



# **User Manual**





## Table of contents

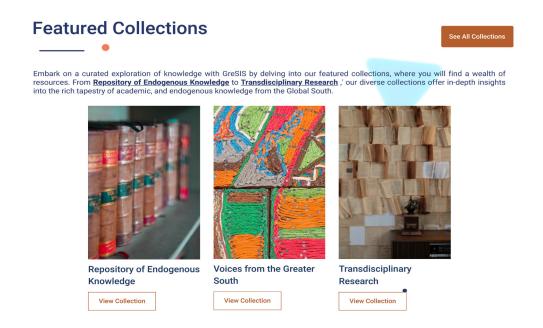
Accessing Resources	1
Creating a Collection	5
Resource Upload	7
Publishing Requests	16
	Creating a CollectionResource Upload

## Accessing Resources

#### **Curated Resources**

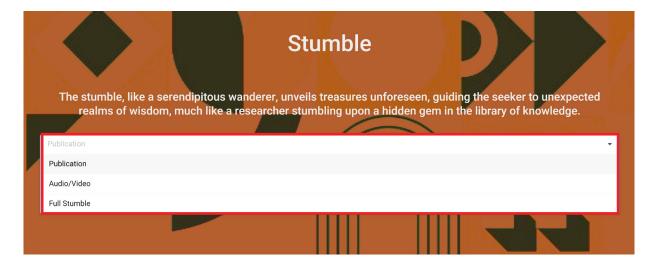
On the bottom of the homepage you will find the **Featured Collections** menu, which allows you to choose a resource from one of Gresis' three curated collections:

- 1. Repository of Endogenous Knowledge
- 2. Voices from the Greater South
- 3. Transdisciplinary Research.



## **Stumble Function**

Also located at the bottom of the homepage is the **Stumble** function. This feature randomly selects a resource for you as though you stumbled upon it by chance in a library. Choose between either **Publications** or **Audio/Video**, or both with the **Full Stumble**.



## Search

At the top of every page you will find the **search bar**, which you can use to find specific resources you are looking for using keywords such as titles, authors, or subjects.

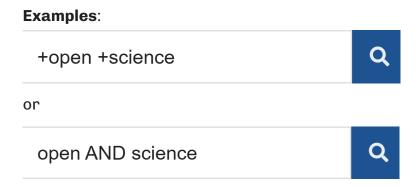


### **Simple Search**

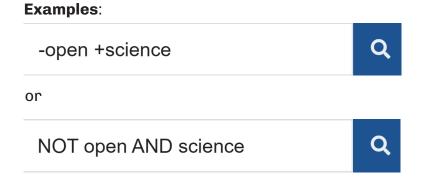


Results will match records with the **terms open or science** in **any field**. Note that stemming is applied so e.g. **science** will also match **sciences**. Search results are ranked according to an algorithm that takes your query terms into account.

You can require **presence** of both terms using either the + or **AND** operator:



You can also require the **absence** of one or more terms using either the - or **NOT** operator:

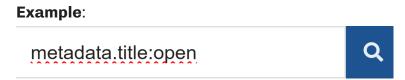


#### **Phrase Search**

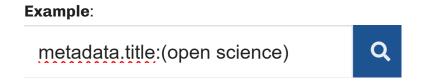


Results will match records with the **exact phrase open science** in **any field**.

#### **Field Search**

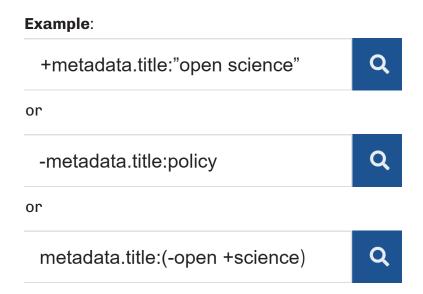


Results will match records with the **term open** in the **field metadata.title**. If you want to search for multiple terms in the title you must **group the terms** using **parenthesis**:



### Combined simple, phrase or field search

You can combine **simple**, **phrase** and **field** search to construct advanced search queries.

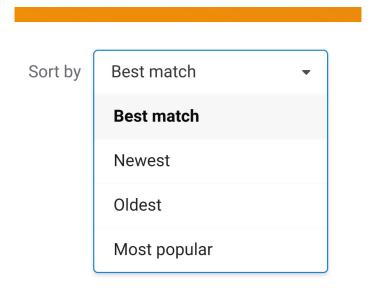


For a full detailed list of advanced search queries view the **search guide** found underneath the filter menu on the left side of the screen.

