Edit Collection

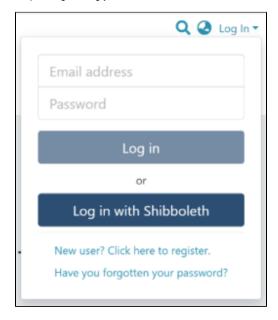
- Audience
- Edit Collection
- Edit Metadata
 - o Template Item
- Assign Roles
- Content Source
- Curate
- Authorizations
- Item Mapper
 - Manage mapped items
 - Map new items

Audience

Repository Administrator Community Administrator Collection Administrator

Edit Collection

Step 1: Login using your credentials

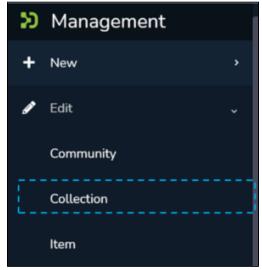


Step 2: There are multiple ways to initiate the Edit collection process. One of them is by going to the target collection using Admin options. Rollover your cursor on the "Edit" sign.

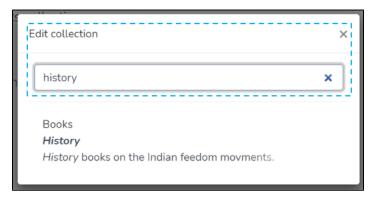


Step 3: Click on "Edit" and click on "Collection" to proceed with the edit collection process.





Step 4: A pop-up window showing list of collections will appear. Type the collection's name in the search field you want to edit. Upon typing a few letters of the collection's name, a list of collections with those letters or words will appear. Click on collection for initiating editing.



Step 5: The application will take the user to the edit collection form. The user can perform a range of actions to edit the collection. Each tab is explained in a separate process in this document.



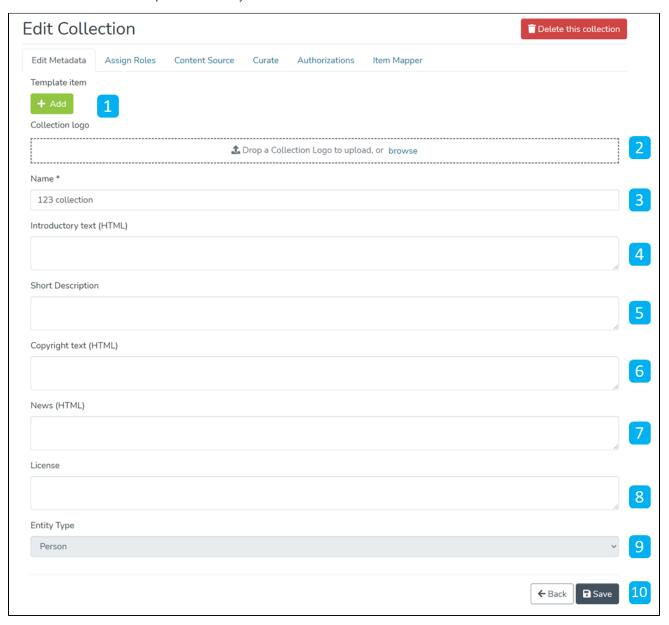
Delete this collection – The button provided for deleting the collection. Detailed steps are explained in the latter part of this
document.

- 2. Tabs Edit collection has a variety of activities involved, which are grouped in a logical manner across various tabs. Below is the summary of these tabs
 - a. Edit Metadata Tab covers activities related to editing Collection's profile information
 - b. Assign Roles This tab allows users to create specific roles for the collection
 - c. Content Source This tab enables harvesting the contents from various sources using OAI standards
 - d. Curate Users can set up various workflows related to content curation in this tab
 - e. Authorizations Under this tab, users can manage various groups created for managing different access rights and workflows specific to the collection

Edit Metadata

Step 6: Edit Metadata tab allows users to update the collection's profile-related information, a.k.a. collection Metadata.

