

UTK TRACE

Collection Manager Guide

A collection is a series of works in TRACE managed by a department or program. Collection Managers (or “Administrators”) typically perform five functions:

1. [Activate/deactivate submission forms](#)
2. [Approve and post submissions](#)
3. [Create a submission on behalf of others](#)
4. [Revise an existing submission](#)
5. [Remove/Withdraw a submission](#)
6. [Edit collection page intro contents](#)
7. [Troubleshooting / FAQ](#)

Click each function to jump to the corresponding How-To. For help with other functions in TRACE, visit www.lib.utk.edu/tracesupport/ or [Digital Commons Support](#).

STEP 1 (FOR ALL FUNCTIONS): LOG IN & ACCESS TOOLS

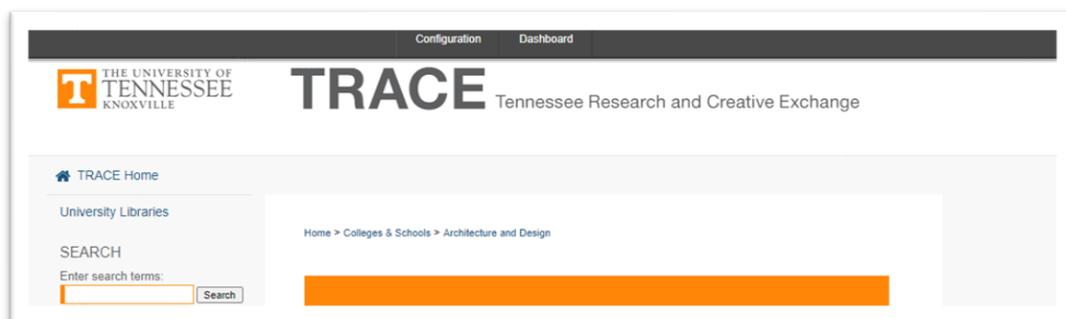
*To perform any function in this Guide, you must first **log in to TRACE** and **access the Collection Manager tools**.*

Step 1. Go to trace.tennessee.edu.

Step 2. Click “My Account” from the left-side navigation bar.

Step 3. Log in using your TRACE username and password (while your TRACE account is separate from your UTK Net ID, for consistency it is recommended you use your UTK-affiliated email to set up your TRACE account as well).

Step 4. Navigate to your collection. The collections you manage will be listed on your “My Account” page. You can also access your manager tools on the individual collection pages by clicking “Configuration” in the dark gray bar at the top of the screen (see screenshot below):



If you do not see your collection listed under “My Account”, or if the gray band is not visible at the top of your collection page, email trace@utk.edu.

ACTIVATE/DE-ACTIVATE COLLECTION SUBMISSION FORMS

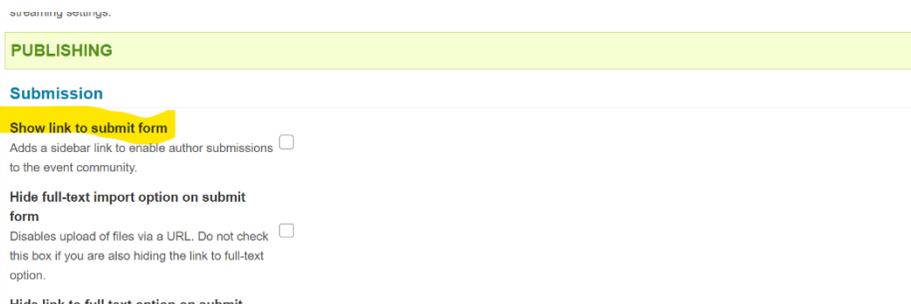
Collections receive submissions from outside authors in one of two ways:

1. Via the **Submit Your Work** link on the TRACE home page (where they select the right collection from a list of all collections); or
2. Via the **Submit Your Work** link directly on the collection page, which links to a form specific to that collection.

As a collection manager you can control the ability for others to submit to your collection through the Submit Your Work link. Some Collection Managers choose to always keep the window for submissions open. However, if you wish to only have the submission form active during certain times, follow these steps to activate/deactivate the form.

