



# Configuration Guide

Version 6.3

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## Updates to This Guide

This guide is being reissued for the 6.3 release. No changes were made for this release.



# 1

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## Understanding System Configuration

This section contains:

- **About System Configuration** on page 13
- **Initial Configuration** on page 14
- **Configuration Pages** on page 15
- **Code Tables** on page 15
- **Mapping Tables** on page 15
- **Configuration Files** on page 15

### About System Configuration

Library Administrators configure components of the Rosetta system infrastructure such as user accounts, material flows, and content processing. These components are accessed through the Administrative interface of Rosetta, also referred to as Advanced Configuration.

The Administrative interface works on the consortium level for any customer. The Management interface works on the institutional level. For information on the Management interface and institutional level, see the *Rosetta Staff User's Guide*. For further information about consortium structure in Rosetta, see **Administrative Structure** on page 21.

Ex Libris performs an initial configuration during implementation with input from the library Administrator. Afterwards, Administrators can modify advanced configuration settings and perform maintenance tasks on their own.

The following sections describe these configuration stages and methods.

## Initial Configuration

Initial configuration tasks are performed by the System Administrator together with an Ex Libris support team member. Your library may be asked for information prior to or during this process, but Ex Libris conducts the tasks.

The Initial Configuration page has no link or user access from the Rosetta interface. The page is located at the following URL:

<http://<server-name>:1801/mng/action/menus.do?menuKey=com.exlibris.dps.adm.general.menu.initial>.

The Initial Configuration home page looks like the following:

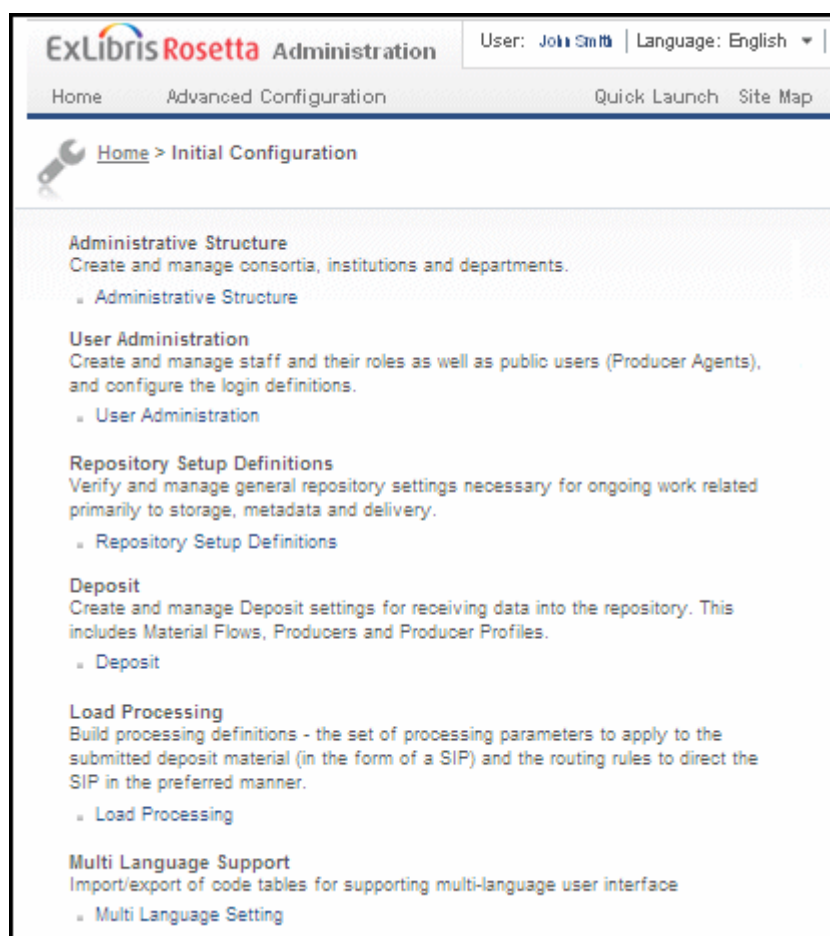


Figure 1: Initial Configuration Home Page

## Configuration Pages

Configuration pages provide user interface elements (such as fields and drop-down lists) that Administrators and staff users can use when configuring the system. Administrators can use configuration pages for defining a wide variety of parameters, including SIPs, storage rules, delivery rules, and users.

## Code Tables

Code tables are stored in the Rosetta system database. They enable an Administrator to define options that must be available to staff users on configuration pages when they configure the system.

Because code tables facilitate the translation of options to multiple languages, Administrators can use code tables to define those options that must be translated, including Producer groups, Producer classification, and material types.

Administrators can perform various actions, such as adding, activating, and deleting options in any code table. For more information on working with code tables, see [Working with Code Tables](#) on page 234.

## Mapping Tables

Mapping tables enable Administrators to control the connections between entities in the Rosetta system. For example, Administrators can specify which program the Rosetta system uses to validate PDF files by mapping a connection between the file format (PDF) and the program that validates PDF files.

Administrators use mapping tables to configure such components as delivery copyright statements and large file handling parameters. For more information on working with mapping tables, see [Working with Mapping Tables](#) on page 238.

## Configuration Files

Configuration files enable Administrators to define advanced settings at the consortial level, such as metadata and e-mail configuration. The configuration files can be stored in various formats, such as XML or XSL.

The Rosetta system includes a text editor that Administrators can use to edit configuration files. For more information, see [Working with Configuration Files](#) on page 231.



# 2

## Administration

An Administrator performs configurations in order to define general components that are not frequently changed. Administrators use the Administration page for this purpose.

To access the Administration page, log on to Rosetta. If your logon profile does not immediately take you to the Administration module, then, from the Management Home page, under **What else can I do**, click **Administer the System**. The Administration page opens.

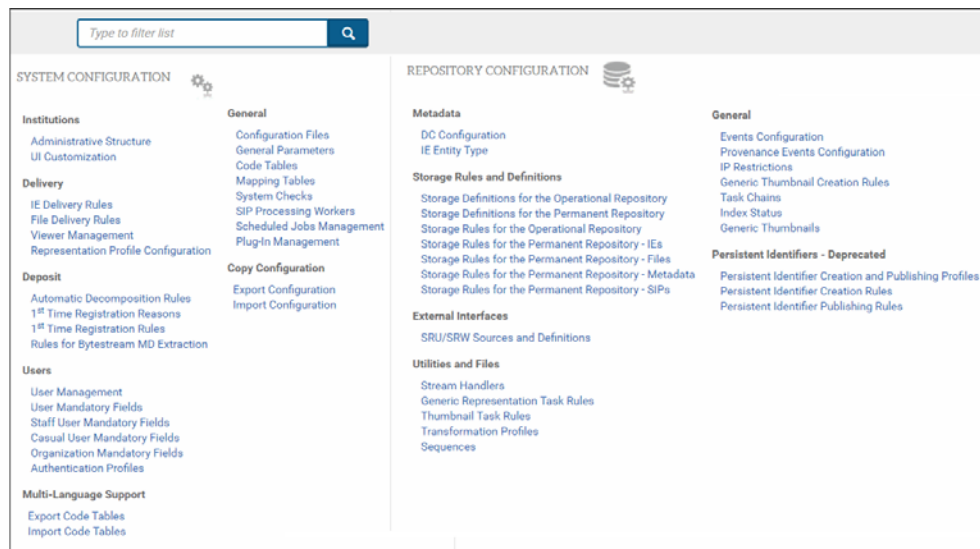


Figure 2: Advanced Configuration Page

The page contains configuration components that are organized into groups, as described in the following table:

Table 1. Administration Components

Group	Contains Components that Define...
Institutions	<ul style="list-style-type: none"> <li>■ Administrative Structure For more information, see <a href="#">Administrative Structure</a> on page 21.</li> <li>■ UI Customization For more information, see <a href="#">UI Customization</a> on page 224.</li> </ul>
Delivery	<ul style="list-style-type: none"> <li>■ IE Delivery Rules For more information, see <a href="#">IE Delivery Rules</a> on page 39.</li> <li>■ File Delivery Rules For more information, see <a href="#">File Delivery Rules</a> on page 42.</li> <li>■ Viewers Management For more information, see <a href="#">Managing Viewers</a> on page 53.</li> <li>■ Representation Profiles Configuration For more information, see <a href="#">Representation Profiles</a> on page 47.</li> </ul>
Deposit	<ul style="list-style-type: none"> <li>■ Automatic Decomposition Rules For more information, see <a href="#">Automatic Decomposition Rules</a> on page 73.</li> <li>■ 1st Time Registration Reasons For more information, see <a href="#">Registration Process and Rules</a> on page 147.</li> <li>■ 1st Time Registration Rules For more information, see <a href="#">Registration Process and Rules</a> on page 147.</li> <li>■ Rules for Bytestream MD Extraction</li> </ul>
Users	<ul style="list-style-type: none"> <li>■ User Management For more information, see <a href="#">User Management</a> on page 143.</li> <li>■ User Mandatory Fields</li> <li>■ Staff User Mandatory Fields</li> <li>■ Casual User Mandatory Fields</li> <li>■ Organization Mandatory Fields</li> </ul> <p>For more information, see <a href="#">Defining User Mandatory Fields</a> on page 166.</p> <ul style="list-style-type: none"> <li>■ Authentication Profiles See <a href="#">User Authentication with SAML</a> on page 167.</li> </ul>
Multi-Language Support	<ul style="list-style-type: none"> <li>■ Export Code Tables</li> <li>■ Import Code Tables</li> </ul> <p>For more information, see <a href="#">Multi-Language Support</a> on page 221.</p>

Table 1. Administration Components

Group	Contains Components that Define...
General	<ul style="list-style-type: none"> <li>■ Configuration Files For more information, see <a href="#">Working with Configuration Files</a> on page 231.</li> <li>■ General Parameters For more information, see <a href="#">Working with General Parameters</a> on page 233.</li> <li>■ Code Tables For more information, see <a href="#">Working with Code Tables</a> on page 234.</li> <li>■ Mapping Tables For more information, see <a href="#">Working with Mapping Tables</a> on page 238.</li> <li>■ System Checks For more information, see <a href="#">System Checks</a> on page 241.</li> <li>■ SIP Processing Workers</li> <li>■ Scheduled Jobs Management For more information, see the <i>Rosetta System Administration Guide</i>.</li> <li>■ Plug-In Management For more information, see <a href="#">Plug-in Management</a> on page 171.</li> </ul>
Copy Configuration	<ul style="list-style-type: none"> <li>■ Export Configuration</li> <li>■ Import Configuration</li> </ul> <p>For more information, see the <i>Rosetta System Administration Guide</i>.</p>
Metadata	<ul style="list-style-type: none"> <li>■ DC Configuration For more information, see <a href="#">Configuring the DC Editor</a> on page 92</li> <li>■ IE Entity Type For more information, see <a href="#">Configuring Intellectual Entity (IE) Types</a> on page 93</li> </ul>
Storage Rules and Definitions	<ul style="list-style-type: none"> <li>■ Storage Definitions for the Operational Repository</li> <li>■ Storage Definitions for the Permanent Repository</li> <li>■ Storage Rules for the Operational Repository</li> <li>■ Storage Rules for the Permanent Repository - IEs</li> <li>■ Storage Rules for the Permanent Repository - Files</li> <li>■ Storage Rules for the Permanent Repository - Metadata</li> <li>■ Storage Rules for the Permanent Repository - SIPs</li> </ul>
External Interfaces	<ul style="list-style-type: none"> <li>■ SRU/SRW Sources and Definitions. For more information, see the <i>System Administration Guide: Configuring External Metadata: SRU/SRW</i> on page 55.</li> </ul>

Table 1. Administration Components

Group	Contains Components that Define...
Utilities and Files	<ul style="list-style-type: none"> <li>■ Stream Handlers</li> <li>■ Generic Representation Task Rules</li> <li>■ Thumbnail Task Rules</li> </ul> <p>For more information, see <a href="#">About Tasks</a> on page 80.</p> <ul style="list-style-type: none"> <li>■ Transformation Profiles For more information, see <a href="#">Transformation Profiles</a> on page 101.</li> <li>■ Sequences For more information, see <a href="#">Configuring Sequences</a> on page 115.</li> </ul>
General	<ul style="list-style-type: none"> <li>■ Events Configuration For more information, see <a href="#">Configuring Events</a> on page 109.</li> <li>■ Provenance Events Configuration For more information, see <a href="#">Configuring Provenance</a> on page 110.</li> <li>■ IP Restrictions For more information, see <a href="#">Configuring IP Restrictions</a> on page 110.</li> <li>■ Generic Thumbnail Creation Rules For more information, see <a href="#">Generic Thumbnail Creation</a> on page 111.</li> <li>■ Task Chains For more information, see <a href="#">Tasks, Task Chains, and Processes</a> on page 79</li> <li>■ Index Status</li> <li>■ Generic Thumbnails For more information, see <a href="#">Selecting the Default Thumbnail Image</a> on page 114</li> </ul>
Persistent Identifiers – Deprecated	<ul style="list-style-type: none"> <li>■ Persistent Identifier Creation and Publishing Profiles For more information, see <a href="#">Configuring Creation and Publishing Profiles</a> on page 124.</li> <li>■ Persistent Identifier Creation Rules For more information, see <a href="#">Configuring Creation Rules</a> on page 128.</li> <li>■ Persistent Identifier Publishing Rules For more information, see <a href="#">Configuring Publishing Rules</a> on page 132.</li> </ul>

# 3

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## Administrative Structure

This section contains:

- **Configuring a Consortium** on page 21
- **Configuring Institutions Within a Consortium** on page 22
- **Configuring Departments Within an Institution** on page 29
- **Remote Institution Monitoring** on page 32

### Configuring a Consortium

If your organization is using the consortial capabilities of Rosetta, your Administrator will set up the individual institutions and make any edits to the consortium properties. This work begins on the List of Institutions page. To access the page, from the Administration Home page, click **Advanced Configuration**, then the **Administrative Structure** heading. This opens the List of Institutions page.

Home > Advanced Configuration > List of Institutions

**Consortium information**

\* Code: CRS00      \* Name: Preservation Consortium  
\* Description: Preservation Consortium  
Updated by: admin1      Updated on: 20/07/2011

**Institution List**

Create new Institution

Code	Name	Description	Updated on	Updated by	Edit	Delete	PDS
1 INS00	Demo Institution	Demo Institution	-	-	Edit	Delete	PDS
2 INS01	Test Inst	for testing	21/07/2011	admin1	Edit	Delete	PDS

Back      Save

Figure 3: List of Institutions for Consortium

The name and description fields of the consortium are editable and any institutions that have been added to the consortium are listed on the lower part of the page.

## Updating a Consortium

Administrators can change the properties of their existing consortium, such as changing the consortium's name and description.

To update a consortium:

- 1 From the Advanced Configuration home page, click **Advanced Configuration**, then the **Administrative Structure** heading. The List of Institutions page opens (see [Figure 3](#)).
- 2 In the **Consortium information** pane, modify the fields that you want to update.
- 3 Click **Save**.

The updated consortium is saved in the Rosetta system.

## Configuring Institutions Within a Consortium

Administrators work with a consortium's institutions using the Institutions List page. The following actions can be performed on this page:

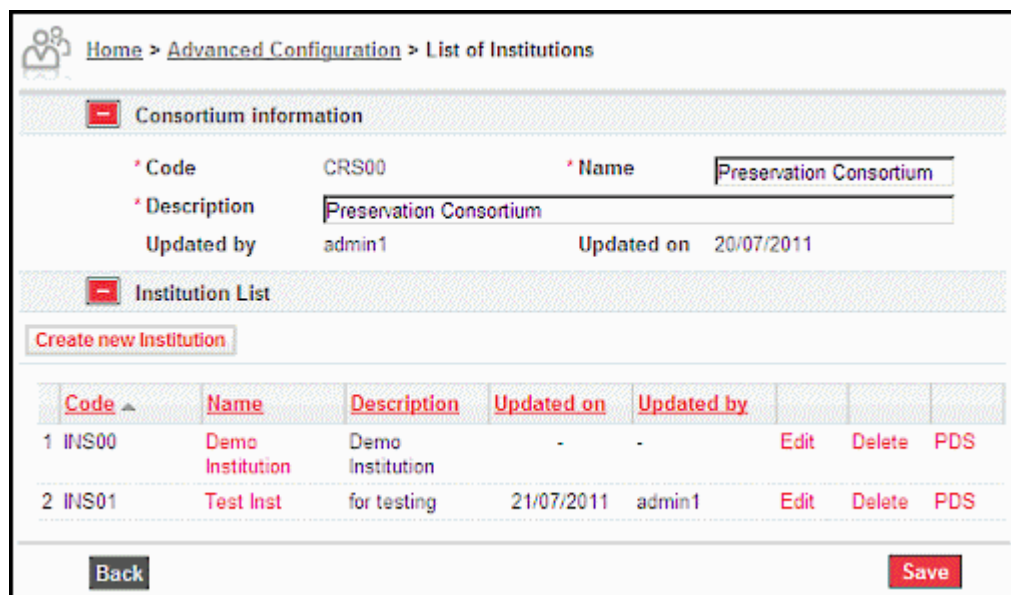
- [Viewing Institutions Within a Consortium](#) on page 23
- [Adding a New Institution](#) on page 23
- [Updating an Institution](#) on page 26
- [Configuring an Institution to Work With a Patron Directory Service](#) on page 26
- [Deleting an Institution](#) on page 28

## Viewing Institutions Within a Consortium

Administrators can view institutions within a consortium.

To view institutions within a consortium:

- 1 Access the List of Institutions page from the Administrative Home page: click **Advanced Configuration > Administrative Structure**.
- 2 The List of Institutions page opens.



Home > Advanced Configuration > List of Institutions

**Consortium information**

\* Code: CRS00      \* Name: Preservation Consortium  
\* Description: Preservation Consortium  
Updated by: admin1      Updated on: 20/07/2011

**Institution List**

Create new Institution

Code	Name	Description	Updated on	Updated by			
1 INS00	Demo Institution	Demo Institution	-	-	Edit	Delete	PDS
2 INS01	Test Inst	for testing	21/07/2011	admin1	Edit	Delete	PDS

Back      Save

Figure 4: Institution List Page

## Adding a New Institution

Administrators can add a new institution to a consortium. New institutions copy the settings of the first institution configured for this consortium. Settings can be edited after the new institution has been saved.

**To add an institution:**

- 1 Open the List of Institutions page by clicking **Advanced Configuration > Administrative Structure** from the Administration Home page.
- 2 Click the **Create new Institution** button.

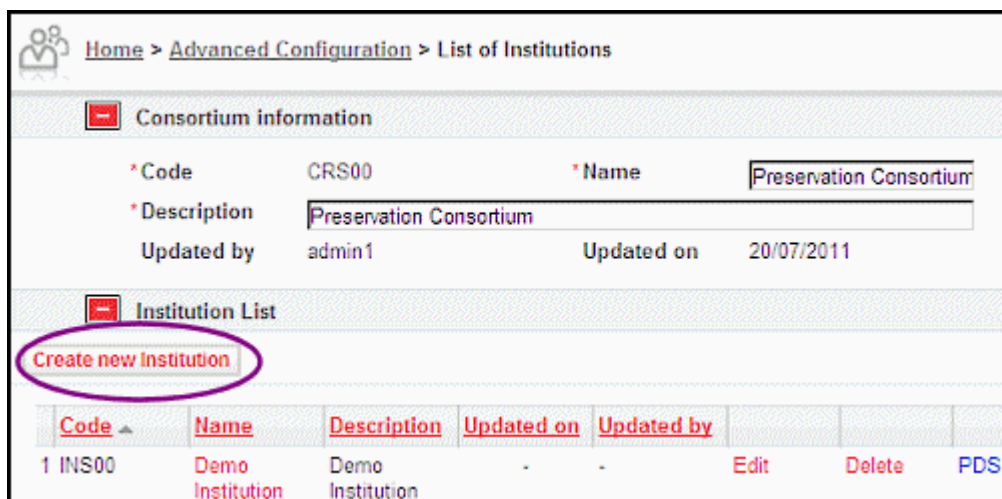


Figure 5: Create new Institution button

The institution information form opens.

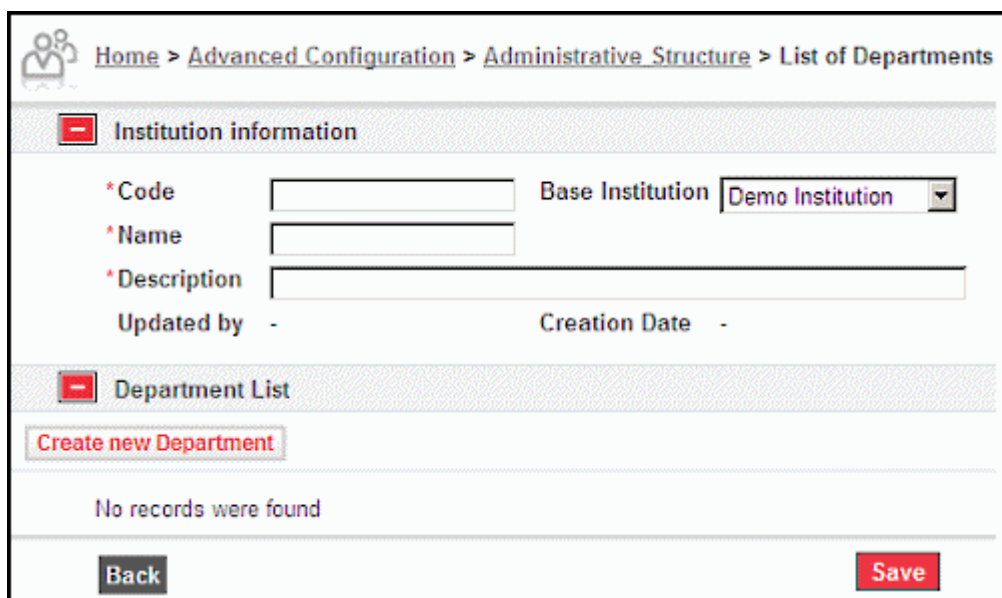


Figure 6: Institution Information Form/List of Departments

- 3 Enter information in the **Code**, **Name**, and **Description** fields.

---

**NOTE:**

The code is any alphanumeric combination (but cannot start with a number) that has meaning within the context of your institution. It will also be used for identification purposes within the Rosetta system.

---

- 4 Select a **Base institution** from the drop-down list of existing institutions.
- 

**NOTE:**

The base institution determines default settings for institution-level items like metadata profiles, SIP processing rules, and SIP routing rules.

---

- 5 Click **Create New Department**.
- 

**NOTE:**

Every institution must create at least one department before it can be saved to the database and included as a member of the consortium.

---

A new department form opens in a light box over the page.



Figure 7: New Department Form

- 6 Enter a **Code**, **Name**, and **Description** for the department and click **Add**.  
The department information displays on the Department List section of the List of Departments page.
- 7 Add as many departments as you need for your institution.
- 8 Click **Save**.

The new institution is displayed in the Institution List pane and is saved in the Rosetta system.

At the top of the list, Rosetta indicates your username and password for the new institution. This username and password is necessary to prevent your current user information from being shared with other institutions. To add users to your new institution, log out and log in again with the new username and password.

## Updating an Institution

Administrators can change the properties of an existing institution, such as changing the institution's name and description, by updating it.

### To update an institution:

- 1 On the Institution List page (see [Viewing Institutions Within a Consortium](#) on page 23), in the **Institution List** pane, locate the institution with which you want to work and click **Edit**.

The Department List page opens.

Home > Advanced Configuration > Administrative Structure > List of Departments

**Institution information**

Code: INS00      Name: Demo Institution  
Description: Demo Institution  
Updated by: admin1      Creation Date: 25/07/2011

**Department List**

Create new Department

Code	Name	Description	Updated on	Updated by	Edit	Delete
1 DPR01	Demo 01	Demo 01 Department	25/07/2011	admin1	Edit	Delete

Back      Save

Figure 8: Department List Page

- 2 In the **Institution Information** pane, modify the fields that you want to update.
- 3 Click **Save**.

The updated institution is saved in the Rosetta system.

## Configuring an Institution to Work With a Patron Directory Service

In order for users to sign in to the new institution, the institution must be configured in the PDS as well as in Rosetta.

To create a PDS-enabled institution:

- 1 On the Institution List page (see [Viewing Institutions Within a Consortium](#) on page 23), in the **Institution List** pane, locate the institution you want to configure for PDS and click the corresponding **PDS** text link.

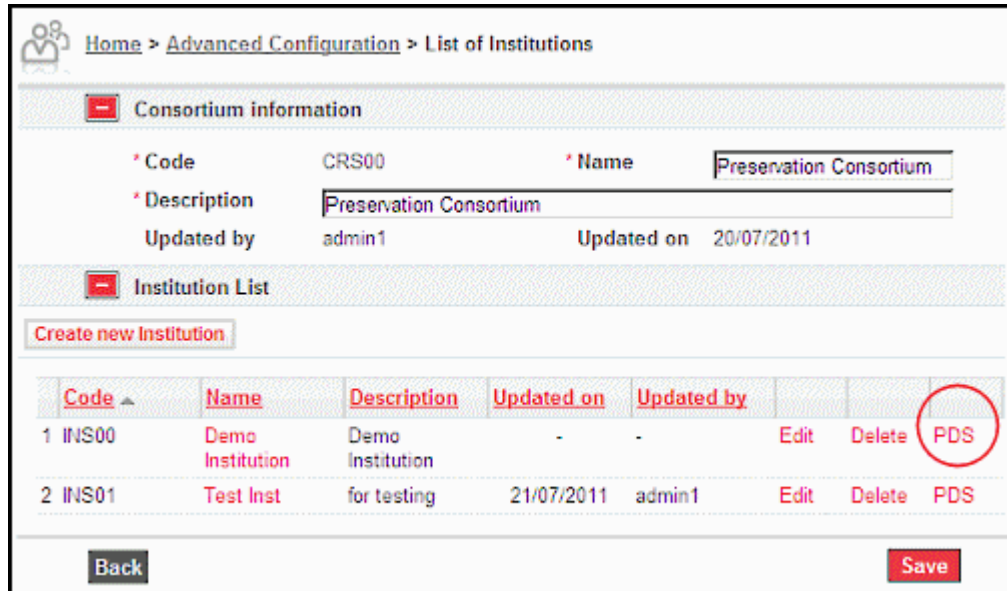
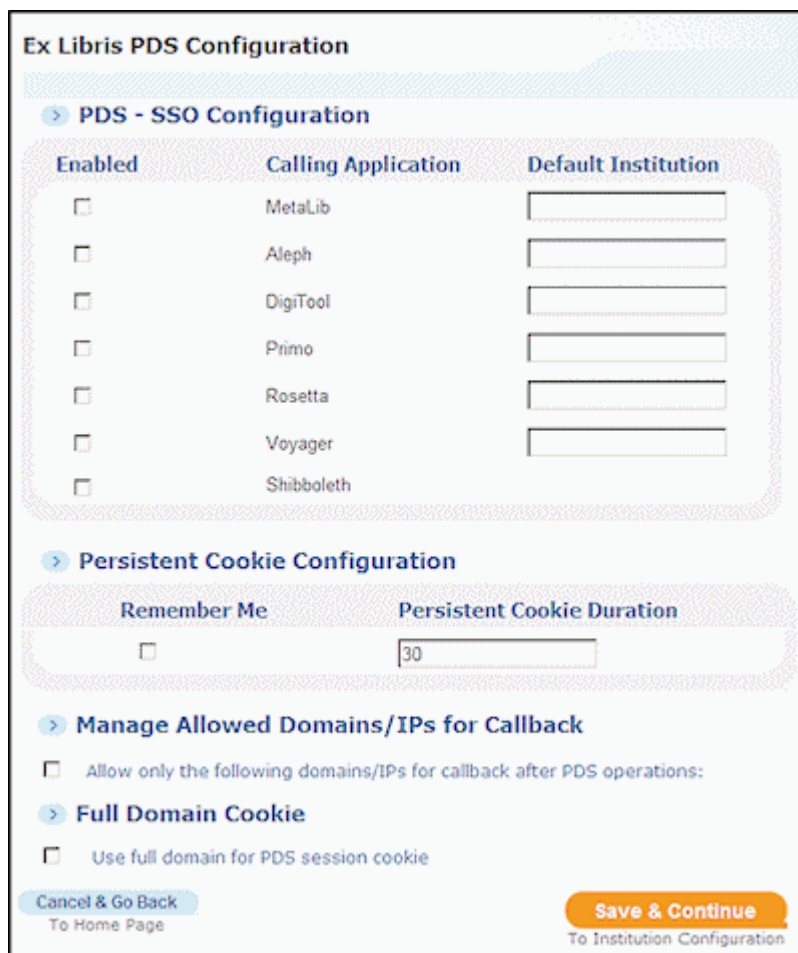


Figure 9: PDS Link from the List of Institutions Page

The Ex Libris PDS Configuration page opens.



The image shows a web-based configuration form titled "Ex Libris PDS Configuration". It is divided into several sections:

- PDS - SSO Configuration:** A table with three columns: "Enabled", "Calling Application", and "Default Institution". There are seven rows, each with a checkbox, an application name, and an input field.

Enabled	Calling Application	Default Institution
<input type="checkbox"/>	MetaLib	<input type="text"/>
<input type="checkbox"/>	Aleph	<input type="text"/>
<input type="checkbox"/>	DigiTool	<input type="text"/>
<input type="checkbox"/>	Primo	<input type="text"/>
<input type="checkbox"/>	Rosetta	<input type="text"/>
<input type="checkbox"/>	Voyager	<input type="text"/>
<input type="checkbox"/>	Shibboleth	<input type="text"/>
- Persistent Cookie Configuration:** Two options: "Remember Me" (checkbox) and "Persistent Cookie Duration" (input field with "30").
- Manage Allowed Domains/IPs for Callback:** A checkbox labeled "Allow only the following domains/IPs for callback after PDS operations:".
- Full Domain Cookie:** A checkbox labeled "Use full domain for PDS session cookie".

At the bottom, there are two buttons: "Cancel & Go Back To Home Page" and "Save & Continue To Institution Configuration".

Figure 10: Ex Libris PDS Configuration Form

- 2 Fill out the PDS Configuration form and click **Save & Continue** to move through the remaining configuration pages.

For information about Patron Directory Services and how to configure them, see the *Patron Directory Services Guide* in the Cross-Product section of the Ex Libris Documentation Center.

## Deleting an Institution

Administrators can delete existing institutions as long as there are no IEs associated with the institution. An Administrator cannot delete an institution through which he or she is currently logged on.

---

### CAUTION:

Deleting an institution will cause the user to lose access to all objects that were deposited through this institution.

---

#### To delete an institution:

- 1 On the Consortium Information page (see [Viewing Institutions Within a Consortium](#) on page 23), in the **Institution List** pane, locate the institution that you want to delete and click **Delete**. The confirmation page opens.
- 2 Click **OK**.

The institution is deleted from the Rosetta system.

## Configuring Departments Within an Institution

Administrators can work with an institution's departments using the List of Departments page. The following actions can be performed on this page:

- [Viewing Departments Within an Institution](#) on page 29
- [Adding a New Department](#) on page 30
- [Updating a Department](#) on page 31
- [Deleting a Department](#) on page 32

### Viewing Departments Within an Institution

Administrators can view departments within an institution.

#### To view departments within an institution:

- 1 On the Consortium List page (see [Configuring a Consortium](#) on page 21), in the **Institution List** pane, locate the institution with which you want to work and click **Edit**. The Institution List page opens.
- 2 Locate the institution within which you want to view departments and click **Edit**. The Department List page opens.

The screenshot displays a web application interface for managing departments. At the top, a breadcrumb trail reads: Home > Advanced Configuration > Administrative Structure > List of Departments. Below this, there are two main sections: 'Institution information' and 'Department List'.

The 'Institution information' section contains the following fields:

- Code:** INS00
- Name:** Demo Institution
- Description:** Demo Institution
- Updated by:** admin1
- Creation Date:** 25/07/2011

The 'Department List' section features a 'Create new Department' button and a table with the following data:

Code	Name	Description	Updated on	Updated by		
1 DPR01	Demo 01	Demo 01 Department	25/07/2011	admin1	Edit	Delete

At the bottom of the page, there are 'Back' and 'Save' buttons.

Figure 11: Department List Page

## Adding a New Department

Administrators can add a new department to an institution.

---

### NOTE:

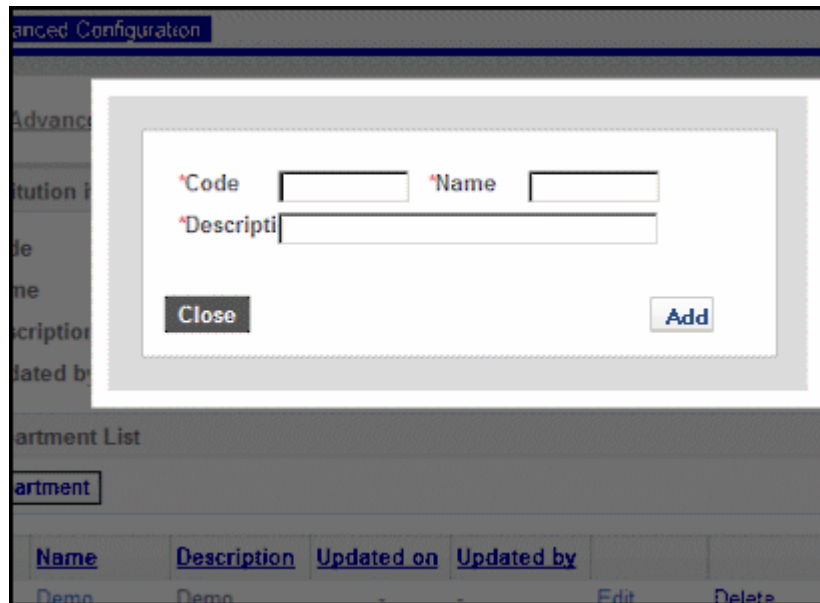
There is no limit to the number of departments that can be added to an institution.

---

### To add a department:

- 1 On the Department List page (see [Viewing Departments Within an Institution](#) on page 29), click the **Create New Department** button.

A blank department form opens in a light box over the page.



The screenshot shows a web application interface. At the top, there's a header 'Advanced Configuration'. Below it, a modal dialog box is open, titled 'New Department Form'. This dialog contains three input fields: '\*Code', '\*Name', and '\*Description', each with an asterisk indicating it's a required field. Below these fields are two buttons: 'Close' and 'Add'. In the background, a 'Department List' table is visible, with columns for 'Name', 'Description', 'Updated on', and 'Updated by'. The table contains one row with the value 'Demo' in the 'Name' and 'Description' columns. Below the table, there are 'Edit' and 'Delete' buttons for each row.

Figure 12: New Department Form

- 2 Enter information for all three required fields.
- 3 Click **Add**.

The new department is displayed in the Department List pane and is saved in the Rosetta system.

## Updating a Department

Administrators can change the properties of an existing department, such as changing the department's name and description, by updating it.

### To update a department:

- 1 On the Department List page (see [Viewing Departments Within an Institution](#) on page 29), in the **Department List** pane, locate the department you want to change and click **Edit**.

The department information displays in a light box over the page.

- 2 Modify the fields that you want to update.
- 3 Click **Save**.

The updated department is saved in the Rosetta system.

## Deleting a Department

Administrators can delete an existing department. However, Administrators cannot delete a department when the department's users (such as Producer Agents and staff users) are depositing, or have already deposited, content to the Rosetta system.

**To delete a department:**

- 1 On the Institution Information page (see [Viewing Departments Within an Institution](#) on page 29), in the **Department List** pane, locate the department that you want to delete and click **Delete**. The confirmation page opens.
- 2 Click **OK**.

The department is deleted from the Rosetta system.

## Remote Institution Monitoring

You can configure the consortium institution to view dashboard BIRT reports provided by another instance that is not part of your consortia.

### Member Institution Configuration

Perform the following configurations for each member institution for which you want to view BIRT reports:

- 1 Set the `enable_remote_reports_user` parameter (Admin UI > General > General Parameters) to `true`.
- 2 Take the key from the `remote_access_key` parameter to enter in the consortium institution.
- 3 Click **Update**.

### Consortium Institution Configuration

Perform the following configurations for the consortium institution:

- 1 Set the `remote_management` parameter (Admin UI > General > General Parameters) to `true`.
- 2 Open the **Remote Instances for Reports** mapping table (Admin UI > General > Mapping Tables). The following appears:

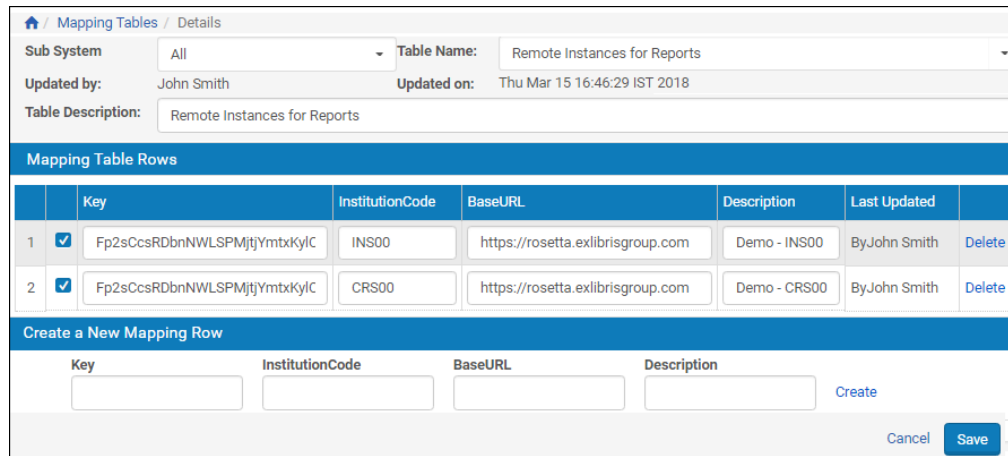


Figure 13: Remote Instances for Reports

- 3 For each member institution for which you want to view BIRT reports, enter the key, institution code, base URL, and description.
- 4 Click **Save**.