## **Ranking / Sorting**

By default all searches are sorted according to an internal ranking algorithm that scores each match against your query. It's possible to also sort the results by:

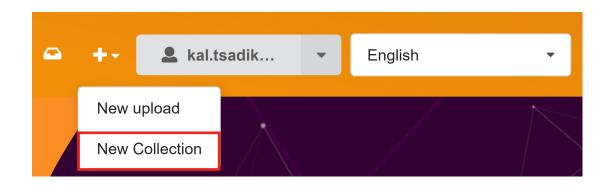
- Best match
- Most popular
- Most recent
- Oldest



## Creating a Collection

To create a new collection, navigate to the **collections** page, which can be accessed in two ways:

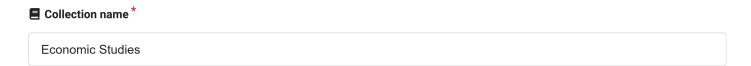
a. From any page, use the drop-down menu at the top near your user ID to find the **New Collection** option.



b. From the **My Dashboard** page, go to the **My Collections** tab and select the **New Collection** button at the top right.



1. Collection Name: Assign a name to your collection.



2. Identifier: Provide a unique identifier for your collection.



This is your collections's unique identifier. You will be able to access your collection through the URL:

https://gresis.osc.int//communities/economicstudies

3. Collection Visibility: Decide whether your collection is public or restricted to certain users.

## **Collection visibility**



Your collection is publicly accessible and shows up in search results.

Restricted

Your collection is restricted to users with access.

**4. Create Collection:** After entering the required information, click on the **Create Collection** button.

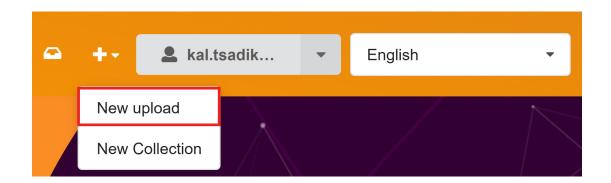


## Resource Upload

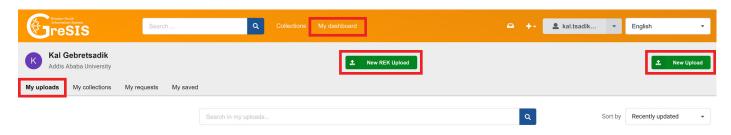
## **Mandatory Fields**

To upload a resource, proceed to the **new upload page**, accessible in two ways:

a. Select the drop-down menu at the top of any page next to your user ID to see the **New upload** option.

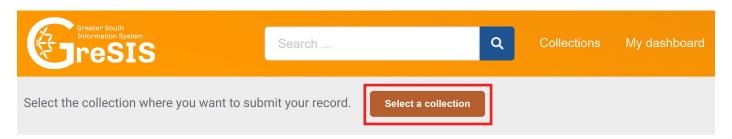


b. From the **My Dashboard** page select the **My uploads** tab and then choose either the **New Upload** button at the top right or the **New REK Upload** button in the middle.

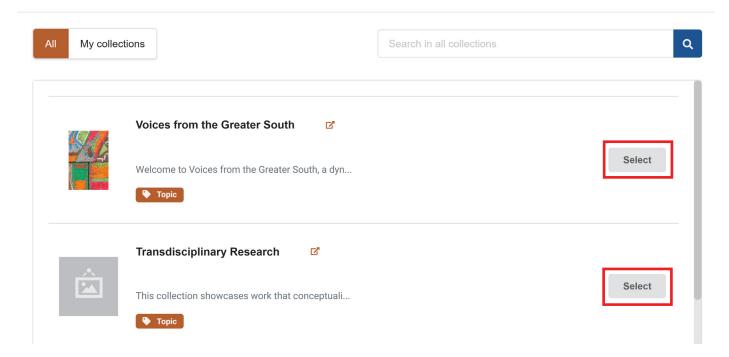


**Note**: The **New REK Upload** button defaults to uploading to the **Repository of Endogenous Knowledge** collection, whereas the regular upload button waits for you to choose the collection during the upload process.

