

Getting Started with ScholarSphere

This guide will take you through the process of uploading and labeling a file in Penn State's repository service, ScholarSphere.

Logging Into ScholarSphere

1. Identify an item you would like to deposit and make sure you have permission to deposit it. (See <https://scholarsphere.psu.edu/about/>.)
2. Open a browser window and navigate to <https://scholarsphere.psu.edu>.

Note: Chrome is the recommended browser for ScholarSphere.

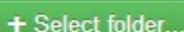
3. Click the  Login button at the top right-hand corner of the screen.
When prompted, log in using your Penn State accessID and password. Once you have logged in you will be directed to your Dashboard.

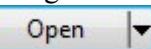
Uploading Your File

4. Click the  Upload button.
5. If the files you want to import are located on your **computer**, click the  My Computer tab. Be sure to read the deposit agreement. If you agree with ScholarSphere's terms, mark the checkbox to indicate that you have read and agree with ScholarSphere's terms of use.

Note: If you do not mark the checkbox you will not be able to deposit information in ScholarSphere.

6. Click the  + Select files... button. A file upload window will appear.

Note: If you are using Chrome you can upload an entire folder at once by clicking the  + Select folder... button.

7. Navigate to the location of your file in the file upload window. Select the file and then click the  Open button.

Note: To select more than one file or folder at once, hold down the ctrl key in Windows or the command key in Mac OS before clicking the additional file names.

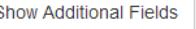
8. Click the  Start upload button. Once the file has finished uploading you will be redirected to the Apply Metadata page. This is where you will enter the metadata for the file you have uploaded. For more information about metadata, see <https://scholarsphere.psu.edu/help/#meta>.
9. If the files you want to upload are located in **Dropbox or Box**, click the  Cloud Providers tab. Be sure to read the deposit agreement. If you agree with ScholarSphere's terms, mark the checkbox to indicate that you have read and agree with ScholarSphere's terms of use.
- Note:** If you do not mark the checkbox you will not be able to deposit information in ScholarSphere.
10. Click the  Browse cloud files button. A pop-up window will appear with a drop down menu where you can choose between Box and Dropbox cloud providers. Select your cloud option and click the  Connect to Box button (if you choose Dropbox, the button will read Connect to Dropbox). This will take you to the login screen for your cloud account. Once you are logged in, click the  Grant access to Box button to grant permission to ScholarSphere to access your cloud files. Select the files or folders you want to import and click the  Submit button.

Click the  Submit 3 selected files button (number of selected files will be customized to the number you have chosen to upload). Once the file has finished uploading you will be redirected to the Apply Metadata page. This is where you will enter the metadata for the file you have uploaded. For more information about metadata, see <https://scholarsphere.psu.edu/help/#meta>.

Labeling Your Data

1. Describe your file.
 - a. **Individual Titles**—You may rename the file in the “Title” field. The default title is the name of your file.
 - b. **Bulk Descriptions**—Enter metadata for your file. Required fields include Keyword, Creator, and Rights. For descriptions of each of these fields, click the  icon. To add more than one entry for any of the metadata fields, click the  + button. Entering information in the Resource Type field is optional, but recommended. To identify your file as more than one Resource Type, hold down the ctrl key in Windows or the command key in Mac OS.

Note: If you have uploaded more than one file, the Bulk Descriptions settings will be applied to all of the files. You will be able to edit these descriptions in the records of individual files later.

Note: You may provide additional metadata for your files by clicking on the  Show Additional Fields button at the bottom of the Bulk Descriptions section.

- c. **Bulk Permissions**—Choose your privacy settings. For a description of these options, click the  button.

Note: If you have uploaded more than one file, the Bulk Permissions settings will be applied to all of the files. You will be able to edit these permissions in the records of individual files later.

2. Click the  button at the bottom of the screen. Once you have saved your file you will be redirected to your dashboard.

Note: You will not be able to save the file until you enter information into all of the required fields.

3. Wait for ScholarSphere to process your files. While the files are being processed, you will see a green message at the top of the screen, and any files you just uploaded will be marked with a  icon and a  visibility rating. If these indicators do not disappear promptly, refresh your browser window.
4. Click the name of the file you deposited to view its information. You will be redirected to the file's record, where you will see that there are many additional fields you may update.

Actions

5. Click Edit under the Actions heading.  
6. Add additional information readers could use to find or identify the file, including an abstract or summary, the names of additional contributors, or a URL where the file can be located. Take note of the Versions and Permissions tabs; you can visit these tabs in the future to update your file or its access permissions.

Note: In most cases, editing the advanced description of your file is optional but recommended in order to make your work more accessible. If you are uploading previously published content, you may be legally responsible for entering information such as the name of the publisher, location, and document identification number. For more information, consult your publisher (<http://www.sherpa.ac.uk/romeo/>) and read the discussion of copyright permissions in the ScholarSphere Deposit Agreement (<https://scholarsphere.psu.edu/agreement/>).

7. After entering your information, click the  button at the bottom of the page.

Congratulations! You have deposited your work in ScholarSphere!