Administrator Guide

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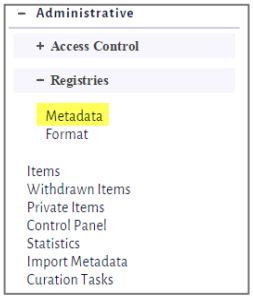
A. Web Interface End:

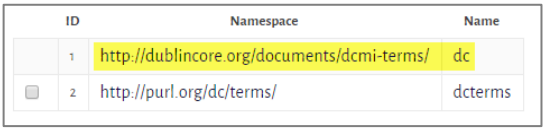
- **Add new Metadata Field**

1. Login as a DSpace Administrator and visit the DSpace Administration user interface (Administrative at the right side)

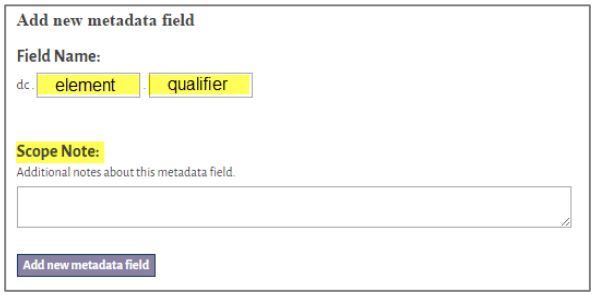


2. Click on the "Metadata Registries" in order to see all current metadata schemas within DSpace

3. Then, click on the namespace of the schema to add a field to that particular schema. In our case click on the dc namespace



4. At the bottom of the page, you will find the Add Metadata Field form, where you can specify an "element", "qualifier", and "scope note" for the new metadata field. Only the "element" is required. Click "Add New" to add the new field.

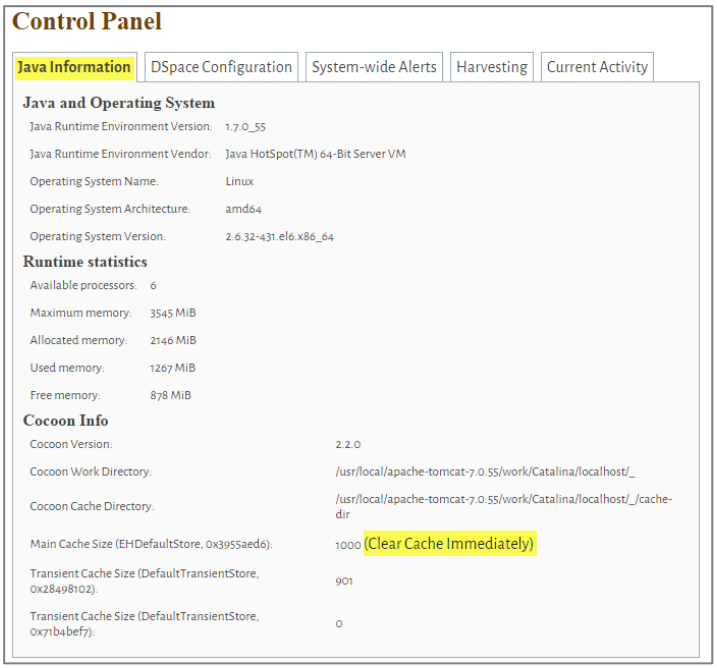


5. The new metadata field is now added to the underlying database as a member of the current metadata schema.

- **Clear Cocoon (XMLUI) Cache**

There is a convenient link in XMLUI to clear the cache without restarting the servlet container, as following:

1. Log in as DSpace administrator and visit the DSpace Administration user interface (Administrative at the right side)
2. Click on "Control Panel" in the sidebar menu
3. Click on the "Java Information" tab.
4. Click on the "Clear Cache Immediately" link

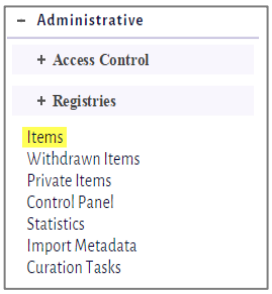


In some case, clearing cache from the interface is not enough. If you clear the cache from the interface and still you are not able to see your applied changes then you have to clear the cache manually by shutting down Tomcat, deleting the cache directory and then restarting Tomcat, as following:

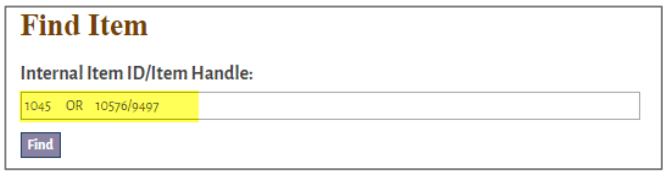
1. /usr/local/apache-tomcat-7.0.55/bin/shutdown.sh
2. cd /usr/local/apache-tomcat-7.0.55/work
3. rm –r Catalina
4. /usr/local/apache-tomcat-7.0.55/bin/startup.sh

- ## Search Specific Items

Admins can search items from the Administrative interface by using its handle, or internal ID.



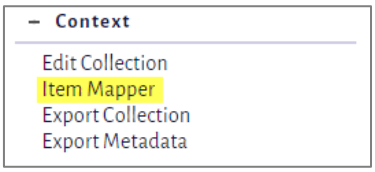
1. Log in as DSpace administrator and Go to Administer >> Items.
2. Enter the Handle or internal item ID of the item you want to edit or delete.



- ## Map Items

If you want one item to appear in two different collections simultaneously, without having to re-submit it again to appear in the second collection. Dspace provide a tool for this purpose to map items between collections. Mapped items appear in the second collection but do not exist in the second collection.