A drop-down list appears that allows you to display the BIRT reports provided by another instance that is not part of your consortia:

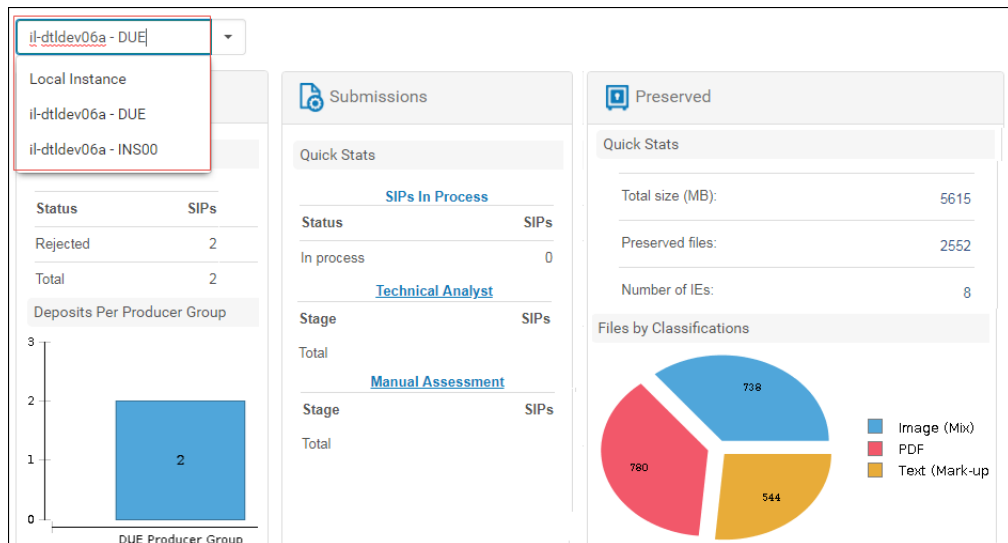


Figure 14: Remote Institution Monitoring



# 4

---

## Configuring Delivery

This section contains:

- **Understanding Delivery** on page 35
- **Delivery Components** on page 37
- **Delivery Rules** on page 38
- **Delivery Settings in the User Interface** on page 38
- **Working with Delivery Rules** on page 43
- **Rosetta Viewers** on page 52

## Understanding Delivery

The Rosetta system enables users to view objects such as intellectual entities, representations, and files that are stored in the Rosetta system. These objects can be viewed by staff users (for example, Assessors viewing content deposited by Producer Agents) as well as external users (for example, a reader with a subscription to the library), also referred to as content consumers.

The diagram below illustrates the organization of the components that enable content delivery.

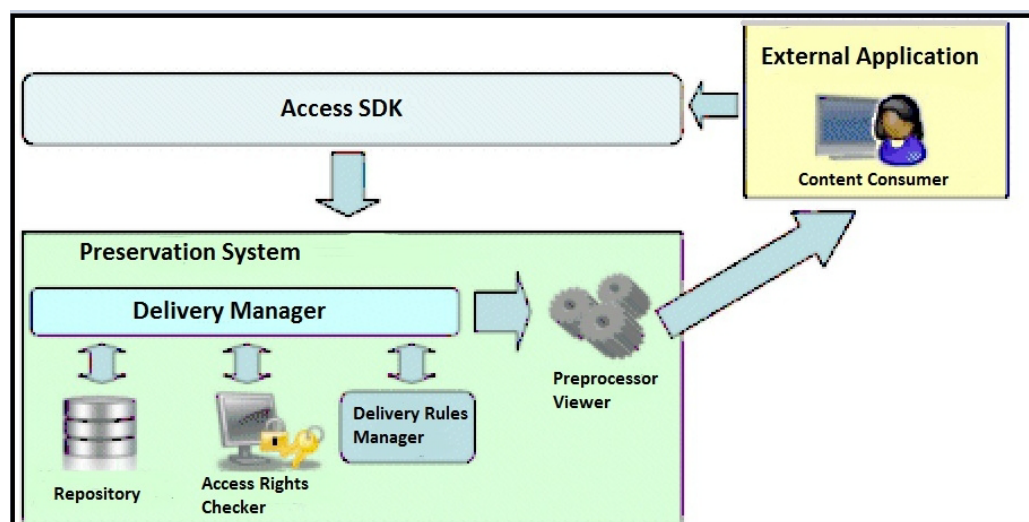


Figure 15: Delivery Information Flow

The delivery flow consists of the following stages:

- 1 A content consumer uses an external application to request a content object from the Rosetta system.
- 2 The external application sends the request to the Delivery Manager.
- 3 The Delivery Manager retrieves the content from the repository.
- 4 The Access Rights Checker determines whether the content consumer has the appropriate privileges to view the requested content object.
- 5 If the content consumer possesses the necessary viewing access rights, the system determines whether there are concurrent user access rights set for the IE. If so, the Access Rights Checker determines the number of copies currently in use by other users. If the number is less than the maximum allowed at one time, the user is registered as a viewer of the IE, the IE is delivered to the user, and one of the available open copies becomes unavailable. If all available copies are in use, the user is asked to wait and try again.
- 6 The Delivery Rules Manager verifies the input parameters of the content object (for example, whether the object is an IE, a representation, or a file), and determines which representation profile should be used to display the content object.
- 7 The selected representation is prepared to be viewed by the viewer. The viewer might require the representation or file to be processed by a component called a pre-processor, which is a plug-in that migrates the files or the metadata of the object.

- 8 When the viewer preprocessor finishes processing the content object, the object is redirected to the viewer, either an internal viewer bundled with Rosetta or an external viewer that resides outside of Rosetta.
- 9 The resource discovery channel (for example, Primo) or OPAC displays the content to the content consumer.
- 10 If concurrent user access rights are being applied: While the user has the IE checked out, the viewer and server exchange information about the user's activity related to the IE. If no activity occurs within a set amount of time (by default, two minutes), the user is disconnected and the IE becomes available to another user.

## Delivery Components

The following components are used in the content delivery process:

- Delivery Manager (see [About the Delivery Manager](#) on page 37)
- Viewer (see [Rosetta Viewers](#) on page 52)
- Viewer preprocessor (see [About Viewer Preprocessors](#) on page 70)

### About the Delivery Manager

The Delivery Manager consists of the following components:

- [Access Rights Checker](#)
- [Delivery Rules Manager](#)

#### *Access Rights Checker*

When Producer Agents deposit content, they select an access rights option among the options defined by staff users. For example, a Producer Agent can select the option that grants access to a specific group of content consumers.

The Access Rights Checker determines whether the content consumer who requested the content has the appropriate rights to view this content. If the content consumer does not have the relevant access rights, a warning message is displayed.

#### *Delivery Rules Manager*

Delivery rules define how the requested content object is to be delivered to the content consumer. These rules are configured by an Administrator.

For each delivery rule, an Administrator defines the input parameters of a content object (such as IE entity type) and output parameters (Representation Profile). The output parameters are applied if the actual input parameters of the

content object match the input parameters of the existing delivery rule. (For more information on how the content object is displayed, see [Rosetta Viewers](#) on page 52.)

## Delivery Rules

Delivery rules are used by Rosetta to match the requested IE, representation, or file with the most appropriate viewer.

The following features characterize current Delivery rules:

- Separate lists for IE and file Delivery rules (but no rules for representations)
- Representation Profiles and viewers managed through the Rosetta UI and not through a mapping table (as was the case with the viewing profile in earlier versions).
- Integration of more than one IE viewer to view the whole representation or even a group of representations (such as METS ALTO), rather than having to read one file at a time from the METS file.

### Example of Delivery Rules Use

The following example illustrates the delivery rules:

The institution uses Rosetta to preserve a collection of digitized manuscripts. Each manuscript is an IE with three representations:

- TIFF images (Preservation Master)
- JPEG2000 images (Modified Master)
- JPEG images (Derivative Copy) for some of the IEs and one PDF file (Derivative Copy) for the other IEs

Using the IE Delivery rules, the System Administrator can define two rules:

- The first rule delivers the JPEG images through a viewer called Book Reader. If there is no such representation, the PDF representation is delivered through a viewer called FlexPaper.
- The second rule delivers the JPEG2000 files only for authorized researchers.

## Delivery Settings in the User Interface

The Delivery settings interface supports this functionality from the following page:

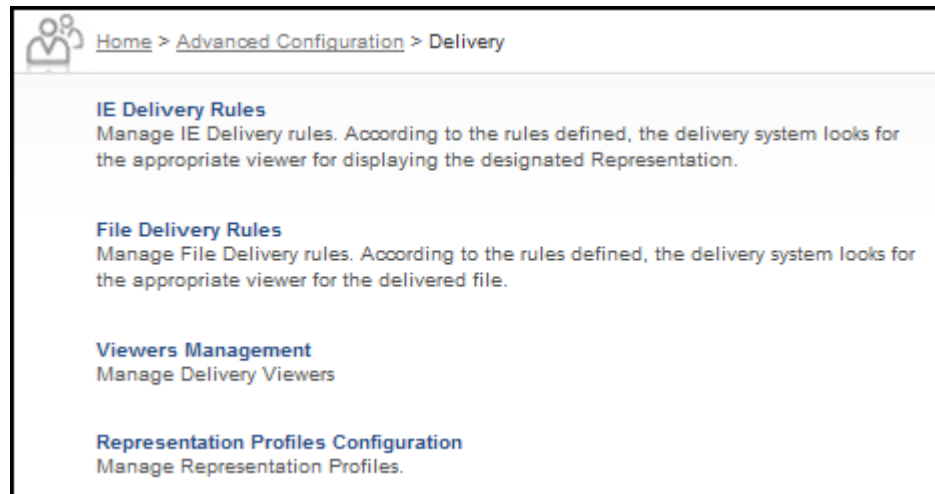


Figure 16: Delivery Page in the Administrative Interface

The list of Delivery configuration items includes:

- **IE Delivery Rules** on page 39
- **File Delivery Rules** on page 42
- List of viewers (**Managing Viewers** on page 53)
- List of representation profiles (**Representation Profiles** on page 47)

## IE Delivery Rules

IE delivery rules allow users to define which viewers will be used to deliver which representations of an IE.

IEs can be grouped by the IE Entity Type attribute, and each group has a similar structure of representations. According to this structure, the System Administrator can define the priority for delivering the representations and the viewer that should be used for each representation(s).

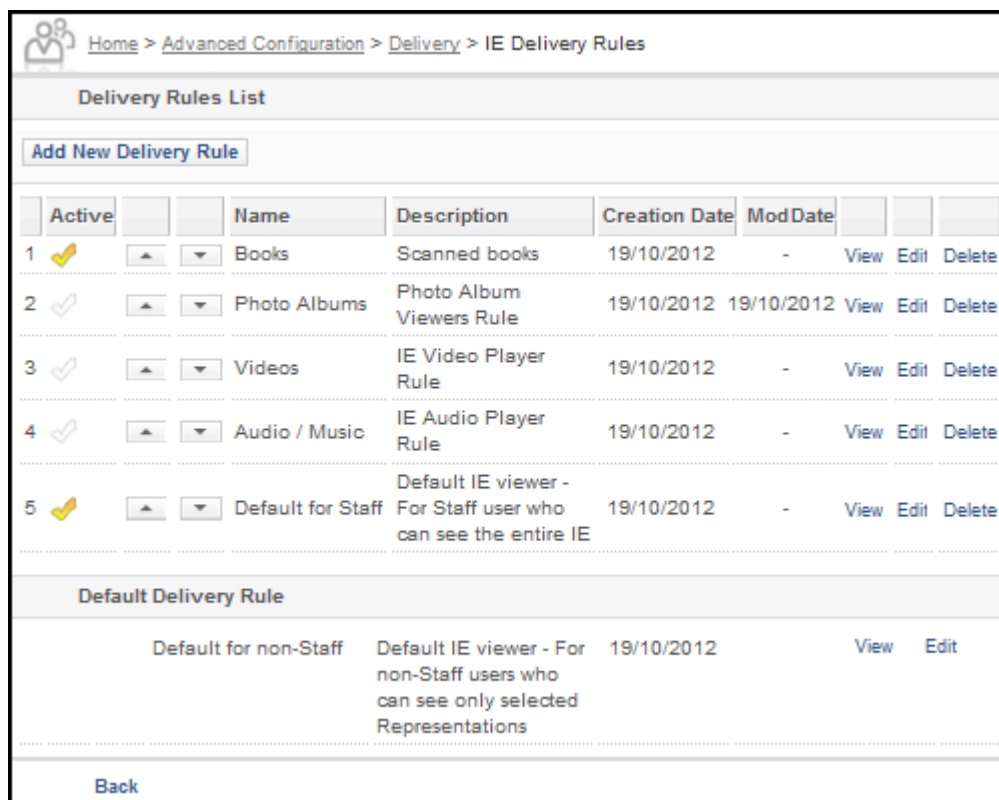
Every time an IE is requested, the Delivery Manager finds the matching rule based on the input parameters. Then the Delivery Manager attempts to match the first Representation Profile to one of the representations (or to a group). If a match is not found, the next Representation Profile is tried, and so on, until there is a match.

When a match is found, the representation is delivered through the defined viewer.

For each rule, there is a default output that delivers the default representation (for example, Preservation Master) through the default General IE Viewer. This viewer displays the structural map of the METS file and a link to each of the files.

### IE Delivery Rules Interface

In the list of Delivery rules, the user can set the order by which the system attempts to match the rules. The up and down arrow buttons (see [Figure 17](#)) can be used to change the order of the rules. The first rule is considered first, then, if there is no match, the second, and so on. Once the system finds a match to the input parameters, it stops looking and uses that rule.



The screenshot shows the 'IE Delivery Rules' configuration page. At the top, there is a breadcrumb trail: Home > Advanced Configuration > Delivery > IE Delivery Rules. Below this is a 'Delivery Rules List' section with an 'Add New Delivery Rule' button. The main content is a table with columns for Active status, Name, Description, Creation Date, ModDate, and action links (View, Edit, Delete). There are five rules listed, each with up and down arrow buttons for reordering. The first rule is 'Books' (Scanned books), the second is 'Photo Albums' (Photo Album Viewers Rule), the third is 'Videos' (IE Video Player Rule), the fourth is 'Audio / Music' (IE Audio Player Rule), and the fifth is 'Default for Staff' (Default IE viewer - For Staff user who can see the entire IE). Below the main table is a 'Default Delivery Rule' section with one entry: 'Default for non-Staff' (Default IE viewer - For non-Staff users who can see only selected Representations). A 'Back' button is located at the bottom left of the interface.

	Active		Name	Description	Creation Date	ModDate			
1	<input checked="" type="checkbox"/>	▲ ▼	Books	Scanned books	19/10/2012	-	View	Edit	Delete
2	<input checked="" type="checkbox"/>	▲ ▼	Photo Albums	Photo Album Viewers Rule	19/10/2012	19/10/2012	View	Edit	Delete
3	<input checked="" type="checkbox"/>	▲ ▼	Videos	IE Video Player Rule	19/10/2012	-	View	Edit	Delete
4	<input checked="" type="checkbox"/>	▲ ▼	Audio / Music	IE Audio Player Rule	19/10/2012	-	View	Edit	Delete
5	<input checked="" type="checkbox"/>	▲ ▼	Default for Staff	Default IE viewer - For Staff user who can see the entire IE	19/10/2012	-	View	Edit	Delete

Default Delivery Rule					
	Default for non-Staff	Default IE viewer - For non-Staff users who can see only selected Representations	19/10/2012	View	Edit

Figure 17: List of IE Delivery Rules

Users can view, edit, or add a rule using the text links and buttons on the IE Delivery Rules page. These actions open the IE Delivery Rule Details page ([Figure 18](#)).

Home > Advanced Configuration > Delivery > IE Delivery Rules > Delivery Rule Details

**General Information**

Name: Videos Description: IE Video Player Rule

**Input Parameters**

Owner: In [ ] IE Entity Type: In [ Movie ]  
 Staff:  User IDs: In [ ]  
 Browser Type:  Any  Non-Mobile  Mobile  
 Request Parameters: [ ] Add Remove

**Output Parameters**

Add Entry

	Representation Profile	Viewer			
1	Default Representation Profile	IE Video Player	Edit Parameters	Remove	Edit

**Default Rule Output Parameter**

Default Representation Profile	General IE Viewer	Edit Parameters
--------------------------------	-------------------	-----------------

Cancel Save

Figure 18: Delivery Rule Details Page

The IE Delivery Rule Details page includes three parts:

- **General Information:** The unique name and description of the rule.
- **Input Parameters:** Parameters that are matched with attributes of the requested IE, attributes of the user, and attributes of the calling system. If the operator is **In**, the rule engine attempts to match any of the values; a **Not in** condition will be met if none of the values match.
  - IE attributes – includes the IE Entity Type and the Owner fields.
  - User attributes – for example, specific user IDs.
  - System/request attributes – Browser type (mobile, non-mobile), request open parameters (for example, CALLING\_SYSTEM=WEB\_OPAC)
- **Output Parameters:** An ordered list of output pairs. Each pair includes a Representation Profile and a matching viewer.

- The Representation Profile is a set of attributes that define a representation or group of representations that can be viewed as a whole by a dedicated viewer. See [Representation Profiles](#) on page 47 for more details.
- The viewer contains the definition and the parameters of the tool used to deliver the files to the user. The viewer entity contains the URL of the viewer, the plug-in that can be used for processing the files before they are directed to the viewer (VPP), and a unique name and description. See [Rosetta Viewers](#) on page 52 for more details about viewers and their management.

## File Delivery Rules

The file delivery rules are used to match the file’s technical attributes with the appropriate file viewer. This comes into play when a file is requested specifically in a delivery URL, in one of two cases:

- External request - when a file is requested by an external source that holds the file PID and uses it to deliver only the file, without any metadata. For example, `http://rosetta.exlibrisgroup.com:1801/delivery/DeliveryManagerServlet?dps_pid=FL1045&dps_func=stream`
- Internal request – when the representation of an IE is delivered through the General IE viewer, each time the user opens a file for view, and the Delivery Manager uses the file delivery rule to locate the viewer that should be used.

### File Delivery Rules Interface

The file delivery rules are managed separately from the IE rules.

The screenshot shows the 'File Delivery Rules' interface. It features a table with columns for 'Active', 'Name', 'Description', 'Creation Date', and 'Modification Date'. There are seven rules listed, all with 'Active' status. Below the main table is a section for the 'Default Delivery Rule' with one entry: 'Stream Gate'.

File Delivery Rules									
Delivery Rules									
Add New Delivery Rule									
	Active	Name	Description	Creation Date	Modification Date				
1	✔	Video	File Video Player	11/11/2019	-	View	Edit	Delete	
2	✔	Audio	File Audio Player	11/11/2019	-	View	Edit	Delete	
3	✔	XML	XML file viewer	11/11/2019	-	View	Edit	Delete	
4	✔	PDF	PDF flex paper file HTML5 viewer	11/11/2019	-	View	Edit	Delete	
5	✔	IIIF OpenSeadragon Viewer	IIIF OpenSeadragon Viewer	11/11/2019	-	View	Edit	Delete	
6	✔	Videos Viewer	Videos Viewer	11/11/2019	-	View	Edit	Delete	
7	✔	Streaming - HLS	Streaming - HLS	11/11/2019	-	View	Edit	Delete	
Default Delivery Rule									
Name	Description	Creation Date	Modification Date						
Stream Gate	Default viewer based on the users browser	11/11/2019		View	Edit				

Figure 19: List of File Delivery Rules

Users can view, edit, or add a rule using the text links and buttons on the File Delivery Rules page. These actions open the File Delivery Rule Details page (Figure 20).

Figure 20: File Delivery Rule Details Page

## Working with Delivery Rules

The following actions can be performed on the List of Delivery Rules page:

- **Adding a Delivery Rule** on page 43
- **Updating a Delivery Rule** on page 46
- **Deleting a Delivery Rule** on page 46
- **Activating and Deactivating a Delivery Rule** on page 46
- **Re-Ordering the List of Delivery Rules** on page 47

### Adding a Delivery Rule

When adding a new delivery rule, Administrators define general information for the rule (such as the name and description of the rule), input parameters (such as entity type and file format), and output parameters (such as viewer preprocessor and viewer to be used to display the content).

**To add a delivery rule:**

- 1 From the IE or File Delivery Rules page, click **Add Delivery Rule**. The Delivery Rule Details page opens.

Home > Advanced Configuration > Delivery > IE Delivery Rules > Delivery Rule Details

**General Information**

Name  Description

**Input Parameters**

Owner  IE Entity Type

Staff  User IDs

Browser Type  Any  Non-Mobile  Mobile Request Parameters  Add Remove

**Output Parameters**

Add Entry

Representation Profile	Viewer

**Default Rule Output Parameter**

Default Representation Profile General IE Viewer Edit Parameters

Cancel Save

Figure 21: Add Rule Page (IE rule example)

- 2 In the **General Information** pane, enter a name for the rule and, optionally, a description.
- 3 Use the information in **Table 2** for IEs and **Table 3** for File Delivery Rules to enter information in the remainder of the fields. Fields with a magnifying glass and arrow open a selection list in a light box. For these field formats, entries must be selected from the available list(s).

---

**NOTE:**

Any fields without entries will be ignored when the system is looking for a match. All populated fields must match.

---

Table 2. IE Delivery Rule Details

Field	Description
Owner	This Institution that owns the IE
IE Entity Type	This type of resource, such as a book or a movie
Staff	Checked, this indicates that any staff member can be calling the rule
User IDs	The ID of the user calling the rule
Browser Type	Select non-mobile for a standard desktop or laptop, mobile for a smart phone or tablet. External viewers that support an alternative UI for mobile devices can use this parameter.
Request Parameters	An open parameter known to the calling system (for example, Primo or Aleph) and shared with Rosetta (through the Delivery rules)
Add Entry	Button that opens a light box containing options for a Representation Profile and Viewer combination
Representation Profile	The profile for the output object, such as Derivative Copy or Preservation Master
Viewer	The type of viewer (for example, Flex Paper or Photo Album) that delivers the IE in the representation profile

Table 3. File Delivery Rule Details

Field	Description
File Extensions	The typically 3-digit extension identifying the file format
File Mime Types	The classification of a file type used for identifying Internet types. Stands for Multi-purpose Internet Mail Extensions.
File Entity Types	Entity type used by the file/file's format
File Formats	The format of the file as defined by several factors including the numeric fmt/ standardized and used in the Preservation module.
Owner	The institution carrying out the rule.
Viewer	The type of viewer (for example, Flex Paper or Photo Album) that delivers the IE in the representation profile

Table 3. File Delivery Rule Details

Field	Description
Parameters	An open parameter shared by the calling system and Rosetta. Multiple parameters can be added (and removed) as part of the default output parameter.

**4** Click **Save**.

The new delivery rule is saved in the Rosetta system.

## Updating a Delivery Rule

Administrators can update general, input, and output information of an existing delivery rule.

### To update a delivery rule:

- 1 On the List of Delivery Rules page (see [Delivery Rules](#) on page 38), locate the delivery rule you want to update and click **Update**. The Rule Editor page opens.
- 2 Modify the fields you want to update, and then click **OK**.

The delivery rule is updated in the Rosetta system.

## Deleting a Delivery Rule

Administrators can delete an existing delivery rule.

---

### NOTE:

After deleting a delivery rule, it is no longer available to the Rosetta system for matching.

---

### To delete a delivery rule:

- 1 On the List of Delivery Rules page (see [Delivery Rules](#) on page 38), locate the delivery rule you want to delete and click **Delete**. The confirmation page opens.
- 2 Click **OK**.

The delivery rule is deleted from the Rosetta system.

## Activating and Deactivating a Delivery Rule

Administrators can activate or deactivate a delivery rule. After deactivating a delivery rule, it is no longer available to the Rosetta system for matching.

On the List of Delivery Rules page, the delivery rule's status is indicated by the check mark in the **Active** column:

- Yellow - The delivery rule is active.
- Grey - The delivery rule is inactive.

#### To activate or deactivate a delivery rule:

- 1 On the List of Delivery Rules page (see **Delivery Rules** on page 38), locate the delivery rule you want to activate or deactivate.
- 2 In the **Active** column, click the check mark. The check mark in the **Active** column indicates the new status.

The delivery rule is changed from active to inactive, or from inactive to active.

## Re-Ordering the List of Delivery Rules

To define the viewer, viewer profile, and viewer preprocessor that must be used for a specific content object, the Rosetta system compares the input parameters defined in a delivery rule with the parameters of the content object.

The delivery rules are analyzed in the same order as they are displayed on the List of Delivery Rules page. The Rosetta system uses the first delivery rule found that matches the parameters of the content object.

An Administrator can re-order delivery rules to change their priority.

#### To re-order the list of delivery rules:

On the List of Delivery Rules page (see **Delivery Rules** on page 38), select the rule, and then use the up and down arrows to change the rule's priority.

The Rosetta system now analyzes the delivery rules in the newly defined order.

## Representation Profiles

The Representation Profile is a set of attributes that define a representation or group of representations which, based on their content, should be viewed by a dedicated viewer that can handle them as a whole.

The following are two examples:

- a representation that contains the JPEG images of a scanned book, which can be delivered through the Book Reader – see the example below
- a set of images held in one representation and a METS ALTO file that is held in a different representation. The Representation Profile can be defined so it includes these two representations and the METS-ALTO viewer will deliver all the relevant files from both representations.

The Representation Profiles are managed in the List of Representation Profiles:

The screenshot displays the 'Representation Profile Configuration' interface. At the top, there is a search bar with 'Find:' and 'in: All' dropdown menus, and a 'Go' button. Below the search bar is an 'Add Representation Profile' button and a record count of '1 - 9 of 9 Records'. The main content is a table with 9 rows, each representing a profile. Each row has columns for 'Name', 'Description', and three action buttons: 'View', 'Edit', and 'Delete'. Below the table, there are two sections: 'Default Representation Profile' and 'IIIF Manifestation Profile', each containing a table with 'Name', 'Description', and 'View/Edit' buttons. At the bottom left, there is a 'Back' button.

	Name	Description	View	Edit	Delete
1	Derivative Copy	Derivative Copy Representation (Not in Permanent)	View	Edit	Delete
2	Derivative High	High resolution derivative copies	View	Edit	Delete
3	Derivative Low	Low resolution derivative copies	View	Edit	Delete
4	Derivative Medium	Medium resolution derivative copies	View	Edit	Delete
5	Modified Master	Modified Master Representation (in Permanent)	View	Edit	Delete
6	ALTO	Preservation Master and MODIFIED_ALTO	View	Edit	Delete
7	Preservation Master	Preservation Master Representation (in Permanent)	View	Edit	Delete
8	IIIF Representation Profile	Representation for IIIF manifest	View	Edit	Delete
9	Modified + Derivative	-	View	Edit	Delete

Name	Description	View	Edit
Default Representation Profile	All Representations with various files and formats	View	Edit

Name	Description	View	Edit
IIIF Manifestation Profile	Representation for IIIF manifest	View	Edit

Figure 22: List of Representation Profiles

The Representation Profile includes the attributes of the representation as shown in the details of one profile (Derivative Low, see [Figure 23](#)).

Representation Profile Configuration / Details

**General Information**

\* Name  Description

**Input Parameters**

Single Representation

\* Preservation Type    \* Representation Code

\* Representation Entity Type

**Output Parameters**

Download All  Disallow  All Representations  Selected Representation

Hide Restricted Files

Figure 23: Representation Profile Details

The Input Parameters section includes the following fields:

- **Preservation Type:** The out-of-the-box values of this field are Preservation Master, Modified Master, and Derivative Copy. However, users can add values to the code table and define additional types of representations.
- **Representation Code:** The out-of-the-box values of this field are High, Medium, and Low. This field is used mostly for derivative copies, in order to differentiate between them.
- **Representation Entity Type:** This field has always been part of the Data Model, but it was never used in any of the Rosetta modules. It can be used as another field by which to group representations or to identify specific representations as a profile.

The Output Parameters section includes the following fields:

- **Download All:**
  - Disallow – No download option is available
  - All representations – the Download icon appears that allows you to download all files in the representations.
  - Selected Representations – An option is available that allows you to download the files of the representation that you are currently viewing

- **Hide Restricted Files:** Select to hide files in the viewer to which you are denied access due to an access rights restriction. If cleared, the restricted file names appear in the viewer and a denied access page appears if the file name is clicked.
- **Download File:** Select to display the option to download the original file.

---

**NOTE:**

A process automation task is available for updating representation metadata for a set of representations.

---

During delivery, multiple representations are sorted according to the fields in the chosen Representation Profile: first by Preservation Type, then by Representation Code, and finally by Representation Entity Type. If a field is marked as Any, the field is ignored for sort purposes.

---

**NOTE:**

Logical structmap will precede physical structmap of the same representation.

---

## Delivery XSL Files

---

**NOTE:**

Configuring the display of IE and file metadata is performed using **Delivery Metadata Fields** on page 51.

---

Deposit Managers can define how metadata is displayed or printed for other users by editing XSL files.

For example, a Deposit Manager can edit lines of an XSL file to determine the exact metadata to be printed with an IE image. While the default print contains no metadata or additional information, information and additions can be made available to a file when it prints.

Deposit Managers can configure these files using the Delivery XSLs page. To reach this page, follow the path **Deposits > Advanced Tools > Delivery XSL Files**.

The Configuration Files page enables you to view the list of available configuration files and open individual files for editing.

---

**NOTE:**

The Configuration Files page differs in content based on the type of file you select from the **Deposits > Advanced Tools > Delivery XSL Files** menu.

---

Users access individual files by clicking through paths from the Rosetta Management Home page. **Figure 24** follows the path **Deposits > Advanced Tools > Delivery XSL Files**.

Deposits: Delivery XSL Files						
						1 - 7 of 7 Files
	Filename	Description	Updated by	Update Date		
1	delivery_print.xsl	xsl for printing a image with metadata	Ex Libris	21/03/2018	View	Edit
2	descriptive_dc.xsl	xsl for displaying sip descriptive dc	Ex Libris	21/03/2018	View	Edit
3	file.xsl	xsl for displaying file metadata	admin1	22/03/2018	View	Edit
4	file_metadata.xsl	xsl for displaying file metadata	Ex Libris	21/03/2018	View	Edit
5	ie.xsl	xsl for displaying ie metadata	admin1	22/03/2018	View	Edit
6	mets2manifest.xsl	xsl for transforming an IE to a manifest	Ex Libris	21/03/2018	View	Edit
7	sru_ie.xsl	xsl for transforming an IE to sru response	Ex Libris	21/03/2018	View	Edit

1 - 7 of 7 Files

Back

Figure 24: Delivery XSL Configuration Files

To open a file for editing, click the **Edit** text of the file's row. Once you have opened the XSL page, you can make any alterations to the XSL and click the **Save** button to implement the changes.

## Delivery Metadata Fields

Deposit Managers can define what metadata will be displayed for other users from the IE Metadata and File Metadata sections of the Metadata Delivery Fields page. With the Share URL Field section, you determine from which field Rosetta viewers take the URL when the user clicks the Share icon in the viewer. To reach this page, follow the path **Deposits > Advanced Tools > Delivery Metadata Fields**.

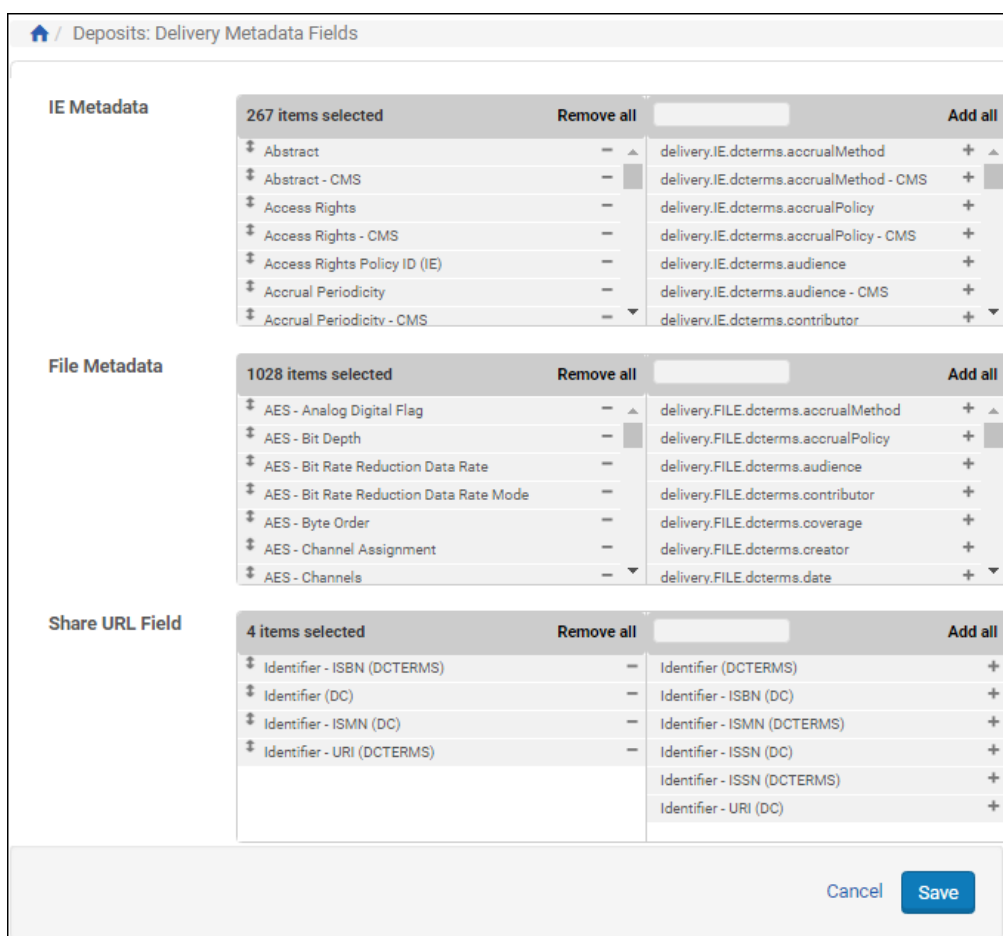


Figure 25: Delivery Metadata Fields

To add or remove delivery metadata fields, simply drag and drop the requested field in the left side of the multi-select widget. You can drag the fields to reorder them. The order the fields appear on this page are the order they appear in Rosetta.

## Rosetta Viewers

Rosetta viewers are used by the Delivery Manager to enable content consumers to view, print, and save objects. Information accessed in this way is read-only and cannot be modified in the viewer.

A viewer displays a representation or a group of representations as defined in the Representation Profile specified by the delivery rules. (For more information, see [Delivery Rules Manager](#) on page 37.)

---

**NOTE:**

The Representation Profile determines which representation(s) of the IE should be delivered. The Delivery Rule finds the matching representation(s) of the processed IE. For example, the first Representation Profile is the Low Resolution Derivative Copy Representation. If it is determined that this doesn't exist, the Preservation Master Representation is delivered.

---

To display different types of content (such as images, text, or video content) for IEs, representations, and files, the Rosetta system provides these different types of viewers out-of-the-box. (Additional viewers can be added and configured.)

The general viewer toolbar and the IE/Rep viewers display a Share icon that displays a URL that you use to share digital files. To prevent the display of the Share icon, enter the parameter `share=false` either in the delivery rule for the file, the configuration of the viewer, or directly on the URL of the file.

## Managing Viewers

Rosetta uses two types of viewers:

- **Bundled:** These viewers are part of Rosetta and can only be viewed by the users. For example, FlexPaper and Book Reader viewers.
- **External:** Users can add new viewers as external viewers. For technical details about external viewers, see [External Viewers](#) on page 69.

The viewer entity includes the following attributes:

- **Name and Description:** for identifying the viewer
- **URL:** for redirecting the files
- **Level:** IE or file
- **VPP (Plugin):** The viewer pre-processor. The tool that is used to fetch the files from the storage (operational or permanent) and the metadata (based on the information in the METS XML file) and to prepare it for the viewer, based on the specific capabilities of the viewer.

### *General IE Viewer for Mixed Content*

An enhanced General IE Viewer is used as the default IE viewer for IEs and representations that contain mixed content (for example, sets of research data, audio albums with music files, and images) or in any other case in which there is no commercial (or in-house) viewer that can handle the set of files.

The General IE Viewer is based on the structural map in the METS XML file, and each file can be viewed separately.

The new General IE Viewer looks like the following:

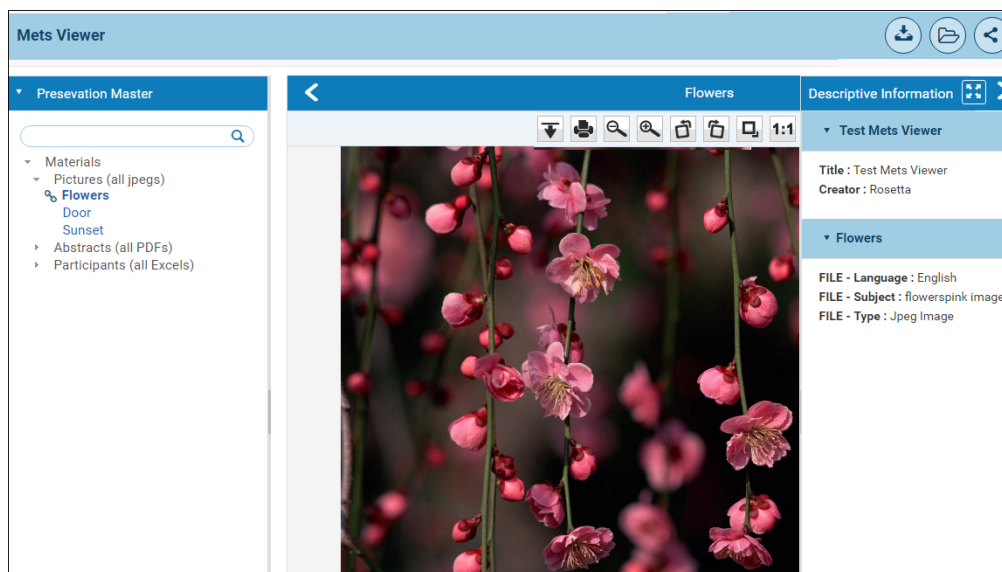


Figure 26: General IE Viewer, Image

The General IE viewer shows one structural map (logical or physical) of one representation at a time. If the General IE viewer receives a list of representations, the representations appear in drop-down drawers on the left pane of the viewer. The user can open each one and select a structural map. The right pane of the viewer displays the descriptive metadata of the file.