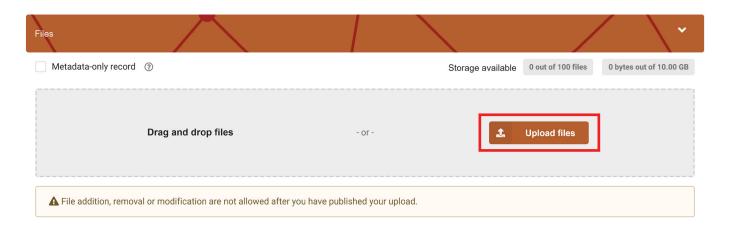
1. Select Community: Choose the community where your resource will be published.



#### Select a collection



2. Files: Drag and drop files or upload them using the Upload files button.



#### 3. Gresis Basics Section:

**a. Endogenous Knowledge:** Select **Yes** if your resource constitutes Endogenous Knowledge.



Refers to knowledge systems embedded in the cultural traditions of regional, indigenous, or local communities. ...

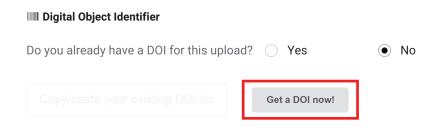
b. Global South Knowledge: Select Yes if your resource is from countries in the Global South. **(#)** Is Global South Knowledge 

Yes 

Other Refers to knowledge that is from Global South countries ... **c.** Country: Type and then select the country related to your work. Country Brazil X Choose the country your work is related with ... **d. Language:** Type and then select the language of the resource. Languages English X 4. Basic Information Section: a. Digital Object Identifier DOI: i. If you already have a DOI for the resource, select Yes and enter the DOI in the space provided. IIIII Digital Object Identifier Do you already have a DOI for this upload? 

Yes O No 10.1007/s10393-009-0210-8 A DOI allows your upload to be easily and unambiguously cited. Example: 10.1234/foo.bar

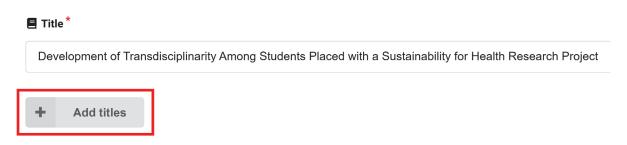
ii. If you don't have a DOI. First select NO and then select Get a DOI now! to get a new DOI.



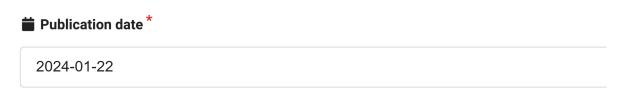
**b. Resource Type:** Choose the type of resource you are uploading.



**c. Title:** Write the title of the resource and add additional titles if necessary with the **Add titles** button.

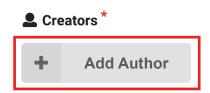


**d. Publication Date:** Input the date of publication if it was already published elswhere.



In case your upload was already published elsewhere, please use the date of the first publication.

- e. Creators: Add author details.
  - i. Click on the Add Author button.



ii. Select the type of author and then enter the name of the person or organization that authored the resource.

#### **Add Author**



iii. Include additional information such as Affiliations, and Role.



iv. If there are multiple authors, click on the **Save and add another** button, or if there is only one author, click on the **Save** button.



e. Description: Provide a description for your resource. You can edit and format it within the text box and add multiple descriptions by clicking on the Add description button.



**f. Licenses:** By default, all resources are assigned the Creative Commons Attribution license. If your resource has a different license, you can add it here.



## **Optional Fields**

#### **5. Recommended Information Section:**

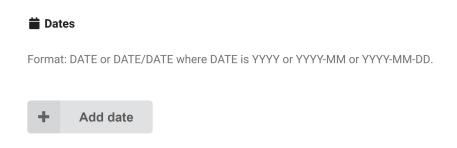
a. Contributors: Add any contributors to the resource other than the authors.



**b. Subjects:** Include relevant subjects covered in the resource.



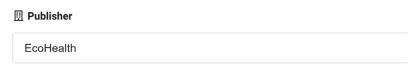
c. Dates: State additional relevant dates.



d. Version: Specify the version number.