1. Go to the Collection to which you want to map the item.
2. Under Context , click on Item Mapper.

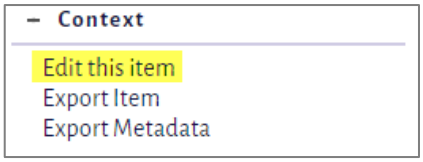


3. Search items in the repository and map them to the collection.

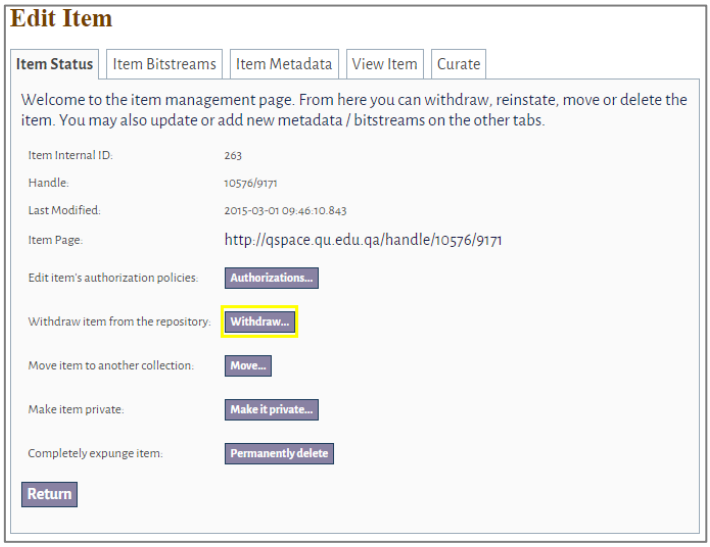
- **Withdraw Items**

This feature to withdraw an item from the archive, but does not delete it.

1. Search for the item you would like to withdraw.
2. Under *Context* , click on *Edit this Item*



3. Optional: you can add a description.provenance metadata field to the registry of that item, explaining the reason for withdrawal for future reference. Update the record.
4. Click on Withdraw. Confirm the withdrawal.

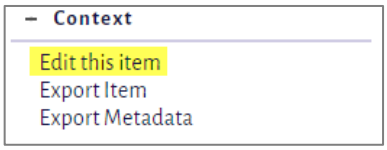


Note: Withdrawn items can be restored**.** To This reinstates an item that has previously been withdrawn, click on "reinstate" under Edit Item > Item Status tab.

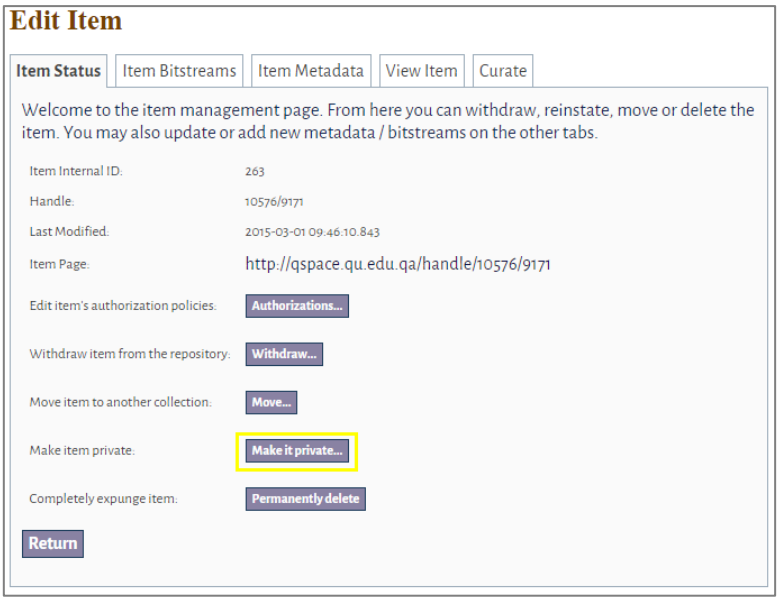
- **Private Items**

This state should only refer to the discoverable nature of the item. A private item will not be included in any system that aims to help users to find items. So it will not appear in (Browse, Search results, recent submissions)

1. Search for the item you would like to make it private.
2. Under *Context* , click on *Edit this Item*



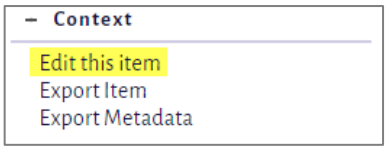
3. Click on private. Confirm to make it private



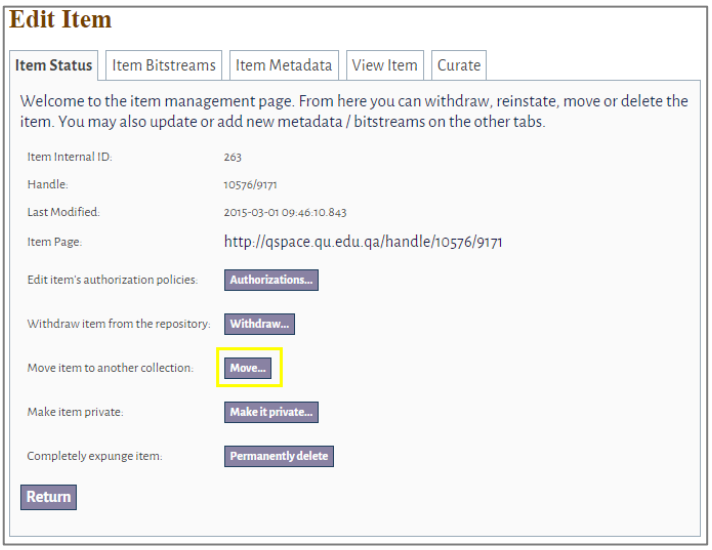
- **Move Items**

This feature to move an item to another *Collection* if its submitted to an incorrect *Collection*

1. Search for the item you would like to move.
2. Under *Context* , click on *Edit this Item*



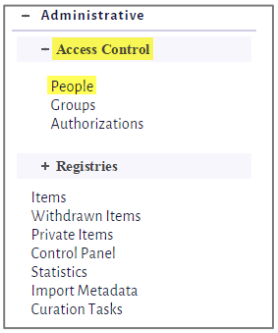
3. Click on move.

