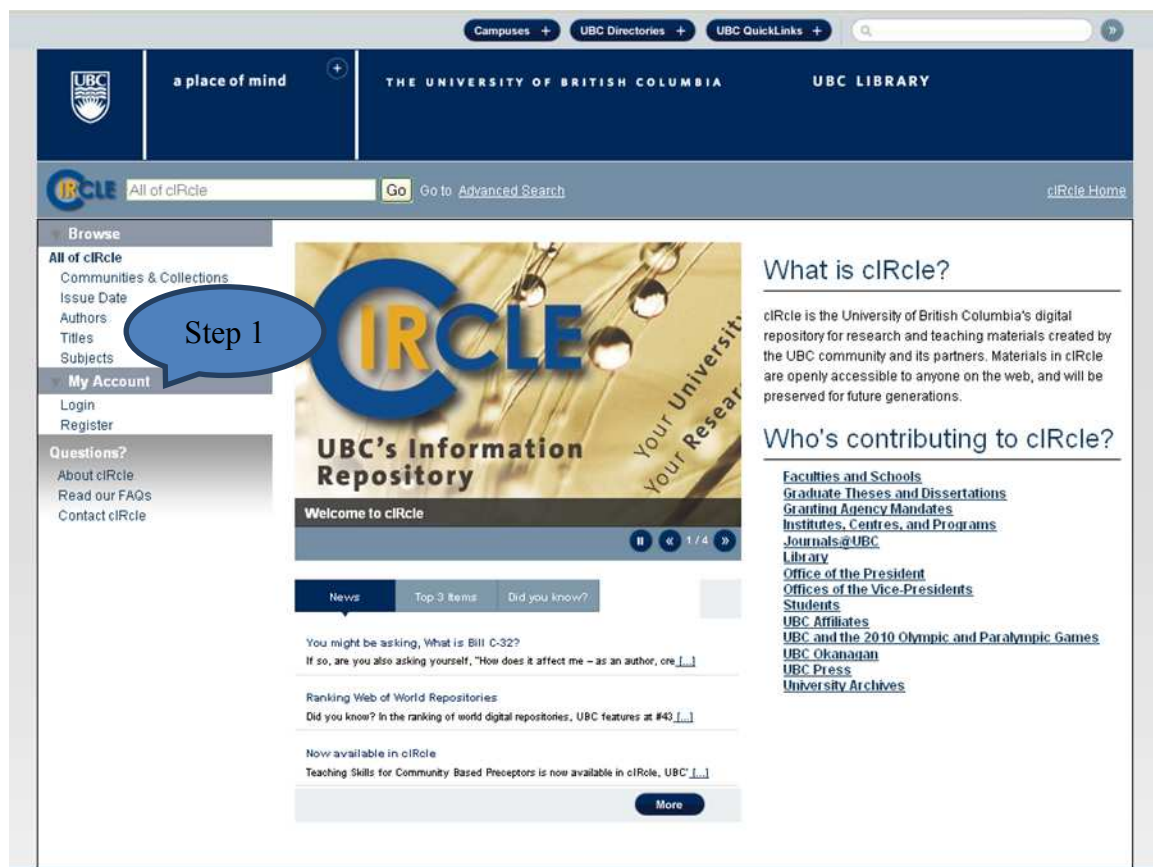Uploading a New Submission to cIRcle

The following guide will lead you through each step of uploading a submission to cIRcle. The length of time required to upload a submission will depend on file size, the number of files, the amount of metadata added and other details specific to each submission. At its quickest, uploading should only take a few minutes.

Step 1. Login to your account: On the cIRcle homepage at circle.ubc.ca, click on **"Login"** under **"My Account"** in the left sidebar.

TIP! At several stages in the upload process, you will be given the option to **"Save and Exit"** *if you wish to complete the submission at another time.*

Step 2. Choose a login method: Use your CWL or your cIRcle login to login to your account.

TIP! If you have not signed up for a cIRcle login, please contact us at ubc-circle@interchange.ubc.ca.

Step 3. Start a new submission (Part 1): Under "My Account", click on **"Submissions"** to go to your "Submissions & workflow tasks" page.

Step 4. Start a new submission (Part 2): On your "Submission & workflow tasks" page, click on **"Start a new submission"**.

TIP! If you have already completed a submission during this session, the prompt will read **"Start another submission"**.

