Video Transcript: SelectedWorks - Creating and Managing SelectedWorks

Video Duration: 13 minutes, 59 seconds

[Opening card]

Hello! In this video, we cover the creation and management of profiles for your institution via the SelectedWorks Administrative Interface. The Administrative Interface allows you to access and manage all profiles for your institution, as well as settings and reporting tools.

Links to our Administrative Interface video and other helpful resources are available on our website.

[Admin Interface landing, Profiles tab selected]

After logging in, click on your institution's name from the Profile Menu to access the interface.

All profiles listed on the Profiles tab are affiliated with your institution. View at a glance if they are live or hidden, and whether they are included in your SelectedWorks and Expert Galleries.

To create a new profile, click on the blue Create New Profile button.

["Create New Profile" prompt]

When prompted, enter the author's email address, enter the full name, and click the Build Profile button.

["Build your SelectedWorks" prompt]

First, choose a URL. A URL is suggested based on the name you entered in the previous step; however, you can customize this as necessary. At least two characters are required. If a URL is already taken, the field will highlight in red and note that a different URL is required.

Next, choose at least one Discipline. You can browse through all disciplines, or quickly narrow down results by using the search box above the list. Simply check the discipline(s) of your choice.

Finally, select the Position from the drop-down list and then enter the full position title as you wish it to appear on the profile. Make sure you check the box next to "I agree with the Terms of Service" and click the blue Go button.

[Clicks Go button to pull up newly created profile]

All newly created profiles are hidden by default until you make them live via Account Settings, which we will cover in detail shortly.

After creating a profile, you will automatically impersonate the profile's author. This grants you full access to all profile content, including account settings and Author Dashboard.

[Back to Profiles tab of Admin Interface]

To access an existing profile, simply click on the author's name from the list.

[Clicks an author name to access an existing profile]

A green header appears at the top of the profile that reads "you are currently acting" as the author. If you wish to go back to your account and Administrative Interface, click on the blue "Back to your account" button.

Once you access a profile, you can easily add, update, and remove content as necessary. Each profile has three basic areas: the Introduction, the Works tab, and the About tab. Simply hover your cursor over each area within those sections to reveal inline editorial icons. These icons provide quick access to allow you to make changes in real-time.

The introduction acquaints visitors with the author, and should include a descriptive summary of their background and work. There is no character limit. Longer author biographies include a Read More option that visitors can expand without obstructing view of the works below.

Basic formatting options are available, including bold and italicized text, and hyperlinks.

[Clicks pencil icon to show editing tools and then closes]

To add or edit a profile photo, click on the camera icon. When adding a picture, click "Select a photo from your computer". The Choose File prompt is used throughout SelectedWorks to upload content. The prompt provides additional upload source options, including direct links, Box, Dropbox, Flickr, and Picasa.

[About tab]

On the About tab, hover over the Positions section and click on the blue pencil icon to edit. By default, this entry will be pre-filled based on the information provided during the site build.

If applicable, enter an organization the author is a part of at your institution, such as a department, law clinic, research office, library, etc. As administrator you can standardize the way authors describe these organizations by accessing the Organizations & Roles tab of your administrative interface.

You can add as many positions as necessary. The one marked as the Current Position will show first. When "Affiliate my profile with this Institution" is checked, the profile will receive the institution's branding and colors, and you can access and manage it via the administrative interface. If you remove this affiliation, the profile will no longer have the institutional branding and colors, and you will no longer have access to the profile.

Be sure to add as much applicable information about the author to each section as possible, including uploading a CV, modifying or adding Disciplines; adding Research Interests, Honors and Awards, Courses, Education, links to a personal website or faculty profile, Contact information, and social media accounts. Only those areas populated with content on the About tab will appear to visitors; there are no empty headers.

Rich profile content maximizes discoverability of your SelectedWorks and Expert Galleries, and reporting tools in your Impact Dashboard.

[Switches to example Expert Gallery]

Note that Disciplines and Research Interests will link to your Expert Gallery and also serve as search facets for visitors.

[Back to author profile, Works tab]
On the Works tab, add content by clicking on the Add Work drop-down list. There are five main options: Upload a file, Add a Link, Add metadata only, Import Works, or Select from My SW Drive.

[Clicks "Add Metadata" option]

The first step when adding work is to choose the Type of Work. The comprehensive list of work types includes Research and Teaching works. Metadata fields change automatically to accommodate the type of work selected.

[Selects "Article" for Type of Work to reveal submission form for articles]

Any field that's required is marked with a red asterisk.