Step 1. Log in to TRACE, navigate to your collection, and access your Manager tools via the **Configuration** screen (see the first page of this Guide for steps).

Step 2. Scroll down and check the **Show link to submit form** under the Publishing subheading (see screenshot below) to activate the submission form for your collection. Uncheck the box to deactivate the submission form:



Step 3. Click the **Update ir_series** button to update your collection.

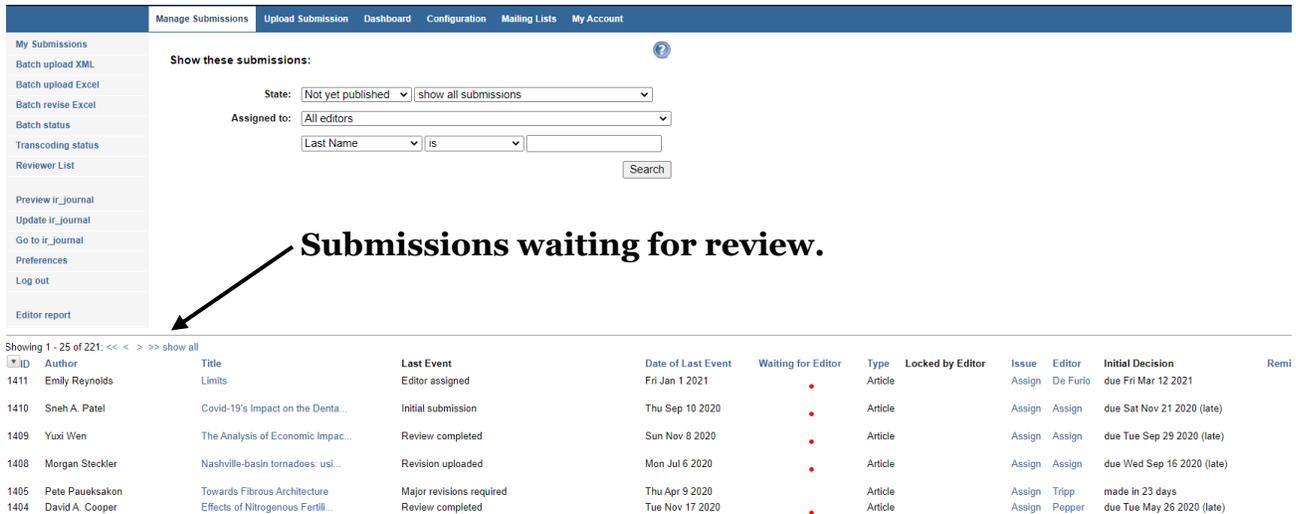
Step 4. Notify TRACE@utk.edu to run an overall **Site Update**. Your submission form will not be live until the TRACE Administrator runs this site update.

APPROVE AND POST SUBMISSIONS

Author submissions must be approved by a Collection Manager before they are published to a TRACE collection. Managers can view all pending submissions from the **Manage Submissions** link on the **My Account** page OR from the **Manage Submissions** tab from your collection's **Configuration** page.

Step 1. Log in to TRACE, navigate to your collection, and access your Manager tools via the **Configuration** screen (see the first page of this Guide for steps).

Step 2. Click **Manage Submissions** on the top navigation bar and scroll down to view all submissions waiting for review. Any submission not yet published will show by default. You can also filter by status using the dropdowns at the top of this screen (All submissions, Published submissions, Withdrawn submissions, etc):

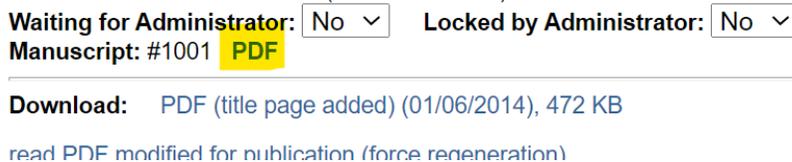


Submissions waiting for review.

