

EPrint Archive User Documentation

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1 Introduction

This document explains how to use the EPrints software archive as a public user. Certain details may vary from site to site; in these cases the archive Web pages should provide you with any additional information you need.

2 Accessing Documents in the Archive

There are two principle methods for accessing documents in the archive, *browsing*, and *searching*. These are described below.

There are other ways in which a document may be reached:

- Via a URL supplied by a third party
- Via an open archives service (e.g. a distributed search or citation link.)
- Via a search engine, such as *Google* or *Alta Vista*.

When you reach a document in the archive, normally you'll be presented with a page called the *abstract page*. This page will display some information about the document, usually including an abstract an full reference, and will show you in what full text format(s) the document is available for download.

2.1 Browsing

Browsing is a good way of accessing documents if you don't have a specific idea of what you're looking for. You can browse through a catalogue of subject areas, and when you reach a subject you're interested in, you can select documents that interest you from the list you're presented with.

To access the subject browse display, either select *Browse by Subject* from the front page of the archive, or by selecting *Browse* on the left-hand navigation bar elsewhere on the site.

You'll start with an overview of the subjects covered by the system. Next to most subjects is a number in brackets; this is the number of documents held in the archive pertaining to that subject. Select a subject that interests you, and the display will updated. If you selected a subject with documents in the archive, those documents will be listed on the display. Also some of the subject catalogue will be displayed at the top of the page, and you can click on these

Title/Abstract/Keywords	patient care	Match all, in any order ▼
		Match all, in any order
		Match any
		Match as a phrase

Figure 1: Text Search Field

to move to other subject areas. To access a paper, simply click on its reference in the display.

On the abstract page, you should be able to see what subjects are pertinent to the current document. Clicking on one of those subjects will take you back to the relevant *browse by subject* view.

2.2 Searching

The archive offers two levels of searching, *simple* and *advanced*. They are both similar, but the advanced form lets you perform a finer-grained search using more fields. Access the simple search using the *Search the Archive* link on the front page, or using the *Search* option on the left-hand navigation bar elsewhere in the archive. To perform an advanced search, use the *advanced search* link at the top of the simple search page.

Generally, there are three types of search field.

2.2.1 Text Search Fields

These are used to search fields like *abstract* or *author*. These are the fields where there is a text entry area, and a popup menu just to the right of it, as shown in figure 1.

Type your search terms into the box. You can decide how the system will use your search terms by selecting one of the options from the popup menu just to the right of the box:

Match all, in any order. In the example shown, the system will search for records in which any of the *title*, *abstract* or *keywords* fields contain both the word “patient” and “care”.

Match any. In the example shown, the system will search for any record with either the term “patient” or “care,” in any of the *title*, *abstract* or *keywords* fields.

Match as a phrase. In this case, the system will search for your terms appearing exactly as you type them. In the example, the system will return any record with the phrase “patient care” appearing in the *title*, *abstract* or *keywords*.

2.2.2 Lists of Values

With these you can select one or more values from a list of values for the system to search for. In the example shown in figure 2, the system will retrieve “In Press” and “Published” articles, but not “Unpublished” articles. If no value in



Figure 2: List Search Field



Figure 3: List Search Field Popup Menu

the list is selected, the system will not filter out records in the search using this field (i.e. it will retrieve records with any value for that field.)

In cases where each individual record may have more than one value attached to the list, you can also change search behaviour by selecting “Any of these” or “All of these” from the popup menu on the right of the list, as shown in figure 3.

Any of these. If this is selected, any record which has any of the values you select will be retrieved.

All of these. If you select this option, a record must have all the values you choose associated with it to be retrieved.

Again, if no value or “Any” is selected, the field is not used to retrieve records.