From the top-right of the viewer, the user can:

- Click the Download icon to download the files of the IE. If configured, you have the option of downloading a single file or all of the files in the IE. (For information on configuring the Download icon, see [Representation Profiles](#) on page 47.)
- Click the Folder icon to open a list of links to the collections associated with the IE. The collection viewer opens in a new tab.
- Click the Share icon to share the delivery URL of the IE.

When more than one copy of a file is associated with a representation, Rosetta provides the means to navigate multiple images in the same object view. Multiple images are associated through a Group ID and can be browsed through the viewer. Their identification codes allow them to retain their association no matter where they may be distributed in the system or an export.

Object viewers have a table of contents in the left column with an link icon next to items containing links to associated objects. You can link several files by

assigning them the same Group ID in the object Characteristics section of the file level DNX. Hovering over a linked file displays the list of linked files.

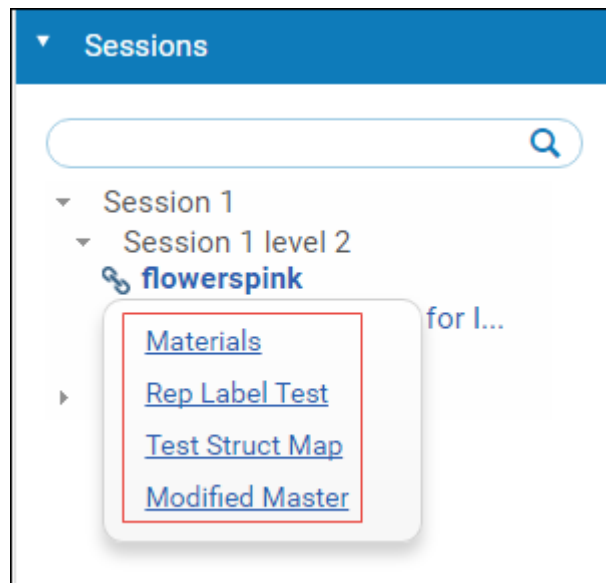


Figure 27: Information for Other Versions

Metadata for the files appears in the right pane.

The IE Viewer is supported for mobile devices. Downloading files is supported for mobile devices with the android operating system.

### ***Article Viewer***

The Rosetta Article Viewer allows you to view PDFs of scholarly articles in Rosetta, and complies with Google Scholar indexing requirements of article metadata and full text. The viewer uses source MD of type=OTHER and subtype=article, according to the specified structure, to generate HTML meta tags in order to comply with Google Scholar requirements. If no such MD is provided, Rosetta uses specified DC fields.

Scholarly material IEs should all belong to one or more collection. These collections should be exposed to Google using a sitemap with deeplinking URLs (for example: <http://rosetta.university.edu:1801/delivery/action/collectionViewer.do?collectionId=15584175>).

You must configure the Article Viewer as the delivery method for scholarly material in order for Google crawlers to reach and index it.

### ***General Representation Viewer for Mixed Content***

An HTML5 viewer that accepts a single representation (provided by the delivery rule representation profile). It can display only formats that are supported by HTML5. For other formats, the viewer supports download only.

Click the Download icon to download the files of the IE. If configured, you have the option of downloading a single file or all of the files in the IE. (For information on configuring the Download icon, see [Representation Profiles](#) on page 47.)

The representation viewer is supported for mobile devices. Downloading files is supported for mobile devices with the android operating system.

For information on configuring the metadata fields that appear in the General Representation Viewer, see the **Metadata Delivery Fields** section of the *Rosetta Staff User's Guide*.

### *Photo Album Viewer*

The Rosetta Photo Album viewer allows you to view images in photo album style by flipping through images. Supported formats are png, gif, and jpg.

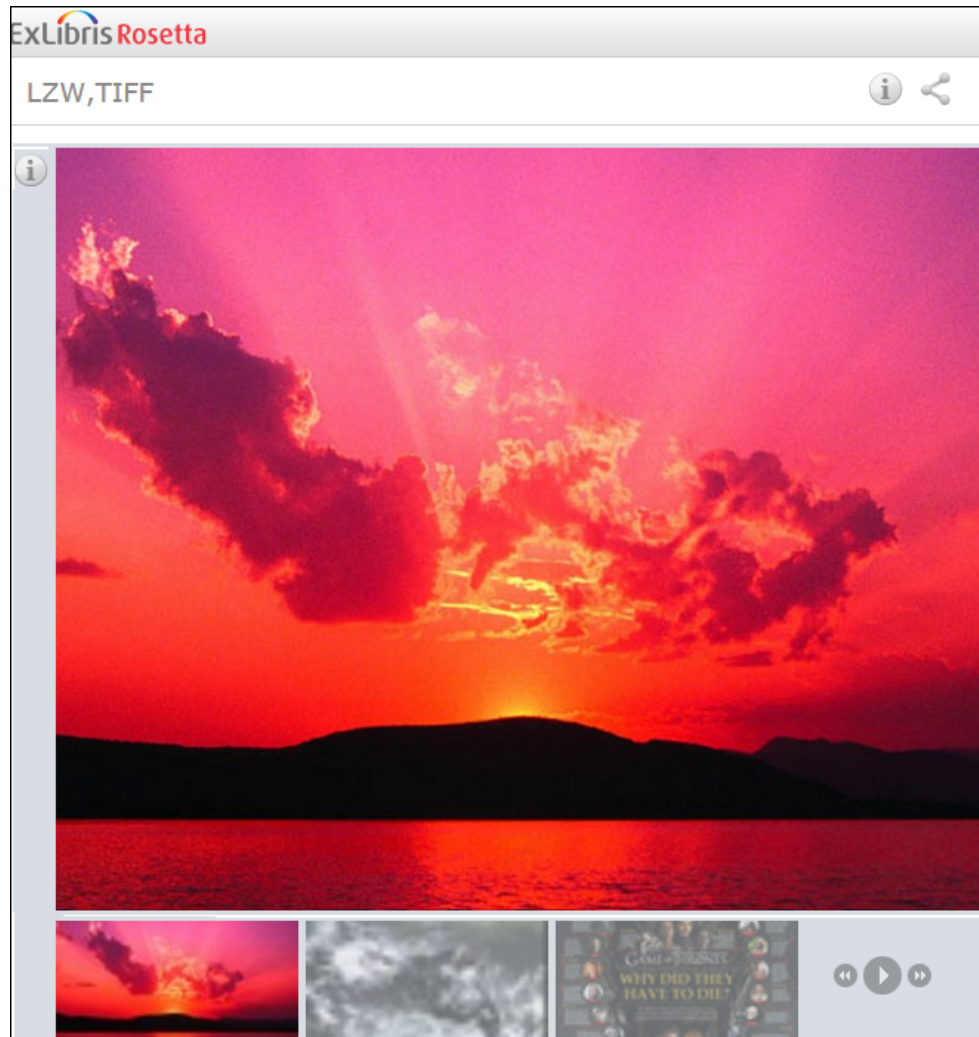


Figure 28: Photo Album Viewer

### *Universal Viewer*

The Universal Viewer has the ability to display and zoom in on high-resolution images and supports formats such as tiff and jpeg2000. You have the option to download the original high-resolution file when you click the Download button. To support the Universal Viewer, Rosetta provides a IIIF image server and publishes a IIIF manifest for representations.

### *Videojs Viewer*

The Videojs viewer is an AV viewer that includes streaming support and allows you to change the speed of the playback.

### ***Streaming Viewer***

The streaming viewer supports streaming video and audio files that were created by the Video to HLS Streaming transformation profile.

### ***OpenSeadragon Viewer***

The OpenSeadragon viewer is a viewer for high-resolution zoomable images. With this viewer images can be rotated and printed. The print function uses the print.xml file that you can configure to include specific metadata.

### ***XSL Viewer***

The XSL viewer displays XML files in HTML by using a stylesheet that you can configure.

### ***FlexPaper Viewer***

The FlexPaper viewer is a viewer to display PDF files.

## **Embedded Viewers**

Rosetta Delivery supports embedding viewers as components in Web pages that display digital objects.

More recently, Rosetta allows configuring the viewers to be embedded in other ways, by setting the parameters of the viewer URL. These parameters control the appearance of the header, toolbar, and footer around the viewer.

When adding to the URL the parameter `embedded=true`, the image appears without the Rosetta header and footer:



Figure 29: Embedded Viewer

To display the object without the title and top toolbar (folder, information, and share icons), an additional parameter of `toolbar=false` must be added to the `embedded=true` parameter (shown above).

### *dps\_func parameter*

The `dps_func` parameter is used for getting access to the file(s) without using the Delivery chrome (e.g. header, footer, toolbar, logo, and background colors). It can be used for getting the thumbnail of the IE (`dps_func=thumbnail`) or the file itself streamed to the user's browser (`dps_func=stream`).

---

#### **NOTE:**

The list of parameters for some of the viewers are documented in **Viewer Parameters** on page 65.

---

### *Image-Based File Viewer*

When the IE or representation contains a single file, this file is displayed without the tree structure on the left.

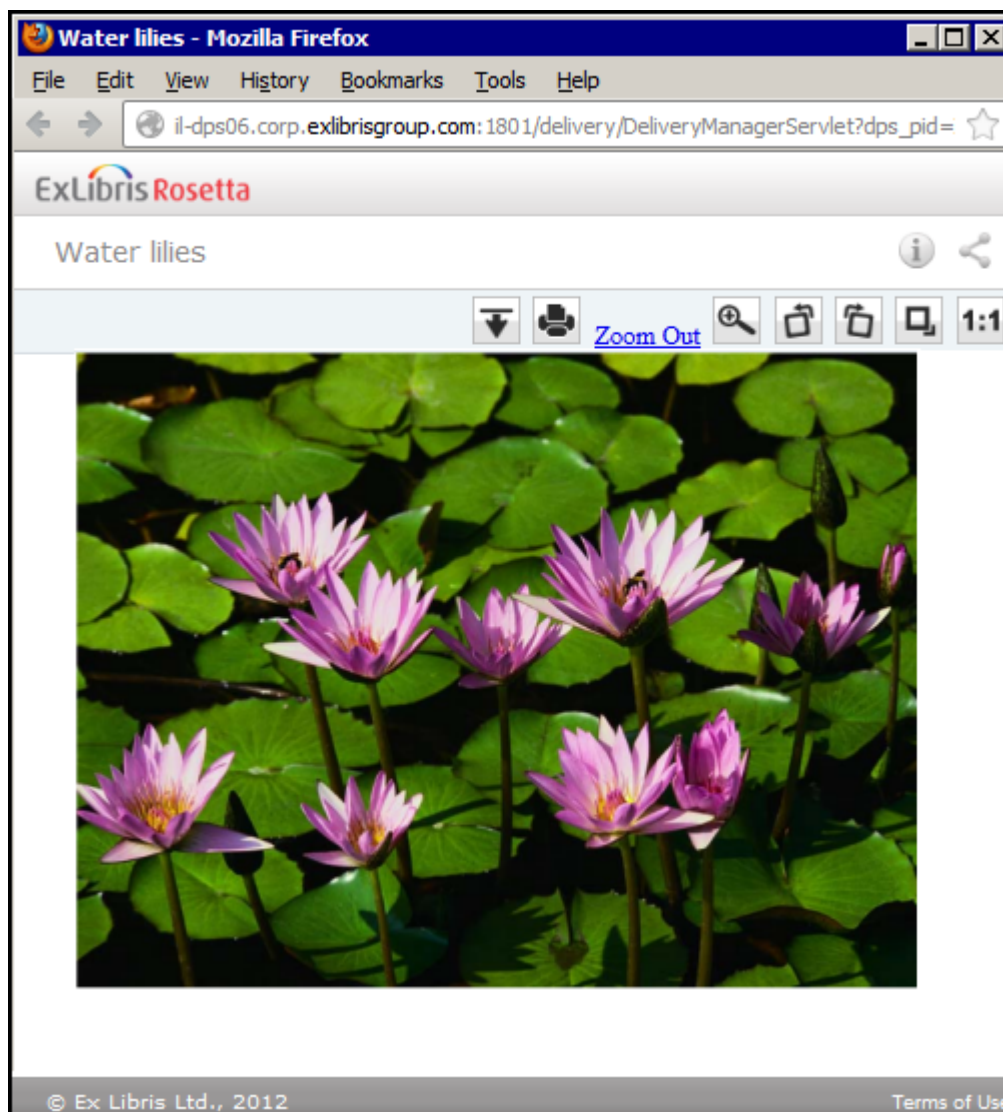


Figure 30: Image-Based File Viewer

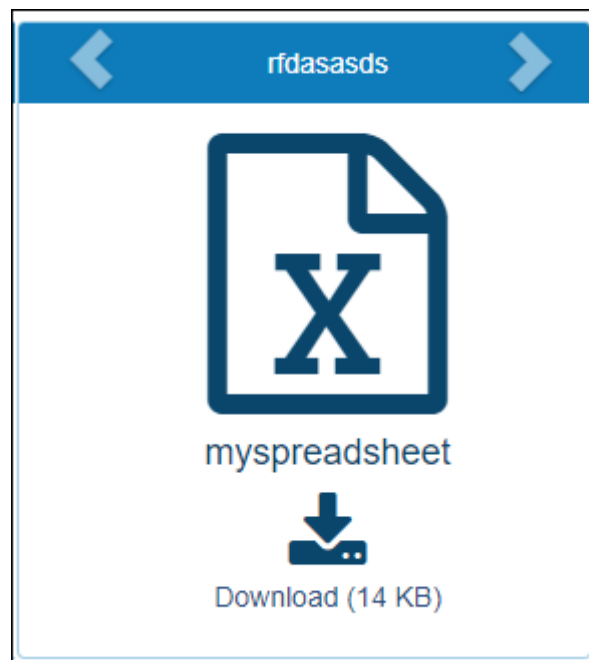
This viewer displays image files and enables users to perform the following actions on the image:

- Zoom in and out
- Rotate 90 degrees in either direction
- Display image metadata
- Open a print-friendly version of the image in a new browser window by clicking the print icon on the toolbar
- Save a copy of the image to their own local or network drive using the download button beside the print button.

### *Web Browser-Based File Viewer*

If there is no viewer that supports the file format of the delivered file, you can configure how Rosetta handles the file. By default, Rosetta's file viewer streams the file to the browser and the user can download it or use a plug-in on the local computer to render the file. For example, Office documents are streamed to the user's browser for download and opened locally on the user's PC.

Alternatively you can configure the file viewer to display a thumbnail (or icon if no thumbnail is available) with a download link. For example:



There are three ways to configure the file viewer to display the download link instead of sending the file to the browser.

- Create a delivery rule for the file (see [File Delivery Rules](#) on page 42) with a parameter of `direct=false`.
- Add the suffix `direct=false` to the URL of the file.
- On the Viewer Management page (**Administration > Delivery > Viewer Management**) add the suffix `direct=false` to the URL field of the viewer.

## External Viewers

### *Data Flow*

The diagram below shows the flow of the delivery request between the user, the Delivery Manager, and the external viewer.

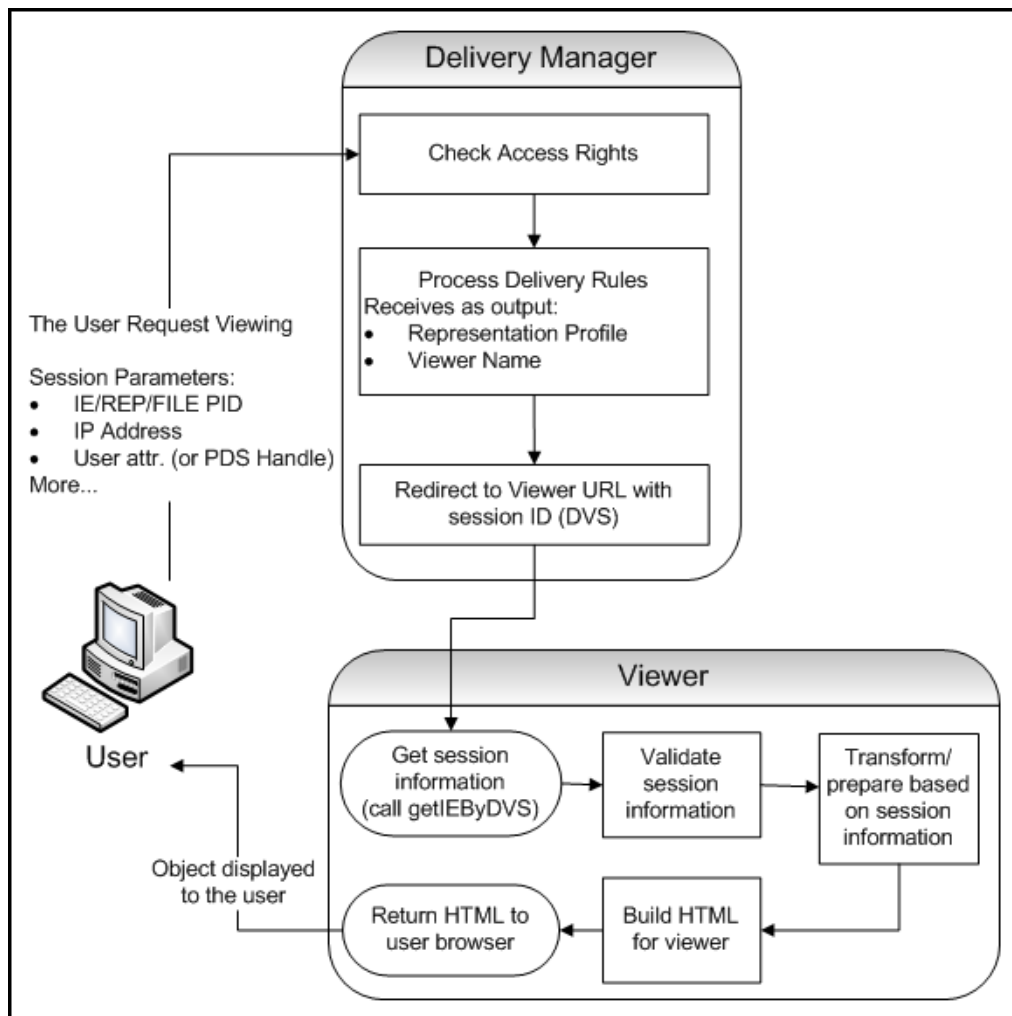


Figure 31: External Viewer, Data Flow

### *Viewer Preprocessor*

In [Figure 31](#), the external viewer obtains all the information from the delivery session.

---

**NOTE:**

If needed, a VPP plug-in can be used by the Delivery Manager to prepare the files for viewing by the external viewer.

---

### *External Viewer Methods*

The two methods described below are part of a Web service:

- **Get IE by DVS Method**

This method is used by the external viewer for getting the content of the IE as it is stored in the Delivery session.

The method uses the session ID (called *dvs*) sent by the Delivery Manager. In response, the delivery session sends the IE (METS XML) as a string. The METS file can be parsed by the IE Parser (which is available in the Rosetta SDK).

The string includes the IE and representation metadata (Source DC, Descriptive, and DNX) and a list of structural maps which include file path and label for each file.

- **Get Full IE by DVS Method**

This method, the `getFullIEByDVS`, returns the full IE including all the information (DNX) on every file.

### *APIs for External Viewers*

The following are examples in which the API is used to integrate an external viewer:

- **Wowza** – Used by an Ex Libris partner for viewing video and audio files. As shown in [Figure 31](#), the Delivery Manager redirects the files to the server on which the viewer resides, and the viewer streams the video or audio file to the user's browser.
- **DFG Viewer** – A custom-made Web service designed by an Ex Libris partner to create an object view outside of Rosetta and independent from any internal Rosetta viewer. It interacts with the Deliver Manager by using the API to retrieve the files (PDF, images) from the delivery session.

### *Adding an External Viewer*

External viewers are added through the Rosetta user interface (UI).

Users must create a new viewer and enter its URL. If the viewer requires specific processing of the IE, a VPP can be plugged in as well using the plug-in management UI.

After adding the viewer record, users can create delivery rules that redirect to the external viewer. For example, viewers such as Wowza can be used for streaming a video file.

---

#### **NOTE:**

All viewers that are not in-house developments (e.g. commercial or open source tools developed by other software developers/companies) are implemented as external viewers and are not part of Rosetta source code.

---

## Customizing the Viewer Header

Delivery viewers use the logo and background colors specified for the IE's institution. For information on how logos and colors are associated with institutions, see [UI Customization Per Institution](#) on page 228.

## Delivery Parameters

The following table describes delivery parameters for URL viewers. These parameters can be added either to the Delivery URL or as the Viewer parameters in the Delivery rule. With the exception of the list specified in the table below, any querystring parameter can be appended to the delivery request (either directly on the request URL or via the delivery rules) and is forwarded to the viewer.

Table 4. Delivery URL Parameters

Parameters	Level	Result
toolbar=true	IE/Rep/File	Default settings including: <ul style="list-style-type: none"> <li>■ Header</li> <li>■ Toolbar</li> <li>■ Viewer iFrame</li> <li>■ Footer</li> </ul>
embedded=false	IE/Rep/File	Default settings including: <ul style="list-style-type: none"> <li>■ Header</li> <li>■ Toolbar</li> <li>■ Viewer iFrame</li> <li>■ Footer</li> </ul>
direct=false	File	A download link is displayed, giving the user the option to download the file. By default, the file is sent to the browser for display or download if display is not possible.
toolbar=false AND embedded=true	IE/Rep/File	IFrame with only keep-alive functionality and the Viewer IFrame
dps_func=stream	File	Stream file
dps_func=thumbnail	IE/Rep/File	Stream thumbnail directly

Table 4. Delivery URL Parameters

Parameters	Level	Result
dps_frame	IE/Rep/File	When false, redirection to an external viewer does not include a Rosetta wrapper.  <b>NOTE:</b> The number of concurrent users is not checked when set to false. Access rights policies that are based on this condition will pass.
dps_func=mets	IE	METS XML

## Viewer Parameters

The following table describes the parameters for the General IE viewer:

Table 5. General IE Viewer Parameters

Name	Default Value	Description
AUTOMATIC_LOADING	True	When opening the IE Viewer, the first file will not be delivered. Can be used when a thumbnail is preferred, or when files are exceptionally large and the user is not expected to necessarily request the first file.
use_arrows	True	Can be used to hide arrows that allow navigation between files in a representation, specifically when the file viewer functionality is affected by their presence.
dps_file={file PID}	First file of the IE	When provided, the viewer opens the requested IE/REP at the requested file.

Table 5. General IE Viewer Parameters

Name	Default Value	Description
toc_pane	show	Possible values: <ul style="list-style-type: none"> <li>■ Show – display the TOC, can be hidden</li> <li>■ hide – hide the TOC, can be opened</li> <li>■ none – no option to display the TOC</li> </ul>
md_pane	show	<ul style="list-style-type: none"> <li>■ show – display the MD pane, can be hidden</li> <li>■ hide – hide the MD pane, can be opened</li> <li>■ none – no option to display MD pane</li> </ul>
search	show	<ul style="list-style-type: none"> <li>■ show – display the search box</li> <li>■ hide, none – do not display the search box</li> </ul>

The following table describes the parameters for the General Representation Viewer:

Table 6. General Representation Viewer Parameters

Name	Default Value	Description
dps_file={file PID}	First file of the Representation	When provided, the viewer opens the requested REP at the requested file.

The following table describes the parameters for the XSL Viewer.

Table 7. XSL Viewer Parameters

Name	Default Value	Description
xsl_file		The XSL stylesheet used to display XML files.

The following table describes the parameters for the FlexPaper Viewer.

Table 8. FlexPaper Viewer Parameters

Parameter	Default Value	Description
read_only	false	When read_only=true, the FlexPaper viewer opens without print functionality. OTB remains with print functionality ('read_only=false').
init_view_mode	portrait	Possible values: <ul style="list-style-type: none"> <li>■ portrait – displays one page at a time</li> <li>■ thumb_view – displays the file as thumbnails</li> <li>■ two_page – displays two pages at a time.</li> </ul>

The following parameters apply to the Video Player Viewer.

Table 9. Viewer Parameters: Video Player - JWPlayer

Name	Description	Example
Volume	The volume the player will start playing. Default value is 50 and it can be between 0 and 100.	volume=75
autoStart	By default you need to press play for a file to start playing. By setting this parameter to true, the file starts playing automatically on load, and if there's a playlist the next file will automatically start after the previous one has finished.	autoStart=True
Metadata	A Boolean value indicating whether or not to activate the metadata plugin that creates a sidebar showing the metadata extracted on the fly. To see its affect add: "metadata=true" to the url.	metadata=true
audioView	By default the audio viewer will only display the player tray. To view visualization effects for audio file playback set this parameter to true.	audioView=true

Table 9. Viewer Parameters: Video Player - JWPlayer

Name	Description	Example
skin	The design of the viewer. the following skins are supported by Rosetta: <ul style="list-style-type: none"> <li>■ kleur.zip</li> <li>■ vector01.zip</li> <li>■ niion.zip</li> <li>■ moderngreen.zip</li> <li>■ anoto.zip</li> <li>■ cassette.zip</li> <li>■ jump.zip</li> <li>■ yellowish.zip</li> <li>■ nature01.zip</li> <li>■ videosmartclassic.zip</li> <li>■ nexus.zip</li> <li>■ grungetape.zip</li> <li>■ snel.zip</li> <li>■ fs40.zip</li> <li>■ playcasso.zip</li> </ul>	skin=kleur

The following parameters apply to the photo album viewer.

**IMPORTANT:**

The Photo Album viewer is strict regarding parameter syntax. For example, no spaces are allowed around the equal sign, and the parameter value must be quoted with single quotation marks.

Table 10. Viewer Parameters - Photo Album

Name	Default Value	Description
transition_speed	2000	Duration of panel/frame transition (in milliseconds)
transition_interval	2000	Delay between panel/frame transitions (in milliseconds)
easing	'swing'	Easing method is used for animations (jQuery provides 'swing' or 'linear', more available with jQuery UI or Easing plugin)

Table 10. Viewer Parameters - Photo Album

Name	Default Value	Description
show_panels	true	Flag to show or hide panel portion of gallery
show_panel_nav	true	Flag to show or hide panel navigation buttons
enable_overlays	true	Flag to show or hide panel overlays
panel_width		Width of gallery panel (in pixels)
panel_height		Height of gallery panel (in pixels)
panel_animation	slide	Animation method for panel transitions (crossfade, fade, slide, none)
panel_scale	crop	Cropping option for panel images (crop = scale image and fit to aspect ratio determined by panel_width and panel_height, fit = scale image and preserve original aspect ratio)
overlay_position	top	Position of panel overlay (bottom, top)
pan_images	true	Flag to allow user to grab/drag oversized images within gallery
pan_style	drag	Panning method (drag = user clicks and drags image to pan, track = image automatically pans based on mouse position)
pan_smoothness	15	Determines smoothness of tracking pan animation (higher number = smoother)
start_frame	1	Index of panel/frame to show first when gallery loads
show_filmstrip	true	Flag to show or hide filmstrip portion of gallery
show_filmstrip_nav	true	Flag indicating whether to display Navigation buttons
enable_slideshow	true	Flag indicating whether to display slideshow play/pause button
autoplay	false	Flag to start slideshow on gallery load
show_captions	true	Flag to show or hide frame captions

Table 10. Viewer Parameters - Photo Album

Name	Default Value	Description
filmstrip_size	3	Number of frames to show in filmstrip-only gallery
filmstrip_style	scroll	Type of filmstrip to use (scroll = display one line of frames, scroll filmstrip if necessary, showall = display multiple rows of frames if necessary)
filmstrip_position	bottom	Position of filmstrip within gallery (bottom, top, left, right)
frame_width	164	Width of filmstrip frames (in pixels)
frame_height	80	Width of filmstrip frames (in pixels)
frame_opacity	0.5	Transparency of non-active frames (1.0 = opaque, 0.0 = transparent)
frame_scale	crop	Cropping option for filmstrip images (same as above)
frame_gap	5	Spacing between frames within filmstrip (in pixels)
show_infobar	false	Flag to show or hide info bar
infobar_opacity	1	Transparency for info bar

The following parameters apply to the JP2000 viewer.

Table 11. Viewer Parameters - JP2000 Viewer

Parameter	Default Value	Description
read_only	false	When read_only=true, the download and print buttons are hidden.

## About Viewer Preprocessors

To display content successfully, viewers (especially third-party viewers) can impose special requirements on content, such as format or file location. For example, if a content consumer requests XML content, an XSL transformation must be performed in order to show the content in a Web browser.

To enable correct display of any content, the Rosetta system prepares the content using viewer preprocessors, which are implemented as plug-ins.

The table below describes the viewer preprocessors that the Rosetta system uses:

Table 12. Viewer Preprocessors

Viewer Preprocessor	Description
XSLViewerPreProcessor	This viewer preprocessor performs XSL transformation of XML files to HTML that is displayed in a Web browser.
DefaultViewerPreProcessor	The requested content can be displayed in a Web browser without any additional transformation.
FullTextViewerPreProcessor	Converts all PDF files in representation into a single HTML file.  Use with the StreamGate viewer to provide a fulltext representation to a harvester (for example, Primo).
StreamingHLSViewerPreProcessor	Prepares the video tar file for streaming format

Viewer preprocessors are provided with the Rosetta system as a part of installation. New preprocessors can be added as plug-ins via the plug-in management UI.



# 5

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## Deposits

This section contains:

- [Automatic Decomposition Rules](#) on page 73
- [Registration Rules](#) on page 76

### Automatic Decomposition Rules

Rosetta automatically determines whether a given compressed file should be extracted in accordance with the automatic decomposition rules set in the system.

To set the automatic decomposition rules, do the following:

- 1 Click the **Deposit** link from the Advanced Configuration page.  
The Deposit configuration page opens.



Figure 32: Deposit Configuration Page

2 Click the **Automatic Decomposition Rules** link.

The Rule List page opens.

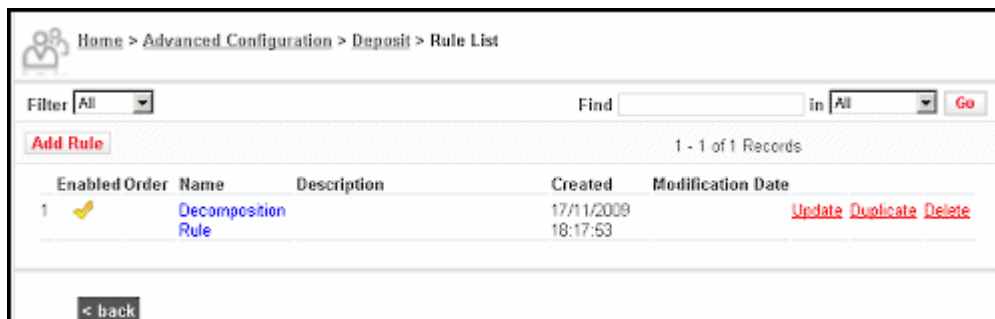


Figure 33: Rule List Page

This page lists all existing automatic decomposition rules.

3 Perform one or more of the following actions. To

- filter the list by status, select the required status from the **Filter** drop-down list (Active or Inactive).
- add a new rule, click the **Add Rule** button.
- edit an existing rule, click the **Update** text of the rule's row.
- duplicate an existing rule, click the **Duplicate** text of the rule's row.
- delete a rule, click **Delete** on the rule's row and confirm the deletion.

For adding, editing, or duplicating a rule, the Rule Details page opens.

Home > Advanced Configuration > Deposit > Automatic Decomposition Rules > Rule Details

**Rule Editor**

Name: Decomposition Rule  
Description:   
Created By: System      Created on: 12/01/2012 13:50:44  
Updated By:      Last Update on:

**Input General Parameters**

Parameter	Operator	Value
File Extension *	=	zip

**Output Parameters:**

Parameter	Result
Extractor Plugin Name *	Unzip with encodin

Cancel      Save

Figure 34: Rule Details Page

- 4 Enter or edit the details of the rule:
  - a In the Rule Editor pane, a name and a description
  - b In the Input General Parameters pane, the extension of the file you want to be automatically extracted in the **Value** field.
  - c Select the appropriate operator from the **Operator** drop-down list (InList, Contains, or =). For detailed instructions and explanations of operators, see [Operators Used in Rule Parameters](#) on page 51.
  - d In the Output Parameters pane, select the desired result from the **Result** drop-down list.
- 5 Click **Save**.

The Rule List page opens. The new rule appears in the list.
- 6 To edit an existing rule, click **Update**.

The Rule Details page opens.
- 7 Enter the updated details of the rule as described in Step 4.
- 8 Click **Save**.

The Rule List page opens. The rule has been updated.

## Registration Rules

When a new Producer is registered in the Rosetta system, the system automatically assigns a Producer profile, Producer group, and status to the new user. Administrators can configure this assignment during advanced configuration using the Deposit Registration Rules mapping table (below).

Home > Advanced Configuration > Deposit > Mapping Tables

**Table Information**

Sub System	PRODUCER_MANAGEMENT	Table Name:	Deposit Registration Rules
Updated by:	Ex Libris	Updated on:	Tue Nov 17 18:20:39 IST 2009
Table Description:	Registration Rules		

**Mapping Table Rows**

	producergroup	rolestatus	producerprofileid	negotiatorid	reason	Description	Last Updated
<input checked="" type="checkbox"/>	Published	ACTIVE	1	107	published	Published	By Ex Libris <a href="#">Delete</a>
<input checked="" type="checkbox"/>	UnPublished	INACTIVE	2	107	unpublished	Unpublished	By Ex Libris <a href="#">Delete</a>

Create a New Mapping Row

producergroup	rolestatus	producerprofileid	negotiatorid	reason	Description	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Create"/>

Figure 35: Deposit Registration Rules Mapping Table

To access this page, from the Advanced Configuration page, click **Deposit > 1st-Time registration rules**. The mapping table for Deposit Registration Rules opens.

Administrators can work with the Deposit Registration Rules mapping table as described in [Working with Mapping Tables](#) on page 238.

# 6

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## E-mail Notifications

This section contains:

- [E-mail Notifications for Deposit Activity](#) on page 77
- [Digital Signature](#) on page 77

### E-mail Notifications for Deposit Activity

Rosetta e-mails a report on deposit activity for a given Producer's account when two conditions are met:

- 1 The Producer or a Negotiator registers the Producer and signs the Producer up to receive regular reports.

This condition is met when a Producer self-registers or when a Negotiator registers a Producer. See [Add Producer Account Process](#) on page 214.

- 2 A Negotiator activates these reports from the back office and sets the start date and the frequency for all Producer reports in the system. See [Modifying the Producer Report Job](#) on page 243.

### Digital Signature

To use a digital signature on e-mail communications, set up the feature as follows:

Obtain the certificate through an external certificate of authority (CA).

Copy the certificate to Rosetta deposit server. Configure the following parameters:

- `digital_certificate`: the location of the certificate
- `digital_certificate_password`: the password for the certificate
- `digital_signature`: flag to turn on/off the digital signature

Home > Advanced Configuration > General > General Parameters

Select Module:

Name	Type	Value
system_time_format	string	HH:mm:ss
server_name	string	localhost
embedded_mode_session_timeout	number	43200
statistic_analyzer_period	number	1200
page_size	number	10
INSTALLATION_CODE	string	DPS
INSTALLATION_DESCRIPTION	string	DPS
units_dir	string	/exlibris/dps/d4_1/profile/units/
phone_regex	string	{{(s)*?d(s)*?}*?d(s)*?}
email_regex	string	^([0-9a-zA-Z]([-.\w]*[0-9a-zA-Z])?@[0-9a-zA-Z]([-.\w]*[0-9a-z
isbn_regex	string	]SBNx20(?=. {13}\$)\d{1,5}([- ]\d{1,7})?1\d{1,6})\d{1}\d{x}\$
url_regex	string	^http://[a-zA-Z0-9\-\ ]+\. [a-zA-Z]{2,3}/AS/?\$
help_url	string	http://il-qadps02.corp.exlibrisgroup.com:1801/
num_of_pages_per_paging	number	3
plugin_directory	string	/exlibris/dps/d4_1/profile/operational_shared/plugins/
plugin_deploy_jar_dir	string	/exlibris/dps/d4_1/profile/operational_shared/plugins/deploy.
plugin_deploy_script_dir	string	/exlibris/dps/d4_1/profile/operational_shared/plugins/bin/
index_supported_date_formats	string	yyyy-MM-dd HH:mm:ss,yyyy-MM-dd,dd/MM/yyyy
object_search_max_count	number	10000
object_search_cache_size	number	1000
disable_sync	boolean	<input type="checkbox"/> false
digital_certificate	string	@@@@@@/profile/DigitalPreservationSystem.pfx
digital_certificate_password	string	Password
digital_signature	string	<input type="checkbox"/> false

Figure 36: Digital Signature Option on General Parameters Page

# 7

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## Repository-Related Configurations

This section contains:

- **Tasks, Task Chains, and Processes** on page 79
- **Configuring Metadata** on page 91
- **Utilities and Files** on page 98
- **General Settings for Repositories** on page 109
- **Configuring Sequences** on page 115
- **Configuring Persistent Identifiers** on page 117
- **Configuring Persistent Identifiers (Deprecated)** on page 122

### Tasks, Task Chains, and Processes

This section contains:

- **Introducing Process Management** on page 79
- **Managing Tasks** on page 80
- **Managing Processes** on page 85

#### Introducing Process Management

After Producer Agents deposit their content to the Rosetta system, the system performs various operations to process this content. Administrators can control the processing by configuring processing operations and defining content that must be processed.

The Rosetta system organizes the processing operations as follows:

- **Tasks:** individual content-processing operations that the system performs, such as persistent identifier generation and technical metadata extraction.  
Tasks are implemented as Java classes, which are provided with the Rosetta system.  
Administrators can monitor how the tasks are being performed. (For more information on monitoring tasks, see **Part VI, Data Managers**, of the *Rosetta Staff User's Guide*.)
- **Task chains:** an ordered series of tasks that the Rosetta system performs.  
Task chains are created and configured by Administrators.  
In addition, several common task chains (such as validation stack) are predefined in the Rosetta system.
- **Processes:** task chains that the Rosetta system performs on a set of objects.  
Processes are created and configured by Administrators. (For more information on configuring processes, see **Managing Processes** on page 85.)