ID	Author	Title	Last Event	Date of Last Event	Waiting for Editor	Type	Locked by Editor	Issue	Editor	Initial Decision	Remi
1411	Emily Reynolds	Limits	Editor assigned	Fri Jan 1 2021	•	Article		Assign	De Furio	due Fri Mar 12 2021	
1410	Sneh A. Patel	Covid-19's Impact on the Denta...	Initial submission	Thu Sep 10 2020	•	Article		Assign	Assign	due Sat Nov 21 2020 (late)	
1409	Yuxi Wen	The Analysis of Economic Impac...	Review completed	Sun Nov 8 2020	•	Article		Assign	Assign	due Tue Sep 29 2020 (late)	
1408	Morgan Steckler	Nashville-basin tornadoes: usi...	Revision uploaded	Mon Jul 6 2020	•	Article		Assign	Assign	due Wed Sep 16 2020 (late)	
1405	Pete Paueksakon	Towards Fibrous Architecture	Major revisions required	Thu Apr 9 2020	•	Article		Assign	Tripp	made in 23 days	
1404	David A. Cooper	Effects of Nitrogenous Fertil...	Review completed	Tue Nov 17 2020	•	Article		Assign	Pepper	due Tue May 26 2020 (late)	

Step 3. Click a submission **Title** to view the **Submission Details** page. This page shows additional information and actions you can take.

Step 4. Use the **Post** option in the Submission Details sidebar when you are ready to post a submission publicly. Prior to posting you may wish to [revise the submission](#) and/or review the submission by clicking **PDF**:



Waiting for Administrator: No Locked by Administrator: No

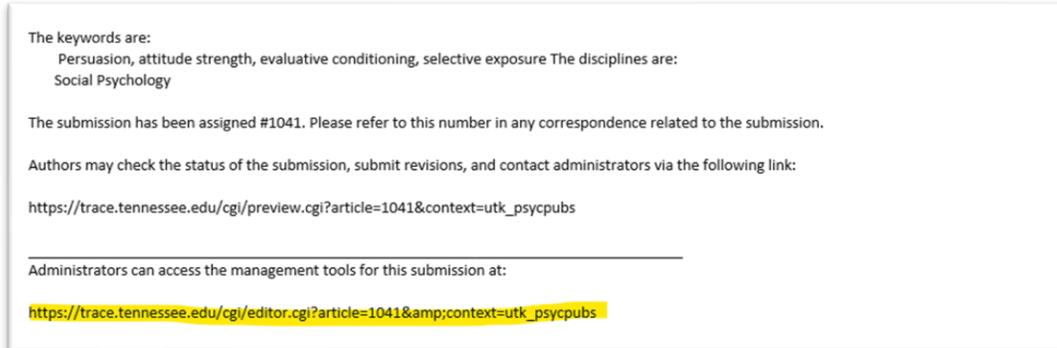
Manuscript: #1001

Download: PDF (title page added) (01/06/2014), 472 KB

[read PDF modified for publication \(force regeneration\)](#)

Step 5. Click the **Update ir_series** button to update your collection.

NOTE: If your permissions have been set up to receive email alerts, you will automatically receive an email when a submission is ready for viewing. Click the link in the bottom of this email to be taken directly to the submission page within the Configuration screen (see screenshot below):



Once in the Configuration Screen, follow the steps above for reviewing submissions directly in TRACE. If you are not receiving new submission emails, connect with your department administrator or email trace@utk.edu to have this permission added.

CREATE A SUBMISSION ON BEHALF OF OTHERS

Collection Managers can create submissions and submit material on behalf of others.

Step 1. Log in to TRACE, navigate to your collection, and access your Manager tools via the **Configuration** screen (see the first page of this Guide for steps).

Step 2. Click the **Upload Submission** tab from your collection's Configuration page.

Step 3. Complete the **Submission form**. You can provide as much info as you like (the more, the better), but the fields below are required:

REQUIRED FIELD 1. Title. Use capitalization appropriate to your field; when in doubt, follow Title Case (i.e., capitalize the first word of the title; the first word of a subtitle; the first word after a colon, dash, or end punctuation; all major words; and words of four letters or more).