Various actions on this tab are explained immediately after the Edit Metadata illustration is added below.



- 1. <u>Template Item</u> Users can add metadata elements and values during item submission in this collection. Item submitters can update or delete these pre-populated values during the submission process.
- 2. Collection logo Click on the delete button to remove the existing logo or add it if no logo exists.
- 3. Name Update the existing collection name in this field.
- 4. Introduction text (HTML) Update introductory text if already added or can add new text. One can utilize HTML tags to format the text or continue entering the plain text content.
- 5. Short Description Update the collection description or add a fresh short description for the collection.
- 6. Copyright text (HTML) Update copyrights related information in this field. Fields marked with (HTML) support HTML tags-based formatting.

- 7. New (HTML) Add/Update news specific to this collection in the field.
- 8. <u>License</u> Add/Update license-related information here.
- 9. Entity Type Once added an entity to the collection, the value remains constant and uneditable.
- 10. Action Button Clicking on the Save button will update the metadata information for the collection.

Template Item

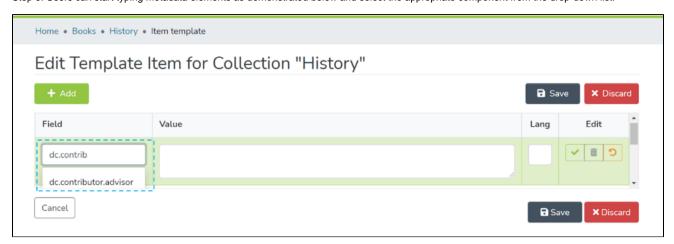
Step 7: Click the 'Edit' button under the Template Item section to add metadata elements with pre-populated values for the item submission process.



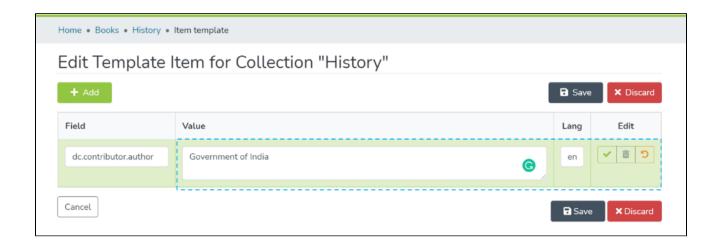
Step 8: Click on the Add button to add the metadata element.



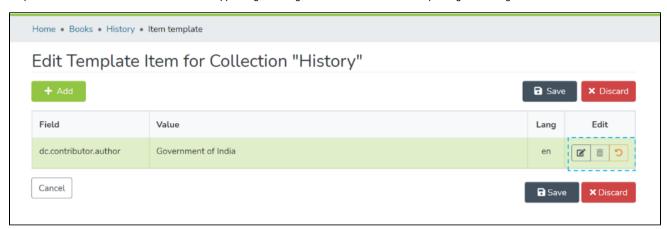
Step 9: Users can start typing metadata elements as demonstrated below and select the appropriate component from the drop-down list.



Step 10: Enter the desired value in the Value field, and enter the ISO code of the language used. Then, click on add button for adding the template metadata element.



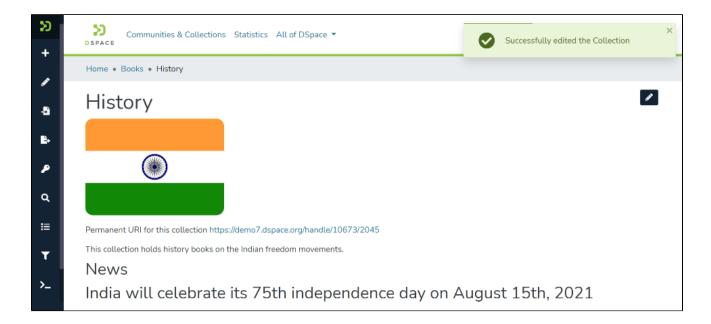
Step 11: Users can click on the action buttons appearing to the right of the element added for updating or deleting the value-added in the element.



