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PHAIDRA User Guide

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Author

Victoria Eisenheld

Team Research Data Management, Research and Publication Services, University Library, University of Vienna

Editorial and Technical Support, and English Translation

Asmus Böhm

Team Research Data Management, Research and Publication Services, University Library, University of Vienna

Expert Review and Feedback

IT-Support for Research, Vienna University Computer Center, University of Vienna

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PHAIDRA Support: support.phaidra@univie.ac.at

Research Data Management Support: rdm@univie.ac.at

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About This Guide

This user guide provides a comprehensive introduction to using PHAIDRA, the University of Vienna's institutional repository for research data and digital collections.

It is intended for members of the University of Vienna and anyone else who wishes to use PHAIDRA to store, describe, organise, and make digital objects available.

It covers the key PHAIDRA functions, such as searching, uploading, creating metadata, managing access permissions, creating collections and object lists, and using other tools for managing digital content. The guide is designed to serve as both a step-by-step tutorial for new users and a reference work for more experienced users.

The chapters can be used independently of one another. Depending on your specific needs, therefore, it is not necessary to read the entire guide from start to finish.

The latest information and answers to frequently asked questions can be found on the University of Vienna's central RDM website.

This guide refers to the University of Vienna's PHAIDRA instance. However, individual functions or user interfaces may differ in other PHAIDRA instances.

1. About PHAIDRA

1.1. What is PHAIDRA?

PHAIDRA (*Permanent Hosting, Archiving and Indexing of Digital Resources and Assets*) is the University of Vienna's institutional repository for research data and digital collections. It serves to securely store digital content, make it findable and archive it for the long term.

Key features of the repository

- long-term archiving of digital objects,
- persistent identifiers (Handle, optional DOI) to ensure long-term findability and citability,
- open and closed publication options for primary data,
- support for a wide range of file types and data models,
- metadata-based description using controlled vocabularies,
- support for open licensing.

PHAIDRA is based on the open-source software Fedora and is operated and developed jointly by the University Library and the Central IT Service at the University of Vienna.

1.2. What is PHAIDRA used for?

With PHAIDRA, members of the University of Vienna can organise, archive, reference, make citable, publish and share (publicly or with restricted access) digital objects.

Typical use cases

- Publication and archiving of research output across all disciplines,
- Publication and archiving of digitised collections or cultural heritage objects,
- Sharing of teaching and learning materials,
- Archiving of media objects (photos, videos, audio) and websites (via the PHAIDRA Web Archive Service).

Important: PHAIDRA is not suitable for archiving **sensitive or confidential data**. Alternative services are available for this purpose. See the PHAIDRA FAQs and the central RDM website.

1.3. Which data can be stored in PHAIDRA – and which cannot?

Suitable for PHAIDRA

- data relevant to research, teaching or administration at the University of Vienna;
- data within the scope of university-related (research) projects;
- data intended to be made publicly available or accessible within specific groups;
- data for which long-term storage and availability is useful or necessary;
- digital or digitised objects that are to be citable (e.g. via Handle or DOI).

Not suitable for PHAIDRA

- sensitive personal data;
- confidential data (subject to contractual, ethical or legal restrictions);
- internal or security-sensitive documents;
- data that is still undergoing intensive processing (cleaning, updating, supplementing, expanding, etc.);
- data that is not intended for long-term archiving.

Note: in case of doubt, please contact the RDM Team (rdm@univie.ac.at).

1.4. Who can use PHAIDRA and under what conditions?

Target group

PHAIDRA is available to **all members of the University of Vienna**: staff, students and guests with an active u:account. Uploading, labelling and managing data **is free of charge**. There is **no storage limit** per user – members of the University can upload and store as much data as they need. An **active** u:account is required to upload data (see Chapter 2: Login and Home Page).

Ownership

Every digital object uploaded to PHAIDRA has an **owner**. The owner is responsible for keeping metadata accurate and up-to-date, for choosing the correct license, and for granting and maintaining access permissions.

Expiry of the u:account and transfer of ownership

If the individual u:account of an owner of objects in PHAIDRA expires (e.g. upon leaving the University of Vienna), the associated objects remain available in PHAIDRA. However, they can no longer be managed using the expired u:account – this applies to editing metadata and access permissions, as well as file versioning. If the objects are to be maintained or updated in future, there are two recommended procedures:

- Using a service email address for uploads (see Chapter 2 Login and Home Page → 2.1.) or
- **Transferring ownership** to another user with a valid u:account.

A request to transfer ownership must be submitted to PHAIDRA Support (support.phaidra@univie.ac.at).

Important: Please contact Support to arrange the transfer of ownership before leaving the university, whilst your u:account is still active, so that the transfer can be organised in good time.

Replacing/versioning files

Files stored in PHAIDRA **cannot** be **replaced or overwritten** by the owners **themselves**. To publish a new version of an object, users can upload a new file as a separate object and link it to the previous object (see Chapter 8 Editing objects retrospectively → 8.3.). In exceptional cases (e.g. if a file is corrupted), a request to replace the file can be made to PHAIDRA Support (support.phaidra@univie.ac.at).

Deleting files

Generally, objects uploaded to PHAIDRA **cannot** be **deleted**. The reason is that each object is assigned a persistent identifier, which must not lead to a broken link. In justified exceptional cases (e.g. legal issues, sensitive content), a deletion request can be submitted to PHAIDRA Support (support.phaidra@univie.ac.at).

Further information can be found in the PHAIDRA Policy and Terms of Use.

1.5. What does PHAIDRA offer compared to other University of Vienna systems?

The University of Vienna offers several special repositories and RDM services. PHAIDRA is the **institutional repository for research data and digital collections**. For information on other systems, see the PHAIDRA FAQs and the central RDM website.

PHAIDRA ensures that data is **archived** and remains **available for at least five years** from the date of upload. After this minimum period has expired, PHAIDRA endeavours to maintain accessibility and prevent data loss for as long as it is technically and organisationally feasible.

All data in PHAIDRA is stored on the **University of Vienna's own infrastructure in Austria**. This is operated by the University of Vienna's Central IT Service.

Further information can be found in PHAIDRA's Policy and Terms of Use.

1.6. Where can I get help with PHAIDRA?

If you have any questions about PHAIDRA that are not answered in this User Guide or in the PHAIDRA FAQs, or if you encounter any technical or organisational issues, the following **support and advisory services provided by the University of Vienna** are available to you:

Contact

For questions regarding **the use of PHAIDRA** (e.g. uploading and organising files, metadata, collections, access permissions, technical issues or error messages, etc.), please contact **PHAIDRA Support**: support.phaidra@univie.ac.at .

For legal, ethical or conceptual questions, as well as general questions regarding research data management (e.g. licenses, re-use, Open Science, Open Data), please contact **RDM Support**: rdm@univie.ac.at .

Training

Training sessions on PHAIDRA are offered to members of the University of Vienna. Training sessions are held regularly **each semester** in both German and English. Current dates and registration details can be found via u:rise and on the RDM website.

Individual introductions or consultations (online or on-site) can be arranged on request. Please direct enquiries to support.phaidra@univie.ac.at .

2. Login and Home Page

2.1. Registration and accounts

PHAIDRA is accessed via the web interface: https://phaidra.univie.ac.at. PHAIDRA is accessible **worldwide via the internet**. University network access (Wi-Fi, eduroam, VPN) is **not** required, except when accessing the PHAIDRA Sandbox (see Chapter 12 PHAIDRA Sandbox (Test Environment) → 12.1.).

You only need to log in to PHAIDRA if you wish to upload files, organise digital objects (e.g. create collections), adjust access permissions for objects or edit metadata. No login is required if you are simply searching for, viewing or downloading publicly accessible objects.

To log in to PHAIDRA, go to https://phaidra.univie.ac.at and click on the *'Login'* tab in the navigation bar (see Figure 1).

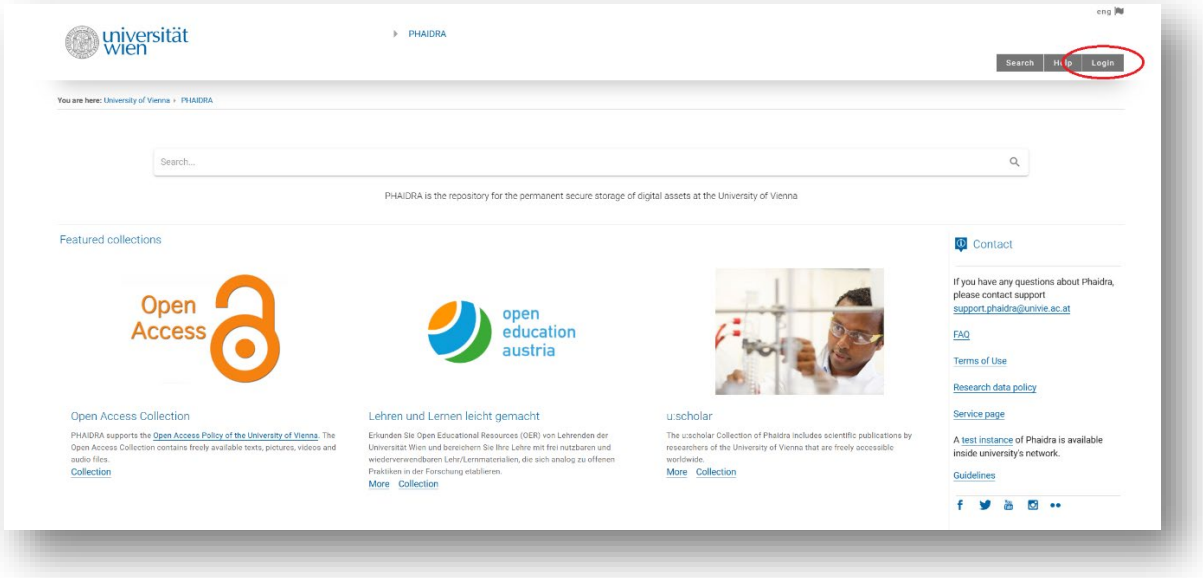

Figure 1: PHAIDRA homepage (before logging in). Marked in red: *'Login'* tab in the navigation bar.

Login types

PHAIDRA supports two types of access:

- Individual u:account
  For university staff, students and guests. This allows objects to be managed on a personal basis.
- Service email address
  Recommended for teams, working groups and projects. This allows several people to use the same

account, and all team members can upload new file versions, manage access permissions, edit metadata, maintain collections, etc. Objects can still be managed even if individual members leave the university and their u:accounts expire. Project data or digital collections thus remain managed and editable in the long term, and responsibilities can be shared within the team. Service email addresses are issued by the Central IT Service.

2.2. Logging out

To log out of PHAIDRA, click on the *Logout* tab in the navigation bar (see Figure 2):

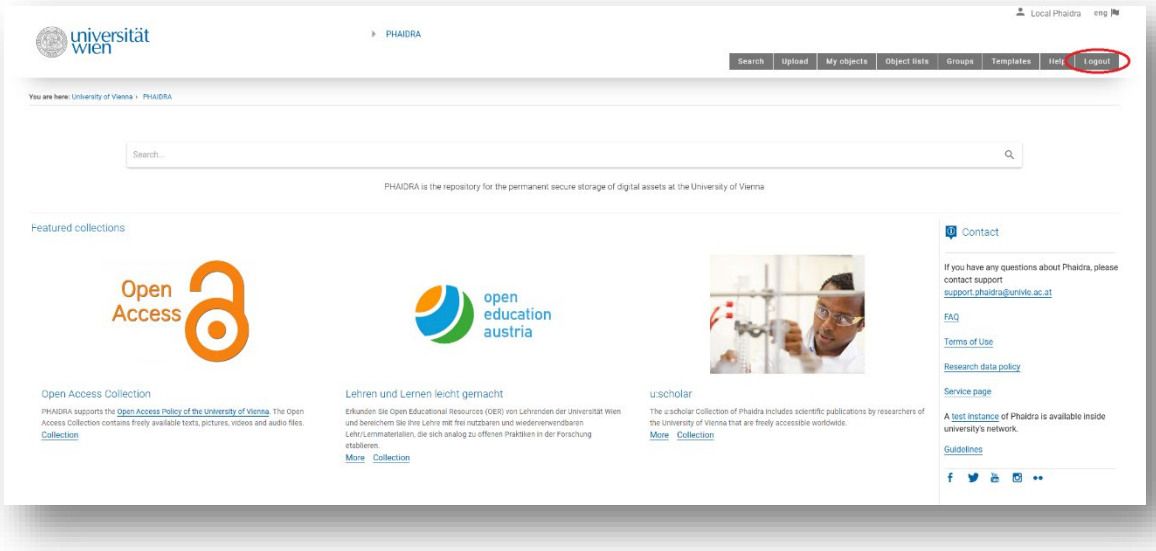

Figure 2: PHAIDRA homepage (after successful login). Highlighted in red: the *'Logout'* tab in the navigation bar.

Note: To ensure you are fully logged out, it is recommended that you also close the browser window afterwards, particularly when using shared or public computers.

2.3. Home page before logging in

The PHAIDRA homepage varies slightly depending on whether you are logged in or not. Without logging in, PHAIDRA primarily serves as a search system. The homepage then contains the following sections (see also Figure 3):

- Search bar (central)
  For direct search of digital objects and the use of various search filters.

- Navigation bar (above the search bar)
  Contains the tabs *Search*, *Help*, *Login*.

- Featured Collections (below the search bar)
  Presents selected collections (collections of digital objects). Users can open the collections directly, browse through them and view the objects they contain.

- Contact and Info section (right)
  Displays the contact details for PHAIDRA support as well as links to PHAIDRA's terms of use, the RDM policy, the RDM website, the PHAIDRA test instance and guidelines.

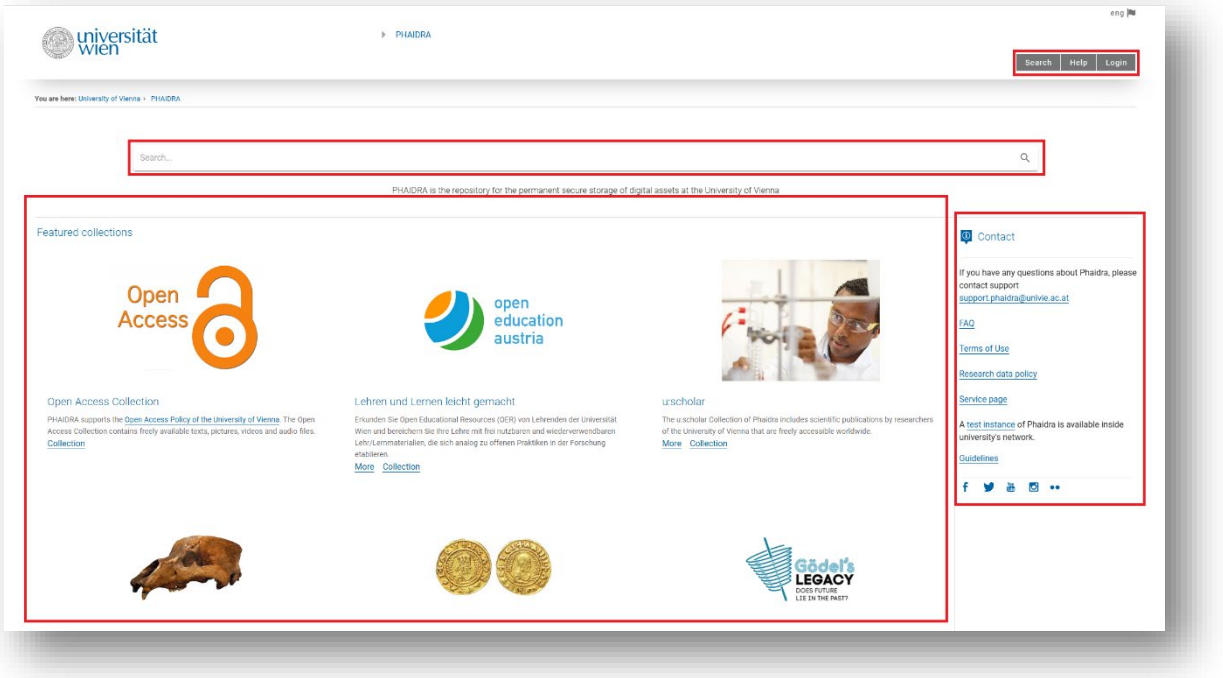

Figure 3: PHAIDRA homepage (for users who are not logged in). Marked in red: search bar, navigation bar, Featured collections, contact and info section.

2.4. Home page after successful login

After successfully logging in with an individual u:account or service email address, users have access to additional tabs in the navigation bar (see also Figure 4):

Upload
Create and upload a new object (for further information, see Chapter 6: Creating Objects)

My objects
Access to objects you have uploaded yourself (for further information, see Chapter 8: Editing objects retrospectively)

Object lists

Access to search lists you have created yourself (for further information, see Chapter 10: Object Lists)

Groups

Access to user groups you have created (for further information, see Chapter 11: Groups)

Templates

Access to self-created metadata templates (for further information, see Chapter 6 Creating objects → 6.3.)

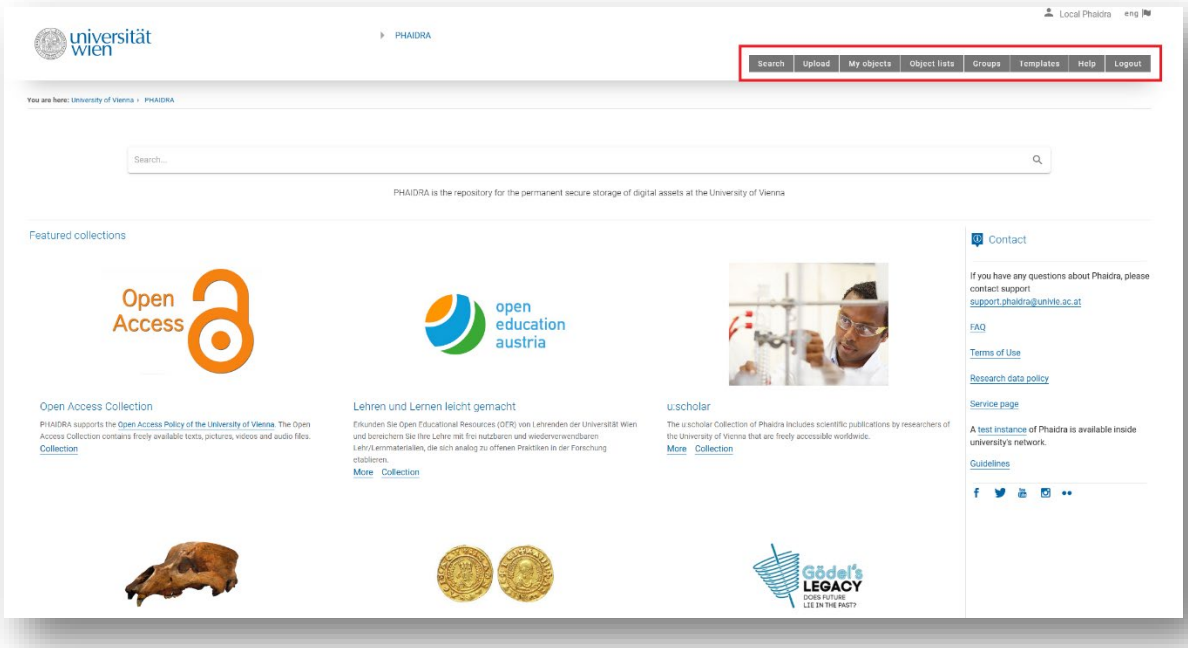

Figure 4: PHAIDRA home page (for logged-in users). Marked in red: navigation bar with all available tabs.

3. Object types in PHAIDRA

Various types of digital objects can be stored and published in PHAIDRA. The object type determines how files or content are structured, displayed and managed within the repository.

PHAIDRA distinguishes between five main object types:

- Single object – a file,
- Archive folder – a package of several files,
- Collection – a structured group of digital objects,
- Container – a context-bound unit comprising several digital objects,
- Resource – an external link as a digital object.

These types are described in detail below.

3.1. Single object

A single object consists of exactly one file, which is described with metadata and assigned a persistent identifier (handle and, optionally, a DOI). This can be a text, image, audio or video file, or any other file that is provided stand-alone.

When is a single object appropriate?

- The file is a self-contained work.
- No other files are inseparably linked to it.
- A single preview (via text, image, audio or video viewer) is sufficient.
- The object should be uniquely citable (one identifier per file).

Organising related digital objects

If several individual objects are thematically related, they can be organised into collections, e.g.:

- Presentation slides or video recordings of a conference,
- various results of a research project,

- several digitised items from a set,
- thematically related teaching materials.

Collections provide structure to individual objects without altering their identity (see Chapter 3 Object Types in PHAIDRA → 3.3.).

Instructions on creating individual digital objects can be found in Chapter 6 Creating Objects → 6.2. Information on file formats can be found in Chapter 6 Creating Objects → 6.1.2. and 6.2.1.1.

3.2. Archive folder

An archive folder contains several files in a single package. Typical formats: ZIP, TAR, TGZ, 7Z.

Typical use cases

- Research data folders (measurement data + scripts + documentation);
- Project directories with subfolders;
- Complex datasets that have to be used in combination;
- Files that are not intended to be displayed individually (e.g. raw data from a 3D model);
- Software packages, simulation results and technical data packages.

Properties of archive folders

- A single PHAIDRA object is created; the archive folder is uploaded in its entirety.
- The archive folder is assigned a persistent identifier; the files it contains are not.
- License and access rights apply to the entire archive folder.
- The internal folder structure is fully preserved.
- No previews of the contained files are available in PHAIDRA.
- Interested users must download the entire archive folder and unzip it locally.

Instructions on how to upload archive folders to PHAIDRA can be found in Chapter 6 Creating Objects → 6.2.

3.3. Collection

A collection is a structural object that groups together any PHAIDRA objects (known as members): individual objects, archive folders, containers and other collections. Collections do not contain files – they function as a container for digital objects that contain files.

Typical use cases

- Grouping outputs from a research project,
- Compilation of teaching and learning materials,
- Thematic digital sets,
- Presentation of heterogeneous materials within a shared context.

Characteristics of collections

- Do not contain files, only metadata and links.
- Can include any PHAIDRA objects.
- Have their own metadata and persistent identifiers.
- Display the contained objects in a member list.
- Objects remain completely independent (individual metadata, identifiers, access & license details).
- The owner of the collection does not have to be the owner of the contained objects.

You can find instructions on working with collections in Chapter 9: Collections.

3.4. Container

A container consists of several digital objects (known as members) which together form a contextual unit. The objects contained within are technically independent PHAIDRA objects, but are only displayed in PHAIDRA within the context of the container.

Typical use cases

- Multi-page documents, digitised as individual image objects;
- Multiple photographs of an object (front, back, details, etc.);

- Theses with supplementary material (PDF + images + datasets).

Properties of containers

- Contain metadata and links to digital objects.
- The objects contained in the containers have their own identifiers and metadata.
- The members of the containers are not displayed in the search results.
- Only the container is treated as a disseminated object.
- The container's metadata is overarching; the members should not be considered in isolation.
- Purpose: to present content as a single unit.

Containers cannot be uploaded via the user interface. They require special templates or technical workflows and assistance from PHAIDRA Support (support.phaidra@univie.ac.at).

3.5. Book

A book object is a complex digital object for displaying multi-page works. The contents of a book object are organised page by page and are displayed via a special book viewer that allows users to scroll through the pages.

Typical use cases

- Digitised historical books or manuscripts;
- Multi-page archival sources;
- Other extensive works from library or collection contexts.

Properties of book objects

- Are assigned to their own persistent identifier (PID); in addition, a separate PID is assigned to each individual page.
- The entire book is displayed as an object in the search results. Individual pages can be accessed directly via their PID.
- The display is provided by the Book Viewer, which offers functions such as page turning or the display of double pages.

- The detailed view also displays a link to the IIIF manifest. This describes the structure and order of the pages of a digital object and allows to display the content in IIIF-compatible external viewers or applications.

- If OCR data in ALTO format is also available, a full-text search within the book is possible. Matches are highlighted in the viewer. In this case, the book's contents can also be found via PHAIDRA's full-text search. However, due to the size of the data, searching may be technically limited.

Books cannot be uploaded via the user interface. They require special technical workflows and assistance from PHAIDRA Support (support.phaidra@univie.ac.at).

3.6. Resource

A resource object does not contain a file, but provides an external link. It allows external content to be treated as PHAIDRA objects, including metadata and persistent identifiers.

Typical use cases

- Provide a link to research data on external servers;

- Software repositories or documentation;

- Content that cannot be uploaded for legal reasons but should be citable.

Properties of resource objects

- Contain only URLs as digital content.

- Contain metadata and persistent identifiers (Handle, optional DOI).

- Suitable for content that is external, stable and available in the long term.

- Particularly suitable for content hosted on your own infrastructure (media servers, IIIF, institutional repositories).

Resource objects cannot be uploaded via the user interface. They require special technical workflows and assistance from PHAIDRA Support (support.phaidra@univie.ac.at).

3.7. Comparison: Collection – Container – Book – Resource

Feature	Collection	Container	Book	Resource
File contents	none (members have files)	none (members have files)	pages contain files; optionally, a complete PDF of the book	none
Contains	links to objects	links to objects	structured pages of a work	external link (URL)
Members visible in search results?	yes	no	no (only the book is visible)	–
Can members be used independently?	yes	limited / not intended	limited (pages accessible via PID)	–
Upload via user interface?	yes	no	no	no
Typical use	grouping	single work	multi-page works	integration of external content
Example	collection of project results Multi-year dataset of CO_2 fluxes, CH_4 fluxes and environmental parameters of the reed-covered wetland at Lake Neusiedl from mid-2018 to 2022. Pamela Alessandra Baur. CC BY-SA 4.0 International.	front and back of a coin Medicina in Nummis: Friedrich Heinrich Wilhelm Martini. University of Vienna, Institute of Numismatics and Monetary History. Public Domain Mark 1.0.	digitised historical book Catalogue of the 1st International Special Exhibition of Graphic Arts in Vienna. Vienna University Library. CC BY-NC 4.0 International.	external dataset Atmospheric model intercomparison dataset on Snowball Earth and waterbelt states. Johannes Hörner & Aiko Voigt. CC BY 4.0 International.

Table 1: Comparison: Collection – Container – Book – Resource

4. Search, Find and Object View

4.1. Search in PHAIDRA

Searching in PHAIDRA is central to the findability of digital objects. It can be used without logging in.

Full-text search (currently under development)

PHAIDRA has recently introduced a full-text search for PDF files. This feature is currently in the testing and development phase and is therefore only available with some limitations.

Currently, the following applies:

- Full-text search only covers the text content of PDF files.
- Only PDFs uploaded after December 2025 / January 2026 are included.
- For older items and other file formats (e.g. Word documents, images, audio or video files), full-text search is not available.

To activate the full-text search, select the *'Full-text Search'* button below the search bar. If this option is not activated, the search is performed using metadata only.

Metadata search

Regardless of the full-text search, searching in PHAIDRA is primarily based on indexed metadata fields. Therefore, a meaningful and careful metadata description remains crucial for the findability of digital objects. In other words, by carefully editing the metadata fields, you significantly increase the visibility and thus the value of your uploads.

PHAIDRA does not offer an advanced search form. Searches are carried out via a central search bar, where you can search for:

- single terms,
- multi-word phrases,
- logical operators (e.g. AND, OR, NOT),
- phrases in quotation marks,
- parts of titles, roles, classifications, etc.

The search bar is located centrally on the home page and under the *Search* tab.

4.2. Sorting and exporting search results

To the right of the search bar, you can set the sort order for the results (see also Figure 5):

- *A–Z*,
- *Z–A*,
- *1–9* (upload date ascending),
- *9–1* (upload date descending).

Two further functions are available:

- *Create a link to the search*,
- *Download search results in CSV file format*.

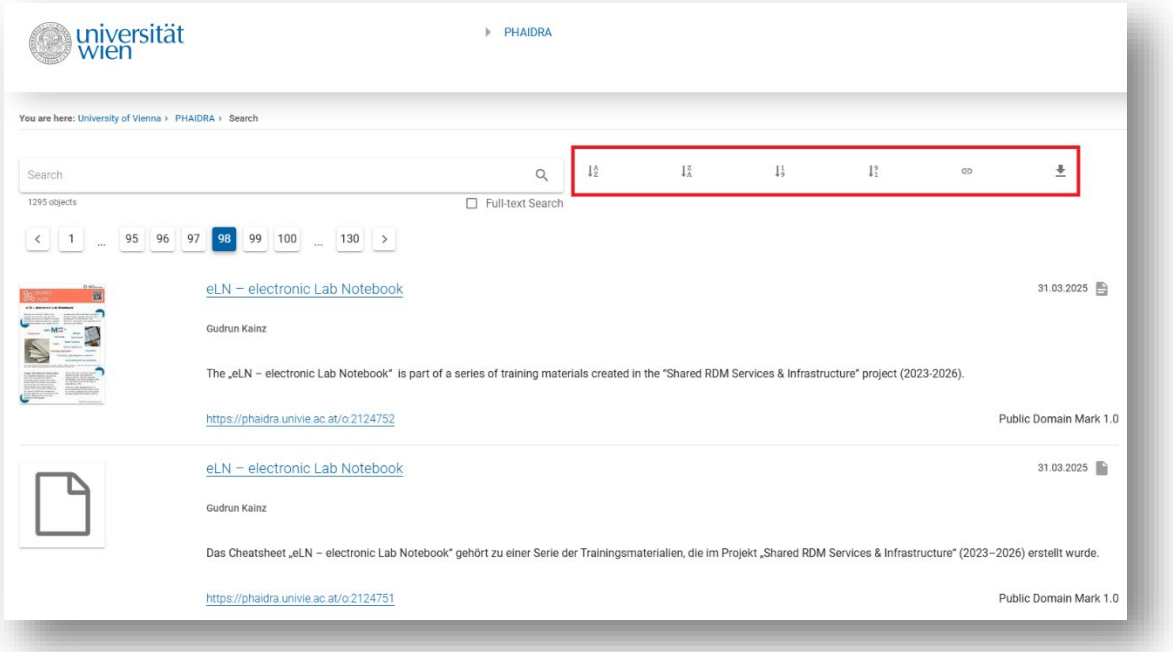

Figure 5: View of search results. Marked in red: functions for sorting, saving and exporting search results.

4.3. Filter options

Various filters are available next to the search bar to further narrow down search results.

Access

- *open* (publicly accessible),
- *restricted* (files are restricted; metadata is still visible).

Type

For the individual categories in this filter, see Figure 6.

Note: Many categories are content-based classifications, not technical object types. Technical object types are described in Chapter 3, Object Types in PHAIDRA. Examples: A map is technically usually an image. An OER or a learning object can be any file type. Container, Resource and Collection are technical object types.

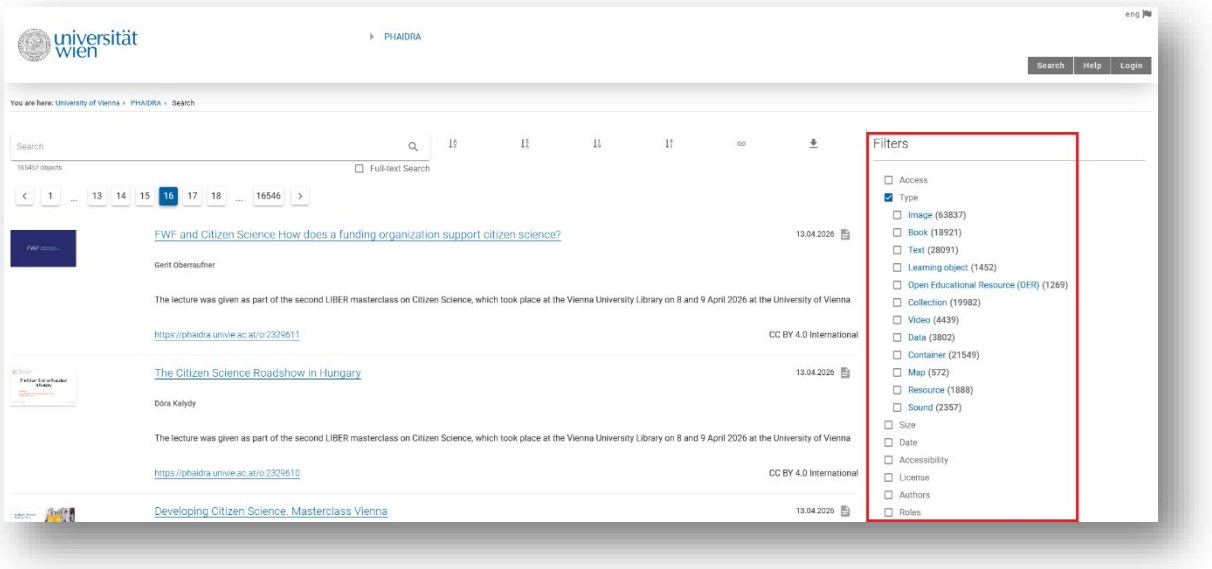

Figure 6: View of search results. Marked in red: filter options. The '*Type*' category is ticked and displays the available options.

Size

File size filter:

- *< 10 MB*,
- *10–50 MB*,
- *50–100 MB*,

- *100–200 MB*,
- *200–500 MB*,
- *500 MB–1 GB*,
- *> 1 GB*.

Accessibility

PHAIDRA supports targeted searches for accessible digital objects using specific accessibility metadata. The Schema.org Accessibility Properties for Findability Vocabulary was used as the basis for this and adapted for the use of digital content in the repository. The following filter options are available in the search:

- *Accessibility Control*
  Specifies how an object can be operated or controlled (e.g. keyboard, mouse, touch).
- *Accessibility Hazard*
  Describes potential barriers or risks, e.g. flickering content, high contrast or auditory stimuli.
- *Accessibility Feature*
  Identifies existing supporting features, e.g. subtitles, structured text, alternative text or transcripts.

Important: The accessibility filters are based exclusively on the metadata entered by the uploaders. They do not constitute an automatic or legal assessment of an item's actual accessibility but are intended to improve the findability of content described in this way.

A detailed description of the individual accessibility metadata fields, along with recommendations on how to use them, can be found in the Guidelines for Metadata for Labelling Accessible Content in PHAIDRA (only available in German).

License

Filter by license:

- *All rights reserved*,
- *GPLv3*,
- *CC BY*,
- *CC BY-SA*,

- *CC BY-NC*,
- *CC BY-ND*,
- *CC BY-NC-SA*,
- *CC BY-NC-ND*.

Date

Upload date (days, months, years).

Authors

Filter by individuals/institutions listed as authors of the digital object (see also Figure 7). The search bars can be used to filter by the names of individuals or institutions, as well as by account names.

Roles

Filter by all assigned roles in relation to the digital object (e.g. photographer, editor, uploader) (see also Figure 7). The search bars can be used to filter by the names of people or institutions as well as by account names.

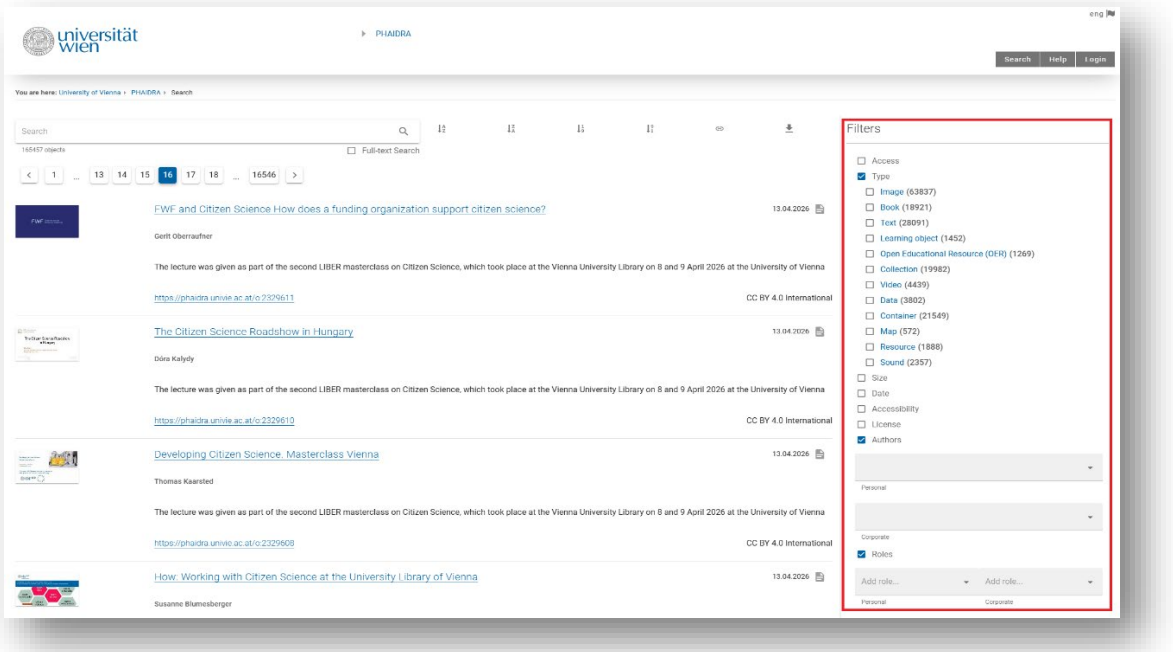

Figure 7: View of search results. Marked in red: filter options. The filter categories *'Authors'* and *'Roles'* are selected and display the search fields that allow filtering by name and account.

4.4. Display of search results

After submitting a search query, PHAIDRA displays the results in a **summary list**. The display is identical for all users (regardless of login status). For each result, PHAIDRA shows (see also Figure 8):

- Thumbnail (if supported and not restricted),
- Title,
- Upload date,
- Object type (icon),
- Role,
- Short description,
- PHAIDRA URL,
- License / legal information,
- Note regarding access restrictions, if applicable.

