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User Guide PHAIDRA

INTRODUCTION TO THE REPOSITORY PHAIDRA OF THE UNIVERSITY OF VIENNA

REPOSITORY MANAGEMENT PHAIDRA-SERVICES

Content

Introduction

Reading time 3 minutes

PHAIDRA (Permanent Hosting, Archiving and Indexing of Digital Resources and Assets) is the digital repository of the University of Vienna for long-term preservation and archiving of scientific materials, research data and collection objects of members of the University of Vienna (see also the FDM Policy of the University of Vienna https://rdm.univie.ac.at/de/fdm-policy-und-faq/). In PHAIDRA you can store texts, audios, videos, images and other data and make them public and reusable on demand, all objects automatically get a Persistent Identifier. The service is available free of charge to all members of the University of Vienna.

Before you start your work, please inform yourself in advance about PHAIDRA on the website of the Repository Management PHAIDRA Services Department https://datamanagement.univie.ac.at/ueber-phaidra-services/.

Before you start a file upload, please also **check the recommended formats** on our website https://datamanagement.univie.ac.at/en/about-phaidra/formats/

Please make sure that you have always clarified the rights for an object before uploading it to PHAIDRA (according to the PHAIDRA Terms of Use https://datamanagement.univie.ac.at/en/about-phaidra/user-concept-and-terms-of-use-for-phaidra/). Attention: Once an object has been uploaded, it can no longer be deleted by you. However, **you can assign access rights** and thus block an object or assign an embargo (time-limited restriction), but the metadata will always remain visible worldwide.

For first tests please use our test version, the PHAIDRA- Sandbox https://phaidra-sandbox.univie.ac.at/ . Here you can test all functionalities of the system in the network of the University of Vienna (from external via Uni VPN). Objects uploaded to PHAIDRA-Sandbox can be deleted. Please use for test uploads also objects that do not violate copyrights.

You need a valid u:account to log in. For projects we recommend to apply for a service e-mail address at ZID, which can be used by several persons. Here you can find the instructions https://zid.univie.ac.at/en/e-mail/

If you are not working or studying at the University of Vienna, PHAIDRA Depot is available for you. For more details please contact: support.phaidra@univie.ac.at

Before planning a more extensive archiving project with PHAIDRA, or uploading a larger amount of data of more than 100 GB, please contact us for an initial consultation: support.phaidra@univie.ac.at

The PHAIDRA interface has been provided with mouse-over texts that give you guidance and help you fill in the metadata fields. Please pay attention to these texts.

Carefully enter the **metadata** in the fields and use controlled vocabularies from the drop-down lists if possible, selecting controlled terms makes it easier for computers to process the dataset and find it on the WWW, at the same time it integrates datasets into the LOD network (Linked Open Data network). The metadata fields have also been designed according to the FAIR principles, i.e. the data is findable, accessible, interoperable and re-usable. If possible, please do not reduce the description of your object to the mandatory fields only - the more information you provide about the object, the clearer the context can be understood by subsequent users. If possible, make sure that at least the who-what-when-where-why questions are answered in the description. Keep in mind that you are archiving the scientific object for a long time and that the information should still be understandable in 10 years and more.

The objects are found with common search engines in the WWW. You can optimize the **findability of your objects in the WWW** a little by defining a rather short title for your object and placing the content-relevant terms at the beginning of the title and the description. Content descriptions with controlled vocabularies from drop-down lists also improve findability and free keywords please use in singular, and: provide synonyms. In image files with .bmp, .jpg or .png formats, don't forget to include the metadata directly in the file under "Properties" as well - search engines can only read text in images saved as .ai, .svg or .eps. The same applies to a PDF file - enter the name, title and keywords directly into the "Properties" of the file.

Please note that once your u:account expires (leaving the university, retirement, etc.) you will no longer be able to manage your uploaded items in PHAIDRA. However, you can request an owner change from PHAIDRA Support (support.phaidra@univie.ac.at) before your u:account expires - owner A transfers his objects to owner B - both parties must agree to the transfer of the objects in written form.