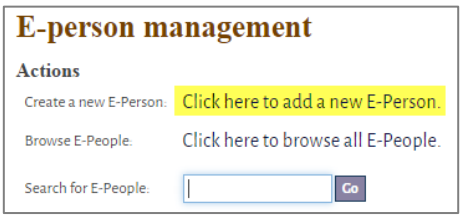


4. Select the collection you wish to move this item to, and then click move.

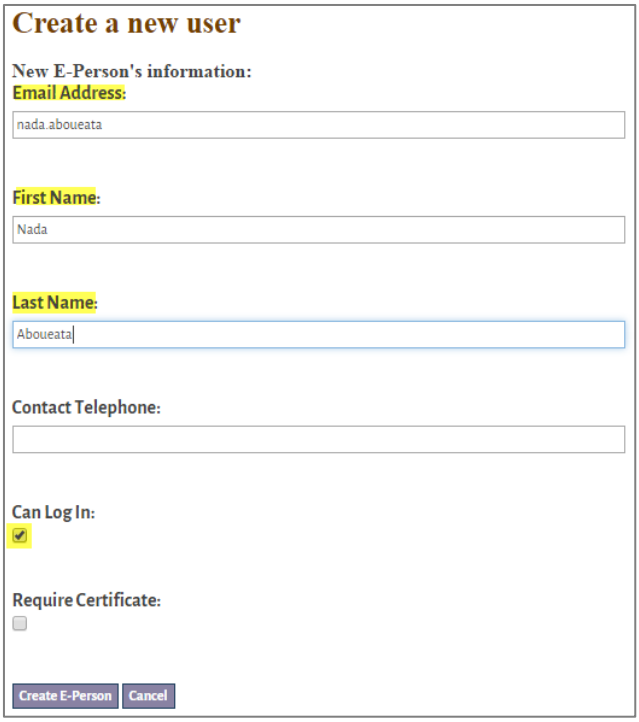
- **E-person Management**
  - ***Create e-person***

1. Login as a DSpace Administrator and visit the DSpace Administration user interface (Administrative at the right side)
2. Under Administrative > "Access Control". Click on People link
3. This will take you to E-person Management page.
4. Click on "Click here to add a new E-Person."

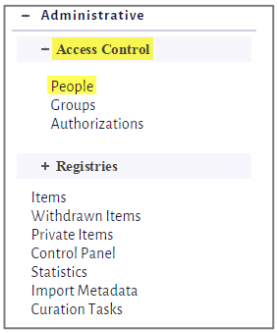




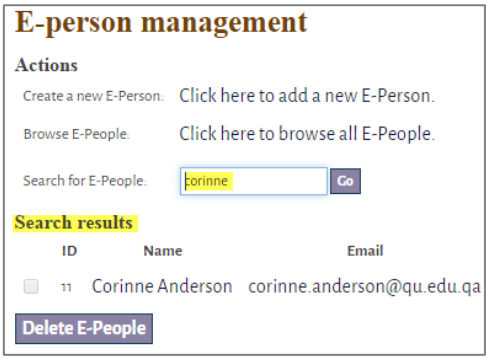
5. This will redirect you to a form. Fill up the form details, check Can log in and hit save.



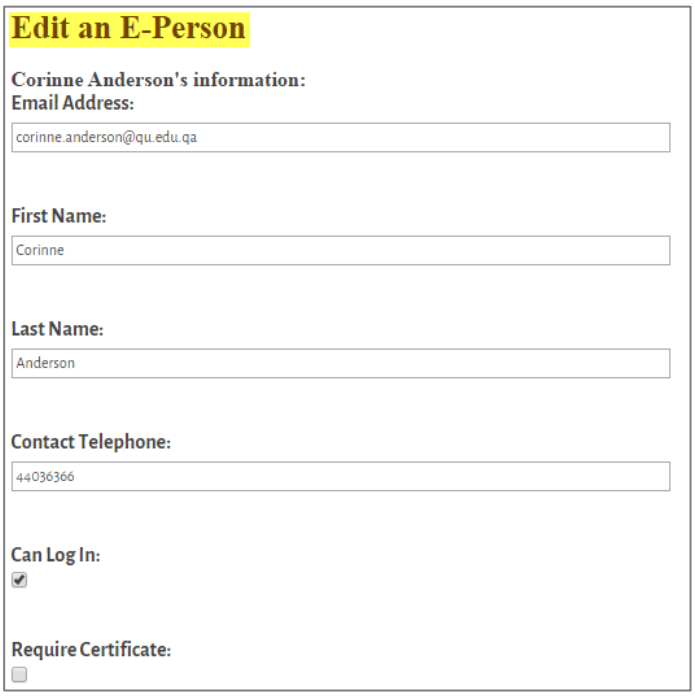
- ***Edit/Delete E-person***



1. Login as a DSpace Administrator and visit the DSpace Administration user interface (Administrative at the right side)
2. Under Administrative > "Access Control". Click on People link
3. This will take you to E-person Management page.
4. Search for e-person you would like to Edit/Delete.

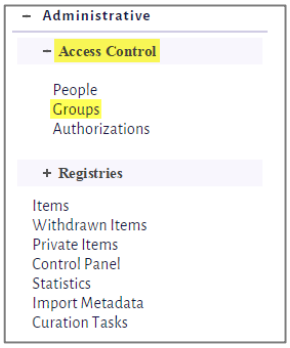


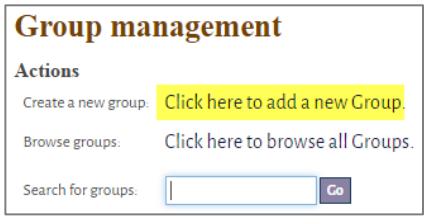
5. Then edit/delete it.