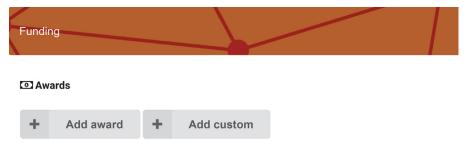


e. Publisher: Enter the publisher's information.

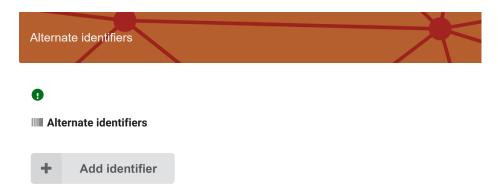


The publisher is used to formulate the citation, so consider the prominence of the role.

**6. Funding:** Include any awards or funding received for the resource. You can search for existing awards or add a custom award.



7. Alternate Identifiers: Add multiple alternate identifiers by using the Add identifiers button.



8. Related Works: Link related works, detailing the relationship, identifiers, and scheme.

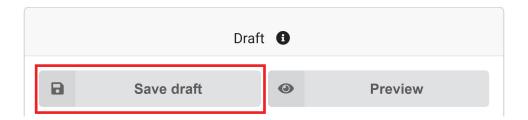


9. References: Include reference strings used in your resource.

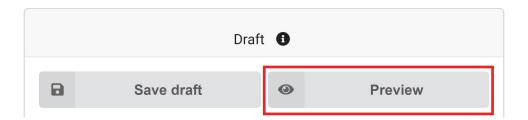


#### 10. Publishing:

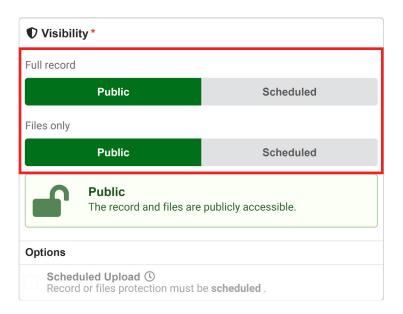
a. Save Draft: Save the draft if you wish to continue the upload process later.



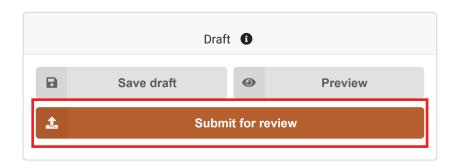
**b. Preview:** Preview the resource before uploading.

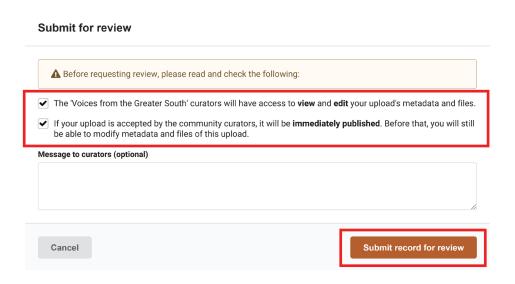


**c.** Visibility: Choose whether to make the resource public immediately or schedule the upload for a later date.



**d. Submit for Review:** After reviewing and verifying the information, check the required fields and submit the resource for review.

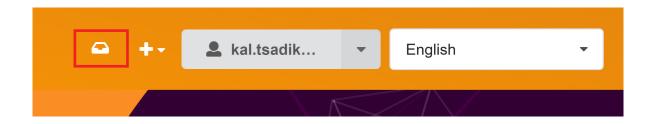




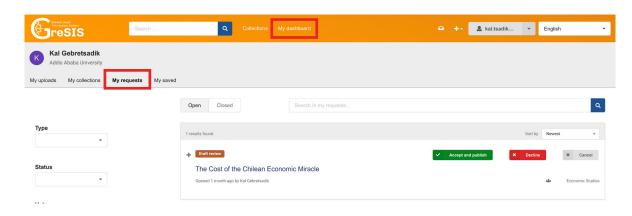
# Publishing Requests

To publish a request made to your collection, visit the requests page, accessible in two ways:

a. Click on the request icon at the top of any page next to your user ID.



b. Or from the My Dashboard page, go to the My Requests tab.



1. Conversations: First click on the resource title



then use the conversations tab to send comments to the uploader regarding necessary changes.



2. Viewing Resources: Open the resource to view its contents in the Record tab.



**3. Publishing:** After reviewing the contents, choose **Accept and Publish** to publish the resource in your collection, or select **Decline** to prevent its publication.