Please, support - if possible - **Open Science at the University of Vienna**, grant a free license and do not impose any restrictions on access. More about Open Science in Austria https://www.osa-openscienceaustria.at/en/

And now, start your upload with the following instructions. Good luck.

Upload New Object

To upload a new object, open the PHAIDRA start page: https://phaidra.univie.ac.at/

Log in on the top right with your personal u:account or, in the case of a project, with the LogIn data of the service e-mail address.
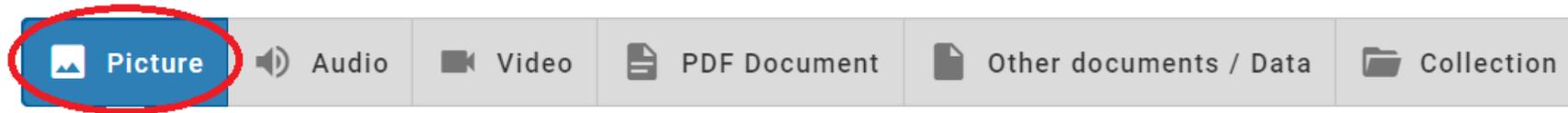
Then select "Upload" tab:

| Search | Upload | My objects | Object lists | Groups | Help | Logout |

Click on „Create new object"

⊕ **Create new object** — Upload Picture, Audio, Video, Document, Data or create an empty Collection.

Upload publication (via u:scholar) — Upload journal articles, reports, reviews, working papers, conference papers, monographs, individual chapters from monographs ...

Open template — Open a previously created upload template.

Create new template — Compose your own upload form.
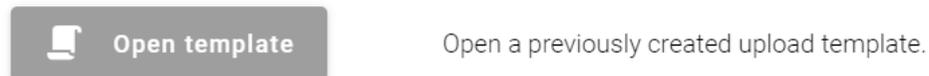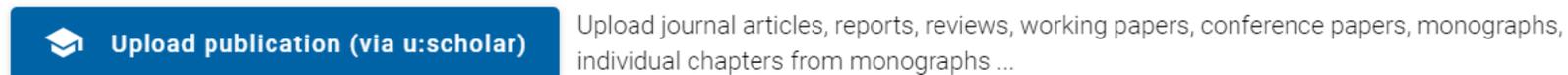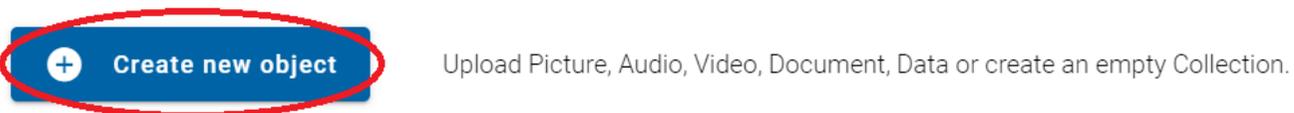
Then select the appropriate resource type for your object, e.g. "Picture":

Next step, an empty metadata form opens, now you can describe the object.

Describing objects with metadata

If you have decided on a resource type, such as "Picture", click to open the form for object's metadata, the metadata editor. You will now see empty metadata fields that you should fill out: 8 fields are mandatory and marked with *, if you do not fill out the mandatory fields, objects cannot be uploaded and saved:

File to upload *

You can use drag & drop

Type *

☐ learning object

☐ map

☐ photograph

☐ slide

☐ wall chart

☐ other

Title *   Subtitle

Description *

Keywords *

Role *   Firstname *   Lastname *   ORCID

Subject (ÖFOS) *

Association *

License *

Add metadatafield ⊕

You can either select a new object from a file folder at the top to begin, or you can fill out the metadata fields first and then select the object for upload.