- **Groups Management**
  - ***Add new Group***

1. Login as a DSpace Administrator and visit the DSpace Administration user interface (Administrative at the right side)
2. Under Administrative > "Access Control". Click on Groups link
3. This will take you to Groups Management page.
4. Click on "Click here to add new group"

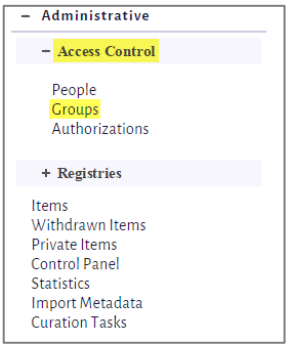




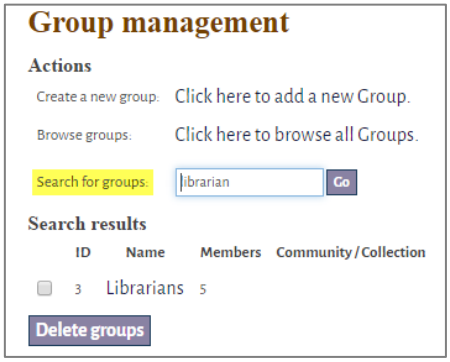
5. In the first box, next to "Change group name:" type in the name of this group.
6. In the second box, next to "Search members to add:" you can search for users or groups.
   - ✓ To search for a user, type in a portion of the user name you'd like to add to this group and then click on "E-People…"
   - ✓ To search for a group, type in a portion of the group name you'd like to add to this group and then click on "Groups…"

7. Click the "Add" button to the right of the user name or group you'd like to add to this new group, and then hit save.

- ***Edit Existing Group***



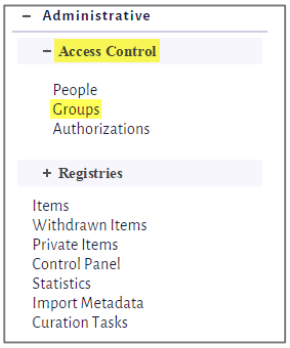
1. Login as a DSpace Administrator and visit the DSpace Administration user interface (Administrative at the right side)
2. Under Administrative > "Access Control". Click on Groups link
3. This will take you to Groups Management page.
4. Search for the group you would like to edit, and click on the group.



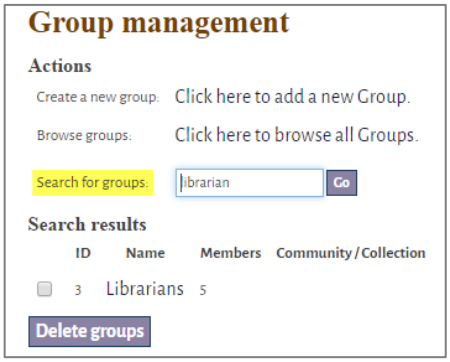
5. This will redirect you to the group editor page. Where you change the Group Name, add new members (Groups, E-persons), delete members.

6. After making all desired changes to group, click on "Save."

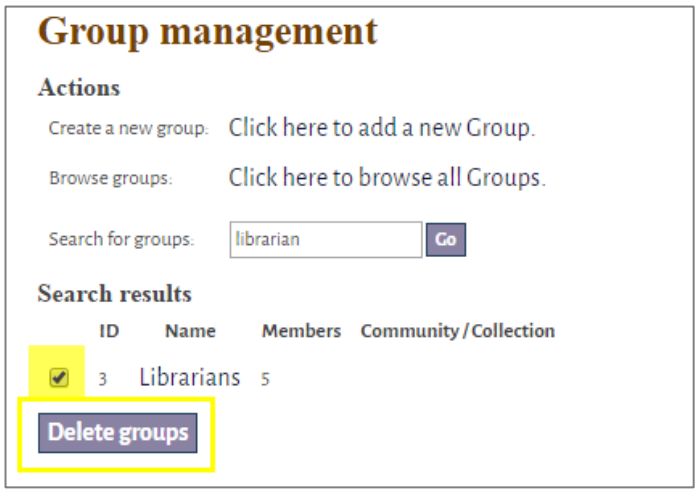
- ***Delete Existing Group***



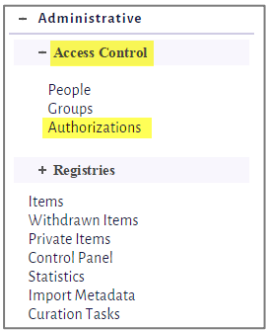
1. Login as a DSpace Administrator and visit the DSpace Administration user interface (Administrative at the right side)
2. Under Administrative > "Access Control". Click on Groups link
3. This will take you to Groups Management page.
4. Search for the group you would like to delete



5. Click on "Delete" to confirm the deletion or "Cancel" to return to the Group management



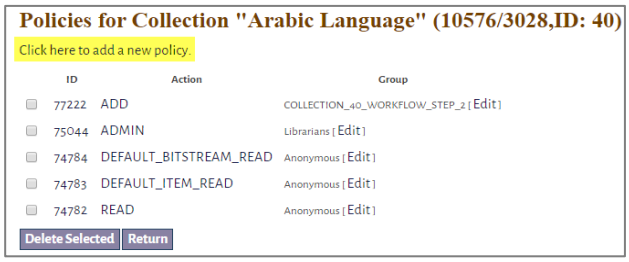
- **Items, Community, and Collection Authorization Management**



To edit the policies of items, communities and collections:

1. Login as a DSpace Administrator and visit the DSpace Administration user interface (Administrative at the right side)
2. Under Administrative > "Access Control". Click on Authorization link
3. This will take you to Administer Authorization Policies page.
4. To add a new policy, Find the item (by its internal ID or the handle) or click on the community or collection to edit its policies.

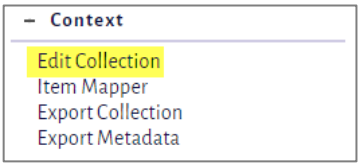
5. Click on "Click here to add a new policy."



6. Select the action you would like to add (Add, Remove, Write, Read, Admin …. Etc)
7. Select the group that contains the users who need the permission, and then hit save.

