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 Action		ment" \ Doc Nar	ne="GA20050216DB.po	df"')	_		
Edit	<u>Group</u>	Туре	Document Name	Description	Doc Date	Size	
	ocs from Donor/Sponsor	r Agreement	GA20050216DB.pdf	Gift Agreement	16-FEB-2005	119KB	۵
1 - 1 of Repos DIR - N	itory: Iillennium Post Award						
	d Type: ocs to Share		· 川 八字(字) 《文明》是				
	w Access: Iler's Office						
Contro	Iler's Office - Security Iler's Office - Upload						
DIR - S DIR - U	Security Jpload t's Office		- 7				

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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	0

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		
Upload Type: DIR D	Docs to Share	
		Cancel Delete Apply Changes
Document File: [Download	
Document Name:	FA19780101HWB.pdf	Size: 4 MB Repository: DIR - Millennium Post Award
[Fund agreement.	Upload Date: 11-DEC-2013
Description:		Uploaded By: Condou, Steven G (Steve)
		Last Update Date: 11-DEC-2013
ocument Group:	Docs from Donor/Sponsor V	Last Updated By: Condou, Steven G (Steve)
Document Type:	Agreement	Document Date: 01-JAN-1978
		Access:
		O Non-Confidential
NY ANY		
rimary Link		Derived Search Terms
Millenniur	m ID 0000142738	Q Search Value
	Add Link	Donor Name Horace W. and Vicki S. Baker Fund for the Caltech 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					
Millenn	ium ID 0	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		
Document Name: FA19780101HWB.pdf	Size: 4 MB	U

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

Primary Link		Derived Search Te	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 Segment	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		
		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.