

TIP: Words in italics are included in the *RADR Quick Guide: Glossary*.

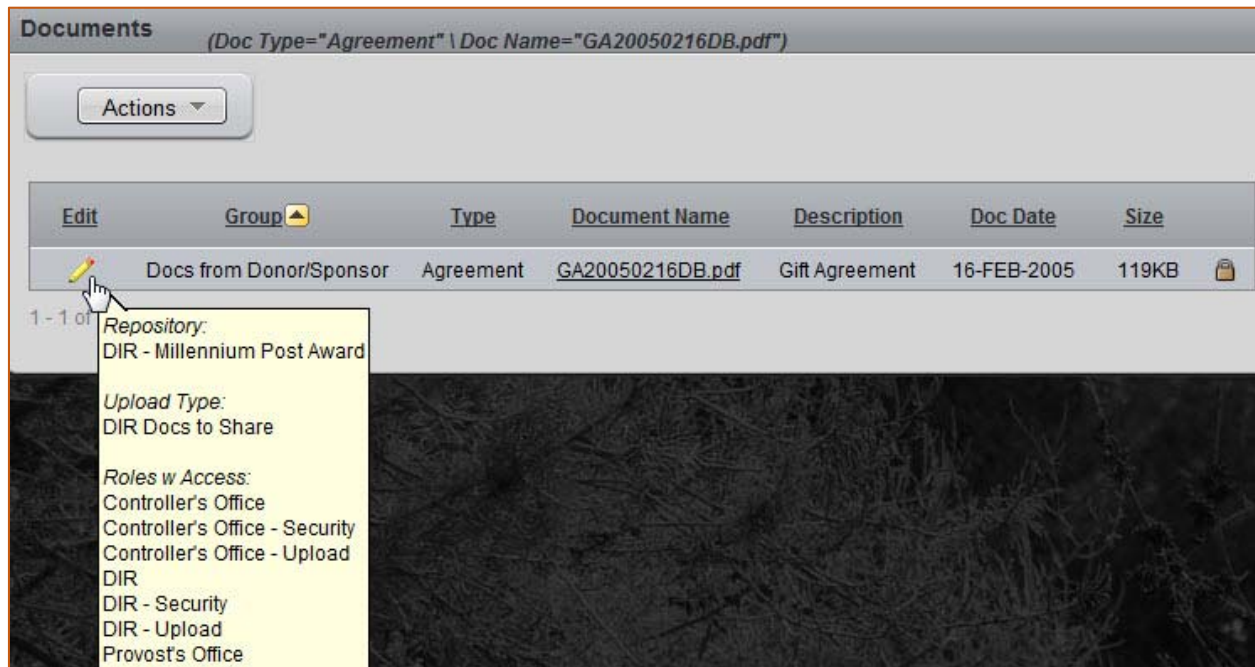
Overview

When a document is uploaded information must be associated with the document. This information is called *metadata*. This metadata is used to determine a user’s access to the document, what search terms can be used to search for the document, and how the document will be organized within search results. In RADR the metadata that is used to derive search terms and access are called *Primary Links*.

For more information about Primary Links please see the *Quick Guide: Understanding Primary Links*.



Access to Metadata

In order to add, modify, or delete a document’s metadata you must have a RADR *Role* that grants access to the *Upload Type* used to upload the document. To quickly check to see if a document in your search results is one in which you can modify the metadata hover over the *Edit* icon. When you hover over the *Edit* icon a note will appear that identifies the document’s *Repository*, *Upload Type*, and the RADR *Roles* that have access to view the document.



Metadata

To edit metadata, including adding, modifying, or deleting a primary link, click on the document’s *Edit* icon in your search results.