Step 12: Click on the Save button to finish the template edit process. A pop-up notification confirming successful updates of the metadata element will appear, as demonstrated below.

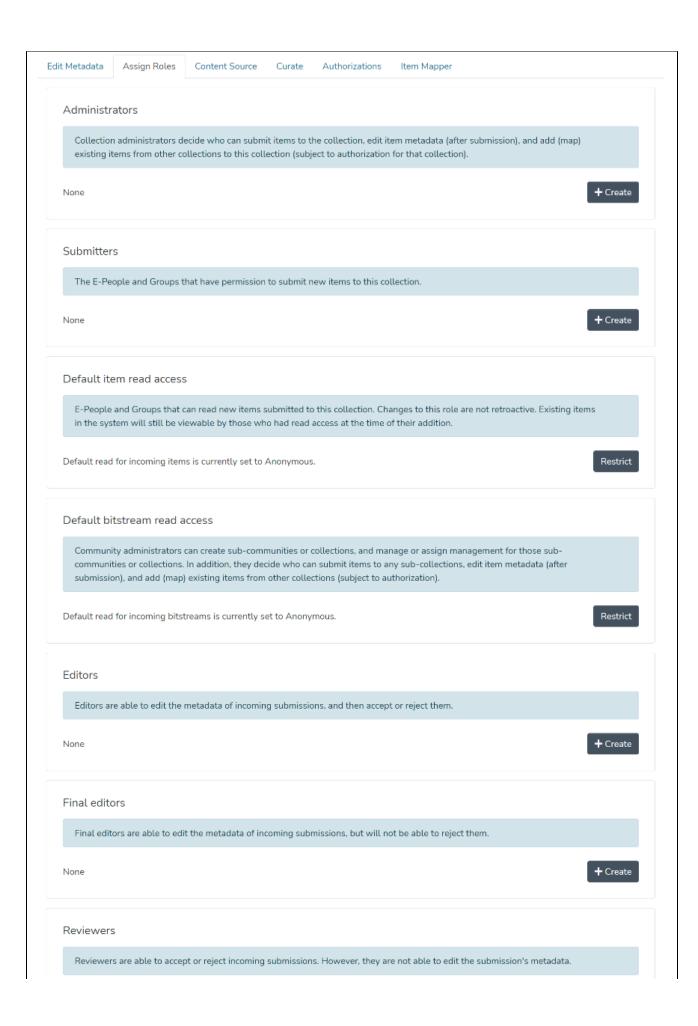


Step 13: Click on the Save button appearing at the bottom of the Edit Metadata tab to save all updates. A success prompt will appear, and the collection homepage will open.



Assign Roles

Step 14: This tab helps assign users to roles designed for the collection. These roles include administrative, maker-checker, and content consumption activities. The description for each role is provided below the screenshot.

