflows for submitting resources to the library. A resource is *published* when the necessary stages in the workflow are completed. In the basic workflow outlined above, the resource may be published after upload, cataloguing, classification and adding rights information. In any case, when you have completed your part of a simple or complex workflow, you must click the *submit to next stage* button . If a process has not been completed, this button will appear greyed out.

If you click on the greyed-out button, a box will open up telling you what needs to be completed for the resource to be moved to the next stage.

When you have successfully completed your stage in the workflow for a resource, you will see a message at the top of the screen telling you which workflow process has been successfully completed, e.g.: "You have successfully completed process: 'Upload and Catalogue'. If the resource is published at this stage you will also see a message saying: "The resource has been successfully published to the repository".

It is possible for a resource to be in a workflow (and thus visible in your *Work Area*) and to

be published at the same time. Unpublished resources have an unpublished stamp:
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8. My Resources

The *My Resources* button   in the navigation bar lists all the resources you have ever

contributed to the library, regardless of their workflow stage or published status. The only exceptions are resources which have been published to a collection that you don't have permission to access, or resources that have subsequently been deleted from the system.