REQUIRED FIELD 2. Author Names. Authors can be either individual names or corporations/institutions.

REQUIRED Authors

1	(author@school.edu) Jane Author , University of West Marin	 
2	(author@institution.edu) Gary Author , University of Marin	 
3	Department of International Relations and Cooperation	 



For **individual names**:

- Begin typing the first name, last name, email address or institution of the author. If the author was previously entered into the system, an entry for the author will appear in the drop-down. Click the correct entry to add the author's name to the submission.
- If an entry for the author does not appear in the drop-down, you can add the author manually completing the available fields.
- Click the "+" icon and repeat this process to add co-authors.
- To edit an author, click the pencil icon to the right of the name.
- To remove an author, click the "x" icon to the right of the name.
- To reorder authors, change the number in the box above the author name.

For **corporate or institutional authors**:

- Begin typing the name of the corporation or institution. If the information was previously entered into the system, it will appear in the drop-down. Click the correct entry to added the name to the submission.
- If an entry for the corporation or institution does not appear in the drop-down, you can add it manually by checking the **Corporate** box next to the **Institution** field and filling in the corporation or institution's name.
- Click the "+" icon and repeat this process to add corporate or institutional authors.
- See individual author instructions above for how to edit, remove, or reorder institutional authors.

REQUIRED FIELD 3. File Upload. To complete your submission, Use the **Browse** button to locate and upload the file(s). The most common file formats in TRACE are PDFs, Powerpoints, and Videos:

- **PDFs.** PDFs are the preferred and most standard file format. If you provide a Word or RTF file, the system will convert it to PDF. **With a PDF, you will receive metrics on the document, and PDFs are the only file type that will activate the blue "Download" button on an entry** (see screenshot below):



- **Powerpoints.** Upload a PowerPoint in one of two ways: 1) save the slides as a PDF and upload the PDF as your primary file. THEN 2) check the **Additional Files** box toward the bottom of the form and upload your PPT file on the screen that appears after you click **Submit**.

Additional Files

Please check this if you'd like to add additional files

Cancel Submit

This may take a while. Please only click once.

- **Videos.** Video files may also be uploaded to TRACE. If your priority is to preserve a video, either 1) upload it as a primary file, or 2) as a supplementary file if you have an accompanying PDF transcript or caption file. **Note:** The expectation is that all materials stored in TRACE will be closed-captioned/accessible. YouTube and Canvas Studio provide auto-caption options. For help with closed captioning your video, contact the OIT HelpDesk.
- **Links to Remote Sites.** To point to a web resource, select this option and paste the URL in the text box that appears. When you link to a remote site, a “Link to Full Text” button will appear on the article page instead of a “Download” button.
- **Importing a publicly accessible file.** If the file is publicly accessible, select this option, and paste the URL of the file in the text box that appears.

Step 4. After completing the submission form, click the **Submit** button. This will take you to a confirmation screen that summarizes your metadata and lists additional options:

- **Revise Submission:** Returns to the submission form so you can make changes.
- **Make Another Submission:** Begins a new submission.
- **Manage All Submissions:** View and manage all submissions uploaded to the series (choose this if you are not yet ready to publish item(s) live).
- **Publish & Update Selected:** If no revisions are necessary, you can publish the item to the repository and make it visible to the public immediately. The “Publish & Update Selected” method combines the post and update steps into one.

Publishing Queue

<input type="checkbox"/>	ID	Article	Author(s)	Add Date	Submitter
<input checked="" type="checkbox"/>	1027	Sample Title	Jane Author, author@school.edu Gary Author, author@institution.edu Department of International Relations and Cooperation	08/14/2014	Sally Author, sally_author@marin.edu



Clicking the “Publish & Update selected” button will make the checked submissions above available online

Step 5. When you select the **Publish and Update Selected** option in Step 4, all items with marked checkboxes will be posted, and a series update will automatically be queued. You will receive an email when the update is complete. To see the changes, you may need to **refresh your screen.**