With "Add metadata field" at the bottom left, you can select additional fields from a list and expand the form and thus the description of the object according to your needs. In addition, other options are available to further define your object (Terminology services, Coverage, Project, Represented Object, Bibliographic metadata), click on the arrows on the right and you will be shown the respective associated menu:
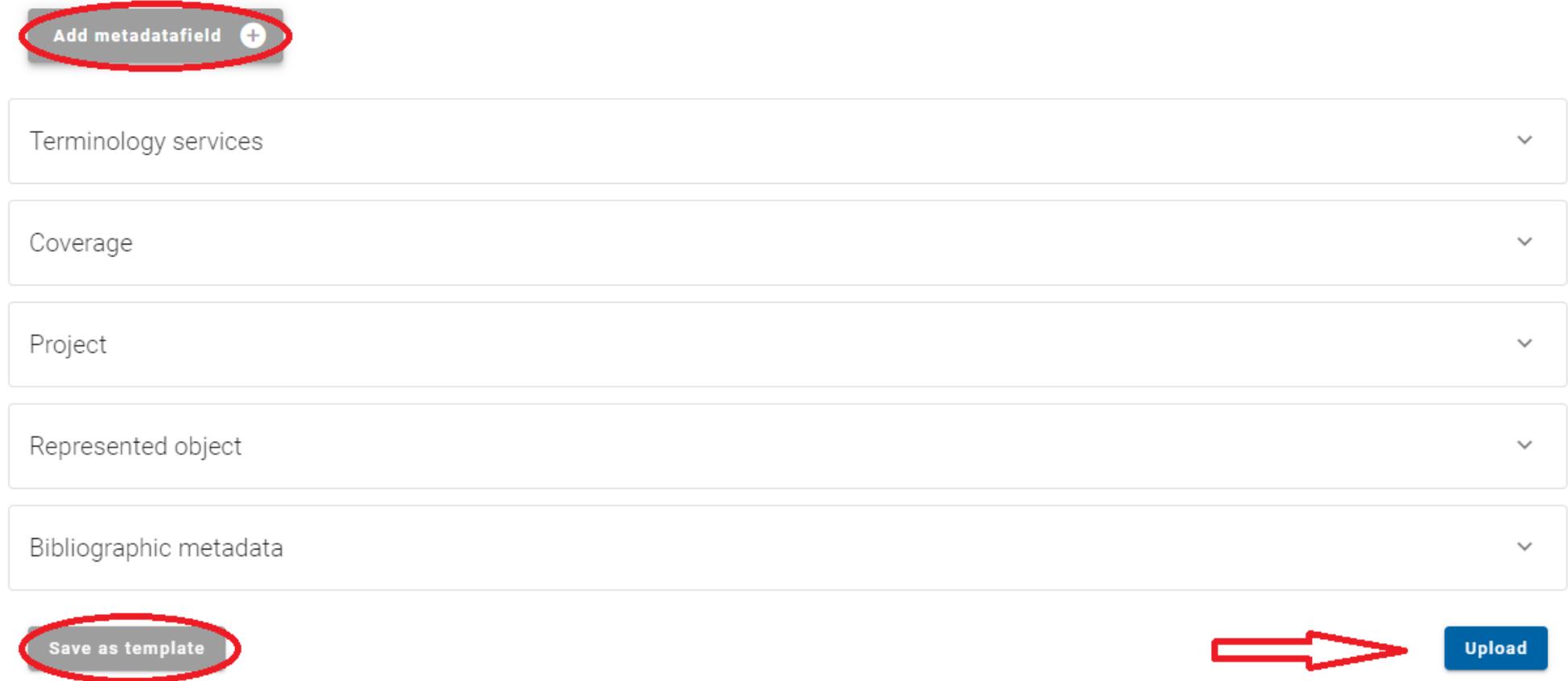
Add metadatafield ⊕

Terminology services ⌄

Coverage ⌄

Project ⌄

Represented object ⌄

Bibliographic metadata ⌄

Save as template

Upload

Repository Management PHAIDRA-Services https://datamanagement.univie.ac.at/en/ | **Contact:** support.phaidra@univie.ac.at

You can also save the completed metadata form as a template at the bottom left to have it available later for objects with the same metadata.