2.2.3 Years

When you’re searching a year field, you can specify a single year or range of years that you’re interested in:

1999 retrieves only records where the year is ‘1999’;

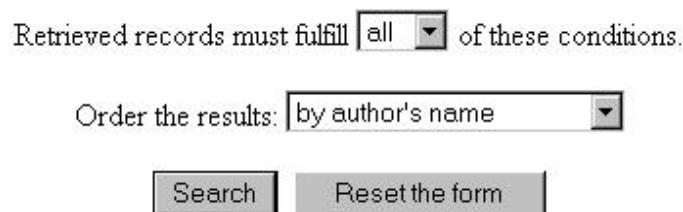
1987–1990 retrieves records with years between 1987 and 1990 inclusive;

1995– retrieves records with years of 1995 or later;

–1998 retrieves records with years up to and including 1998.

2.2.4 Yes/No Fields

Some fields can have the value *yes* or *no*, for example the “Refereed” field. In this case, the search field lets you specify whether you want retrieved records to have the value *yes* or *no* for this field, or whether you have no preference, in which case the field isn’t used to find records.

The image shows a search options interface. At the top, it says "Retrieved records must fulfill" followed by a dropdown menu showing "all" and a downward arrow, and then "of these conditions." Below this, it says "Order the results:" followed by a dropdown menu showing "by author's name" and a downward arrow. At the bottom, there are two buttons: "Search" and "Reset the form".

Retrieved records must fulfill of these conditions.

Order the results:

Figure 4: Search Options

2.2.5 Search Options

At the bottom of each search screen, you can set a couple of search options, using two popup menus. This is shown in figure 4.

The topmost of the two lets you choose how strict your search should be:

Records must fulfill all conditions: Retrieved records will match everything you've put in search fields.

Records must fulfill any conditions: Records can match any one search field to be retrieved.

Note that in either case, any search field where you haven't typed or selected anything, or selected "any," will be ignored and will not be used during the search.

You can use the "Order by results" option to indicate to the system how to sort the retrieved records. Click on the "Search" button to initiate the search; the "Reset the form" button gives you a clean search form to start a new search.

3 Registering

Certain accounts need you to register with the system so that it can identify you. Principly, the subscription (alerting) service and document depositing services require registration. When you register with the system, you will be given a username and password that you will need to access those areas of the archive.

The registrations page (accessible using the navigation bar on the left of each screen, or from the site front page) contains instructions for registering, how to tell us you've changed your e-mail address, and how to be reminded of your username and password if you've forgotten them.

4 Subscriptions

The subscription feature lets you instruct the archive to alert you to new eprints arriving in the archive, by sending you an e-mail at regular intervals.

To create or edit a subscription, click on the "Subscription" option on the front page or navigation bar. If you don't have a subscription yet, you'll see a button saying "Create a subscription." It should come as no surprise that this button should be pressed to create a subscription.

Once you have a subscription you should see a form very much like the search form. Use the form exactly how you would a search form. Instead of the

The image shows a web form for subscription options. At the top, there is a label "Send updates:" followed by a dropdown menu with "Daily" selected. Below this, there are two buttons: "Subscribe" and "Remove the Subscription".

Send updates: Daily

Subscribe Remove the Subscription

Figure 5: Subscription Options

“Search” and “Reset the search” buttons, you’ll see the options shown in figure 5 at the bottom of the form.

The lower two options update your subscription options, and remove the subscription respectively. The popup menu above can be used to determine the frequency with which the system will send you your subscription e-mails. This can be daily, weekly or monthly. You can also set the frequency to “Never (Off)”, in case you want to turn off your subscription while you’re away without losing all of your subscription criteria.

5 The “Deposit Papers” Page

The first thing you’ll need to do, after registering, is fill out your user record. When click on “Deposit Papers,” you’ll see an option saying “View/change your user record”: Select this option. The user record form is described below.

Once you’ve correctly filled out your user record, the “Deposit Papers” page will show a number of options and some information. These are described below. Note that the options and information that appears may vary slightly, depending on whether you are in the process of depositing any papers and whether you have any papers pending entry into the main archive.