- ## Managing Collection Workflow Authorization

1. Login as a DSpace Administrator and visit the DSpace Administration user interface (Administrative at the right side)
2. Go to the collection you want to edit its authorization.
3. At the right side bar, Navigate to Context > Edit Collection.
4. This takes you to the administrative page for the collection. Click on the "Assign Roles"
5. At this tab, you will see six possible workflows roles with their description. From this tab you can create groups with the designated role, edit or delete existing permission groups.



a. Create Groups with the designated role

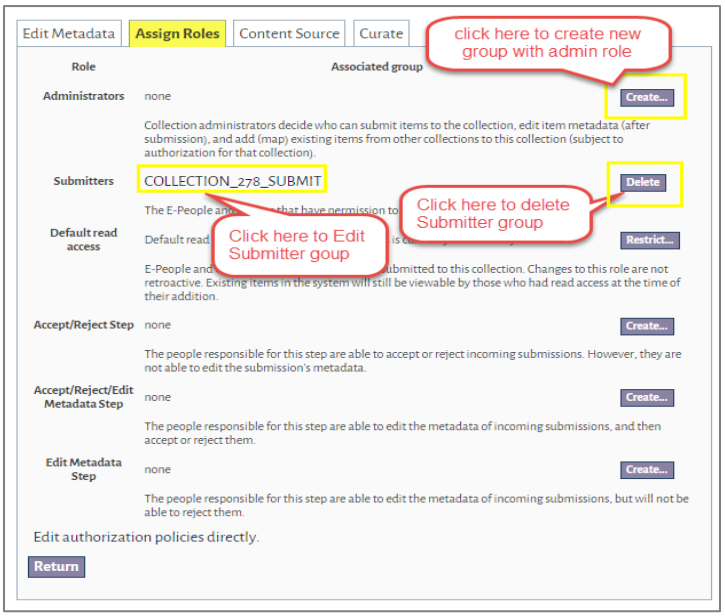
To create groups, click on create button next to the role you want to add and this will redirect you to the Group Editor page where you can add members to the group as described above.

b. Edit existing permission Groups

To edit groups, click on the name of groups you want to edit and this will redirect you to the Group Editor page where you can add/delete members as described above.

c. Delete existing permission Groups

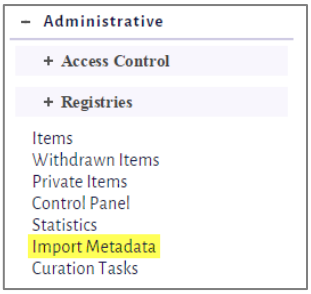
To delete existing permission groups, click on delete button next to the group you want to delete. Then click delete to Confirm deletion or cancel to return back to the administrative page for the collection.



- ## Export and Imports

  - ### *Import Items Metadata*

    Batch metadata imports (from CSV) can be performed from the Administrative menu:

    1. Login as a DSpace Administrator and visit the DSpace Administration user interface (Administrative at the right side bar)
    2. Click on Import metadata link
    3. Upload your CSV File
    4. After uploading the CSV, you will be presented with a summary of all changes that will be performed in the system. You can review these changes and choose whether to apply them or cancel.

  - ### *Export*

    #### a. Export DSpace Objects (Community, Collection or Items)

    DSpace export "DSpace objects" in a simple archive format. The basic concept behind the DSpace simple archive format is to create an archive, which is directory full of items, with a subdirectory per item. Each item directory contains a file for the item's descriptive metadata, and the files that make up the item.

    archive_directory/

    item_000/

    dublin_core.xml -- qualified Dublin Core metadata for metadata fields belonging to the dc schema

    metadata_[prefix].xml -- metadata in another schema, the prefix is the name of the schema as registered with the metadata registry

    contents -- text file containing one line per filename

    file_1.doc -- files to be added as bitstreams to the item

    file_2.pdf

    item_001/

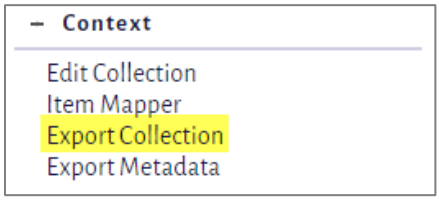
    dublin_core.xml

    contents

    file_1.png

To Export:

1. Login as a DSpace Administrator
2. Navigate to the object (community, collection or item) you want to export.
3. visit the Context at the right side bar
4. Click on Export **Object** (Community, Collection , or Item) Link

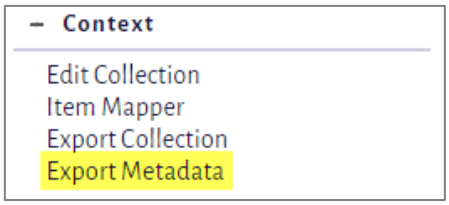


5. Dspace will export the requested object in a simple archive format as zip folder.

b. Export Metadata

DSpace can export the dspace objects metadata in a CSV File format.

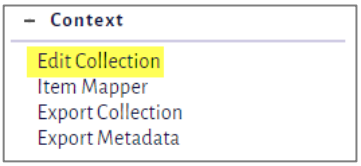
1. Login as a DSpace Administrator.
2. Navigate to the object (community, collection or item) you want to export.
3. visit the Context at the right side bar
4. Click on Export Metadata Link



