

Adding your thesis to ORCA

This step by step process will guide you through the process of adding a thesis screen by screen.

What do I need in place before starting the upload?

1. The final, approved version of the thesis, after any corrections have been made.
2. A completed Electronic Thesis and Dissertation Publication Form.

This form must be completed **and signed** prior to the thesis being deposited into ORCA. The signature must be **handwritten**, not typed or digital. The other sections to be filled in (name, degree award, funder, etc.) can be typed. The form can be found on the [Student Intranet](#).

3. If a temporary bar on access is required, make sure the paperwork has been completed, signed and sent to Registry. Bars on Access applications need to be approved before the upload to ORCA.

Some things to note about Bars on Access:

- a. A Bar on Access relates only to the full text of the thesis; it does not cover the title or abstract of the thesis as well. The author is expected to provide an abstract for the record. They have the option to provide a rewritten one that is suitable for public view and does not mention any sensitive information.
- b. If a Bar is granted, the thesis cannot be downloaded from ORCA by anyone during the period of the Bar; that includes the author and the supervisor(s). If the author wishes to share the thesis privately with colleagues during the period it is restricted, they must make sure they have their own digital or print copy.

Other considerations


1. The author can select a Creative Commons licence for the thesis which determines the kind of reuse that can be made of the work when it is read and downloaded by others. For more information about these licences, see <https://creativecommons.org>.
2. The author must ensure that any permissions required for third party copyright have been obtained. The [Copyright and your eThesis](#) page in the Student Intranet has more information, and they can also contact the Library Copyright team at copyright@cardiff.ac.uk

Uploading the thesis to ORCA

Go to www.orca.cf.ac.uk.

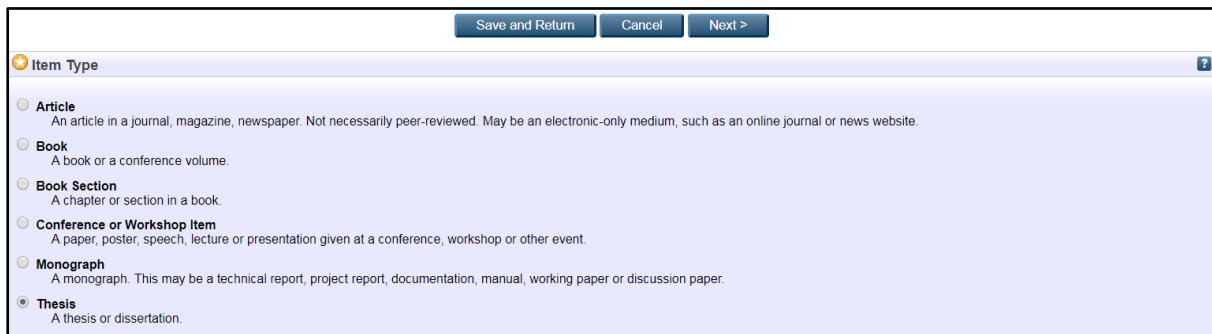
Click the **User Area Login** tab on the left hand side, and log in with your Cardiff University username and password. An account will automatically be created for you.

When you have successfully logged in, click on **Manage Deposits** on the horizontal tool bar at the top of the screen. In the Manage Deposits screen, click on the blue **New Item** button.

In all screens, mandatory fields are indicated with the  symbol.

Screen 1: Item Type

You will see a list of item types. Select 'Thesis' and then click on the blue Next button.



The screenshot shows a window titled 'Item Type' with a search icon in the top right. At the top, there are three buttons: 'Save and Return', 'Cancel', and 'Next >'. The main area contains a list of item types, each with a radio button and a description:

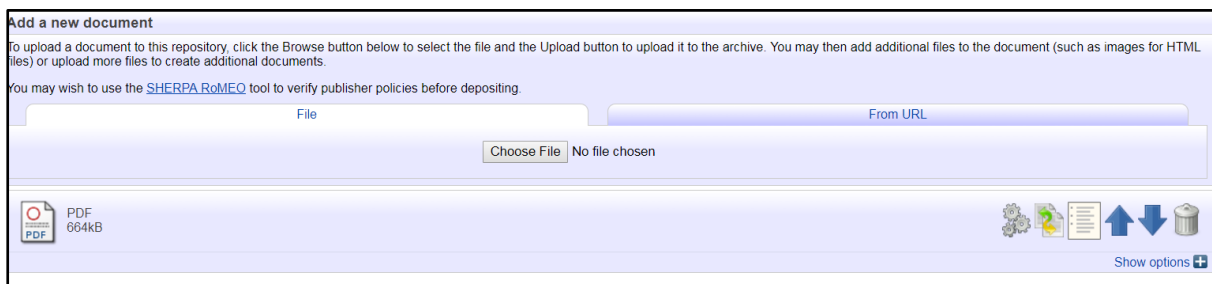
- Article**
An article in a journal, magazine, newspaper. Not necessarily peer-reviewed. May be an electronic-only medium, such as an online journal or news website.
- Book**
A book or a conference volume.
- Book Section**
A chapter or section in a book.
- Conference or Workshop Item**
A paper, poster, speech, lecture or presentation given at a conference, workshop or other event.
- Monograph**
A monograph. This may be a technical report, project report, documentation, manual, working paper or discussion paper.
- Thesis**
A thesis or dissertation.

Screen 2: Upload

This is where you upload the main thesis file and the Electronic Publications Form. Any supplementary files, such as appendices or images, may also be uploaded here.

To upload, click on the grey Choose File button (Chrome) or Browse button (IE/Firefox)

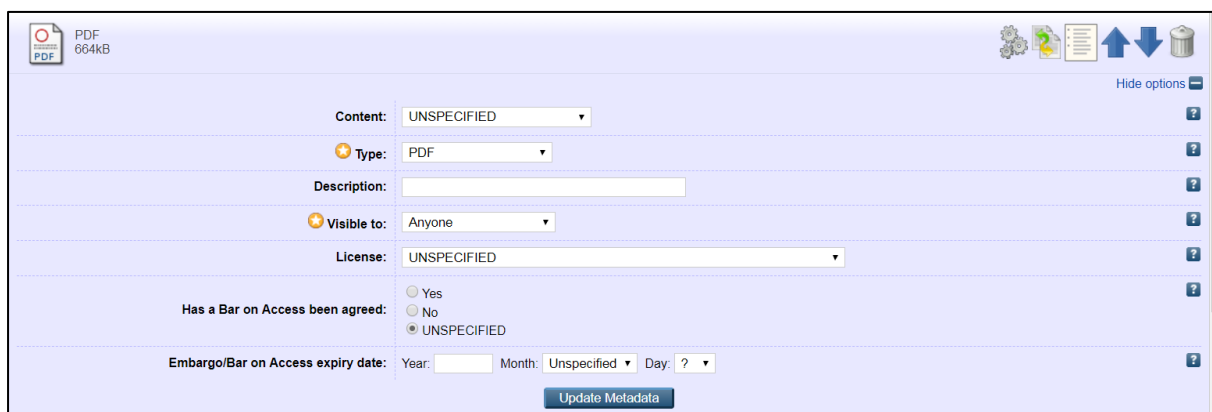
Select the appropriate file. When the file is uploaded the following screen will appear:



The screenshot shows a window titled 'Add a new document'. It contains instructions: 'To upload a document to this repository, click the Browse button below to select the file and the Upload button to upload it to the archive. You may then add additional files to the document (such as images for HTML files) or upload more files to create additional documents. You may wish to use the [SHERPA RoMQ](#) tool to verify publisher policies before depositing.'

Below the instructions are two tabs: 'File' and 'From URL'. Under the 'File' tab, there is a 'Choose File' button and the text 'No file chosen'. At the bottom left, there is a file icon for a PDF document named 'PDF' with a size of '664kB'. At the bottom right, there are several icons (a gear, a document, a folder, and a trash can) and a 'Show options' button with a plus sign.

To describe the file and add any embargo lengths or licence information, click on the blue 'Show Options' button. The following options will appear:



The screenshot shows the 'Show Options' form for the uploaded document. It contains the following fields and options:

- Content:** UNSPECIFIED (dropdown menu)
- Type:** PDF (dropdown menu)
- Description:** (text input field)
- Visible to:** Anyone (dropdown menu)
- License:** UNSPECIFIED (dropdown menu)
- Has a Bar on Access been agreed:** Yes, No, UNSPECIFIED
- Embargo/Bar on Access expiry date:** Year: (text input), Month: Unspecified (dropdown), Day: ? (dropdown)

At the bottom of the form is an 'Update Metadata' button. On the right side, there are several icons (a gear, a document, a folder, and a trash can) and a 'Hide options' button with a minus sign.