5.1 Your User Record

Your user record is used to hold contact information about you. Some of this information will be associated with eprints you upload; some of it is purely for internal archive use. General information like your name, URL, address and e-mail address are public, so it’s inadvisable to put down a home address. (Usually a postal address isn’t required.) Information about your operating system is purely to help the archive administrators help you.

Enter the relevant information in the boxes. Those boxes where the box name (on the left of the box) has an asterisk are required fields, that you must fill out before you can deposit papers in the archive.

Note that you cannot change your e-mail address here. This is deliberate; if you inadvertently enter an incorrect e-mail address the site will have no way of contacting you. Instructions for changing your e-mail address can be found on the “Registrations” page.

Rather than clicking in each box before you enter anything into it, you may find that your browser will let you use the tab key to move the cursor between the boxes. In this way you can enter the information much more quickly.

When you’ve entered the relevant information, click on the “Update Record” button at the bottom of the form. If the form is filled out correctly, you’ll be taken back to the “Deposit Papers” page. If there’s a problem with the form,

Documents in your Workspace

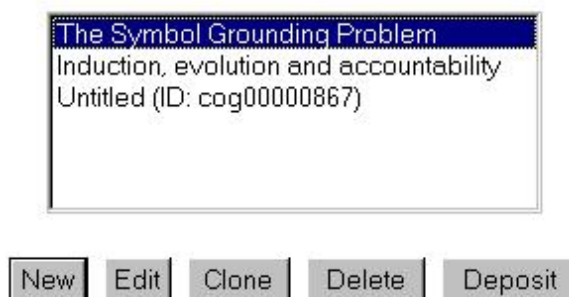


Figure 6: Workspace Display

the form will be presented to you again with a description of what's wrong. Correct the error and click on "Update Record" again.

5.2 Your Workspace

If you start uploading a paper, you can decide that you wish to wait until later before completing uploading and start on another paper. Papers that you are in the process of uploading are in your *workspace*.

If your workspace is empty, which will be the case when you first visit the page, you will see a button "Click here to start uploading a document." This button will add a fresh, empty record to your workspace and allow you to start editing it.

If there are papers in your workspace, you will see a list of those papers with some options, as shown in figure 6. The title of each paper you are uploading will be shown in the list, or its ID if you haven't yet given it a title.

Each of the buttons below the list is described below.

New This button creates a fresh record and starts the depositing process.

Edit If you select a paper in your workspace and click this button, you will be able to carry on depositing that paper.

Clone This button makes a clone of the paper you have selected from the list. This is useful if you are depositing a number of papers with similar information. You can fill out the common information, clone that paper, and then edit the clones so you aren't entering the same information twice.

Delete If you select a paper and click on this button, that paper will be removed from your workspace and discarded completely. You will be asked for confirmation first, so don't worry about accidentally clicking on it. Clones of any paper you delete are unaffected.

Deposit If you're happy that you've completed uploading the paper and associated information, then you can select the paper and click on this button to deposit the paper in the archive. Note that if there are problems with the paper (for instance, if a document file upload hasn't worked, or the

associated bibliographic information is invalid), you will be told what is wrong, and you won't be able to deposit the paper until those problems are fixed.

The depositing process is described in a following section.

5.3 Pending Papers

When you first deposit a paper, it is initially held in a 'buffer' before being installed in the archive. Any papers you have deposited in this buffer will be listed on the page.

If there is a problem with a paper you have deposited, it will be returned to your workspace, and you will be sent an e-mail telling you what the problem is.

5.4 Review Documents

Selecting the "review your documents in the archive" allows you to see what documents you have in the archive. If you have any documents in the main archive they'll be listed on the page. Next to the title of each will be one or two buttons. The purpose of each is explained below.

Clone This option makes a duplicate of the document (and all associated information), and places the copy in your workspace. The copy will be identical to the original, except that the title will have been changed to "Clone of (original title)". This option allows you to deposit revisions of your papers more easily without having to re-enter a lot of information that has stayed the same. Additionally, the "later version of" field will automatically be filled out; this means that when the paper is deposited in the archive, the different versions of the paper will all be linked. This means that readers will always be able to find the latest or published version of your paper.

