ESPLORO ESSENTIALS: *Research Assets*

Customizing the Research Asset Form

Many parts of Esploro are customizable through the configuration menu.

In this video, we will demonstrate how to configure the research asset form, so that it meets the needs of your institution. Specifically, we will show an example of how to control which options appear for which asset types. We will also show how to add a local field, with a label of your choice. These customizations enable you to precisely record the metadata that you are interested in.

You will use the Research Asset form when you deposit a new Research Asset or when you edit one that already exists in Esploro.

Many of the fields of the research asset form are filled in by selecting one item from a pre-defined list. The list of items that appears may depend on the category or type of asset that you are editing. With configuration, you control which options appear for which asset types. Let's look at an example.

When depositing a research asset, you will likely want to include the content of the research output itself. In the case of a journal article, for example, this would be the text of the article. You can include the content either by uploading a file or by adding a link. To give context to the person viewing the content, you can specify the type of file or link, for example, that this is a preprint, or that this is the published version. You can modify these options or add new ones in Configuration.

To configure Esploro, you must have the Configuration Manager role. If you don't have configuration permissions, someone else on your team does.

Open the configuration menu by clicking on the gear icon in the lower-left corner. The configuration options are divided into sections. For this example, open Repository, and under Asset Details, click File and Link Types.

Here you see a table where each row represents a type that you can use to label a file or a link. The Name is what appears to a person viewing the research asset. The Applicability is whether it can be used only for files, only for links, or if it can be used for both. For example, Event Website will only appear as an option for a link, not for a file. Asset Categories determine when this option will appear. For example, a Correction file type will be an option for assets in the categories of Publication, Posted Content, and Patent, whereas a README file type will only be an option for Software or for a Dataset. At any time, you can switch a content type from active to inactive, in which case it will not appear as an option in the link and file type field of the research asset form.

To modify a file or link type, click the row actions button and then edit. Here you can change the Name, Applicability, and the Asset Categories in which it will appear. To add a new type, click here and fill in the same information, along with an identifying Code.

Now you can see that the new type has been added as a row in the configuration table.

And, if we look at the research asset form, it has been added as an option in the drop-down menu. So that is how you configure File and Link Types.

This is just one example. Many other fields of the research asset form are organized into configuration tables like the one we saw and are configured in a similar way. For more explanation on exactly how to make these configuration changes, see the Esploro Online Help.

Another important way to customize your research asset form is with local fields.

The names of these fields can be customized, so that you can add information about assets that aren't available in any other section and that are important to your institution. For example, you could create customized tags or statuses for research assets, or provide a place for repository managers to store extra information about the assets, and so on.

To customize these local field names, go to the Configuration menu. Open Repository. Under Asset Details, click Local Field Names. To change a field name, select the row-action button, click Edit, and type in a new name. Then activate the field.

Back on that asset page, the activated local fields are now available for all types of Research Assets. These are not required fields. You can search those local fields from the persistent search box. You can also use local fields for analytics reports.

For demonstrations of other configuration options, see the How-To videos in the knowledge center.