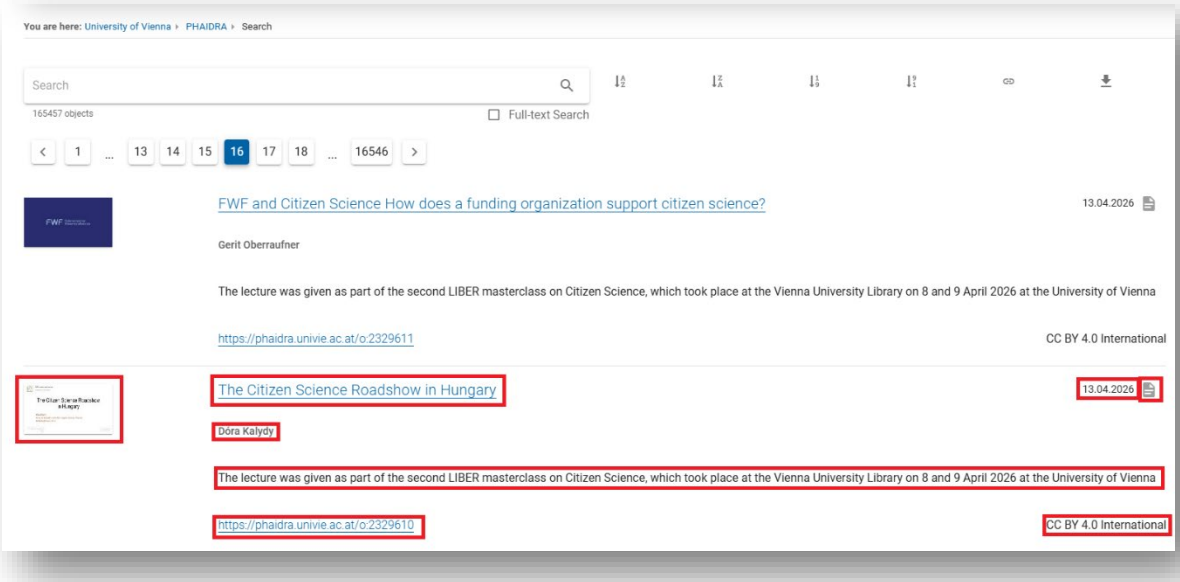

Figure 8: View of search results. Marked in red: thumbnail, title, upload date, object type icon, author, short description, PHAIDRA URL and legal information for object o:2329610.

Clicking on a search result opens the **detailed view** of the digital object (see Figure 9 and Chapter 4 Searching, Finding and Object View → 4.5.).

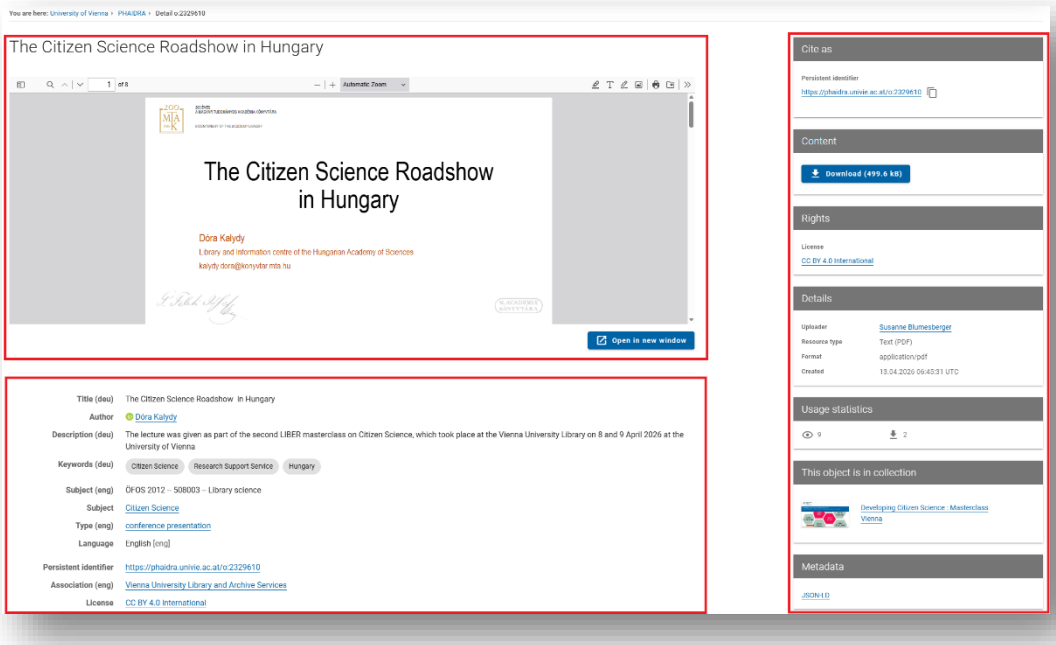

Figure 9: Detailed view of object o:2329610. Marked in red: Preview/viewer area (top left), information and function area (right) and metadata area (bottom left).

4.5. Detailed view of a digital object

4.5.1. Single object

The detailed view of a single digital object consists of three areas (see also Figure 9):

- Preview/viewer area (top left),
- Information and function area (right),
- Metadata area (left/bottom).

The exact display depends on the object type and access rights. The detailed view opens as soon as the preview of a search result is clicked.

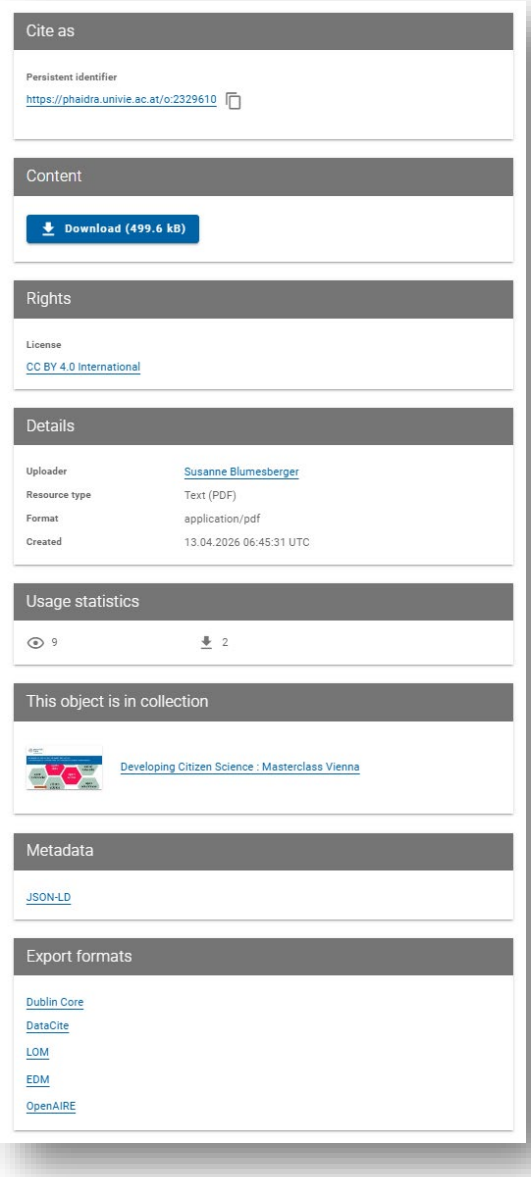

Figure 10: Information and function area of object o:2329610 (detailed view).

Preview/Viewer area (left/top)

The central area displays the file – provided the file format is supported by PHAIDRA and the object is publicly accessible. The display can also be opened in a separate window in full-screen mode. It includes typical viewer functions (zoom, scroll, table of contents, play, pause, volume, progress bar, etc.). For files in unsupported formats, only an icon appears. (Further information on supported file formats can be found in Chapter 6 Creating Objects → 6.1.2. and 6.2.1.1.).

Information and function area (right)

On the right-hand side, technical and administrative information as well as functions are displayed in several boxes, one below the other (see also Figure 10). This area is always visible – regardless of whether the file itself is accessible or not.

Cite as

Contains PHAIDRA URL, and, if available, handle.

Other links and identifiers (if available)

DOI or URI (if available). If a DOI has been assigned, the *Cite* button also is shown. This allows citations to be generated in various styles (e.g. APA, MLA, Chicago). Further information on DOIs can be found in Chapter 5 Persistent Identifiers in PHAIDRA → 5.2.

Content

Download button. For images, downloads are available in various sizes.

Rights

License chosen by the uploader.

Details

Contains technical and administrative details:

- *Uploader*
  Clickable display of the u:account or service account name → opens an email window.
- *Resource type*
  Technical; e.g. *text (PDF)*, *image*, *video*.
- *Format*
  File extension or MIME type; e.g. *application/pdf*, *image/tiff*, *video/mp4*.
- *Created*
  Date and time of upload.

Usage statistics

Display of views (visits to the detail page) and downloads. However, the figures are only approximate guidelines. Automatic accesses (e.g. by bots) may be included.

This object is in collection (if applicable)

Display of any associated collections. The collection name is clickable → leads directly to the collection's detailed view.

Versions (if available)

Display of earlier or later versions of the object. The version titles are clickable → leading directly to the version's detailed view.

Metadata

Contains links to the metadata in JSON-LD / XML and IIIF-MANIFEST formats (for images).

Export formats

PHAIDRA supports several exportable metadata formats, including Dublin Core, DataCite, LOM (Learning

Object Metadata), EDM (European Data Model), and OpenAIRE. The links lead to the complete display of the metadata in the respective formats (for further information, see Chapter 6 Creating Objects → 6.2.1.).

Metadata area (left/bottom)

Below the viewer area is the metadata area, where all information entered in the metadata editor is displayed (see also Figure 11). This area is always visible – regardless of whether the file itself is accessible or not. The metadata is displayed in a structured and reader-friendly manner, following the same logic as that used by uploaders when entering it in the metadata editor. Typically, this area includes:

- *Object type* (content classification, not to be confused with the technical format, e.g. photograph, interview, dataset, learning object);
- *Title*;
- *Subtitle* (if available);
- *Description*;
- *Keywords* (displayed as tags);
- *Roles* (individuals and/or institutions, e.g. author, photographer, data provider);
- *Keyword* (ÖFOS 2012) (scientific classification);
- *Organisational unit* (institutional affiliation; University of Vienna or external institutions);
- *License*.

If the uploaders have used additional metadata fields, these also appear in this section (e.g. *time period*, *project*, *bibliographic metadata*, *accessibility*).

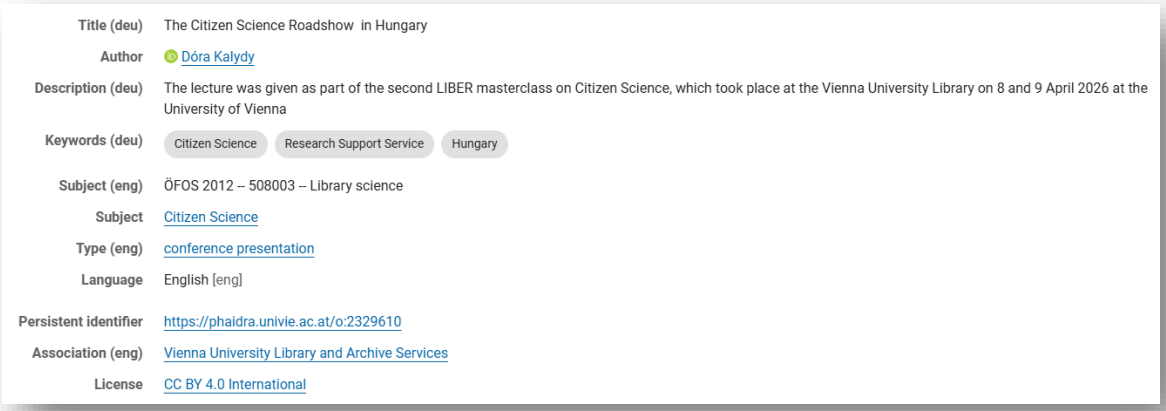

Figure 11: Metadata for object o:2329610 (excerpt from the detailed view).

4.5.2. Collection

The detailed view of a collection is essentially similar to that of an individual object but has some important differences.

Preview/Viewer area (not available)

As collections do not contain files, there is no preview or viewer area.

Information and function area (right)

The right-hand area largely corresponds to that of a single object (e.g. citable links, technical details, export formats) but also includes the *'Content'* box. This shows the number of members of the collection

(digital objects or sub-collections). A list of all members can be accessed via the *'Show members'* button (see also Figure 12).

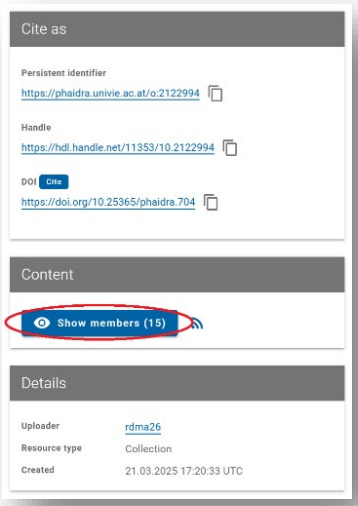

Figure 12: Information and function area of collection o:2122994 (detailed view). Marked in red: the *'Show members'* button.

Metadata area (left/bottom)

The metadata area displays all mandatory fields relevant to collections as well as all optionally filled-in fields.

Members area (below the metadata area)

All **member objects** assigned to the collection are displayed here (including title, preview image where applicable, object type icon, short description, object ID, and, where applicable, a note regarding access restrictions; see also Figure 13).

The members appear in the reverse **order** in which they were assigned to the collection. This display order can be changed at a later stage (see Chapter 9 Collections → 9.2.3.).

Each member of the list can be clicked directly to access the respective detailed view.

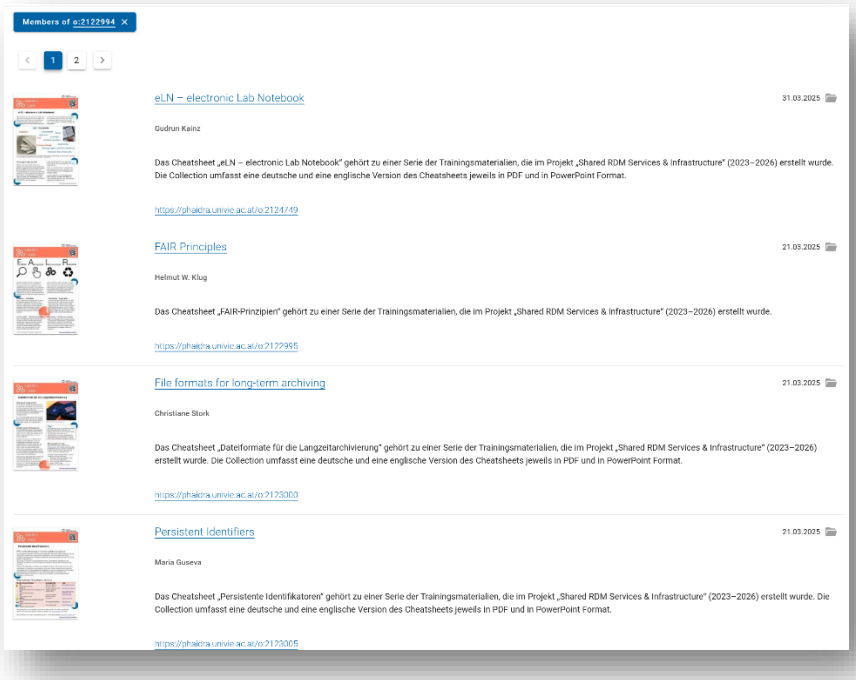

Figure 13: Display of some members of collection o:2122994 (excerpt from the detailed view).

5. Persistent Identifiers in PHAIDRA

Persistent identifiers (PIDs) are **permanent, stable identifiers for digital objects**. They ensure that an object remains uniquely referenceable even if technical details such as servers, storage locations or URL structures change. In PHAIDRA, persistent identifiers play a central role in ensuring the long-term findability and citability of digital objects, thereby contributing significantly to their reusability in research, teaching and study.

5.1. Automatic PID assignment

Every object published in PHAIDRA receives several persistent identifiers:

- a **PHAIDRA link** (a user-friendly URL for direct access to the object) and
- a **handle** (a permanent, system-independent identifier),
- and, optionally, a **DOI** (Digital Object Identifier; see Chapter 5 → 5.2.).

The PHAIDRA link and handle are assigned automatically during the upload process. These identifiers appear in the object's detailed view in the *'Cite as'* box, in the information and function area (on the right; see also Figure 14).

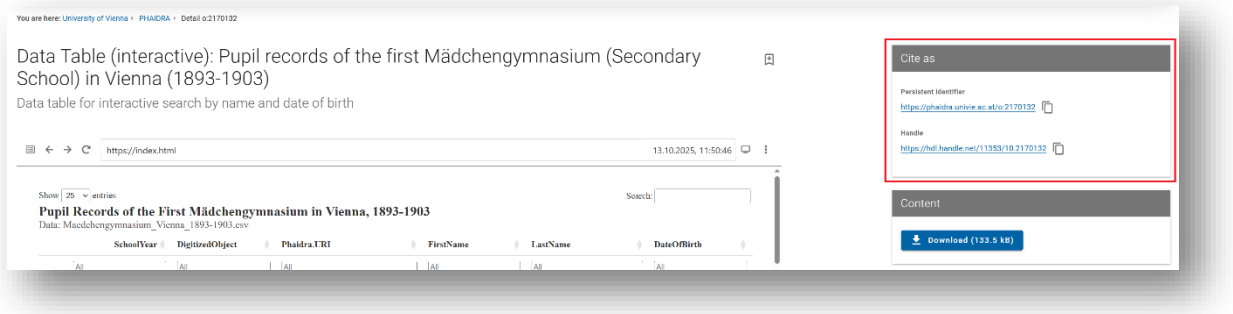

Figure 14: *'Cite as'* box with PHAIDRA URL and handle (detail from the detailed view of object o:2170132).

5.2. DOI assignment

The University of Vienna is a member of DataCite and can register Digital Object Identifiers (DOIs) for digital objects archived in university repositories – including PHAIDRA. DOIs are **not assigned automatically** in PHAIDRA. However, a DOI can be **requested** separately, either **before uploading** (if the DOI is to be embedded in the object itself) or **after uploading** (for objects already archived in PHAIDRA).

Assigning a DOI before uploading

To request a DOI for a digital object before it is uploaded to PHAIDRA, please proceed as follows:

1) Fill in the form on the University of Vienna's DOI Service website (login required).
2) The DOI Support team will send you the **DOI via email**.
3) Insert the **DOI into the digital object** (e.g. a PDF document).
4) **Upload the digital object to PHAIDRA** (see Chapter 6 Creating objects → 6.2.) and enter **the DOI in the relevant metadata field** (see instructions here).
5) Please email the **digital object identifier** (e.g. o:123456) and **the assigned DOI** to DOI Support (support.doi@univie.ac.at).
6) DOI Support will send you a **notification** once the DOI has been activated.

DOI assignment after uploading

To request a DOI for a digital object that is already stored in PHAIDRA, you can either fill in the **form on the University of Vienna's DOI Service website** (login required) or use the ***'Request DOI'*** **function in the PHAIDRA user interface**.

Option 1: Retrospective DOI assignment via form

1) You fill in the form on the University of Vienna's DOI Service website (login required).
2) The DOI Support team will send you the **DOI via email**.
3) Enter **the DOI into the corresponding metadata field** for your digital object in PHAIDRA (see instructions here) → The DOI will be displayed in the *'Other links and identifiers'* box in the object's detailed view and can be used for citations.

Option 2: Retrospective DOI assignment via the PHAIDRA user interface

1) **Log in** to PHAIDRA.
2) Open the relevant object in the **detailed view**.
3) Click on ***'Request DOI'*** in the *'Cite as'* box in the **information** and function area (on the right) → A window will open.
4) Confirm the request by clicking on ***Request DOI***.

5) The DOI Support team will send you the **DOI via email**.

6) Enter **the DOI into the corresponding metadata field** for your digital object in PHAIDRA (see instructions here) → The DOI is displayed in the *'Other links and identifiers'* box in the object's detailed view and can be used for citations.

6. Creating objects

6.1. Overview: How does uploading to PHAIDRA work?

Creating a new object in PHAIDRA generally involves the same basic steps:

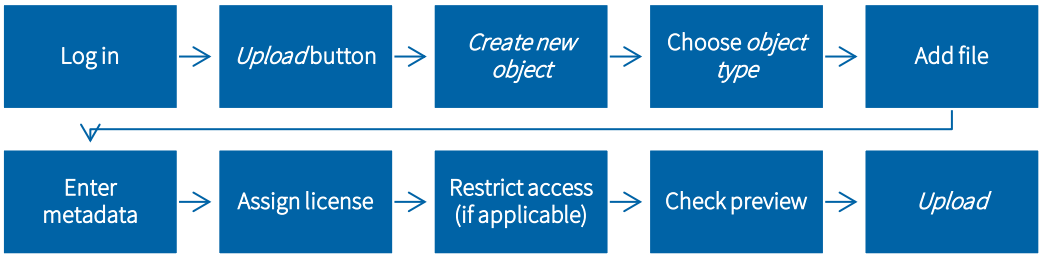

Figure 15: Overview of the process for creating a new digital object in PHAIDRA.

The steps *'Add file'* and *'Assign license'* are omitted when creating collections. Both take place at the member object level, not at the collection level (see Chapter 9 Collections).

PHAIDRA does not save drafts during the upload. An object only exists in the repository once the upload is fully complete.

Uploaded objects are not checked by PHAIDRA Support prior to publication. As soon as an uploader has uploaded an object, it is published immediately in accordance with the selected access settings. The uploader is responsible for ensuring that the content complies with legal, ethical and institutional requirements. Further information can be found in PHAIDRA's Policy and Terms of Use.

6.1.1. Which upload options are available?

When you click on the *Upload* tab in the navigation bar, the following options are available (see also Figure 16):

- *Create new object*
  For individual items, archive folders or collections.
- *Open Educational Resources (OER) upload*
  Special metadata form for openly licensed teaching and learning materials (see Chapter 7 Open Educational Resources (OER) in PHAIDRA).
- *Upload publication (via u:scholar)*
  u:scholar is the University of Vienna's institutional repository for academic publications (e.g. journal articles, working papers, monographs, conference papers). Uploads are carried out via a special workflow with specific metadata and verification processes. From a technical perspective, the publications

are stored, archived and made searchable in PHAIDRA. Advice, legal enquiries and information on uploading can be found on the University of Vienna's Open Access website or via the Open Access Office (openaccess@univie.ac.at).

- *Open template*
  Useful if recurring metadata is to be used (see Chapter 6 Creating objects → 6.3.).

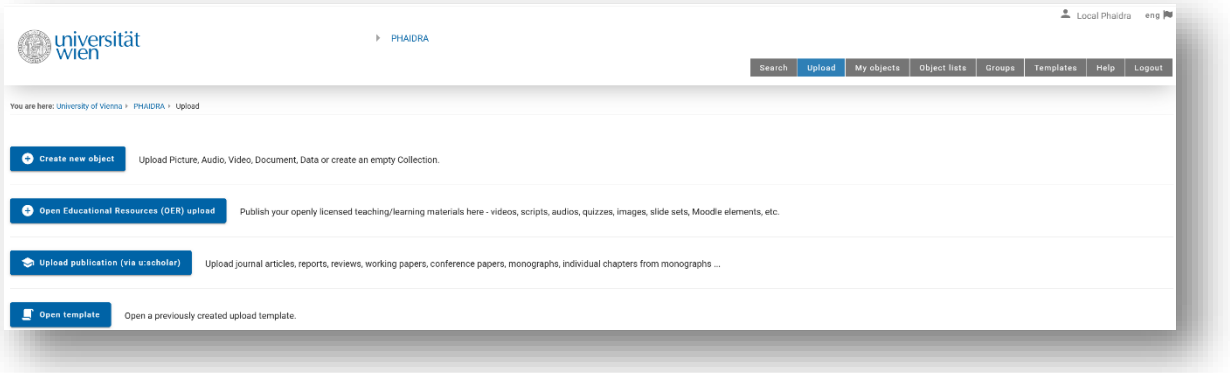

Figure 16: Upload options after clicking on the *Upload* tab.

6.1.2. Technical requirements

The following technical requirements apply when uploading files:

File size: Uploads via the user interface generally work reliably up to approx. 15 GB. For very large files, we recommend contacting PHAIDRA Support (support.phaidra@univie.ac.at) before uploading.

Supported file formats: All file formats are accepted. A preview is only available for certain media types in specific file formats (see Chapter 6 Creating objects → 6.2.1.1.).

Network: Uploads generally work outside the university network as well. However, a university network connection is required to use the Sandbox (see Chapter 12 PHAIDRA Sandbox (Test Environment) → 12.1.).

6.1.3. What happens after uploading?

Upon successful upload, the digital object automatically receives a PHAIDRA URL (object ID) and a handle, as well as a detailed view with a preview (if supported), metadata, download options (depending on the access rights set), and usage statistics.

It should be emphasised once again that uploaded objects are not checked by PHAIDRA Support prior to publication. As soon as an object has been uploaded, it is published immediately in accordance with the selected access settings. The uploader is responsible for ensuring that the uploaded content complies with

legal, ethical and institutional requirements. Further information can be found in PHAIDRA's Policy and Terms of Use.

6.2. Create a new object

Digital objects (individual objects, archive folders or collections) are created via the user interface. To do this, users log in to PHAIDRA, either with an individual u:account or with a service email address (see Chapter 2 Login and Home Page → 2.1.).

Workflow – First steps

7) Log in to PHAIDRA.

8) Click on the *Upload* tab in the navigation bar (see Figure 17).

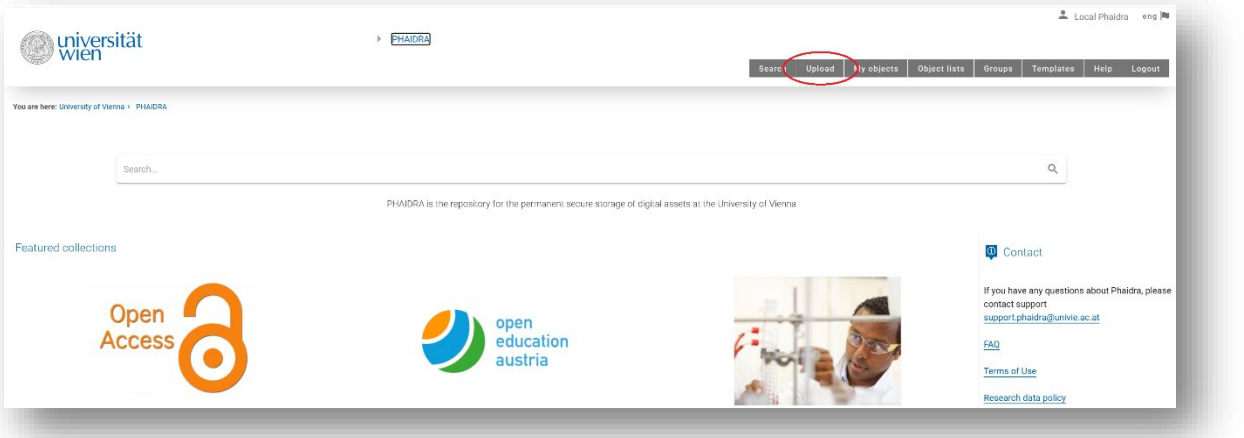

Figure 17: PHAIDRA home page (after successful login). Marked in red: *Upload* tab in the navigation bar.

9) Click on *Create New Object* (see Figure 18).

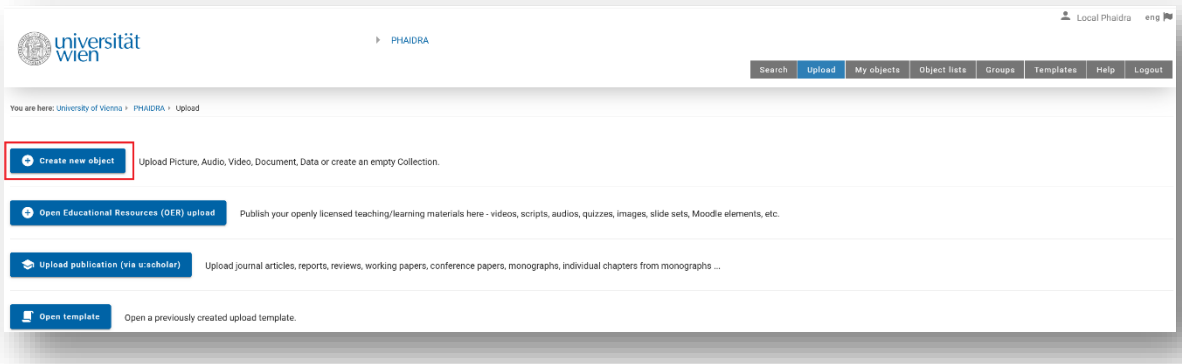

Figure 18: Upload options after clicking the *Upload* tab. Highlighted in red: the *Create new object* button.

10)→ The **metadata editor** opens (see Figure 19).

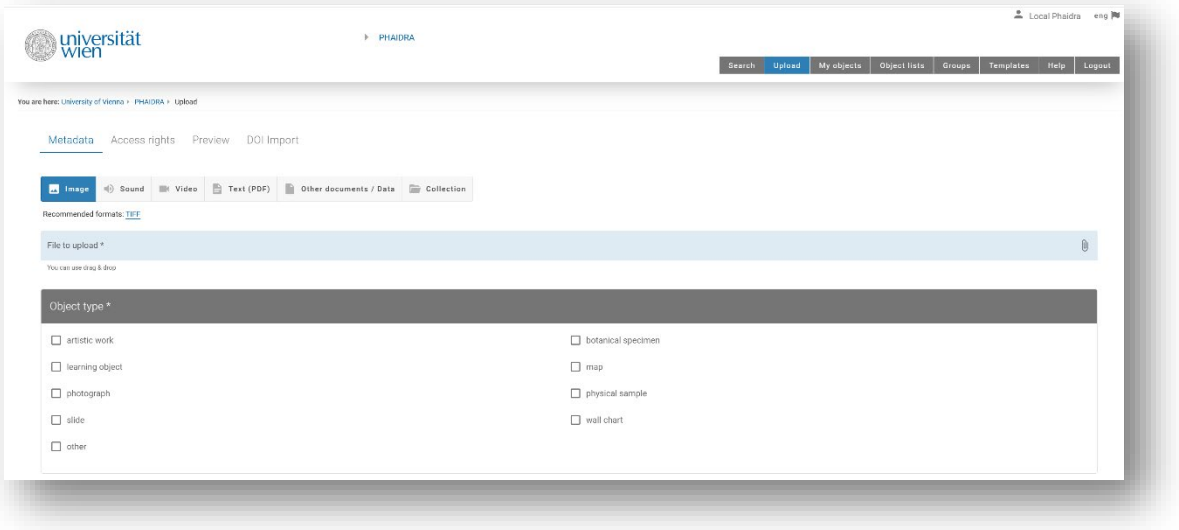

Figure 19: Metadata editor (detail). The *Metadata* tab is open by default, and the object type *Image* is selected by default.

6.2.1. Metadata

In the *Metadata* tab of the metadata editor, PHAIDRA provides metadata fields for each object:

- Mandatory fields
  All fields marked with an asterisk must be completed. The object cannot be saved without these fields (see Figure 20).

- Optional fields
  All other metadata fields are optional and can be added if additional information is relevant. The *'+Add metadata field'* button allows to select from a list of around 100 available fields (see Figure 21).

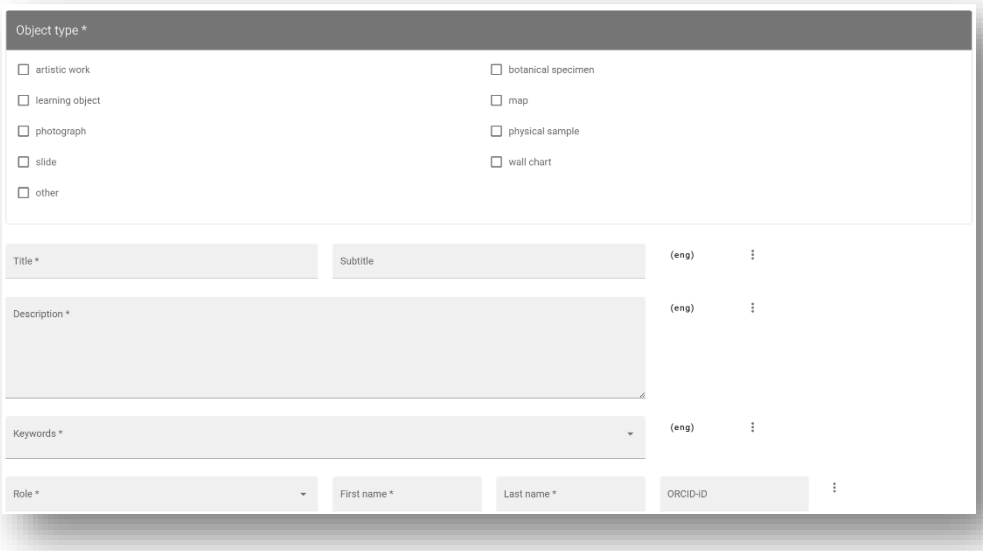

Figure 20: Metadata editor (detail). Mandatory fields are marked with an asterisk.

Next to each metadata field, **the language** in which the information is entered has to be specified (e.g. *deu* or *eng*). By clicking on the **three vertical dots** to the right of the field, the corresponding field can be **duplicated** and thus used as often as required. This allows, for example, titles, descriptions or keywords to be entered in multiple languages. This is possible for all fields, except for the **license field**.

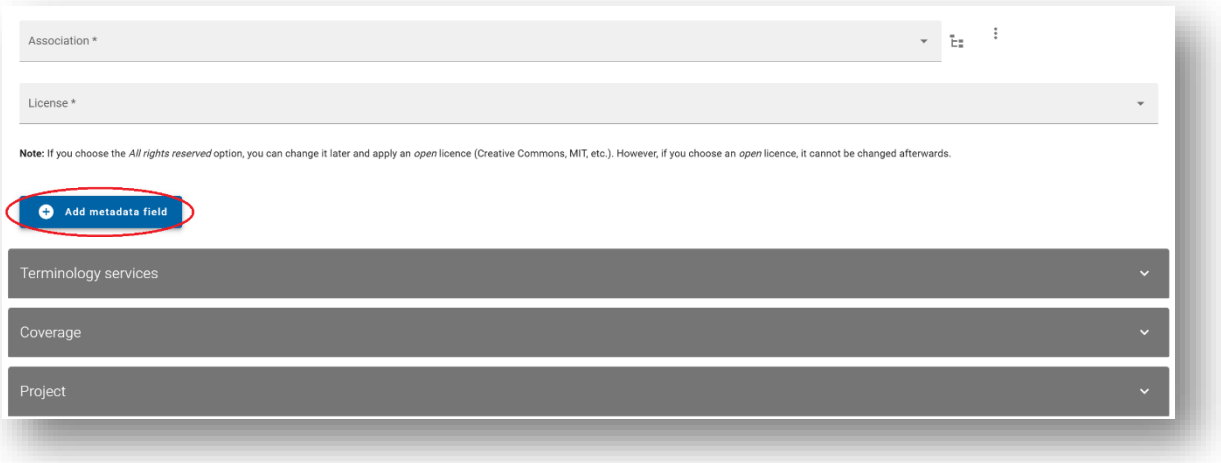

Figure 21: Metadata editor (detail). Marked in red: The '+ *Add metadata field*' button, which can be used to load additional (optional) fields into the editor.

The metadata recorded in PHAIDRA is not only used for display within the repository but can also be **exported in standardised metadata formats**. This supports the reuse, sharing and visibility of the objects in external systems and search services.

PHAIDRA provides metadata in the following formats:

- Dublin Core
  A widely used, general metadata standard.
- DataCite
  Specifically for research data and citable objects.
- LOM (Learning Object Metadata)
  For teaching and learning materials.
- EDM (Europeana Data Model)
  For cultural and collection-related objects.
- OpenAIRE
  For integration into research information systems and open science infrastructures.

The exported metadata is based on the information entered in the metadata editor. The export formats can be accessed in the detailed view of an object in the information and function area (on the right) (see Chapter 4 Searching, Finding and Object View → 4.5.).

6.2.1.1. Mandatory fields

Object type* (in the technical sense)

The first mandatory metadata field that must be specified is the object type (in the technical sense). This determines whether and how the object is displayed in the PHAIDRA viewer but has no effect on the actual storage of the file. The following object types are available (see also Figure 19):

- *Image*
  For TIFF, JPG/JPEG, JPEG 2000, PNG, GIF and BMP files.
- *Audio*
  For WAV, FLAC, MP3 and OGG files.
- *Video*
  For AVI, MPEG, MKV, MP4 and QuickTime (MOV) files.
- *Text (PDF)*
  For PDF files.

- *Other documents / data*
  For archive folders (e.g. ZIP, TAR) and all other file formats.

- *Collection*
  For creating a structural object that does not contain a file, but rather groups together several other PHAIDRA objects.

The file formats listed here are recommended formats for PHAIDRA. They are particularly well suited for long-term archiving and furthermore allow for direct preview and use within the repository. If files are uploaded in formats other than those given above, PHAIDRA will still store them securely, but they will not be displayed directly in the viewer.

File to upload*

The file (a single file or an archive folder) is added here (not applicable for the 'Collection' object type) (see also Figure 19).

Object type* (in terms of content)

PHAIDRA allows a single or multiple selections for the content-based classification of the object type (not applicable for the *'Collection'* object type).

Object type *Image* (see also Figure 19):
Available categories: *artistic work, botanical specimen, learning object, map, photograph, physical sample, slide, wall chart, other.*

Object type *Audio*:
Available categories: *artistic work, interview, learning object, lecture, musical composition, other*.

Object type *Video*:
Available categories*: artistic work, interview, learning object, lecture, other*.

Object type *Text (PDF)*:
Available categories: *artistic work, bibliography, book, book part, conference object, conference presentation, data management plan, journal article, learning object, lecture, letter (correspondence), magazine, magazine article, musical notation, newspaper, preprint, project deliverable, report, research report, review, technical report, thesis, working paper, other.*

Object type *Other documents / Data*:
Available categories: all options from the other object types, plus *3D model, archival collection, dataset, herbaria, website.*

Title*

Free text field for the **object's description** (see also Figure 22).