Request Removal The policy of some archives may prohibit removal of papers from the archive, so this option may not appear in some archives. Even if it does appear, it should only be used in very exceptional circumstances, when removal of the paper is absolutely necessary; the version linking feature of the archive described above means that people will always see the latest version of your paper.

If you must select this option, you will be presented with a text box into which you should give a reason for requesting the removal of the document. Then click on "Send Request". Your request will be sent to the archive administrator, who may remove your paper or correspond with you further via e-mail.

5.5 Change Your Subscription Options

Clicking on this link takes you to your subscriptions page.

6 The Depositing Process

The depositing process is divided into a number of stages. You can move between these stages by using the "Back" and "Next" buttons at the bottom of

each screen. This should be familiar to those accustomed to using the “wizard” style of interface popular on many modern operating systems.

Don’t worry about losing information you’ve entered when you press a “Back” button: The system will store everything you’ve entered when you press it.

Each stage of the process is described in the following sections.

6.1 Deposit Type

In this screen, you should select the one option on the list that best described your paper. The option you choose here will affect what bibliographic information about your deposit the system will collect in later stages.

Then click on the “Next” button.

6.2 Succession/Commentary

The archive can link different versions of papers, and commentaries and responses together. These enable a reader to move easily around those versions, commentaries and responses.

If the paper you are depositing is a later version of a paper you previously deposited in the archive, enter its ID code into the “Later Version Of” box. If you used the “Clone” option on the “Review Documents” page, then this box will have already been filled out for you.

If you are depositing a commentary on a paper in the archive, enter its ID code in the “Commentary On” box. If you are responding to a commentary, enter the ID code of the commentary you are responding to in this box.

You can make sure that you’ve entered the correct ID codes by clicking on the “Verify IDs” button at the bottom of the page. The system will then show you what papers the ID codes pertain to, so you can make sure you’ve entered the right codes. Note that the system will not let you proceed with the deposit if either ID code you enter is invalid.

You can of course leave either box empty if your paper is not a later version of another, a commentary or a response. Click on the “Next” button when you’re sure the information you’ve entered is correct.

Note that you cannot deposit a later version of a paper that has been submitted by someone else.

6.3 Bibliographic Information

Next you will be asked to enter bibliographic information about your paper. The exact details that are required will vary depending on the deposit type you selected in the first stage.

Above each input field will be a short explanation of what should be put in the field. To the left of each input field is the field name. If the field name has an asterisk, the field must be filled out before the paper can be deposited; other fields are optional.

The following are the types of input field you may see:

Text boxes. Fairly straightforward. Just type the relevant information in, or copy and paste direct from your document.

Pages to

Figure 7: Page Range Input Field

	Surname	First names
Authors*	<input type="text" value="Tansley"/>	<input type="text" value="Robert"/>
	<input type="text" value="Harnad"/>	<input type="text" value="Stevan"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

Figure 8: Inputting a List of Names

Popup menus. Just select the most appropriate option from the popup menu.

Checkboxes. Used to indicate a *yes* or *no* value.

Lists. Select one or more appropriate options from the list.

Page ranges. Type the first page in the range into the box on the left, and the last page in the box on the right. The example in figure 7 shows the page range 140–158 inclusive. If the range consists of a single page, just enter the page number into the left-hand box, and leave the right-hand box empty.

Names. Enter the surname in the left-hand box and the first names (given names) in the right-hand box. Sometimes you can enter a list of names. In these cases, you can add more boxes for names by clicking on the “More Spaces” button on the right. The example shown in figure 8 shows a list of two names. Empty boxes are ignored.

To remove names from a list just remove the surname from the relevant box and leave it empty. Don’t worry about leaving a blank box in the middle of the list; the system will “bunch up” the list.