For the main thesis file the following should be completed:

Content: *Accepted Post-Print*

Type: PDF (it should automatically default to this)

Description: Blank

Visible to: *Repository staff only/Anyone*

- If the thesis can be immediately available to all, select **Anyone**
- If the thesis has an agreed bar on access, select **Repository Staff Only**

PLEASE NOTE: The default status is that the thesis will be immediately available to all. If the thesis is to be embargoed, you must indicate so by restricting it as above.

License: See above for information about licences. If you do not wish to add a licence, leave as UNSPECIFIED.

Embargo expiry date: Embargos run from the date the thesis is deposited in ORCA.

The publication form should be uploaded next. Follow the same process to upload as above. Describe the file as follows:

Content: *Supplemental Material*

Type: PDF

Description: Blank


Visible to: *Repository staff only*

License: Unspecified

Embargo expiry date: Blank

The publication form is always kept restricted. It should never be visible to the public.

Uploading any additional files

Although we specify that permission forms and thesis documents should be in PDF format, supplementary files and appendices are accepted in any format supported by EPrints. To check which formats are supported, click on the dropdown arrow next to  **Type**.

Screen 3: Details

Title: Please add the title of the thesis as it appears on the front cover of the title page.

Abstract: Copy and paste the abstract into this field. As noted above, if the thesis has a Bar on Access and the abstract contains sensitive information or confidential results, you can submit a rewritten version here.

Thesis type: Select thesis type that best describes the thesis. Use Other if the thesis type does not appear on the list of options available.

Creators: This is the author of the thesis.

When you start typing in the last name and first name of the author, it should auto populate and you can select the author details from the dropdown list. It will then automatically fill in the email address and ID of the author as in the screen shot below:

	Family Name	Given Name / Initials	Email	Unique ID
1.	Harrington	Louise	HarringtonLE1@cardiff.ac.	A002228D
2.				
3.				
4.				

More input rows

If the author has left the University and no longer has a valid email address and ID, just fill in these fields manually.

Publication details

Dates: Please enter the date the thesis was completed as shown on the front page of the thesis document, **not** the date it is being submitted to ORCA. Select 'completed' from the 'Event' dropdown menu (see screenshot below)

	Date	Event
1. Year: 2018 Month: December Day: ?	Completed	

More input rows

Institution: Cardiff University (not the individual school)

Number of pages: The number of pages in the thesis.

Open access status: You can leave this blank. It will be completed by the repository team in review.

Related URLs: Please leave blank.

Funders: Enter details of any funders here. If you have more than one funder, please enter them on a separate line. To create another line, click the blue 'More input rows' tab.

Projects: If the PhD was part of a specific funded project, you can enter the project name or number here.

Contact email address: Leave blank.

References: Leave blank.

Language other than English: If the thesis is written in a language other than English, you can use this field to indicate that language.

Additional information: This field is normally blank, but if there is any other information you would like to add to the record that you are happy with anyone accessing it to see, you can add it here. Please note that this field is publically visible.

School Reference Number: Blank.

School Research Notes: Blank.

Comments and suggestions: You can add notes here that will be of use to the repository team. This field is not visible to visitors to the ORCA site.

Screen 4: Subjects and schools

Subjects: You can choose one or more subjects from the options available to describe the content of the thesis. This is not a compulsory field.

Schools: Select the school(s) the author is affiliated with.

Deposit

You are now ready to deposit.

Click **Save and Return**. This takes you a preview screen where you can see what the record looks like. If you need to make changes, you can do so by going back into the Details tab, and clicking the blue Edit item buttons on the left hand side.

Checklist

Has the final, approved and corrected thesis file been uploaded?	
Has the completed and signed Electronic Thesis and Dissertation Publication form been uploaded?	
If a Bar on Access is required, has the relevant paperwork been submitted and approved?	
If so, has the Bar been indicated on the Upload screen?	
Have any supplementary files (images, appendices) been uploaded, if required?	

If you are ready to submit the thesis to ORCA, click the blue **Deposit** button and then click Deposit item now. You will see a message on the screen saying: *'This item is in review. It will not appear in the repository until it has been checked by an editor'*.

The thesis will now be checked by a member of the repository team. When the thesis has been moved to the live repository, the depositor will receive an email giving a link to the thesis. Please note that the email will always be sent to the depositors' Cardiff University email address.

Please check the link to make sure that all details are correct.

For help and advice on uploading to ORCA, contact us on orca@cardiff.ac.uk or ring x76123.

For queries about bars on access or extending bars on access, please contact Registry at PGR@cardiff.ac.uk