Subtitle

Optional field for a **more detailed description of the object** (see also Figure 22).

Language of the object (only for object type Text (PDF))

Field for specifying the language of a text document (see also Figure 22).

Description*

Free-text field for **a description of the object's content**. Depending on the material, various pieces of information can be entered here (e.g. abstract, summary, context, methodology, analysis, technical details, notes on reuse, target audience, etc.; see also Figure 22).

Keywords*

Free-text field for **any number of keywords**, which are displayed as tags. Each entry is confirmed by pressing Return; multi-word entries are also possible (see also Figure 22).

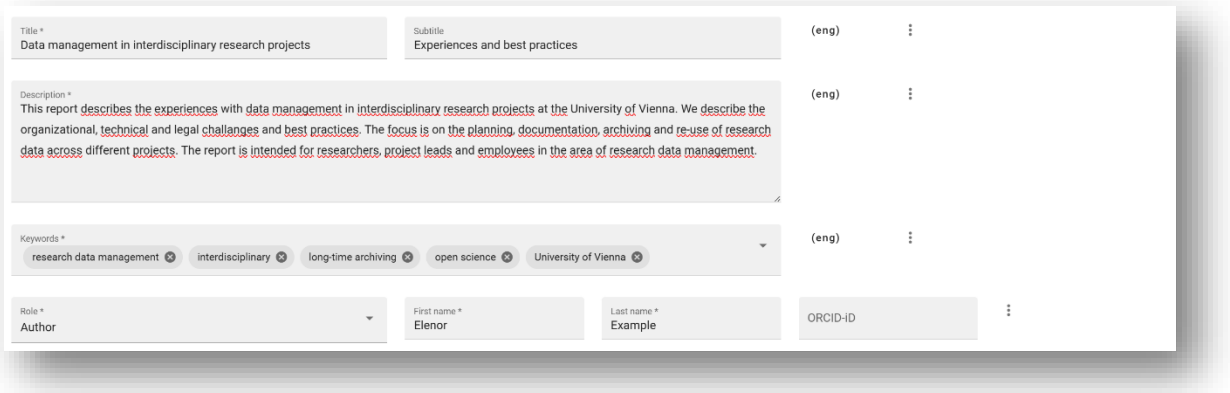

Figure 22: Metadata editor (detail). Metadata fields have been filled in as examples (object type: *Text (PDF)*).

Role*

Field for specifying individuals and/or institutions related to the object or collection (see also Figure 22).

Person roles:
When adding a person, **the first name and surname** must be entered. The person's **ORCID iD** may be

added optionally. This creates a link from the object's metadata in PHAIDRA to the person's ORCID record; however, no data exchange takes place between ORCID and PHAIDRA.

By clicking the three dots next to the input field, this can be **expanded** (or duplicated) and additional details can be added – biographical data, identifiers (ORCID, GND, VIAF, Wikidata ID, LCNAF, ISNI, URI), institutional affiliation (see also Figures 23, 24 and 25).

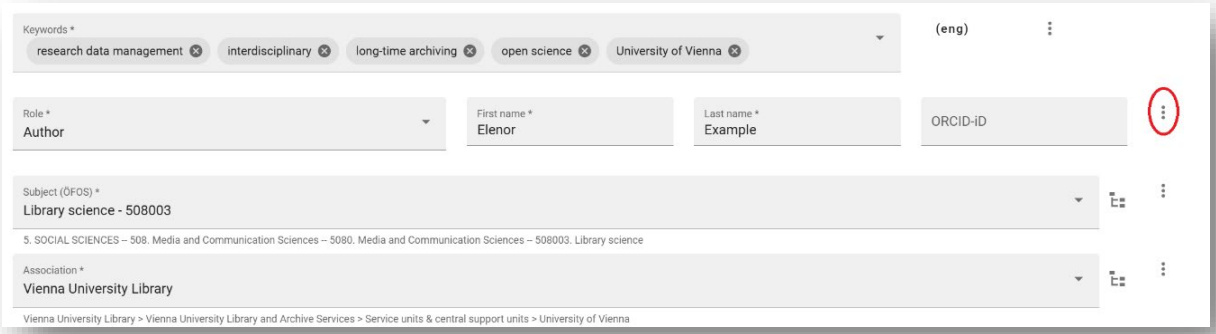

Figure 23: Metadata editor (detail). Metadata fields have been filled in as examples. Marked in red: button to duplicate, move or expand the field.

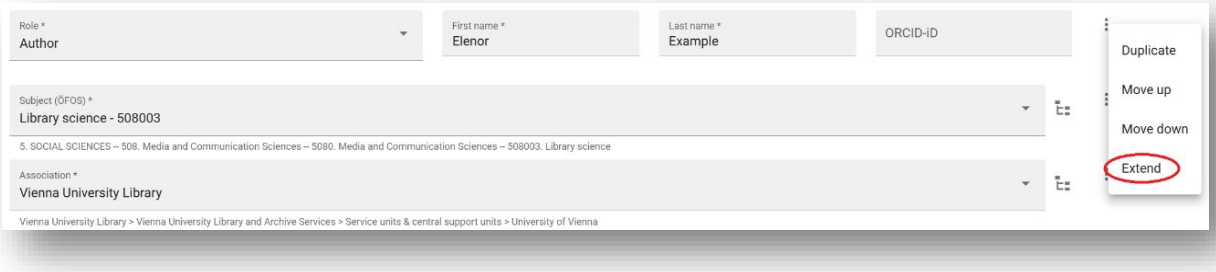

Figure 24: Metadata editor, *Role* section. Some metadata fields have been filled in as examples. Marked in red: button to expand the field (opens by clicking on the three vertical dots to the right of the metadata field).

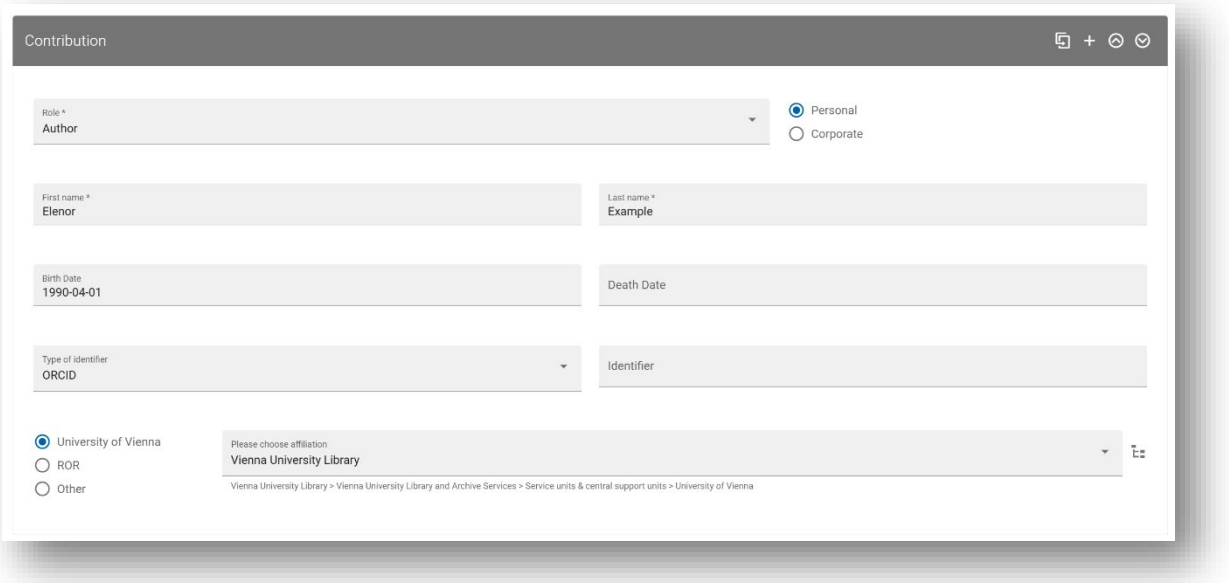

Figure 25: Metadata editor, *Role* section. The section has been expanded; some metadata fields have been filled in as examples.

Institutional roles:

Here, the **University of Vienna** or **another institution** can be selected. In the case of the University of Vienna, a specific organisational unit can be specified, via either the drop-down list or the hierarchical view. Other institutions can be searched for and selected using the Research Organisation Registry (ROR). If the relevant institution does not have an ROR-ID, select the *'Other'* option and enter the name of the institution manually (see Figure 26).

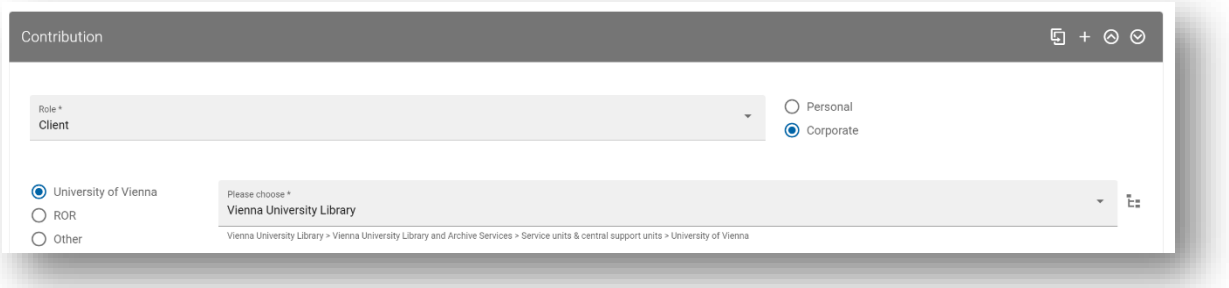

Figure 26: Metadata Editor, *Role* section. The section has been expanded, and some metadata fields have been filled in as examples.

Keyword (ÖFOS)*

Classification field according to ÖFOS 2012 (Austrian Classification of Scientific Disciplines; see also Figure 27). Each object must be assigned at least one ÖFOS category. There are two selection modes:

- Drop-down search
  Simply search for terms, e.g. *archaeology*, *environmental engineering*, *musicology*.

- Hierarchical display
  Tree structure of academic disciplines, e.g. *5. SOCIAL SCIENCES → 508. Media and Communication Sciences → 5080. Media and Communication Sciences → 508003. Library Science* (see also Figure 28).

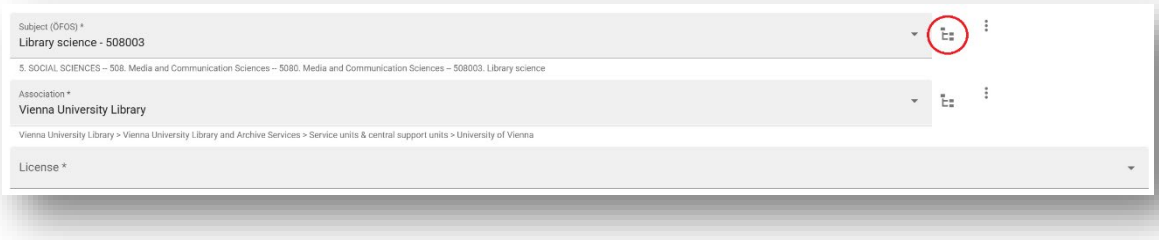

Figure 27: Metadata editor (detail). Marked in red: The button to open the hierarchical view of the ÖFOS.

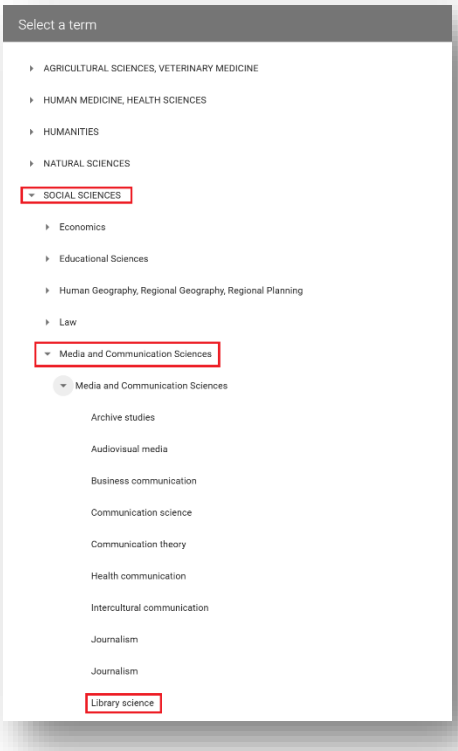

Figure 28: Metadata editor, metadata field *'Keyword' (ÖFOS)*, hierarchical view. Marked in red: the categories *SOCIAL SCIENCES → Media and Communication Sciences → Library Science*.

Organisational unit*

Field for the **institutional affiliation of the object** (see also Figure 29). There are two main options:

- *Organisational unit of the University of Vienna*
  Selection via drop-down menu or hierarchical structure.
- *External institution*

Note: Multiple entries are possible. An object can be assigned to both a University of Vienna organisational unit and an external institution, if this applies.

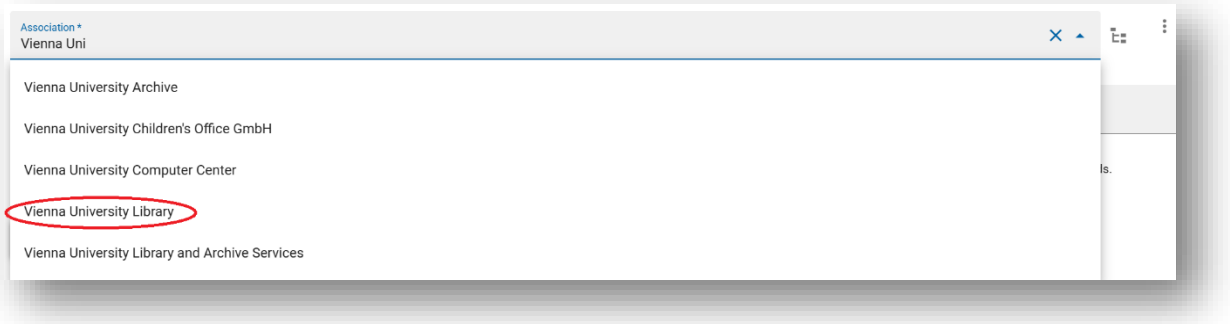

Figure 29: Metadata editor, *'Organisational Unit'* metadata field. Typing the first few letters opens the drop-down menu. Highlighted in red: the organisational unit *'Vienna University Library'*.

License*

Field for the **legal information** specifying how the content may be used (not applicable for the 'Collection' object type).

The following options are available:

- *Public Domain Mark*
  There are no copyright restrictions. This means that others may reuse or distribute your data.
- *Creative Commons licenses*
  These allow reuse under certain conditions, depending on the license chosen (e.g. CC BY allows the reuse and distribution of your data, but requires attribution).
- *MIT License*
  It permits the reuse, modification and distribution of software, provided that the license and copyright notice are retained.

- *All rights reserved*
  The copyright holder retains all rights and the data may not be reused or distributed without their express permission.

Important: The license **cannot be changed after upload**, with one exception: a license can be changed from *All rights reserved* to an open license (e.g. *CC BY*). Conversely, a change from *CC BY* to *All rights reserved* is NOT possible. This means: **all legal issues must be clarified before upload**. Uploaders must ensure that they hold the rights to publish the content. The **RDM Legal Helpdesk** (rdm@univie.ac.at) offers advice.

6.2.1.2. Additional fields

In addition to the mandatory fields, the metadata editor offers **numerous optional metadata fields** that can be added as required. This allows objects to be described in much greater detail.

There are two ways to use additional metadata:

- free selection from all available fields via the *'+ Add metadata field'* button (see also Figure 21),
- predefined thematic areas that offer grouped fields: *Terminology services*, *Coverage*, *Project*, *Represented object*, *Bibliographic metadata*, *Accessibility*.

All areas are explained in detail below.

+ Add metadata field

Clicking this button opens the complete list of all **approximately 70 metadata fields** supported by PHAIDRA (see Figure 30). Uploaders can select any field (see Figure 31) and load it into the metadata editor by clicking *Add* (see Figure 32). Each field is accompanied by a brief description of its intended use.

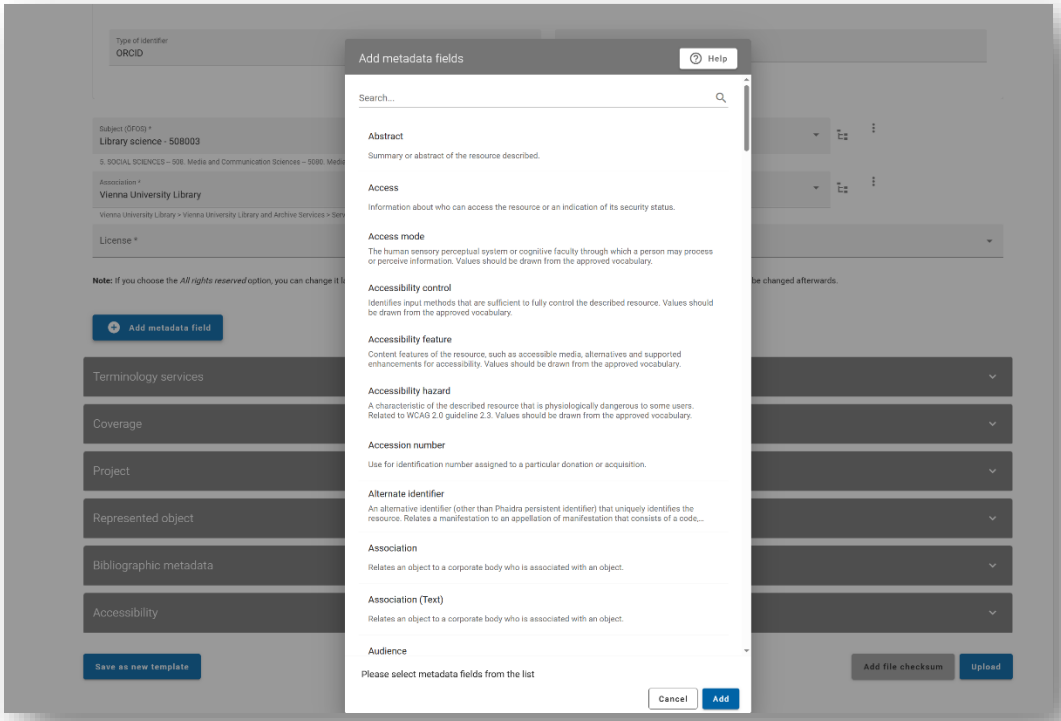

Figure 30: Metadata editor (detail). The list of all available metadata fields (shown here in the foreground) opens by clicking on *+Add metadata field* (shown here in the background).

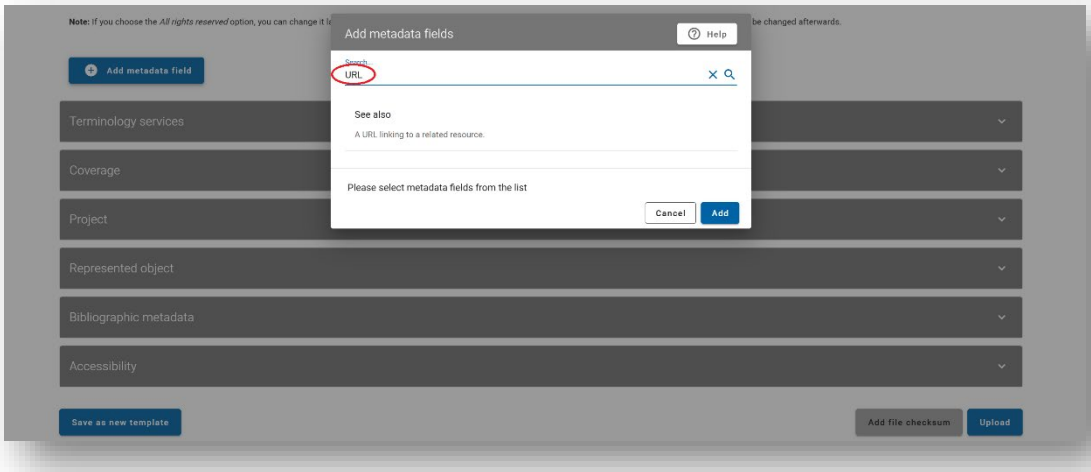

Figure 31: Metadata editor (detail). You can search for suitable metadata fields by entering text in the search bar. Clicking on a search result selects the corresponding metadata field.

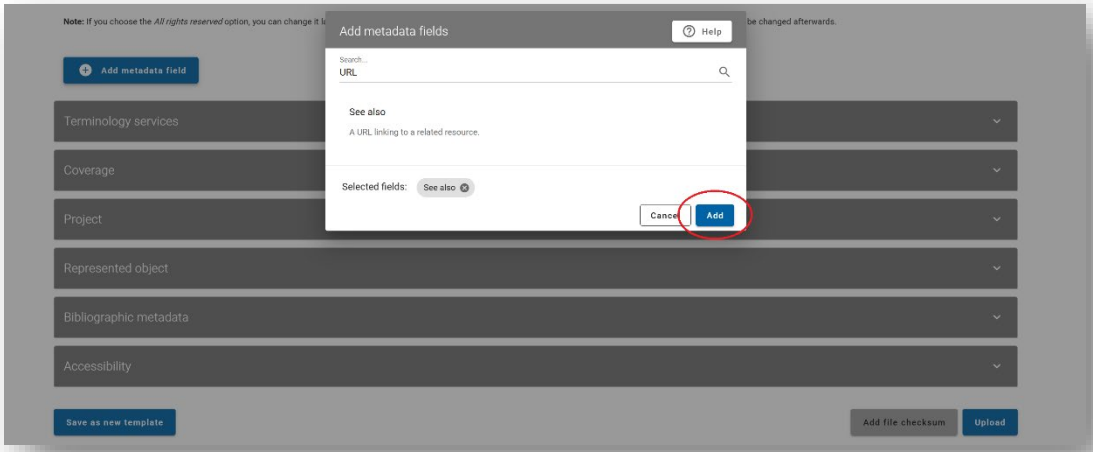

Figure 32: Metadata editor (detail). Clicking *'Add'* loads the selected metadata field into the editor, where it can then be used.

Terminology services

This section utilises controlled vocabularies (see also Figure 33). Included fields are:

- *GND keyword*
  Term from the Integrated Authority File ("Gemeinsame Normdatei" or GND).

- *Basic Classification*
  Bibliographic science area classification.

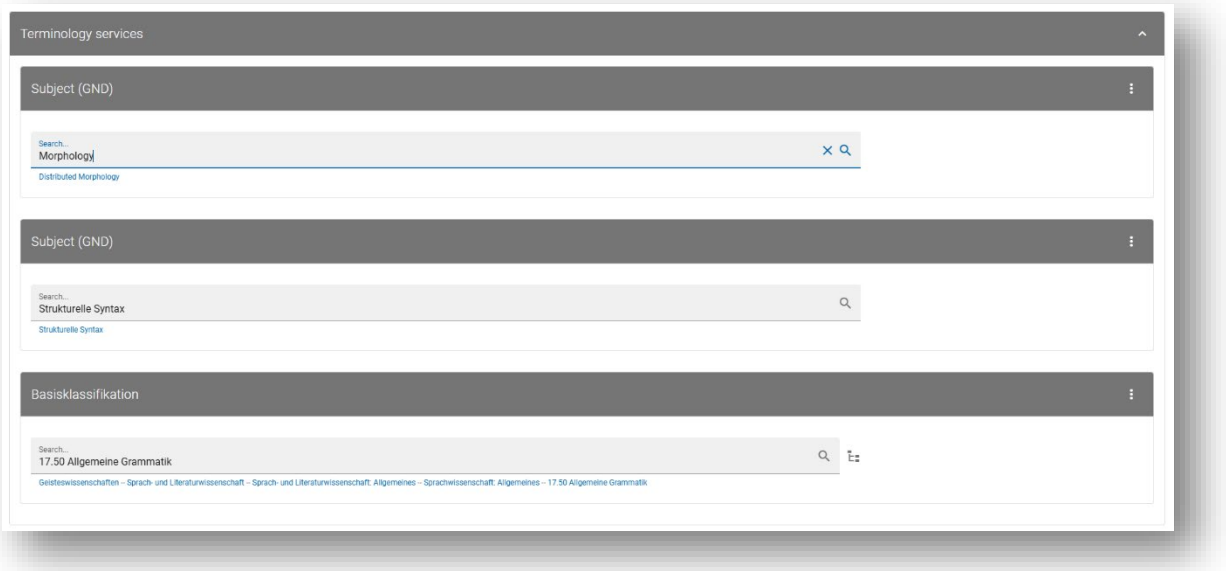

Figure 33: Metadata Editor, *Terminology Services* section. The metadata fields have been filled in as examples; the *Keyword (GND)* field has been duplicated.

Coverage

This section describes the **temporal and spatial coverage of the content** (see also Figure 34). Fields included are:

- *Temporal coverage*
  Free-text field; entries in various formats are possible (e.g. *1900–1920* or *12th century*).

- *Depicted/Represented place* (Geonames)
  Exact location details via the Geonames service.

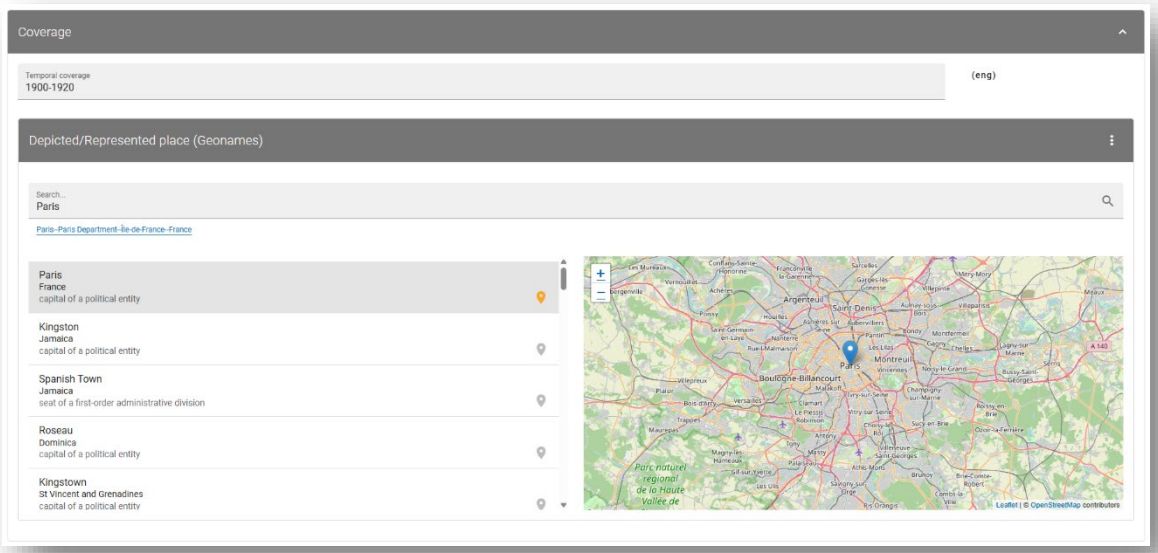

Figure 34: Metadata editor, *Coverage* section. The metadata fields have been filled in as examples.

Project

This section is used to link an object to a research project (see also Figure 35). Fields included are:

- *Title*,
- *Description*,
- *Date from – to* (project duration),
- *Acronym*,
- *Code / Identifier* (e.g. FWF number, EU project number),
- *Homepage*,
- *Type of identifier* + *Identifier*,
- *Funder name* + *Type of funder identifier* + *Funder identifier*.

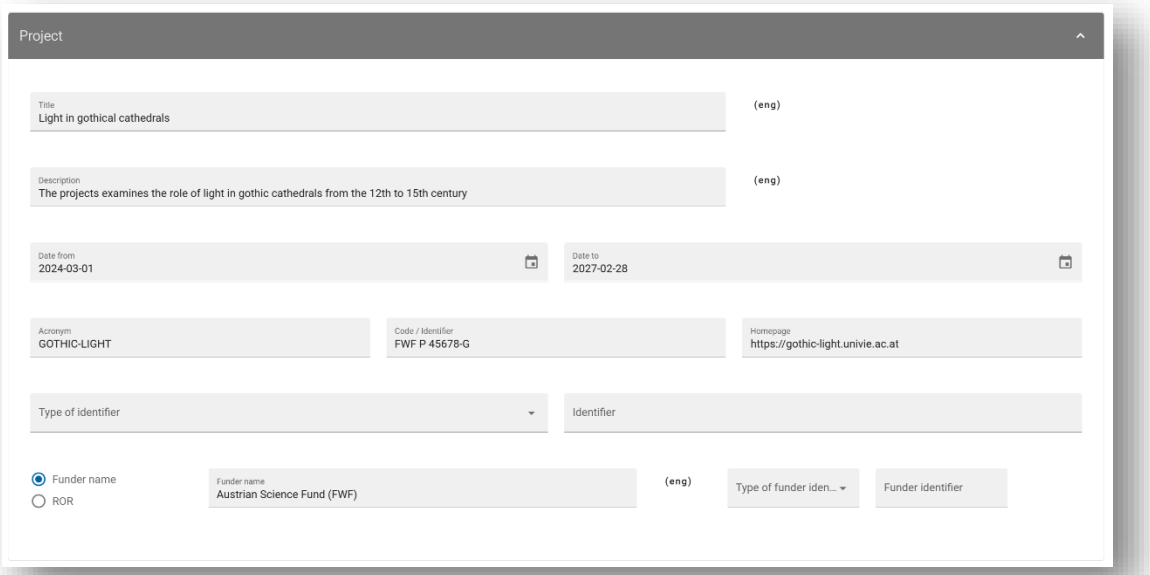

Figure 35: Metadata editor, *Project* section. Some metadata fields have been filled in as examples.

Represented object

This section is particularly relevant for digitised items, archival sources and collection objects. Fields included (see also Figure 36):

- *Type of date* (e.g. Date created, Date modified) + *Date*,
- *Inscription*,
- *Call number*,
- *Accession number*,
- *Provenance*,
- *Production company*,
- *Production place*,
- *Physical location*,
- *Condition*,
- *Height* (+ *unit of measurement*),

- *Width* (+ *unit of measurement*),
- *Depth* (+ *unit of measurement*),
- *Diameter* (+ *unit of measurement*),
- *Material*,
- *Technique*.

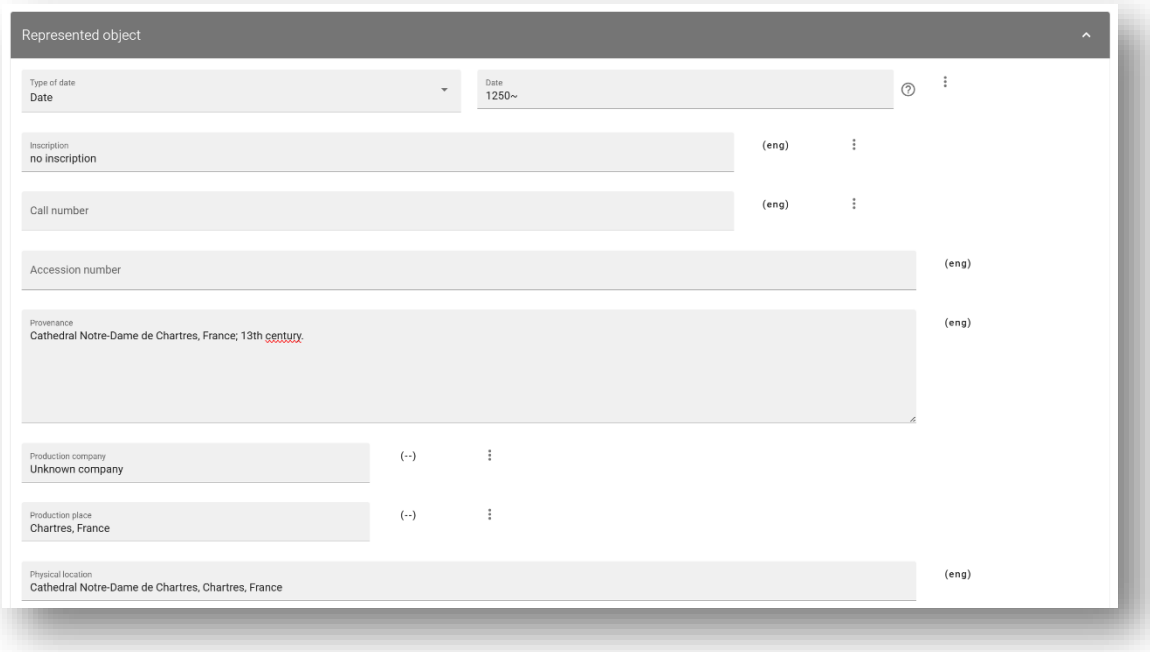

Figure 36: Metadata Editor, *Represented Object* section. Some metadata fields have been filled in as examples.

Bibliographic metadata

This section is important for text objects, articles, scans and anything else with a bibliographic structure. Persistent identifiers that have already been assigned (e.g. DOIs) can also be entered here in the metadata of the digital object. Fields included:

- *Type of identifier* (e.g. DOI, Handle, ISBN) + *Identifier*,
- *Type of date* (e.g. Date issued, Date created) + *Date*,
- *Volume*,
- *Issue*,

- *From page,*
- *To page.*

Section *Is in series*:

- *Title*,
- *Volume*,
- *Issue*,
- *Issued*,
- *ISSN*,
- *Type of identifier + Identifier.*

Section *Is contained in:*

- *Title + Subtitle*,
- *Role (e.g. Editor) + First name + Last name,*
- *Page start + Page end,*
- *ISBN,*
- *Type of identifier + Identifier.*

Section *Series:*

- *Title*,
- *Volume + Issue,*
- *Issued,*
- *ISSN,*
- *Type of identifier + Identifier.*

Section *Publisher:*

- *University of Vienna | Publisher*,

- *Publisher,*
- *Place + Date*.

Section *Publication:*

- *University of Vienna* / *ROR-ID* / *Publisher*,
- *Publisher*,
- *Place + Date*.

Note: To enter an existing **DOI** for your digital object, you can enter it in the *Identifier* field. *The Identifier type* is already set to DOI (see Figure 37). The DOI is automatically displayed in the object's detailed view under *'Other links and identifiers'* after uploading. Information on DOI assignment can be found in Chapter 5: Persistent Identifiers in PHAIDRA.

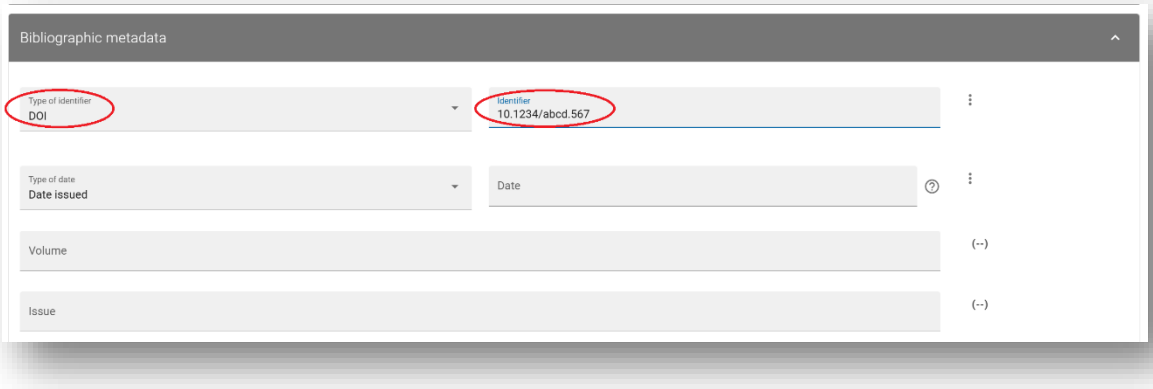

Figure 37: Metadata Editor, *Bibliographic Metadata* section. Marked in red: The metadata fields *Identifier Type* and *Identifier*. Existing identifiers for the digital object can be entered here.

Accessibility

These optional metadata fields can be used to describe how barrier-free a digital object is (see also Figure 38). The fields are based on the Schema.org Accessibility Properties for Findability Vocabulary, adapted for use in PHAIDRA. Fields included are:

- *Accessibility control*
  Describes how the object can be operated (e.g. keyboard, mouse, touch).
- *Access mode*
  Describes the primary mode of perception of the content (e.g. visual, auditory).

- *Accessibility hazard*
  Indicates potential barriers or risks (e.g. flickering content, loud sounds).

- *Accessibility feature*
  Identifies existing supporting features (e.g. subtitles, structured text, transcript).

Filling in these fields is optional, but is particularly recommended for teaching materials and OER, as it improves the findability of barrier-free content via the search filters in PHAIDRA. Further information on the meaning of the individual fields and recommendations for their use can be found in the Guidelines for metadata for labelling accessible content in PHAIDRA (only available in German).

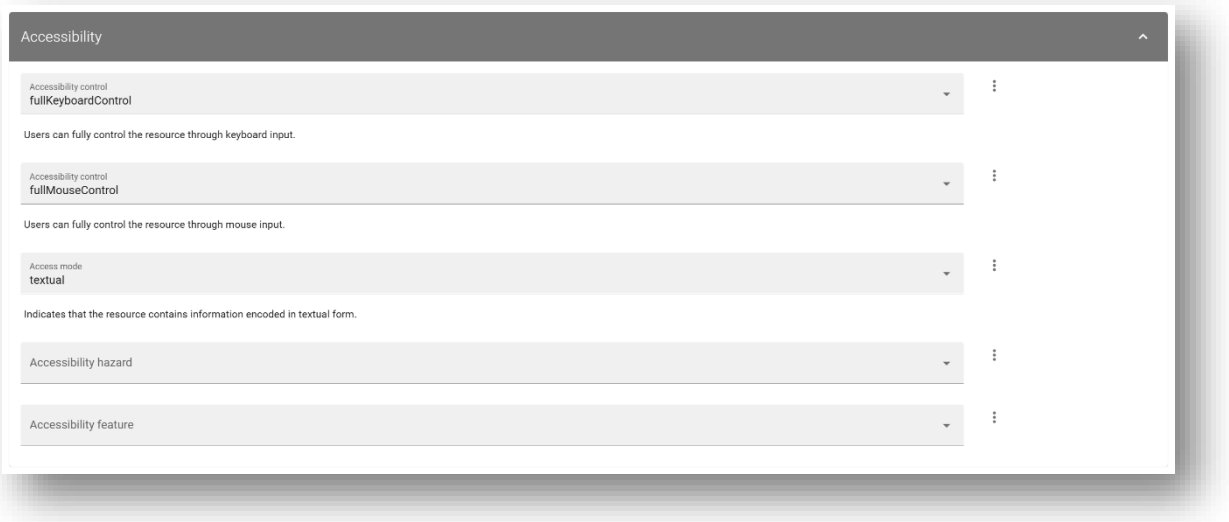

Figure 38: Metadata editor, *Accessibility* section. Some metadata fields have been filled in as examples; the *Accessibility control* field has been duplicated.