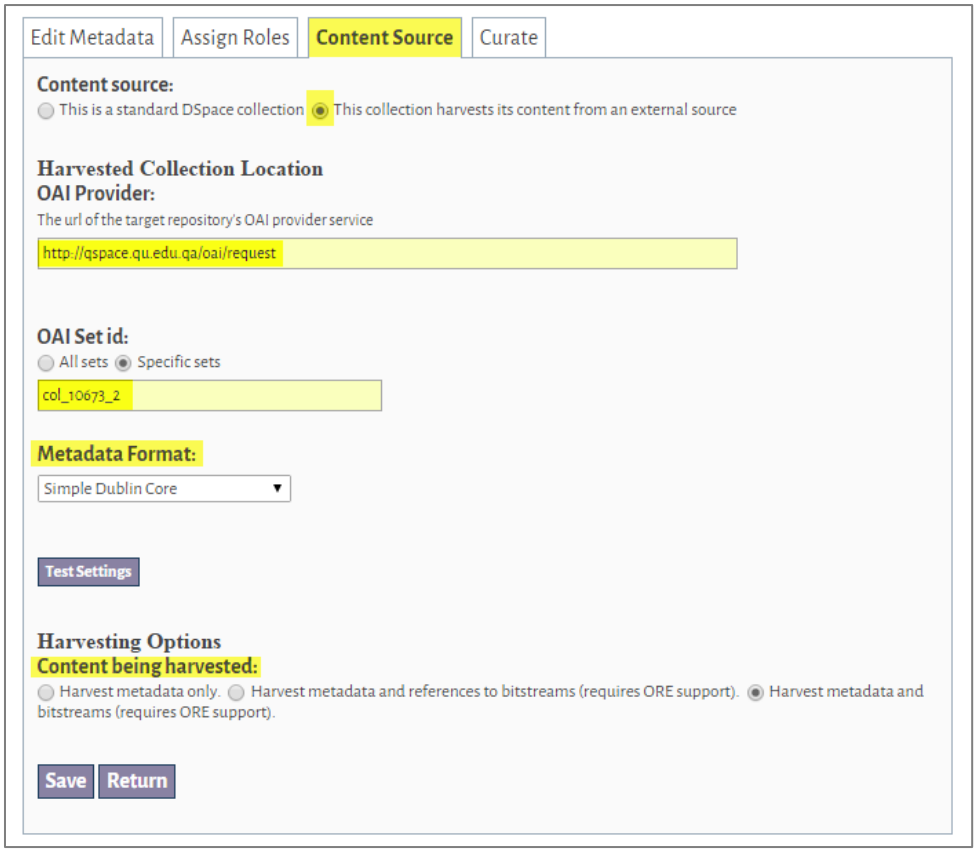
5. DSpace will export the requested object in a CSV File Format.

- ## Harvesting from external Institutional Repositories

1. Login as a DSpace Administrator
2. Go to the collection you want to harvest its content from an external source.
3. At the right side bar, Navigate to Context > Edit Collection



4. Click on Content Source tab
5. At this tab, check the option “This collection harvests its content from an external source”
6. Enter the The url of the target repository's OAI provider service (ex: http://qspace.qu.edu.qa/oai/request).
7. Enter the OAI set id you want to harvest (ex: col_10576_123) .
8. Choose the Metadata format.
9. Choose the contents being harvested.
10. Click on save, then Click on Import now.



B. Server End

- ### Change Page Text

To change the string displayed to the user:

1. Locate the "/usr/local/dspace/ webapps/xmlui/i18n/messages.xml".
2. Search for the text you want to change and change it.

- ### Add Text to a page

  - ✓ Locate the "/usr/local/dspace/ webapps/xmlui/i18n/messages.xml".
  - ✓ Add your message with the new key to the messages catalog

<message key="xmlui.yourtheme.mynewkey">Text of my new key!</message>;

  - ✓ To add your new message to the desired xsl template, add <i18:text> element where you would like the new text to appear. Make sure the value of the key is unique, for example: <i18n:text> xmlui.yourtheme.mynewkey </i18n:text>

- ### Retrieve deleted Bitstream from DataBase

If you delete any bitstream by mistake on dspace, you can retrieve it from the assetstore only within the month you deleted the bitstream in. For example if you delete it during January, then you can retrieve it anytime during January only, which is not the case with the next month. The reason behind this, is having a monthly cron job that cleanup the database at the first day of every month. So the bistream you deleted during January won't be available next month in the assestore.

Query used to retrieve the Bitstream:

Select * from bitstream where name='File name';

This query will return the details about the deleted bitstream. From the Internal ID of the bitstream, you can locate the bitstream path in the assetstore.

For Example:

Internal Id: 60174422546363678298208298 2

Path of Bistream with the above Internal id is : 60/17/44

- **Import and Export using Command Line**
  - ***Simple Achieve Format Technique***

a. Export Collection

Command Used	[dspace]/bin/dspace export
-t or --type	Type of export. *COLLECTION* will inform the program you want the whole collection. *ITEM* will be only the specific item. (You will actually key in the keywords in all caps. See examples below.)
-i or --id	The ID or Handle of the Collection or Item to export.
-d or –dest	The destination of where you want the file of items to be placed. You place the path if necessary.
-m or –migrate	Export the item/collection for migration. This will remove the handle and metadata that will be re-created in the new instance of DSpace.

Command : [dspace]/bin/dspace export -t COLLECTION -i collID -d dest_dir –n seq_number

b. Import Collection

Command Used	[dspace]/bin/dspace import
-a or --add	Add items to DSpace
-s or --source	Source directory where your zipfile containing the items resides
-c or –collection	Destination Collection by their Handle or database ID
-z or –zip	Name of the zip file

[dspace]/bin/dspace import -a -e joe@user.com -c CollectionID -s items_dir -z filename.zip -m mapfile

- ***Archive Information Package Technique***

  - ✓ Collection Level

    a. Export Collection

```
Command : [dspace]/bin/dspace packager –d -a -t AIP -e <eperson> -i <Coll handle> <file-path>
```

    b. Import Collection

```
Command : [dspace]/bin/dspace packager –r –a -t AIP -e <eperson> -i <Coll handle> <file-path>
```

  - ✓ Site Level

    a. Export Entire Site

```
Command : [dspace]/bin/dspace packager –d -a -t AIP -e <eperson> -i <sitePrefix/0> site-aip.zip
```

    b. Import Entire Site

```
Command : [dspace]/bin/dspace packager -r -a -t AIP -e <eperson> -i <site-handle-prefix>/0 FullPath-site-aip.zip
```

Restore AIP Hierarchy (-r -a option) – when restoring, we make every attempt to restore the object (with all child objects) as it used to be. This also attempts to restore all handles and relationships.