Step 5. Select a collection for your item: On the "Item Submission" page, click on **"Select a collection"** from the drop-down menu. Choose a collection for your item. Click on **"Next"** to continue.

TIP! The "Collection" is the one into which you have been authorized to submit your item (for theses/dissertations authorization, contact Faculty of Graduate Studies). Want to add an item to multiple collections? Please contact ubc-circle @interchange.ubc.ca.

Step 6. Describe the item (Part 1): There are two stages to describing the item. To complete the first stage, fill in all required fields. **Required fields** will display in red if you do not fill them in and you will be prompted to complete this step before continuing the submission process. You may also fill in the optional fields if desired. When you have finished, click on **"Next"** to continue.

TIP! Click on **"Save & Exit"** *to save your unfinished submission and complete it at another time. Look for this option throughout the submission process.*

Step 7. Describe the item (Part 2): Fill in all required fields to complete the final stage of describing your item. If applicable, fill in any other optional fields. Click on **"Next"** to continue.

TIP! Remember that Required Fields will display in red if not completed.

Step 8. Upload a file: Click on **"Browse"** to select the file from your computer. If there is only one file to be uploaded, simply click on **"Next"** and proceed to Step 10. If you have more than one file to upload, click on **"Upload"** and continue to Step 9.

TIP! If you need to place an embargo on your item/work, email the cIRcle Office at ubc-circle@interchange.ubc.ca for consultation and/or approval—unless you are submitting a thesis or dissertation, in which case consult with the Faculty of Graduate Studies. If an embargo is placed without approval, the uploaded file(s) will automatically be kept private until the embargo is approved by the cIRcle Coordinator.

Step 9. Upload another file: If you clicked on **"Upload File(s)"** in Step 8, you will see the name of your file under "Files Uploaded". To add another file, click on **"Browse"** to select the file from your computer. Repeat this step to add multiple files. Click on **"Next"** when all the necessary files have been uploaded.

TIP! If you wish to remove a file uploaded by mistake, select the file you wish to remove under "Files Uploaded" then click on **"Remove Selected Items"**.

Step 10. Potential Duplicates: The system automatically checks for duplicate items in the database. The statement on the screen should read, "No potential duplicates found." Click on **"Next"** to continue.

TIP! This quality assurance check makes sure that there are no duplicate submissions already archived in cIRcle. If the statement indicates the presence of a duplicate, email the cIRcle Office at ubc-circle@interchange.ubc.ca *for assistance.*

Step 11. Review Submission: Under each of the "Describe Item" sections, verify that the information entered into all of the metadata fields is correct. Click on "**Next**" if there are no changes.

TIP! If you need to change the metadata in one of the fields, click on **"Correct one of these"**. *This will allow you to return to the relevant section to make changes. Be sure to click on the* **"Next"** *button after making any correction(s) to ensure the changes have been saved. To navigate through the* Item submission *sequence, simply use the tabs labelled, "Describe", "Upload", "Duplicate Check", etc. that appear at the top of the* Item submission *page.*

Step 12. Add a Creative Commons License (Optional): If you wish to select a Creative Commons License, click on the **"Proceed to Creative Commons website to select a license"** button. Continue to Step 13 in the "Uploading a submission" guide for further instructions. If you **do not** want to add a Creative Commons License to your item/work, then click on the **"Next"** button to proceed to Step 16 in the submission process.