## Managing Tasks

This section contains the following topics:

- **About Tasks** on page 80
- **About Task Chains** on page 81

### *About Tasks*

A task is an external utility used by Rosetta to manipulate objects stored in the system. (For more information about utilities, see **Utilities and Files** on page 98.) Each task works on one IE at a time.

Tasks cannot be created through the UI. However, some tasks can be configured by users and have different parameters.

Some tasks are built around software plug-in tools, and users can install new plug-ins to be used by existing tasks.

The Create Derivative Copy task uses the migration plug-in mechanism to create derivative copies out of preserved files. See **Utilities and Files** on page 98 below for information about how to configure this task.

Examples of tasks are as follows:

- Tasks using plug-ins – Technical metadata extraction, Generic DOI generator
- Tasks not using plug-ins – CMS update task, Export IE

- Create Derivative Copies tasks using tools that are not managed as plug-ins: Tools managed using a mapping table and set of rules.

Administrators can combine tasks into task chains. (For more information about task chains, see [Tasks, Task Chains, and Processes](#) on page 79 and [Managing Processes](#) on page 85.)

### *About Task Chains*

Task chains are added, updated, and deleted by the System Administrator and used by Data Managers when they run processes.

Task chains can include one or more tasks. The System Administrator can set the order of tasks in the chain, so one task will be based on the results of another.

---

#### **NOTE:**

Task chains and the tasks that comprise them are available depending on the object level on which you are working. For example, access rights task chains will be available to IEs and Representations but not to files.

---

Task chains are categorized into groups, the purpose of which is twofold:

- 1 Order of task chains – The groups are used for better management of the task chains. The ordering of the task chains into categories can be reflected in reports.
- 2 Validation and prioritization purposes – The task chain group can be used to validate which task chain will be available to the users in the UI. For example, only task chains that belong to the Validation Stack group can be used in the validation stack phase. In addition, the system can manage the priority of a task chain by the process automation module based on the groups (for example, task chains that belong to the Validation Stack group will have a higher priority than the Maintenance task chains).

The groups are as follows:

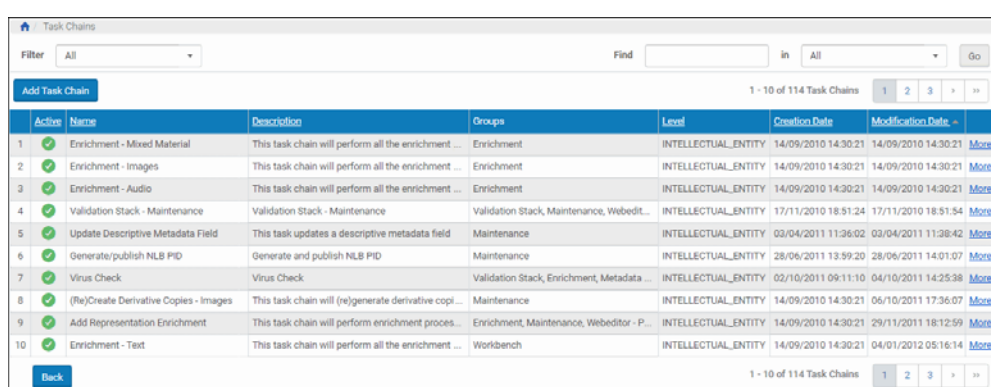
- Validation Stack – Task chains that belong to this group are available for selection in the SIP processing configuration to be used in the validation stack stage.
- Web Editor Staging – Task chains in this group are available for the 3A users (Approver, Assessor and Arranger) as services when opening a SIP during the assessment phase of the SIP processing.
- Preservation – Task chains in this groups can be categorized as Preservation.
- Maintenance – Task chains in this group are available for selection in Processes in the Data Management area.
- Web Editor Permanent - Task chains in this group are available for the Editors and Data Managers as services when opening an IE in the permanent repository.

- Metadata Validation - Task chains in this group can be categorized as metadata validation.
- Enrichment - Task chains that belong to this group are available for selection in the SIP processing configuration to be used in the Enrichment phase.

Task chains and their descriptions can be found on the Task Chain List page.

### Task Chain List page

Task chain groups appear on the Task Chain List page. To access this page, click **General > Task Chains** from the Administration page.



Active	Name	Description	Groups	Level	Creation Date	Modification Date	
1	✓ Enrichment - Mixed Material	This task chain will perform all the enrichment ...	Enrichment	INTELLECTUAL_ENTITY	14/09/2010 14:30:21	14/09/2010 14:30:21	<a href="#">More</a>
2	✓ Enrichment - Images	This task chain will perform all the enrichment ...	Enrichment	INTELLECTUAL_ENTITY	14/09/2010 14:30:21	14/09/2010 14:30:21	<a href="#">More</a>
3	✓ Enrichment - Audio	This task chain will perform all the enrichment ...	Enrichment	INTELLECTUAL_ENTITY	14/09/2010 14:30:21	14/09/2010 14:30:21	<a href="#">More</a>
4	✓ Validation Stack - Maintenance	Validation Stack - Maintenance	Validation Stack, Maintenance, Webedit...	INTELLECTUAL_ENTITY	17/11/2010 18:51:24	17/11/2010 18:51:54	<a href="#">More</a>
5	✓ Update Descriptive Metadata Field	This task updates a descriptive metadata field	Maintenance	INTELLECTUAL_ENTITY	03/04/2011 11:26:02	03/04/2011 11:26:42	<a href="#">More</a>
6	✓ Generate/publish NLB PID	Generate and publish NLB PID	Maintenance	INTELLECTUAL_ENTITY	28/06/2011 13:59:20	28/06/2011 14:01:07	<a href="#">More</a>
7	✓ Virus Check	Virus Check	Validation Stack, Enrichment, Metadata ...	INTELLECTUAL_ENTITY	02/10/2011 09:11:10	04/10/2011 14:25:38	<a href="#">More</a>
8	✓ (Re)Create Derivative Copies - Images	This task chain will (re)generate derivative copi...	Maintenance	INTELLECTUAL_ENTITY	14/09/2010 14:30:21	06/10/2011 17:36:07	<a href="#">More</a>
9	✓ Add Representation Enrichment	This task chain will perform enrichment proces...	Enrichment, Maintenance, Webeditor - P...	INTELLECTUAL_ENTITY	14/09/2010 14:30:21	29/11/2011 18:12:59	<a href="#">More</a>
10	✓ Enrichment - Text	This task chain will perform all the enrichment ...	Workbench	INTELLECTUAL_ENTITY	14/09/2010 14:30:21	04/01/2012 05:16:14	<a href="#">More</a>

Figure 37: Task Chain List Page

### Adding and Editing Task Chains

New task chains can be created by clicking the **Add Task Chain** button on the Task Chain List page, then entering values in the fields on the Task Chain Details page (see below). You can also edit existing task chains by clicking the **Update** link of the task chain's row. To create a task chain based on an existing task chain, click the **Duplicate** link of the task chain's row.

#### To create or edit a task chain:

- 1 From the Administration page, click **General > Task Chains**.  
The Task Chain List page opens (see [Figure 37](#)).
- 2 Click the button that describes what you want to do: **Add Task Chain**, **Duplicate** (an existing task chain), or **Update** (an existing task chain).  
The Task Chain Details page opens (see [Figure 38](#)). For new task chains, the fields are empty. For updates or duplicates, most or all of the fields have entries.
- 3 Enter information in the fields or change information, as needed:
  - Enter a name for the task chain and a description for what it does.

- Select a Status (active or inactive) from the drop-down list.
- Select the object level (IE, File, or Representation) to which you want this task chain to apply.
- Select the group(s) to which this task chain applies.

---

**NOTE:**

Tasks assigned to the Maintenance – Advanced group are only available for users with the Manager Full role.

---

Home / Task Chains / Details

Task Chain ID:      Created By:      Created On: 10/09/2019 14:42:01  
Updated By:      Updated On:

### General Information

\* Name

\* Description

\* Status       Status Date 10/09/2019

\* Task Chain Level

\* Groups:

- Preservation
- Maintenance
- Validation Stack - Use file level tasks only
- Maintenance - Advanced
- Workbench
- Webeditor - Staging
- Enrichment
- Move To Permanent
- Metadata Validation
- Webeditor - Permanent

Task List    Task Parameters

Add Task

Order	Name	Description	Level	Next Step On Failure
-------	------	-------------	-------	----------------------

Cancel    Save

Figure 38: Task Chain Details page, update mode

- 4 To assign a task to the chain, click the **Add Task** button.  
The Task List page opens with a list of all available tasks.

	Name	Description	Level	Privilege Group	Creation Date	Modification Date	
1	Add Provenance Event for Delete IE	Add provenance event for deleting IE	INTELLECTUAL_ENTITY	FULL	14/09/2010 14:30:21	14/09/2010 14:30:21	View
2	Add Representation Bitstream	Extract technical metadata from bitstream in added representation	FILE	FULL	14/09/2010 14:30:22	14/09/2010 14:30:22	View
3	Add Representation Checksum	Runs filey check on files in added representation	FILE	FULL	14/09/2010 14:30:21		View
4	Add Representation Format Identification	Runs format identification on files in added representation	FILE	FULL	14/09/2010 14:30:21		View
5	Add Representation Risk Identification Task	Runs risk identification on files in added representation	FILE	FULL	14/09/2010 14:30:22		View
6	Add Representation TechMD extraction	Extract technical metadata from files in added representation	FILE	FULL	17/07/2014 19:16:18	17/07/2014 19:16:18	View
7	Add Representation TechMD extraction	Extract technical metadata from files in added representation	FILE	FULL	17/02/2011 09:19:19	17/02/2011 09:19:19	View
8	Alternative Automatic Evaluation	Alternative Automatic Evaluation	INTELLECTUAL_ENTITY	FULL	14/09/2010 14:30:22	14/09/2010 14:30:22	View
9	Assign Access Rights	Assign an access rights policy	INTELLECTUAL_ENTITY	FULL	14/09/2010 14:30:21	14/09/2010 14:30:21	View
10	Assign AR Policy to Files	Assign an Access Rights Policy to Files	FILE	FULL	19/12/2018 08:38:22		View

Figure 39: Task List Page

- 5 Browse or search the Task List page for the task you want to add. When you find it, select it and click the **Add** button.  
The task appears below the **Task List** tab on the Task Chain Details page. Repeat the steps for adding a task as needed.
- 6 For each task you have added to the list:
  - Use the **Set order** up and down arrows to change the order of tasks that the task chain performs.
  - Select **Next** or **End** for Next Step On Failure. This determines what the chain will do if this task fails, continue to the next task (**Next**) or finish (**End**).

**NOTE:**

This setting only determines the behavior between tasks and not the behavior of the taskchain itself, which fails in the event of any task failure.

- To delete a task from the task list, click the **Delete** text in the task's row.
- 7 Click the **Task Parameters** tab and enter any parameters needed for the tasks you chose.
  - 8 When you have set up the tasks and parameters for the task chain, click the **Save** button.

Your new or edited task chain appears on the Task Chain page.

## Managing Processes

This section contains the following topics:

- **About Processes** on page 86
- **Accessing the Process List Page** on page 86

- [Creating a New Process](#) on page 87
- [Updating Process Scheduling](#) on page 90
- [Updating Sets in a Process](#) on page 91

### About Processes

A process is a task chain that the Rosetta system performs on a set of objects. Authorized users can manage processes by selecting a task chain and a set that exist in the system.

### Accessing the Process List Page

The Process List page enables staff users to work with processes. This includes adding and scheduling processes.

#### To access the Process List page:

Click the **Data Management** link on the Management Home page, then click **Manage Processes**. The Process List page opens.

ID	Name	Task Chain	Group	Scheduling	Status	Date			
1	48689 3668	Migration test	MAINTENANCE	As Soon As Possible	2/3/10	1:49 PM	Duplicate	Update	Update More
2	32524 FastTrack (Rebuild Repository Search Indexes, IE100)	Rebuild Repository Search Indexes	MAINTENANCE	Every Saturday at 20:30:00	12/28/09	9:18 AM	Duplicate	Update	Update More
3	33320 FastTrack (Rebuild Repository Search Indexes, IE1452)	Rebuild Repository Search Indexes	MAINTENANCE	As Soon As Possible	12/30/09	12:27 PM	Duplicate	Update	Update More
4	23130 Thumbnail	Create Operational Thumbnails	MAINTENANCE	As Soon As Possible	11/30/09	10:39 AM	Duplicate	Update	Update More
5	39916 test 1	Metadata Validation	MAINTENANCE	As Soon As Possible	12/31/09	12:19 PM	Duplicate	Update	Update More
6	40689 test 2	Metadata Validation	MAINTENANCE	As Soon As Possible	1/3/10	8:47 AM	Duplicate	Update	Update More
7	40692 test 3	Create Operational Thumbnails	MAINTENANCE	As Soon As Possible	1/3/10	9:19 AM	Duplicate	Update	Update More

Figure 40: Process List Page

The Process List page contains a filter and a simple search, basic information about each process, and a series of actions the user can perform (such as duplicating the process or updating the schedule or set). The **More** text in the final column provides additional actions that can be performed.

### Creating a New Process

Administrators can create a new process to define the actions that the Rosetta system must perform on a specified set of objects. Adding a process consists of the following steps:

- 1 Selecting the task chain that contains the tasks to be performed
- 2 Specifying general information about the process (such as the name of the process)
- 3 Defining the set of objects on which the Rosetta system must perform the tasks defined in the task chain
- 4 Scheduling the process

#### To create a new process:

- 1 On the Process List page (**Data Management > Manage Processes**), click **Add Process**. The Choose Task Chain page opens.

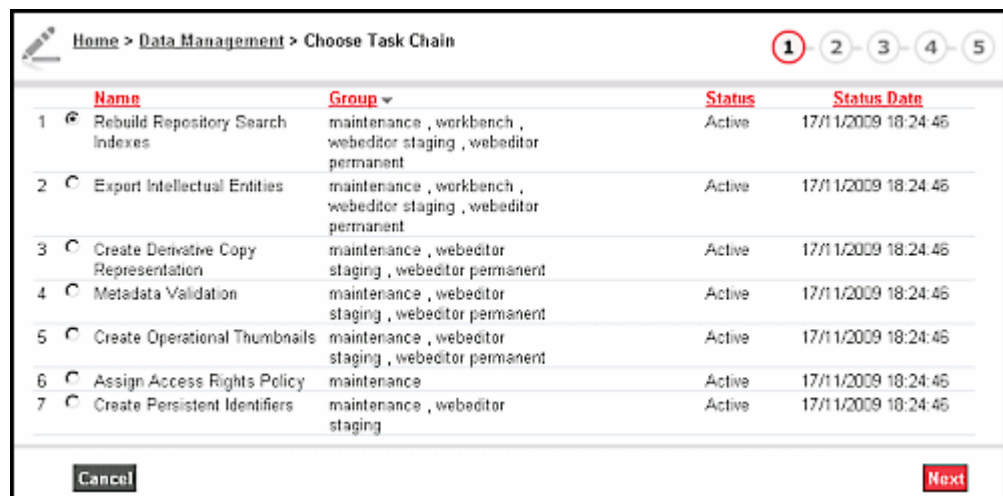


Figure 41: Choose Task Chain Page

- 2 From the list of task chains, select the task chain you want to add.
- 3 Click **Next**. The Complete Parameters page opens.

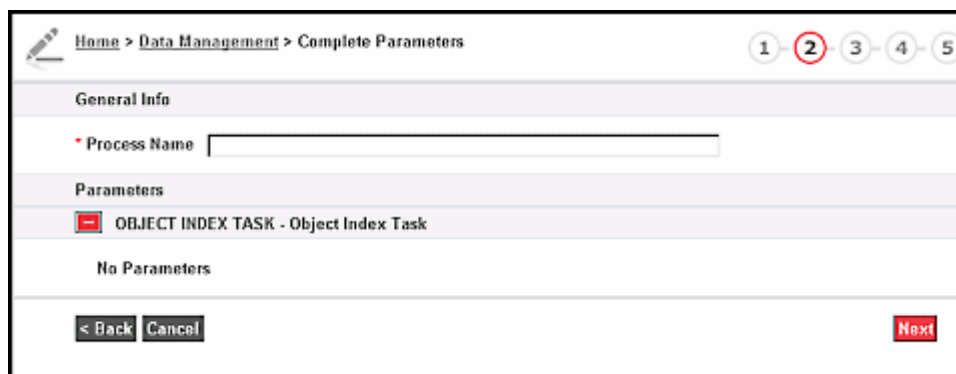


Figure 42: Complete Parameters Page

- 4 In the **Process Name** field, enter the name of the process.
- 5 In the **Parameters** pane, complete the fields as required.

---

**NOTE:**

In the **Parameters** pane, the fields are generated dynamically, based on the task chain configuration.

---

- 6 Click **Next**. The Define Set page opens.

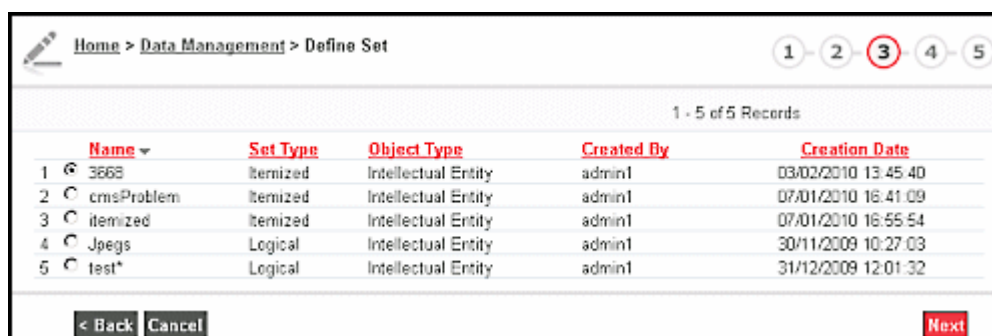


Figure 43: Define Set Page

- 7 In the list of sets, select the set you want to add.
- 8 Click **Next**. The Scheduling page opens.

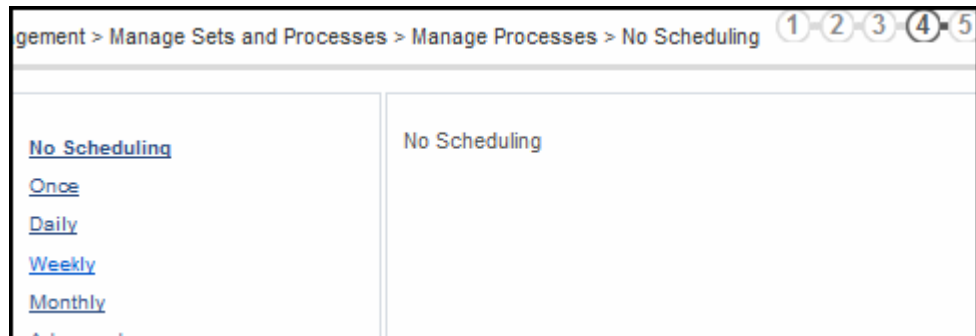


Figure 44: Scheduling Page

- 9 Schedule the process execution by clicking one of the following options:
  - **Scheduling - Once**
  - **Scheduling - Daily**
  - **Scheduling - Weekly**
  - **Scheduling - Monthly**

Fields for the option you select display in the right pane.

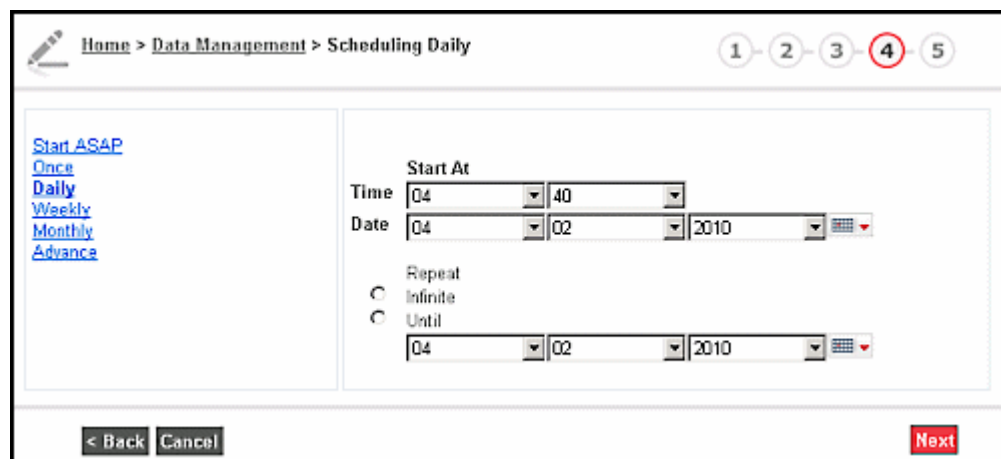


Figure 45: Scheduling - Daily

- 10 Provide the rest of the information as required.
- 11 Click **Next**. The Confirmation page opens.

<b>General Information</b>	
Name	test
<b>Parameters For Tasks</b>	
No Parameters	
<b>Set Information</b>	
Set Id	48676
Name	3668
<b>Scheduling</b>	
Daily At:	Everyday at 04:40:00

< Back Cancel Submit

Figure 46: Confirmation Page

- 12 Review the information on the Confirmation page and do one of the following:
  - If the information is correct, click **Submit**. The process is created and the Process List page opens.
  - If the information is not correct, click **Back** to return to the previous page to make the necessary changes.

The process is saved in the Rosetta system, which performs the process as scheduled.

### *Updating Process Scheduling*

The Rosetta system performs processes as scheduled by staff users. Staff users can update process scheduling at any time.

#### **To update process scheduling:**

- 1 On the List of Processes page (see [Accessing the Process List Page](#) on page 86), locate the process whose scheduling you want to change.
- 2 If you see a linked text to **Update Schedule** in the corresponding row, click it. If you don't see the link, click the **More** text link and the **Update Schedule** link will appear. Click it.

The Scheduling page opens to the current interval and entries.

- 3 Select the new scheduling frequency, if needed, and enter new details in the corresponding form that opens. (See [Creating a New Process](#) on page 87 for options.)
- 4 Click the **Save** button.

The Rosetta system will perform the process according to the new schedule.

### *Updating Sets in a Process*

Administrators can change the sets of objects on which the Rosetta system performs tasks that are defined in the task chain.

To update sets in a process:

- 1 On the Process List page (see [Accessing the Process List Page](#) on page 86), locate the process whose sets you want to change and click **More**. Additional options are displayed.
- 2 Click **Update Set**. The Define Set page opens.
- 3 Select a new set on which the Rosetta system must perform the task chain.
- 4 Click **Next**.

The Rosetta system now performs tasks defined in the task chain on the new set of objects.

## Configuring Metadata

This section contains:

- [Understanding Rosetta Metadata](#) on page 91
- [Configuring the DC Editor](#) on page 92
- [Configuring Intellectual Entity \(IE\) Types](#) on page 93
- [Configuring IE Status](#) on page 94
- [Configuring Subformats](#) on page 95
- [Configuring the OAI Server](#) on page 96

### Understanding Rosetta Metadata

Each content object (such as an intellectual entity (IE), a representation, or a file) in the Rosetta system is accompanied by information — known as metadata — that describes the semantic and technical characteristics of an object. The Rosetta system uses metadata to conduct a more efficient search of content objects, as well as to provide additional information about content to content consumers.

The Rosetta system supports metadata that originates both within the Rosetta system, and in external systems, as described in the following table:

Table 13. Rosetta Metadata Sources

Metadata Source	Description
Local	<ul style="list-style-type: none"><li>■ Descriptive metadata (such as author, title, and subject) is provided by Producer Agents and staff users</li><li>■ Technical metadata (such as file name, MIME type, and file size) is generated automatically by the Rosetta system</li></ul>
External	<p>Any metadata stored in an external system, such as a collection management system (CMS)</p> <p>Assessors and Arrangers can import external metadata to the Rosetta system by assigning a CMS ID to a content object. (For more information, see <b>Assigning a CMS ID to an Intellectual Entity in Part IV, Assessors, Arrangers, and Approvers</b>, of the <i>Rosetta Staff User's Guide</i>.)</p>

## Configuring the DC Editor

Staff users add descriptive information using the DC Editor.

Administrators can edit the DC Editor configuration file to define how the DC Editor must process both the elements and their contents. When editing the configuration file, Administrators can define the following parameters:

- DC elements that must be available to staff users
- Element qualifiers, including the type of the information that the qualifier holds (such as text, integer, or control list)
- The element type and the operators available when searching for the DC field. For example:
  - DATE – Accepts a date value and uses operators such as Before and After.
  - TEXT – (Default) Accepts a text value and uses operators such as Contains Keywords and Starts With.
  - STRING – Accepts a string value and uses operators such as Equals and Does Not Equal.
  - NUMBER – Accepts a number and uses operators Equals, Greater Than, and Less Than.

---

### NOTE:

If you change the element type, a reindexing job must be run for the elements to be searchable under the new type.

---

- Validation routines that must be run on the document, element, and qualifier levels (such as checking whether a staff user completed all mandatory elements)
- Correction routines that must be run on the document, element, and qualifier levels (such as putting the current date into the mandatory Date element that a staff user left empty)

Administrators can access the DC Editor configuration file starting on the Advanced Configuration page and linking through the following pages: **Repository > Metadata > DC Configuration.**

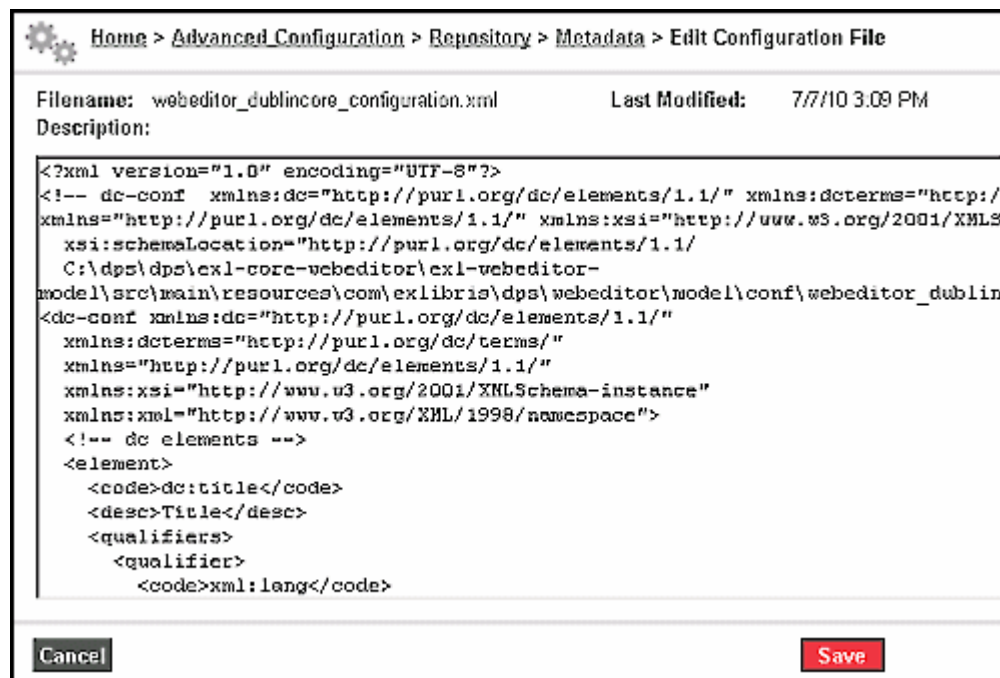


Figure 47: Dublin Core Configuration File

Administrators work with the DC editor configuration file as they do all configuration files. For more information, see [Working with Configuration Files](#) on page 231.

## Configuring Intellectual Entity (IE) Types

When staff users configure the Rosetta system, they select one of the IE types from the list of predefined options. Administrators define these options during advanced configuration, using the IE Type code table. (For more information about accessing the IE Type code table, see [Administration](#) on page 17.)



Figure 48: IE Type Code Table

Administrators work with the IE Type code table as described in [Working with Code Tables](#) on page 234.

## Configuring IE Status

When staff users configure the Rosetta system, they select one of the IE statuses from the list of predefined options. Administrators define these options during advanced configuration, using the IE Status code table. (For more information about accessing the IE Status code table, see [Administration](#) on page 17.)

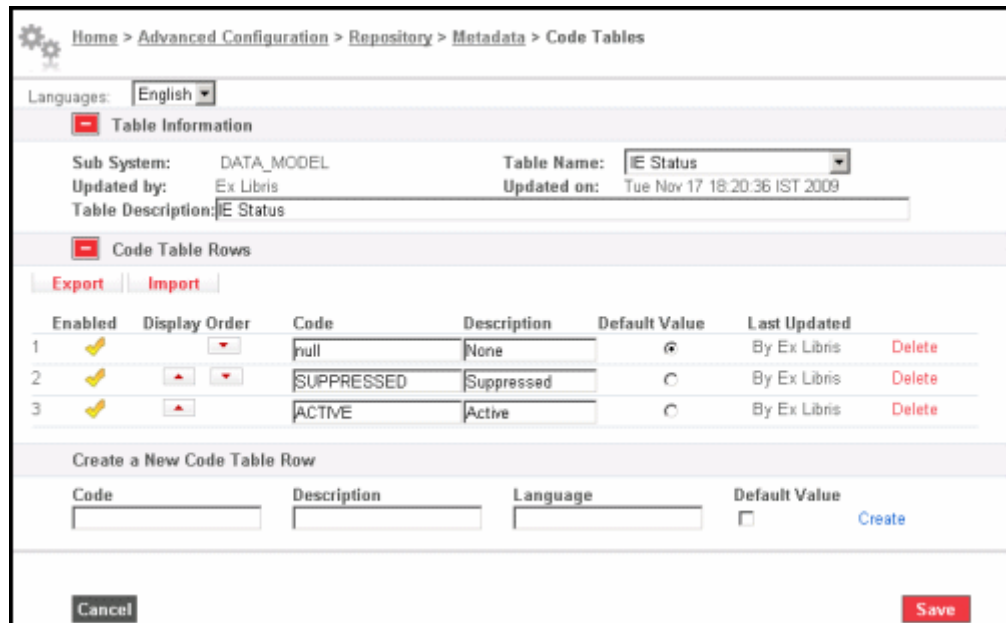


Figure 49: IE Status Code Table

Administrators work with the IE Status code table as described in [Working with Code Tables](#) on page 234.

## Configuring Subformats

When staff users configure the Rosetta system, they select one of the file subformats from the list of predefined options. Administrators define these options during advanced configuration, using the File Subformat code table.

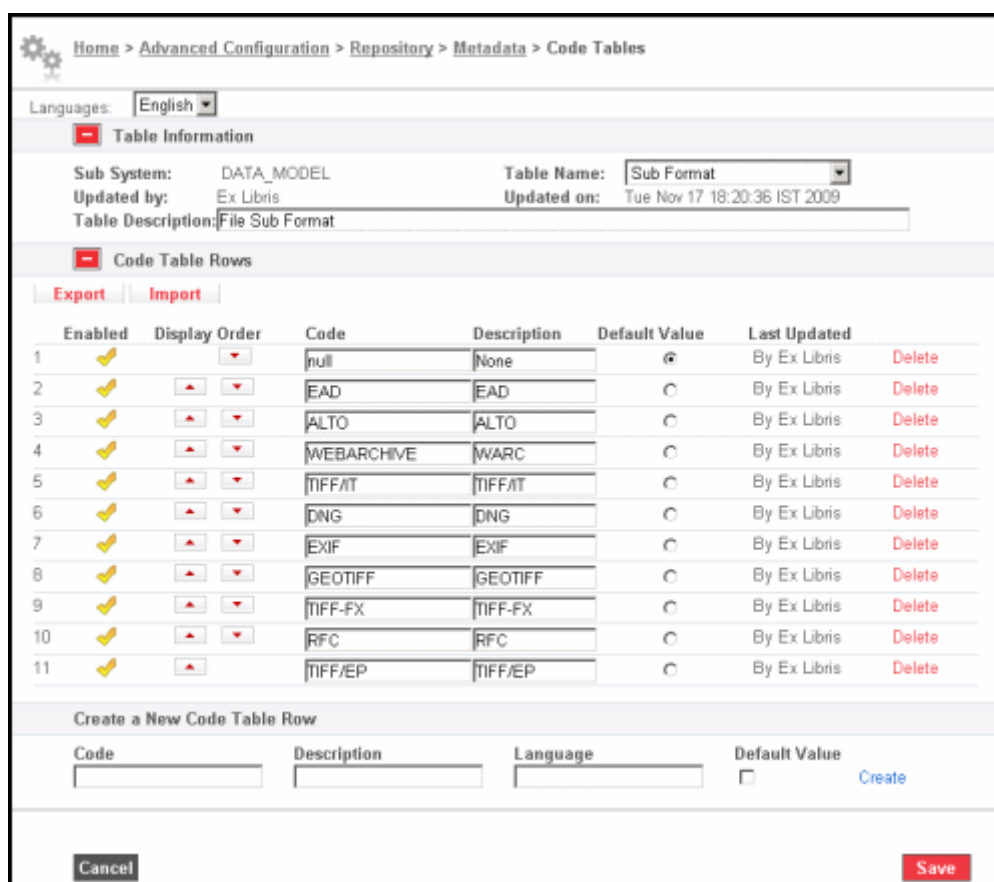


Figure 50: File Subformat Code Table

Administrators work with the File Subformat code table as needed.

## Configuring the OAI Server

oai-provider-config.xml contains configuration details for your OAI server, including values returned through the Identify protocol request and maximum number of objects returned per ListRecords and ListIdentifiers request.

### Repository Information

Users can edit the oai-provider-config.xml configuration file to provide information about the repository as specified in <http://www.openarchives.org/OAI/openarchivesprotocol.html#Identify>, according to the following guidelines:

Table 14. Repository Information

Field	Default	Notes
repositoryName	Rosetta	Can be replaced

Table 14. Repository Information

Field	Default	Notes
baseURL		Should match your Rosetta delivery load balancer hostname and port
protocolVersion	2.0	Should not be changed
earliestDatestamp	2000-01-01T00:00:00Z	Can be edited to reflect a more recent date; format must conform to YYYY-MM-DDThh:mm:ssZ granularity
deletedRecord	persistent	Rosetta currently does not support OAI set deletion, so this should not be changed
granularity	YYYY-MM-DDThh:mm:ssZ	Should not be changed
adminEmail		Can be replaced
ListRecordLimit	1000	Can be replaced; in case of large records timeouts may occur, in which case a lower limit should be applied
ListIdentifiersLimit	2000	Can be replaced; in case of timeouts a lower limit should be applied
scheme	oai	Should not be changed
repositoryIdentifier		Should match your Rosetta delivery load balancer hostname
delimiter	:	Should not be changed
sampleIdentifier		Concatenation of {repositoryIdentifier}:IE1000, e.g. rosetta.myinstitution.org:IE1000

### ***Metadata Formats***

metadataFormat elements should reflect the list of formats as configured in the OAI Metadata format code table. The metadataPrefix element should match the row's code field value.

## Utilities and Files

Administrators can create multiple utilities for processing different types of objects and performing different operations.

This section contains:

- [MIME Types](#) on page 98
- [Stream Handlers \(Deprecated\)](#) on page 98
- [Generic Representation Creation Rules](#) on page 106
- [Thumbnail Creation Rules](#) on page 106

### MIME Types

Administrators define MIME types that must be available to staff when they configure material flows. Administrators can configure MIME types by accessing the MIME Types code table as described in [Working with Code Tables](#) on page 234.

### Stream Handlers (Deprecated)

Stream handlers are part of the Generic Representation task that creates derivative copies. Their table maps the name of the stream handler (such as `tiff_2_jpeg`) to the script that calls the utility/tool for migrating files. Any parameters are also stored in the table.

#### *Creating a Stream Handler*

The Rosetta system comes supplied with a number of predefined stream handlers (such as thumbnail generation and technical metadata extraction). In addition, Administrators can create a new generic representation or thumbnail stream handler.

Administrators configure the components that define task behavior as described in the table below:

Table 15. Task Components

Component	Description	Defined In...
Stream handler utility	A program that performs an operation on an object	Stream Handler mapping table
Script	Code that wraps the stream handler utility and enables launching it with specified parameters	Any external text editor

Table 15. Task Components

Component	Description	Defined In...
Task rule	A rule that defines the stream handler utility to be used for the specific object	One of the following: <ul style="list-style-type: none"> <li>■ Generic representation task rules</li> <li>■ Thumbnail rules</li> </ul>

The process of stream handler creation consists of the following stages:

- 1 Creating a script that runs a stream handler with specified parameters
- 2 Creating an entry for the new stream handler in the Stream Handlers mapping table
- 3 Creating a rule that the Rosetta system uses to determine the stream handler to be used for processing a specific object

**To create a stream handler:**

- 1 Create a script that wraps the stream handler utility and enables launching it with specified parameters.

The following example contains the code of the script that wraps the `pdftotext` utility.

```
#!/bin/sh
for ARG do
    T_ARG="\ "$ARG\ "
    ARGS="$ARGS $ARG"
    T_ARGS="$T_ARGS $T_ARG"
    LAST_ARG="$ARG"
done

eval pdftotext $T_ARGS

exit $?
```

- 2 On the Advanced Configuration page, click **Repository**.  
The Repository page opens.
- 3 Click **Stream Handlers**. The Stream Handlers mapping table opens.