6.2.2. Access rights

The *Access rights* tab in the editor is used when access to an object is to be restricted. Access rights apply only to files, not to metadata.

If nothing is changed here, the default setting remains: ***the object is currently accessible worldwide without restrictions*** (see also Figure 39). This means that the files (preview and download) are publicly accessible worldwide. The metadata always remains publicly visible, regardless of any restrictions.

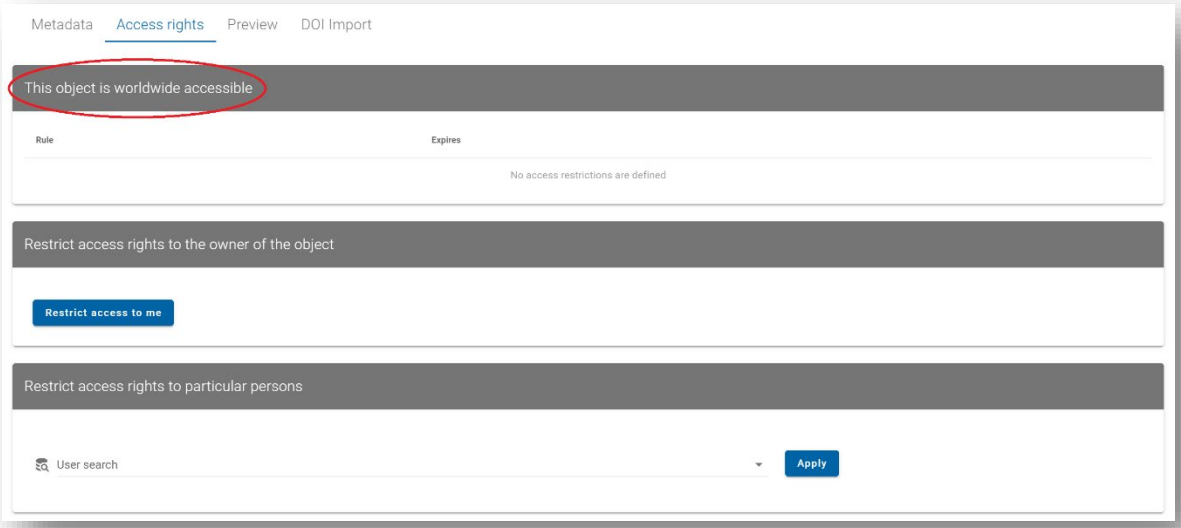

Figure 39: Metadata Editor, *Access rights* tab. Highlighted in red: the default setting is that the object is accessible worldwide without restrictions (no access restrictions have been set).

If an access restriction is set, it appears in the upper section under: ***The following entities have access to the object*** (see Figure 40).

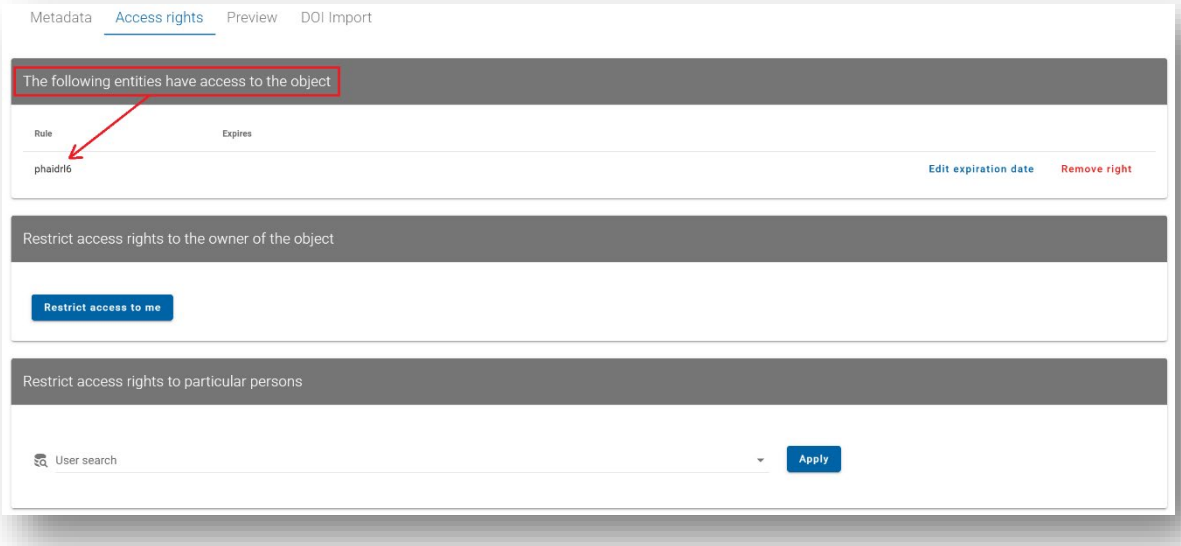

Figure 40: Metadata Editor, *Access rights* tab. Highlighted in red: the note regarding access restrictions and the account with which the digital object can be accessed.

Incorrect or no longer required entries can be removed here at any time by clicking on ***Remove right*** (see Figure 41).

Figure 41: Metadata Editor, *Access rights* tab (detail). Highlighted in red: the *'Remove Right'* button.

If a restriction is to apply only for a limited period, an expiry date can be set: ***Edit expiration date*** (see Figures 42, 43 and 44). Once this date has been reached, access is automatically restored.

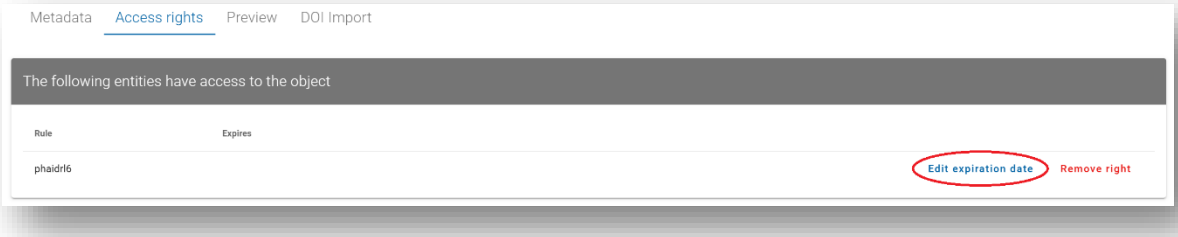

Figure 42: Metadata Editor, *Access rights* tab (detail). Marked in red: the *Edit expiration date* button.

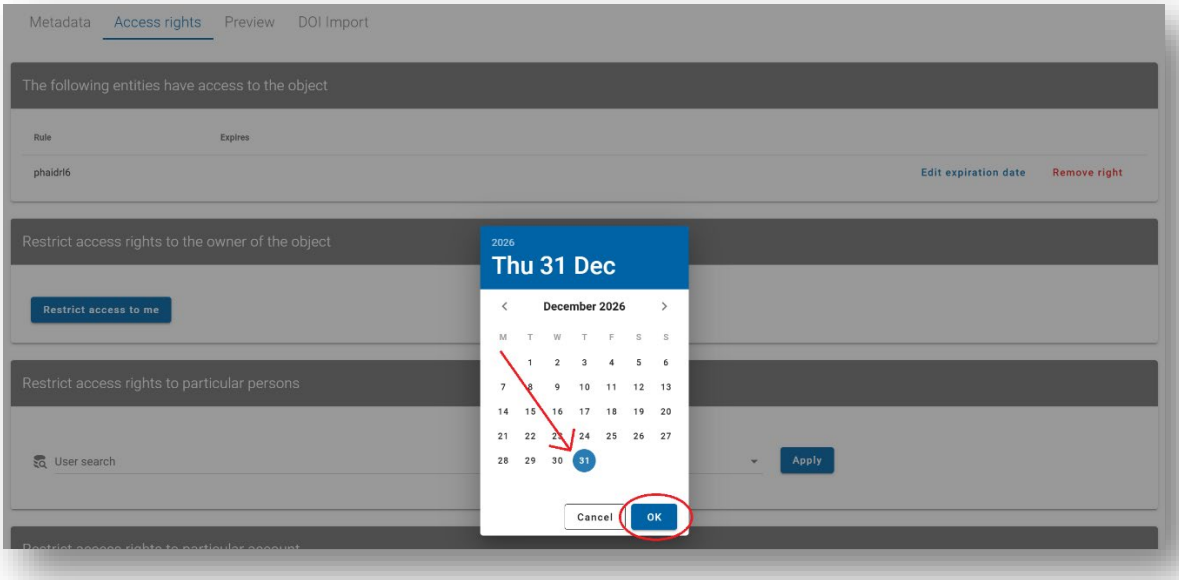

Figure 43: Metadata Editor, *Access rights* tab (detail). To set a time limit on access restrictions, an expiration date can be selected in the calendar window and confirmed by clicking *OK*.

Figure 44: Metadata Editor, *Access rights* tab (detail). In this example, the access restriction ends automatically on December 31st, 2026.

PHAIDRA offers the following options for access management:

- Restrict access rights to the owner of the object
  Only the person who uploads the object can view and download the file.

- Restrict access rights to particular persons
  Specific individuals who are to be granted access can be selected and confirmed via the search bar.

- Restrict access rights to particular account
  Here, usernames (individual u:accounts or service email addresses) can be entered directly. For personal accounts, this has the same effect as the user search, but is a different entry point.

- Restrict access rights to particular eduPersonAffiliation values
  This option grants access to broad groups of people at the University of Vienna (see Figure 45). *eduPersonAffiliation* is a technical attribute from identity and access management that describes the relationship between a user account and the University of Vienna. The following categories are used in PHAIDRA:

  - *member*: all members of the University of Vienna
  - *staff*: staff members
  - *student*: students
  - *faculty*: teaching staff

  A person may have multiple eduPersonAffiliations simultaneously. For example, anyone with the affiliation *'student'*, *'staff'* or *'faculty'* is automatically also *a 'member'*.

  Important: Guest accounts (e.g. external partners without formal affiliation to the University of Vienna) **do not have an eduPersonAffiliation with the University of Vienna** and therefore cannot be included via this option.

Figure 45: Metadata Editor, *Access rights* tab (detail). In this section, access restrictions can be assigned at the eduPersonAffiliation level.

- Restrict access rights to organisational units/subunits
  Here, access can be restricted to specific institutional organisational units (e.g. the entire university, individual institutes, faculties or departments). The selection is made via a drop-down menu or the hierarchical view (see Figure 46).

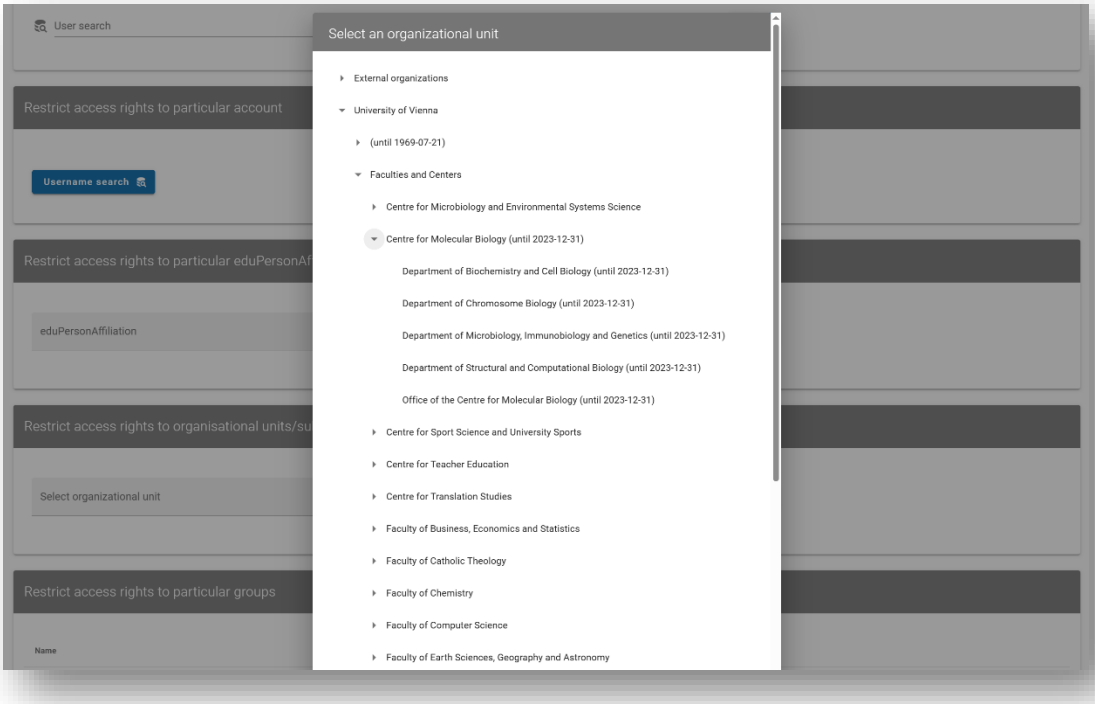

Figure 46: Metadata Editor, *Access rights* tab. In the foreground, a hierarchical view of the University of Vienna's organisational units is shown.

- Restrict access rights to particular groups
  If groups have been set up in PHAIDRA (e.g. for project teams), these can be selected (see Figure 47). Access can then be granted to all members of the group. Further information can be found in Chapter 11 Groups.

Figure 47: Metadata Editor, *Access rights* tab (detail). In this section, access can be restricted to user groups you have created yourself.

6.2.3. Preview

The *Preview* tab of the editor displays a preview of the metadata entered (see Figure 48). This step serves as a check before the object is finally created.

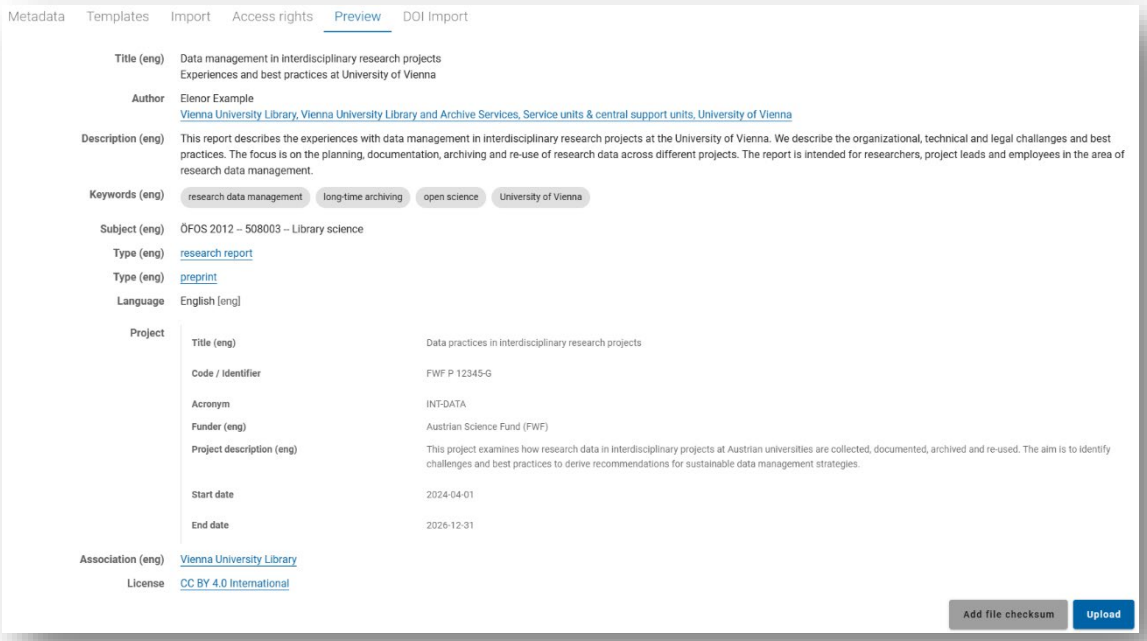

Figure 48: Metadata editor, *Preview* tab.

What to check here: Have all mandatory fields been filled in correctly? Are the title, description and keywords correct? Are the roles (persons/institutions) complete? Has the correct organisational unit been entered? Is the selected license correct? If everything is correct: click *Upload* to create the object permanently.

Only after this step, the object is stored in PHAIDRA, assigned a PHAIDRA URL and a handle, made visible to the public (or in accordance with access permissions), and displayed in the *My Objects* tab of the navigation bar.

6.2.4. DOI Import

The *DOI Import* function allows metadata to be imported into the PHAIDRA metadata editor using an existing DOI from DataCite and Crossref. This can be particularly helpful for objects that have already been published, to avoid duplicate entries, e.g. for author details, titles or keywords. The function is currently in the testing and further development phase.

Workflow

1) In the metadata editor, select the *DOI Import* tab (see Figure 49).

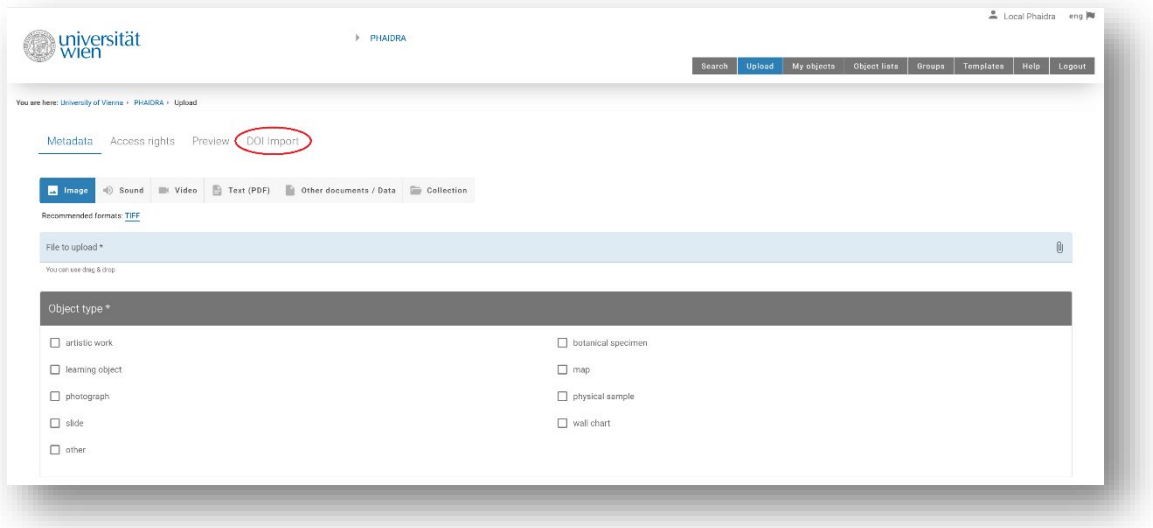

Figure 49: Metadata editor (detail). Marked in red: the *DOI Import* tab.

2) Enter the object's existing DOI (see Figure 50).

3) Click on *Import* (see Figure 50) → Available metadata from DataCite or Crossref is displayed.

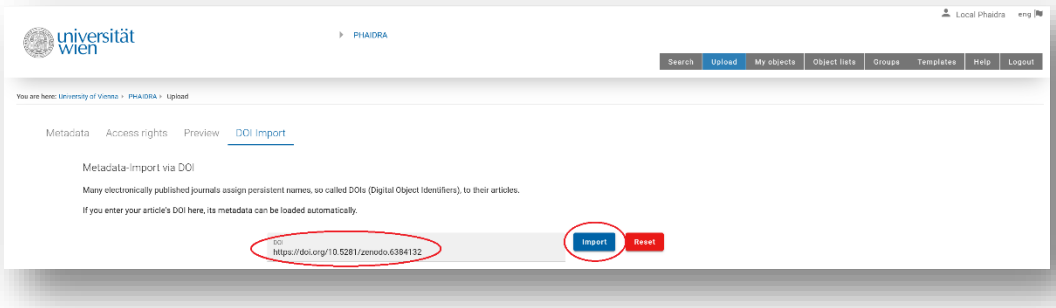

Figure 50: Metadata Editor, *DOI Import* tab. Marked in red: the DOI input field and the button to import the metadata.

4) Click on ***Load Form*** (see Figure 51) → The selected metadata is transferred to the PHAIDRA metadata editor (see Figure 52).

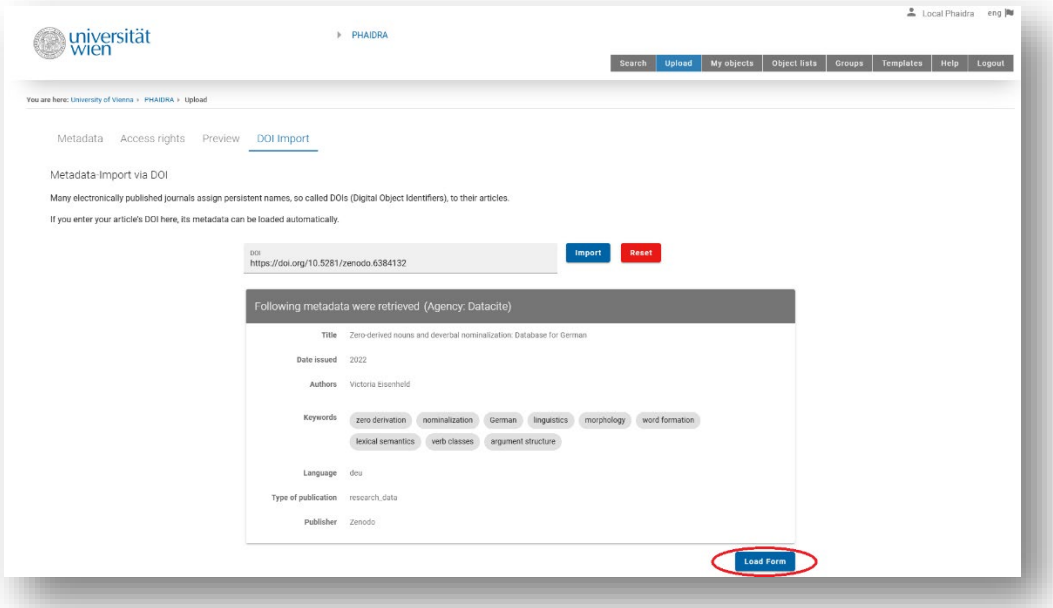

Figure 51: Metadata Editor, *DOI Import* tab. Highlighted in red: the button to import metadata obtained from DataCite into the Metadata Editor.

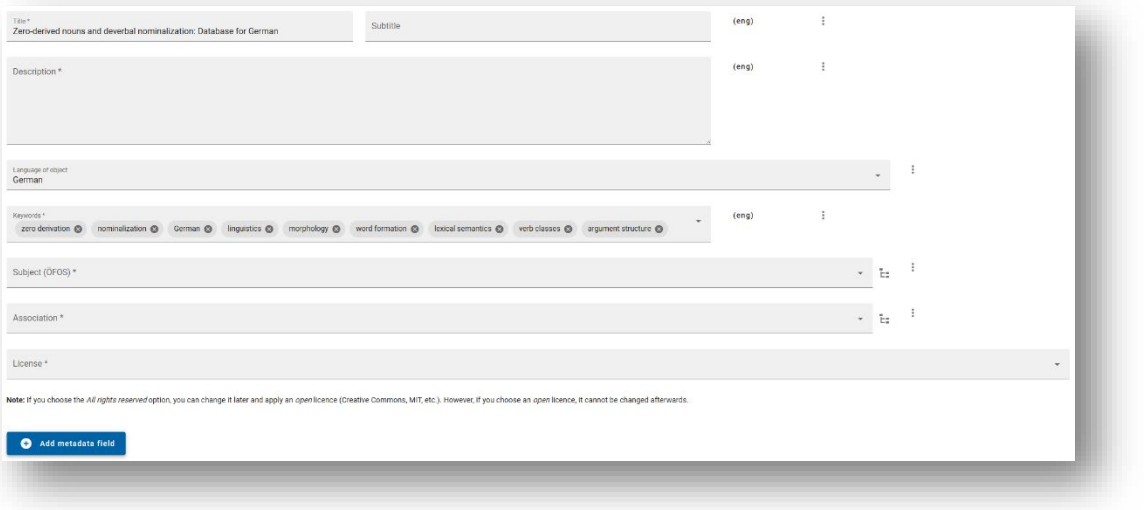

Figure 52: Metadata editor, detail. The metadata imported from DataCite has been automatically entered into the *Title*, *Keywords* and *Role* fields.

5) Check the metadata in the editor, add to or correct it if necessary.

6) Add file, set access permissions (if necessary), check the preview and upload the object.

Note: The imported metadata should always be checked carefully. Not all fields are transferred completely or correctly, and project-specific or institutional details usually need to be added manually.

6.3. Working with templates

Metadata templates are a great help when multiple objects with the same or very similar metadata are to be archived. The advantages of templates are:

- Time saving
  Recurring metadata does not need to be re-entered every time.
- Consistency
  All objects in a project or collection are given the same metadata structure and the same standardised details.
- Error reduction
  Less repetition → fewer typing errors, less missing information.

6.3.1. Create a template

Templates are created directly in the metadata editor.

Workflow

1) Log in to PHAIDRA.

2) Click on the *Upload* tab in the navigation bar.

3) Click on *Create new object*.

Important: DO NOT add a file! A template must not contain any files.

4) Fill in the metadata: enter all fields that are to be the same for multiple objects (e.g. *description*, *role*, *keyword (ÖFOS)*, *organisational unit*, *license*, project information). Fields that vary depending on the object (e.g. *title*, *keywords*) should be left blank.

5) Scroll down and – instead of *Upload* – select ***Save as new template*** (bottom left) (see Figure 53).

6) Assign a name to the template (see Figure 54).

7) Click *Save* (see Figure 54).

The template is now created and appears in the *Templates* tab in the navigation bar (see Figure 55).

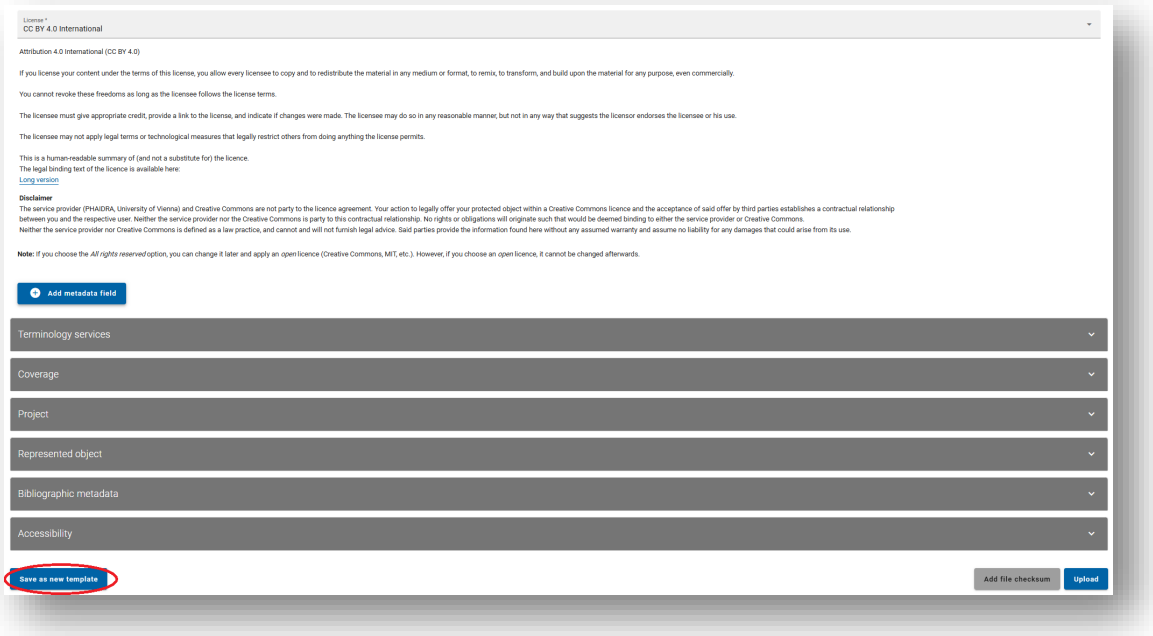

Figure 53: Metadata editor (detail). Marked in red: button to create a new template based on the entered metadata.

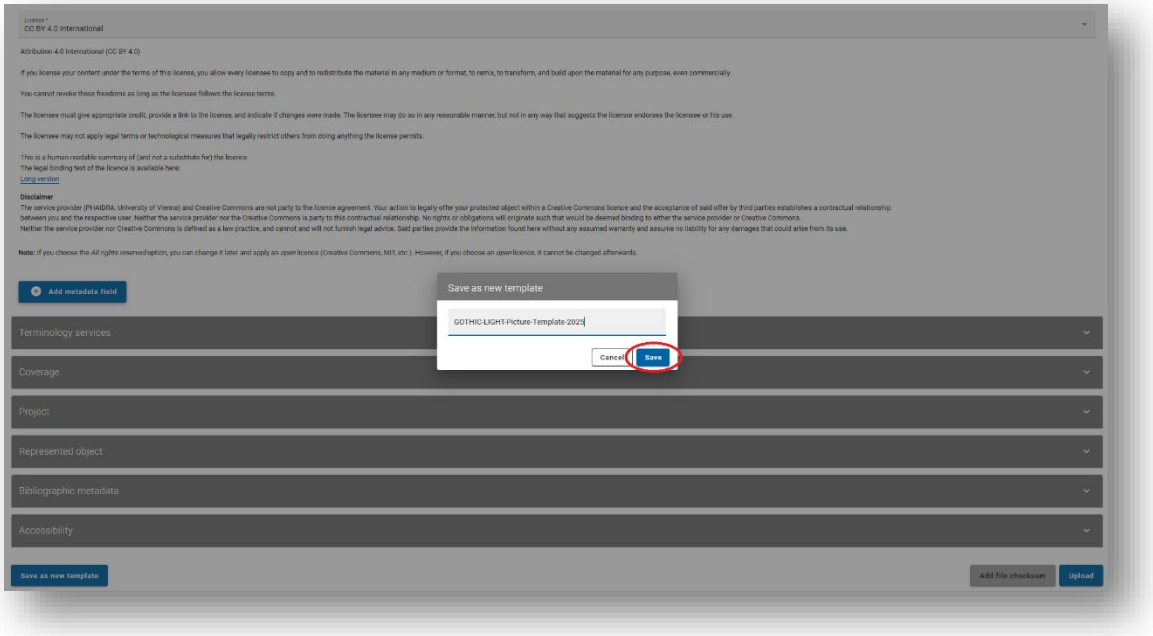

Figure 54: Metadata editor (detail). Marked in red: name of the new metadata template and button to save it.

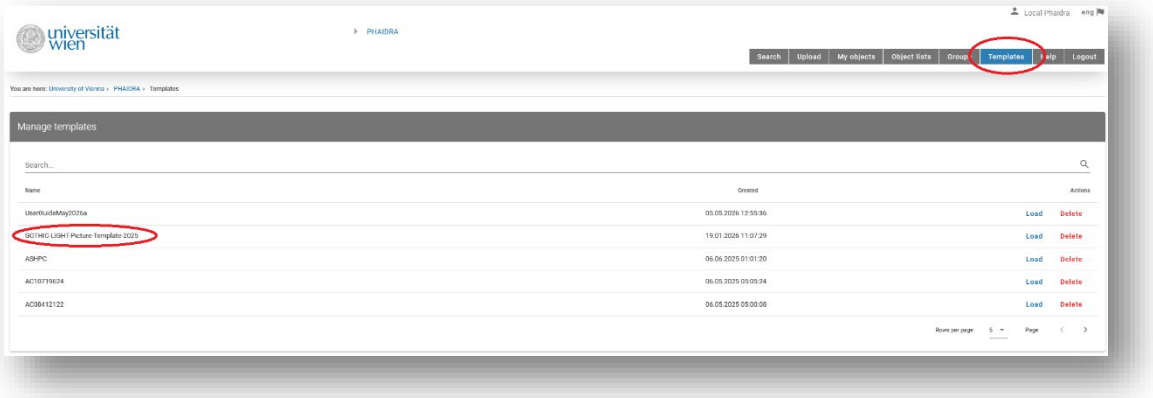

Figure 55: *Templates* tab. Highlighted in red: the *Templates* tab in the navigation bar and the newly created metadata template in the template overview.

6.3.2. Opening and using a template

There are two ways to load a template into the metadata editor:

Option 1: Via the Templates tab

1) Log in to PHAIDRA.

2) Click on the *Templates* tab in the navigation bar (see Figure 56).

3) Select a template → Click on ***Load*** (see Figure 56).

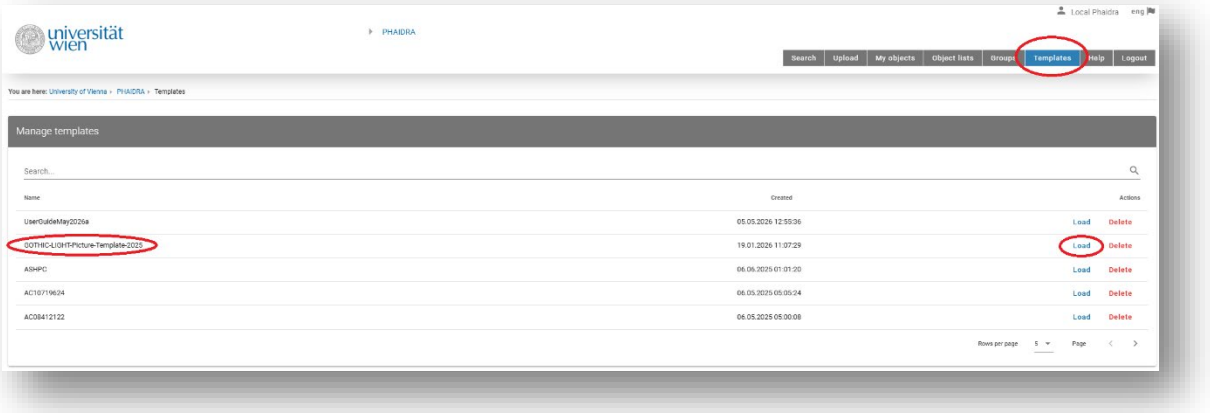

Figure 56: *Templates* tab. Highlighted in red: the *Templates* tab in the navigation bar, the newly created metadata template in the template overview, and the button to load it into the metadata editor.

Option 2: Via the Upload tab

1) Log in to PHAIDRA.

2) Click on the ***Upload*** tab in the navigation bar.

3) Click on ***Open Template*** (see Figure 57) → An overview of all your own templates appears.

4) Select a template → Click on ***Load*** (see Figure 58).

The metadata editor then opens with all the template fields pre-filled.

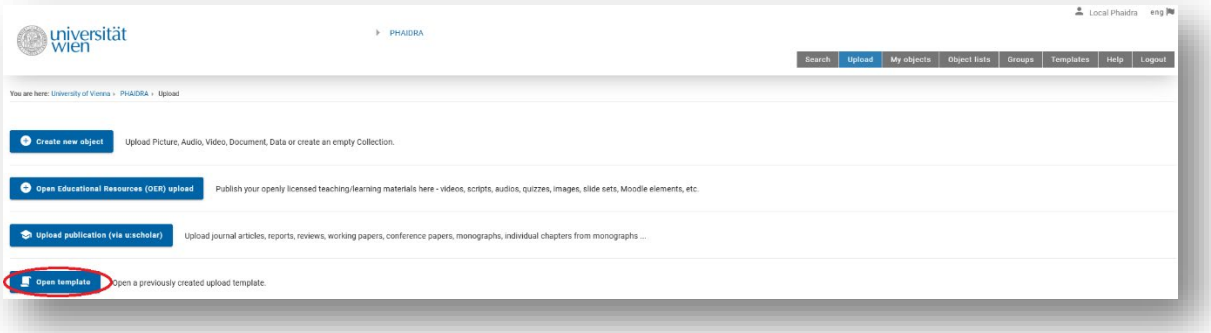

Figure 57: *Upload* tab. Marked in red: the button to open the overview of templates already created.

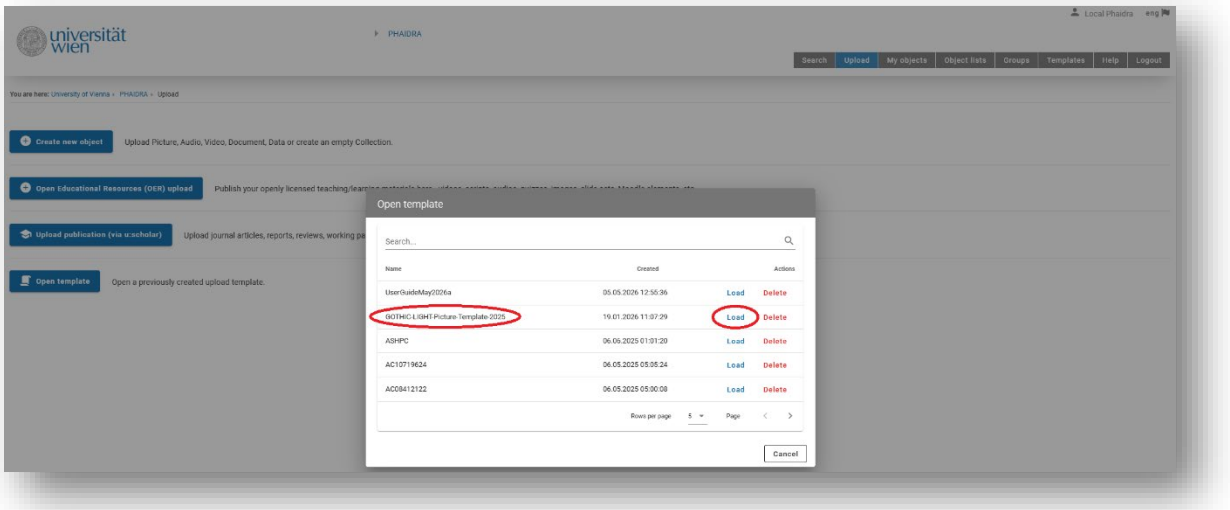

Figure 58: *Upload* tab, template overview. Marked in red: the selected template and the button to load it into the metadata editor.

