

IEEE eCF Management Toolkit
Volunteer User Guide
Version 1.2

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Introduction

This document and the respective tools have been developed to guide publications volunteers and staff who use the IEEE eCF Management Toolkit (eCF MT) and to . It will explain the functions of the tool and how to best use the tool to invite authors to complete their publication agreements (eCF Invitation Generator), check reports to see whether agreements have been completed (Search Copyright), and upload PDFs of specific agreements (PDF Upload).

- IEEE eCF Management Toolkit (eCF MT) (formerly, the eCF Administrative Tool for Volunteers)
- eCF Invitation Generator (formerly, eCF Upload Tool)
- Search Copyright (formerly, eCF Report Tool)
- PDF Upload (formerly, Paper Upload Tool)
- eCF Author Wizard (define, explain)

1. Getting Started

- Users must have an [IEEE Account](#) and be approved by an eCF MT Admin (IPR Office) in order to login.
- If you need an IEEE Account, click [here](#).
- If you need to apply for the eCF MT, [click here](#).
- Each publication must be [registered here](#).
- Once you receive email confirmation that your form has been processed, you can sign in to begin.



The IEEE eCF Management Toolkit is available to IEEE Volunteers and Staff who are responsible for collecting and monitoring IEEE Copyright Forms from authors for their publications.

For technical assistance or to search our knowledge base, please visit our [support site](#)

IEEE eCF Management Toolkit

[Sign In](#)

Sign up to use the tools [Here](#)

Sign up for an IEEE Account Email Address [Here](#)

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2. Searching Copyright Forms (formerly, eCF Report Tool)

- Once logged in, the user will land on the Copyright Form Search page
Note: waiting for landing page instructions to be developed
- The purpose of the search page is to search the database for eCF Records, both completed (signed) and pending (unsigned)
- **To view a report for an entire publication, choose the title of the publication from the drop down list and click search.**
- **To search for a specific paper, choose the title of the publication from the drop down list and enter the full or part of the title in the paper title field.**
- The search function defaults to show all forms, whether they are pending (awaiting completion) or completed. The results can be filtered using the radial buttons on the right.
- **The date range will automatically be set to view forms completed in the last 365 days. If you need to search for an older record, you may adjust the date range.**

Include zoom in shot of drop down bar when available.

3. Copyright Form Search Results

- After clicking the search button on the Copyright Form Search page, the user will land on the Copyright Form Search Results page.
- The purpose of this page is to show the user entries that match the search criteria determined on the previous page.

- Clicking the underlined “Original Copyright” text in each completed entry will download a copy of the form as initially signed by the author.
- **To download a report from the results in Excel format, click “Export to Excel”**
- Clicking “Back to top” will return the user back to the top of the “Copyright Form Search” page.

4. eCF Invitation Generator

The IEEE Electronic Copyright Form Invitation Generator provides publication volunteers and staff with a simple way of inviting authors to complete their IEEE Electronic Copyright Forms.

Before using the tool, please make sure that you have [registered your publication](#). Follow the directions on the right in order to easily issue copyright from invitations to the authors submitting to your publication.

1. To begin, download the [eCF Upload Spreadsheet Template](#)
2. Next, prepare the spreadsheet template by inputting author names, paper titles and corresponding author email address.
3. Once the spreadsheet is complete, choose the corresponding publication from the dropdown list below, select “Choose File” and upload the prepared file.

Please Note: The system may take up to four hours to send eCF Invitations.

Publication Title *

Choose File No file chosen

Upload

- Clicking the “**eCF Invitation Generator**” tab at the top of the static menu will open the eCF Invitation Generator page.
- This page allows the user to engage the eCF Invitation Generator to invite specified authors to access the eCF author wizard to complete their publishing agreements.
- To upload a spreadsheet and initiate eCF Invitations, begin by selecting the appropriate Publication Title from the drop down list.
- Click “Choose File” and select the excel spreadsheet containing the author/paper information and click the “Upload” button.
- Invitations will be processed and sent within four hours.

5. PDF Copyright Upload

IEEE Electronic Copyright Form Search Copyright eCF Invitation Generator PDF Upload Welcome d.masters+r1@ieee.org

PDF Copyright Upload

The PDF Copyright Upload Tool allows for situations and scenarios where the standard IEEE Electronic Copyright Form cannot be completed.

These forms are usually instances of specific agreements that have been previously accepted by IEEE.

If the Article ID is not specified, a random one will be generated.

Please contact us at ecopyright@ieee.org regarding the status or acceptance of an IEEE agreement.

Required field *

Paper Title *

Author Names (comma seperated) *

Your Email *

Consent to AV Recording Yes

Article Id

Publication Title *

Copyright Type * Standard IEEE Copyright Transfer

Choose File* N...

Upload Paper Copyright

- Clicking the “**PDF Copyright Upload**” tab at the top of the static menu will open the eCF Invitation Generator page.
- This page allows the user to upload a PDF of a publishing agreement in order to suffice as an eCF in the database.
 - NOTE: This should be used only in unique scenarios where the Electronic Copyright Form will not suffice.
 - **DO NOT** collect and upload PDFs in instances where eCF can be collected.
- The fields marked with the red asterisk are required.
- The Article IDs must be unique within the selected publication.
- Select “Copyright Type” that best represents the uploaded form.
- Choose File to upload
- Click “Upload Paper Copyright”