REVISE AN EXISTING SUBMISSION

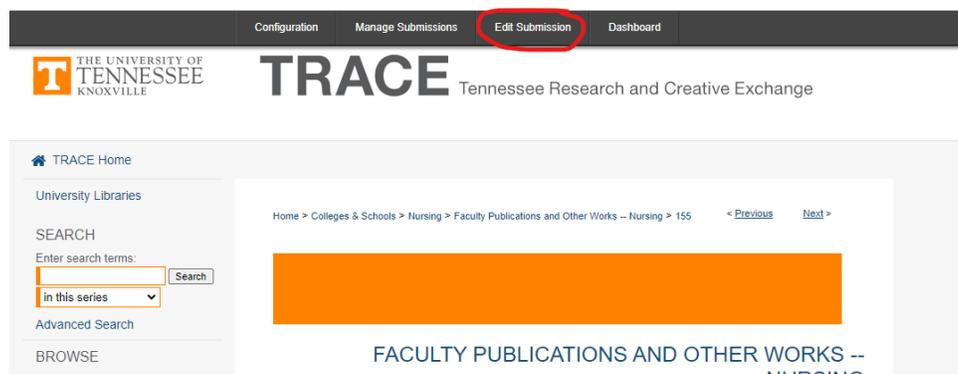
Community managers occasionally revise existing submissions, either to add information to the entry and/or upload a revised version* of the submission.

Note: When uploading a revised version, first consider how many downloads have occurred. Uploading a new version may alter the scholarly record and invalidate existing citations. There are two ways to approach uploading revisions (see the “View Revisions” section of [this Digital Commons help page](#) for more). If you have questions about whether or not to upload a revision, reach out to trace@utk.edu for guidance.

Step 1. Log in to TRACE, navigate to your collection, and access your Manager tools via the **Configuration** screen (see the first page of this Guide for steps).

Step 2. Go to the page of the submission you wish to revise.

Step 3. Select the **Edit Submission** option on the gray bar at the top of the screen (see image below). This will take you to the Submission Details page.



Step 4. From the **Submission Details** page, click **Revise Submission** on the left-hand sidebar (see image, left). This will bring you to the editing form.

Step 5. Edit the elements on the form, and enter a summary of changes made in the **Reason for Update** field at the bottom. Click **Submit**.

Step 6. Update the collection. If the document is already posted to the site, click the **Update in series** button on the sidebar to ensure that changes display publicly.

TIP: You can also view a record of previous revisions to a submission by clicking the **View Revisions** button on the sidebar.

REMOVE/WITHDRAW A SUBMISSION

Follow these steps to remove a posted submission and/or to withdraw an unposted submission (that needs additional work, was submitted to the wrong collection, etc.).

Step 1. Log in to TRACE, navigate to your collection, and access your Manager tools via the **Configuration** screen (see the first page of this Guide for steps).

Step 2. For submissions that have already been posted to your collection, from the Submissions Detail page, click **Remove Submission** on the sidebar.

- Choose the **Do not notify authors** button to remove the submission without sending the suggested email. Choose **Notify authors** to send the suggested email to the email address(es) provided with the submission.
- Click **Remove Submission** to complete the removal/withdrawal process.

Step 3. If you are withdrawing a submission that has been posted, click the **Update** link. If the submission had not yet been posted, there is no need to update the site.

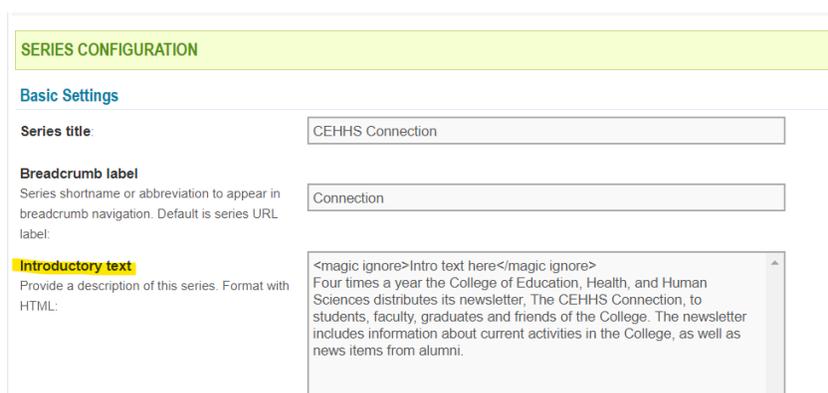
NOTE: Once the series has been updated, the submission's metadata will remain present at its current URL, but the link to download the file will be replaced with a notice to visitors that this document has been withdrawn. Items yet to be posted will move from the **Not yet posted** state to the **Withdrawn** state.