After selecting the file and filling the metadata fields, start uploading your object by clicking "Upload" at the bottom right. After the upload process, the saved object appears in the detail view with the descriptive metadata:
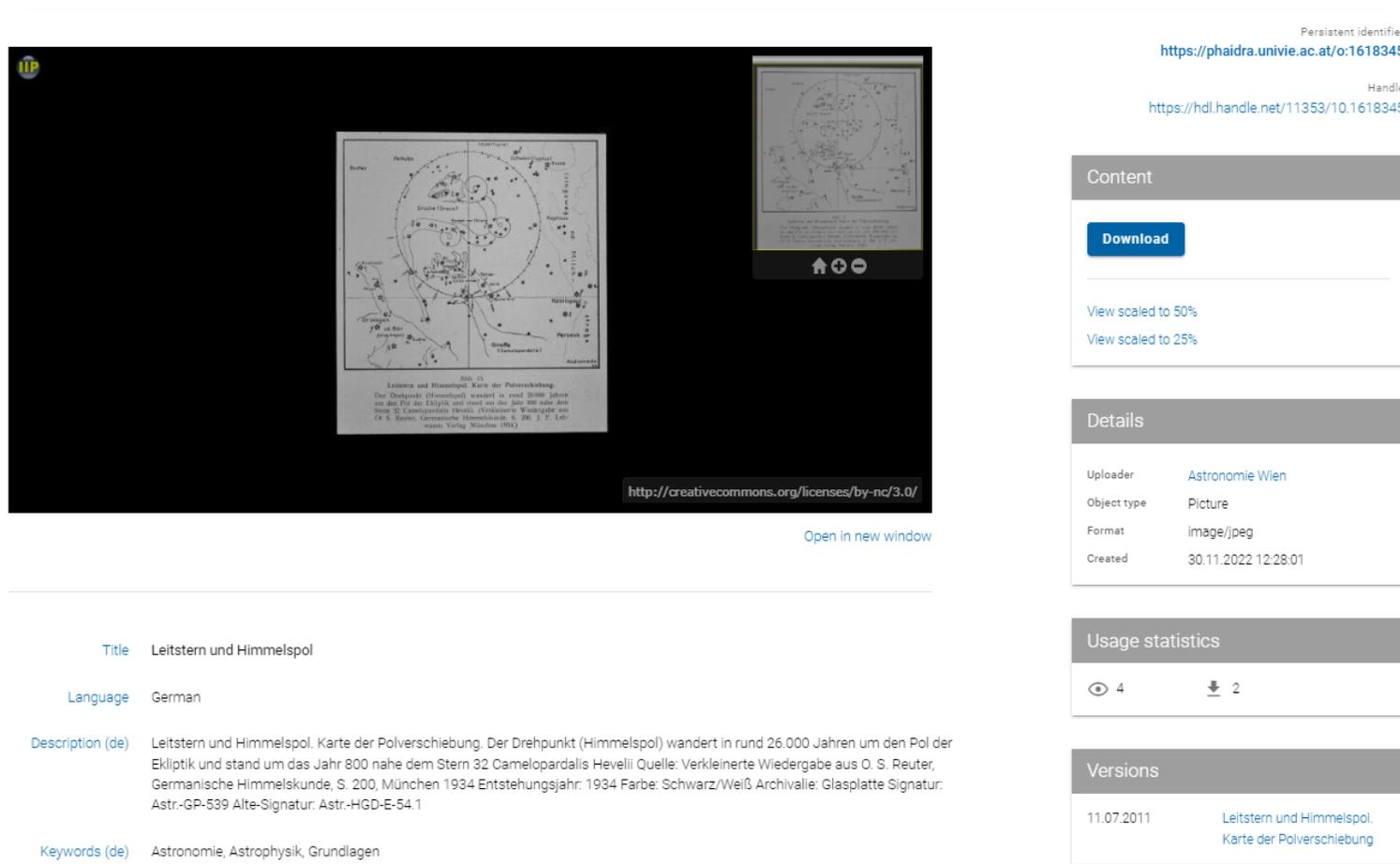
Persistent identifier
https://phaidra.univie.ac.at/o/1618345