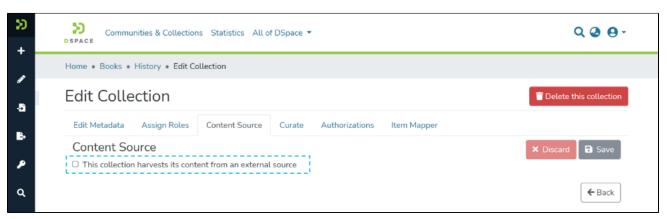




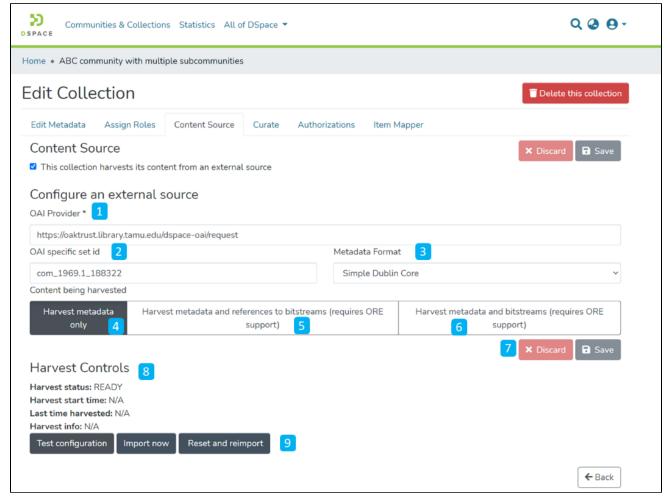
- 1. <u>Administrators</u> The collection administrator can assign rights like item submission, edit item metadata, and map existing items from other collections to this collection. Click the create button to create a dedicated Administrator group for the collection.
- 2. <u>Submitters</u> Users or User groups part of this group can submit items to the collection. Click on the create button to add specific users and user groups to perform item submission.
- 3. <u>Default item read access</u> E-People and Groups can read new items submitted to this collection. Changes to this role are not retroactive. Existing items in the system will still be viewable by those who had read access at the time of their addition. Click the restrict button to restrict default item read access rights to a specific user group.
- 4. <u>Default bitstream read access</u> E-People and Groups added in this section can read bitstreams (attachments) in items by default. Click the restrict button to restrict default bitstream read access rights to a specific user group.
- 5. Editors Editors can edit the metadata of submissions and then accept or reject them. Click on the create button to add the workflow step of editing metadata and assigning roles to specific users or user groups.
- 6. <u>Final editors</u> Final editors can edit the metadata of incoming submissions but can not reject them. Click the create button to add this workflow step to the collection and assign a role to specific users or user groups.
- 7. Reviewers Reviewers can accept or reject incoming submissions. However, they can not edit the metadata. Click the create button to add this workflow step to the collection and assign a role to specific users or user groups.

Content Source

Step 16: This tab enables harvesting the content from external sources using OAI standards. Users can start harvesting by clicking the checkbox, "This collection harvests its content from an external source."



Step 17: Users will see various parameters related to OAI-based content harvesting upon clicking the checkbox as explained in the previous step. Below is the explanation of elements appearing under Configure an external source header.



- 1. OAI Provider Enter the source OAI provider's URL.
- 2. OAI specific set id Enter the set ID to source content.
- 3. Metadata Format Select suitable metadata format using the dropdown list, e.g., Simple Dublin Core, Qualified Dublin Core, and DSpace Intermediate metadata.
- 4. Harvest metadata only Select this option to harvest only metadata from the source.
- 5. <u>Harvest metadata and references to bitstreams (requires ORE support)</u> Click on this option to harvest metadata and reference links to corresponding bitstreams.
- 6. <u>Harvest metadata and bitstream (requires ORE support)</u> Use this option to harvest both metadata and corresponding bitstreams into the target repository.
- 7. Click on the 'Save' button to update harvesting settings.

screenshot below.

8. Upon clicking the save button and subject to successful validation of values entered, "Harvest Status" will turn to "Ready," as demonstrated in the



9. After successfully configuring an OAI profile, these buttons will get active, and the user can start harvesting data immediately.

10. Users can click the "Test configuration" button to test settings and see a response message, as demonstrated on the screen below.



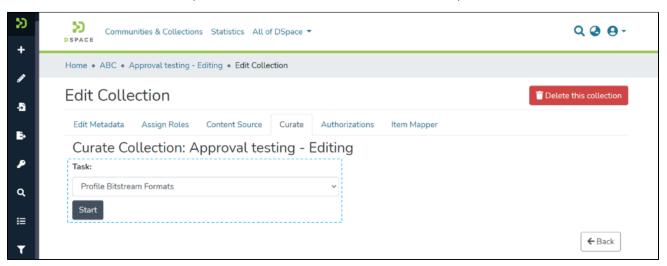
11. Upon successfully testing settings, click on the "Import now" button to harvest metadata immediately.