Once you’ve entered the relevant information, click on the “Next” button. If there are any omissions from the data, the system will explain what is wrong and re-present the form so you can fix the problems.

As with user records, most browsers will allow you to use the tab key to move between the input fields, allowing you to enter the information quickly.

6.4 Subject Categories

In the subject categories stage, you should select the subject or subjects from the list that best represent the content of your paper. Please try and be as accurate as possible here, and please don’t just select lots of categories if you’re unsure, just pick the categories you are sure of.

If you think there’s a serious omission from the subject category list, you can suggest a new category in the two boxes below the subject list. Note that you shouldn’t expect the archive to necessarily agree with your suggestion; don’t be

Format	Files Uploaded		
HTML	2	Upload/Edit	Remove
Adobe PDF	1	Upload/Edit	Remove
Postscript	0	Upload/Edit	
Plain ASCII Text	0	Upload/Edit	
Other	0	Upload/Edit	

Figure 9: Document Storage Formats Display

offended if they don't add your suggestion. This box is there purely for you to suggest categories you really believe are serious omissions.

Once you've selected your subject categories, click on the "Next" button.

6.5 Document Storage Formats

This page shows you an overview of the document files you have uploaded to the archive. The table shows the list of formats you can upload on the left, and the number of files you have uploaded in that format in the middle column. In the example shown in figure 9, 2 files have been uploaded for the HTML format (perhaps an HTML text file and a .gif figure image file), and one PDF file has been uploaded.

If you want to upload some files for a format, or remove some files you've already uploaded for a format, click on the relevant "Upload/Edit" button. When you do this, you'll be presented with the "Document file upload" screen described in the next section.

To remove all of the files for a format completely, click on the relevant "Remove" button.

Note that you must upload files for at least one of the formats shown in bold type. In figure 9, you must upload your paper in any one of HTML, a PDF file, a postscript (PS) file, or plain ASCII text.

The "Other" format allows you to upload the document in any other format you think may be useful. For example, you may wish to upload a Microsoft Word document.

When you're happy that you've uploaded all of the document files, click on the "Finished" button. Later, you'll have a chance to make sure that the uploads have all worked, and to come back and fix anything that's amiss.

Once you've clicked the "finished" button on this page, you'll be taken to the "Deposit Verification" page described in a later section.

No files have been uploaded for this format.

File upload method:

(Plain files only) Number of files to upload:

Figure 10: Selecting the Upload Method

6.6 Document File Upload

If there are no files uploaded in a particular format, you'll be presented a display similar to that shown in figure 10. From the pop-up menu you can select how you'd like to upload files to the archive:

Plain files. Choose this option if you want to upload files you have on your computer as-is. For example, if you have a PDF file on your hard disk, you would choose this option. If you have to upload more than one file using this method (for instance, an HTML file and a corresponding .gif figure image file,) then type the number of files you wish to upload into the "Number of files to upload" box.

From an existing Web site. If your paper is up on the Web already, this option will let you specify the URL of that paper. The archive software will copy your paper from that Web site. You should be careful with this option, though; and read the "uploading from an existing Web site" section below.

As a ZIP archive/Compressed TAR archive. Your paper may be stored in several separate files. This is often the case if your paper is stored in HTML format and contains figures. These two options let you use the ZIP tool (available on all operating systems) or the "tar" and "compress" tools (commonly used on UNIX systems) to collect all of those files into one compacted file.

Now click on the "Upload" button.

If you selected "plain files" or are uploading a compressed file, you'll see a display similar to figure 11. You can either type in the full filename and path of the document file or compressed file in the text field, or (recommended) click on the "Browse..." button, and select the relevant file using the file selector¹. If you're uploading more than one file, there will be a corresponding number of these fields to fill out.

If you selected "from an existing Web site," you'll see the display in figure 12. Enter the full URL *of the first page of the actual document*; don't just enter the URL of the Web site the document appears in or the URL of an index or contents page. *You must include the initial http://.* See the section "uploading from an existing Web site" below.