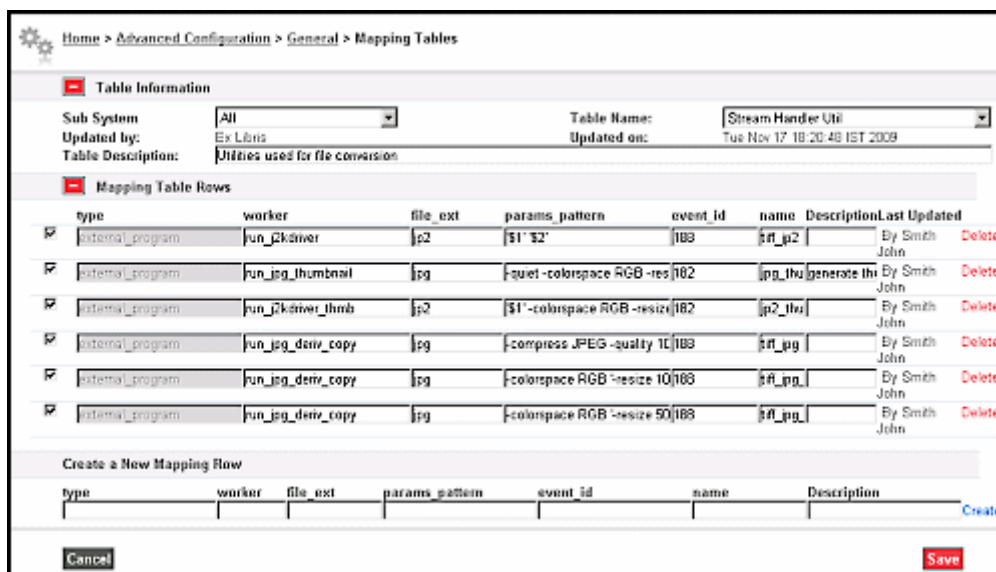


Figure 51: Stream Handlers Mapping Table

- 4 Enter information under the **Create a New Mapping Row** bar at the bottom of the page.
- 5 Click **Save**. The new entry is displayed in the mapping table.
- 6 On the Advanced Configuration page, click **Repository**. The Repository page opens.
- 7 Click **Utilities and Files**. The Utilities and Files page opens.
- 8 Click **Generic Representation Task Rules**. The Generic Representation Task rules page opens.
- 9 Click **Add Rule**. The Task Rule Editor page opens.

Input General Parameters:			
Parameter		Operator	Value
Task Name	*	=	
File Extension	*	=	
Droid Id	*	=	

Output Parameters:		
Parameter	Result	
Stream Handler Util	*	

Figure 52: Task Rule Editor Page

- 10 Complete the fields as required. For detailed information about parameter operators and values, see [Operators Used in Rule Parameters](#) on page 51.
- 11 Click **Save**. The new rule is saved to the Rosetta system.

The task is saved to the Rosetta system. Administrators can now use this task in task chains.

## Transformation Profiles

Transformation profiles are migration plugin-based alternatives to the Stream Handler framework. They can be used to generate derivative copies where one-to-many or many-to-one relations exist between the original file format and the derivative copy format (for example, one multi-page TIF file to several JPGs or several TIF files to one PDF).

To create a Transformation Profile:

- From the Advanced Configuration page, click through the following headings until you reach the Transformation Profiles page: **Repository > Utilities and Files > Transformation Profiles**.

Transformation Profiles List									
Active	Name	Plugin	Parameters	Processing	Clone File MD				
✓	JP2 Thumbnails	JPG-JPGMigrationTool	-colorspace RGB -resize 100x100	THUMBNAIL	<input type="checkbox"/>	Update	Duplicate	Delete	
✓	JPG Thumbnails	JPG-JPGMigrationTool	-quiet -colorspace RGB -resize 100x100	THUMBNAIL	<input type="checkbox"/>	Update	Duplicate	Delete	
✓	TIFF to JP2	TIFF-JP2MigrationTool	-	NONE	<input type="checkbox"/>	Update	Duplicate	Delete	
✓	TIFF to JPG	JPG-JPGMigrationTool	-compress JPEG -quality 10 -colorspace RGB	NONE	<input type="checkbox"/>	Update	Duplicate	Delete	
✓	TIFF to JPG low resolution	JPG-JPGMigrationTool	-colorspace RGB -resize 500x500	NONE	<input type="checkbox"/>	Update	Duplicate	Delete	
✓	TIFF to JPG medium resolution	JPG-JPGMigrationTool	-colorspace RGB -resize 1000x1000	NONE	<input type="checkbox"/>	Update	Duplicate	Delete	
✓	TIFF to PDF Merge	TIFF-PDFMergerMigrationTool	-dBATCH -dNOPAUSE -dNOCUTTERSAVE -dUseCIEColor -sProcessColorModel=Device... -sDEVICE=pdfwrite	MERGE	<input type="checkbox"/>	Update	Duplicate	Delete	
✓	TIFF to PDF Merge (ImageMagick)	TIFF-PDFMerger-ImageMagick-MigrationTool	-	MERGE	<input type="checkbox"/>	Update	Duplicate	Delete	
✓	Video to HLS Streaming	Video-HLSMigrationTool	-b:v:0 6000k -b:v:1 2000k -b:a:0 64k -b:a:1 32k -map 0:v -map 0:a -map 0:v -map 0:a -var_stream_map 'v:0,a:0 v:1,a:1' -hls_list_size 0	NONE	<input type="checkbox"/>	Update	Duplicate	Delete	

Figure 53: List of Transformation Profiles

- Click the **Create Transformation Profile** button. The Transformation Profile Details page opens.

Figure 54: Transformation Profile Details Page

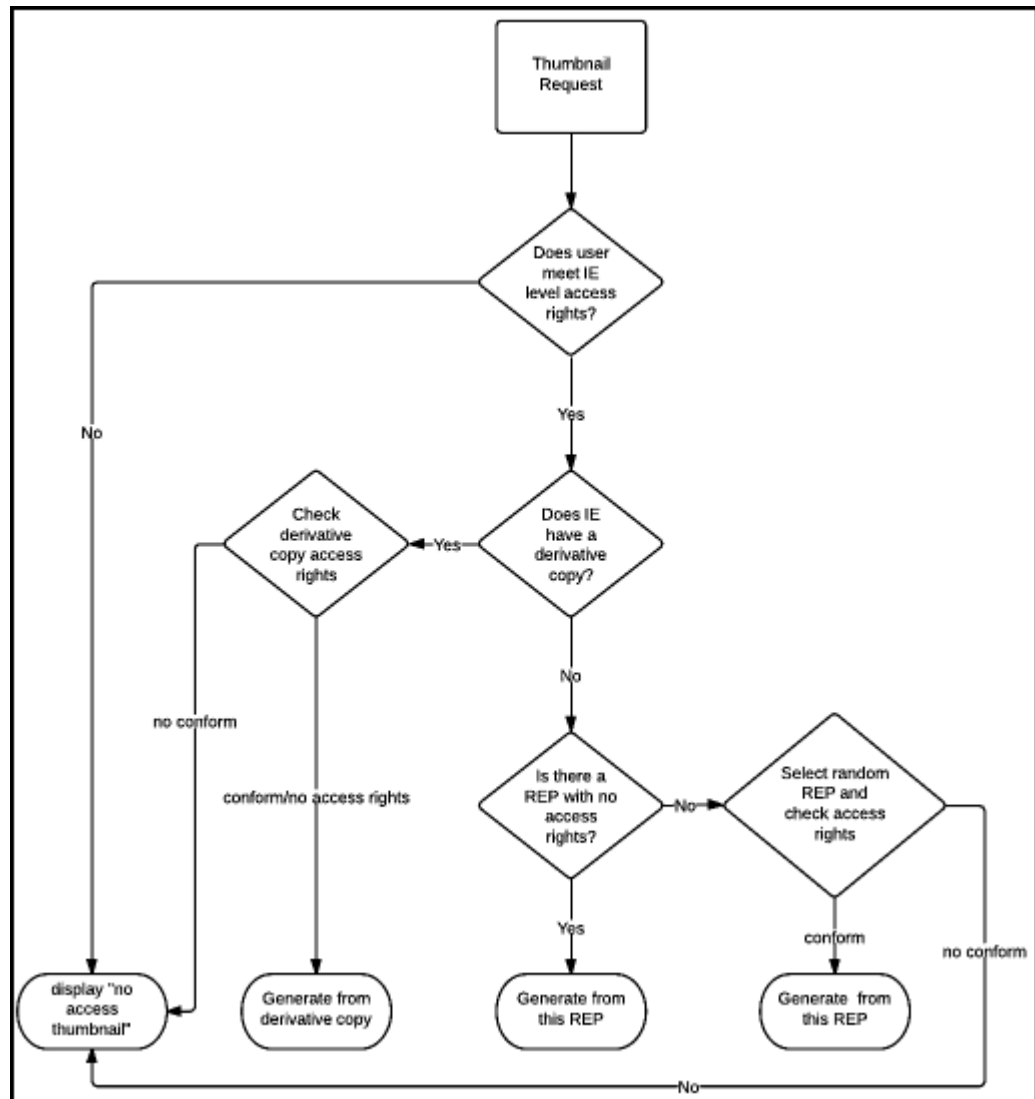
The following table describes the fields available on the Transformation Profile Details page.

Table 16. Fields on the Transformation Profile Details Page

Parameter	Type	Description	Notes
Name	Text	Name of profile	
Plug-in	Combo/drop-down	A list of installed migration plug-ins	
Parameters	Text	Arguments to pass to the plug-in	

Table 16. Fields on the Transformation Profile Details Page

Parameter	Type	Description	Notes
Processing	Combo/drop-down	Instructions to Rosetta on how to process the files.	<ul style="list-style-type: none"> <li>■ None - Each original file will be transferred into one derivative copy file</li> <li>■ Merge - All files in the selected Representation will be merged into one derivative copy file</li> <li>■ Split: A multiple-file derivative copy Representation will be created from the single-file original Representation</li> <li>■ Thumbnail: specifies this profile will be used for generating thumbnails and not derivative copies</li> </ul>
Clone File MD	Checkbox	Copy file-level descriptive/source metadata from the original	



**NOTES:**

- The responsibility for the actual splitting/merging of the files is the plug-ins.
- If no files match the profile configuration, no representation is created.

A transformation profile can be used in a create derivative copy task. See the following figure for an example.

The screenshot shows a web-based configuration interface for a task. The breadcrumb path is: > Data Management > Manage Sets and Processes > Manage Processes > Complete Parameters. The 'General Info' section contains a 'Process Name' field with the value 'Process for set: SIP 333 logical set1437804 Process 140341937'. The 'Parameters' section is titled 'Create Derivative Copy Representation - Create Derivative Copy Representation'. It includes several fields: 'Preservation Type' (dropdown: Preservation Master), 'Representation Entity Type (Input)' (dropdown: None), 'File Extension Filter' (a table with 0 items selected, 'Remove all', and 'Add all' buttons, listing 3dm, 3ds, and CIF with plus signs), 'Copy other extensions' (checkbox: unchecked), 'Plug-in Type' (radio buttons for Transformation and Stream Handler, with 'Transformation' selected), 'Profile' (dropdown: tiff\_2\_pdf), 'Representation Code' (dropdown: Medium), 'Access Rights Policy' (dropdown: Embargoed until 2017), and 'Representation Entity Type (Output)' (dropdown: None). At the bottom are 'Cancel' and 'Save' buttons.

Figure 55: Task Parameters for Transformation Profile

## Generic Representation Creation Rules

Generic representation creation rules are used by the system to define which stream handler to use based on the original file format/extension and the task name.

The task name is configured as part of the Create Derivative Copy task chain.

For more information about configuring the task chain, see [Managing Processes](#) on page 85.

For information about creating a stream handler as part of a generic representation task, see [Stream Handlers \(Deprecated\)](#) on page 98

## Thumbnail Creation Rules

Rosetta automatically creates a thumbnail for each file when it's delivered. In order to create the correct thumbnail for each file format, the system uses these rules to match between the file format and the appropriate utility that should be used to create the thumbnail.

(For information on creating format-utility matching tools, see [Stream Handlers \(Deprecated\)](#) on page 98.)

Rosetta generates thumbnails from a given representation (REP) using the following algorithm:

- 1 Derivative copy
- 2 REP with no access rights
- 3 Any other REP

If access rights are not met for the selected REP, a "no access" thumbnail is displayed.

---

**NOTE:**

Administrators can disable access rights checking for thumbnails by setting the `check_thumbnail_access_rights` general parameter to false. See [Rosetta System Administration Guide, General Parameters - Delivery](#).

---

If there is no thumbnail creation rule for the selected REP's files, a generic thumbnail is displayed (see [Generic Thumbnail Creation](#) on page 111).

The following flowchart demonstrates the process of thumbnail request to thumbnail generation.

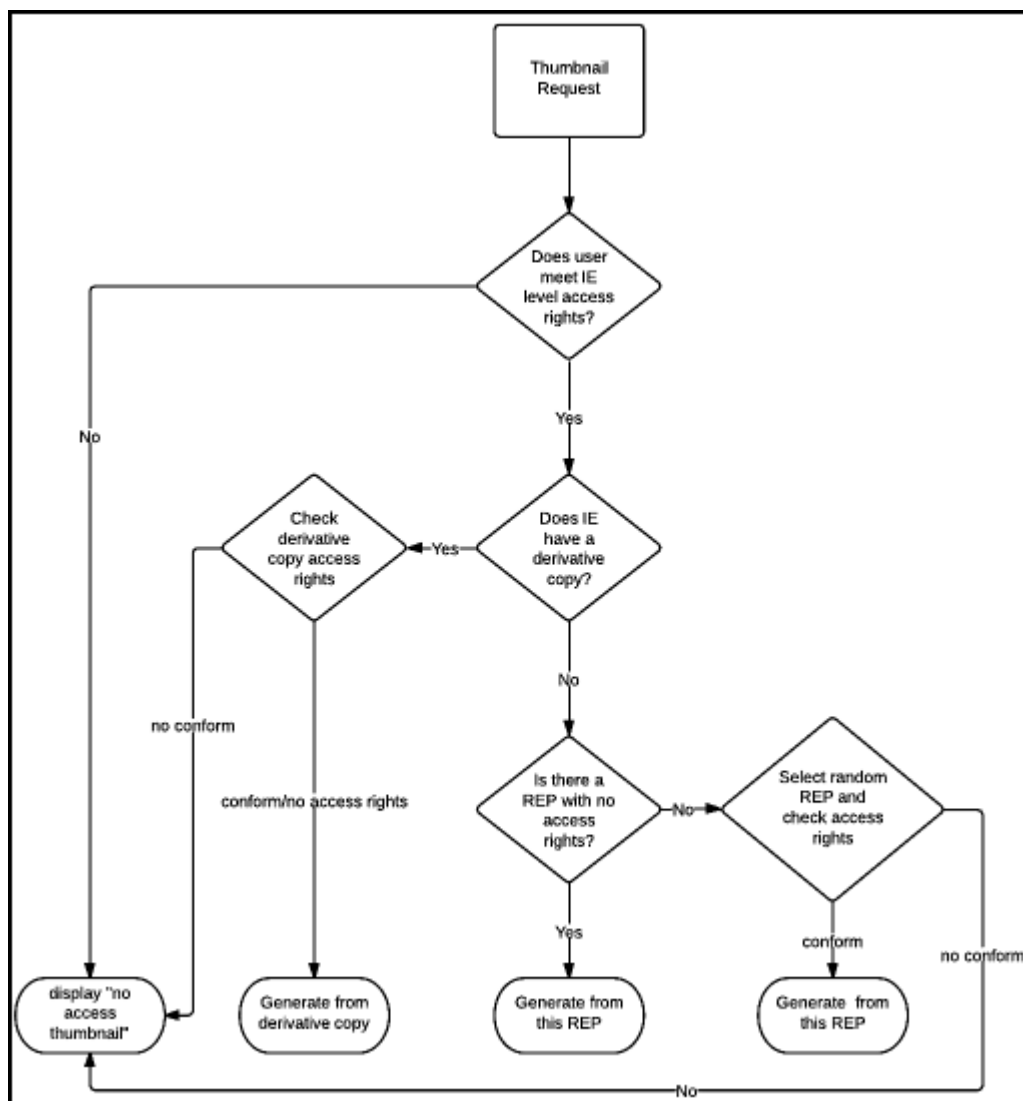


Figure 56: Thumbnail Creation Flow

The order of an IE's thumbnails will be according to the (first) logical structmap. If no logical structmap exists, order will be determined by the physical structmap.

By default, up to five thumbnails can be generated for an IE. This can be increased by the `ie_thumbnail_limit` general parameter (see Rosetta System Administration Guide, General Parameters - Delivery). The thumbnail view in user interfaces and viewers indicates the actual number of files per IE.

The recommendation remains to create thumbnails as part of the enrichment process or ongoing maintenance task chain to improve user experience for modules that display thumbnails."

## General Settings for Repositories

This section contains:

- [Configuring Events](#) on page 109
- [Configuring Provenance](#) on page 110
- [Configuring IP Restrictions](#) on page 110
- [Generic Thumbnail Creation](#) on page 111

### Configuring Events

Administrators can determine which events the Rosetta system must use for audit and statistical purposes. Administrators work with events during advanced configuration, using the Event Configuration mapping table. (For more information about accessing the Event Configuration mapping table, see [Administration](#) on page 17.)

Audit Indicator	Statistic Indicator	Contact Person (n/a)	Alert (n/a)	Internal Name	EventTypeDescription	Last Updated
<input checked="" type="checkbox"/>	N	N	N	E_HAS_BEEN_E	075	By Ex Libris
<input checked="" type="checkbox"/>	Y	Y	N	E_HAS_BEEN_S	076	By Ex Libris
<input checked="" type="checkbox"/>	Y	Y	N	E_HAS_BEEN_M	077	By Ex Libris
<input checked="" type="checkbox"/>	Y	Y	N	PROCESSING_AI	000	By Ex Libris
<input checked="" type="checkbox"/>	Y	Y	N	ADD_REPRESENT	001	By Ex Libris
<input checked="" type="checkbox"/>	Y	Y	N	ADD_REPRESENT	002	By Ex Libris
<input checked="" type="checkbox"/>	Y	Y	N	ADD_REPRESENT	003	By Ex Libris
<input checked="" type="checkbox"/>	Y	Y	N	BYTE_STREAM_E	B10	By Ex Libris
<input checked="" type="checkbox"/>	Y	Y	N	BYTE_STREAM_E	B11	By Ex Libris
<input checked="" type="checkbox"/>	Y	Y	N	BYTE_STREAM_E	B12	By Ex Libris
<input checked="" type="checkbox"/>	Y	Y	N	BYTE_STREAM_E	B13	By Ex Libris
<input checked="" type="checkbox"/>	Y	Y	N	BYTE_STREAM_E	B14	By Ex Libris
<input checked="" type="checkbox"/>	Y	Y	N	BYTE_STREAM_E	B15	By Ex Libris
<input checked="" type="checkbox"/>	Y	Y	N	BYTE_STREAM_E	B16	By Ex Libris
<input checked="" type="checkbox"/>	Y	Y	N	BIT_STREAM_MD	B17	By Ex Libris
<input checked="" type="checkbox"/>	Y	Y	N	BIT_STREAM_MD	B18	By Ex Libris

Figure 57: Event Configuration Mapping Table

Administrators work with the Event Configuration mapping table as described in [Working with Mapping Tables](#) on page 238.

For a list of Events in Rosetta, see [Appendix C: Events](#) on page 255.

## Configuring Provenance

Administrators can determine which events the system must store for digital preservation purposes. Administrators define this information during advanced configuration, using the Provenance Configuration mapping table. (For more information on accessing the Provenance Configuration mapping table, see [Administration](#) on page 17.)

EventType	Provenance Indicator	Description	Last Updated
<input checked="" type="checkbox"/>	21		By Ex Libris
<input checked="" type="checkbox"/>	24		By Ex Libris
<input checked="" type="checkbox"/>	25		By Ex Libris
<input checked="" type="checkbox"/>	27		By Ex Libris
<input checked="" type="checkbox"/>	31		By Ex Libris
<input checked="" type="checkbox"/>	32		By Ex Libris
<input checked="" type="checkbox"/>	38		By Ex Libris
<input checked="" type="checkbox"/>	40		By Ex Libris
<input checked="" type="checkbox"/>	43		By Ex Libris
<input checked="" type="checkbox"/>	44		By Ex Libris
<input checked="" type="checkbox"/>	52		By Ex Libris
<input checked="" type="checkbox"/>	55		By Ex Libris
<input checked="" type="checkbox"/>	120		By Ex Libris
<input checked="" type="checkbox"/>	124		By Ex Libris
<input checked="" type="checkbox"/>	125		By Ex Libris

Figure 58: Provenance Configuration Mapping Table

Administrators work with the Provenance Configuration mapping table as described in [Working with Mapping Tables](#) on page 238.

## Configuring IP Restrictions

Administrators can restrict access to certain areas in the Rosetta system to users who log in to the Rosetta system from specific IP addresses. Administrators configure these IP addresses during advanced configuration using the IP Webservice Restriction mapping table. (For more information on accessing the IP Webservice Restriction mapping table, see [Administration](#) on page 17.)

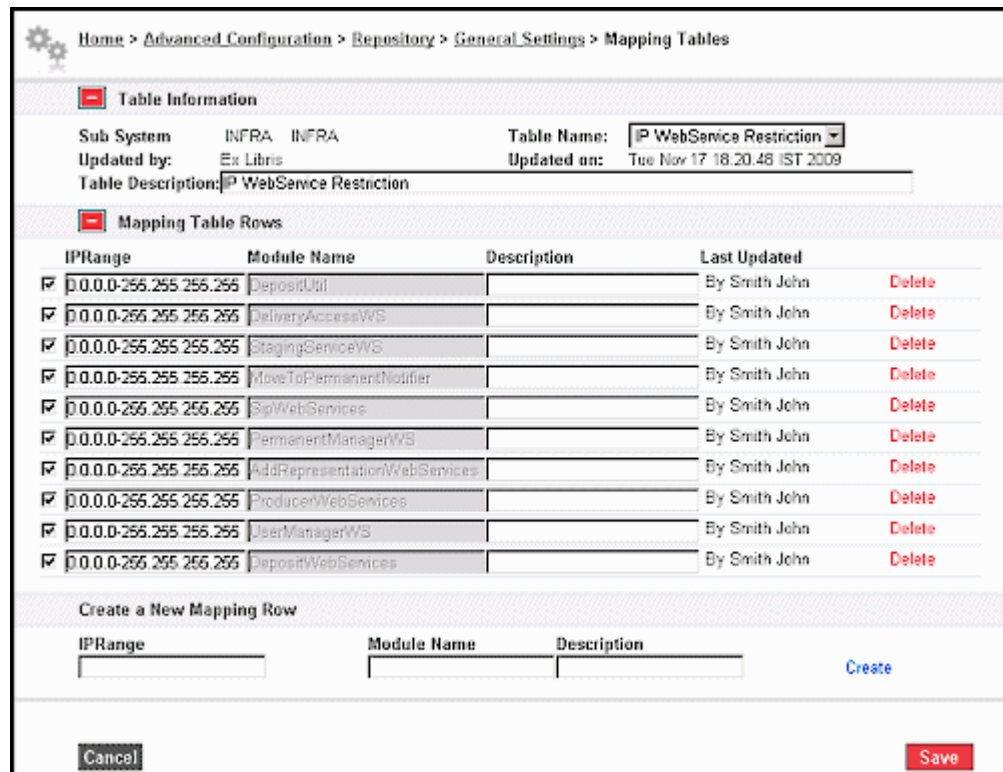


Figure 59: IP WebService Restriction Mapping Table

Administrators can work with the IP WebService Restriction mapping table as described in [Working with Mapping Tables](#) on page 238.

## Generic Thumbnail Creation

Rosetta uses an algorithm to generate thumbnails. When the system cannot generate the thumbnail using the algorithm, a default image is displayed.

Two types of configuration exist for thumbnail creation and display:

- [Configuring the Default Thumbnail Rule List](#) on page 111
- [Selecting the Default Thumbnail Image](#) on page 114

### *Configuring the Default Thumbnail Rule List*

To configure the list of rules for thumbnail creation, follow the path from the Advanced Configuration page to **Repository > General Settings > Generic Thumbnail Creation Rules**.

Home > Advanced Configuration > Repository > General Settings > Rule List

Filter: All Find: in All Go

Add Rule 1 - 10 of 30 Records 1 2 3 >>

Enabled	Order	Name	Description	Created	Modification Date	
<input checked="" type="checkbox"/>	1	ASF Generic Thumbnail Rule	Default thumbnail for ASF files	18/11/2009 08:12:00	18/11/2009 08:12:00	<a href="#">Update</a> <a href="#">Duplicate</a> <a href="#">Delete</a>
<input checked="" type="checkbox"/>	2	AUDIO Generic Thumbnail Rule	Default thumbnail for AUDIO files	18/11/2009 08:12:00	18/11/2009 08:12:00	<a href="#">Update</a> <a href="#">Duplicate</a> <a href="#">Delete</a>
<input checked="" type="checkbox"/>	3	AVI Generic Thumbnail Rule	Default thumbnail for AVI files	18/11/2009 08:12:01	18/11/2009 08:12:01	<a href="#">Update</a> <a href="#">Duplicate</a> <a href="#">Delete</a>
<input checked="" type="checkbox"/>	4	BMP Generic Thumbnail Rule	Default thumbnail for BMP files	18/11/2009 08:12:01	18/11/2009 08:12:01	<a href="#">Update</a> <a href="#">Duplicate</a> <a href="#">Delete</a>
<input checked="" type="checkbox"/>	5	DJV Generic Thumbnail Rule	Default thumbnail for DJV files	18/11/2009 08:12:01	18/11/2009 08:12:01	<a href="#">Update</a> <a href="#">Duplicate</a> <a href="#">Delete</a>
<input checked="" type="checkbox"/>	6	DOC Generic Thumbnail Rule	Default thumbnail for DOC files	18/11/2009 08:12:01	18/11/2009 08:12:01	<a href="#">Update</a> <a href="#">Duplicate</a> <a href="#">Delete</a>
<input checked="" type="checkbox"/>	7	EAD Generic Thumbnail Rule	Default thumbnail for EAD files	18/11/2009 08:12:01	18/11/2009 08:12:01	<a href="#">Update</a> <a href="#">Duplicate</a> <a href="#">Delete</a>
<input checked="" type="checkbox"/>	8	IMG Generic Thumbnail Rule	Default thumbnail for IMG files	18/11/2009 08:12:02	18/11/2009 08:12:02	<a href="#">Update</a> <a href="#">Duplicate</a> <a href="#">Delete</a>
<input checked="" type="checkbox"/>	9	JP2 Generic Thumbnail Rule	Default thumbnail for JP2 files	18/11/2009 08:12:02	18/11/2009 08:12:02	<a href="#">Update</a> <a href="#">Duplicate</a> <a href="#">Delete</a>
<input checked="" type="checkbox"/>	10	JPG Generic Thumbnail Rule	Default thumbnail for JPG files	18/11/2009 08:12:02	18/11/2009 08:12:02	<a href="#">Update</a> <a href="#">Duplicate</a> <a href="#">Delete</a>

< back

Figure 60: Thumbnail Creation Rules

The rules for all configured thumbnails appear in a table.

Use the up and down arrow buttons to move a rule to a different priority level. The last rule in the list should be a default rule in case no other rules apply.

### *Editing a Thumbnail Creation Rule*

To edit a thumbnail creation rule, click the **Update** link corresponding to the rule you want to edit. The Rule Details page opens:

Home > Advanced Configuration > Repository > General Settings > Rule Details

**Rule Editor**

Name: DOC Generic Thumbnail Rule  
Description: Default thumbnail for DOC files

Created By: System      Created on: 17/11/2009 18:33:00  
Updated By: Ex Libris      Last Update on: 17/11/2009 18:33:00

**Input Dynamic Parameters:**

Dnx Section	Dnx Section Key	Operator	Value	
generalFileCharacteristics	fileExtension	=	DOC	delete
producer	producerId	InList	112	delete
webHarvesting	primarySeedURL	contains	4454	delete

webHarvesting Find Keys -> primarySeedURL InList Add Dnx

**Output Parameters:**

Parameter	Result
Generic Thumbnail	DOC (Default thumbnail 1)

Cancel Save

Figure 61: Rule Editor for Generic Thumbnail Rules

You can edit the Name and Description of the rule (top section of the page) You can also edit the output result (using the drop-down at the bottom right of the page, then clicking the **Save** button). You can edit the parameters by adding new ones and/or deleting existing ones.

Rules consist of a metadata parameter, referred to as a DNX, an operator such as equals to, and a value. For details about operators and values, see [Operators Used in Rule Parameters](#) on page 51.

A rule such as `fileExtension = jpg` tells the system to display the selected default thumbnail image (from the **Result** drop-down field) when the file has the extension `.jpg` and Rosetta is unable to create a specific thumbnail based on the existing thumbnail-creation algorithm.

### *Adding a Thumbnail Creation Rule*

To add a rule:

- 1 From the **Dnx Section** column, select a DNX section from the drop-down menu and click **Find Keys**.  
The page reloads with relevant key entries in the following field.
- 2 From the **DNX Section Key** column, select a key from the drop-down menu.

- 3 Select an operator to compare the key with the value you will enter. For details about operators and values, see [Operators Used in Rule Parameters](#) on page 51.
- 4 Enter a value to complete the parameter.
- 5 Click the **Add DNX** button.

Rosetta adds the rule to the system. When a file matching that parameter cannot obtain a thumbnail image, Rosetta uses this rule to create a default thumbnail.

**NOTE:**

To change the image displayed when the rules apply, select a different result from the **Result** drop-down list and click **Save**.

### Selecting the Default Thumbnail Image

To configure the default image displayed when no thumbnail is available, follow the path from **Advanced Configuration > Repository > General Settings > List of Generic Thumbnails**. The Generic Thumbnail List page opens.

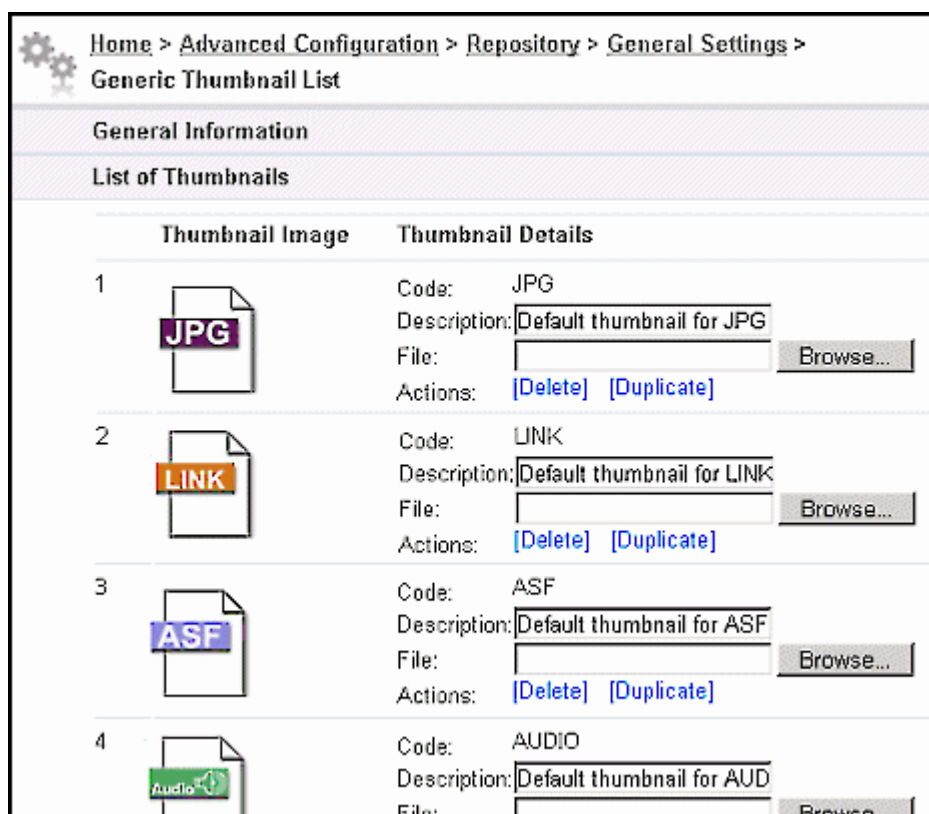


Figure 62: Generic Thumbnail List

### To create a new default thumbnail image:

- 1 Scroll to the bottom of the page.
- 2 Under the **Load a new Generic Thumbnail** bar, enter a code and a description for the new thumbnail.
- 3 Click the **Browse** button and select an image from a local or network drive.
- 4 Click the **Load** button.

Rosetta loads the thumbnail image and details and displays them as an entry on the Generic Thumbnail List page.

## Configuring Sequences

You can configure sequences to create strings consecutive numbers. Sequences can be used to create persistent identifiers.

### To create a sequence:

- 1 Open the sequences page (**Repository > Utilities and Files > Sequences**). The following appears:

	Active	Name	Description	Owner	Creation Date	Modification Date		
1	✓	CRS SEQh3M	-	CRS00	10/02/2018	10/02/2018	Update	Delete
2	✓	INS00 SEQV0r	-	CRS00.INS00	10/02/2018	10/02/2018	Update	Delete

Figure 63: List of Sequences

- 2 Click Add Sequence. The following appears:

Figure 64: Sequences - Details

3 Fill in the fields of the table as described in the following table:

Table 17. Configuring Sequences

Field	Description
Name	The name of the sequence.
Owner	The institution that you want to have access to the sequence. Select All to have the sequence available to every institution in the consortium.
Description	A description of the sequence.
Start	The number with which you want the sequence to start.
End	The number with which you want the sequence to end.
Prefix	The prefix of the sequence, if desired.
Fixed Length	The number of digits in the sequence. Leading zeros are added to adjust the sequence to the desired length.

4 Click **Save**. The sequence is added to the list of sequences.

## Configuring Persistent Identifiers

### About Persistent Identifiers

A persistent identifier (PID) is a unique identifier for a digital object such as an image or an article. PIDs enable accessing this object as long as the object exists, even if it was moved to another location. PIDs work with Rosetta and the Handle System to enable persistent identification of an object across contexts.

### Persistent Identifiers and the Handle System

The concept of handles is similar to the International Standard Book Number (ISBN). ISBN enables assigning a unique identifier to an edition of a book. This identifier is used internationally to obtain information about the book (such as author, publisher, and country) in a standard manner.

Like ISBN, a PID contains a unique object name, also known as a handle. Because an international unified mechanism for assigning handles to digital objects is provided, external systems can use handles to get information about the object, including its location.

However, handles on their own do not contain any reference to the current object location. Otherwise, handles could not be used when the location is changed. Instead, information about the object's location is stored separately. A handle is associated with the corresponding location using a set of services provided by the Corporation for National Research Initiatives (CNRI) and known as the Handle System.

The Handle System consists of an open protocol, a namespace, and a reference implementation of this protocol. The protocol enables a distributed computer system to store handles of digital objects and resolve these handles into information required for locating and accessing these objects. When an object is moved, only an appropriate record in the Handle System must be modified. This approach enables keeping the object name persistent while the object's location and other related information can be modified over time.

A handle is an example of a uniform resource name (URN) that serves as a persistent, location-independent resource identifier. URNs are designed to facilitate mapping other namespaces which share the properties of URNs to the URN namespace.

### Configuring Persistent Identifiers – Workflow

This section describes the workflow for adding persistent identifiers to objects in Rosetta. The following are the steps of the workflow:

- 1 Configure a sequence that will be used to add persistent identifiers to objects in Rosetta.
- 2 Configure a task chain with the Handle PI Generator task. There are tasks for the IE, representation, and file levels.
- 3 Create a set of objects to which you want to add the persistent identifiers.
- 4 Configure and run a process that will run the task chain that adds persistent identifiers to the set of objects.
- 5 Publish the objects with the persistent identifiers.

## Configure a Sequence

For information on configuring sequences, see [Configuring Sequences](#) on page 115.

## Configure a Task Chain

You must configure a task chain that will be used by a process to add PI's to a set.

To configure a task chain:

- 1 From the Administration area, click **Repository > Task Chains > Add Task Chain**. The following appears:

Repository / Task Chains / Details

Task Chain ID: Created By: Created On: 12/02/2018 17:23:37  
Updated By: Updated On:

### General Information

\* Name

\* Description

\* Status: Active  Status Date: 12/02/2018

\* Task Chain Level: IE

\* Groups:

- Preservation
- Maintenance
- Validation Stack - Use file level tasks only
- Workbench
- Webeditor - Staging
- Enrichment
- Move To Permanent
- Metadata Validation
- Webeditor - Permanent

Task List Task Parameters

Add Task

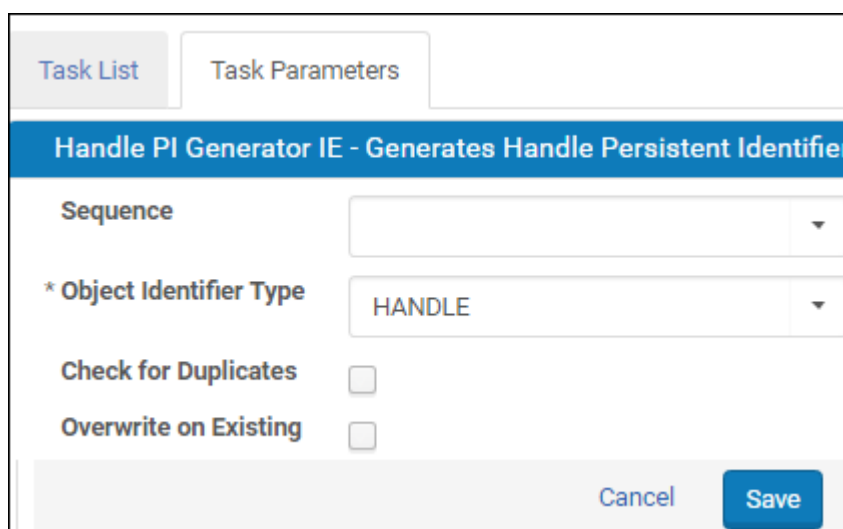
Order	Name	Description	Level	Next Step On Failure
-------	------	-------------	-------	----------------------

Cancel Save

Figure 65: Add Task Chain

- 2 Enter a name and description for the task chain.

- 3 Select a status.
- 4 Select a task chain level – IE, Representation, or File.
- 5 Select the groups to which you want the task chain to belong.
- 6 Click **Add Task** and select the Handle PI Generator IE/Rep/File task depending on the level of the task chain.
- 7 Click the task parameters tab. The following appears:



The screenshot shows a dialog box titled "Task Parameters" for the "Handle PI Generator IE - Generates Handle Persistent Identifier" task. The dialog has two tabs: "Task List" and "Task Parameters". The "Task Parameters" tab is selected. The dialog contains the following fields and controls:

- Sequence:** A dropdown menu.
- \* Object Identifier Type:** A dropdown menu with "HANDLE" selected.
- Check for Duplicates:** An unchecked checkbox.
- Overwrite on Existing:** An unchecked checkbox.
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

Figure 66: Task Parameters

- 8 You can enter information in the fields that will appear as the default when creating a process. For more information about these fields, see [Configure and Run a Process](#) on page 120.
- 9 Click **Save**.