Edit	Group ▲	Type	Document Name	Description	Doc Date	Size
	Docs from Donor/Sponsor	Agreement	FA19780101HWPB.pdf	Fund agreement.	01-JAN-1978	3,730KB 

If you have the appropriate access to edit the document’s metadata you will be able to modify the following:

- Document Name
 - NOTE:** A document name MUST have the file extension (e.g., .doc, .docx, .pdf) at the end of the name. If you do not include a file extension RADR will automatically add it to the entered Document Name when you Apply Changes.
- Description
- Document Group
- Document Type
- Document Date
- Access (Confidential or Non-Confidential)
- Primary Links

The following metadata cannot be updated as the data is populated by RADR:

- Size (of document)
- Repository (can only be changed by changing the *Upload Type*)
- Upload Date
- Uploaded By
- Last Update Date
- Last Updated By

Document

Upload Type: DIR Docs to Share

Document File: [Download](#)

Document Name:

Description:

Document Group:

Document Type:

Size: 4 MB

Repository: DIR - Millennium Post Award

Upload Date: 11-DEC-2013

Uploaded By: Condou, Steven G (Steve)

Last Update Date: 11-DEC-2013

Last Updated By: Condou, Steven G (Steve)

Document Date:

Access: Confidential
 Non-Confidential

Primary Link

Millennium ID

Derived Search Terms

Search	Value
Donor Name	Horace W. and Vicki S. Baker Fund for the Caltech Y

Editing Primary Links

Primary Links are associated with documents as a way to derive both search terms and user access.

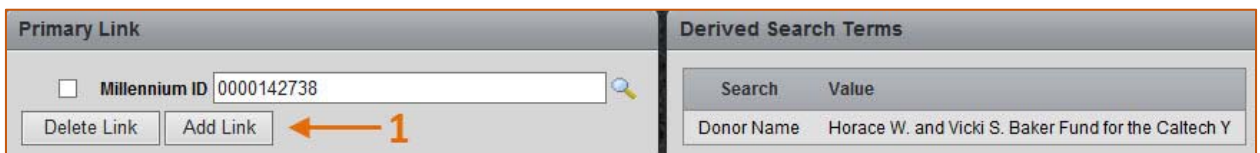
More than one link can be associated with a single document. For example, if the document is backup for a cost transfer, then both Award-Project combinations associated with the cost transfer can be linked to the document. In addition, a document can be linked to more than one type of link, for example, both an Oracle Award Number and a Millennium ID.

Some links are used for search purposes only, while *Primary Links* derive additional search terms and account-level security.

Adding a Link

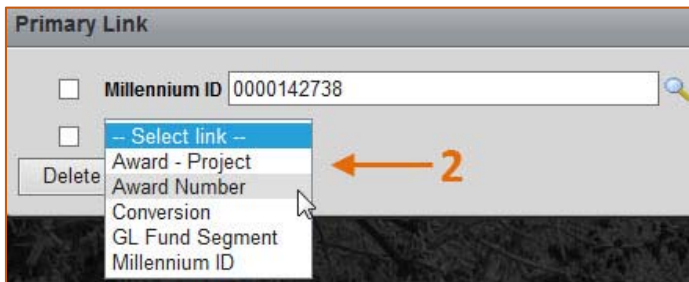
To add a link:

1. Click on the *Add Link* button in the Primary Links section, which will activate the *Select Link* list of values.



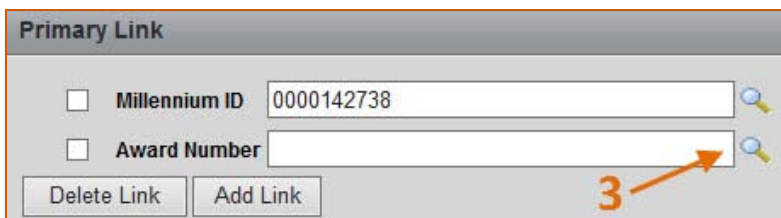
2. Select the appropriate link.

NOTE: Types of links available are associated with the *Upload Type*.