The standard **upload process** now takes place:

1) Add **file**.

2) Add **metadata** specific to this particular object.

3) Assign **access permissions** (if necessary).

4) Check **the preview**.

5) Click ***Upload***.

The object is now stored in PHAIDRA, published in accordance with the access settings, and appears in the *My Objects* tab in the navigation bar.

7. Open Educational Resources (OER) in PHAIDRA

According to UNESCO, OER are "teaching, learning and research resources in any medium, digital or otherwise, that are in the public domain or have been published under an open license that allows free access, use, adaptation and redistribution by others with no or minimal restrictions." (Paris Declaration on OER, 2012)

The University of Vienna expressly recommends that its members **create, publish and use teaching and learning materials as OER**, as well as **re-use existing OER** – both from within the university environment and from external providers.

PHAIDRA supports this approach through its **own upload workflow for OER**, which ensures that educational resources are openly licensed, correctly described and made visible nationally.

7.1. Uploading OER to PHAIDRA

OER are also uploaded via the metadata editor, but the process differs from the standard upload in a number of key respects. Any steps and fields not described in detail below follow the standard upload procedure (see Chapter 6: Creating Objects).

Workflow

1) *Login* to PHAIDRA.
2) Click on the *Upload* tab in the navigation bar.
3) Click on *Upload Open Educational Resources (OER)* (see Figure 59) → The metadata editor opens (see Figure 60).
4) Select *the* *Learning Object Type* (see below).
5) Add *File to upload*.
6) Fill in the *Metadata* fields and (optionally) specify the target *Audience* (see below).
7) Select a *License* option (see below).
8) Check the metadata *Preview*.
9) Click on *Upload*.

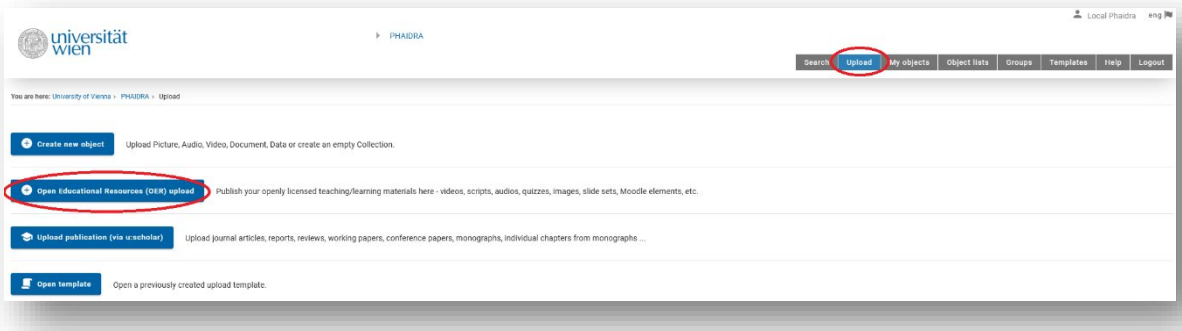

Figure 59: *Upload* tab. Marked in red: *Upload* tab in the navigation bar and button to upload OERs.

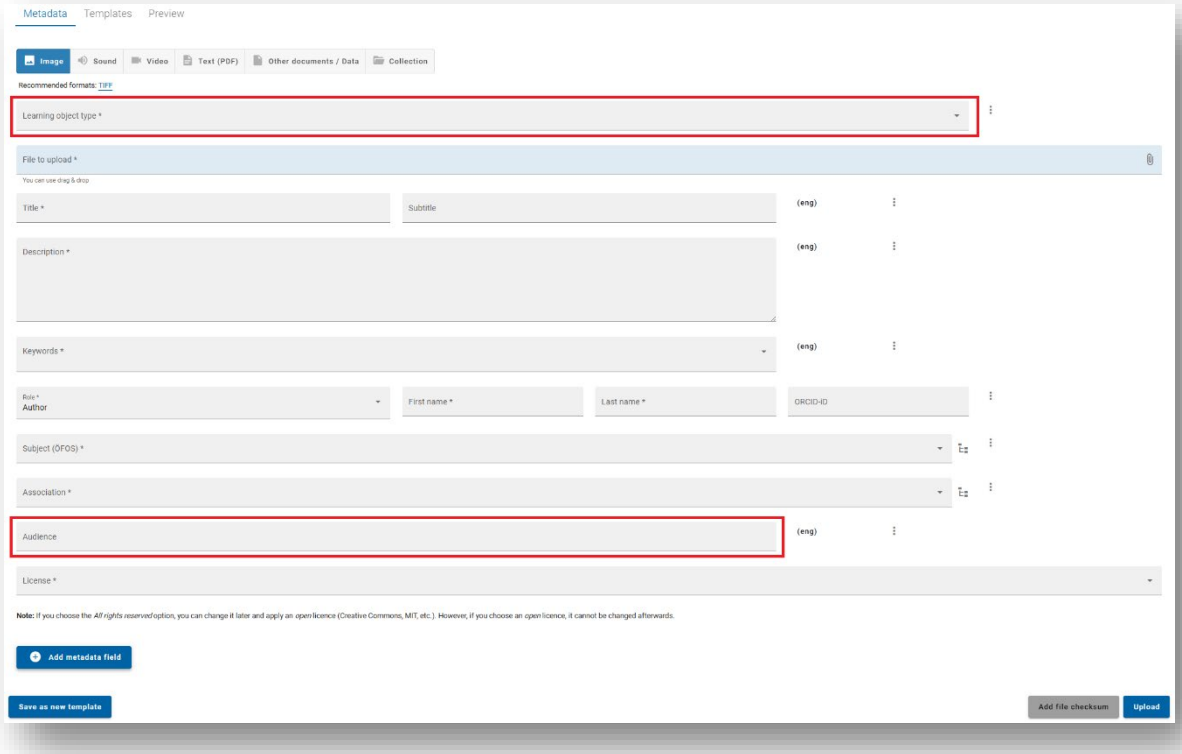

Figure 60: Metadata editor, specially adapted for OERs. Marked in red: the metadata fields *'Learning object type'* and *'Audience'*.

Learning object type*

When uploading an OER, you must specify a *Learning object type*. This metadata describes the **educational nature** of the resource. The options available are: *assessment, audio recording, case study, course, data, diagram, drill and practice, experiment, game, image, lesson plan, map, other, presentation, questionnaire, reference work, script, sheet music, simulation, software application, text, textbook, video, web page, web portal, worksheet.*

Audience

The target audience for the resource may be specified optionally. This field supports pedagogical classification but is not mandatory. It is a free-text field. Possible entries include, for example: *undergraduate students*, *postgraduate students*, *teacher training students*, *advanced learners* or *teachers*.

License*

As these are OERs, only open Creative Commons licenses are available in the license field:

- *CC BY 4.0 International*
- *CC BY-SA 4.0 International*
- *CC BY-NC 4.0 International*
- *CC BY-NC-SA 4.0 International*

Other license options (e.g. *All rights reserved*) are not available here.

Note: The choice of license determines how the OER may be reused, adapted and distributed. Legal issues should therefore be clarified before uploading. If necessary, please feel free to contact the RDM Legal Helpdesk (rdm@univie.ac.at).

Access restrictions (not available)

The *Access Permissions* tab is not available when uploading OER. OER should be openly accessible, and therefore, access restrictions would contradict the OER principle. All OER in PHAIDRA are therefore publicly accessible (preview and download). The metadata is – as with all PHAIDRA objects – publicly visible.

7.2. Visibility in the OER directory

All OERs published in PHAIDRA are also made visible in the OERHub – the national search engine for OERs from the Austrian higher education sector. This increases the findability of teaching and learning materials, facilitates reuse by other higher education institutions, and contributes to Open Education at institutional and national level.

7.3. Support and advice

A dedicated support team is available to answer any questions regarding OER at the University of Vienna – please feel free to contact openeducation@univie.ac.at if you have any queries regarding suitable licenses, educational adaptation, OER strategies, visibility or the reuse of OER.

8. Editing objects after upload

Digital objects in PHAIDRA can also be **modified or expanded after upload**. This includes changes to metadata, adding the object to collections, or creating links to other objects. Access restrictions can also be assigned, modified or removed. All editing functions are available **exclusively** to **the owners of an object**.

Workflow

1) **Log in** to PHAIDRA.

2) Open the relevant object in the **detailed view**.

3) In the information and function area (on the right), scroll down to the ***Edit*** box.

Depending on the object type, various editing options are available there (see Figure 61):

- *Edit metadata*,
- *Add to a collection*,
- *Upload related object*,
- *Access rights*,
- *Links*.

The following sub-sections describe these functions in detail.

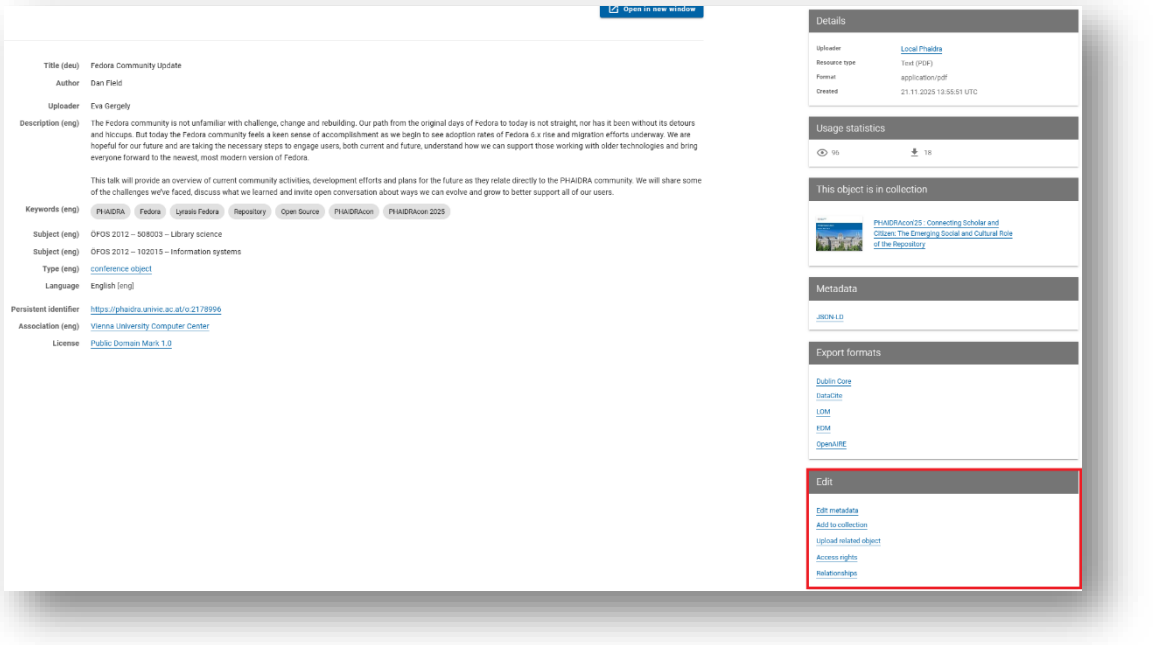

Figure 61: Detailed view of object o:2178996 (detail). Marked in red: the *Edit* box (visible only to the object's owner after logging in).

8.1. Edit metadata

After uploading, the metadata for your own objects can be **updated, corrected or expanded**. This is particularly useful if information changes, new findings become available or additional details need to be added. Editing affects only the **metadata**, not the file itself.

Typical use cases for metadata editing

- Adding a more detailed description, further roles or bibliographic details if the object has become part of a publication;
- Adding persistent identifiers (e.g. DOIs) that were assigned retrospectively or were not yet known at the time of upload;
- Adding multilingual metadata;
- Refining the classification using additional ÖFOS terms;
- Adding citations from newly published articles;
- Updating links;
- Correcting typos; etc.

Workflow

1) Log in to PHAIDRA.

2) Open the relevant object in the detailed view.

3) In the information and function area (on the right), scroll down to the *Edit* box.

4) Click on *Edit metadata* (see Figure 62) → The metadata editor opens, with the same structure as in the original upload (see Figure 63).

5) Make the necessary edits.

6) Click *Save* at the bottom of the editor → The detailed view is updated; the changes are immediately visible.

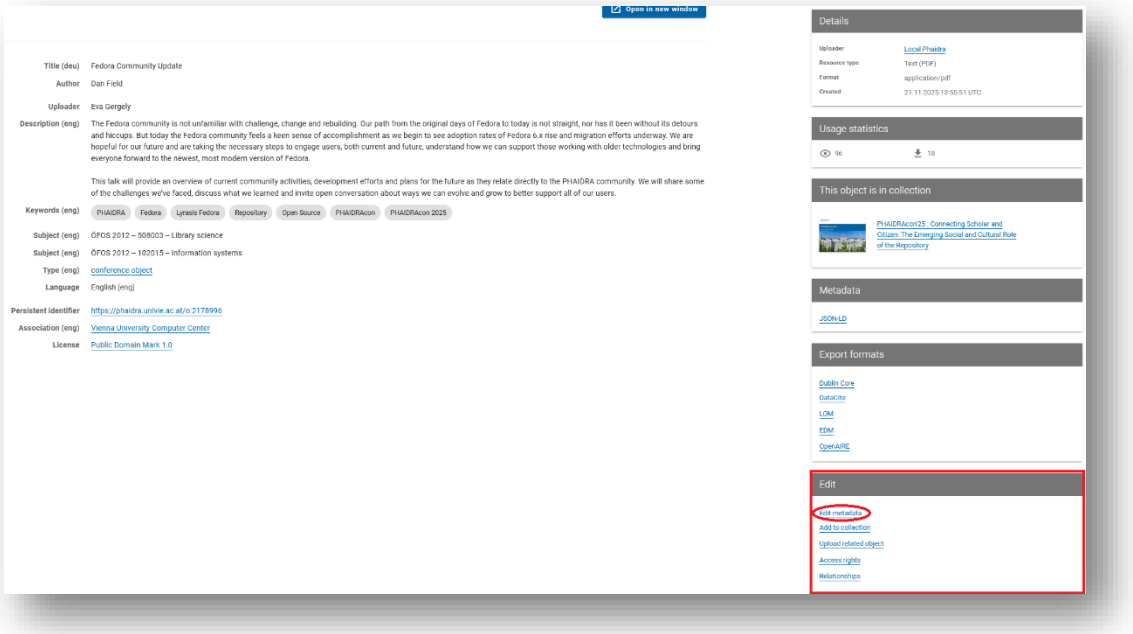

Figure 62: Detailed view of object o:2178996 (detail). Highlighted in red: the *'Edit'* box and the button for editing the metadata (visible only to the object's owner after logging in).

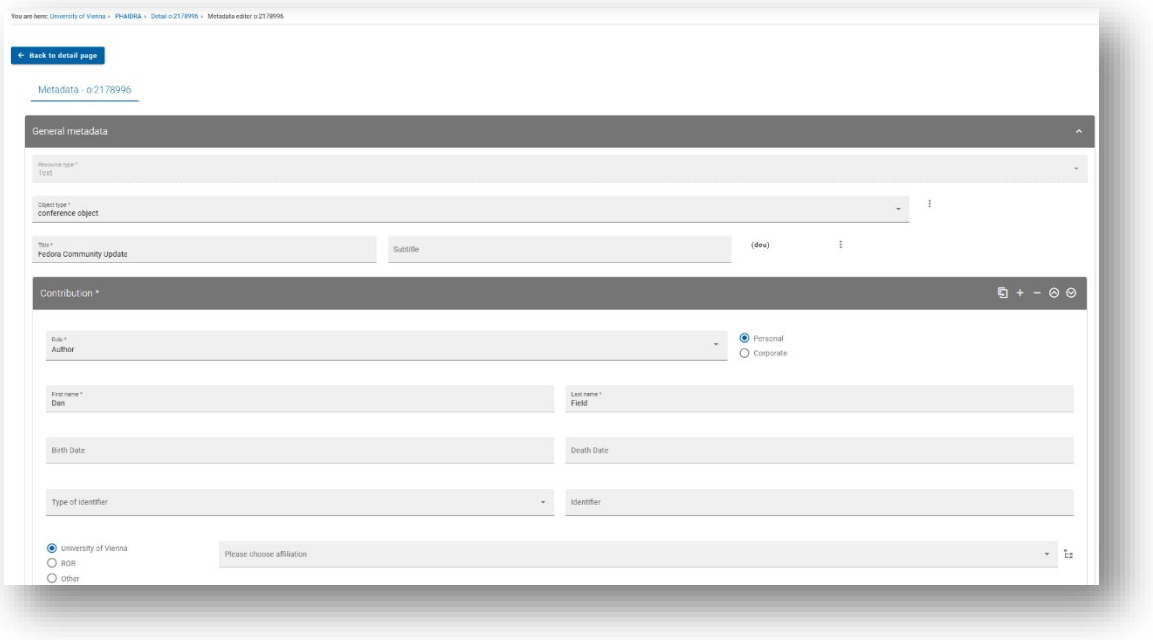

Figure 63: Metadata editor (detail), opened for subsequent metadata editing of object o:2178996 (visible only to the object owner after logging in).

Which metadata can be edited?

In principle, **all content-related metadata fields** can be changed: *title* and *subtitle*, *description*, *keywords*, *role*, *ÖFOS classification*, *organisational unit* and other (optional) fields.

The information in these metadata fields can be **corrected or supplemented**, and the fields themselves can be **duplicated or expanded**. All changes take effect immediately after saving.

Which fields cannot be edited?

Certain metadata **cannot be changed retrospectively for legal or technical reasons**:

Resource type (technical object type)
The technical object type (*image*, *audio*, *video*, *PDF document*, *other documents/data*, *collection*) is fixed after upload. The corresponding field is greyed out in the editor.

License
Licenses generally cannot be changed after upload. There is only one exception: switching from *All Rights Reserved* to an open license or the *Public Domain Mark* is permitted (provided the legal situation allows it). However, it is not possible to switch from an open license to *All Rights Reserved* or to switch between different licenses. This is to achieve legal certainty for users and clear conditions for reuse.

Note: Changes to metadata **do not** create **a new version of the object**. Versioning only occurs when a new file is uploaded (see Chapter 8 Editing objects retrospectively → 8.3.).

Adding a DOI to the metadata retrospectively

If a DOI has been assigned to an object after upload, it must be entered **manually** into the object's metadata.

Workflow

1) **Log in** to PHAIDRA.

2) Open the relevant object in the **detailed view**.

3) In the information and function area (on the right), scroll down to the ***Edit*** box.

4) Click on ***Edit metadata*** → The metadata editor opens (see also Figures 62 and 63).

5) In the metadata editor, click on ***+ Add metadata field*** (see Figure 64).

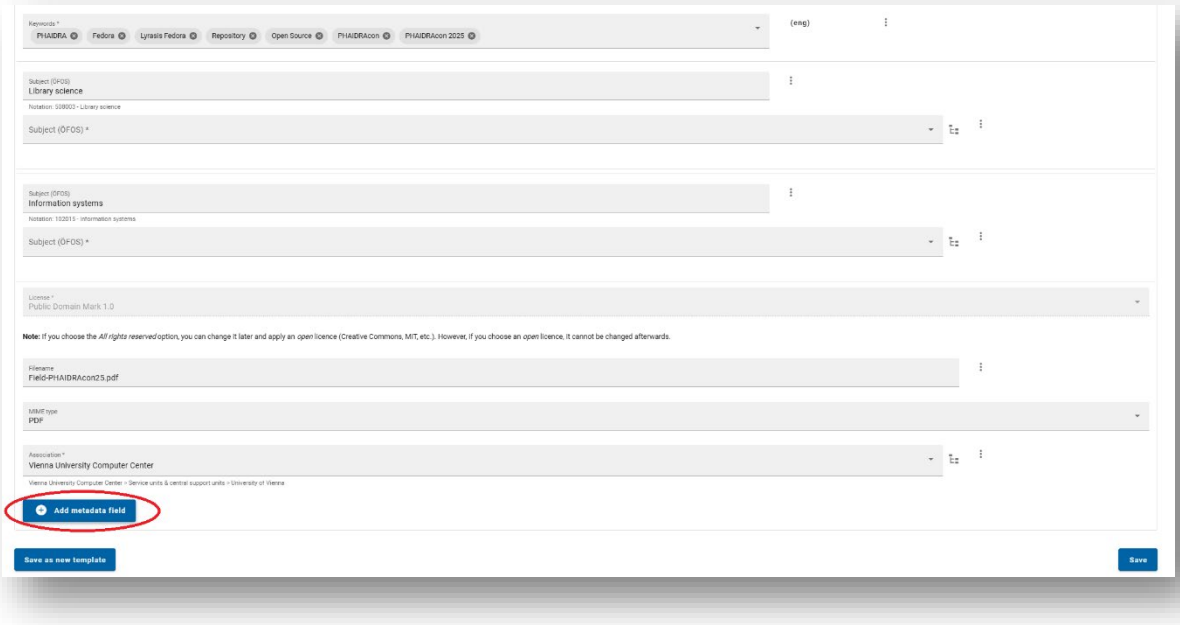

Figure 64: Subsequent metadata editing of object o:2178996. Marked in red: the button to add a metadata field.

6) Select the ***'Alternative Identifier'*** field from the list and add it (see Figure 65).

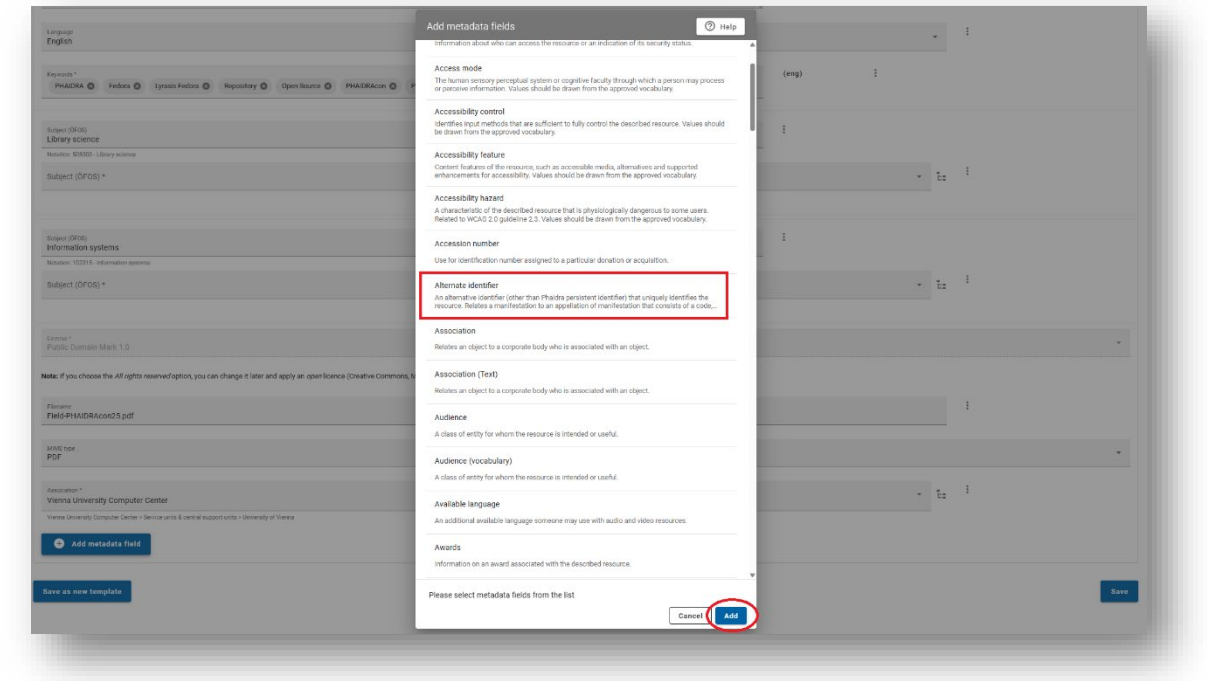

Figure 65: Subsequent metadata editing of object o:2178996. Highlighted in red: the *'Alternative Identifier'* metadata field and the button to add this field.

7) In the ***'Identifier Type'*** field, select the ***'DOI'*** option (this is usually the default option).

8) Enter the DOI in the ***Identifier*** field (see Figure 66).

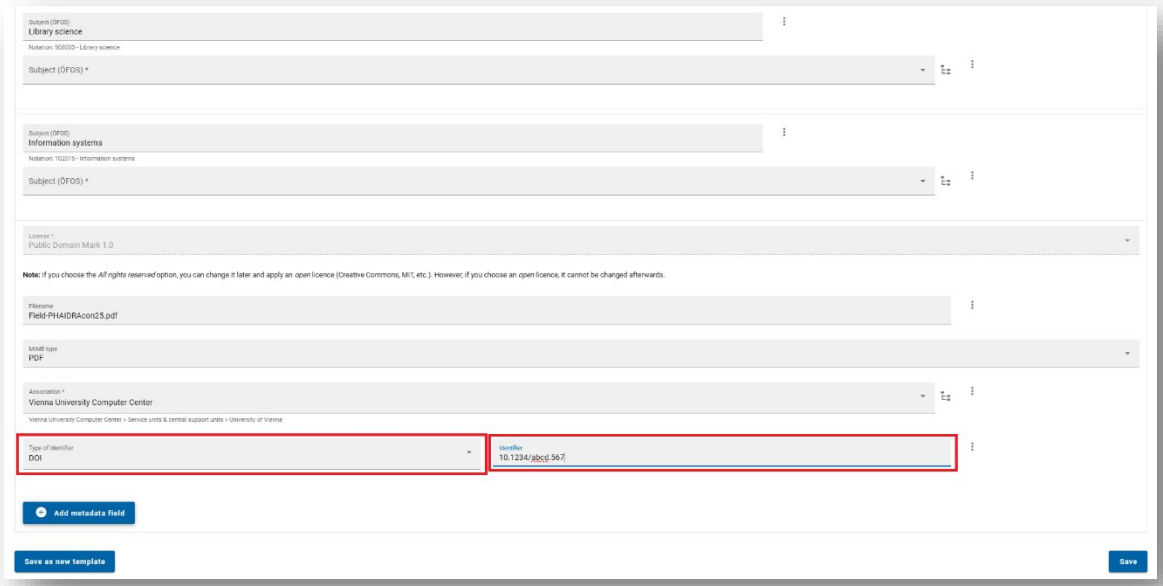

Figure 66: Subsequent metadata editing of object o:2178996. Marked in red: the metadata fields *'Identifier type'* and *'Identifier'*, into which an existing DOI can be entered.

9) Click ***Save***.

After saving, the DOI is stored in the object's metadata and automatically displayed in the *Other links and identifiers* section (see Figure 67).

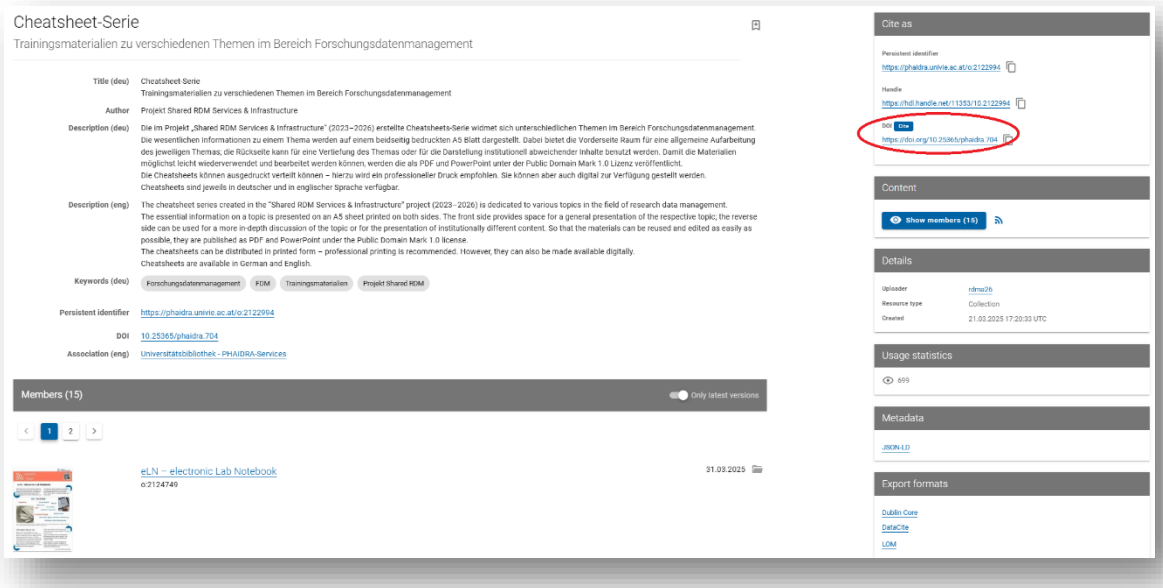

Figure 67: Detailed view of Collection o:2122994 (excerpt). Marked in red: the DOI in the *Cite as* box.

Further information on **the University of Vienna's DOI service** can be found in Chapter 5, Persistent Identifiers in PHAIDRA, as well as on the DOI service website.

8.2. Adding an object to a collection

Digital objects can be **assigned to one or more collections**. This can also be done via an object's editing area. As collections play a central structuring role in PHAIDRA, details on working with collections are covered in detail in Chapter 9: Collections.

The following section briefly describes how to add an object to a collection from the detailed view.

Workflow

1) **Log in** to PHAIDRA.

2) Open the relevant object in the **detailed view**.

3) In the information and function area (on the right), scroll down to the ***Edit*** box.

4) Click on ***'Add to Collection'*** (see Figure 68).

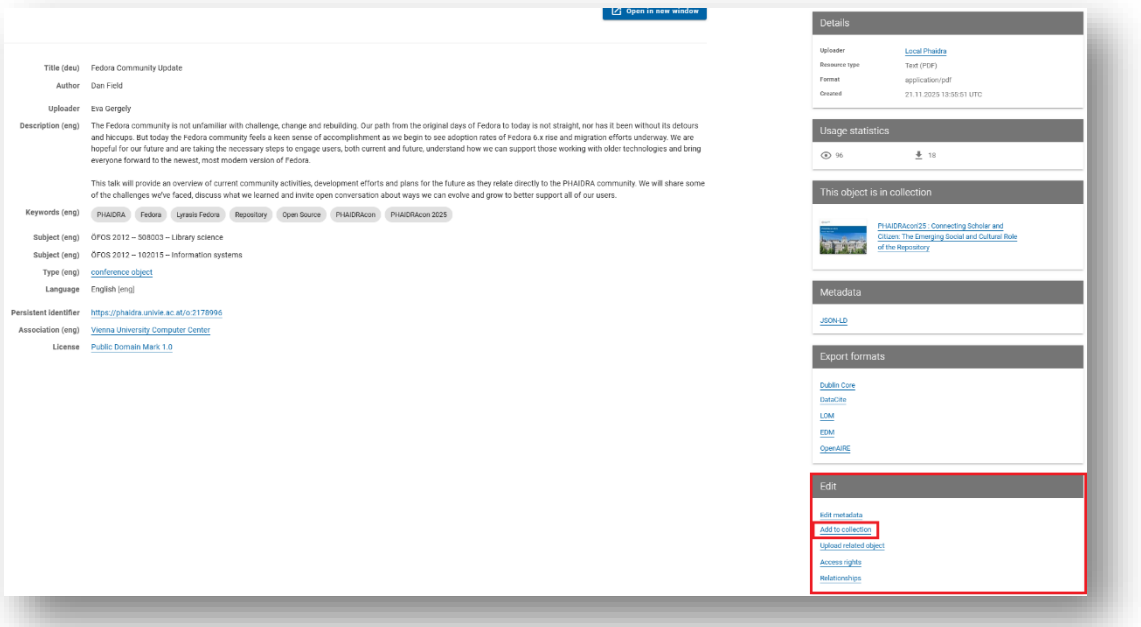

Figure 68: Detailed view of object o:2178996 (detail). Marked in red: the *Edit* box and the button to add the object to a collection (visible only to the object's owner after logging in).

5) Select **the target collection** (see Figure 69).

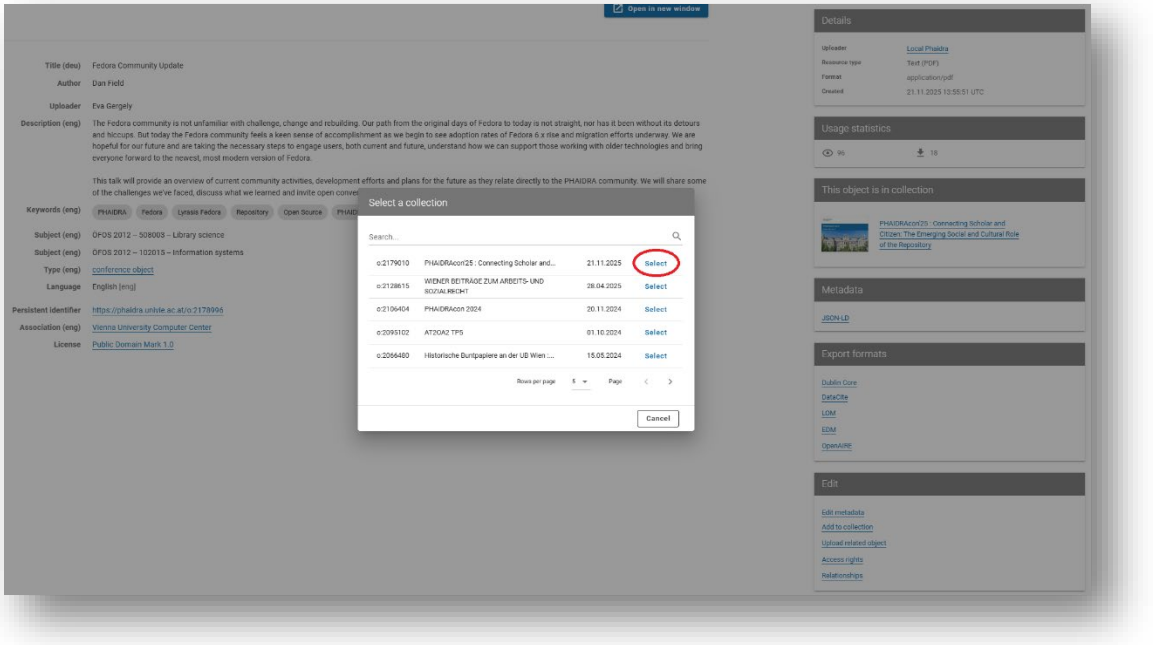

Figure 69: Possible collections to which object o:2178996 can be added. Marked in red: the selection button for a collection.

The object immediately becomes a member of the collection. In the object's detailed view, the box *'This object is in collection'* appears in the information and function area (on the right). This displays all the collections to which the object belongs (see Figure 70). Clicking on it takes you directly to the relevant collection.

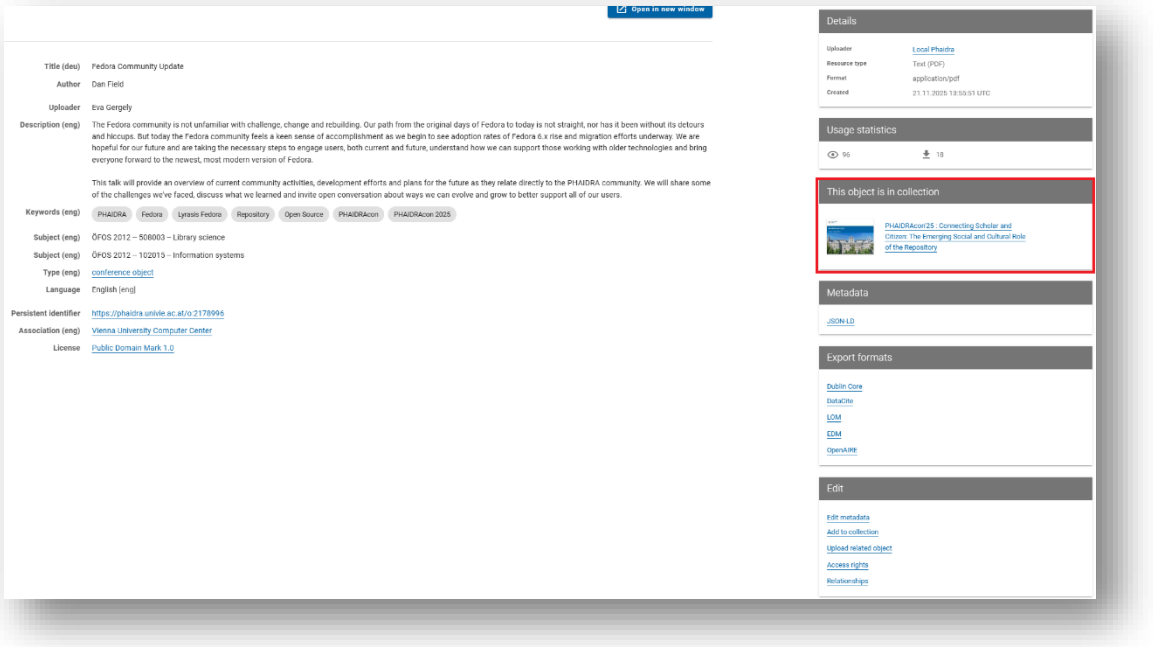

Figure 70: Detailed view of object o:2178996 (detail). Marked in red: the '*This object is in collection*' box, in which all collections to which the object is assigned are displayed.

8.3. Upload related object

PHAIDRA allows you to create a new, linked object based on an existing digital object. This is particularly useful when two digital objects are related in terms of content, technology or structure (e.g. the front and back of a digitised item, alternative formats, new versions, supplementary materials).