Curate

Step 18: The Curate tab provides various workflows for curating items stored in the collection. Below are standard flows, and there can be customized curation workflows as well

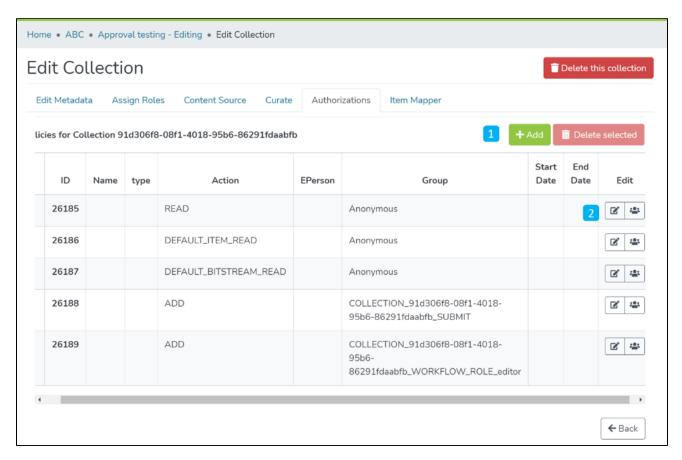
- 1. Profile bitstream formats
- 2. Check for Required Metadata
- 3. Check Links in Metadata

Users must select a workflow from the dropdown list and click the "Start" button to initiate the curation process.



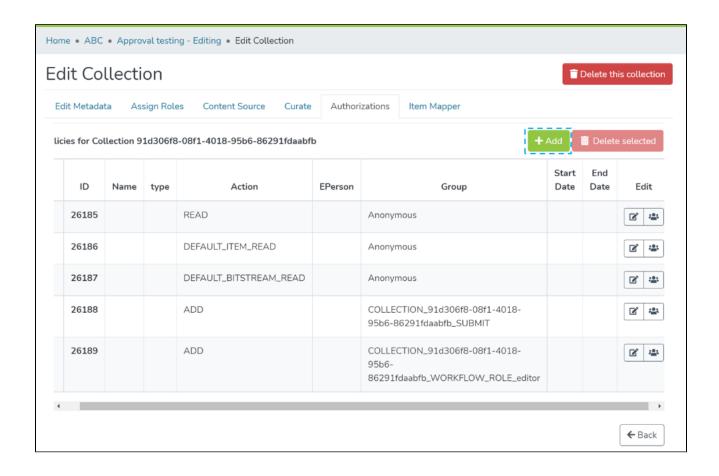
Authorizations

Step 19: Authorizations tab has all the policies defined for the collection. These are in addition to policies created from the "Assign Roles" tab. Key actions available in this tab are explained below.