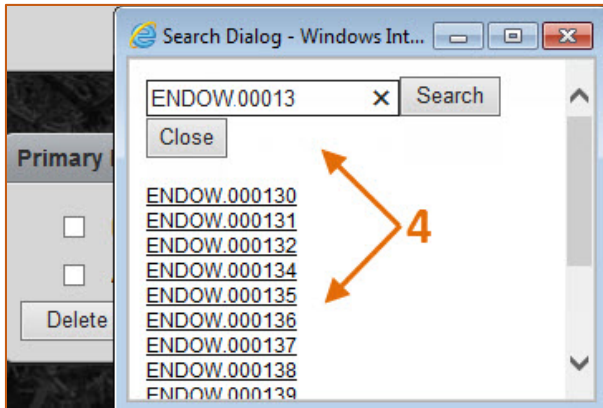
3. Click on the *Search* icon to open up a search window to find the appropriate value.

NOTE: The value entered for a Primary Link **MUST** be entered **EXACTLY** as it is entered in the source system (e.g., Oracle Grants Accounting).

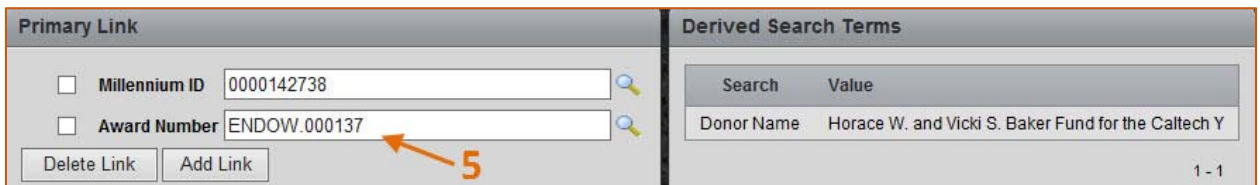


4. Enter your search term, click on the *Search* button, and click to select the appropriate link from the search results.

NOTE: You do not need to enter a wildcard (%) on this search window.



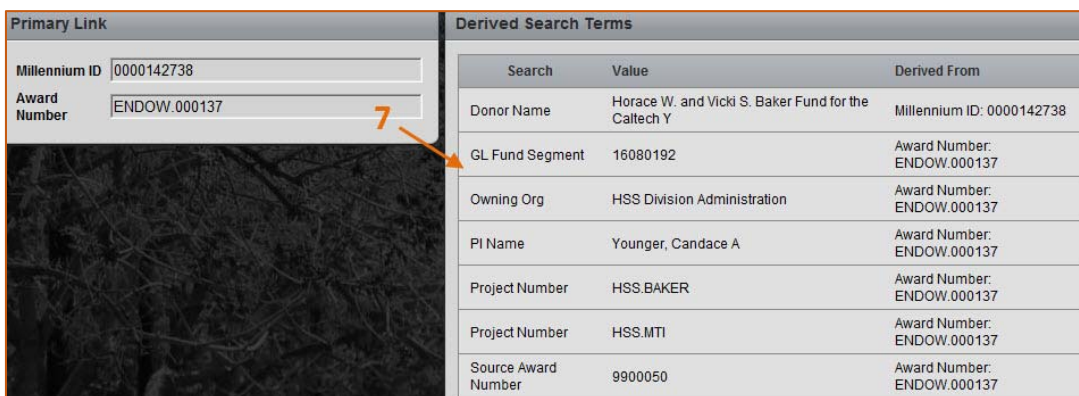
5. The link will automatically appear in the Link field.



6. To save you Link entry click on the *Apply Changes* at the top of the form.



7. Once you *Apply Changes* the derived search terms will be associated with your document.



Modifying a Link

To modify a link:

1. Click on the *Search* icon.
2. Choose a new value.
3. Click on the *Apply Changes* button at the top of the form.

Deleting a Link

To delete a link:

1. Select the link you would like to delete by checking on the box next to the Link.
2. Click on the *Delete Link* button.
3. Click on the *Apply Changes* button at the top of the form.

NOTE: If you need to both *Delete* a link and *Add* a link *Apply Changes* after one action and before the other.