Available relationship types

- *… refers to …*
  Very general, flexible relationship; suitable for supplementary materials (e.g. a supplement, additional data, related documentation).

- *… is the reverse side of …*
  For digitised versions of physical objects with a front and a back (e.g. coins, postcards, manuscript pages).

- *… is a preview image of …*
  When a separate image is to serve as a thumbnail or representation.

- *… is a new version of …*
  For versioning (e.g. corrected records, updated documents, revised reports).

- *… is an alternative format of …*
  When the same content is available in a different technical format.

- *… is an alternative version of …*
  For objects with related content but not necessarily sequentially versioned (e.g. adapted versions, translations).

Workflow

1) Log in to PHAIDRA.

2) Open the relevant object in the detailed view.

3) In the information and function area (on the right), scroll down to the *Edit* box.

4) Click on *Upload related object* (see Figure 71) → A window appears showing the various relationship types that determine how the new object is linked to the existing one (see Figure 72).

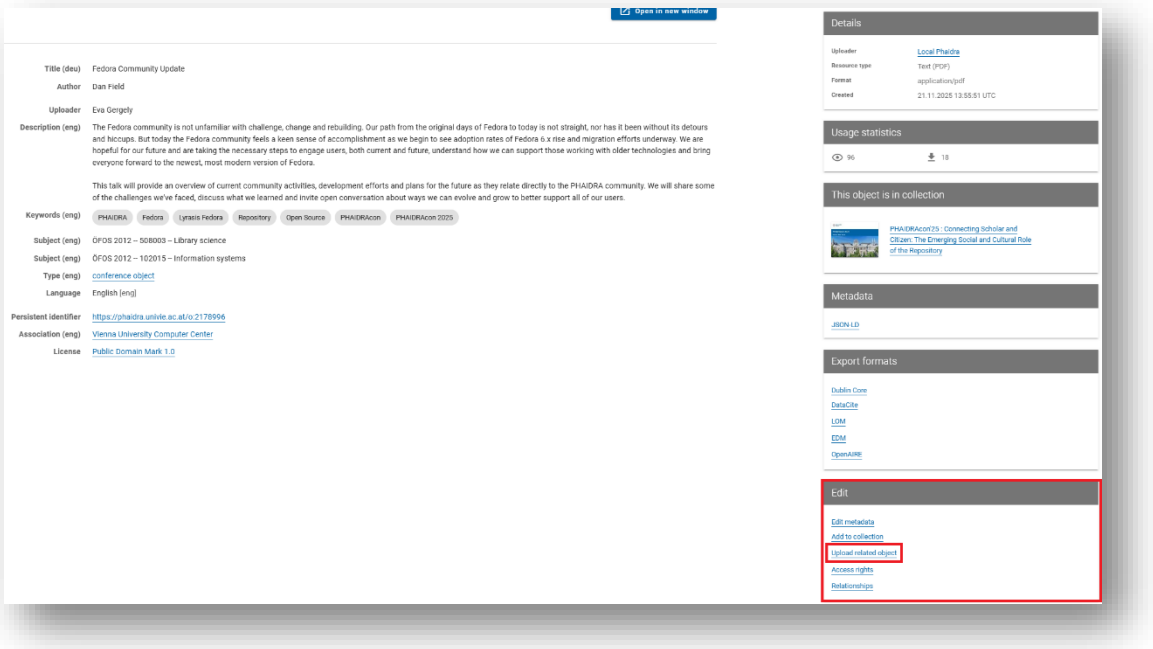

Figure 71: Detailed view of object o:2178996 (detail). Marked in red: the *Edit* box and the button to upload a related object (visible only to the object owner after logging in).

5) Select the relevant connection type (see Figure 72).

6) Click on *Next* (see Figure 72) → The metadata editor opens, as for a regular upload.

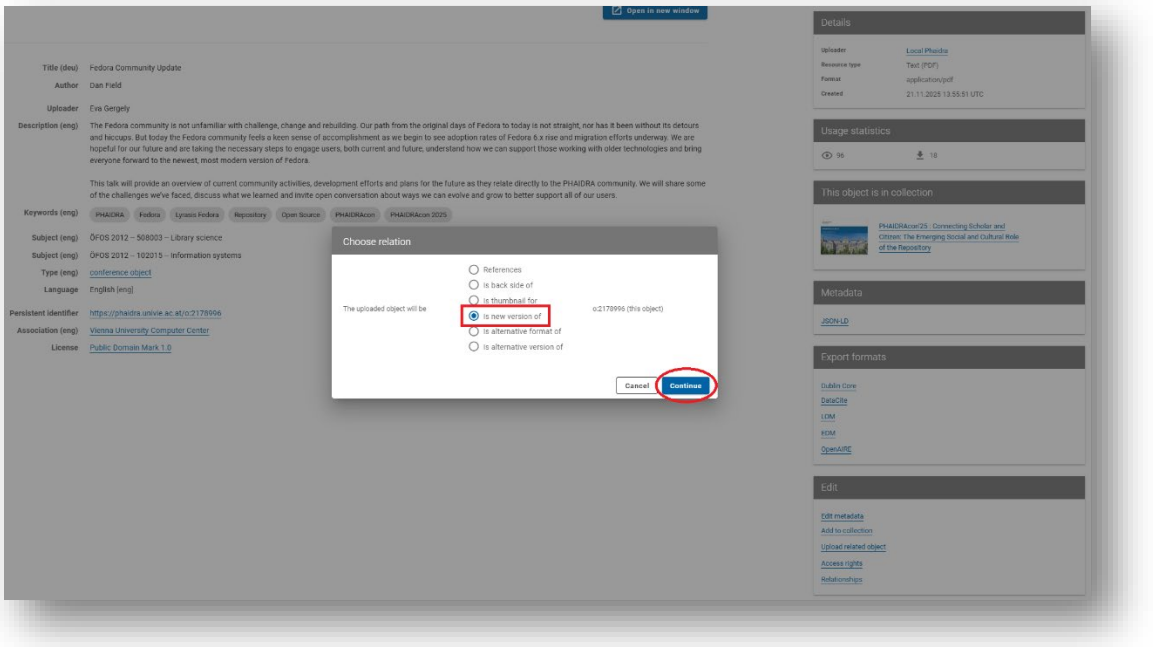

Figure 72: Possible connections that can be established between object o:2178996 and a new object. Marked in red: the selected connection *'is new version of …'* and the *'Continue'* button.

7) Add the **file** for the new object.

8) Fill in the **metadata fields**.

9) Assign **access permissions** (optional).

10) Check the **preview**.

11) Click ***Save***.

Once the upload is complete, the new object is automatically linked to the source object. The connection created appears in the detailed view of the digital object, in the information and functions area (on the right), in the relevant section, e.g. ***'Versions'*** or ***'Back of*** (the exact display format depends on the selected connection type) (see Figure 73). In addition, the newly created object also shows the relationship to the source object (bidirectional representation).

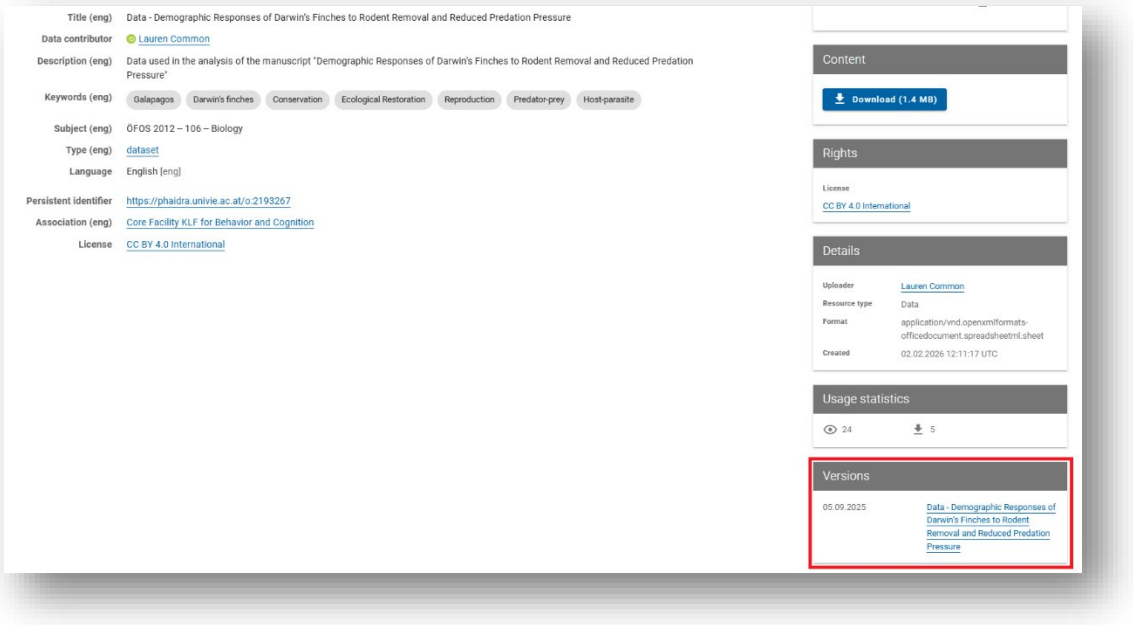

Figure 73: Detailed view of object o:2193267 (detail). Marked in red: the *Versions* box, in which all objects are displayed to which the object is linked in this connection.

8.4. Edit access rights

The access rights for an object can be **changed retrospectively** – provided you are the owner of the object. Changes affect only **access to the file** (preview and download), but not the metadata, which always remains publicly visible.

Using the **Access rights** function, you can assign new restrictions, adjust existing restrictions, set or change an expiry date, or remove restrictions entirely. All available options and their meanings are explained in detail in Chapter 6 Creating Objects → 6.2.2. There you will find, among other things: differences between access types, options for individuals, groups and organisational units, as well as how expiry dates work.

Workflow

1) **Log in** to PHAIDRA.

2) Open the relevant object in the **detailed view**.

3) In the information and function area (on the right), scroll down to the ***Edit*** box.

4) Click on ***Access rights*** (see Figure 74) → The metadata editor opens in the *Access rights* tab.

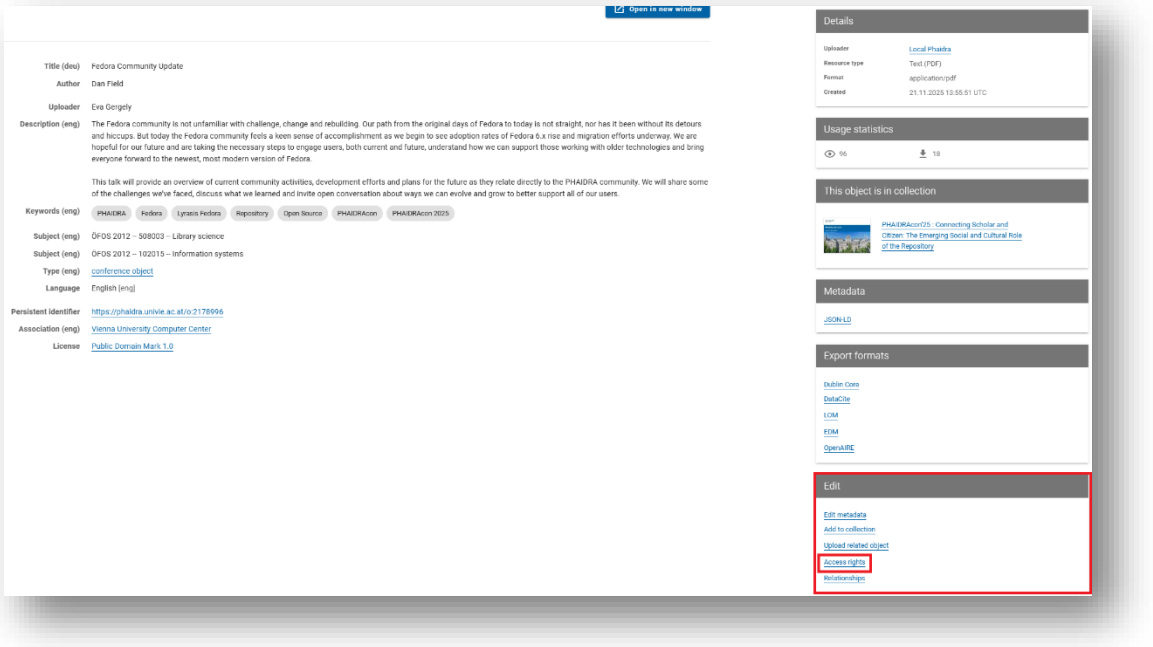

Figure 74: Detailed view of object o:2178996 (detail). Marked in red: the *Edit* box and the button to adjust access rights (visible only to the object owner after logging in).

5) Make the necessary changes.

6) Click *Save* → The changes take effect immediately.

8.5. Establishing links to other objects

Whilst the *Upload Related Object* function (see Chapter 8 Editing objects retrospectively → 8.3.) is used to create a new related object, the *Connections* function can be used to establish a **relationship with an existing object** in PHAIDRA. This allows to create content-related, technical or structural connections retrospectively – regardless of when the object was uploaded.

Available connection types

- *… refers to …*
  Very general, flexible relationship; suitable for supplementary materials (e.g. a supplement, additional data, related documentation).

- *… is the reverse side of …*
  For digitised versions of physical objects with a front and back (e.g. coins, postcards, manuscript pages).

- *… is a preview image of …*
  When a separate image is to serve as a thumbnail or representation.
- *… is a new / older version of …*
  For versioning (e.g. corrected records, updated documents, revised reports).
- *… is an alternative format of …*
  When the same content is available in a different technical format.
- *… is an alternative version of …*
  For objects with related content but not necessarily sequentially versioned (e.g. adapted versions, translations).
- *… has collection members …*
  For adding sub-collections to an existing collection (for structured collections).
- *… has members …*
  For adding other objects to an existing collection.
- *… has a track …*
  For adding subtitle files or transcripts.

Workflow

1) Log in to PHAIDRA.
2) Open the relevant object in the detailed view.
3) In the information and function area (on the right), scroll down to the *Edit* box.
4) Click on *Connections* (see Figure 75) → A window appears for entering the relation type, which determines how the object is linked to another existing object.

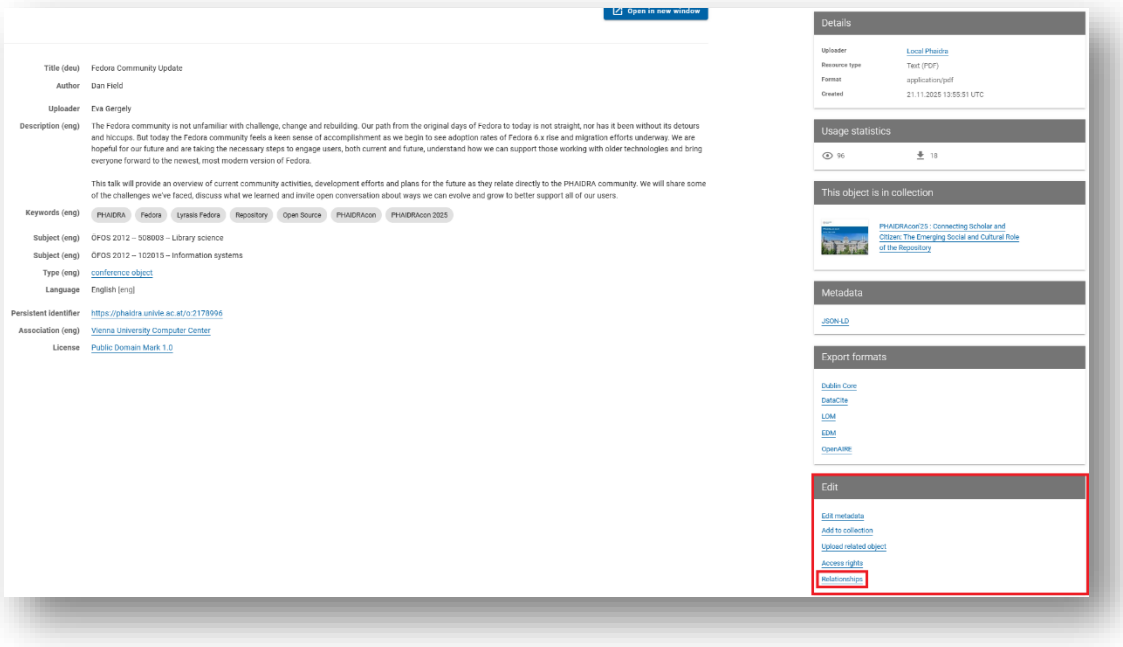

Figure 75: Detailed view of object o:2178996 (detail). Marked in red: the *Edit* box and the button for creating links to other objects (visible only to the object's owner after logging in).

5) Select the relevant **relation type** (see Figure 76).

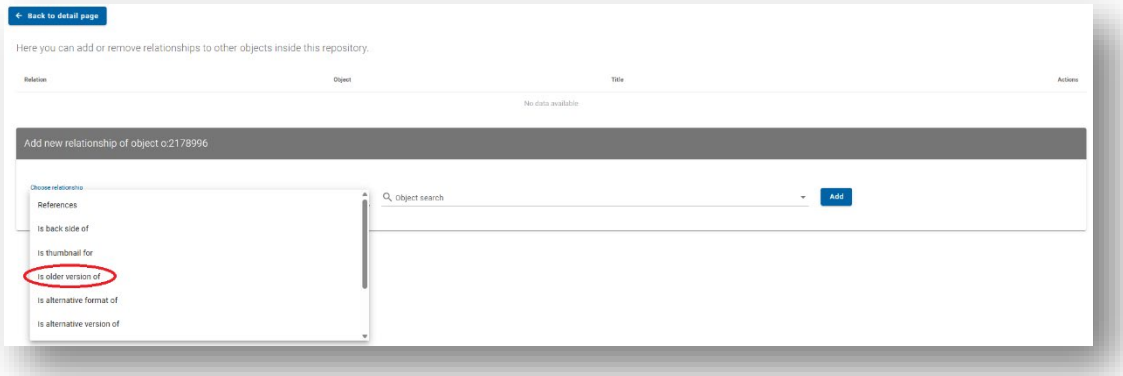

Figure 76: Possible links that can be established between object o:2178996 and another object. Marked in red: the selected link '*is an older version of*'

6) In the ***object search*** bar to the right, find and select the relevant object using free-text search and the object number (see Figure 77).

7) Click on ***Add*** (see Figure 77).

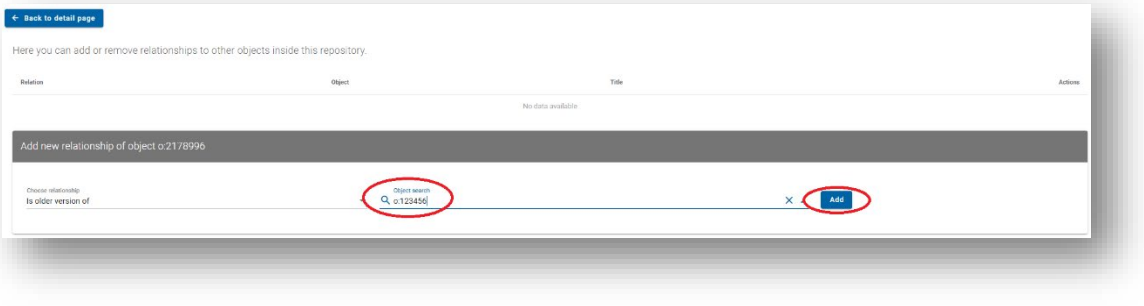

Figure 77: Objects to which a connection is to be created can be found via their object number. Marked in red: enter an object number in the search field (the figure shows a fictitious one) and click the *Add* button to confirm the connection.

Once the relationship has been successfully created, a green confirmation box (***Relationship successfully added***) appears briefly and the new relationship is displayed in an overview in the same window. It can be **deleted** at any time using the red **bin icon** (see Figure 78).

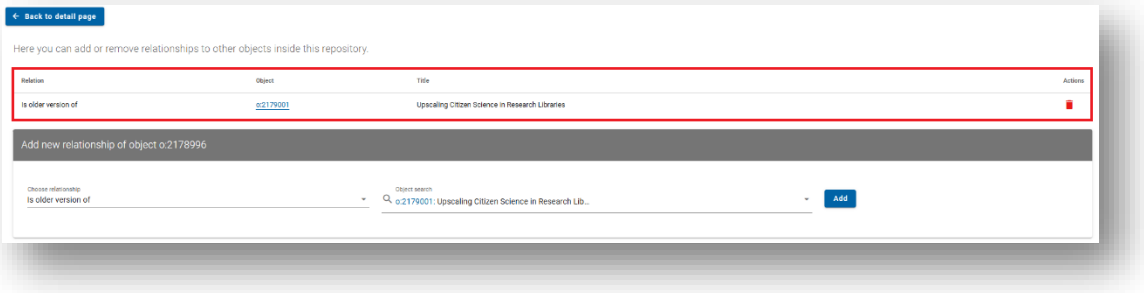

Figure 78: Overview of existing relationships for object o:2178996. Highlighted in red: Relationship to object o:2179001, including the bin icon, which can be used to remove the relationship if required.

After clicking on ***'Back to detailed view'***, the object page is reloaded. There, the created link now appears in the information and function area (on the right) in the relevant section, e.g. ***'Versions'*** or ***'Is reverse side of*** (the exact display format depends on the selected link type). In addition, the newly created object also shows the relationship to the source object (bidirectional representation).

9. Collections

Collections are **structural objects** in PHAIDRA that serve to organise digital objects in a meaningful context. Unlike archive folders or containers, collections do not contain files, but consist solely of metadata and links to other PHAIDRA objects (so-called **members** of the collection).

Collections are particularly suitable for:

- thematic groupings,
- presenting research results,
- structuring heterogeneous materials,
- teaching materials and course handouts,
- digital collections from projects or archives.

Note: Objects assigned to one or more collections remain completely independent. They retain their own metadata, identifiers, access rights and licenses.

9.1. Creating a collection

Like individual objects or archive folders, Collections are created **via the standard upload workflow** in PHAIDRA (see Chapter 6 Creating objects → 6.2.). The process therefore begins in exactly the same way as for any other object. The actual differences only become apparent in the metadata editor.

Workflow

1) **Log in** to PHAIDRA.
2) Select the *Upload* tab in the navigation menu.
3) Click on *Create new object* → The metadata editor opens.
4) Select the **object type** *Collection* (see also Figure 79).

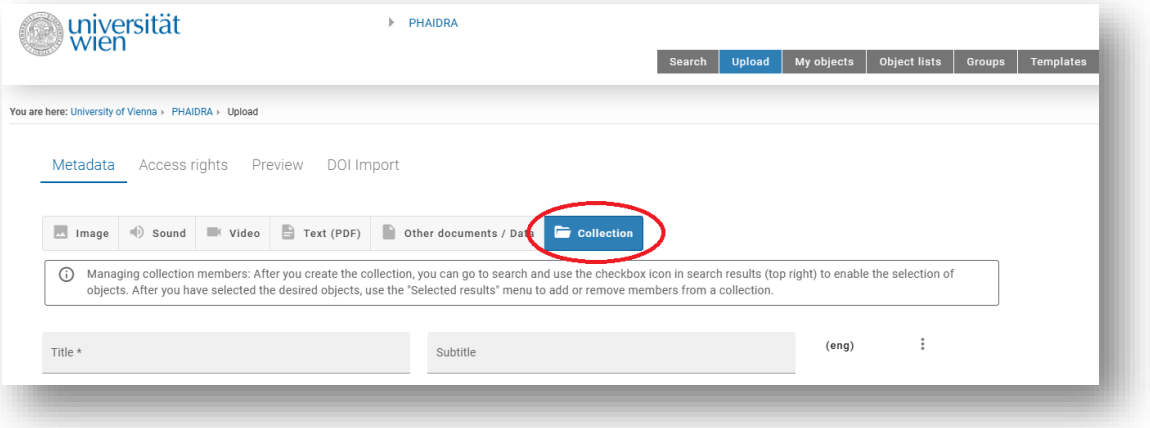

Figure 79: Metadata editor (detail). Marked in red: the selected object type *Collection*.

From this point onwards, Collections differ in several respects from objects that contain files.

Collection-specific properties in the metadata editor

As usual, the metadata editor offers the three tabs: *Metadata*, *Access rights*, *Preview* and *DOI Import*. Many functions are identical to those for creating a single object, but the following important differences apply:

No file upload

Collections do not contain their own files. Therefore, the ***'File to upload'*** field and the **Object type** (e.g. photograph, slide, etc.) are omitted from the Metadata tab. Collections consist exclusively of metadata and references to other objects.

Mandatory fields for collections

The following metadata must also be completed for collections (as with individual objects; see Chapter 6 Creating objects → 6.2.1.1.):

***Title**
***Description**
***Keywords**
***Role (persons and/or institutions)**
***Association**

The **License** field is not available or required, as Collections do not contain their own files (rights are granted exclusively at the level of member objects) (see also Figure 80).

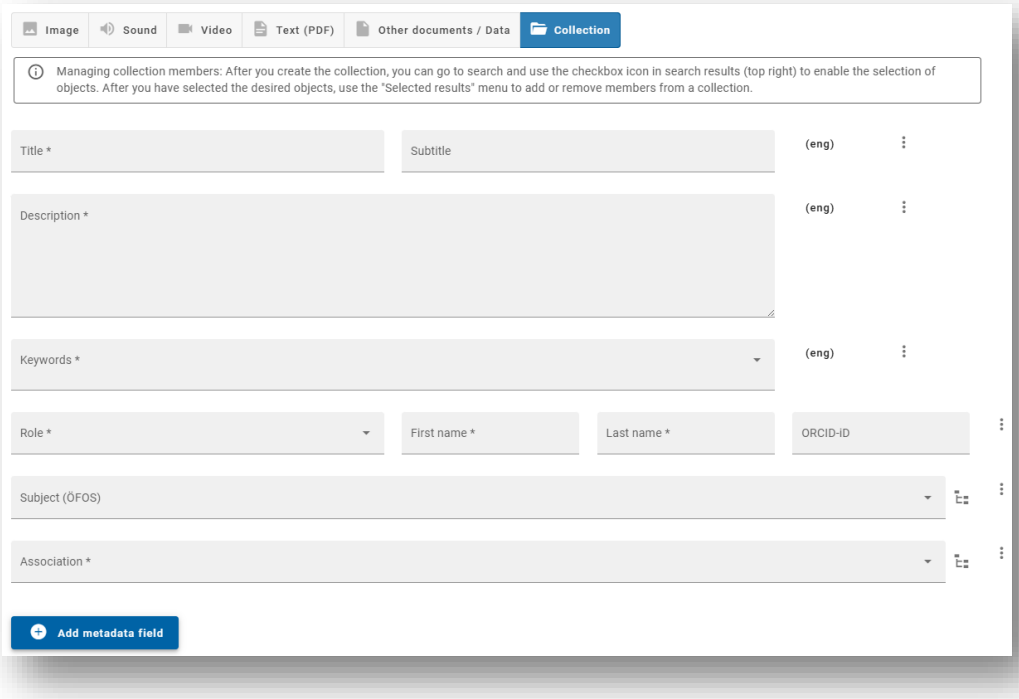

Figure 80: Mandatory metadata fields for the object type *Collection*.

Optional metadata fields

All optional fields (see Chapter 6 Creating objects → 6.2.1.2.) can also be used for Collections, e.g. project data, bibliographic details, terminology services or accessibility information. A Collection can therefore be described in just as much detail as any other object.

Preview

The *Preview* tab displays a summary of all metadata before the collection is created. If everything is correct: click *Upload* → The collection is created and is assigned a PHAIDRA URL and a handle. Once uploaded, it is immediately visible (unless otherwise restricted) and appears under *My Objects*. It does not yet contain any members — these must be added in the next step (see Chapter 9 Collections → 9.2.1.).

9.2. Managing members

A collection is only complete once digital objects or sub-collections have been added to it. PHAIDRA therefore offers functions to add, remove or reorder objects within the collection.

9.2.1. Adding objects to a collection

PHAIDRA offers two options for adding digital objects or other collections to a collection:

- by selecting objects or other collections in the *My Objects* tab or via the search function (suitable for multiple objects/sub-collections at once),
- directly from the detailed view of an object or another collection (suitable for individual objects/sub-collections).

To be able to add digital objects or sub-collections to a collection yourself, you must be the owner of the collection. However, you do not need to be the owner of the digital objects or sub-collections that you add to a collection. This means that third-party objects can also be included in your collection (e.g. for curated collections, thematic overviews, OER collections, etc.).

In principle, an object can be a member of several different collections at the same time.

Assigning an object to a collection does not alter the object itself: metadata, access permissions, license and persistent identifier remain unchanged. Collections are purely structural levels – they provide context, but do not create new rights or new files.

Collections can contain any number of digital collections and sub-collections.

Workflow option 1: Add objects via My Objects or Search

This option is particularly suitable when several objects are to be added to a collection at once. It works both in the *My Objects* tab (for your own objects) and in the *Search* tab (for your own and/or third-party objects).

1) Log in to PHAIDRA.
2) As required: open the *My Objects* tab (for your own objects) or the *Search* tab (for your own and/or third-party objects).
3) Click the *'Select search results'* button above the results list (see Figure 81) → Checkboxes appear in front of the objects.

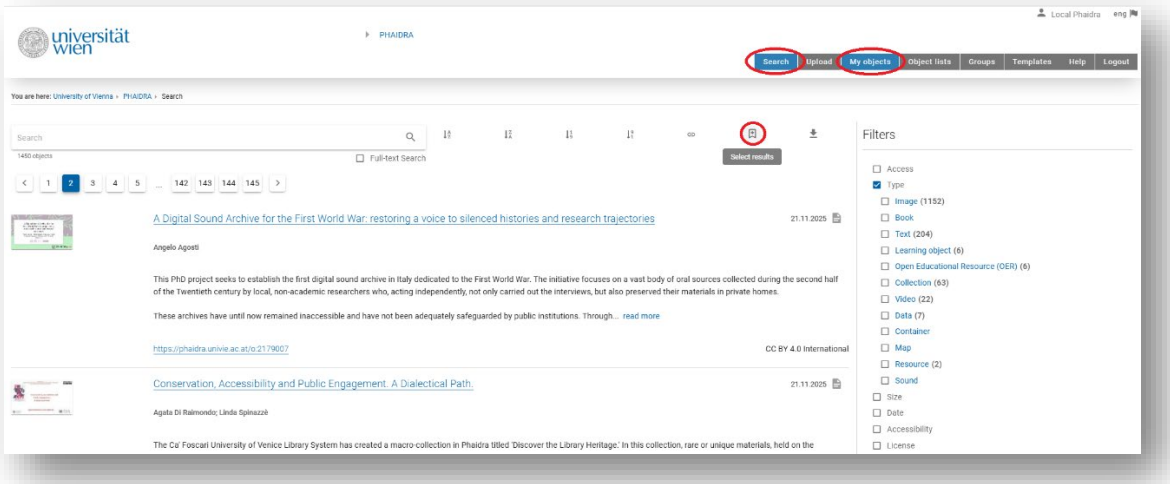

Figure 81: Overview of your own objects in the *My Objects* tab. By clicking on *Select results,* objects can be selected for further processing.

4) Tick the **boxes** next to all objects to be added to the collection (see Figure 82).

5) Below the search bar, click on the ***'Selected results (…)'*** button (see Figure 82).

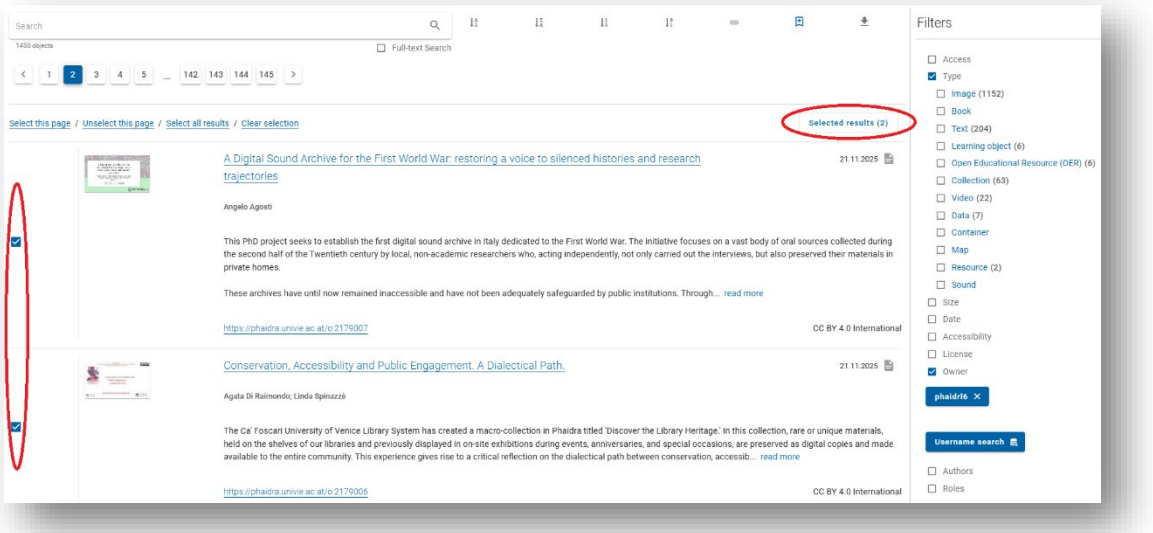

Figure 82: Small boxes appear to the left of the results list, which can be ticked. Then click on *Selected results (…).*

6) Select the ***'Add to Collection'*** option (see Figure 83).

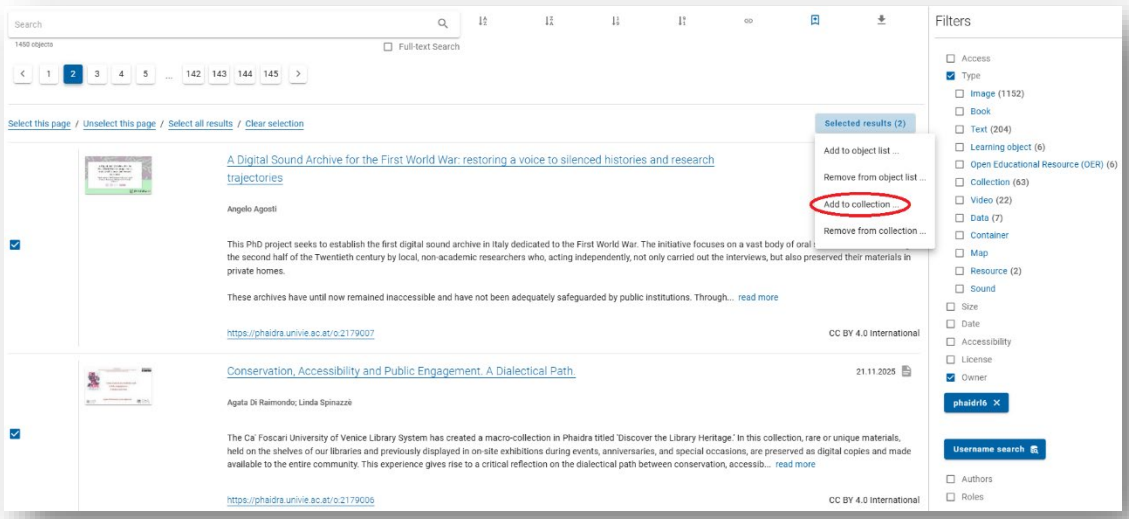

Figure 83: Clicking on *Selected results (…)* opens a window. Highlighted in red: the *'Add to collection…'* option.

7) Select the **target collection** (see Figure 84) → The relevant objects are added to the selected collection as members (see Figure 85).

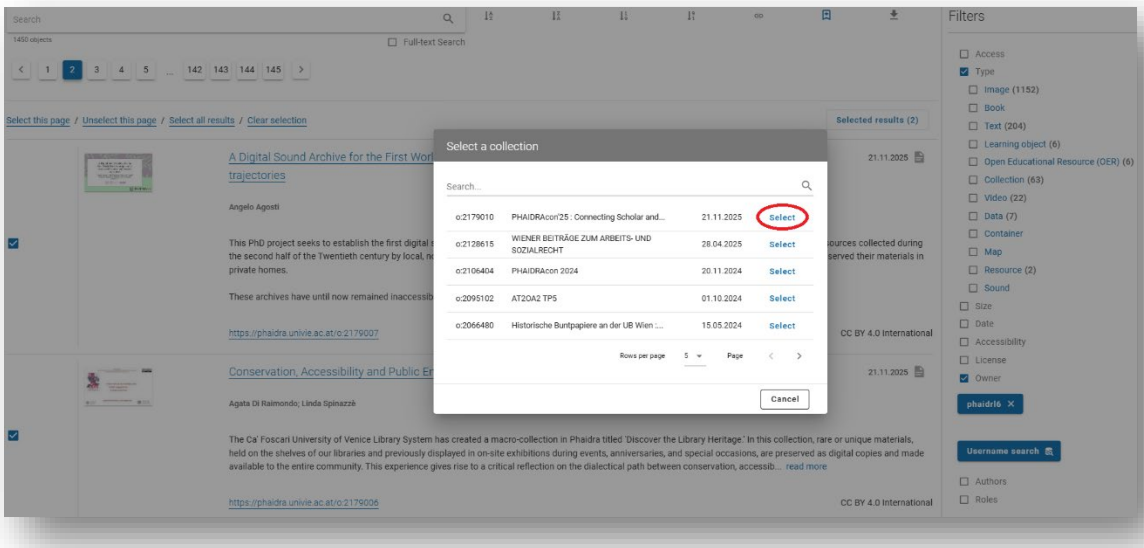

Figure 84: All available collections are displayed. Highlighted in red: the selection button for the target collection o:2179010.