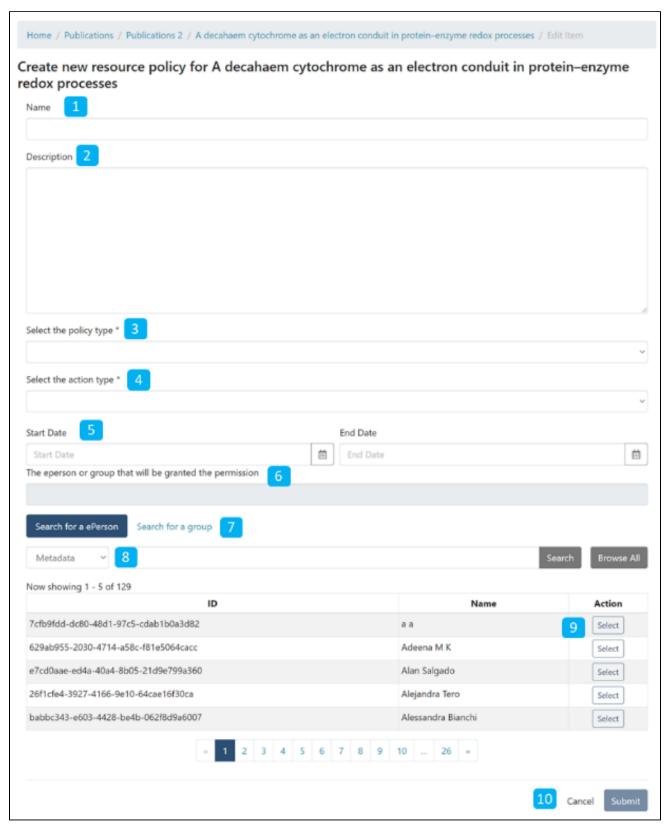


- 1. <u>Manage Policies</u> Click the Add button or select policies from the table to create a new policy. Next, click on the Delete selected button for a batch deletion of the policies.
- 2. Edit policy and members in a policy Click the edit button to edit an individual policy or click on the group icon to edit the user group.

Step 20: Click on Add button to create a new Authorization policy.



Step 21: Users can add information in the fields available in this form to the policy and save it by clicking the submit button. Please see the description of each field followed by the below screenshot.



- 1. Name: Enter the Policy name in this field.
- 2. Description: Enter the Policy description here for future reference and understanding of other users.
- 3. Select the policy type: The user can select one of the following policy classification types from the list
 - a. TYPE_SUBMISSION: a policy in place during the submission
 - b. TYPE_WORKFLOW: a policy in place during the approval workflow
 - c. TYPE INHERITED: a policy that has been inherited from a container (the collection)
 - d. TYPE CUSTOM: a policy defined by the user during the submission or workflow phase
- 4. Select the action type: The user can select one of the following actions from the dropdown list:

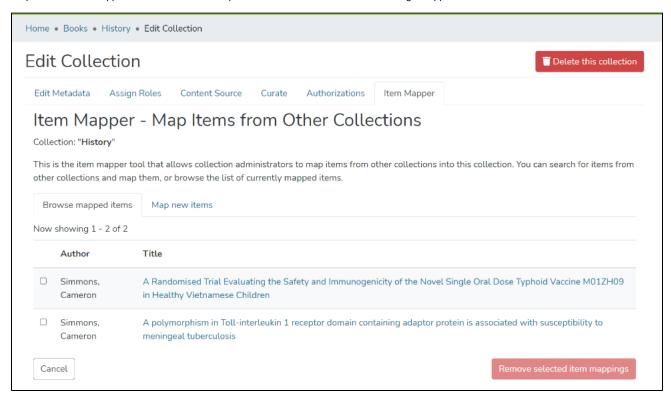
- a. READ
- b. WRITE
- c. REMOVE
- d. ADMIN
- e. DELETE
- f. WITHDRAWN_READ
- g. DEFAULT_BITSTREAM_READ
- h. DEFAULT_ITEM_READ
- 5. Start date end date: The user can select the start date and end date for using the policy, should they want to apply it for a fixed period.
- 6. The eperson or group that will be granted the permission: List of users/groups selected for granting permission under the policy
- 7. Search for an ePerson / Search for a group: Select ePerson or group for searching the entity
- 8. Search field: Enter keywords for searching the ePerson/Group
- 9. ePerson/Group list: Click on the select button against the user/group you want to add to the policy
- 10. Submit/Cancel button: Click on the Submit button to complete policy creation or click on the Cancel button to cancel the entire process.

You'll see a confirmation prompt upon successfully creating the policy, as shown below. After that, the user will be back on the Authorizations screen.