Handle
https://hdl.handle.net/11353/10.1618345

Content

Download

View scaled to 50%
View scaled to 25%

Details

Uploader	Astronomie Wien
Object type	Picture
Format	image/jpeg
Created	30.11.2022 12:28:01

Usage statistics

👁 4   ⬇ 2

Versions

11.07.2011   Leitstern und Himmelspol. Karte der Polverschiebung

Title	Leitstern und Himmelspol
Language	German
Description (de)	Leitstern und Himmelspol. Karte der Polverschiebung. Der Drehpunkt (Himmelspol) wandert in rund 26.000 Jahren um den Pol der Ekliptik und stand um das Jahr 800 nahe dem Stern 32 Camelopardalis Hevelii Quelle: Verkleinerte Wiedergabe aus O. S. Reuter, Germanische Himmelskunde, S. 200, München 1934 Entstehungsjahr: 1934 Farbe: Schwarz/Weiß Archivalie: Glasplatte Signatur: Astr.-GP-539 Alte-Signatur: Astr.-HGD-E-54.1
Keywords (de)	Astronomie, Astrophysik, Grundlagen

Licensing Objects

Please clarify the rights to your object before you archive it in PHAIDRA for the long term (see also Terms of Use https://datamanagement.univie.ac.at/ueber-phaidra-services/nutzungsbedingungen-phaidra/). PHAIDRA offers you a variety of license models, find out about all options on the website https://datamanagement.univie.ac.at/forschungsdatenmanagement/juristisches/lizenzmodelle/

Once you have decided on a license model, select the mandatory metadata field "License" and use the arrow on the right to open the menu of license models. Attention: Please note that an assigned free license can no longer be changed!

Assign Access Rights

You can also share the uploaded object only with certain persons, groups of persons and organizational units of the University of Vienna, but the metadata of the object are always visible worldwide. You can select units or particular persons of the University of Vienna under "Access Rights":

Metadata Access Rights Relationships Preview Feedback

This object is worldwide accessible

Rule	Expires
	No access restrictions are defined

Restrict access rights to organisational units/subunits

Select organizational unit ▾   Apply

Restrict access rights to particular persons

🔍 User search ▾   Apply

Restrict access rights to particular groups

Name	
Interviews e infra plus	Apply

You can also set an access rights to a predefined group. To do this, create your own group with university members who should have access to your object, select the "Groups" tab at the top right of the menu:

Then select "New group" on the right, give the group a name and confirm with "Create":
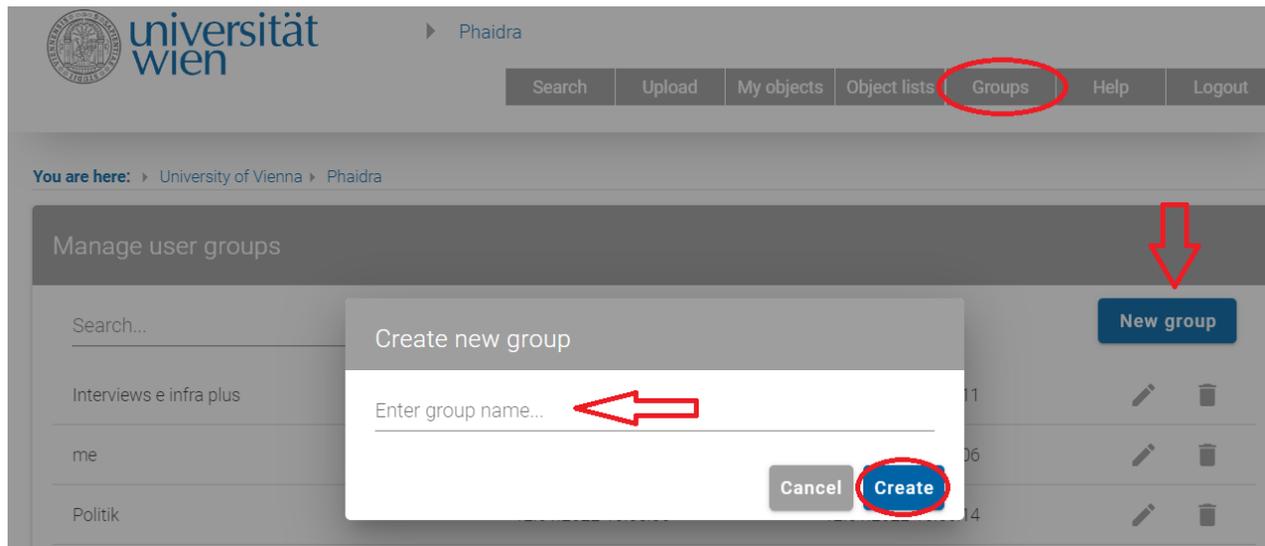
You can set an embargo (time limit for access restriction) with the calendar function under "Edit expiration date":

Create Collections

You can create a collection in PHAIDRA, in which you collect objects on a certain topic, for example. You can also combine these collections with each other, like an upper or lower collection, e.g. Collection "Cityscapes" contains as member Collection "Europe", which contains as member Collection "Italy" with the members "Rome", "Milan", "Venice" as single image objects. And this is how you create a collection: After logging in and clicking on "Create Digital Object", the option "Create Collections" appears in the upper right corner, describe the content of the collection with the metadata fields:

Then save the collection in the lower right corner. Now search for a search term and get a hit list for your collection items. Click on the small gray square at the top right of the bar and selection boxes next to the hits will be displayed. Make your choice by checking the boxes and click on "Selection" in the upper right corner, the menu opens and you can add selected hits to an already created collection or remove them:

There is also a second variant to create a collection, collect matching objects from a hit list in object lists, which are then available to you for a selection, select the tab "Object lists":

Click the "New list" button on the right and assign a name for the object list:

Now search for your objects for the created object list and select the hits for it and add selected hits to your already created object list:

Then you can add created object lists to the collections you have already created.

Design Templates

If you want to describe many objects with same metadata, you can create a template so that you do not always have to repeat the same entries. To do this, open the "Upload" tab and select "Create new template" at the bottom and fill out the metadata fields or open a template you have already created with "Open template":

Experience shows that by creating templates you are able to do about 50-60 uploads in one working day.

Editing Objects

When you have uploaded your object, the detailed view of the object opens. In this view you can see the metadata you entered and you have options for further editing your object in the bottom right corner when logged in:
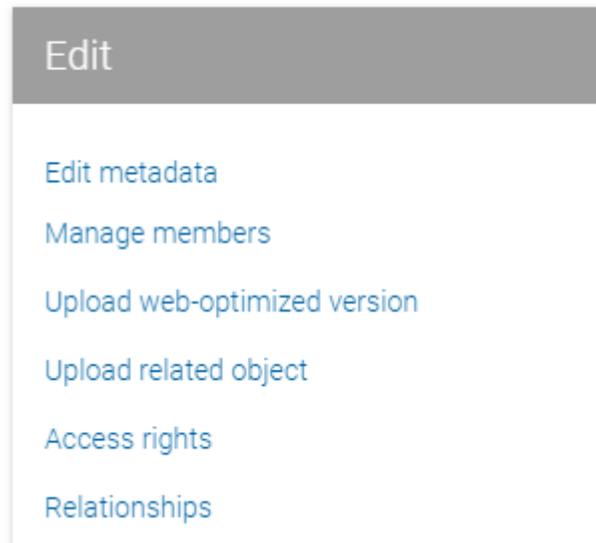