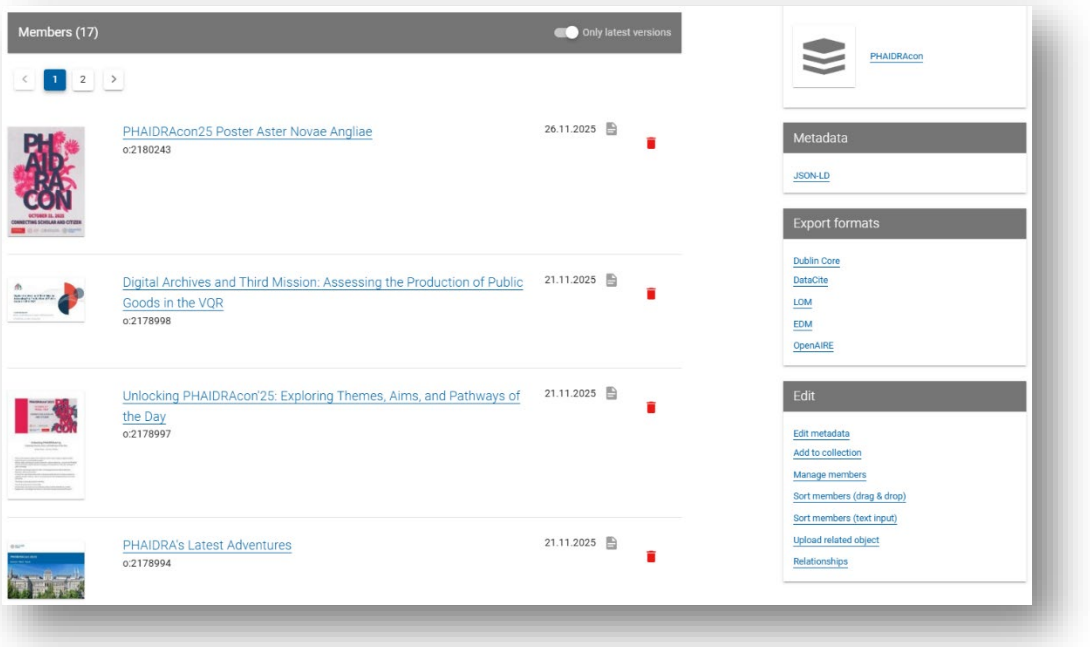

Figure 85: All member objects are listed in the detailed view of the collection o:2179010.

Workflow option 2: Add objects from the detailed view

This option is suitable if **a single object or a small number of objects** are to be specifically added to one or more collections (see also Chapter 8 Editing objects retrospectively → 8.2.). It is **only** possible **for your own objects**, as the object's editing area is used here.

1) **Log in** to PHAIDRA.

2) Open the relevant object in the **detailed view**.

3) In the information and function area (on the right), scroll down to the ***Edit*** box.

4) Select the option to ***add to collection*** (see Figure 68 in Chapter 8 Editing objects retrospectively → 8.2.).

5) Select the **target collection** (see Figure 69 in Chapter 8 Editing Objects Retrospectively → 8.2.) → The relevant object is added as a member of the selected collection.

In the detailed view of the object or objects, the *'This object is in collection'* box now appears in the information and function area (on the right) (see Figure 70 in Chapter 8 Editing objects retrospectively → 8.2.). All collections to which the object or objects belong are listed there. Clicking on the collection title opens the detailed view of the corresponding collection directly.

9.2.2. Removing objects from a collection

Removing member objects is possible at any time for **owners of the relevant collection** and **affects only the assignment of the objects to the collection**, not the objects themselves. The affected objects remain in PHAIDRA and retain their metadata, identifiers, access permissions and licenses.

Workflow

1) **Log in** to PHAIDRA.

2) Open the relevant collection in the ***detailed view***.

3) Scroll down to the ***Members*** section. To the right of each listed object is a red **bin icon** (*Remove from Collection*) (see Figure 86).

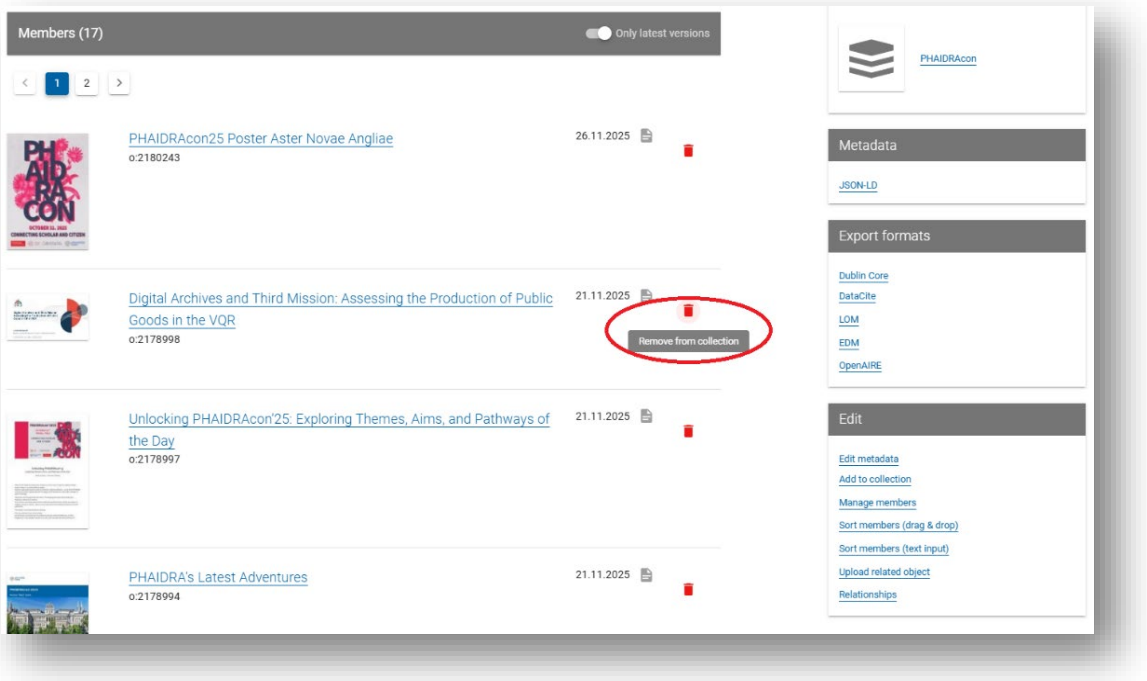

Figure 86: Member objects of collection o:2179010. Highlighted in red: the bin icon, used to remove an object from the collection (visible only to the collection owner).

4) Click on the **bin icon** next to the relevant object → The assignment is immediately revoked.

This does not delete the object, but merely removes it from this collection.

9.2.3. Sorting members

The order of the member objects in a collection determines how they are displayed to users in the **detailed view** of that collection. It can be **changed** by the **collection owner** if required. PHAIDRA offers two different sorting methods for this:

- **Drag & Drop**
  Visual sorting, ideal for smaller collections or intuitive reordering.

- **Text input**
  Sorting by position numbers, particularly suitable for large collections or precise sorting requirements.

Workflow

1) **Log in** to PHAIDRA.

2) Open the relevant collection in the **detailed view**.

3) In the information and function area (on the right), scroll down to the ***Edit*** box. Two sorting methods are available there:

4) a) *Sort members (drag & drop)*
   Opens a window with a list of all members. Each object can be dragged and moved using the mouse (see Figures 87 and 88).

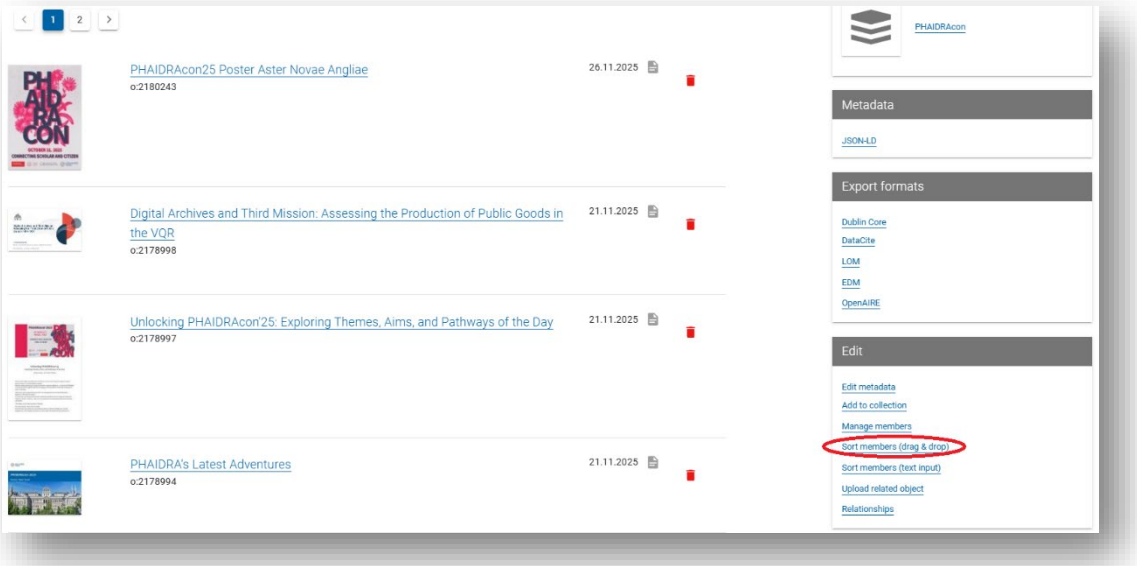

Figure 87: Detailed view of collection o:2179010 (detail). Marked in red: the *Sort members (drag & drop)* button in the *Edit* box (visible only to the collection owner).

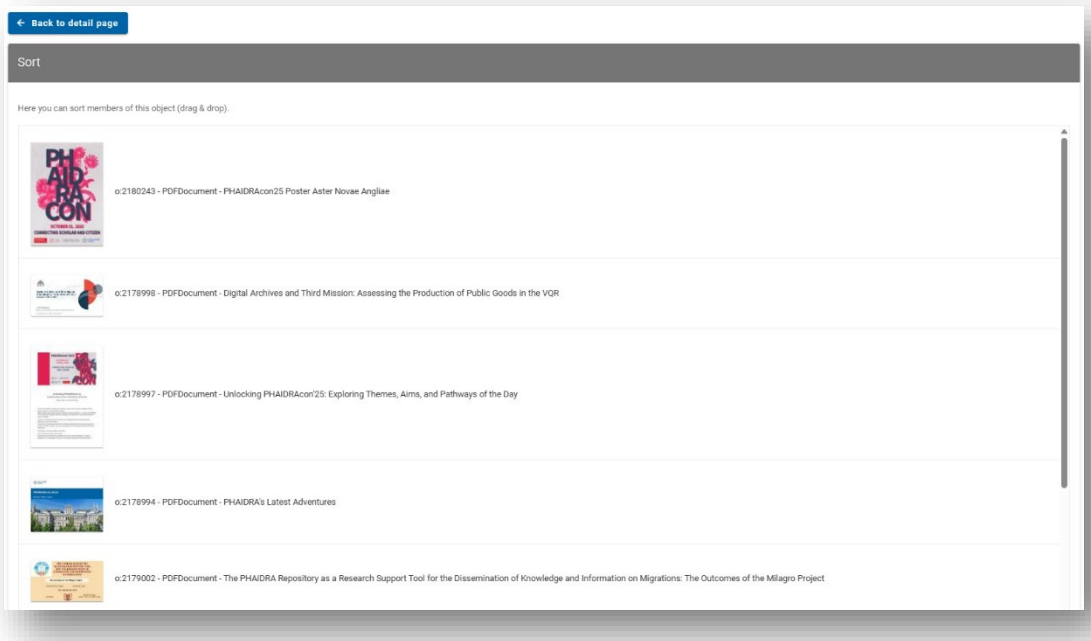

Figure 88: Window in which the members of Collection o:2179010 can be sorted using drag & drop.

b) *Sort members (text input)*

Opens a list in which the new order can be assigned based on the members' persistent identifiers (see Figures 89 and 90).

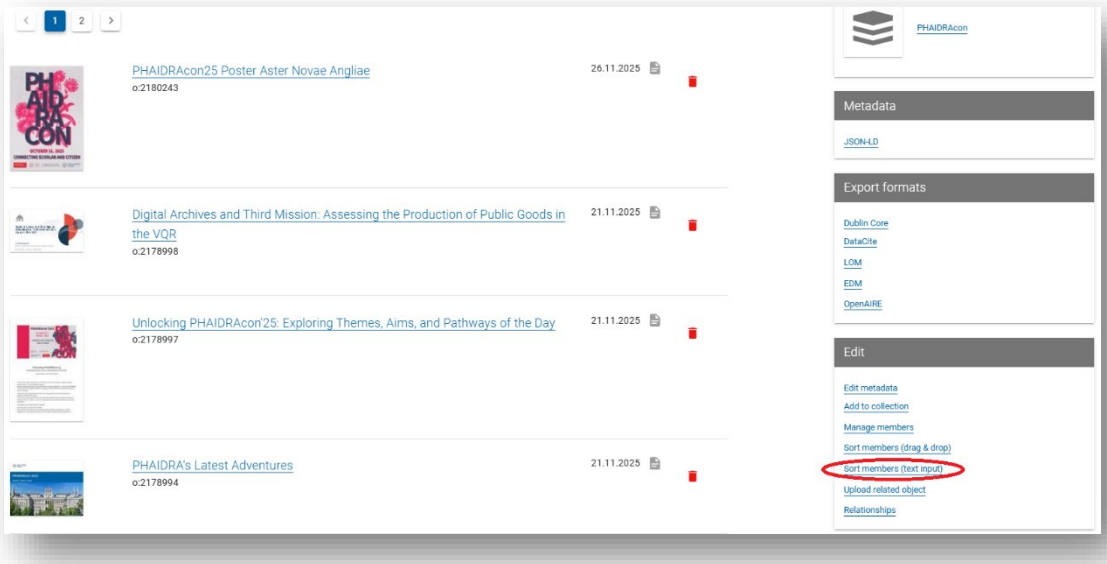

Figure 89: Detailed view of the collection o:2179010 (detail). Marked in red: the *'Sort members (text input)'* button in the *'Edit'* box (visible only to the collection owner).

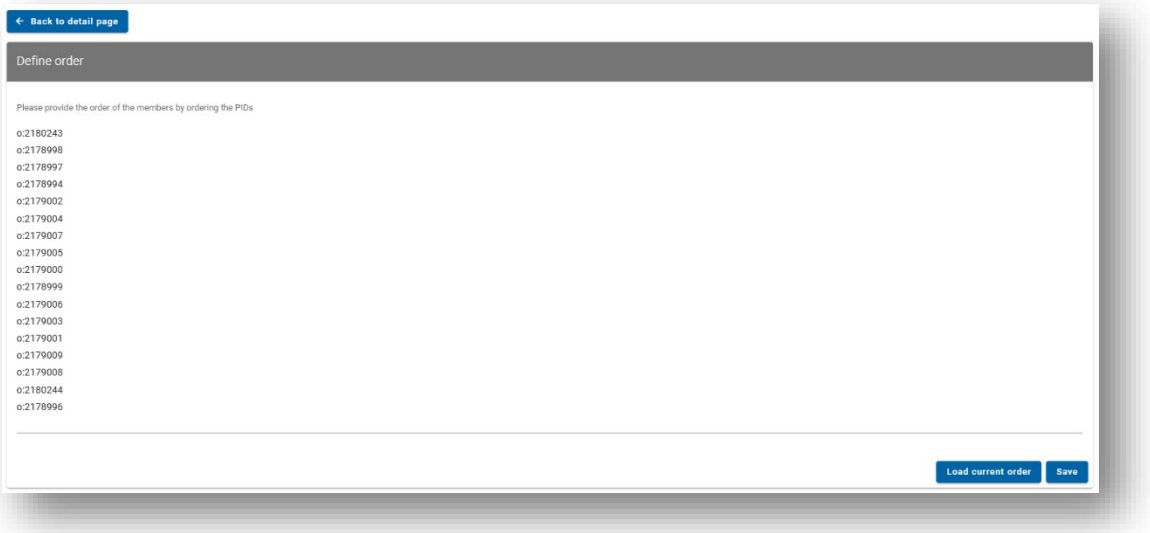

Figure 90: Window in which the members of collection o:2179010 can be sorted by entering the PIDs.

5) Click on *Save* → The new order is visible immediately.

10. Object lists

Object lists are a simple tool in PHAIDRA for temporarily collecting search results or selected objects so that they can be retrieved later or shared with others. They allow you to save a selection of digital objects (files, archive folders, etc.) and/or collections in a list and generate a link for it.

Typical use cases

- Compiling a list of interesting objects for colleagues,
- Creating a wish list for your own research,
- Temporarily saving search results,
- Preparing a future collection.

Object lists differ significantly from collections: they do not have their own metadata or persistent identifiers, do not represent a structural level within the repository, and do not fulfil a long-term archiving function. However, they can be created quickly, can be modified or deleted at any time, and serve to support research and provide a better overview.

10.1. Create a new object list

You can only work with object lists after logging in. Once logged in, the *Object Lists* tab appears in the navigation bar. Clicking on it opens an overview of all object lists that you have already created.

Workflow

1) Log in to PHAIDRA.
2) Select the ***Object Lists*** tab in the navigation bar (see Figure 91).

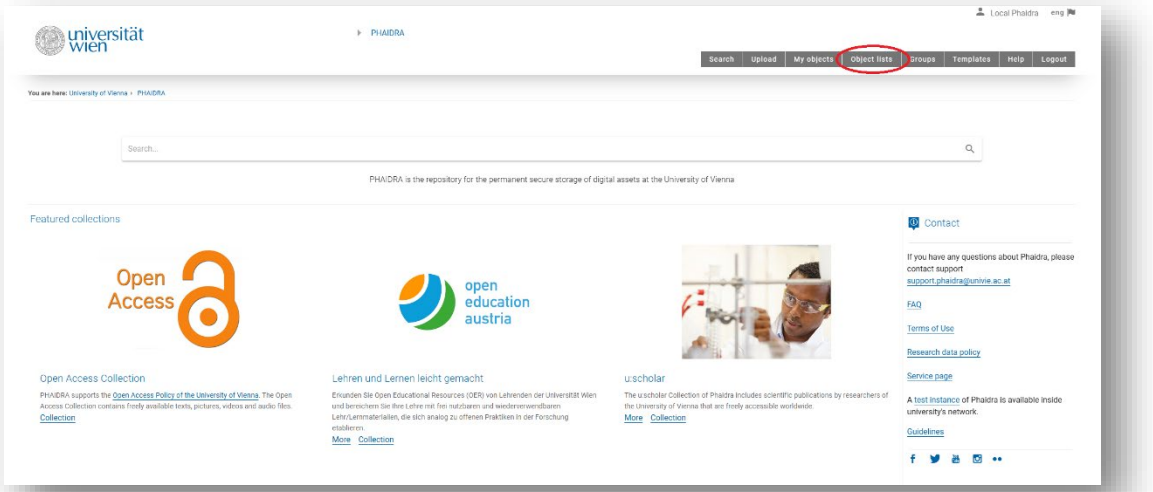

Figure 91: PHAIDRA home page (after logging in). Marked in red: *Object lists* tab in the navigation bar.

3) Click on ***'Create new object list'*** (see Figure 92).

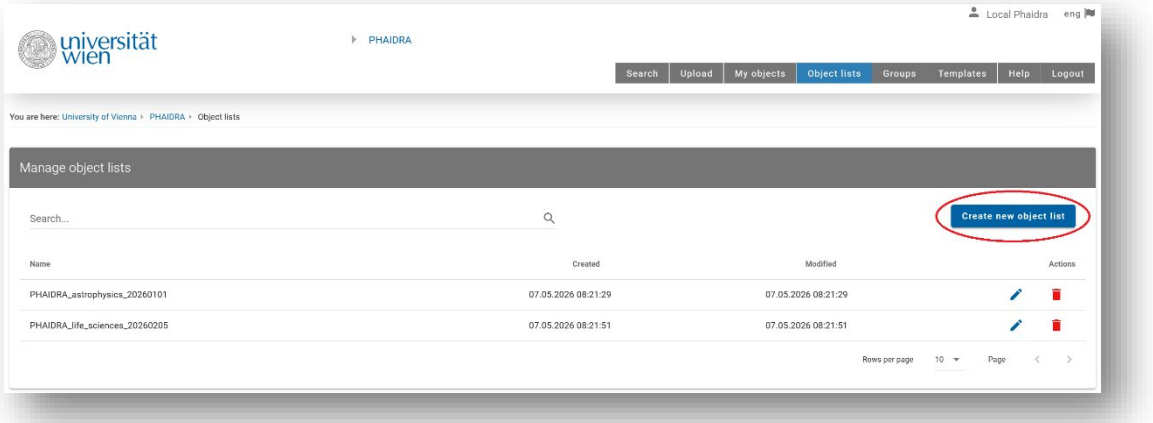

Figure 92: Overview of all created object lists. Marked in red: the *Create new object list* button.

4) Enter a name for the object list (see Figure 93).

5) Click on ***Create*** (see Figure 93) → The new object list is created and appears immediately in the overview.

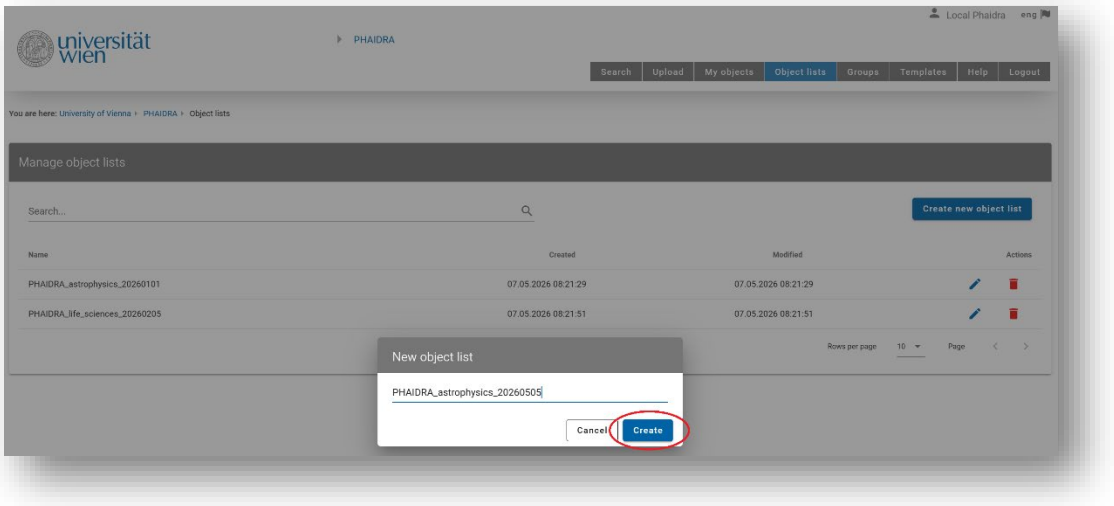

Figure 93: Window for naming and creating a new object list.

10.2. Adding objects to an object list

Adding objects to an object list works in a similar way to Collections (see Chapter 9 Collections → 9.2.1.). **Any number of objects** can be added; **third-party objects** (belonging to other owners) can also be included. The objects themselves remain **unchanged** (no changes to metadata, licenses or rights).

Workflow

1) **Log in** to PHAIDRA.

2) Open the *Search* tab in the navigation bar.

3) **Search** for the relevant **objects or collections**.

4) Click the *'Select results'* button (see Figure 94).

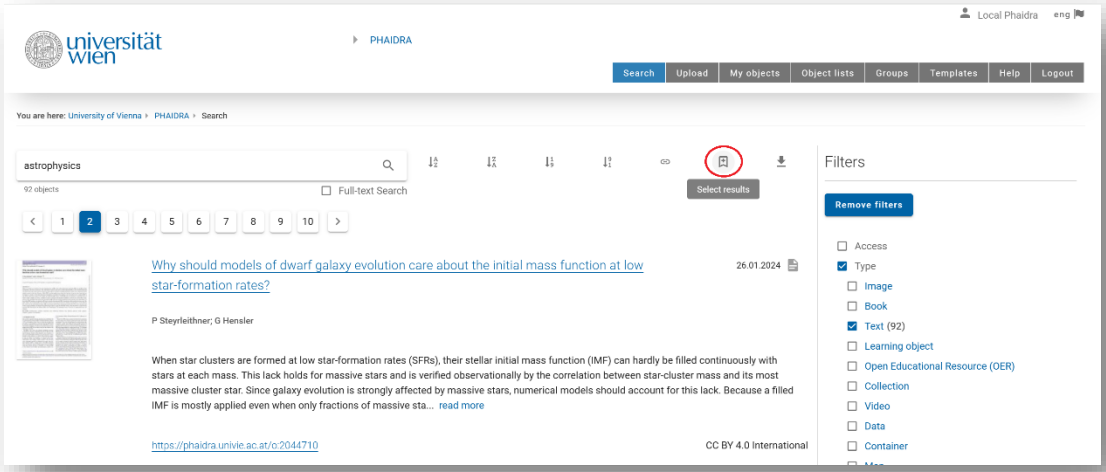

Figure 94: Searching for objects. Highlighted in red: the '*Selected results*' button.

5) Tick the **checkboxes** for all relevant results (see Figure 95).

6) Click on ***Selected results (…)*** and ***add to object list*** (see Figures 95 and 96).

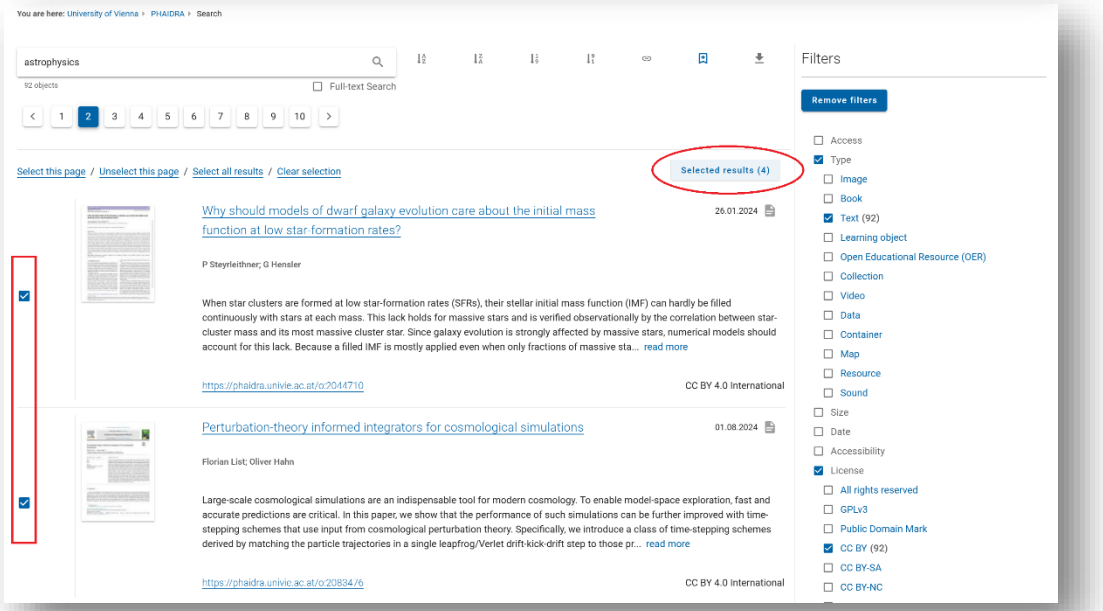

Figure 95: Small boxes appear to the left of the results list, which can be ticked. Then click on *Selected results (…)*.

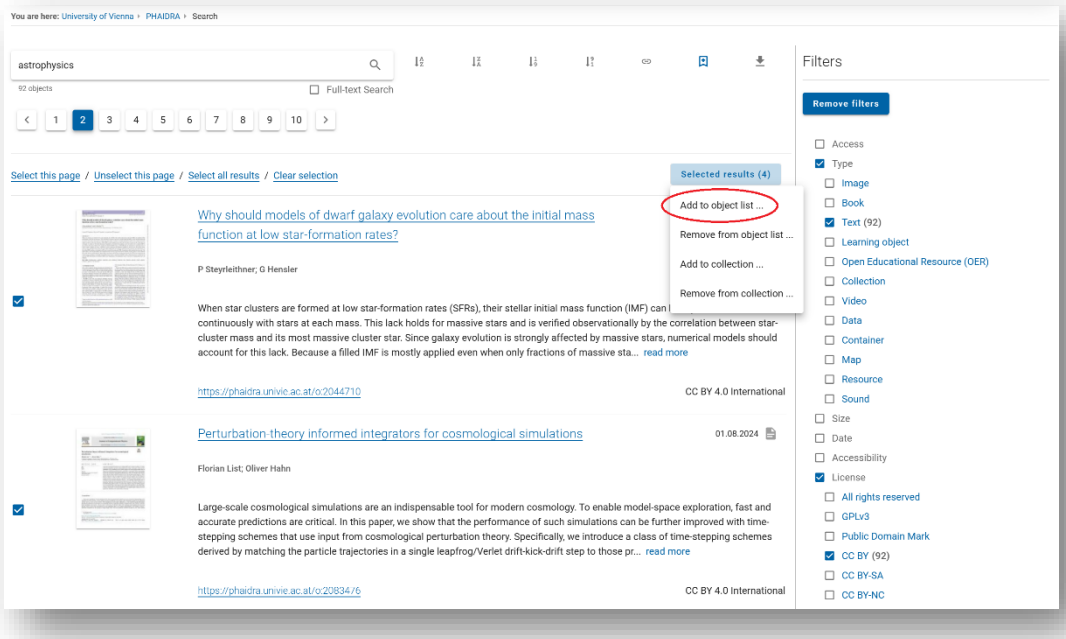

Figure 96: Clicking on *Selected results (…)* opens a window. Marked in red: the option to *add to object list*….

7) Select **target object list** (see Figure 97) → The selected objects are added to the object list.

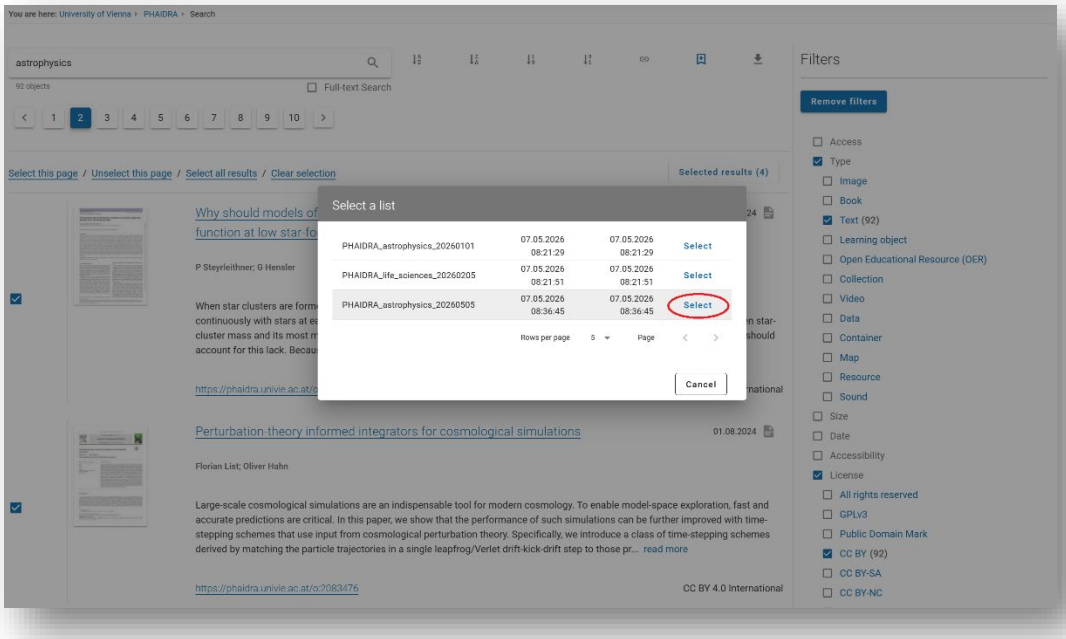

Figure 97: Overview of all object lists. Marked in red: the selection button for the object list to which the objects will be added.

10.3. Edit object list

Object lists can be **customised** or **expanded**. Editing is only possible after logging in and affects only the list, not the objects it contains.

Workflow

1) **Log in** to PHAIDRA.

2) Open the ***Object Lists*** tab in the navigation bar.

3) In the overview of object lists, click the **pencil icon** (*Edit*) next to the relevant list (see Figure 98).

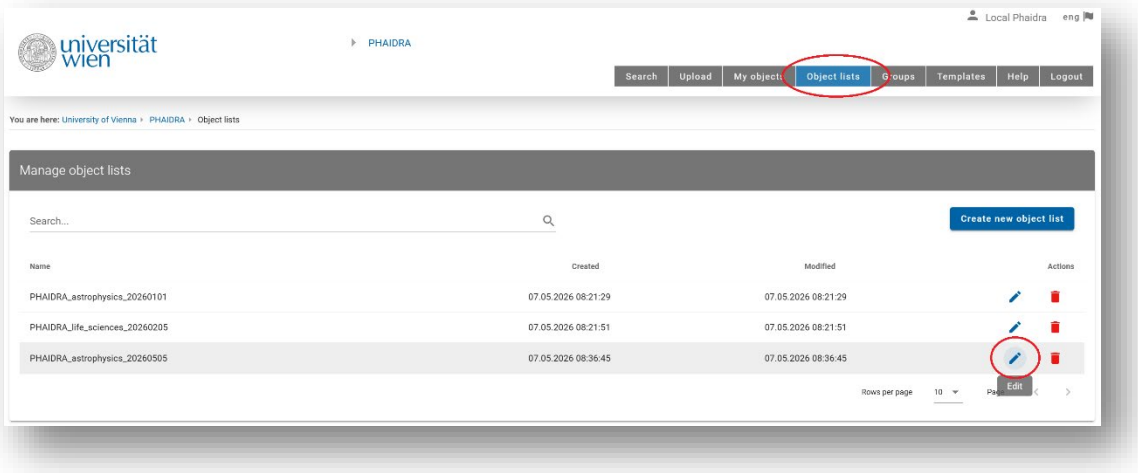

Figure 98: Overview of all created object lists. Highlighted in red: the *Object Lists* tab and the button to edit a list.

→ The object list opens and displays an overview of all objects it contains, each with a title and persistent identifier (see Figure 99).

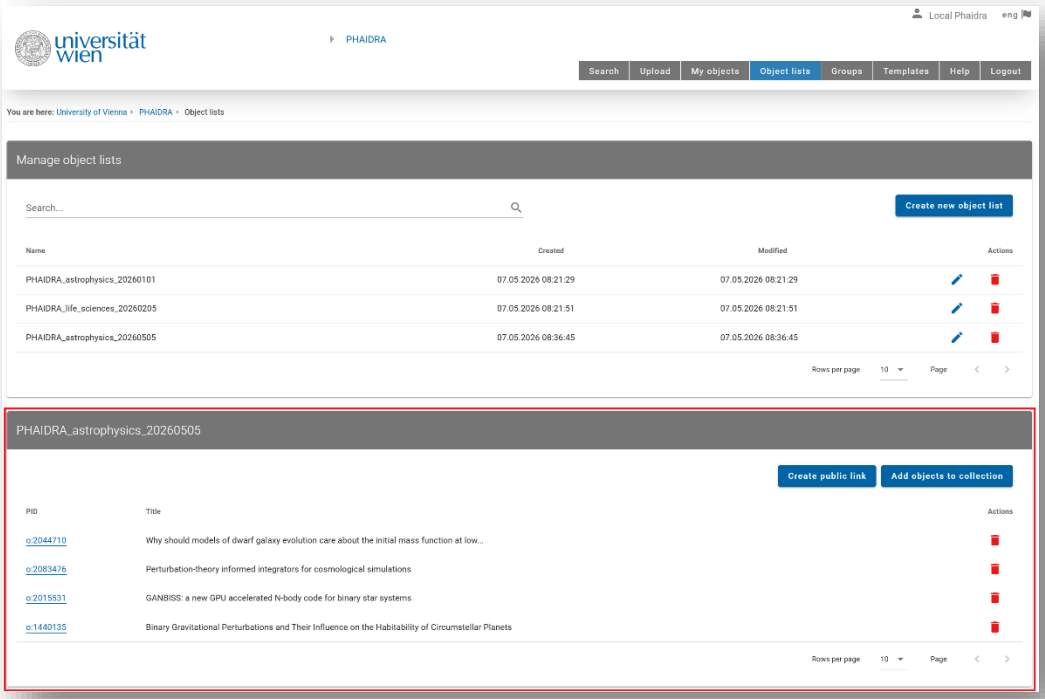

Figure 99: Overview of all created object lists. Marked in red: the object list *PHAIDRA_astrophysics_20260505*, opened for editing, including the objects assigned to it.

Several functions are available for managing the object list:

4) a) **Removing objects from the object list**

Next to each object is a red **bin icon**. Clicking on the icon removes the object from the object list (the object itself remains stored in PHAIDRA; see Figure 100).

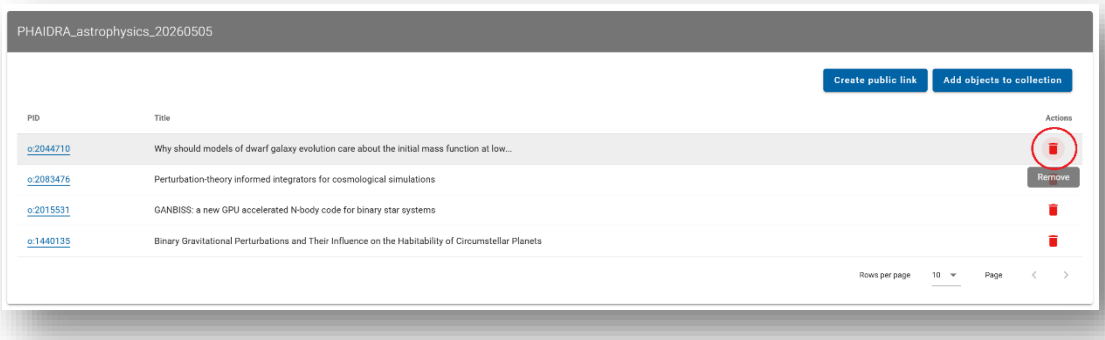

Figure 100: View of the object list *PHAIDRA_astrophysics_20260505*. Marked in red: the bin icon to remove an object from the list.

b) Adding objects to a collection

By clicking the *'Add objects to collection'* button, all objects in the object list can be added to a collection at once (see Figure 101).