The task chain is configured and available to be added to a process.

## Create a Set

You must create a set of objects to which you want to add the persistent identifiers. For information on creating a set, see the **Working with Sets** section of the *Rosetta Staff User's Guide*.

## Configure and Run a Process

You must configure a process that will run the task chain that adds persistent identifiers to the set of objects that you created.

To configure a process:

- 1 From the List of Processes page (**Data Management > Manage Sets and Processes > Processes**), click **Add Process**. The list of task chain appears.
- 2 Select the task chain that you configured to add persistent identifiers to a set and click **Next**. The following appears:

Deposits ▾ Submissions ▾ Data Management ▾ Preservation ▾

🏠 / Data Management: Processes / Details 1 2 3 4 5

### General Info

\* Process Name

Priority

### Handle PI Generator IE - Generates Handle Persistent Identifier

Sequence

\* Object Identifier Type

Check for Duplicates

Overwrite on Existing

### Email Notification

Send email?

\* Email

Back Cancel Next

Figure 67: Add Process - Details

- 3 Enter a name for the process.
- 4 From the **Priority** drop-down list, select a priority.
- 5 Select a sequence that you configured.
- 6 Select an object identifier type.
- 7 If you want Rosetta to skip identifiers that already exist, select **Check for Duplicates**. Rosetta will skip up to three consecutive duplicates. If you do not select this checkbox, Rosetta adds duplicate identifiers.
- 8 If you want Rosetta to overwrite existing duplicates, select **Overwrite on Existing**.
- 9 In the **Send Email?** drop-down list, select **Yes** or **On failure only** if you want to be notified concerning the progress of the process and enter an email address in the **Email** field.

- 10 Click **Next**.
- 11 Select a set from the list of sets, and click **Next**.
- 12 Schedule the process to run if you want, and click **Next**.
- 13 Review the details of the process, and click **Submit**.

The process runs.

## Publish to a Handle Server

After the persistent identifiers have been added to the objects in Rosetta you can publish them, so that they can be used by a Handle server. Configure a publishing configuration for a Handle server by setting the Target Type to the HandlePublisherPlugin. For more information on publishing, refer to the **Configuring Publishing** section of the *Rosetta Staff User's Guide*.

## Configuring Persistent Identifiers (Deprecated)

This section contains:

- **About Persistent Identifiers** on page 122
- **Configuring Creation and Publishing Profiles** on page 124
- **Configuring Creation Rules** on page 128
- **Configuring Publishing Rules** on page 132

### About Persistent Identifiers

A persistent identifier (PID) is a unique identifier for a digital object such as an image or an article. PIDs enable accessing this object as long as the object exists, even if it was moved to another location.

PIDs work with Rosetta and the Handle System to enable persistent identification of an object across contexts. Detailed information on this process is discussed in the following subsections of this section:

- **Persistent Identifiers and the Handle System** on page 123
- **Rosetta and the Handle System** on page 123

Administrators can define rules for creating and publishing PIDs using the Persistent Identifier Creation and Publishing Profiles page. To access this page, follow the path from the Advanced Configuration page: **Repository > Persistent Identifiers > Persistent Identifier Creation and Publishing Profiles**.

Table Name	Sub System	Description	Updated By
1 Handle PI Creation	PI	Handle PI Creation	By Ex Libris <a href="#">Edit</a>
2 Handle PI Publishing - Public/Private Key	PI	Handle PI Publishing - Public/Private Key	By Ex Libris <a href="#">Edit</a>
3 Handle PI Publishing - Secret Key	PI	Handle PI Publishing - Secret Key	By Ex Libris <a href="#">Edit</a>

Figure 68: Persistent Identifier Creation and Publishing Profiles Page

### *Persistent Identifiers and the Handle System*

The concept of handles is similar to the International Standard Book Number (ISBN). ISBN enables assigning a unique identifier to an edition of a book. This identifier is used internationally to obtain information about the book (such as author, publisher, and country) in a standard manner.

Like ISBN, a PID contains a unique object name, also known as a handle. Because an international unified mechanism for assigning handles to digital objects is provided, external systems can use handles to get information about the object, including its location.

However, handles on their own do not contain any reference to the current object location. Otherwise, handles could not be used when the location is changed. Instead, information about the object's location is stored separately. A handle is associated with the corresponding location using a set of services provided by the Corporation for National Research Initiatives (CNRI) and known as the Handle System.

The Handle System consists of an open protocol, a namespace, and a reference implementation of this protocol. The protocol enables a distributed computer system to store handles of digital objects and resolve these handles into information required for locating and accessing these objects. When an object is moved, only an appropriate record in the Handle System must be modified. This approach enables keeping the object name persistent while the object's location and other related information can be modified over time.

A handle is an example of a uniform resource name (URN) that serves as a persistent, location-independent resource identifier. URNs are designed to facilitate mapping other namespaces which share the properties of URNs to the URN namespace.

### *Rosetta and the Handle System*

To enable Rosetta system users to work with PIDs, the Rosetta system provides integration with the Handle System. The following diagram shows how PIDs are created and published:

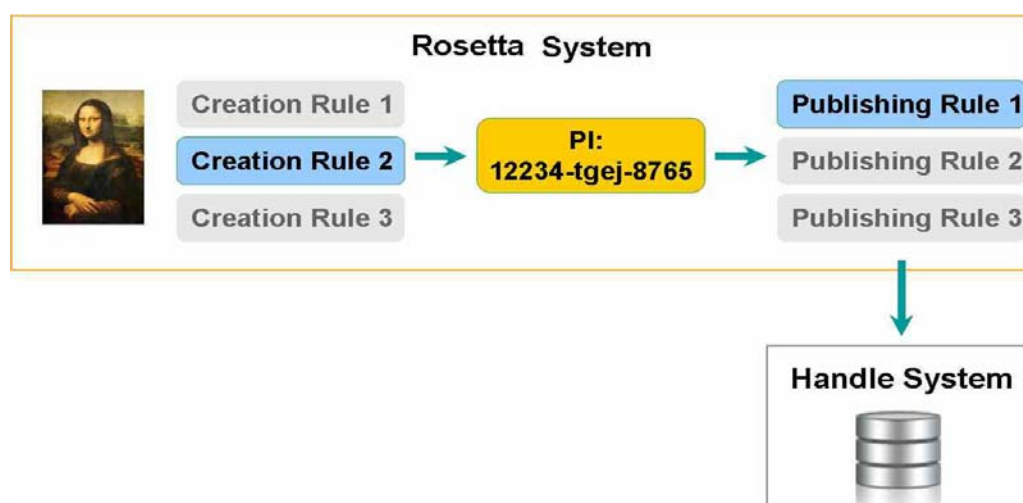


Figure 69: Creating and Publishing PIDs

The flow consists of the following steps:

- 1 To create a PID, the Rosetta system compares input parameters defined in creation rules with the parameters of a content object.
- 2 When the Rosetta system finds a creation rule that matches the object parameters, the system creates a PID using a creation profile defined in the rule.
- 3 To publish the PID to the Handle System, the Rosetta system compares input parameters defined in publishing rules with the parameters of a content object.
- 4 When the Rosetta system finds a publishing rule that matches the object parameters, the system publishes the PID using a publishing profile defined in the rule.

To enable the Rosetta system to create and publish PIDs to the Handle System, an Administrator configures the following components:

- Creation and publishing profiles (see [Configuring Creation and Publishing Profiles](#) on page 124)
- Creation rules (see [Configuring Creation Rules](#) on page 128)
- Publishing rules (see [Configuring Publishing Rules](#) on page 132)

## Configuring Creation and Publishing Profiles

Creation and publishing profiles contain parameters that the Rosetta system must use when creating and publishing PIDs. For example, in a creation profile, Administrators can define a prefix, base URL, and Java class to be used for generating an identifier. Similarly, in a publishing profile, Administrators can

define a host name and authentication information that must be used for communicating with a Handle System server.

Administrators can create multiple profiles for different types of content objects. The Rosetta system determines a profile to be used for a specific object using creation and publishing rules. When the Rosetta system does not find an appropriate rule, the system does not generate a PID. (For more information, see [Configuring Creation Rules](#) on page 128 and [Configuring Publishing Rules](#) on page 132.)

Administrators can configure creation and publishing profiles using mapping tables. In addition, Administrators can configure different publishing profiles for authorization performed with a private/public key and a secret key.

#### To configure a creation or publishing profile:

- 1 On the Initial Configuration page, click **Repository Setup Definitions**. The Repository Setup Definitions page opens.
- 2 Click **Step 7: Persistent Identifiers**. The Persistent Identifiers page opens.
- 3 Click **Persistent Identifier Creation and Publishing Profiles**. The list of mapping tables that define these profiles is displayed.
- 4 Locate the mapping table that defines the profile with which you want to work and click **Edit**. The page containing entries of the selected mapping table is displayed.

The fields in the mapping table can vary depending on the profile you are creating. For more information about the fields displayed for each profile type, see the following sections:

- [Creation Profile](#) on page 125
  - [Publishing Profile Using a Public/Private Key](#) on page 126
  - [Publishing Profile Using a Secret Key](#) on page 127
- 5 Modify the fields that you want to update, and click **Save**.

The Rosetta system now uses the creation profile as defined in the creation rules. (For more information on working with mapping tables, see [Working with Mapping Tables](#) on page 238.)

### *Creation Profile*

When configuring a profile for creating a PID, Administrators define the following fields:

- pi\_type
- pi\_prefix
- pi\_generator\_class

■ base\_url

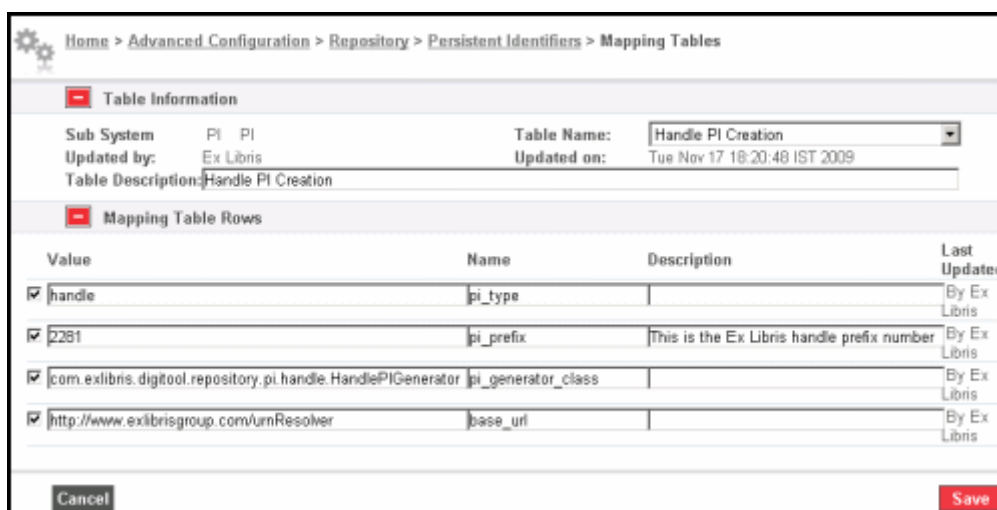


Figure 70: Persistent Identifier Creation Profile

**Publishing Profile Using a Public/Private Key**

When configuring a profile for publishing a PID using a public/private key, Administrators define the fields as described in the following table:

Table 18. Private/Public Key Parameters

Parameter	Defines...
authentication.type	The authorization type
authentication.public.handleName	The name of a handle on the server that contains authentication information
authentication.public.index	Index that defines where authentication information is stored in the handle
authentication.public.privateKeyFile	Location of the private key
authentication.public.passphrase	Password, if necessary

Home > Advanced Configuration > Repository > Persistent Identifiers > Mapping Tables

**Table Information**

Sub System: Persistent Identifiers Table Name: Handle PI Publishing - Public/Private Key  
 Updated by: Ex Libris Updated on: Tue Nov 17 18:20:48 IST 2009  
 Table Description: Handle PI Publishing - Public/Private Key

**Mapping Table Rows**

Value	Name	Description	Last Updated
<input checked="" type="checkbox"/> handle	pi_type		By Ex Libris
<input checked="" type="checkbox"/> com.exlibris.digitool.rep	pi_publisher_class		By Ex Libris
<input checked="" type="checkbox"/> http://localhost:1801/de	url		By Ex Libris
<input checked="" type="checkbox"/> public	admin_type		By Ex Libris
<input checked="" type="checkbox"/> public	authentication.type		By Ex Libris
<input checked="" type="checkbox"/> 0.NA/2281	authentication.public.ha		By Ex Libris
<input checked="" type="checkbox"/> 300	authentication.public.inc		By Ex Libris
<input checked="" type="checkbox"/> C:/hs/svr_1/admpriv.bin	authentication.public.pri		By Ex Libris
<input checked="" type="checkbox"/> passphrase	authentication.public.pa		By Ex Libris
<input checked="" type="checkbox"/> true	reqParams.use		By Ex Libris
<input checked="" type="checkbox"/> false	reqParams.authoritative		By Ex Libris
<input checked="" type="checkbox"/> false	reqParams.certify		By Ex Libris
<input checked="" type="checkbox"/> true	reqParams.ignoreRestri		By Ex Libris

Cancel Save

Figure 71: Persistent Identifier Publishing Profile (Public/Private Key)

### Publishing Profile Using a Secret Key

When configuring a profile for publishing a PID using a secret key, Administrators define the fields as described in the following table:

Table 19. Secret Key Parameters

Parameter	Defines...
authentication.type	The authorization type
authentication.secret.handleName	The name of a handle on the server that contains authentication information. Usually, the name of a handle is the handle prefix followed by /ADMIN.
authentication.secret.index	Index that defines where authentication information is stored in the handle
authentication.secret.pass	Secret key's password

The screenshot shows a web interface for configuring a Persistent Identifier (PI) publishing profile. The breadcrumb path is: Home > Advanced Configuration > Repository > Persistent Identifiers > Mapping Tables. The page is titled 'Table Information' and shows the following details:

- Sub System: Persistent Identifiers
- Table Name: Handle PI Publishing - Secret Key
- Updated by: Ex Libris
- Updated on: Tue Nov 17 18:20:48 IST 2009
- Table Description: Handle PI Publishing - Secret Key

Below this is a 'Mapping Table Rows' section with a table containing 15 rows. Each row has a checkbox in the first column, followed by columns for Value, Name, Description, and Last Updated. The 'Last Updated' column for all rows is 'By Ex Libris'.

	Value	Name	Description	Last Updated
<input checked="" type="checkbox"/>	handle	pi_type		By Ex Libris
<input checked="" type="checkbox"/>	com.exlibris.digitool.rep	pi_publisher_class		By Ex Libris
<input checked="" type="checkbox"/>	handle	premisType		By Ex Libris
<input checked="" type="checkbox"/>	secret	authentication.type		By Ex Libris
<input checked="" type="checkbox"/>	12345/ADMIN	authentication.secret.h		By Ex Libris
<input checked="" type="checkbox"/>	300	authentication.secret.ir		By Ex Libris
<input checked="" type="checkbox"/>	ex2000	authentication.secret.p		By Ex Libris
<input checked="" type="checkbox"/>	secret	admin.type		By Ex Libris
<input checked="" type="checkbox"/>	12345/ADMIN	admin.secret.handleNa		By Ex Libris
<input checked="" type="checkbox"/>	300	admin.secret.index		By Ex Libris
<input checked="" type="checkbox"/>	ex2000	admin.secret.pass		By Ex Libris
<input checked="" type="checkbox"/>	true	reqParams.use		By Ex Libris
<input checked="" type="checkbox"/>	false	reqParams.authoritative		By Ex Libris
<input checked="" type="checkbox"/>	false	reqParams.certify		By Ex Libris
<input checked="" type="checkbox"/>	true	reqParams.ignoreRestr		By Ex Libris

At the bottom of the form are 'Cancel' and 'Save' buttons.

Figure 72: Persistent Identifier Publishing Profile (Secret Key)

## Configuring Creation Rules

To define the profile that the Rosetta system must use to create a PID, Administrators configure creation rules. If multiple rules are defined, the Rosetta system applies the first rule found.

Administrators work with creation rules using the List of Creation Rules page.

### To access the List of Creation Rules page:

- 1 From the Advanced Configuration page, follow the path: **Repository > Persistent Identifiers**.

The Persistent Identifiers page opens.

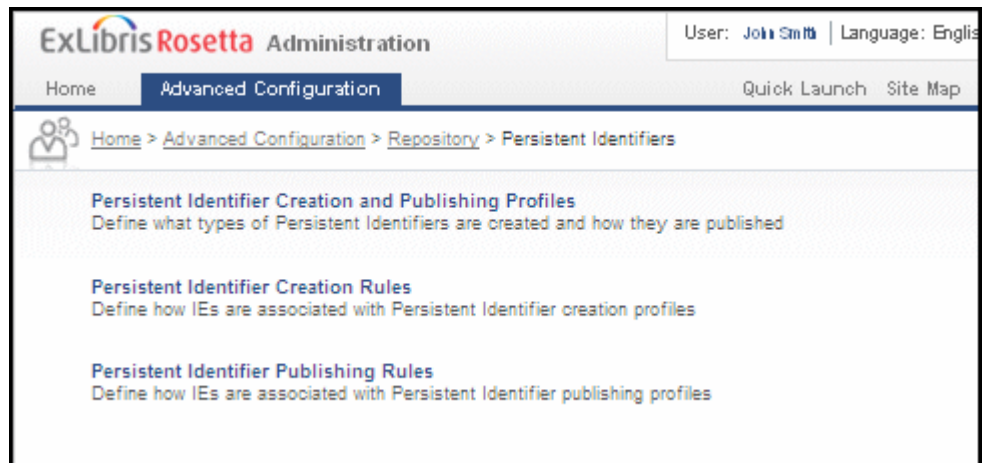


Figure 73: Persistent Identifiers Page

2 Click **Persistent Identifier Creation Rules**.

The Rule List page opens.

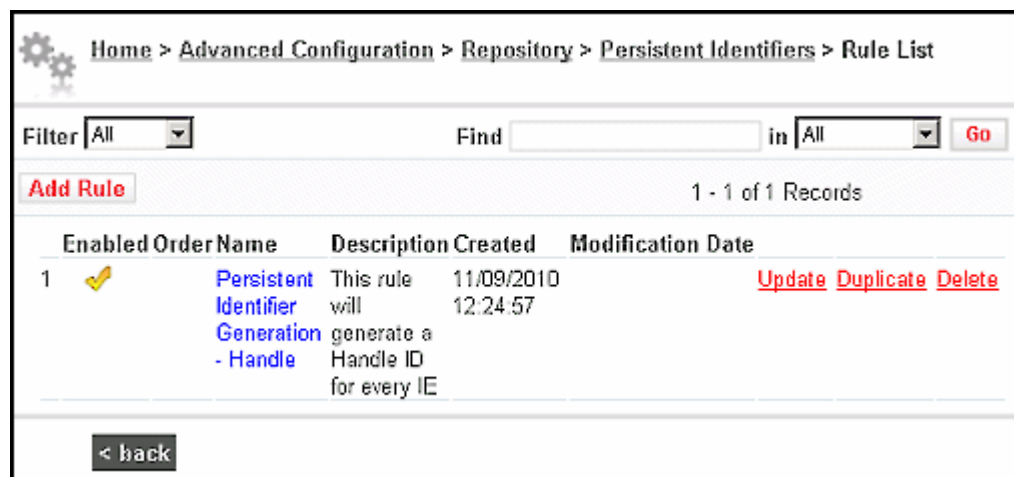


Figure 74: List of Creation Rules Page

The following actions can be performed from the Rule List page:

- **Adding a Creation Rule** on page 130
- **Duplicating a Rule** on page 131
- **Updating a Creation Rule** on page 131
- **Deleting a Creation Rule** on page 131
- **Activating and Deactivating a Creation Rule** on page 132
- **Re-ordering the List of Creation Rules** on page 132

## Adding a Creation Rule

Administrators can add new creation rules to define how a PID must be created. When adding a creation rule, Administrators define general information for the rule (such as the name and description of the rule), input parameters (such as object type or Producer ID), and output parameters (such as the handle profile).

### To add a creation rule:

- 1 On the List of Creation Rules page (see [Configuring Creation Rules](#) on page 128), click **Add Rule**. The Rule Details page opens.

Dnx Section	Dnx Section Key	Operator	Value
producer	primarySeedURL	InList	

Figure 75: Rule Details Page

- 2 In the **Name** and **Description** fields, enter the information for the rule.
- 3 In the **Input Dynamic Parameters** pane, define parameters and their values. For details about operators and parameters, see [Operators Used in Rule Parameters](#) on page 51.
- 4 In the **Output Parameters** pane, in the **Handle Profile** field, enter the name of a handle profile to be used for creating the rule. (For more information on configuring profiles, see [Configuring Creation and Publishing Profiles](#) on page 124.)
- 5 Click **Save**. The rule is displayed on the List of Creation Rules page.

The Rosetta system now uses the rule when creating PIDs.

### *Duplicating a Rule*

Administrators can duplicate rules. This is especially helpful when creating a new rule. It is often faster to duplicate an existing rule and modify it, than to create a new rule.

#### **To duplicate a rule:**

On the Persistent Identifier Creation and Publishing Rules page, locate the rule you want to duplicate and click **Duplicate**. The Rosetta system creates a copy of the rule.

An exact rule of the Producer profile is added to the Persistent Identifier Creation and Publishing Rules page. The Rosetta system automatically labels the new rule with the name `Copy of` followed by the name of the original rule. Edit the rule as needed and save.

### *Updating a Creation Rule*

Administrators can update general information, input and output parameters of an existing creation rule.

#### **To update a creation rule:**

- 1 On the List of Creation Rules page (see **Configuring Creation Rules** on page 128), locate the creation rule you want to update and click **Update**. The Rule Details page opens.
- 2 Modify the fields you want to update, and click **Save**.

The creation rule is updated in the Rosetta system.

### *Deleting a Creation Rule*

Administrators can delete an existing creation rule.

---

#### **NOTE:**

After deleting a creation rule, it is no longer available to the Rosetta system for matching.

---

#### **To delete a creation rule:**

- 1 On the List of Creation Rules page (see **Configuring Creation Rules** on page 128), locate the creation rule you want to delete and click **Delete**. The confirmation page opens.
- 2 Click **OK**.

The creation rule is deleted from the Rosetta system.

### ***Activating and Deactivating a Creation Rule***

Administrators can activate or deactivate a creation rule. After deactivating a creation rule, it is no longer available to the Rosetta system for matching.

On the List of Creation Rules page, the creation rule's status is indicated by the check mark in the **Active** column:

- Yellow - The creation rule is active.
- Grey - The creation rule is inactive.

#### **To activate or deactivate a creation rule:**

- 1 On the List of Creation Rules page (see **Configuring Creation Rules** on page 128), locate the creation rule you want to activate or deactivate.
- 2 In the **Active** column, click the check mark. The check mark in the **Active** column indicates the new status.

The creation rule is changed from active to inactive, or from inactive to active.

### ***Re-ordering the List of Creation Rules***

To define the handle profile that must be used for a specific content object, the Rosetta system compares the input parameters defined in a creation rule with the parameters of the content object.

The creation rules are analyzed in the same order as they are displayed on the List of Creation Rules page. The Rosetta system uses the first creation rule found that matches the parameters of the content object.

An Administrator can re-order creation rules to change their priority.

#### **To re-order the list of creation rules:**

- On the List of Creation Rules page (see **Configuring Publishing Rules** on page 132), select the rule, and then use the up and down arrows to change the rule's priority.

The Rosetta system now analyzes the creation rules in the newly defined order.

## **Configuring Publishing Rules**

To define the profile that the Rosetta system must use to publish a PID, Administrators configure publishing rules. If multiple rules are defined, the Rosetta system applies all the rules that satisfy an object's parameters.

Administrators work with publishing rules using the List of Publishing Rules page.

To access the List of Publishing Rules page:

- 1 From the Advanced Configuration page, follow the path: **Repository > Persistent Identifiers**.

The Persistent Identifiers page opens.

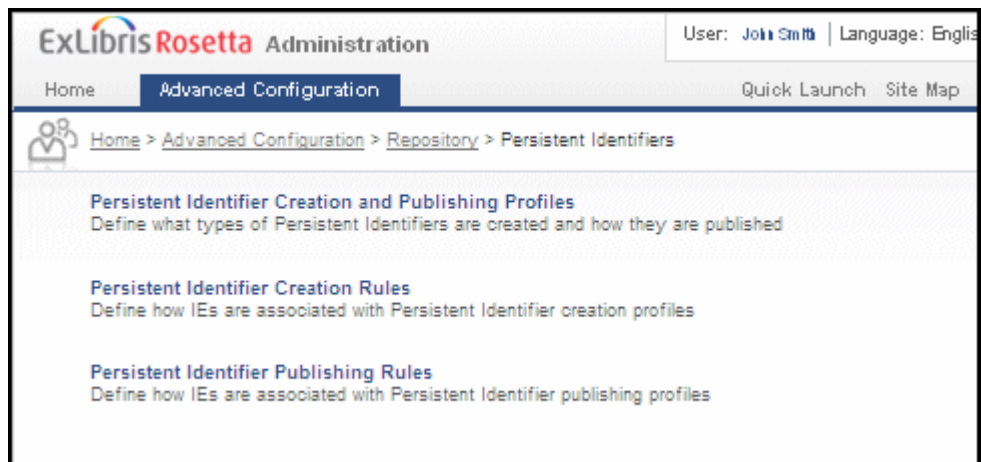


Figure 76: Persistent Identifiers Page

- 2 Click **Persistent Identifier Publishing Rules**.

The Rule List page opens.



Figure 77: Rule List Page for Publishing Rules

The following actions can be performed on the List of Creation Rules page:

- **Adding a Publishing Rule** on page 134
- **Updating a Publishing Rule** on page 135
- **Deleting a Publishing Rule** on page 135
- **Activating and Deactivating a Publishing Rule** on page 135
- **Re-Ordering the List of Publishing Rules** on page 136

## Adding a Publishing Rule

Administrators can add new publishing rules to define how a PID must be published. When adding a publishing rule, Administrators define general information for the rule (such as the name and description of the rule), input parameters (such as object type or Producer ID), and output parameters (such as the handle profile).

### To add a publishing rule:

- 1 On the List of Publishing Rules page (see [Configuring Publishing Rules](#) on page 132), click **Add Rule**. The Rule Details page opens.

Home > Advanced Configuration > Repository > Persistent Identifiers > Rule Details

**Rule Editor**

Name:

Description:

Created By: Smith John      Created on: 03/02/2010 04:41:39  
Updated By: Ex Libris      Last Update on: 03/02/2010 04:41:39

**Input Dynamic Parameters:**

Dnx Section	Dnx Section Key	Operator	Value
producer	primarySeedURL	InList	<input type="text"/>

**Output Parameters:**

Parameter	Result
Handle Publisher	<input type="text"/>

Cancel      Save

Figure 78: Rule Details Page

- 2 In the **Name** and **Description** fields, enter the information for the rule.
- 3 In the **Input Dynamic Parameters** pane, define parameters and their values. For more information about parameters and operators, see [Operators Used in Rule Parameters](#) on page 51.
- 4 In the **Output Parameters** pane, in the **Handle Publisher** field, enter the name of a handle profile to be used for publishing the rule. (For more information about configuring profiles, see [Configuring Creation and Publishing Profiles](#) on page 124.)
- 5 Click **Save**.

The Rule List page opens with the new rule in the list.

The Rosetta system now uses the rule when publishing PIDs.

### *Updating a Publishing Rule*

Administrators can update general information, input and output parameters of an existing publishing rule.

#### **To update a publishing rule:**

- 1 On the List of Publishing Rules page (see **Configuring Publishing Rules** on page 132), locate the creation rule you want to update and click **Update**.  
The Rule Details page opens.
- 2 Modify the fields you want to update, and then click **Save**.  
The publishing rule is updated in the Rosetta system.

### *Deleting a Publishing Rule*

Administrators can delete an existing publishing rule.

---

#### **NOTE:**

After deleting a publishing rule, it is no longer available to the Rosetta system for matching.

---

#### **To delete a publishing rule:**

- 1 On the List of Publishing Rules page (see **Configuring Publishing Rules** on page 132), locate the publishing rule you want to delete and click **Delete**.  
A confirmation page opens.
- 2 Click **OK**.  
The publishing rule is deleted from the Rosetta system.

### *Activating and Deactivating a Publishing Rule*

Administrators can activate or deactivate a publishing rule. After deactivating a publishing rule, it is no longer available to the Rosetta system for matching.

On the List of Publishing Rules page, the publishing rule's status is indicated by the check mark in the **Active** column:

- Yellow - The publishing rule is active.
- Grey - The publishing rule is inactive.

### To activate or deactivate a publishing rule:

- 1 On the List of Publishing Rules page (see **Configuring Publishing Rules** on page **132**), locate the publishing rule you want to activate or deactivate.
- 2 In the **Active** column, click the check mark. The check mark in the **Active** column indicates the new status.

The publishing rule is changed from active to inactive, or from inactive to active.

### *Re-Ordering the List of Publishing Rules*

To define the handle profile that must be used for a specific content object, the Rosetta system compares the input parameters defined in a publishing rule with the parameters of the content object.

The publishing rules are analyzed in the same order as they are displayed on the List of Publishing Rules page. The Rosetta system uses the first publishing rule found that matches the parameters of the content object.

An Administrator can re-order publishing rules to change their priority.

### To re-order the list of publishing rules:

- On the List of Publishing Rules page (see **Configuring Publishing Rules** on page **132**), select the rule, and then use the up and down arrows to change the rule's priority.

The Rosetta system now analyzes the publishing rules in the newly defined order.

# 8

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## Bytestream Extraction Rules

This section contains:

- [About Bytestream Extraction Rules](#) on page 137
- [Bytestreams in Task Chains](#) on page 137
- [New Bytestream Extraction Rule](#) on page 138
- [Rule List](#) on page 138
- [Adding a Bytestream Extraction Rule](#) on page 139
- [Additional Bytestream Rule Actions](#) on page 141

### About Bytestream Extraction Rules

In order to provide bytestream support, Rosetta has set up a plug-in extraction tool for a bytestream-related task chain. The task chain is used during SIP processing for new deposits, as part of a maintenance job, or as part of an Add Representation task.

### Bytestreams in Task Chains

The task chain includes a virus check, format identification, technical metadata extraction, and risk extraction. Should the extraction process fail at any stage, the entire SIP is routed to a Technical Analyst for handling.

When a file contains bytestreams (for example, a multi-TIFF file), Rosetta extracts the bytestreams and runs them through the validation stack. The metadata is kept separately for each bytestream while the file itself is kept in the permanent directory as is, not extracted.

## New Bytestream Extraction Rule

A new rule available from the SIP Routing Rules page defines the following:

- Input: Dynamic input – All IE, REP, and File DNX attributes will be available.
- Output: Bytestream Extraction Tool – Extracts bytestreams out of a bytestream file. The list of bytestream extraction tools will be driven from the plug-in manager and will include all DecomposerPlugin extractors

## Rule List

Which extraction rule to use when processing a file containing bytestreams is determined by bytestream type and rule precedence as configured by the Administrator.

To access the list of bytestream extraction rules:

Follow this path from the Advanced Configuration page:

- **SIP Processing > Processing Definitions > Bytestream Extraction Rules.**  
The Rule List page for bytestream extractions opens.

Enabled	Order	Name	Description	Created	Modification Date	
<input checked="" type="checkbox"/>	1	Extraction Rule		03/02/2012 01:16:27	03/02/2012 01:16:27	<a href="#">Update</a> <a href="#">Duplicate</a> <a href="#">Delete</a>
<input checked="" type="checkbox"/>	2	ZIP rule	Extracting ZIP files	17/11/2009 18:17:53	03/02/2012 01:16:27	<a href="#">Update</a> <a href="#">Duplicate</a> <a href="#">Delete</a>
<input checked="" type="checkbox"/>	3	WARC rule	Extracting WARC files	31/12/2009 20:10:54	31/12/2009 20:19:51	<a href="#">Update</a> <a href="#">Duplicate</a> <a href="#">Delete</a>

Figure 79: Rule List Page for Bytestream Extractions

The list can be filtered by All, Active, and Inactive rules. The page also includes a search field that allows the user to narrow the display of bytestream extraction rules. Drop-down attributes following the **Find [term] in** equation (such as the attributes/fields **Name** and **Description**) can be used to focus a list containing many entries.

The Bytestream Extractions Rule List page allows for additional actions described in the table below.

Table 20. Bytestream Rule List - Available Actions

Action	Description
Add Rule	Launches the Bytestream Extraction Rule Editor in Add mode. Allows the user to add a new rule. See <a href="#">Adding a Bytestream Extraction Rule</a> on page 139.
Enable/Disable check mark	A clear check mark indicates that the rule in that row is inactive. A filled-in check mark indicates that the rule in that row is active. When a rule is deactivated, the system ignores the rule when processing incoming SIPs. Clicking the check mark will toggle the value from activated to deactivated and vice versa.
Order	If more than one rule is active, the order of the rules (top to bottom, lowest number to highest), determines the order in which the rules are processed. Users can click the up and down triangles to change the order of a rule.
<i>Rule Name</i> / Update	Launches the Bytestream Extraction Rule Editor in Update mode (the values and operators of this rule's parameters are loaded into the editor). See <a href="#">Edit/Update</a> on page 141.
Duplicate	Adds a new entry to the Rules List that is identical to the rule in this row. The system refreshes the Rules List. See <a href="#">Duplicate</a> on page 141.
Delete	Deletes the rule in this row. See <a href="#">Delete</a> on page 141.

## Adding a Bytestream Extraction Rule

Users can add a bytestream extraction rule from the Rule List page for bytestream extractions.

### To add a new extraction rule:

- 1 From the Rule List page for bytestream extractions, click the **Add Rule** button.

The Bytestream Extraction Rule Editor opens in Add mode (see figure below).

The screenshot shows the 'Rule Editor' interface. At the top, there is a breadcrumb trail: Home > Advanced Configuration > SIP Processing > Processing Definitions > Rules for Bytestream MD Extraction > Rule Details. Below this, the 'Rule Editor' section contains fields for 'Name' and 'Description'. It also displays metadata: 'Created By: Smith John', 'Created on: 03/02/2010 01:41:48', 'Updated By: Ex Libris', and 'Last Update on: 03/02/2010 01:41:48'. The 'Input Dynamic Parameters' section is a table with columns: Dnx Section, Dnx Section Key, Operator, and Value. The first row shows 'webHarvesting' in the Dnx Section, 'Find Keys ->' as a button, 'primarySeedURL' in the Dnx Section Key, 'InList' in the Operator, and an empty text field in the Value column. An 'Add Dnx' button is to the right. The 'Output Parameters' section has a table with columns: Parameter, Extractor Plugin Name, and Result. The first row shows an empty text field for Parameter, 'Extractor Plugin Name' for Extractor Plugin Name, and 'unzip' in the Result dropdown. 'Cancel' and 'Save' buttons are at the bottom.

Figure 80: Rule Editor - Adding a Bytestream Rule

The page is divided into three sections: rule details, Input Dynamic Parameters, and Output Parameters. The input parameters are dynamic and user-defined based on drop-down and text fields. The output parameters are fixed; users cannot add or delete them, though they can select a plug-in from the drop-down list.

- 2 Enter a name and description for the rule in the top pane of the Rule Editor.
- 3 To add an input parameter from the DNX elements, enter values in the Input Dynamic Parameters section by creating an equation from left to right, as follows:
  - a Select an item from the **Dnx Section** drop-down menu.
  - b Click the **Find Keys** button to display keys belonging to the section selected.
  - c Select an item from the **DNX Section Key** drop-down menu.
  - d Select an operator from the **Operator** drop-down list. For a complete explanation of operators, see [Operators Used in Rule Parameters](#) on page 51.
  - e Enter the value you want to search for in the DNX parameter.
  - f Click the **Add Dnx** button.

The page refreshes with the input parameter you defined displaying between the section headings and the fields.

- 4 To select an extractor plug-in for an output parameter, select a plug-in name from the drop-down field next to the Extractor Plugin Name.

---

**NOTE:**

Users cannot select output parameters but may be able to select the plugins associated with those parameters.

---

- 5 Click the **Save** button. (To discard the rule, click the **Cancel** button.  
The new rule displays in the list of rules for bytestream extractions. By default, the new rule appears at the bottom of the list and is enabled.

## Additional Bytestream Rule Actions

In addition to adding a new rule, the following actions can be performed from the Rule List page:

### Edit/Update

Edit any rule listed on the Rule List page by clicking the name of the rule or the **Update** text link in the row of the rule.

The Bytestream Extraction Rule Editor opens with information for the rule selected.

Make changes to the Name, Description, or input parameters for the rule. Add or delete any parameters. For a complete explanation of operators, see [Operators Used in Rule Parameters](#) on page 51.

If available, users can also change the selection for the output plugin.

### Duplicate

Use the duplication feature to create a back-up of an existing rule or to create a new rule with many of the same values and attributes as an existing rule.

To create a copy of a rule, click the **Duplicate** text link in the row of the rule you want to copy. The system does the following:

- Adds an identical rule to the database
- Names the duplicated rule *Copy of [original rule name]*
- Refreshes the Rule List page with the newly duplicated and named rule

Edit/update the new rule as needed.

### Delete

To delete a rule from the Rule List page (and from the Rosetta system), click the **Delete** text link in the rule's row. Confirm the action when the confirmation box opens. The Rule List page refreshes without the deleted rule.



# 9

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## User Management

This section contains:

- **Understanding Rosetta System Users** on page 143
- **Registration Process and Rules** on page 147
- **Managing Users** on page 149
- **Configuring User Parameters** on page 158
- **Working with User Roles** on page 159
- **Configuring Automatic E-mails to Users** on page 164
- **Defining User Mandatory Fields** on page 166
- **User Authentication with SAML** on page 167

### Understanding Rosetta System Users

Various types of users interact with the Rosetta system. Some of these users (such as Producer Agents) provide content, while other users (such as staff users) configure the way this content is processed by the Rosetta system. For general information about Rosetta system users, see Rosetta Users in the *Rosetta Overview Guide*.