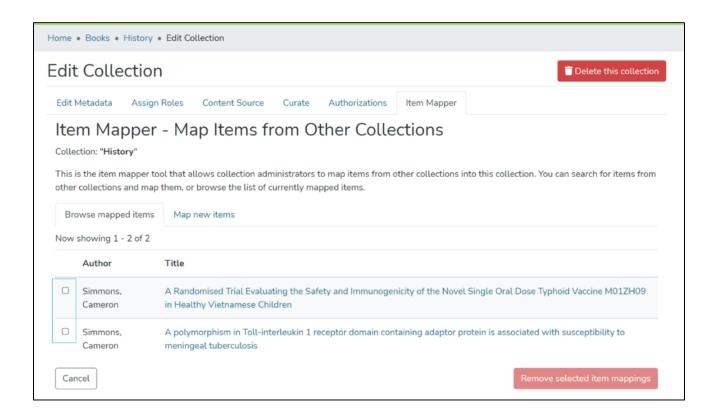
Item Mapper

Manage mapped items

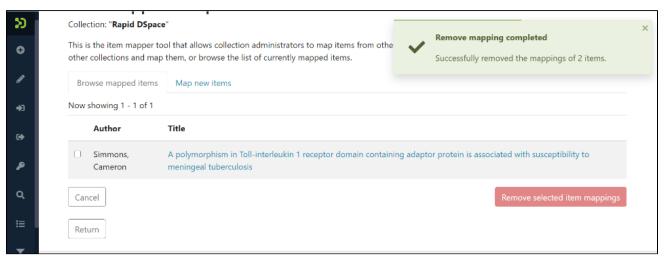
Step 22: The item mapper tab allows users to map items from other collections and manage mapped items.



Step 23: You'll see items mapped with collections under the "Browse mapped items" tab. Click on the checkbox appearing with each item to select the item (s) required to be unmapped.

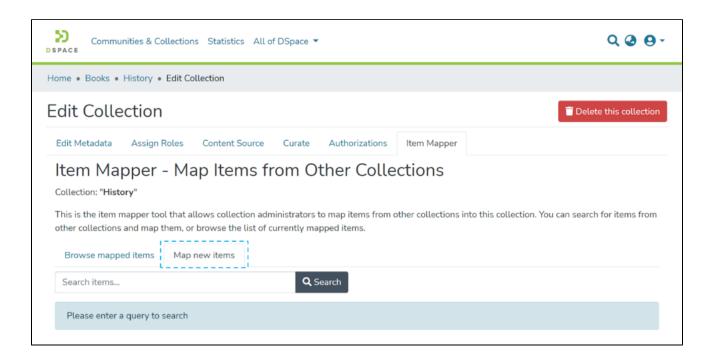


Step 24: After selecting items required to be unmapped, please click on "Remove selected item mappings" to complete the operation. Click on the "Cancel" button on the left of "Remove selected item mappings" to cancel the process.



Map new items

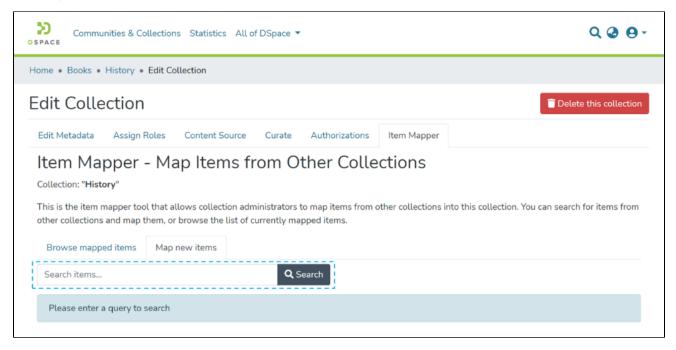
Step 25: Click on the "Map new items" to search items for mapping.



Step 26: After confirming the non-existence of the target item in the existing mapped items list, please click on "Map new items." Then, enter keywords /keyphrases in the search field to search for target items.

Click on the "Search" button as highlighted on the below screen.

You must know that you can enter keywords or keyphrases from any metadata field. Search field under "Map new items" work exactly like the basic search field of DSpace.

