ORCA: A Quick Guide

This guide will show you how to add your publications to Cardiff University's institutional repository**, ORCA**. More help and guidance can be found at **How to Add Research** on the ORCA homepage at http://orca.cf.ac.uk/

This is a guide to using the full ORCA deposit process. This is the best way to deposit for non-standard outputs e.g. compositions, websites. For quick deposits using DOIs and Web of Science imports, we recommend using the Manage My Publications tool in the intranet. Follow the path Research Support > Open Access > Manage My Publications.

If this is your first time using ORCA and Manage My Publications, please check ORCA for your publications before you begin as some may have already been added. To see a complete list of the publications you have in ORCA use the **Browse** option on the left hand menu on the ORCA home page, choose the **Current Cardiff Authors** link and select your name from the alphabetical list. If your name is not listed there it should mean that you have no publications currently in ORCA.

Logging in

- Go to the ORCA web page http://orca.cf.ac.uk/ .
- Click on **User Area Login** on the left hand side and enter your network username and password.
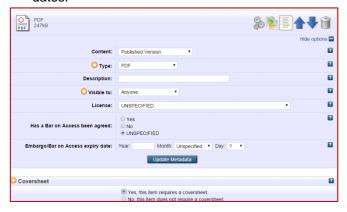- You are now in your **Work Area**. Click on **New Item**.

Screen 1: Item type

- **Article** is the default description. If you are entering an article, you can go to the next screen. Otherwise, select the description which best describes your publication. If in doubt, choose **Other**.
- Click on the blue **Next** button at the top right of the page.

Screen 2: Upload

If you are not uploading a full text file, you can skip to the next page.

- To attach full-text, click on the **Browse** button in the File tab. Select the correct file from your file space, and click **Upload**.
- When the item is uploaded, click on the **Show Options** plus sign on the right hand side of the form. In the dropdown menu next to **Content** select the version type (e.g. Published), select the **Format** type (e.g. PDF), who the file should be visible to (e.g. anyone/repository staff only) and enter any embargo dates.

- Note: if the text needs to be embargoed, it should be restricted to **repository staff only.**

- You also have the option to add a Creative Commons license. If you are unsure, leave as UNSPECIFIED.

- For the coversheet field, select Y**es** if you are adding a pre-print or post-print, and **No** if you are adding a published version.

- Click on the **Update Metadata** button. Then click **next.**

- Fill in all the fields that you can.
- Fields with a star inside an orange circle are compulsory.
- Click on the question mark symbols on the right hand side of the form for additional help, e.g.

- List all authors in the order they are listed in the publication. Use a new line for each author. If the author is from Cardiff University, the name will auto-complete with the email address and unique ID number. If there are multiple authors, click the blue **More Input Rows** button and this will bring up extra rows.
- For articles that fall into the current REF period, the **date of acceptance field** as well as the **date of publication field** should be filled in.
- If the publication has been funded, please fill in the **Funders** field. If there are multiple funders, add each one on a new line. If the publication is the outcome of a project, please fill in the **Project** field with the name and/or number of the project. Click the blue **More Input Rows** button and this will bring up extra rows.
- Click on **Next** once you have completed all the relevant fields.

- You can add a subject if you find it listed, but these details can also be completed by the ORCA team. Click on the Plus button at the side of each subject heading to open up the list.
- Add as many as are relevant. If you are unsure, go with the broadest scheme i.e. B Philosophy (General) or leave out.
- In the Schools field, add your Cardiff University School – for joint research outputs please add all the relevant Schools and Research Centres that apply. A research centre must be aligned with a school e.g. Cardiff Catalysis Institute with Chemistry. This field is compulsory.
- Click on **Next**.

- The item is still in your work area and will remain so until you deposit it in ORCA.
- If you are happy with your entry, click on **Deposit Item Now**. The item now goes into the Review area to be checked by the ORCA team.
- If you still need to work on the entry, choose **Save for Later**. This will save the item to your Work Area where you can go back and re-edit.

> Note that you cannot make any changes to this item once it is moved to Review. If you discover you do need to make changes, please contact the ORCA team at orca@cf.ac.uk.

> For help in using Manage My Publications and ORCA, please email orca@cf.ac.uk or call us on (029) 2087 6123. The Open Access team can also help with OA queries on openaccess@cf.ac.uk, (029) 2087 0965. Please see the Open Access help pages on the intranet under Research Support.
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> Your Subject Librarian can also assist you. Please see Subject Support in the Library Services for Researchers pages in the staff intranet.