- **Edit metadata:** the metadata editor opens and you can edit the entered metadata (add, correct, …)
- **Manage members:** you manage the members of your collection(s)
- **Upload web-optimized version:** you can upload a web version with lower resolution without filling in the metadata again
- **Upload related object:** you choose from different options like object "refers to", "is backside of", "is preview image of", "is new version of", "is alternative format of" or "is alternative version of"
- **Access rights:** you can assign access rights to organizational units or members of the University of Vienna afterwards, furthermore you can select predefined groups (in the tab "Groups" on the top right) for an access authorization
- **Relationships:** you can create or remove connections to other objects

End Work

After you have filled out the metadata fields, uploaded and saved the object, please don't forget to log out in the upper right corner to finish your work in PHAIDRA:
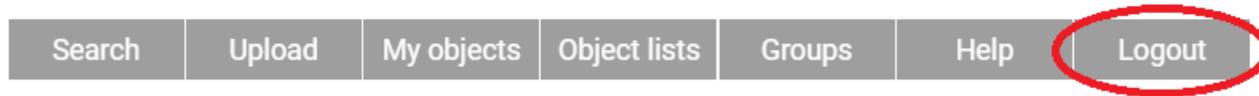
Search in PHAIDRA

If you want to search for objects in PHAIDRA, enter your search term in the search field on the start page and confirm with the ENTER key or click on the magnifying glass on the right:

If you are searching with multiple terms, please use Boolean operators AND, OR, NOT. This allows you to broaden or narrow the search: research data management AND repository finds hits that contain both terms, research data management OR repository finds all hits that contain either one or the other term, research data management NOT repository finds all hits that contain only the first term but not the second term. If you are not sure about the spelling of a term, then replace letters with ?: for example, the word sequence Dostoje?ski finds the words Dostojewski and Dostojevski. If you put a truncation with * at the end of a term, as for example with histor*, then historian, history etc. will be found. If you are looking for a specific phrase then put the terms in "", for example "research data management in Austria" will find hits with exactly this phrase. You can also combine all possibilities, in this case work with parentheses (): for example (research data management NOT Austria) AND repository will show you possible hits on international research data management with repositories. Please also note that multilingual searches are necessary if you want to find multilingual hits, for example, searching for "research data management" will not find all hits on german "Forschungsdatenmananagement".

The search in PHAIDRA is based on "The Extended DisMax Query Parser" by Apache Solr, detailed technical information can be found here: https://lucene.apache.org/solr/guide/6_6/the-extended-dismax-query-parser.html

After confirming the search term with ENTER, a hit list is displayed. You see the title of the hit, if you click on it then a detail view of the hit appears. You can sort the hit list on top right by alphabet and date, and you can copy the link of the hit list on the right:

You can narrow down a hit list for a specific search term using various filters on the right; to do so, click on the respective boxes. For example, you are looking for unrestricted text documents with a free CC BY license:

Final Notes

For any questions, **please contact us at** support.phaidra@univie.ac.at or use the feedback form in PHAIDRA.

FAQ PHAIDRA https://datamanagement.univie.ac.at/en/about-phaidra/phaidra-faq/

The Department of Repository Management PHAIDRA-Services at the University Library operates together with the Central IT Service, Department of IT Research Support, and offers even **more archiving systems for special requirements**, contact us for a personal conversation. Information about all services can be found here as an overview poster https://phaidra.univie.ac.at/o:1613991 or in the info sheet about our services https://phaidra.univie.ac.at/o:1613990 (both in german).

We are pleased, that you have chosen the repository PHAIDRA of the University of Vienna for the long-term archiving of your scientific objects and research data.