¹On some versions of Netscape, the file selector will only show HTML files. To fix this, remove the trailing .html from the "Filter" text field at the top of the selector.

Please enter the filename (with full path) of the document file in the box below.

The interface consists of a single-line text input box. To the right of the input box is a button labeled "Browse...". Below the input box are two buttons: "< Back" on the left and "Upload >" on the right.

Figure 11: Document/Compressed File Upload Field

Please enter the URL of the document you wish to upload to the archive in the box below.

Please be sure to include the initial **http://**.

Occasionally, uploading this way may not produce a totally accurate copy. This is because some assumptions about the structure of the HTML must be made, to stop the software trying to upload the whole World-Wide Web!

The interface consists of a single-line text input box. Below the input box are two buttons: "< Back" on the left and "Upload >" on the right.

Figure 12: Uploading Documents from an Existing Web Site

When you've entered the filenames or URLs, click on the "Upload" button. You'll then be taken back to the "Document File Upload" screen, and if everything's gone well, it should look something like the display in figure 13.

At least one file needs to be shown first. In many cases (e.g. PDF, Postscript) there will only be one file; if you've uploaded many files you will need to select one to be shown first. This should be the first file in the document that a reader should be presented with; the `.html` file if your document is in HTML format, or the contents page if your document is spread over several uploaded several HTML documents. Use the "Show First" button to tell the system which file should be shown first.

The "Delete" buttons on the right of the table can be used to remove individual files that you've uploaded in error. "Delete all files" will wipe the slate clean (for this document storage format only) so you can start again.

You can continue to upload more files as before. If you've uploaded all necessary files, click on the "Finished". This will take you back to the "Document Storage Format" page.

6.6.1 Uploading From an Existing Web Site

When you give the archive a URL to retrieve your document from, the archive stores a copy of the file stored at that URL. If the URL is an HTML file, the archive will also copy the images associated with that HTML file, and other HTML files linked to it.

You must supply the URL of the first page of document itself: NOT the URL of the whole Web site, or the URL of any contents page, index page or abstract page.

*You must include the initial **http://**; for example:*

These are the files you have uploaded for this format.

	Filename	Size (Bytes)	
	cloud.jpg	14457	Show first Delete
Shown First ->	symbol.html	40271	Delete

File upload method:

(Plain files only) Number of files to upload:

Figure 13: Uploaded Files

`http://www.myinstitution.edu/~myhomepage/paper.html`

And NOT

`www.myinstitution.edu/~myhomepage/paper.html`

In order to prevent the archive trying to copy the whole World Wide Web by following every single link, some rules are applied when the system collects your document:

- Only files reached by “relative” links are retrieved. For example, if the HTML contains a link to `node1.html` then `node1.html` will be copied. If the link points to `http://somewebsite.edu/bar.html`, then that URL will not be copied.
- Only files at the same depth or deeper in the Web site file hierarchy are retrieved. For example, if a link points to `/index.html` or `../index.html`, the file will not be copied.

This method of uploading papers cannot have a guaranteed 100% success rate. However we have been using it here at Southampton for a number of months and it usually works very well.

If something does go wrong, it’s normally best to select “delete all files” from the “Document File Upload” screen, and try another uploading method.

6.7 Deposit Verification

This page will display the abstract page for your document as it will appear in the archive. You should carefully check that all information has been uploaded correctly. Note that your paper will not appear in the “later version of” or “commentary/response” threads at the bottom of the page; this is normal.

You should also check that the document files have been uploaded correctly, including any associated figures and links. If you spot a mistake, you can use the “back” button (and other pages’ “back” buttons) to cycle back through the depositing process and fix any mistakes.

If you’re happy that everything is correct and has been uploaded correctly, click on the “Deposit” button to deposit your paper in the archive. It will then be put in the archive buffer. Congratulations; you’re contributing to the freeing of research literature!