When you upload a file, the first page will be used as a thumbnail image for the card view on the Works tab. You can upload a different image to use as a thumbnail as desired. Once you complete the details form, click Add to Profile to post, or Cancel to save it as a draft to the author's My SW Drive, which we will cover shortly.

[Back to Works tab]

If the author has work published elsewhere in bepress, including Digital Commons and bepress hosted journals, you can import them into the profile.

[Clicks "Import Works" in Add Work menu to show Import Works dialog box]

Check the box next to "Include previously reviewed content" to ensure all works are shown. Add to the profile by selecting both the Type of Work and the Display Category, and click Import.

[Closes Import Works dialog; returns to Works tab]

Finally, you can add work by accessing the author's My SW Drive.

[Highlights "Select from My SW Drive" link in Add Work menu; selects "My SW Drive" from alternate location in main menu. My SelectedWorks Drive screen shown.]

All works posted, saved as drafts, or withdrawn are housed here. Drafts and even previously withdrawn works can be posted to a profile by accessing the drive.

[Back to Works tab]

You can modify or update the author's work, either through their SW Drive or back on the SelectedWorks page by simply hovering your cursor over the work in question to reveal the blue pencil icon. To withdraw, click on the trash can icon.

Once content is removed from a profile, the URL remains with a note stating: "This work is no longer available." The same URL address is used if the work is re-posted.

You can also choose the layout and the order of content on the Works tab by clicking the Manage Categories link. Order Display Categories by drag and drop, and add a description of each category as well. To add a new category, click the Add New link on the bottom of the form.

Also, the default Card View, which supports rich multimedia display, can be switched to a List View via the profile Account Settings.

[Selects profile Account Settings in upper-right main menu]

Click on the Account Settings link from the Profile menu to manage Author Information, Profile Visibility, Works Display, and Email Notifications.

If the author has any work published across the bepress product suite under a different name and/or email address, enter it under the Author Information section to ensure it's listed when locating other content via the Import Works feature. Also, set which author name and email is preferred so this information is automatically used when uploading work.

Under Profile Visibility, mark an author's profile live or hide it from public view. Remember that any new profiles you create via the Administrative Interface are automatically hidden until you make them live.

A profile can be re-hidden even if it was previously live; however, once hidden, visitors to the profile will see a 404 error. While impersonating the author, a note will appear above the introduction stating: "This profile is hidden. Make it visible in your Account Settings."

As mentioned, you can also choose between one of two layout options: the default Card View, or List View, under the Works Display section.

Finally, authors can decide whether or not to receive a monthly email about downloads for their articles and/or a daily email for unread notifications. If authors choose to skip the monthly hit report, they can continue to track their downloads via their Author Dashboard.

Likewise, unread notifications can be reviewed by clicking on the bell icon next to the profile menu.

[Selects Notification Center via bell icon]

The system tracks any changes made to a profile via the Notification Center.

Any change made to a profile by you, another admin, the author, or profile delegate, is tracked in the Notification Center. If a red circle with a number in it appears on the bell icon, there are notifications to be reviewed.

Users can either keep these notifications after reviewing or clear out. When notifications go unread for more than 24 hours, an email is automatically generated to the author. The Notification Center also serves as a tool for administrators by showing them all profile activity.

[Selects Access Management via upper-right main menu]

The Access Management tool allows authors and admins to delegate one or more individuals to a profile. For example, a faculty member may wish to provide an assistant access to their profile to manage; or you, as administrator, may wish to add another admin to selected profiles rather than granting them full access to all profiles via the Administrative Interface.

[Selects Follow Management via upper-right main menu]

Next, Follow Management shows the authors, publications, institutions, and/or specific disciplines the author is following. The Follow feature allows users to receive a weekly email of new content related to their interests by clicking on the blue Follow button that appears throughout the bepress product suite.

[Selects Author Dashboard via upper-right main menu]
The Author Dashboard is a personalized reporting tool, providing authors insight into the readership of their work. View an author's download information, including interactive Readership Map, and Country and Institution information. You can also drill down for additional details.

[Switches to Impact Dashboard]

Finally, administrators are also provided the Impact Dashboard. The Impact Dashboard serves as an interactive tool to help you visualize activity across your institution's profiles. Access your Impact Dashboard via the Reports tab on the Administrative Interface or through your Profile Menu. For more information about the dashboard, please see our Impact Dashboard guide on our website.

[Closing card showing contact info, sw-support@bepress.com and (510) 665-1200, option 2]

If you have any questions or need any assistance creating and managing profiles, please contact Consulting Services.