TIP! Creative Commons Licenses govern what people who access your work may then do with it.
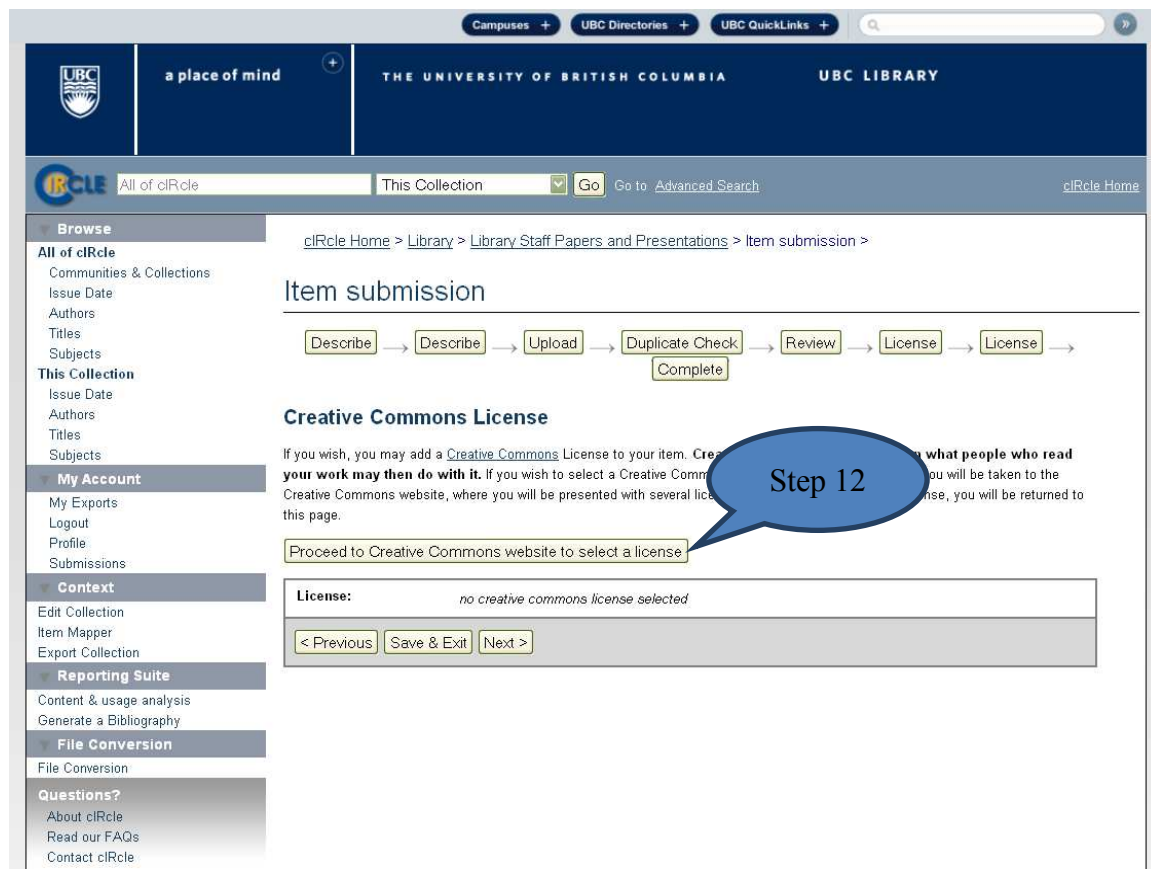
Important TIP when adding a Creative Commons License: When proceeding to the Creative Commons website, you may receive one or both of the following messages:

Message 1: "Security Warning: Although the page is encrypted, the information you have entered is to be sent over an unencrypted connection and could easily be read by a third party. Are you sure you want to continue sending this information?"

--Click on the **"Continue"** *button to proceed to the Creative Commons License website.*

Message 2: "This web page is being redirected to a new location. Would you like to resend the form data you have typed to the location?"

--Click on the **"OK"** *button to proceed.*

Step 13. Completing your Creative Commons License : On the Creative Commons License website, choose the type of license you prefer and click on **"Select a License".**