EDIT COLLECTION PAGE INTRO CONTENTS

Adding introductory text to the top of your collection landing page is optional (only about 20% of TRACE collections have introductory text). If you decide to include Introductory text, you can edit this text under the Configurations menu.

Step 1. Log in to TRACE, navigate to your collection, and access your Manager tools via the **Configuration** screen (see the first page of this Guide for steps).

Step 2. Edit introductory text. The introductory text is configured under the field highlighted in the screenshot below:



The screenshot shows a web interface for 'SERIES CONFIGURATION'. Under the 'Basic Settings' section, there are three input fields: 'Series title' (containing 'CEHHS Connection'), 'Breadcrumb label' (containing 'Connection'), and 'Introductory text' (highlighted in yellow). The 'Introductory text' field contains HTML-formatted text: '<magic ignore>Intro text here</magic ignore> Four times a year the College of Education, Health, and Human Sciences distributes its newsletter, The CEHHS Connection, to students, faculty, graduates and friends of the College. The newsletter includes information about current activities in the College, as well as news items from alumni.'

HTML formatting should be used in all fields on the Configuration menu. HTML formatting allows you to create bold, italic, and underlined text, as well as include links in the body of your introductory text. If you are unfamiliar with HTML, see the **HTML and Coding Tips** document located at www.lib.utk.edu/tracesupport for help.

The **Introductory Text** field is likely the only one you need to edit, below are other common fields you may wish to utilize:

- **Extra sidebar link URL:** Use this field to add a link to your department or program homepage. This link will appear on the left-hand navigation list on your collection homepage.
- **Extra sidebar link display label:** This is the text that displays for the extra sidebar link URL.

Step 3. Once you have made your changes, click **Submit Changes** at the bottom or top of the Configuration screen. Your submitted updates will be confirmed and detailed at the top of the screen.

Step 4. Click **Update ir_series** on the left-hand navigation bar to push the updates through. You'll receive an email once the site has updated (you may need to refresh your screen for your updates to appear).

TROUBLESHOOTING / FAQ

I don't see the gray bar with the Configuration button at the top of my screen.

1. Doublecheck that you are logging in to TRACE with the same email under which you were given Collection Manager privileges.
2. Make sure you are on the correct collection page.
3. Refresh your screen.
4. If you still do not see the gray bar Configuration bar, email trace@utk.edu with the URL of your collection and your TRACE login email. The TRACE administrator will doublecheck your permissions and provide further assistance.

Why can't I see my collection updates?

There are a few reasons you might not see changes made to your collections:

1. You have not performed a site update. Any changes require TWO updates – You must “**Submit Changes**” and then “**Update ir_series**” on the left-hand menu of the Configuration screen.
2. The site is still updating. Updates can take several minutes.
3. The update is complete, but you have not refreshed your screen. Refresh your screen to view your changes.

I'm looking for guidance on more advanced functions. Are other resources available?

The [Community Manager FAQ](#) on the TRACE Support page contains additional information. For assistance with additional functions, feel free to email trace@utk.edu.

I don't get it! Who can I contact for help?

You have two key contacts for technical assistance with TRACE:

1. **TRACE Administrator (in UT Libraries)** TRACE@utk.edu The TRACE Administrator can add/edit managers, assign permissions, and help with basic navigation and troubleshooting.
2. **TRACE/Digital Commons Consultant** dc-support@cs.bepress.com can provide scheduled TRACE orientations/training, offer technical assistance, help with more advanced tasks, and perform more complex functions within TRACE.