- ## Customize Search Filters & Discovery sidebar facets

To add metadata fields to appear as both search filter and sidebar facet, follow the following steps:

1. Locate (/usr/local/dspace-src/dspace/config/spring/api/discovery.xml)
   Add the search filters bean to the configurations bean

```
<!--Search filter configuration beans-->
    <bean id="searchFilterType" class="org.dspace.discovery.configuration.DiscoverySearchFilterFacet">
    <property name="indexFieldName" value="type"/>
    <property name="metadataFields">
        <list>
            <value>dc.type</value>
        </list>
    </property>
    <property name="facetLimit" value="10"/>
    <property name="sortOrder" value="COUNT"/>
</bean>
```

2. Add discovery sidebar facet and search filter to the search filters under the default configuration settings for discovery

3. Add discovery sidebar facet and search filter under the Homepage specific configuration settings for discovery

```
<!--The default configuration settings for discovery-->
<bean id="defaultConfiguration" class="org.dspace.discovery.configuration.DiscoveryConfiguration" scope="prototype">
    <!--Which sidebar facets are to be displayed-->
    <property name="sidebarFacets">
        <list>
            <ref bean="searchFilterAuthor" />
            <ref bean="searchFilterType" />
            <ref bean="searchFilterSubject" />
            <ref bean="searchFilterIssued" />
        </list>
    </property>
    <!--The search filters which can be used on the discovery search page-->
    <property name="searchFilters">
        <list>
            <ref bean="searchFilterTitle" />
            <ref bean="searchFilterType" />
            <ref bean="searchFilterAuthor" />
            <ref bean="searchFilterSubject" />
            <ref bean="searchFilterIssued" />
        </list>
    </property>
```

4. Edit Search Indexed fields in (/usr/local/dspace/config/dspace.cfg) to include the metadata fields you added to the discovery facet and search filters.

search.index.[number] = [search field]:element.qualifier

5. Edit the (/usr/local/dspace/webapps/xmlui/WEB-INF/classes/aspects/Discovery/i18n/messages.xml) To add the following messages:

```
<message key=” xmlui.ArtifactBrowser.SimpleSearch.filter.type_type”> Type</message>

<message key="xmlui.ArtifactBrowser.AdvancedSearch.type_type">Type</message>

<message key="xmlui.ArtifactBrowser.SimpleSearch.filter.type">Type</message>
```

Note: the above messages as an example for Type metadata.

6. Restart tomcat
7. run ./dspace index-discovery –b
8. Clear Cocoon Cache

- ## Customize Search Filters

To configure a search filter that is **not** used as a sidebar facet, Follow the following steps:

1. Locate (/usr/local/dspace-src/dspace/config/spring/api/discovery.xml)
2. Add the search filters bean to the configurations bean with **DiscoverySearchFilter** class

```
<bean id="searchFilterPublihser" class="org.dspace.discovery.configuration.DiscoverySearchFilter">
    <property name="indexFieldName" value="publisher"/>
    <property name="metadataFields">
        <list>
            <value>dc.publisher</value>
        </list>
    </property>
</bean>
```

3. Add the search filter to the default configuration settings for discovery
4. Add the search filter to the Homepage specific configuration settings for discovery

```
<!--The default configuration settings for discovery-->
<bean id="defaultConfiguration" class="org.dspace.discovery.configuration.DiscoveryConfiguration" scope="prototype">
    <!--Which sidebar facets are to be displayed-->
    <property name="sidebarFacets">
        <list>
            <ref bean="searchFilterAuthor" />
            <ref bean="searchFilterType" />
            <ref bean="searchFilterSubject" />
            <ref bean="searchFilterIssued" />
        </list>
    </property>
    <!--The search filters which can be used on the discovery search page-->
    <property name="searchFilters">
        <list>
            <ref bean="searchFilterTitle" />
            <ref bean="searchFilterType" />
            <ref bean="searchFilterAuthor" />
            <ref bean="searchFilterSubject" />
            <ref bean="searchFilterIssued" />
            <ref bean="searchFilterPublihser" />
        </list>
    </property>
```

5. Edit Search Indexed fields in (/usr/local/dspace/config/dspace.cfg) to include the metadata fields you added to the search filters.

search.index.[number] = [search field]:element.qualifier

6. Edit the (/usr/local/dspace/webapps/xmlui/WEB-INF/classes/aspects/Discovery/i18n/messages.xml) To add the following messages:

```
<message key=" xmlui.ArtifactBrowser.SimpleSearch.filter.type_ publisher"> Publisher </message>
<message key="xmlui.ArtifactBrowser.AdvancedSearch.type_ publisher "> Publisher </message>
<message key="xmlui.ArtifactBrowser.SimpleSearch.filter.publisher"> Publisher </message>
```

Note: the above messages as an example for Publisher metadata.

7. Restart tomcat
8. run ./dspace index-discovery –b
9. Clear Cocoon Cache

- **Customize Browse Filters**

1. Edit browse Indexes fields in (/usr/local/dspace/config/dspace.cfg) to include the metadata fields you want to add to the browse fields.

2. Edit Search Indexed fields in (/usr/local/dspace/config/dspace.cfg) to include the metadata fields you added to the browse fields.

```
search.index.[number] = [search field]:element.qualifier
```

3. Edit the (/usr/local/dspace/webapps/xmlui/i18n/messages.xml) To add the following messages:

```
<message key=" xmlui.ArtifactBrowser.ConfigurableBrowse.type.column_heading"> Type </message>
<message key=" xmlui.ArtifactBrowser.ConfigurableBrowse.title..metadata.type "> Type </message>
<message key=" xmlui.ArtifactBrowser.ConfigurableBrowse.trail.metadata.type ">Browsing by Type</message>
<message key=" xmlui.ArtifactBrowser.Navigation.browse_type "> by Type </message>
```

4. Restart tomcat.
5. Clear Cocoon Cache.

- **Edit Item Submission form**

  - ***Edit Form Input Fields***

1. Locate (/usr/local/dspace/config/input-forms.xml)
2. This XML file contains form definition in the format of <form> element. Each Element contains <page> elements that represent single page of input. Each <page> element contains <field> elements with instructions for creating the fields on that page, as following:

```
<form-definitions>
        <form name=”traditional”>
                <page number=”1”>
                        <field> …..
                        </field>
                </page>
        </form>
</form-definitions>
```

3. The default form has a name attribute whose value is “traditional”. To change all submission forms throughout DSpace, edit the XML inside this form.

4. To change a submission form for a specific collection, add a new <form> element with a new and unique collection-related value for the name attribute. (You can copy the XML from the default and edit as desired, as long as you change the name attribute value.)