TIP! To help you decide which license to use, click on the **"More Info"** *link for each license type to learn more about conditions of use.*
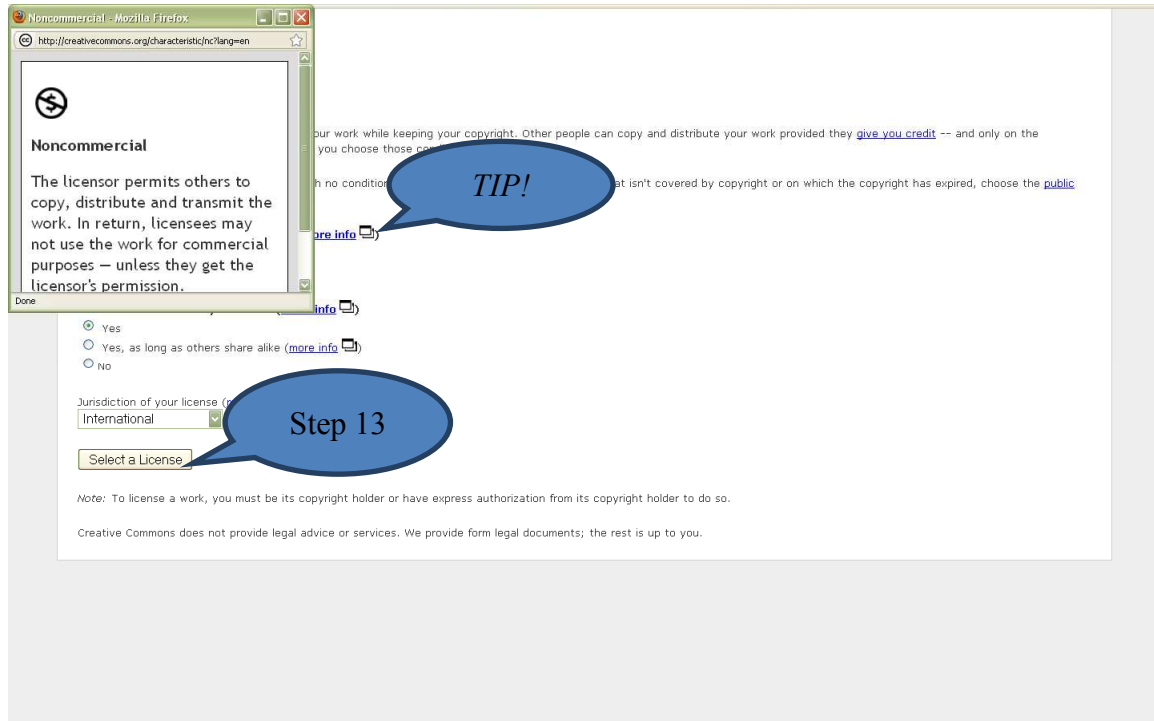
Step 14. Complete the Creative Commons License: After selecting your Creative Commons License, click on the **"You may now proceed"** link at the bottom of the screen. This will automatically return you to your unfinished submission in cIRcle.
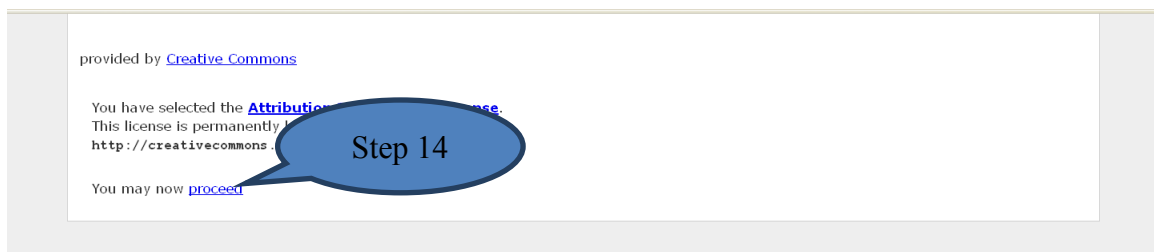
Step 15. Preview your Creative Commons License in cIRcle: Under the "Creative Commons License" section, you will now see the Creative Commons License you just created with its associated hyperlink next to the "License" field in cIRcle. If you do not wish to make any changes, click on **"Next"** to proceed to the last phase of the submission process.

TIP! To delete the Creative Commons License, click on the **"Remove this Creative Commons License"** button.

Step 16. Complete the cIRcle Non-Exclusive Distribution License: This is the final step in the submission process. The distribution license permits cIRcle to make your work available via the Web but you, as the author/creator, retain the copyright. Once you have read the license agreement, click on the box beside the statement, "I Grant the License". Click on the **"Complete submission"** button.

TIP! If you are submitting an item on behalf of someone else, please ensure that cIRcle staff have received the non-exclusive distribution license from the person(s) holding the rights to the submission.

Congratulations! You have now completed your cIRcle submission!

An automated "cIRcle: You have a new task" email message is sent once a submission has been completed. Either the collections administrator or an authorized reviewer (aka coordinator) will review your cIRcle submission and add it to the cIRcle database. After addition to the database, you will receive an automated email containing the URL of your submission.

To exit cIRcle, click on **"Logout"** in the left sidebar under "My Account".

TIP! To start another submission, click on the **"Submit another item"** *on this page. Or, you may click on* **"Submissions"** *under "My Account" in the left sidebar to return to your "Submission & workflow tasks" page.*

Last updated January 5ᵗʰ, 2011.