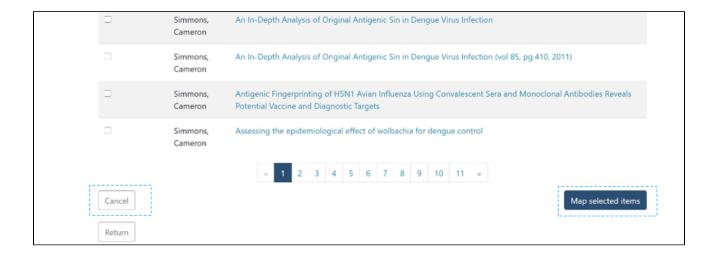


Step 27: Users can select target items from the search results by clicking the checkbox appearing with items.

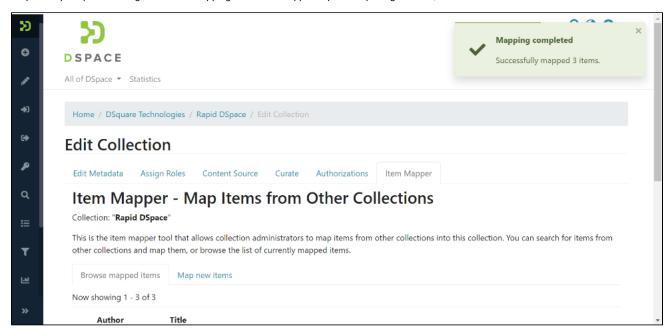
Home / DSquare Technologies / Rapid DSpace / Edit Collection		
Edit Collection		
Edit Metadata	Assign Roles	Content Source Curate Authorizations Item Mapper
Item Mapper - Map Items from Other Collections Collection: "Rapid DSpace"		
This is the item mapper tool that allows collection administrators to map items from other collections into this collection. You can search for items from other collections and map them, or browse the list of currently mapped items.		
Browse mapped items Map new items		
infection		Search
Now showing 1 - 10 of 110		
Collection	Author	Title
0	Simmons, Cameron	A birth cohort study of viral infections in Vietnamese infants and children: study design, methods and characteristics of the cohort
•	Simmons, Cameron	A cohort study to define the age-specific incidence and risk factors of Shigella diarrhoeal infections in Vietnamese children: a study protocol
0	Simmons, Cameron	A new class of highly potent, broadly neutralizing antibodies isolated from viremic patients infected with dengue virus
0	Simmons, Cameron	A polymorphism in Toll-interleukin 1 receptor domain containing adaptor protein is associated with susceptibility to meningeal tuberculosis
	Simmons, Cameron	A Randomized Controlled Trial of Chloroquine for the Treatment of Dengue in Vietnamese Adults
0	Simmons, Cameron	A Randomized, Double-Blind Placebo Controlled Trial of Balapiravir, a Polymerase Inhibitor, in Adult Dengue Patients
	Simmons, Cameron	An In-Depth Analysis of Original Antigenic Sin in Dengue Virus Infection
	Simmons, Cameron	An In-Depth Analysis of Original Antigenic Sin in Dengue Virus Infection (vol 85, pg 410, 2011)
	Simmons, Cameron	Antigenic Fingerprinting of H5N1 Avian Influenza Using Convalescent Sera and Monoclonal Antibodies Reveals Potential Vaccine and Diagnostic Targets
О	Simmons, Cameron	Assessing the epidemiological effect of wolbachia for dengue control
		« 1 2 3 4 5 6 7 8 9 10 11 »
Cancel		Map selected items
Return		

Step 28: After selecting target items, please click on the "Map selected items" button at the bottom of the page to complete the item mapping process.

Click the "Cancel" button to cancel the activity and return to the collection edit page.



Step 29: A prompt confirming successful mapping of items will appear upon completing the task, as demonstrated below.



Mapped items will appear in the collection and under the "Browse mapped items" tab, as demonstrated below.