5. Edit <page> elements, if needed. Within the page element, edit existing/add <field> elements according to this template

```
<field>
        <dc-schema>dc</dc-schema>
        <dc-element>identifier</dc-element>
        <dc-qualifier>citation</dc-qualifier>
        <repeatable>false</repeatable>
        <label>Citation</label>
        <input-type>onebox</input-type>
        <hint>Enter the standard citation for the
        previously
        issued instance of this item.</hint>
        <required></required>
        <vocabulary></vocabulary>
</field>
```

Notes:

- **<repeatable>** element if its set to "true", then it will create an "Add more" button, which allows you to add multiple values into that particular field.

- **<label>** element contains the label of the input field displayed to the user.

- **<input-type>** element define the field input type . The Valid input types are :
  - “date”
  - “textarea”
  - “name” (two text boxes, labeled last and first name)
  - “onebox” (a one-line textbox)
  - “twobox" (two textboxes on a single line)
  - "dropdown" (for which you must specify a value-pairs-name attribute referring to the <value-pairs> list of allowed values)
  - "qualdrop_value" (a textbox, which is preceded by a "qualifying" dropdown of values. Requires a value-pairs-name attribute, similar to "dropdown". Also requires <repeatable> is set to "true")

- **<hint>** element contains the hint displayed to the submitter about the input field

- **<required>** element contains the textual hint displayed to the submitter about why the field is required.

- **Vocabulary** element is optional. It allows you to specify the controlled vocabulary that this field should select its values from.

6. Restart tomcat.
7. Clear Cocoon Cache.

- ***Edit Form fields Value***

1. Locate (/usr/local/dspace/config/input-forms.xml)
2. Look for the <form-value-pairs> element in input-forms.xml.
3. Look for the <value-pairs> element for the Dublin Core element whose values you wish to change.
4. Add or change a <pair> element, where the <displayed-value> element contains what the submitter sees in the dropdown box, and the <stored-value> element contains what DSpace should archive as the information's label

```
<pair>
        <displayed-value>Gov't Doc #</displayed-value>
        <stored-value>govdoc</stored-value>
</pair>
```

5. Restart tomcat.
6. Clear Cocoon Cache.

- ***Edit Submission form steps***

1. Locate (/usr/local/dspace/config/item-submission.xml)
2. This XML file controls the ordering of the steps used to collect information during item deposit (Default order Describe > Upload > Review > License > Complete).
3. To change the order of the steps, you need only to reorder the <step> elements within the submission process definition.
4. The default submission process has a name attribute whose value is “traditional”. To change all submission forms process throughout DSpace, edit the XML inside this element <submission-process name=”traditional”>.
5. To change a submission form steps for a specific collection, add a new <submission-process > element with a new and unique collection-related value for the name attribute. (You can copy the submission process XML from the default and edit as desired, as long as you change the name attribute value.)
6. Restart tomcat.
7. Clear Cocoon Cache.

- ***Configure File upload step***

To Control whether the upload step is required or not:

1. Locate (/usr/local/dspace/config/dspace.cfg)
2. Search for “webui.submit.upload.required”. If set to 'false', submitter has option to skip the upload step. OTOH, If set to 'true', this make the upload step mandatory and submitter cannot skip it.
3. Restart tomcat.

- **Configure RSS Feeds**

1. Locate (/usr/local/dspace/config/dspace.cfg)

2. You can modify the maximum number of items to display in your RSS feed:

```
webui.feed.items = 4
```

3. To help with performance, you can chose the number of feeds to cache (size) as well as the number of hours to cache a feed (age)

```
webui.feed.cache.sixe= 100
webui.feed.cache.age = 48
```

4. You can also chose the RSS formats you would like to offer a feed in. It's recommended to chose either RSS 1.0 or RSS 2.0 (or both):

```
webui.feed.formats = rss_1.0,rss_2.0
```

5. You need to decide if you want your RSS feed(s) to refer to items via their handle (e.g. http://hdl.handle.net/123456789/1) or via your local DSpace URL. By default, the RSS feed contains an item's handle (specified as false below). But, you can change it to reference your local DSpace URL by setting it to true

```
webui.feed.localresolve = fasle
```

6. You can also customize exactly which metadata fields your RSS feed will display for all items. The information about an item in RSS generally consists of a Title, a Date and a Description. You can map the Title and Date using the following two options:

```
webui.feed.item.title = dc.title
webui.feed.item.date = dc.date.issued
```

7. For the RSS Description, you can actually specify a list of fields (all of which will be displayed as part of the description of an item). The format is the same as mentioned for the RSS Title and Date above, but now you can provide multiple fields separated by commas. (REMEMBER: if you expand this option across multiple lines, you must include a backslash (\) at the end of each continued line, as in the example below)

```
webui.feed.item.description = dc.title, \
dc.contributor.author, dc.contributor.editor, \
dc.description.abstract, dc.description
```

8. Once you've specified all of your feed options, you must restart Tomcat for the changes to take effect.

- **Edit Help and About pages in QSpace**

  To apply any changes to these page. Go to page-structure.xsl to edit the content of the desired page.

- **Edit Policies and Guides files in QSpace**

  To apply any changes to these files. Go to"/usr/local/dspace/webapps/xmlui/themes/QSpace/Policies" OR ""/usr/local/dspace/webapps/xmlui/themes/QSpace/Guides" to apply your changes on the server.

- **Edit Top Navigation bar in QSpace**

  To apply any changes to the top navigation. Go to page-structure.xsl to edit it.

- **Edit displayed item metadata page in QSpace**

  To edit the item view page, Go to

  ""/usr/local/dspace/webapps/xmlui/themes/QSpace/lib//xsl/aspect/artifactbrowser/item-view.xsl" and edit the display template.

- ### Edit the items list in QSpace

  To edit the item list view when get the search results of your query, Go to "“/usr/local/dspace/webapps/xmlui/themes/QSpace/lib//xsl/aspect/artifactbrowser/item-list.xsl” and edit the display template.

- ### Delete items from Solr Statistics Index

  Run the following query:

  wget'http://qspace.qu.edu.qa:8080/solr/statistics/update?stream.body=<update><delete><query>id:10012</query></delete><commit/></update>'