ESPLORO ESSENTIALS: *Research Assets*

Managing Research Deposits and Assets

After a research deposit has been added by a repository manager or submitted by a researcher, it can be edited, managed, and approved in Esploro. A research deposit will not be discoverable in the Esploro Research Portal or in Researcher Profiles until it has been approved by a repository manager.

From the Repository menu, choose Manage Asset Deposits. This shows you all the research deposits that have not yet been approved.

Click on a title to open the research asset form, where you can make changes to the metadata.

These tabs here allow you to include information that is important for administration purposes, but is not meant to be available for discovery. For example, an attachment could be a PDF of the researcher acceptance policy that the researcher signed. If you want to make an internal note, such as "Must check on access rights," you can do that here.

When a researcher submits a deposit, you have a few options.

If you have checked the asset and determined that it is complete, then click Approve. Affiliated researchers included in this asset will be notified by email, if they have opted-in. You can add a note to the email here, and then click Done to confirm the approval. An email will be sent to affiliated researchers associated with this asset. By default, the asset will be discoverable in the Esploro Research Portal and in Researcher Profiles, according to its access rights. We will see in a moment how to change the visibility. Be aware that once an asset has been approved, you cannot make it revert to deposit status.

To ask the researcher a question, use the Contact Researcher button.

If the deposit requires additional input from the researcher, you can send it back to the researcher with the Return button. This allows the researcher to edit the deposit. You must choose a Return reason, for example "Incomplete Submission" or "Copyrighted Material," and you may add a note. The Return reason options can be changed in the Configuration menu.

Messages sent with the Contact Researcher and Return buttons will appear as a notification on the researcher's research profile. The researcher may also receive an email, if they chose to opt-in. All messages will be recorded on the communications

tab of that asset. The History tab records when a deposit was submitted, returned, resubmitted, etc.

Another way to get to the list of research deposits is to select Deposits in the search bar and click the search icon.

Researcher submitted deposits will appear on the Unassigned tab until they have been assigned to or handled by a repository manager, at which point they get the status of Under Review. If you start making changes to one, it will move to the Assigned to Me tab. You can also choose to assign a research deposit to another staff member. Either way, only the assigned staff member is able to edit the deposit that is Under Review. To change this, release the assignment, and it will revert to Unassigned.

Here, you can see the Input Status of the deposit. "Submitted" indicates that it was submitted by a researcher. If it was added by a repository manager, then it is called a "Draft ".

Other possible statuses are Returned, Re-Submitted, Under Review, and Approved. Once an asset is approved, it will no longer appear on the list of research deposits.

Notice that each deposit has a drawer, which you can expand to show more information without opening the research asset form.

You can Return or Delete the research deposit directly from this page. You can also edit the asset in generic form. This opens a research asset form that contains all the possible fields from all the research asset types. This can be useful if a specific form does not have all the fields that you need, including metadata that came from smart harvesting. You can also choose to change asset types. If you do, no metadata will be lost, but only the fields relevant to the new asset type will be displayed on the form.

That's how you manage research deposits. Managing approved assets is similar. Use the search bar to find the research asset you are looking for. On the left are several facets to help you narrow your search.

Approved assets by default are displayed in the research portal and in the researcher profiles. To prevent display of an asset in one or both places, select edit, and then use the visibility checkboxes. Here, you can separately approve Display in portal and Display in profiles. If you uncheck the boxes and Save, these icons show that the asset is not visible in the portal and it is not visible in the researcher profiles.

After approval, an asset can be changed or even deleted, but it cannot be returned to the researcher.

With Esploro you have full control over the metadata and files of your research assets, and you control their display in the research portal and on the researcher profiles.