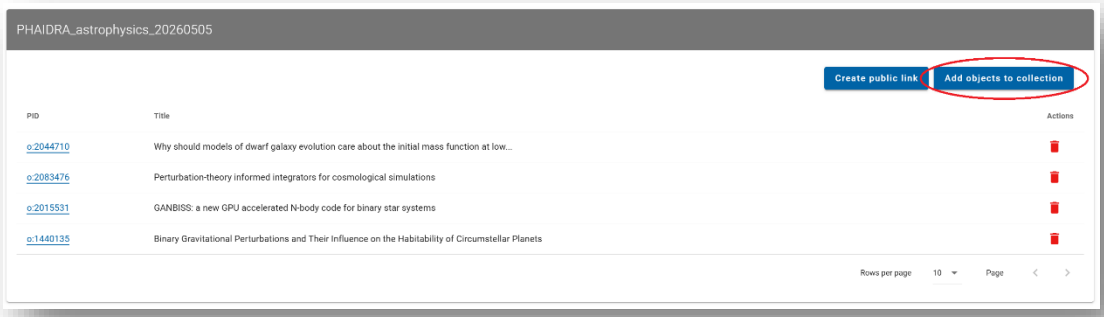

Figure 101: View of the object list *PHAIDRA_astrophysics_20260505.* Marked in red: the button to add the objects to a collection.

c) Create a public link to the object list

A link to the object list can be generated using the *'Create public link'* button. This **is not a persistent identifier**, but a simple link that is suitable, for example, as a personal watchlist or for sharing with colleagues (see Figure 102).

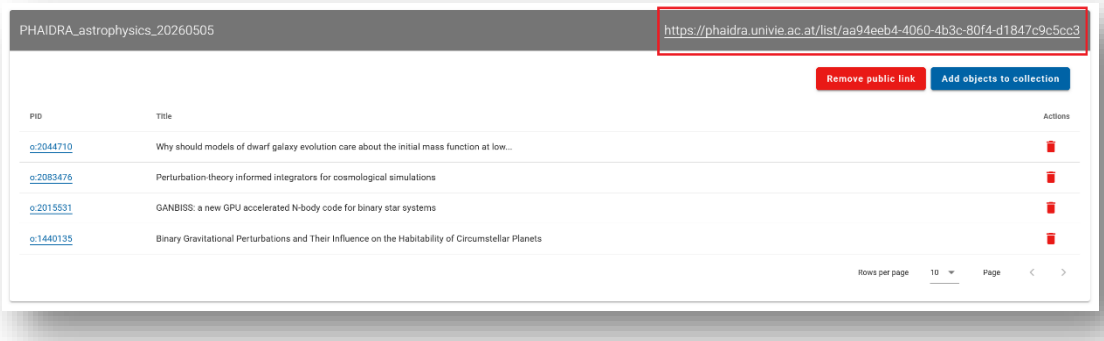

Figure 102: View of the object list *PHAIDRA_astrophysics_20260505.* Marked in red: the public link to the object list that has been created.

10.4. Deleting an object list

Object lists can be **deleted** at any time. Deletion completely removes the object list, whilst all objects it containws remain unchanged in PHAIDRA.

Workflow

1) **Log in** to PHAIDRA.

2) Open the ***Object Lists*** tab in the navigation bar.

3) In the overview of object lists, click the red **bin icon** (*Delete*) next to the relevant list (see Figure 103).

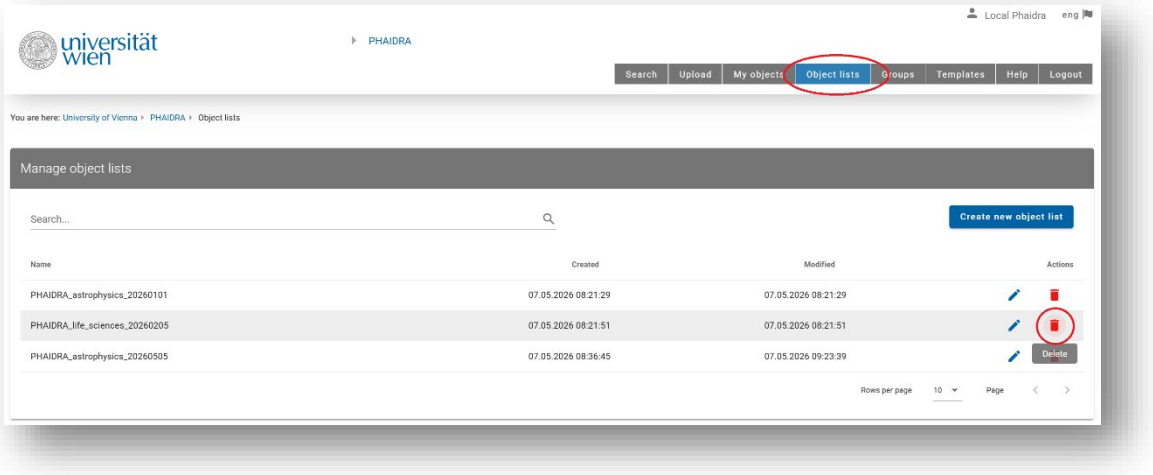

Figure 103: Overview of all created object lists. Marked in red: The bin icon to delete an object list.

→ A window opens to confirm the deletion request.

4) Click on ***Delete*** → The object list is deleted (the objects themselves remain stored in PHAIDRA).

11. Groups

Groups in PHAIDRA are **user groups**, not object groups. They are used to group several users together **in order** to grant **access rights to objects collectively** to this group. Typical use cases include project teams or working groups that need to access the same – restricted-access – objects. Working with groups is only possible **after logging in**.

After logging in to PHAIDRA, the *Groups* tab appears in the navigation bar. Clicking on it opens an overview of all the groups you have created.

11.1. Create a new group

Workflow

1) **Log in** to PHAIDRA.

2) Open the *Groups* tab in the navigation bar → The group overview opens.

3) Click on *Create new group* (see Figure 104).

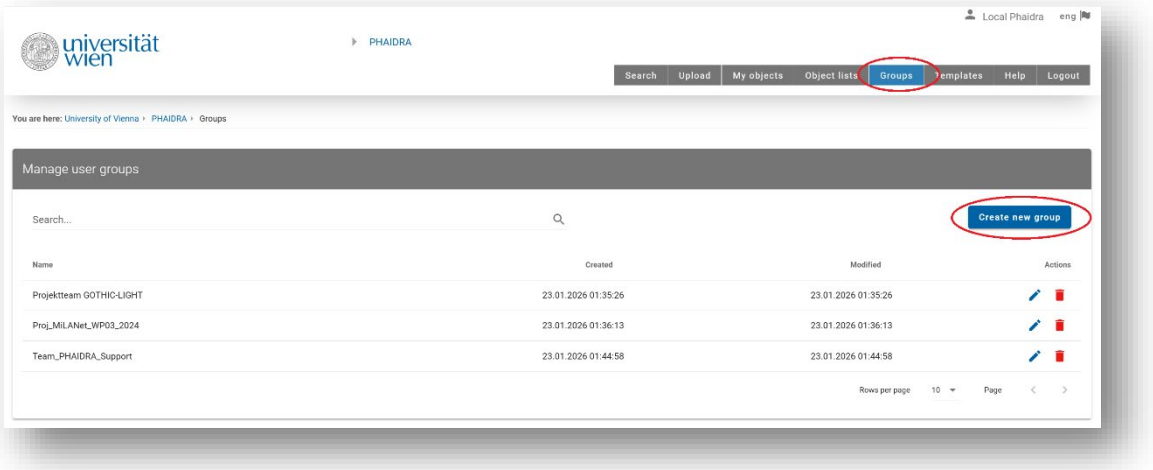

Figure 104: Overview of all created groups. Highlighted in red: the *Groups* tab in the navigation bar and the *Create new group* button.

4) Enter a **name** for the group (see Figure 105).

5) Click on *Create* (see Figure 105) → The group is created and displayed in the overview, showing the name, creation date and date of the last modification.

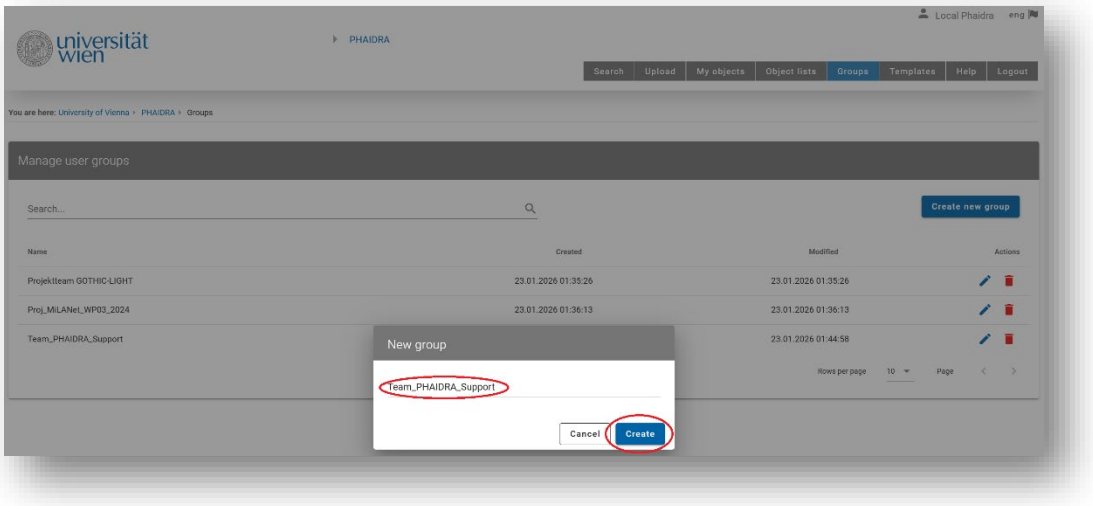

Figure 105: Window for naming and creating a new group.

11.2. Adding users to a group

Once a group has been created, users can be added.

Workflow

1) Log in to PHAIDRA.

2) Open the *Groups* tab in the navigation bar → The group overview opens.

3) In the group overview, click the pencil icon (*Edit*) next to the relevant group (see Figure 106) → The group's edit view opens.

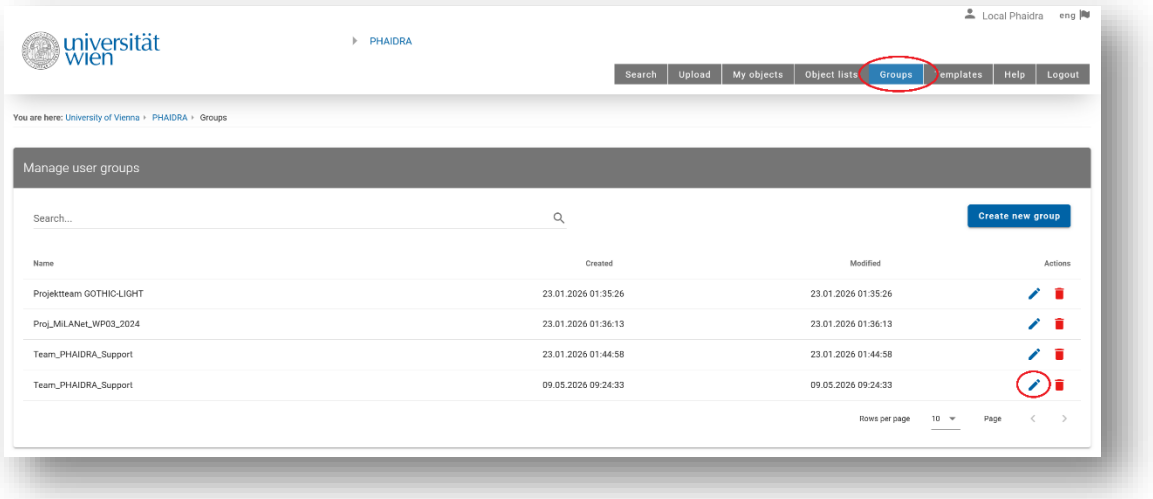

Figure 106: Overview of all created groups. Marked in red: the *Groups* tab and the pencil icon to edit a group.

4) Click on ***'Username search'*** below the list (see Figure 107) → A search window opens.

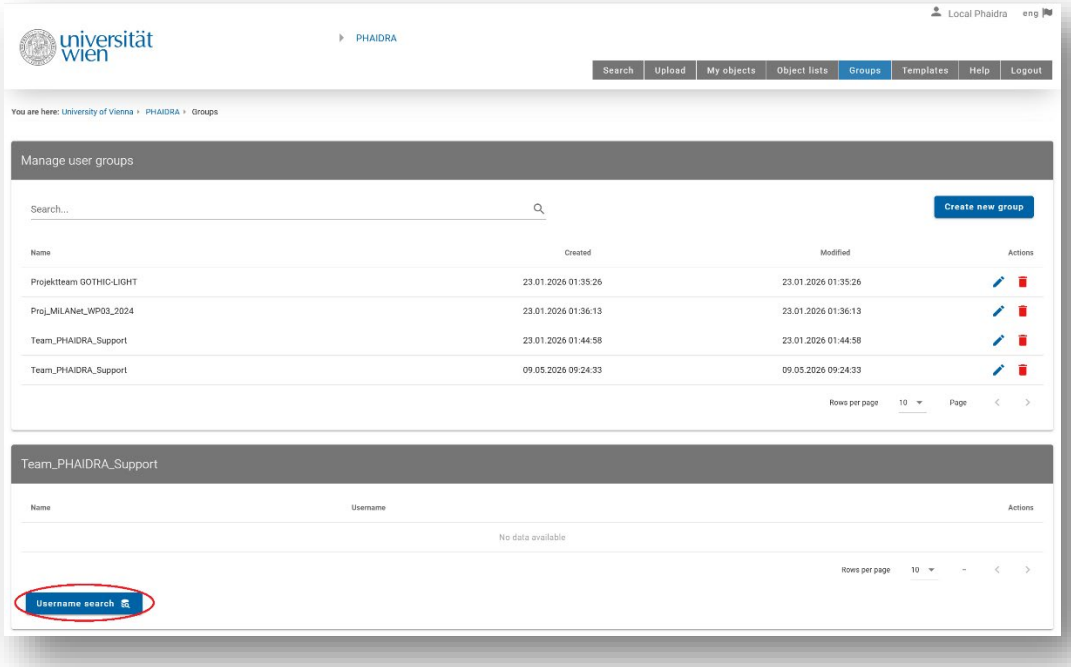

Figure 107: Overview of all created groups. Marked in red: the *'Username search'* button in the *Team_PHAIDRA_Support* group, which is open for editing.

5) Search for **u:accounts** in the search bar (Note: the search is not by person's name; see Figure 108).

6) **Select** the relevant **username** and click ***Select*** (see Figure 108) → The user is added to the group.

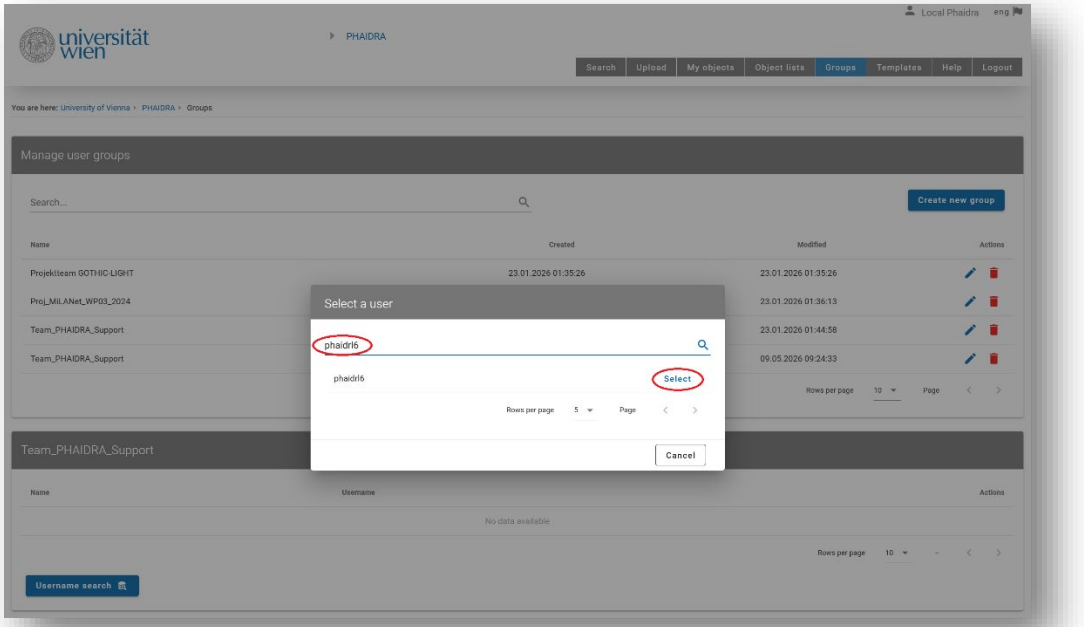

Figure 108: Enter the account (individual u:account or service email address) to be added to the group. Confirm by clicking *Select*.

11.3. Using groups for access rights

By using groups, access rights to objects can be granted to a specific group of users. Groups can be used both **when uploading** an object and **subsequently** when editing access rights.

Workflow

1) **Log in** to PHAIDRA.

2) Depending on your needs, either **create** a **new object** (see Chapter 6: Creating Objects) or **edit** an **existing object** (see Chapter 8: Editing Objects Later).

3) In the object's metadata editor, open the ***Access rights*** tab (see Figure 109).

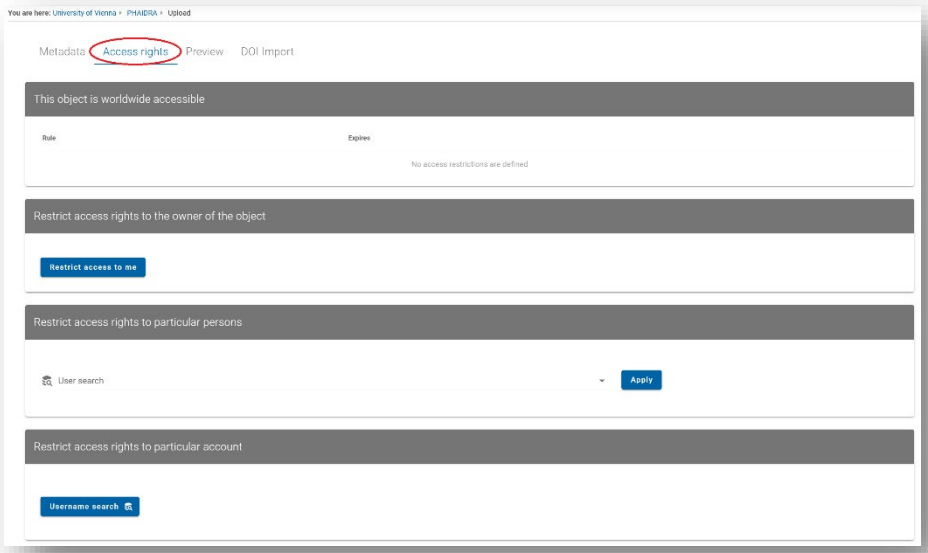

Figure 109: Metadata Editor (detail). Marked in red: the open *Access rights* tab.

4) Scroll down to the section ***Restrict access rights to particular groups*** → The list displays all the groups you have created yourself (see Figure 110).

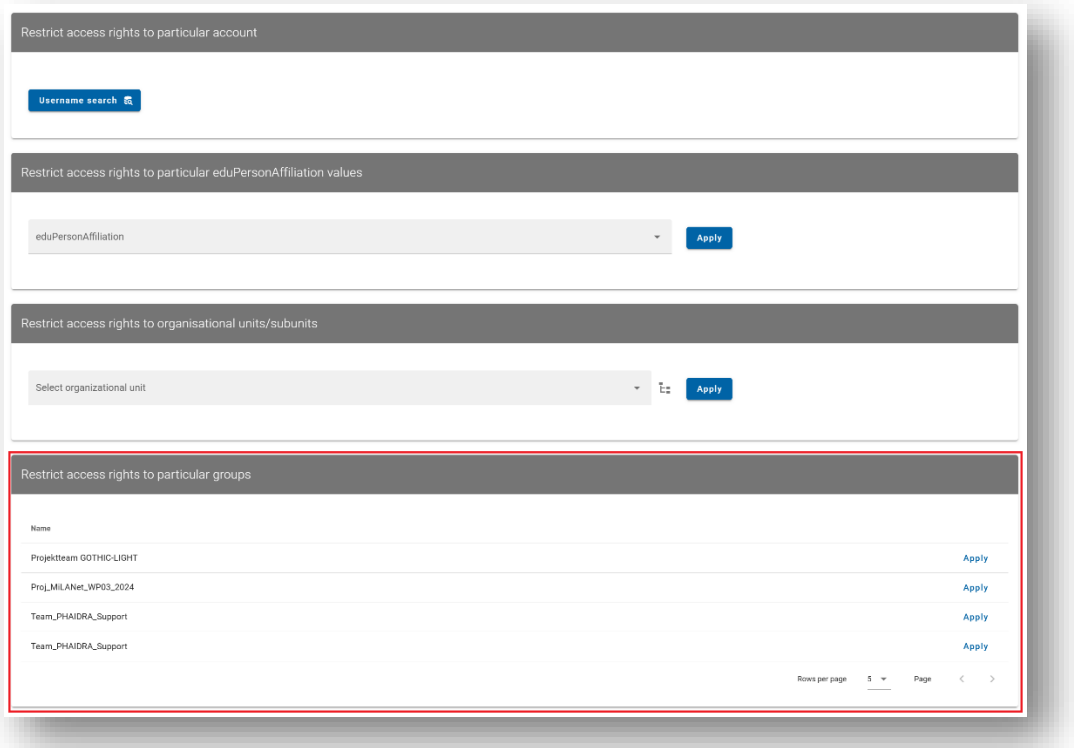

Figure 110: Metadata Editor (detail). Highlighted in red: the section *'Restrict access rights to particular groups'* in the *'Access Permissions'* tab.

5) **Select** the relevant **group** (see Figure 111).

6) Click ***Confirm*** (see Figure 111) → All members of the selected group are granted access to the object (preview and download).

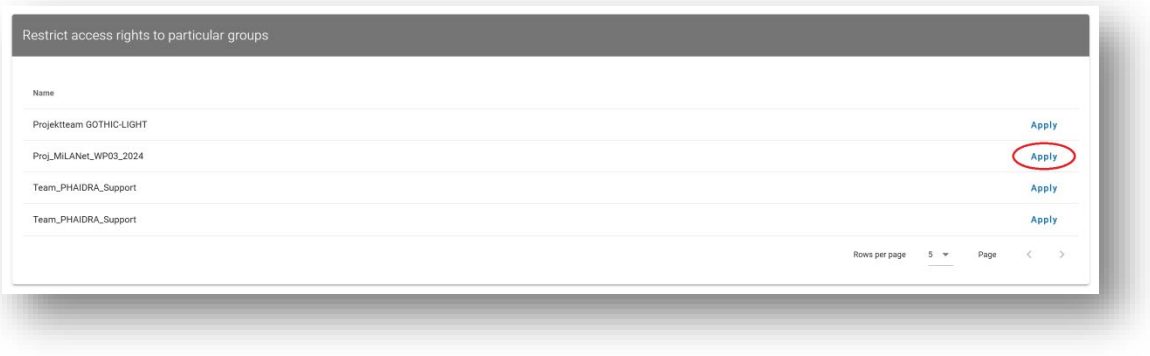

Figure 111: Metadata Editor, *'Restrict access rights to particular groups'* section. Highlighted in red: *'Confirm'* button to grant a group access to the digital object.

Once confirmed, any **new members** added to the group at a later date will automatically be granted access to the object. **Group members who are removed** will lose access accordingly. The rule takes effect immediately and can be changed or removed at any time.

Note: A detailed description of all (other) options in the *Access rights* tab can be found in Chapter 6 Creating Objects → 6.2.2.

11.4. Removing users from groups

Users can be removed from a group at any time. This has an immediate effect **on all objects** for which the relevant group is used for access rights.

Workflow

1) **Log in** to PHAIDRA.

2) Open the ***Groups*** tab in the navigation bar → The group overview opens.

3) Click the **pencil icon** (*Edit*) next to the relevant group (see Figure 112) → The group's edit view opens, displaying all current group members.

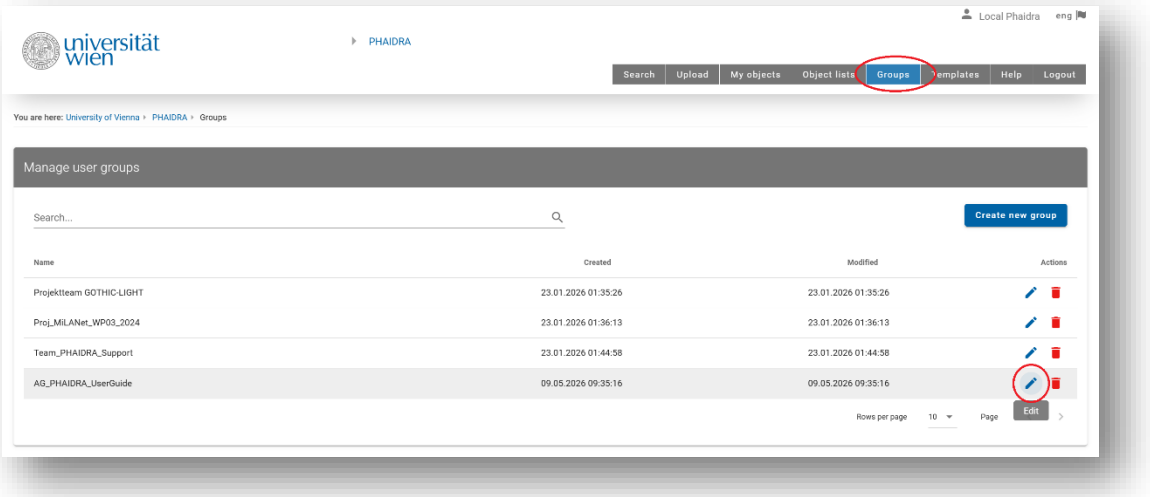

Figure 112: Overview of all created groups. Marked in red: the *Groups* tab and the pencil icon to edit a group.

4) Click on the red **bin icon** (*Delete*) next to the person to be removed (see Figure 113) → The user is immediately removed from the group.

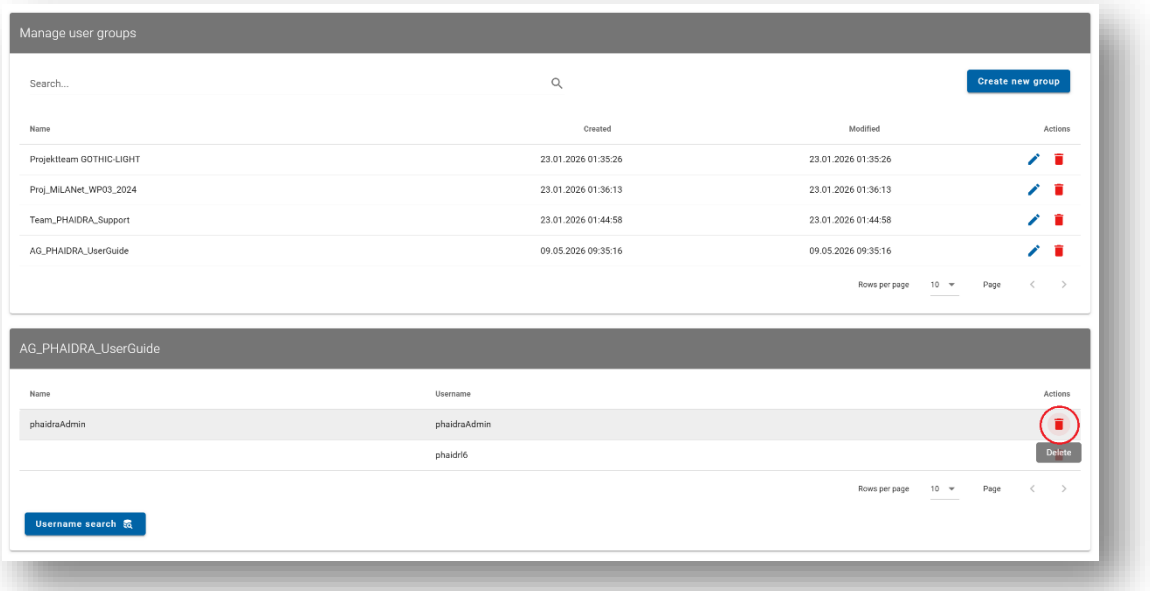

Figure 113: Overview of all created groups and the expanded group *AG_PHAIDRA_UserGuide*. Marked in red: the bin icon to remove an account from the group.

The removed person or account immediately loses access to all objects for which this group is used as an access rule. The objects themselves remain unchanged. Other group memberships of the person or account remain unaffected.

11.5. Deleting groups

Groups can be deleted entirely if they are no longer required.

Workflow

1) Log in to PHAIDRA.

2) Open the *Groups* tab in the navigation bar → The group overview opens.

3) Click on the bin icon (*Delete*) next to the relevant group (see Figure 114).

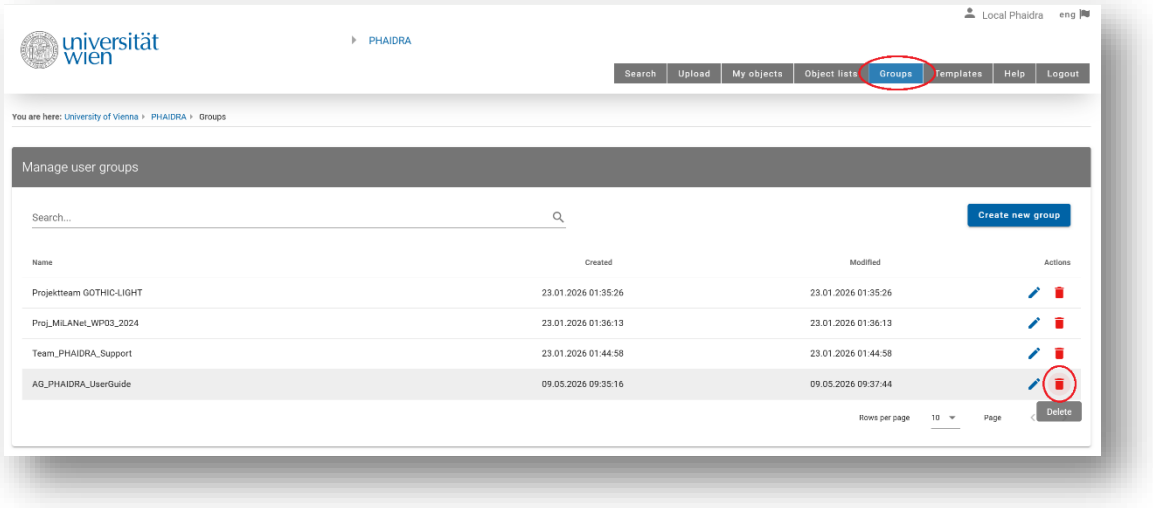

Figure 114: Overview of all created groups. Marked in red: the *Groups* tab and the bin icon to delete a group.

4) Confirm the action by clicking on ***Delete*** (see Figure 115) → The group will be completely removed.

Note: Deleting a group does **not** delete **any objects**. **Access permissions** that referred to this group will become **invalid** → The affected objects will then either be publicly accessible (unless there are other restrictions) or protected by other access rules. Deleting a group **cannot** be undone.

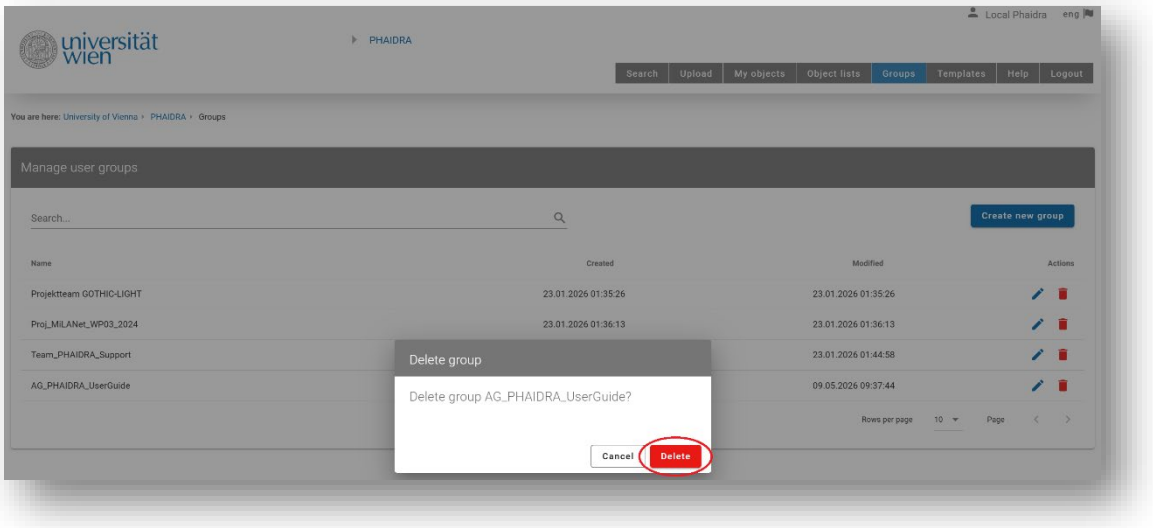

Figure 115: Window for deleting a group. Marked in red: the button to confirm the deletion process.

12. PHAIDRA Sandbox (test environment)

The PHAIDRA Sandbox is a non-public **test environment** in which users can **practise** uploading, describing and organising objects in PHAIDRA (see Figure 116). It is intended solely for **testing, training and demonstration purposes** for both users and PHAIDRA Support, and is **not a long-term archive**. Using the PHAIDRA Sandbox is particularly helpful unexperienced PHAIDRA users, for practising the upload workflow, and for testing metadata and organisational structures.

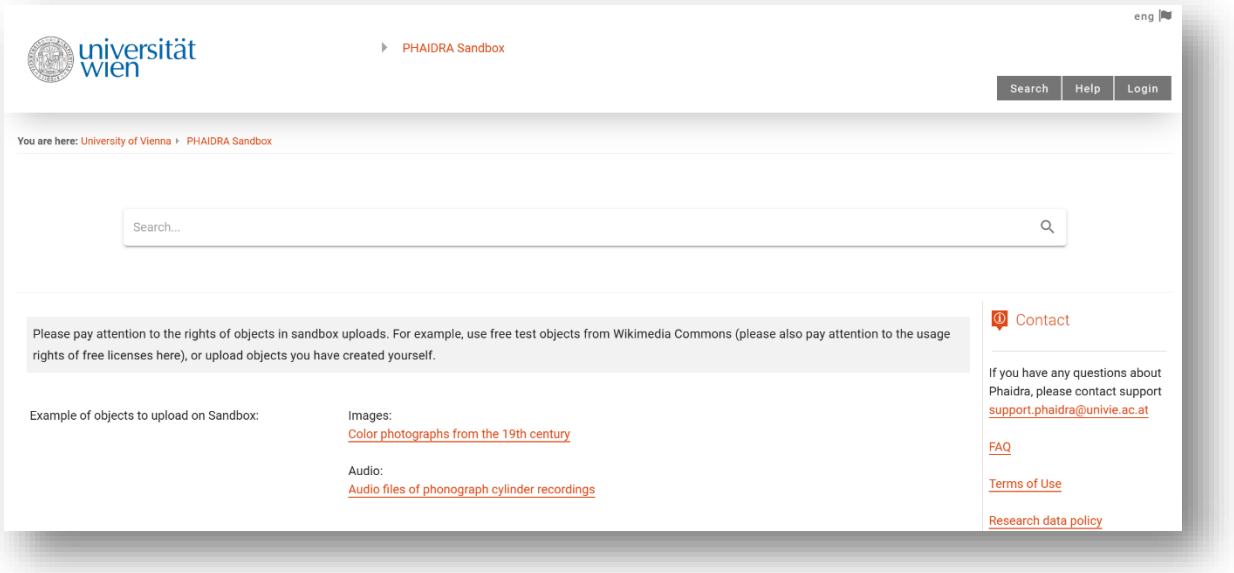

Figure 116: PHAIDRA Sandbox home page. Unlike the production version, the test environment is coloured orange.

12.1. Access

The PHAIDRA Sandbox can be accessed at the following address: https://sandbox.phaidra.org.

Important: Access to the Sandbox is only possible from the **University of Vienna's data network**. One of the following connections is required: wired University network access, eduroam Wi-Fi or a VPN connection to the University of Vienna.

Login is possible via the same account as in the production system (individual u:account or service email address; see Chapter 2 Login and Home Page → 2.1.).

12.2. Differences from the production instance

The Sandbox largely corresponds to the PHAIDRA production environment, but has some important differences:

Accessibility

Content in the Sandbox is **not publicly** visible. The Sandbox is intended exclusively for testing, training and demonstration purposes.

Persistent identifiers

Objects in the Sandbox are **not** assigned **a handle** or **a DOI**. Only **internal sandbox URLs** are assigned. The button for requesting DOIs for your own objects is not available.

OER upload

The special OER upload workflow is **not** available in the Sandbox.

Visual distinction

To distinguish it more clearly from the production system, the **Sandbox user interface** is **orange**, whilst PHAIDRA itself is blue (see Figure 116).

12.3. Functionality

The following functions are available – as in the production system – and can be tested:

- Uploading files,
- Management of digital objects,
- Use of the metadata editor,
- Access management,
- Creation and use of templates, collections, groups and object lists.

12.4. Handling data

Even though the Sandbox is not a public platform, the following applies: You may only upload data for which you hold **the relevant rights**. Alternatively, we recommend using **dummy or test files**.

The Sandbox is reset regularly. All content may be deleted at any time without prior notice. The **permanent storage of data** in the Sandbox is therefore **not** guaranteed.