TIP: Words in italics are included in the *RADR Quick Guide: Glossary*.

Overview

When a document is uploaded information must be associated with the document. This information is called *metadata*. This metadata is used to determine a user's access to the document, what search terms can be used to search for the document, and how the document will be organized within search results. In RADR the metadata that is used to derive search terms and access are called *Primary Links*.

For more information about Primary Links please see the Quick Guide: Understanding Primary Links.

Access to Metadata

In order to add, modify, or delete a document's metadata you must have a RADR *Role* that grants access to the *Upload Type* used to upload the document. To quickly check to see if a document in your search results is one in which you can modify the metadata hover over the *Edit* icon. When you hover over the *Edit* icon a note will appear that identifies the document's *Repository, Upload Type*, and the RADR *Roles* that have access to view the document.

Documents (Doc Type="Agreement" \ Doc Name="GA20050216DB.pdf")									
Actio	ins 🔻								
Edit	<u>Group</u>	<u>Түре</u>	Document Name	Description	Doc Date	<u>Size</u>			
/h 1	Docs from Donor/Sponsor	Agreement	GA20050216DB.pdf	Gift Agreement	16-FEB-2005	119KB	8		
1 - 1 of Repo	ository: Millennium Post Award ad Type:								
DIR	Docs to Share								
Roles Contr Contr Contr	s w Access: roller's Office roller's Office - Security roller's Office - Upload								
DIR DIR - DIR - Prove	Security Upload ost's Office		E P			のため	A STA		

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Metadata

To edit metadata, including adding, modifying, or deleting a primary link, click on the document's *Edit* icon in your search results.

<u>Edit</u>	Group	<u>Type</u>	Document Name	Description	Doc Date	<u>Size</u>	
1	Docs from Donor/Sponsor	Agreement	FA19780101HWB.pdf	Fund agreement.	01-JAN-1978	3,730KB	

If you have the appropriate access to edit the document's metadata you will be able to modify the following:

Document Name

NOTE: A document name MUST have the file extension (e.g., .doc, .docx, .pdf) at the end of the name. If you do not include a file extension RADR will automatically add it to the entered Document Name when you Apply Changes.

- Description
- Document Group
- Document Type
- Document Date
- Access (Confidential or Non-Confidential)
- Primary Links

The following metadata cannot be updated as the data is populated by RADR:

- Size (of document)
- Repository (can only be changed by changing the Upload Type)
- Upload Date
- Uploaded By
- Last Update Date
- Last Updated By

ocument		_			_	_	_
Jpload Type: DIR [locs to Share						
					Cancel	Delete	Apply Changes
Document File:	Download						
ocument Name:	FA19780101HWB.pdf				Size: 4 Renository: [I MB)IR - Millennii	im Post Award
	Fund agreement.			~	Upload Date: 1	1-DEC-2013	
Description:				4	Uploaded By: 0	Condou, Steve	en G (Steve)
1				1.	Last Update Date: 1	1-DEC-2013	
ocument Group:	Docs from Donor/Sponsor V				Last Updated By: 0	Condou, Steve	en G (Steve)
Document Type:	Agreement				Document Date:	01-JAN-1978	
					Access:	Confidenti	al
						O Non-Confi	dential
1997. 1998				370	DAMERO	17 327	TARY .
imary Link			Derived Search Ter	ms			
-							
Millenniur	n ID 0000142738		Search Value				
Delete Link	Add Link		Donor Name Horac	e W. an	d Vicki S. Baker Fund	for the Calter	ch Y

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Editing Primary Links

Primary Links are associated with documents as a way to derive both search terms and user access.

More than one link can be associated with a single document. For example, if the document is backup for a cost transfer, then both Award-Project combinations associated with the cost transfer can be linked to the document. In addition, a document can be linked to more than one type of link, for example, both an Oracle Award Number and a Millennium ID.

Some links are used for search purposes only, while *Primary Links* derive additional search terms and account-level security.

Adding a Link

To add a link:

1. Click on the *Add Link* button in the Primary Links section, which will activate the *Select Link* list of values.

Primary Link	Derived Search Terms		
Millennium ID 0000142738	Search Value		
Delete Link Add Link -1	Donor Name Horace W. and Vicki S. Baker Fund for the Caltech Y		

2. Select the appropriate link.

NOTE: Types of links available are associated with the Upload Type.

Primary	Link	
	Millennium ID 00001	42738
Delete	Select link Award - Project Award Number Conversion GL Fund Segment Millennium ID	← 2

3. Click on the *Search* icon to open up a search window to find the appropriate value. **NOTE:** The value entered for a Primary Link MUST be entered EXACTLY as it is entered in the source system (e.g., Oracle Grants Accounting).

Primary Link			
Millennium ID		000142738	Q
Award	Number		 Q
Delete Link	Add Lir	ık	3



4. Enter your search term, click on the *Search* button, and click to select the appropriate link from the search results.

NOTE: You do not need to enter a wildcard (%) on this search window.



5. The link will automatically appear in the Link field.

Primary Link	Derived Search Terms		
Millennium ID 0000142738	Search Value		
Award Number ENDOW.000137	Donor Name Horace W. and Vicki S. Baker Fund for the Caltech Y		
Delete Link Add Link 5	1-1		

6. To save you Link entry click on the *Apply Changes* at the top of the form.

Upload Type: DIR Docs to Share		
	Cancel	Delete Apply Changes
Document File: Download		5
Document Name: FA19780101HWB.pdf	Size: 4 M	B

7. Once you Apply Changes the derived search terms will be associated with your document.

Primary Link		Derived Search	Derived Search Terms				
Millennium ID	0000142738	Search	Value	Derived From			
Award Number	ENDOW.000137	7 Donor Name	Horace W. and Vicki S. Baker Fund for the Caltech Y	Millennium ID: 0000142738			
		GL Fund Segme	nt 16080192	Award Number: ENDOW.000137			
		Owning Org	HSS Division Administration	Award Number: ENDOW.000137			
		PI Name	Younger, Candace A	Award Number: ENDOW.000137			
		Project Number	HSS.BAKER	Award Number: ENDOW.000137			
		Project Number	HSS.MTI	Award Number: ENDOW.000137			
173		Source Award Number	9900050	Award Number: ENDOW.000137			

Modifying a Link

To modify a link:

- 1. Click on the *Search* icon.
- 2. Choose a new value.
- 3. Click on the *Apply Changes* button at the top of the form.

Deleting a Link

To delete a link:

- 1. Select the link you would like to delete by checking on the box next to the Link.
- 2. Click on the *Delete Link* button.
- Click on the *Apply Changes* button at the top of the form.
 NOTE: If you need to both *Delete* a link and *Add* a link *Apply Changes* after one action and before the other.