In Rosetta, the role of User Manager adds, maintains, and deletes users and their roles. Included in creating and defining roles is the determination of actions available to different users. Managers classify users by working with the following components:

- **User Profiles** on page 144
- **User Type** on page 146

## User Profiles

The actions that a user can perform in the Rosetta system are defined by the user profile. User profiles define the following parameters:

- User role (see [User Roles](#) on page 144)
- User role parameters (see [User Role Parameters](#) on page 145)
- User role permissions (see [User Role Permissions](#) on page 145)
- User scope (see [User Scope](#) on page 146)
- User type (see [User Type](#) on page 146)

To allow a user to work with the Rosetta system, the User Manager must associate the user with a user role profile. Otherwise, a user cannot perform any actions within the system.

## User Roles

User roles define the actions that a user can perform within the Rosetta system framework. The following roles are supported:

Table 21. Rosetta User Roles

Role	Description
Producer Agent	Deposits the content provided by Producers. (For more information, see Producers and Producer Agents in the <i>Rosetta Producer's Guide</i> .)
Deposit Manager	Configures generic Producer profiles and material flows. (For more information, see Part II, Deposit Managers in the <i>Rosetta Staff User's Guide</i> .)
Negotiator	Personalizes generic Producer profiles and material flows for the needs of specific Producers. (For more information, see Part III, Negotiators in the <i>Rosetta Staff User's Guide</i> .)
Assessor, Arranger, Approver	Reviews the content that Producer Agents deposit. (For more information, see Part IV, Assessors, Arrangers, and Approvers in the <i>Rosetta Staff User's Guide</i> .)
Technical Analyst	Resolves technical issues that occur with the content that Producer Agents deposit. (For more information, see Part V, Technical Analysts in the <i>Rosetta Staff User's Guide</i> .)
Editor	Edits metadata of the content deposited by Producer Agents, and adds new representations.

Table 21. Rosetta User Roles

Role	Description
Data Manager	Schedules and monitors processes, manages sets, publishes configurations, and runs activities that affect multiple IEs.
Preservation Analyst	Performs all tasks associated with risk analysis and loss prevention, including populating Preservation libraries, performing risk analyses on existing library collections, and creating, testing, and running plans and plan alternates.
Preservation Manager	Performs all tasks associated with risk analysis and loss prevention, including all the responsibilities of a Preservation Analyst plus signing off on and rejecting preservation plans.
User Manager	Creates and manages user accounts. (For more information, see <a href="#">Managing Users</a> on page 149.)
ExLibris Support	Reserved for use by the Ex Libris support team.
Back Office Administrator	Configures the Rosetta system and working environment

Multiple roles can be assigned to a single user. For example, a User Manager can associate a user with the roles of Deposit Manager and Producer Agent, which enable the Deposit Manager to not only configure the Rosetta system, but to deposit content as well. Alternatively, each role can be associated with a separate user.

The list of user roles and their responsibilities are predefined and cannot be changed by User Managers. (For example, the Rosetta system does not enable adding a new role.) However, User Managers can enable or disable particular actions within a role for a specific user.

### *User Role Parameters*

User role parameters determine which particular predefined role actions are available to a specific user.

For example, a User Manager can use role parameters to assign a certain Producer group (such as Published and Un-Published) to a Technical Analyst. An Assessor might be assigned a parameter for which kind of metadata to edit - descriptive, source, or access rights.

### *User Role Permissions*

User role permissions determine the degree to which a user can make changes to data in the system. The three levels of permissions are:

- View - can view objects but not edit or delete any kind of data.
- Typical - can edit but not delete data in the system.
- Full - can edit and also delete data in the system.

### *User Scope*

User roles are also associated with scope in terms of their level within a consortium.

- Consortium - Users with this scope can view and operate on objects that belong to all of the institutions in the consortium collectively. The following roles can have this scope: SystemAdministrators, Editors, Data Managers, Preservation Analysts, and Preservation Managers.
- Institution - Users with this scope can work only on items (IEs, configuration items) within their own institution. All roles can be assigned an institutional scope.
- Department - Users with this scope can operate only on IEs that belong to their department. This scope is only relevant for Editors.

### *User Type*

The Rosetta system enables User Managers to group users into types, as described in the following table.

Table 22. The Rosetta System User Types

User Type	Includes...
Public	Producer Agents  <hr/> <b>NOTE:</b> Individual Producers are considered Producer Agents who deposit content on their own behalf.
Staff	<ul style="list-style-type: none"> <li>■ Deposit Managers</li> <li>■ Negotiators</li> <li>■ Assessors, Arrangers, Approvers</li> <li>■ Technical Analysts</li> <li>■ Editors</li> <li>■ Administrators</li> </ul>

Table 22. The Rosetta System User Types

User Type	Includes...
Organization	<p>Group Producers</p> <hr/> <p><b>NOTE:</b> Organization users cannot log in to the Rosetta system and work with the system directly. Producer Agents who are associated with Group Producers can deposit content on these Producers' behalf.</p> <hr/>
Contact	<p>Individual users who serve as contacts for Group Producers. A contact user can either be one of the Producer Agents, or a dedicated user.</p> <hr/> <p><b>NOTE:</b> Contact users cannot log in to the Rosetta system and work with the system directly unless they are associated with the Producer Agent role.</p> <hr/>

## Registration Process and Rules

When Producer Agents register in the Rosetta system, they must specify the type of material they plan to deposit by selecting one of the predefined options. Administrators can define these options using the Registration Reason code table.

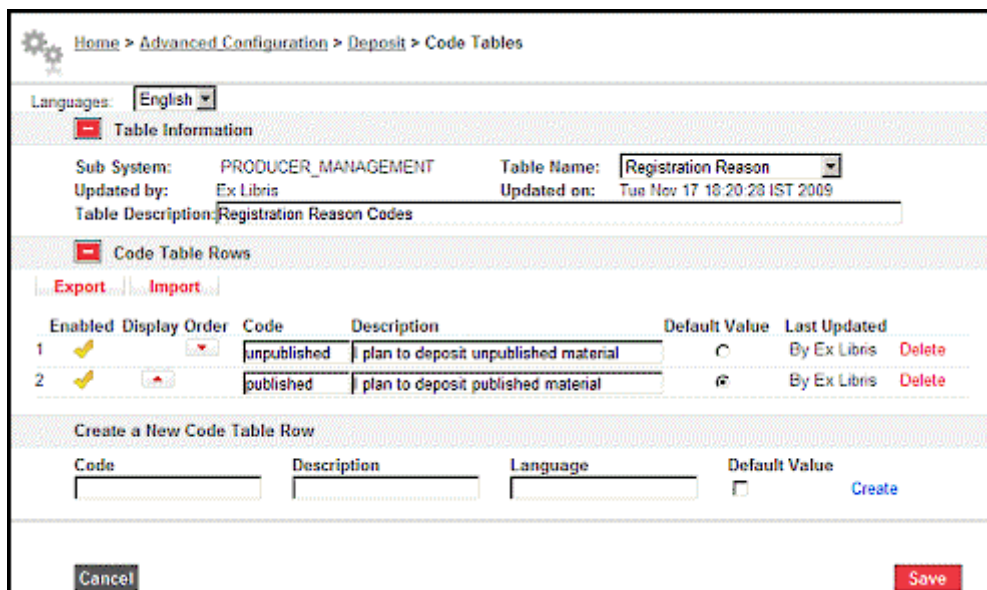


Figure 81: Registration Reason Code Table

When a new Producer is registered in the Rosetta system, the system automatically assigns a Producer profile, Producer group, and a status to the new user. Administrators can configure this assignment using the Deposit Registration Rules mapping table.

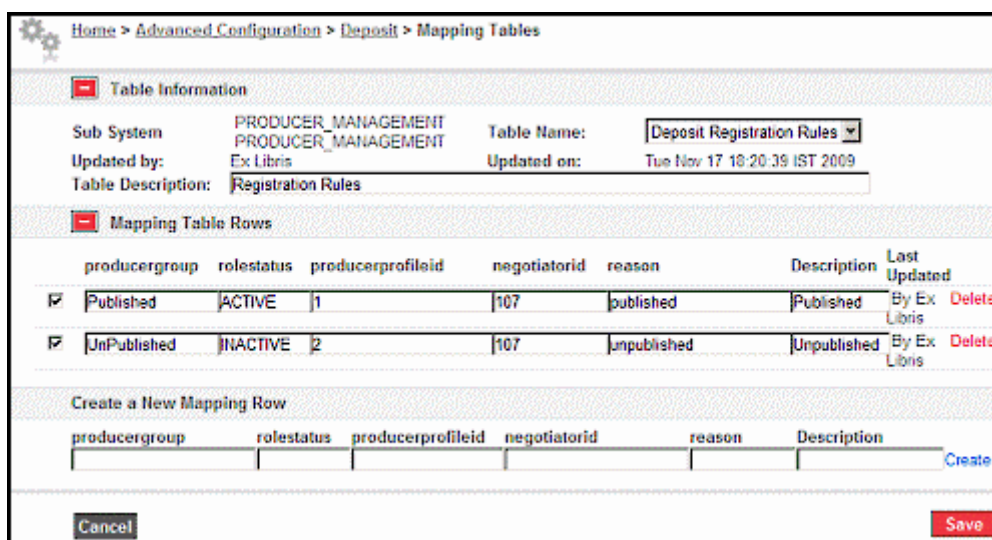


Figure 82: Deposit Registration Rules Mapping Table

Administrators can work with the Deposit Registration Rules mapping table as described in [Working with Mapping Tables](#) on page 238.

## Managing Users

---

### NOTE:

Administrators require the **User Manager** role to manage users in Rosetta.

---

The Rosetta system enables Administrators to manage different types of users, which includes adding new users, searching users, and deleting users. Administrators can manage users from the User List page.

To access the User List page, follow the path from the Advanced Configuration page to **Users > User Management**.

The following actions can be performed on this page:

- **Adding a User** on page 149
- **Cloning a User** on page 154
- **Updating a User** on page 154
- **Deleting a User** on page 157
- **Releasing the Work of a User** on page 157
- **Sharing Users** on page 157

### Adding a User

Administrators can add a new user to the Rosetta system. The process of adding a new user consists of the following steps:

- 1 Providing user information, such as a user name, password, and status
- 2 Assigning a role
- 3 Providing information about the role, which includes defining role parameters

#### To add a user:

- 1 On the User List page (see **Managing Users** on page 149), click **Add User**.  
The User Details page opens.

ID	-	Creation Date	07/12/2017	Created by	John Smith
Record Type	Staff	Update Date	07/12/2017	Updated by	John Smith

**User Information**

* User Name	<input type="text"/>	Language	English
* First Name	<input type="text"/>	* Last Name	<input type="text"/>
* Job Title	<input type="text"/>	Middle Name	<input type="text"/>
* Email	<input type="text"/>	Expiry Date	dd/MM/yyyy <input type="text"/>
Status	Active	Shared	<input type="checkbox"/>
* Telephone 1	<input type="text"/>	Telephone 2	<input type="text"/>

**User Group**

0 items selected	Add	Remove all	<input type="text"/>	Add all																																			
<table style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 40%;">affiliate</td><td style="width: 10%; text-align: center;">+</td><td style="width: 10%;"></td><td style="width: 30%;"></td><td style="width: 10%; text-align: right;">+</td></tr> <tr><td>alum</td><td style="text-align: center;">+</td><td></td><td></td><td style="text-align: right;">+</td></tr> <tr><td>employee</td><td style="text-align: center;">+</td><td></td><td></td><td style="text-align: right;">+</td></tr> <tr><td>student</td><td style="text-align: center;">+</td><td></td><td></td><td style="text-align: right;">+</td></tr> <tr><td>library-walk-in</td><td style="text-align: center;">+</td><td></td><td></td><td style="text-align: right;">+</td></tr> <tr><td>member</td><td style="text-align: center;">+</td><td></td><td></td><td style="text-align: right;">+</td></tr> <tr><td>staff</td><td style="text-align: center;">+</td><td></td><td></td><td style="text-align: right;">+</td></tr> </table>					affiliate	+			+	alum	+			+	employee	+			+	student	+			+	library-walk-in	+			+	member	+			+	staff	+			+
affiliate	+			+																																			
alum	+			+																																			
employee	+			+																																			
student	+			+																																			
library-walk-in	+			+																																			
member	+			+																																			
staff	+			+																																			

Website URI	<input type="text"/>
* Street	<input type="text"/>
Suburb	<input type="text"/>
City	<input type="text"/>
Country	Afghanistan
Postal Code	<input type="text"/>

**Additional Identifiers**

* Authentication Profile	* Value
dfgdf	<input type="text"/>
<a href="#" style="color: #0070C0;">Add</a>	

**User Authentication**

Type

- External - Refers to a user type whereby user information is managed in third-party IAM system or directory server, and that data is used by the Rosetta.
- Internal with External Authentication - The same as internal with the exception that the authentication is managed externally.
- Internal - Refers to a user type whereby the user information is managed wholly within the Rosetta.

* Password	<input type="text"/>	* Verify Password	<input type="text"/>
------------	----------------------	-------------------	----------------------

[Back](#)
[Save](#)

Figure 83: User Details Page

- 2 In the **User Information** page, provide the information as requested. For the User Group section, select the user groups to which you want to assign the

user. To add a new user group, enter the name of the user group and click **Add**.

- 3 In the **Additional identifiers** pane, in the **Authentication Profile** field, enter the name of the SAML server and in the **Value** field, enter the identifier. Click **Add** to add the additional identifier. Rosetta can perform SAML authentication using any of the identifiers you configure.
- 4 In the **User Authentication** pane, indicate if the user is managed externally, internally with external authentication, or internally.

---

**NOTE:**

All fields with an asterisk (\*) are mandatory.

---

- 5 Click **Save**. The Add New Roles page opens.

The screenshot shows a web interface for adding roles. At the top, there is a breadcrumb navigation: [Home](#) / [Data Management: Manage Users](#) / [Details](#). Below this is a table with a blue header row containing the text "Description". The table lists 25 roles, each with an unchecked checkbox in the first column and the role name in the second column. At the bottom right of the table area, there are two buttons: a "Cancel" button and a blue "Add Roles" button.

	Description
<input type="checkbox"/>	Approver - Full
<input type="checkbox"/>	Approver - Typical
<input type="checkbox"/>	Approver - View
<input type="checkbox"/>	Arranger - Full
<input type="checkbox"/>	Arranger - Typical
<input type="checkbox"/>	Arranger - View
<input type="checkbox"/>	Assessor - Full
<input type="checkbox"/>	Assessor - Typical
<input type="checkbox"/>	Assessor - View
<input type="checkbox"/>	Data Manager - Full
<input type="checkbox"/>	Data Manager - Typical
<input type="checkbox"/>	Deposit Manager - Full
<input type="checkbox"/>	Deposit Manager - Typical
<input type="checkbox"/>	Editor - Full
<input type="checkbox"/>	Editor - Typical
<input type="checkbox"/>	Editor - View
<input type="checkbox"/>	Exlibris - Support
<input type="checkbox"/>	Negotiator - Full
<input type="checkbox"/>	Negotiator - Typical
<input type="checkbox"/>	Negotiator - View
<input type="checkbox"/>	Preservation Analyst
<input type="checkbox"/>	Preservation Manager
<input type="checkbox"/>	TA - Full
<input type="checkbox"/>	User manager - Full
<input type="checkbox"/>	User manager - Typical
<input type="checkbox"/>	User manager - View

Figure 84: Add New Roles Page

- 6 Select the roles that you want assign to the user. For detailed information, see [Working with User Roles](#) on page 159.
- 7 Click **Add Roles**. The User Role Details page opens.

🏠 / Data Management: Manage Users / Details

User ID	51962	Created on	07/12/2017	Created by	Ex Libris
User Name	John Doe	Updated on	07/12/2017	Updated by	Ex Libris
Role Name	Approver - Full				

### Role Information

Scope: Demo Institution

Status:  Status Date:

Expiry Date:

Notes:

### Role Parameters

\* Approval Group

- Un-published Approver
- JIC Internal Approver
- Published Approver

\* Metadata Type

- DC
- Source Copyrights
- Source Rights
- Source Other
- Source Marc
- Access Rights
- Source EAD
- Source Dc
- Source Mods
- DNX
- Struct Map

Figure 85: User Role Details Page

- 8 Provide the information as requested.

---

**NOTE:**

The list of parameters displayed in the User Role Parameters pane varies depending on the user role.

---

- 9 Click **Save**. The new user is saved in the Rosetta system.

The user now can log on and work with the Rosetta system, according to the defined user role.

## Cloning a User

To create a new user with the same roles as an existing one, you can clone the existing one. Cloning creates the same user with the following characteristics and limitations:

- Limited to Staff users
- In the Management (institution) UI, cloning is limited to roles scoped to the current institution
- In the Administration (consortium) UI, roles across all institutions are duplicated

Note: User roles cannot be edited until the new user's information is saved. After adding user information, click **Save** to save a user with the same roles, or click **Apply** to save the user information and edit the user roles.

## Updating a User

Administrators can update both the general user information and the user roles of an existing user.

**To update a user:**

- 1 On the User List page (see [Managing Users](#) on page 149), locate the user you want to update and click **Update**. The User Details page opens.

[Home](#) / [Data Management: Manage Users](#) / [Details](#)

**ID** 100      **Creation Date** 14/09/2010      **Created by** -  
**Record Type** Staff      **Update Date** 13/03/2018      **Updated by** John Smith

### User Information

\* **User Name** admin1      **Language** English  
 \* **First Name** John      \* **Last Name** Smith  
 \* **Job Title** developer      **Middle Name**  
 \* **Email** zvi.fass@exlibrisgroup.com      **Expiry Date** dd/MM/yyyy  
**Status** Active      **Shared**   
 \* **Telephone 1** 212-555-9874      **Telephone 2**  
**User Group**  
 1 items selected      **Add**      **Remove all**      **Add all**  
 staff      faculty      student      library-walk-in      member      affiliate      employee      alum  
**Website URL**  
 \* **Street** 1 BILLS DR  
**Suburb** ORCHARD PARK  
**City**  
**Country** United States      **Postal Code** 14127-2237

### Additional Identifiers

\* **Authentication Profile** dfgdf      \* **Value**      **Add**

### User Authentication

**Type**  External - Refers to a user type whereby user information is managed in third-party IAM system or directory server, and used by Rosetta.  
 Internal with External Authentication - The same as internal with the exception that the authentication is managed externally.  
 Internal - Refers to a user type whereby the user information is managed wholly within the Rosetta.

\* **Password** .....      \* **Verify Password** .....

### User Roles

**Add**

	Role	Details	Scope	Status Date		
1	Administration		Preservation Consortium	14/09/2010 14:30:16		
2	Administration		Preservation Consortium	14/03/2011 11:42:36		
3	Approver - Full	Published,Unpublished,Internal	Demo Institution	14/09/2010 14:30:16	<a href="#">Update</a>	<a href="#">Delete</a>
4	Approver - Full	Restricted,Unpublished,Internal,Published	INS23	21/11/2017 09:35:29		
5	Approver - Full	TP Materials	Temasek Polytechnic - Training	17/04/2014 08:59:45		

Figure 86: User Details Page

- 2 Modify the fields that you want to update.
- 3 Click **Save**.

The updated user information is saved in the Rosetta system.

## Deleting a User

To remove a user from the system and prevent all further access by that user, Administrators can delete an existing user.

### To delete a user:

- 1 On the User List page (see [Managing Users](#) on page 149), locate the user you want to delete and click **Delete**. The confirmation page opens.
- 2 Click **OK**.

The user is deleted from the Rosetta system.

## Releasing the Work of a User

You can unassign all SIPs and RIPs of a user and unlock any locked IEs. This can be useful if a user is unexpectedly unavailable for a considerable length of time, but you do not want to delete the user.

To release the work of a user, select the **Release Work** row action for the user:

The screenshot shows the 'User Management' interface. At the top, there is a search bar with 'Find' and 'Go' buttons, and a filter dropdown set to 'All'. Below the search bar are tabs for 'Staff', 'Public', 'Organization', 'Contact', and 'All'. A 'Choose type of user' dropdown is also present, along with an 'Add User' button. The main area contains a table with 4 users. The 'Release Work' button for the second user, Victoria Holmes, is highlighted with a red box.

	Name	Record Type	Account Type	Telephone	Status	Update Date	Expiry Date	Update	Clone	Release Work	Delete
1	John Smith	Staff	Internal	212-555-9874	Active	11/11/2019 17:02:45		Update	Clone	Release Work	Delete
2	Victoria Holmes	Staff	Internal	873-555-5478	Active	11/11/2019 17:02:45		Update	Clone	Release Work	Delete
3	INS00 NZ Department	Organization	Internal	123-123-123	Active	11/11/2019 17:02:45		Update			
4	Abie Ackart	Public	Internal	314-555-9381	Active	11/11/2019 17:02:45		Update			Delete

Figure 87: Release Work

## Sharing Users

You can choose to share your users with other institutions, allowing them to access these users with their management interface according to roles assigned by the user manager of the respective institution. To share users, select the **Shared** checkbox when configuring the user.

The screenshot shows a web interface for managing users. At the top, there is a breadcrumb trail: / Data Management: Manage Users / Details. Below this is a summary table with the following data:

ID	-	Creation Date	07/12/2017	Created by	John Smith
Record Type	Staff	Update Date	07/12/2017	Updated by	John Smith

Below the table is a section titled 'User Information' with a blue header. It contains several input fields and a checkbox:

- \* User Name: [Text Input]
- \* First Name: [Text Input]
- \* Job Title: [Text Input]
- \* Email: [Text Input]
- Status: [Dropdown Menu, currently set to 'Active']
- \* Telephone 1: [Text Input]
- Language: [Dropdown Menu, currently set to 'English']
- \* Last Name: [Text Input]
- Middle Name: [Text Input]
- Expiry Date: [Text Input, format dd/MM/yyyy, with a calendar icon]
- Shared: [Checkbox, currently unchecked]
- Telephone 2: [Text Input]

---

**NOTES:**

- Only Administration User Managers and the institution that created the user can set the **Shared** checkbox.
  - If the user has been assigned roles in another institution, the **Shared** checkbox cannot be cleared until those roles are removed.
  - If a Contact user is connected with a Group Producer created in another institution, the **Shared** checkbox cannot be cleared until the connection is removed.
- 

## Configuring User Parameters

Administrators configure code tables that define the following user parameters:

- Producer groups
- Material types
- Producer classification
- Local fields for describing a Producer, if necessary
- Approver groups

Administrators can access these code tables from the Code Tables List page. For more information, see [Working with Code Tables](#) on page 234.

## Working with User Roles

The Rosetta system enables Administrators to manage user roles that are assigned to individual users, which includes performing the following actions:

- **Assigning a User Role to a User** on page 159
- **Updating a User Role** on page 162
- **Activating and Deactivating a User Role** on page 163
- **Deleting a User Role** on page 164
- **Configuring Automatic E-mails to Users** on page 164

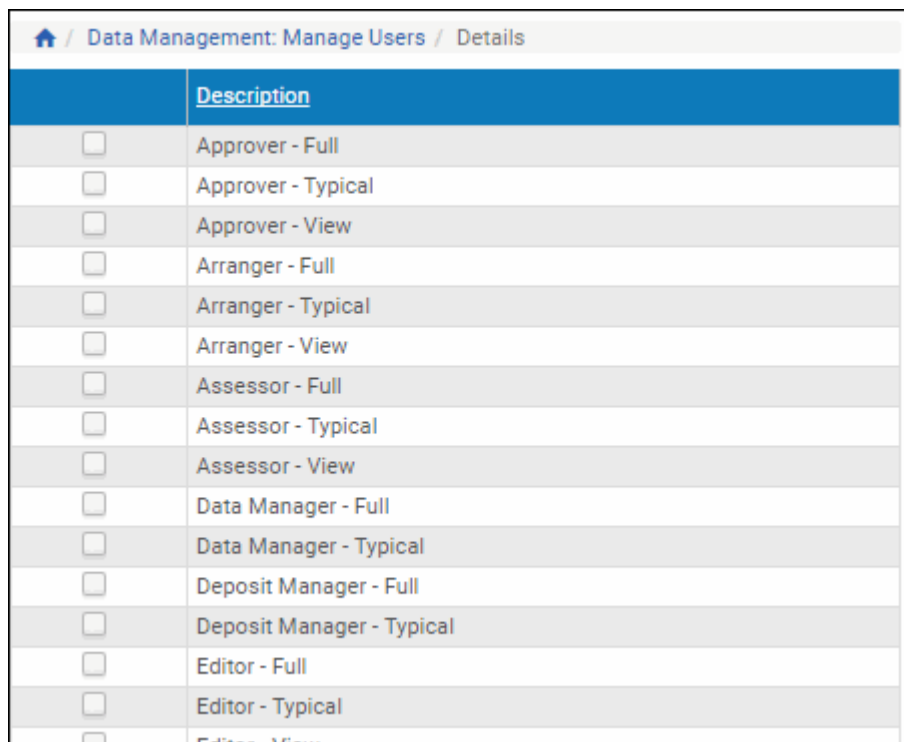
For detailed information about the roles and their privileges, see the Excel workbook in the Customer Knowledge Center: **Rosetta Roles and Privileges.xls**.

### Assigning a User Role to a User

A user role, such as Assessor or Technical Analyst, defines the user's functions and privileges. Administrators can assign multiple user roles to a user.

**To assign a user role to a user:**

- 1 On the User List page (see **Managing Users** on page 149), locate the user to whom you want to assign a role and click **Update**. The User Details page opens.
- 2 In the **User Roles** pane, click **Add Role**. The Add New Roles page opens.



The screenshot shows a web interface for managing users. At the top, there is a breadcrumb trail: [Home](#) / [Data Management: Manage Users](#) / [Details](#). Below this is a table with a blue header row containing the text "Description". The table lists various roles, each with an unchecked checkbox in the first column and the role name in the second column. The roles listed are: Approver - Full, Approver - Typical, Approver - View, Arranger - Full, Arranger - Typical, Arranger - View, Assessor - Full, Assessor - Typical, Assessor - View, Data Manager - Full, Data Manager - Typical, Deposit Manager - Full, Deposit Manager - Typical, Editor - Full, Editor - Typical, and Editor - View.

	Description
<input type="checkbox"/>	Approver - Full
<input type="checkbox"/>	Approver - Typical
<input type="checkbox"/>	Approver - View
<input type="checkbox"/>	Arranger - Full
<input type="checkbox"/>	Arranger - Typical
<input type="checkbox"/>	Arranger - View
<input type="checkbox"/>	Assessor - Full
<input type="checkbox"/>	Assessor - Typical
<input type="checkbox"/>	Assessor - View
<input type="checkbox"/>	Data Manager - Full
<input type="checkbox"/>	Data Manager - Typical
<input type="checkbox"/>	Deposit Manager - Full
<input type="checkbox"/>	Deposit Manager - Typical
<input type="checkbox"/>	Editor - Full
<input type="checkbox"/>	Editor - Typical
<input type="checkbox"/>	Editor - View

Figure 88: Add New Roles Page

- 3 Select the roles that you want to assign to the user.
- 4 Click **Add Roles**. The User Role Parameters page opens.

The screenshot displays the 'User Role Parameters Page' with the following sections:

- User Details:**
  - User ID: 51962
  - User Name: John Doe
  - Role Name: Approver - Full
  - Created on: 07/12/2017
  - Updated on: 07/12/2017
  - Created by: Ex Libris
  - Updated by: Ex Libris
- Role Information:**
  - Scope: Demo Institution
  - Status: Active (dropdown menu)
  - Expiry Date: dd/MM/yyyy (calendar icon)
  - Status Date: (empty field)
  - Notes: (empty text area)
- Role Parameters:**
  - \* Approval Group:  Un-published Approver
  - Internal Approver

Figure 89: User Role Parameters Page

- In the **User Role Information** pane, complete the fields as described in the following table:

Table 23. User Role Page Fields

Field	Description
Scope	The consortium, institution, or department to which the user belongs and to which the user’s actions apply. The user role is relevant only to this scope.
Status	The status of the user. The following options are available: <ul style="list-style-type: none"> <li>■ <b>New</b> - A new Producer Agent who has recently registered in the Rosetta system, but is not yet approved by a Negotiator</li> <li>■ <b>Active</b> - A user account that is enabled and can be used</li> <li>■ <b>Inactive</b> - A user account that is disabled and cannot be used</li> </ul>
Expiry Date	The date on which the user role must expire, if applicable.
Note	Comments that an Administrator can write about the user role.

- 6 In the **User Role Parameters** pane, select all the parameters that apply to the user.
- 7 Click **Save**. The User Details page opens. The user role is assigned to the user.
- 8 Repeat steps 1–7 to add additional roles, if necessary.
- 9 Click **Save**.

The user can now work with the Rosetta system as defined by the user roles.

## Updating a User Role

Administrators can update an existing user role.

To update a user role:

- 1 On the User List page (see [Managing Users](#) on page 149), locate the user to whom you want to assign a role, and click **Update**. The User Details page opens.

The screenshot displays the 'User Details' page for a user with ID 61421. The page is divided into several sections:

- User Information:** Fields for User Name (amy1), First Name (Amy), Last Name (Lee), Job Title (user), User Group, Status (Active), Telephone 1 (630-555-2389), Email (amy1@usercentral.com), Website URL, Street (1323 Appleway Lane), Suburb, City, Country (United States), and Postcode. There are also fields for Language (English), Middle Name, Expiry Date, Status Date (01/02/2010), and Telephone 2.
- User Information (Type):** Radio buttons for selecting user type: External, Internal with External Authentication, and Internal (selected).
- Password:** Fields for Password and Verify Password, both masked with asterisks.
- User Roles:** A table showing assigned roles.

Active	Role	Details	Scope	Status	Date	Update	Delete
1	✓ Negotiator - Full	Internal	Demo Institution	01/02/2010 23:12:53			

Figure 90: User Details Page

- 2 In the **User Roles** pane, locate the user role you want to update and click **Update**. The User Role Parameters page opens.

Home / Data Management: Manage Users / Details

User ID	51962	Created on	07/12/2017	Created by	Ex Libris
User Name	John Doe	Updated on	07/12/2017	Updated by	Ex Libris
Role Name	Approver - Full				

**Role Information**

Scope: Demo Institution

Status: Active Status Date

Expiry Date: dd/MM/yyyy 📅

Notes:

**Role Parameters**

\* Approval Group  Un-published Approver

Figure 91: User Role Parameters Page

- 3 Modify the fields that you want to update.
- 4 Click **Save**. The User Details page is re-displayed.
- 5 Repeat steps 1 - 4 for additional user roles, if necessary.

The user can now work with the Rosetta system as defined in the updated user role.

## Activating and Deactivating a User Role

Administrators can deactivate a user role when they need to finish configuring the user role parameters, or if they want to temporarily disable the role without deleting it. Administrators can activate an inactive user role at any time.

When a user role is deactivated, the user no longer has this role privilege in the Rosetta system. For example, deactivating a Negotiator role means that the user can no longer perform Negotiator functions. Conversely, activating a user role grants the user this role privilege in the Rosetta system.

On the User Details page, the status of the user role is indicated by the check mark in the **Active** column:

- Yellow = active.
- Grey = inactive.

#### To activate or deactivate a user role:

- 1 On the User List page (see [Managing Users](#) on page 149), locate the user with which you want to work and click **Update**. The User Details page opens.
- 2 In the **User Roles** pane, locate the user role you want to activate or deactivate.
- 3 In the **Active** column, click the check mark. The check mark in the **Active** column indicates the new status. The user role status is changed from active to inactive, or from inactive to active.
- 4 Click **Save**.

The user can now work with the Rosetta system as defined by the active user roles assigned to this user.

## Deleting a User Role

Administrators can delete an existing user role. After a user role is deleted, the user no longer has this role privilege in the Rosetta system. For example, deleting a Negotiator role means that the user can no longer perform Negotiator functions.

#### To delete a user role:

- 1 On the User Details page (see [Managing Users](#) on page 149), in the **User Roles** pane, locate the user role you want to delete and click **Delete**. The confirmation page opens.
- 2 Click **OK**. The User Details page is re-displayed.
- 3 Click **Save**.

The user can no longer perform the actions that were defined in the deleted user role.

## Configuring Automatic E-mails to Users

System Administrators can configure e-mail notifications to be sent to Producers or Producer Agents when two types of changes occur:

- [E-mail Notifications for Change in User Status](#) on page 165 and
- [E-mail Notifications for Deposit Activity](#) on page 77.

## E-mail Notifications for Change in User Status

This is the e-mail that Rosetta system users receive when changes in a user's status occur (for example, changing a user role or assigning a Producer Agent to a Producer).

### NOTE:

Currently, notifications are only sent when a Producer Agent is created or a user role is changed.

System Administrators define the text and style of these notifications by configuring XSL files.

### To configure e-mail notifications:

- 1 On the Advanced Configuration page, click **General**. The General page opens.
- 2 Click **Configuration Files**. The Configuration Files page opens.
- 3 In the **File Group** drop-down list, select **Deposit Configuration**.
- 4 In the **File Subgroup** drop-down list, select **E-mail Formatting**. The list of configuration files is filtered, and the XSL files that define notifications text and look-and-feel are displayed.

The screenshot shows a web interface for configuring files. At the top, there is a breadcrumb trail: Home > Advanced Configuration > General > Configuration Files. Below this, there are two dropdown menus: 'File Group: Deposit Configuration' and 'Sub-Group: Email Formatting'. The main content area displays a table of 10 files, with a '1 - 10 of 10 Files' indicator. The table has columns for 'Filename', 'Description', 'Updated by', and 'Update Date'. Each row includes 'View' and 'Edit' links. A 'Back' button is located at the bottom left of the table area.

Filename	Description	Updated by	Update Date
1 ../xsl/deposit_activity_status_change/email.xsl	com.exlibisrepository_emailToDepositor		11/17/09
2 ../xsl/deposit_activity_status_change/email_body.xsl	com.exlibisrepository_emailToDepositorBody		11/17/09
3 ../xsl/emails/EmailAddingRepresentation.xsl	com.exlibis.infra_emailAddingRepresentation		11/17/09
4 ../xsl/emails/EmailIndividualProducerRegister.xsl	com.exlibis.infra_emailToUserNewIndividualPro		11/17/09
5 ../xsl/emails/EmailProducerReport.xsl	com.exlibisrepository_emailReportToProducer		11/17/09
6 ../xsl/emails/EmailUserDelete.xsl	com.exlibis.infra_emailToUser		11/17/09
7 ../xsl/emails/EmailUserNew.xsl	com.exlibis.infra_emailToUser		11/17/09
8 ../xsl/emails/EmailUserNewPasswordIndPro.xsl	com.exlibis.infra_emailToUserNewPasswordInd		11/17/09
9 ../xsl/emails/EmailUserRegister.xsl	com.exlibis.infra_emailToUser		11/17/09
10 ../xsl/emails/EmailUserUpdate.xsl	com.exlibis.infra_emailToUser		11/17/09

Figure 92: E-Mail Notification Configuration Files

- 5 Locate the notification you want to configure and click **Edit**.

The Edit Configuration File opens. The XSL for the file displays in an editable pane.



Figure 93: Edit Configuration File Page

**6** Modify the file as required and click **Save**.

The Rosetta system now sends e-mail notifications as defined in the updated XSL file.

## Defining User Mandatory Fields

A System Administrator can designate mandatory fields for user records. These designations are relevant for all users stored in Rosetta, regardless of their authentication by the PDS. Both external users (authenticated in the LDAP, for example) and internal users (authenticated by Rosetta) are required to enter values in the designated mandatory fields.

Administrators define mandatory fields during advanced configuration using code tables, as described in the following table.

Table 24. User Mandatory Field Code Tables

User Category	Code Table
Producers	Organization Users
Producer Agents and Staff Users	Users

Administrators can access each of these code tables from the Users page.

Administrators work with the user mandatory fields code tables as described in **Working with Code Tables** on page 234.

## User Authentication with SAML

SAML enables Rosetta to exchange authentication and authorization information, allowing a user to sign in or out of an external system and be automatically signed in or out of Rosetta, or vice versa. Rosetta supports the SAML 2.0 Web Browser SSO profile.

For a more information concerning SAML-based SSO for Rosetta, see <https://developers.exlibrisgroup.com/rosetta/integrations/saml>

To configure the SAML authentication profile:

- 1 From the Rosetta Administration module, click **Users > Authentication Profiles > Add Authentication Profile**. The following page is displayed:

The screenshot shows the 'Add Authentication Profile' form. The 'General Information' section contains the following fields: 'Created Date' (05/07/2017), 'Created By' (John Smith), 'Updated Date' (05/07/2017), 'Updated By' (John Smith), '\* Name' (text input), 'Description' (text area), and 'Type' (SAML). The 'Authentication Profile Details' section contains: 'Metadata File Upload Method' (radio buttons for HTTP and File), 'URL' (text input) with a 'Populate Profile' button, '\* IdP issuer' (text input), '\* IdP login URL' (text input), '\* IdP logout URL' (text input), 'User ID location' (NameID dropdown), 'User Group location' (Attribute dropdown) with an 'Attribute Name' field, 'Certificate upload method' (Free Text dropdown), 'ADFS' (checkbox), and 'Rosetta Certificate Version' (Signed certificate | Expiration date: 05 January 2021) with a 'Generate Metadata File' button. At the bottom are 'Cancel' and 'Save' buttons.

Figure 94: Authentication Profile Details

- 2 Enter a name and description for the profile.
- 3 You can populate the profile information from metadata. To use a metadata link, select **HTTP** and provide the location of the link in the URL field. To use a metadata upload, select **File** and select the file. For more information about this file, see <https://developers.exlibrisgroup.com/rosetta/integrations/saml>.
- 4 Click **Populate Profile** to populate the profile information.
- 5 If you do not populate the profile from metadata, enter the settings for the **IdP issuer**, **IdP Login URL**, **IDP Logout URL**, and **User ID Location**.

- 6 For **User Group Location**, select **Attribute** and for **Attribute Name**, enter the name of the attribute in the SAML XML file that contains the user group list.
- 7 In Certificate upload method, select the type of certificate to upload. Alma accepts certificate file uploads and free-text certificate entry. If you select **Free Text**, enter the text of the certificate. If you select **File**, select the file.
- 8 Select **ADFS** if the IdP enables Active Directory Federation Services.
- 9 Select the Rosetta certificate version that you want to use, and click **Generate Metadata File** to generate the Rosetta metadata file that you are required to provide to the IdP.
- 10 Click **Save**.



# 10

---

## Plug-in Management

This section contains:

- **Archive Decomposer** on page 172
- **Technical Metadata Extractor** on page 175
- **Risk Extractor** on page 178
- **Migration Tool** on page 180
- **Repository Task** on page 181
- **Field Validator** on page 182
- **Persistent Identifier Generator Plugin** on page 185
- **Persistent Identifier (PI) Generator (Deprecated)** on page 186
- **Converter (Publishing)** on page 188
- **Publisher (Publishing)** on page 189
- **Start-up Check** on page 191
- **Access Rights** on page 192
- **Custom Fixity** on page 193
- **Format Identifier** on page 195
- **Virus Check** on page 198
- **Viewer Pre-Processor Plug-in** on page 200
- **Storage Plug-in** on page 200
- **File Comparison Plug-in** on page 201

As part of the Rosetta open platform approach, and to allow customers to apply their own logic and tools to Rosetta, a mechanism for installing and using plug-ins has been implemented in Rosetta. This mechanism is available through the Administrative interface.

This chapter will cover the supported plug-in types from functional and implementation perspectives. It will not cover technical aspects of the plug-in

framework. For technical information, see the Plug-in Guide documentation in the Developer's Network

(<https://developers.exlibrisgroup.com/rosetta/integrations/plugins>).

## Archive Decomposer

The Decomposer represents the plug-in family of all classes/programs of varied packed/compressed files that handle a decomposition.

The decompression of containers is invoked from two areas of the system:

- 1 Web Deposit – according to the material flow definition, the container (e.g. zip file) is decomposed into the inner files using the plug-in. In this case, the container is disregarded and only the inner files are ingested into Rosetta as they were in the original streams.
- 2 Validation Stack – according to decomposition rules, a container (e.g. multi-page TIFFs) is decomposed into bitStreams (retained only in the operational DB). These inner files, the bitStreams, also pass through the ValidationStack (that is, identification, tech-md-extraction, risk-extraction) and participate in the risk report.

### Plug-in Parameters

The Archive Decomposer requires two parameters:

- Full file name (including full path) – full name of the container input file
- Directory name - where the inner files will be extracted to

### Usage

Once installed, the Archive Decomposer can be used as the decomposing tool in the following decomposition rules setup.

#### *Decompose at the Time of Loading*

Rosetta can decompose a compound file while loading it onto the deposit server so that only the inner files are loaded while the original compound file is not. The tool used for decomposing the compound file is one of the installed Archive Decomposer plug-ins, which is accessible in the Automatic Decomposition Rules rule editor.

Home > Advanced Configuration > Deposit > Automatic Decomposition Rules > Rule Details

**Rule Editor**

Name: Decomposition Rule

Description:

Created By: System      Created on: 25/05/2012 21:07:51

Updated By:      Last Update on:

**Input General Parameters**

Parameter	Operator	Value
File Extension *	=	* zip

**Output Parameters:**

Parameter	Result
Extractor Plugin Name *	Unzip with encoding

Cancel      Save

Figure 95: Decomposition Rule

### ***ByteStream Extraction***

Another use of the Archive Decomposer plug-in is the ByteStream extraction. This mechanism allows Rosetta to extract and store technical MD (needed for preservation) of each of the inner files. The tool to be used for decomposing the compound file is one of the installed Archive Decomposer plug-ins which will be accessible in the Rules for Bytestream MD Extraction rule editor.

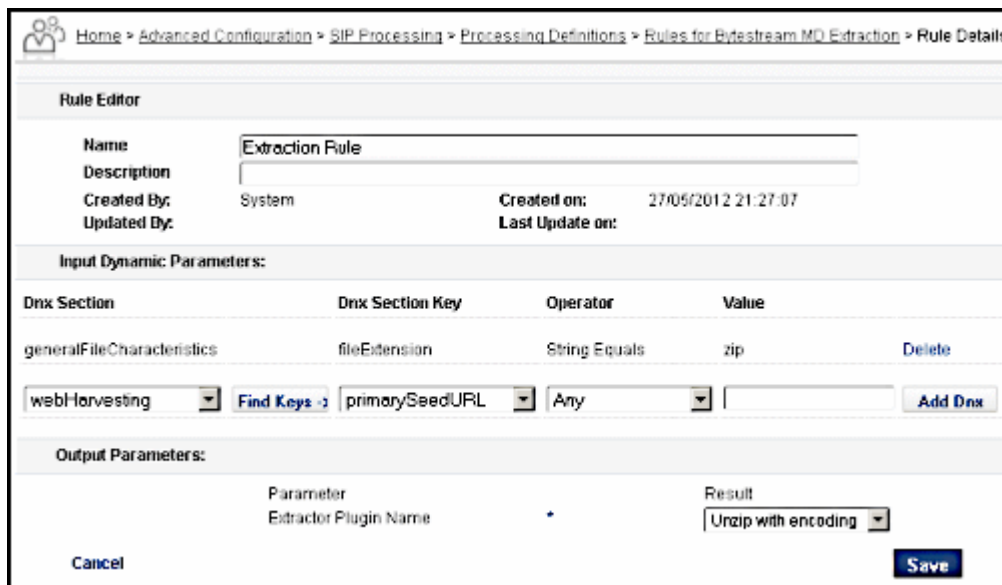


Figure 96: Bytestream Metadata Extraction Rule - Details

### Implementations

Rosetta includes three implementations of the Archive Decomposer plug-in:

- decomposerArcFile – A script plug-in to decompose ARC files
- Unzip – A script plug-in to decompose ZIP files
- Unzip With Encoding – A script plug-in to decompose ZIP files that require special encoding for the inner files

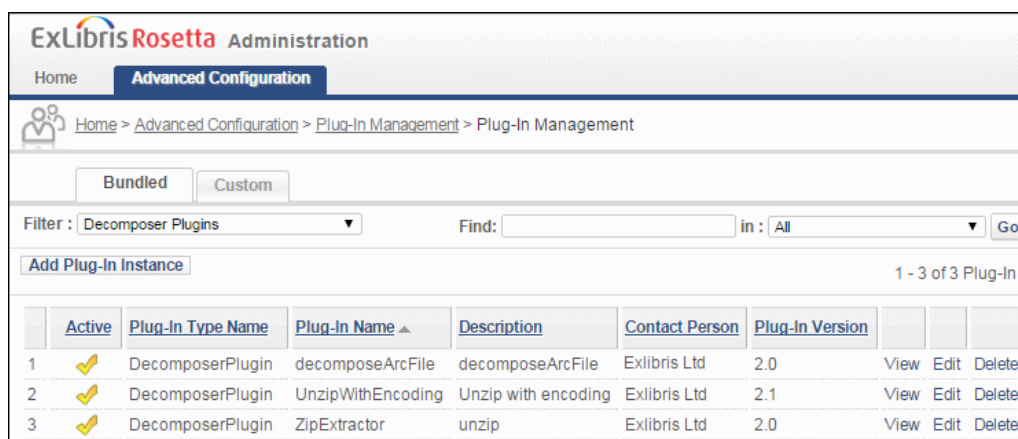


Figure 97: Decomposer Plug-in Management

## Technical Metadata Extractor

The Technical Metadata Extractor (MD Extractor) represents the family of utilities that extracts the technical properties (such as size, encoding, compression) of a file. Each extractor is responsible for handling a specific file format. However, the sharing of generic extractors is possible.

The extractor plug-in exposes all the properties it can extract, and Rosetta uses this information to extract property values of a given file. The system saves the property values to the DNX, updating two sections, `significantProperties` and `fileValidation`. While the `significantProperties` section holds more standard technical properties (such as from exif, XDP), the `fileValidation` section holds more general information such as well-formedness, validity, and associated mime type.

---

**NOTE:**

The extractor must be associated with a format in the format library in order to run.

---

### Plug-in Parameters

Depending on the specific implementation, a plug-in may or may not require parameters. If the plug-in does require parameters, they are populated during installation of a new instance of the plug-in.

### Usage

The association of an MD extractor to a format is done at the format level (format library). For an MD extractor to be available at the format level, it should be assigned to the same Classification Group that the format is assigned to.

Active	Plug-In Type Name	Plug-In Name	Description	Contact Person	Plug-In Version			
1	MDExtractorPlugin	AIFF-hul-1.10	AIFFHULMDEtractorPlugin	Exlibris Ltd	3.0	View	Edit	Delete
2	MDExtractorPlugin	ASCII-hul-1.10	ASCIHULMDEtractorPlugin	Exlibris Ltd	3.0	View	Edit	Delete
3	MDExtractorPlugin	BYTESTREAM-hul-1.10	BYTESTREAMHULMDEtractor	Exlibris Ltd	3.0	View	Edit	Delete
4	MDExtractorPlugin	GIF-hul-1.10	GIFHULMDEtractorPlugin	Exlibris Ltd	3.0	View	Edit	Delete
5	MDExtractorPlugin	HTML-hul-1.10	HTMLHULMDEtractorPlugin	Exlibris Ltd	3.0	View	Edit	Delete
6	MDExtractorPlugin	JPEG-hul-1.10	JPEGHULMDEtractorPlugin	Exlibris Ltd	3.0	View	Edit	Delete
7	MDExtractorPlugin	JPEG2000-hul-1.10	JPEG2000HULMDEtractorPlugin	Exlibris Ltd	3.0	View	Edit	Delete
8	MDExtractorPlugin	nz.govt.natlib.adapter.arc.ArcAdapter	ArcExtractorPlugin	National Library New Zealand	4.0	View	Edit	Delete
9	MDExtractorPlugin	nz.govt.natlib.adapter.arc.WarcAdapter	WarcExtractorPlugin	National Library New Zealand	1.0	View	Edit	Delete
10	MDExtractorPlugin	nz.govt.natlib.adapter.bmp.BitmapAdapter	BitmapExtractorPlugin	Exlibris Ltd	3.0	View	Edit	Delete

Figure 98: MD Extractor Plug-In Management

After the MD extractor is assigned to a classification, it is listed in the Related MD extractors folder of that classification group.

Name	Audio (AES)	Created on	Updated on
Description For all uncompr...		06/10/2009	03/12/2009
		Created by PMcKinney	Updated by Ex Libris

MD Extraction Tool	Description
1 AIFF-hul	AIFFHULMDEtractorPlugin
2 WAVE-hul	WaveHULMDEtractorPlugin
3 nz.govt.natlib.adapter.wav.WaveAdapter	WaveExtractorPlugin

Figure 99: Metadata Extractor Tools

The same list of MD extractors will be also available in the MD extractor drop-down at the format level for all formats belonging to the same classification.

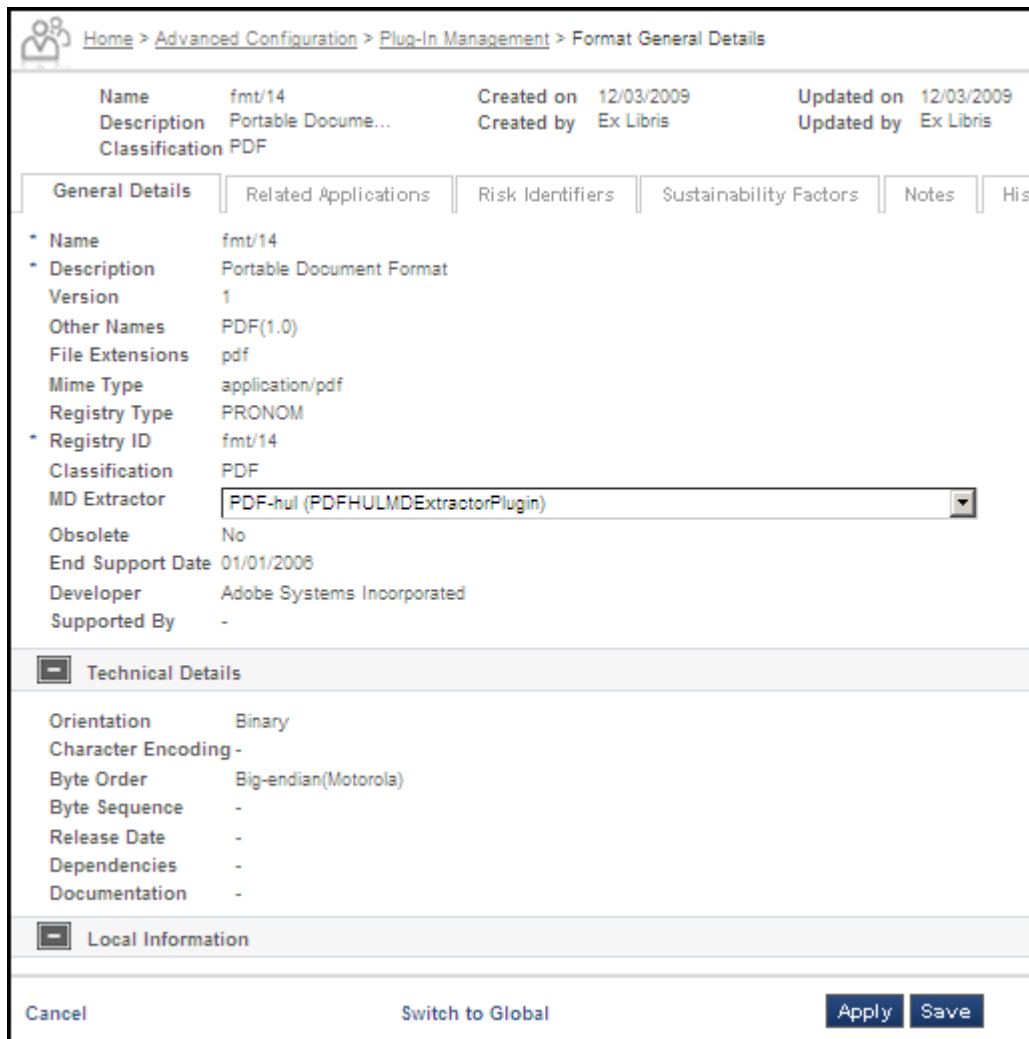


Figure 100: Metadata Extractor Drop-down Menu

## Implementations

Rosetta includes the following implementations of the MD Extractor plug-in:

- JHOVE
  - BYTESTREAM-hul
  - ASCII-hul
  - AIFF-hul
  - HTML-hul
  - JPEG2000-hul
  - PDF-hul

- JPEG-hul
- GIF-hul
- TIFF-hul
- UTF8-hul
- WAVE-hul
- XML-hul
- NLNZ extraction tool
  - nz.govt.natlib.adapter.flac.FlacAdapter
  - nz.govt.natlib.adapter.bmp.BitmapAdapter
  - nz.govt.natlib.adapter.mp3.MP3Adapter
  - nz.govt.natlib.adapter.arc.ArcAdapter
  - nz.govt.natlib.adapter.wav.WaveAdapter
  - nz.govt.natlib.adapter.pdf.PDFAdapter
  - nz.govt.natlib.adapter.jpg.JpgAdapter
  - nz.govt.natlib.adapter.openoffice.OpenOfficeAdapter
  - nz.govt.natlib.adapter.pdfbox.PDFBoxAdapter
  - nz.govt.natlib.adapter.any.DefaultAdapter
  - nz.govt.natlib.adapter.works.DocAdapter
  - nz.govt.natlib.adapter.excel.ExcelAdapter
  - nz.govt.natlib.adapter.gif.GIFAdapter
  - nz.govt.natlib.adapter.html.HTMLAdapter
  - nz.govt.natlib.adapter.powerpoint.PowerPointAdapter
  - nz.govt.natlib.adapter.tiff.TIFFAdapter
  - nz.govt.natlib.adapter.word.WordAdapter
  - nz.govt.natlib.adapter.wordperfect.WPAdapter
  - nz.govt.natlib.adapter.xml.XMLAdapter3
  - nz.govt.natlib.adapter.xml.XMLAdapter

## Risk Extractor

The Risk analysis is one of the tasks running as part of the VS (Validation Stack) for every file uploaded to Rosetta. The Risk analysis task uses the Risk Extractor

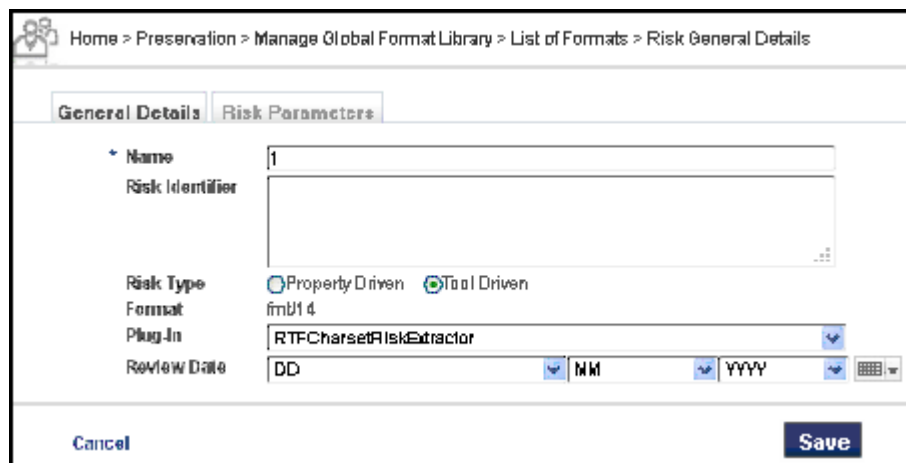
plug-in for that purpose. The association of a certain risk to a certain Risk Extractor is done in the global format library.

## Plug-in Parameters

Depending on the specific implementation, a plug-in may or may not require parameters. If the plug-in does require parameters, they are populated on the Risk Identifier Parameters page in the Global format library.

## Usage

A list of the implemented Risk Extractor plug-ins is available on the Risk General Details page of the Global format library.



The screenshot shows a web-based configuration interface for a Risk Extractor. The breadcrumb trail at the top reads: Home > Preservation > Manage Global Format Library > List of Formats > Risk General Details. The interface has two tabs: 'General Details' (selected) and 'Risk Parameters'. Under 'General Details', there are several fields: 'Name' with the value '1', 'Risk Identifier' (empty), 'Risk Type' with radio buttons for 'Property Driven' (selected) and 'Tool Driven', 'Format' with the value 'rftB14', 'Plug-In' with the value 'RTFCharsetRiskExtractor', and 'Review Date' with the value 'DD' and a calendar icon. At the bottom, there are 'Cancel' and 'Save' buttons.

Figure 101: Risk Extractor Details

## Implementations

Rosetta includes two implementations of the Risk Extractor plug-in:

- RTFCharsetRiskExtractor – A JAVA plug-in being able to identify a rotten bit in a RTF file's header
- RTFControlwordRiskExtractor – An additional JAVA plug-in being able to identify the same rotten bit in a RTF file's header

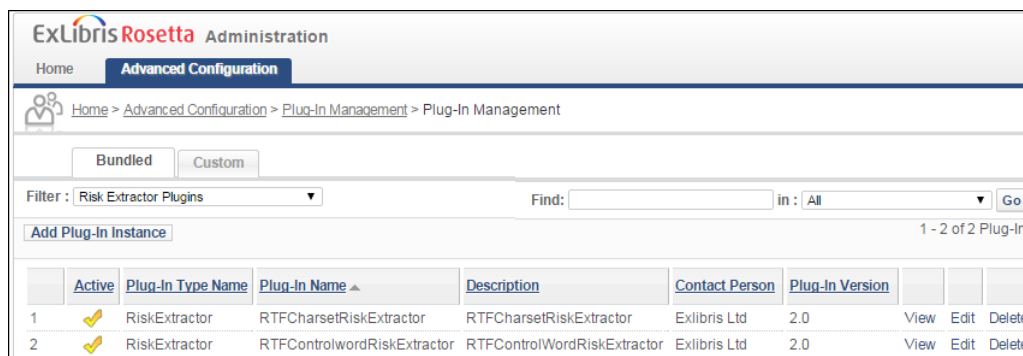


Figure 102: Risk Extractor Plug-in Management

## Migration Tool

The Migration Tool represents the plug-in family of all classes or programs that handle a transformation or correction of a stream. The transformation can output a new file from the same format or from one format to another one (e.g., TIFF to J2K).

### Plug-in parameters

Depending on the specific implementation, some of the plug-ins may require parameters and some not. If the plug-in does require parameters, those will be populated on step 2 of the Add Alternative wizard (preservation plan).

### Usage

A list of the implemented Migration Tool plug-ins are available on step 1 of the Add Alternative wizard (preservation plan).

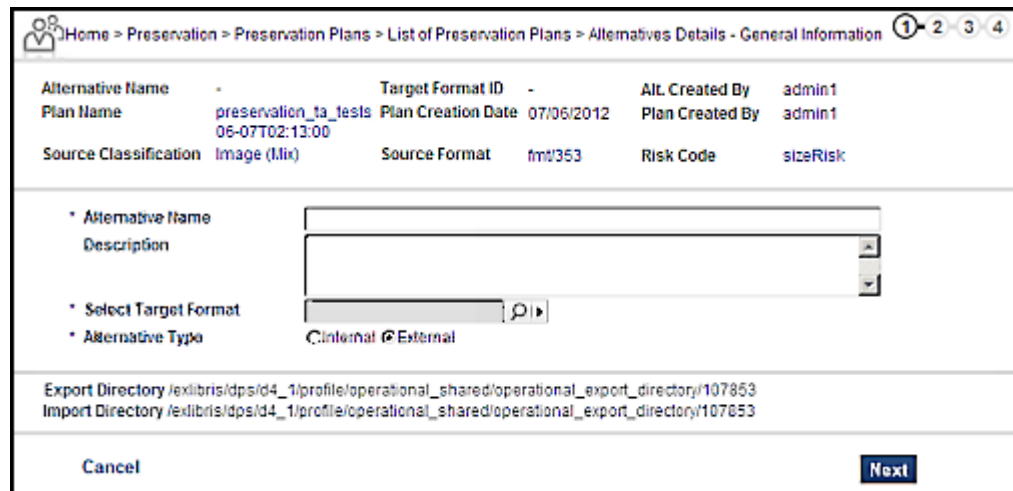


Figure 103: Add Alternative Wizard - Step 1

## Implementations

Rosetta includes four implementations of the Media Converter plug-in:

- MP3toWaveMigrationTool – A script plug-in to convert MP3 files to WAV
- RtfMigrationTool - A script plug-in to correct the rotten bit in RTF files
- tiff\_2\_jp2\_lzw\_compression - A script plug-in to convert TIFF files to JP2 (JPEG2000)
- tiff\_2\_tiff\_lzw\_compression - A script plug-in to convert TIFF files to TIFF

## Repository Task

The Repository Task plug-in is used to edit a DC or a DNX element for objects in the permanent repository. Whenever a massive update of such elements is required, an implementation of the Repository Task plug-in is automatically converted by the system to a Rosetta task. The task is called by the process automation framework to schedule a process that performs the required update across all relevant IEs.

To delete a repository task, disassociate it from any task chains and delete its plug-in from the plug-in interface.

## Plug-in Parameters

Plug-in parameters are set while installing a new instance of the plug-in. The specific parameters available are determined on what is available in the plug-in. The following parameters are available for all plug-ins:

- Task Name
- Task Description

## Usage

A list of the implemented Repository Task plug-ins will be available as tasks in the Task Chain edit page.

## Implementations

Rosetta includes a single implementation of the Repository Task plug-in:

- DCReplacePlugin – A JAVA plug-in to update DC tags

## Field Validator

The Field Validator plug-in is used to validate descriptive metadata according to the metadata profile setup. It uses regular expression syntax to define the pattern to be validated.

## Plug-in Parameters

Plug-in parameters are set while installing a new instance of the plug-in and include the following:

- Regular Expression – Mandatory free text parameter to type the regular expression pattern to be validated

**ExLibris Rosetta Administration**

Home **Advanced Configuration**

Home > Advanced Configuration > Plug-In Management > Plug-In Information

**Plugin Information**

Plug-In Id	20338	Plug-In Name	EmailValidator
Plug-In Type Name	FieldValidatorPlugin	Implementation Type	JAVA
Implementation Name	com.exlibris.dps.repository.pl...	Interface	-
Owner	CRS00	Material Type	DIGITAL
Family Type	TASK	Description	Email Validator Plugin
Resource Type	-	Module	-
Status	ACTIVE	Plug-In Version	2.0
Public API	-		

**Contact Information**

Contact Type	admin	Email address	yaarac@exlibris.co.il
Last Name	Ltd	First Name	Exlibris
Address 1	Agodat Asport2 Building 9	City	Jerusalem
Telephone 1	(054)485-2328		

**Plugin Parameters**

\* Regular Expression

Cancel **Save**

Figure 104: Field Validator Plug-in Details

## Usage

A list of the implemented Field Validator plug-ins will be available as validation routines in the Metadata Form and Metadata Profile – DC Element Editor pages.

Home > Producers > Advanced Tools > Metadata Form > Metadata Form Details

Type: Generic    Created on: 06/06/2012    Created by: -  
Updated on: 06/06/2012    Updated by: admin1

Design Information    Fields Information

Select a field to view/edit:

Add New Field

1	<input type="checkbox"/>		Title	Delete
2	<input type="checkbox"/>	▲	Subject	Delete
3	<input type="checkbox"/>	▲	Creator	Delete
4	<input type="checkbox"/>	▲	Frequency	Delete
5	<input type="checkbox"/>	▲	URL	Delete
6	<input type="checkbox"/>	▲	ISBN	Delete
7	<input type="checkbox"/>	▲	ISSN	Delete
8	<input type="checkbox"/>	▲	Year	Delete
9	<input type="checkbox"/>	▲	Owner	Delete
10	<input type="checkbox"/>	▲	Notes	Delete

Delete Fields    Duplicate Field

Properties for: Title

\* Label: Title    \* Type: TextField

\* DC Tag: Title

\* Mandatory:  No  Yes    Validator: No Validator

Single Line:  No  Yes

Default Value: [ ]

Tooltip: Serial Title

\* Description: Title

Save Field

Cancel    Preview    Save Form

Figure 105: Metadata Form Details Page

## Implementations

Rosetta includes the following implementations of the Field Validator plug-in:

- EmailValidator – Regular expression to validate email template
- ISBNValidator – Regular expression to validate ISBN template
- ISMValidator – Regular expression to validate ISMN template
- ISSNValidator – Regular expression to validate ISSN template
- NumericValidator – Regular expression to validate numeric values
- PhoneValidator – Regular expression to validate phone template
- Regular\_Expression\_Validator\_Plugin – A generic regular expression plug-in
- URLValidator – Regular expression to validate URL template
- W3CDTFValidator – Regular expression to validate W3CDTF (W3C Date and Time Format) template

	Active	Plug-In Type Name	Plug-In Name	Description	Contact Person	Plug-In Version			
1	<input checked="" type="checkbox"/>	FieldValidatorPlugin	ChecksumDigitValidatorPlugin	RegexFieldValidator	Exlibris Ltd	3.0	View	Edit	Delete
2	<input checked="" type="checkbox"/>	FieldValidatorPlugin	EmailValidator	Email Validator Plugin	Exlibris Ltd	2.0	View	Edit	Delete
3	<input checked="" type="checkbox"/>	FieldValidatorPlugin	ISBNValidator	ISBN Validator Plugin	Exlibris Ltd	3.0	View	Edit	Delete
4	<input checked="" type="checkbox"/>	FieldValidatorPlugin	ISMNValidator	ISMN Validator Plugin	Exlibris Ltd	3.0	View	Edit	Delete
5	<input checked="" type="checkbox"/>	FieldValidatorPlugin	ISSNValidator	ISSN Validator Plugin	Exlibris Ltd	3.0	View	Edit	Delete
6	<input checked="" type="checkbox"/>	FieldValidatorPlugin	NumericValidator	Numeric Validator Plugin	Exlibris Ltd	2.0	View	Edit	Delete
7	<input checked="" type="checkbox"/>	FieldValidatorPlugin	PhoneValidator	Phone Validator Plugin	Exlibris Ltd	2.0	View	Edit	Delete
8	<input checked="" type="checkbox"/>	FieldValidatorPlugin	Regular_Expression_Validator_Plugin	RegexFieldValidator	Exlibris Ltd	2.0	View	Edit	Delete
9	<input checked="" type="checkbox"/>	FieldValidatorPlugin	URLValidator	URL Validator Plugin	Exlibris Ltd	2.0	View	Edit	Delete
10	<input checked="" type="checkbox"/>	FieldValidatorPlugin	W3CDTFValidator	W3CDTF Validator Plugin	Exlibris Ltd	2.0	View	Edit	Delete

Figure 106: Field Validator Plug-in List

The Field Validator plug-in can be used to validate descriptive metadata according to the relevant metadata profile setup. It uses regular expression syntax to define the pattern to be validated.

There is currently one out-of-the-box implementation, `RegexFieldValidatorPlugin`, for the Field Validator plug-in. `RegexFieldValidatorPlugin` receives `regex` as a parameter and uses it to validate a field during runtime.

This implementation enables customers to create different plug-in instances using custom regular expressions, without having to write plug-in implementations themselves.

## Persistent Identifier Generator Plugin

The PI Generator Plugin allows you to use a customized tool for generating persistent identifiers to be used with a Handle server.

### Plug-in Parameters

The parameters for the PI Generator Plugin are set while installing a new instance of the plug-in and include the following:

- Task Level – IE, Representation, or File
- Sequence – a series of numbers. (See [Configuring Sequences](#) on page 115).
- Object Identifier Type – the type of object identifier for the PI

- Check for Duplicates – select if you want Rosetta to skip identifiers that already exist
- Overwrite on Existing – select if you want Rosetta to overwrite existing duplicates

## Usage

PI Generator plugins create unique identifiers for a digital objects such as an image or an article. PIDs enable accessing this object as long as the object exists, even if it was moved to another location. PIDs work with Rosetta to enable persistent identification of an object across contexts.

## Implementation

Rosetta includes the following implementations of the Persistent Identifier plug-in:

- Handle Generator – Used for creating handle persistent identifiers
- URN Generator – Used for setting the prefix for a URN ID created in Rosetta

## Persistent Identifier (PI) Generator (Deprecated)

The Persistent Identifier plug-in allows you to use a customized tool for generating persistent identifiers.

## Plug-in Parameters

Depending on the specific implementation, a plug-in may or may not require parameters. If the plug-in does require parameters, they are populated during installation of a new instance of the plug-in.

## Usage

A list of the implemented Persistent Identifier plug-ins is available on the Persistent Identifier Task Parameters page.

The screenshot shows a web-based configuration interface for a task chain. At the top, there is a breadcrumb trail: Home > Advanced Configuration > Repository > List of Task Chains > Task Chain Details. Below this, the task chain's metadata is displayed: ID: 15, Created By: SYSTEM, Created On: 06/06/2012 21:06:23, and Updated By: (blank), Updated On: (blank). The main section is titled 'General Information' and contains several fields: 'Name' is 'Create Persistent Identifier'; 'Description' is 'This task will generate an external unique Persistent Identifier for the Intellectual Entity using the Handle Network'; 'Status' is 'Active' (with a dropdown arrow); 'Status Date' is '06/06/2012'; 'Log Level' is 'Task' (with a dropdown arrow); and 'Log Sensitivity' is 'All' (with a dropdown arrow). Below these fields is a 'Groups:' section with a list of checkboxes: Workbench, Validation Stack, Webeditor - Staging (checked), Preservation, Move To Permanent, Maintenance (checked), Webeditor - Permanent, Metadata Validation, and Enrichment. At the bottom of the form, there are two tabs: 'Task List' and 'Task Parameters'. Under the 'Task Parameters' tab, three task entries are listed, each with a minus sign icon and the text 'No Parameters': 'PiGeneratorTask - Pi Generator Task', 'PiPublisherTask - Pi Publisher Task', and 'Move To Permanent Task - Move To Permanent Task'. At the very bottom, there are 'Cancel' and 'Save' buttons.

Figure 107: Persistent Identifier Plug-in Parameters

## Implementations

Rosetta includes the following implementations of the Persistent Identifier plug-in:

- CMS Generator – Used for setting the prefix for a CMS ID created in Rosetta
- URN Generator – Used for setting the prefix for a URN ID created in Rosetta

## Converter (Publishing)

A converter plug-in converts a published Rosetta IE to a certain format or schemathat is part of the Publishing configuration.

### Plug-in Parameters

Depending on the specific implementation, a plug-in may or may not require parameters. If the plug-in does require parameters, they are populated during installation of a new instance of the plug-in.

### Usage

A list of the implemented Converter plug-ins is available as a converter type in the Add Publishing Profile wizard, step 1.

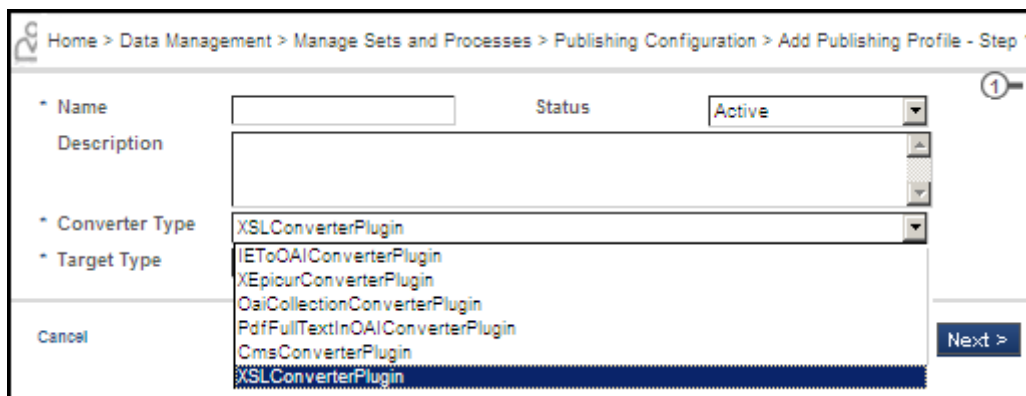
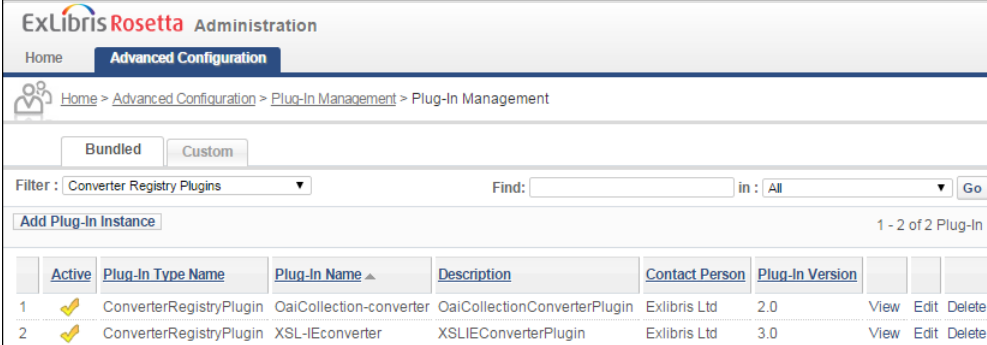


Figure 108: Converter Types in Publishing Profile

### Implementations

Rosetta includes the following implementations of the Converter plug-in:

- IEToOAI-converter – Converts the descriptive metadata from the Rosetta METS and transforms it to the OAI\_DC metadata format
- XSL-converter – Converts the descriptive metadata from the Rosetta METS and transforms it to an XML format, as configured using an XSLT file (input parameter).
- Handle Converter – Prepares the output for the Handle publishing file



The screenshot shows the ExLibris Rosetta Administration interface. The breadcrumb trail is Home > Advanced Configuration > Plug-In Management > Plug-In Management. There are tabs for 'Bundled' and 'Custom'. A filter dropdown is set to 'Converter Registry Plugins'. A search bar contains 'Find: ' and a dropdown is set to 'in: All'. Below the search bar is an 'Add Plug-In Instance' button and a pagination indicator '1 - 2 of 2 Plug-In'. A table lists two plug-in instances:

	Active	Plug-In Type Name	Plug-In Name	Description	Contact Person	Plug-In Version			
1	<input checked="" type="checkbox"/>	ConverterRegistryPlugin	OaiCollection-converter	OaiCollectionConverterPlugin	Exlibris Ltd	2.0			<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
2	<input checked="" type="checkbox"/>	ConverterRegistryPlugin	XSL-IEconverter	XSLIEConverterPlugin	Exlibris Ltd	3.0			<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

Figure 109: Converter Registry Plug-in List

## Publisher (Publishing)

The Publisher plug-in is used to set the physical location that stores the published IEs (part of the Publishing configuration).

### Plug-in Parameters

Depending on the specific implementation, a plug-in may or may not require parameters. If the plug-in does require parameters, they are populated during installation of a new instance of the plug-in.

The screenshot displays the 'ExLibris Rosetta Administration' interface. At the top, there are navigation tabs for 'Home' and 'Advanced Configuration'. Below this, a breadcrumb trail reads 'Home > Advanced Configuration > Plug-In Management > Plug-In Information'. The main content area is divided into three sections: 'Plugin Information', 'Contact Information', and 'Plugin Parameters'. The 'Plugin Information' section contains a table of fields with their values, including Plug-In Id (35771), Plug-In Name (NFS-Publisher), and Plug-In Version (2.0). The 'Contact Information' section contains a table with fields like Contact Type (admin), Last Name (Ltd), and Email address (shaib@exlibris.co.il). The 'Plugin Parameters' section has three input fields for Folder, Number Of Sub-directories, and File Extension. At the bottom, there are 'Cancel' and 'Save' buttons.

Plugin Information			
Plug-In Id	35771	Plug-In Name	NFS-Publisher
Plug-In Type Name	PublisherRegistryPlugin	Implementation Type	JAVA
Implementation Name	com.exlibris.dps.repository.pl...	Interface	-
Owner	CRS00	Material Type	DIGITAL
Family Type	TASK	Description	NFSPublisherPlugin
Resource Type	-	Module	-
Status	ACTIVE	Plug-In Version	2.0
Public API	-		

Contact Information			
Contact Type	admin	Email address	shaib@exlibris.co.il
Last Name	Ltd	First Name	Exlibris
Address 1	Agodat Asport2 Building 9	City	Jerusalem
Telephone 1	(050)746-1234		

Plugin Parameters	
* Folder	<input type="text"/>
* Number Of Sub-directories	<input type="text"/>
* File Extension	<input type="text"/>

Figure 110: Publisher Registry Plug-in Details

## Usage

A list of the implemented Publisher plug-ins will be available as Target type in the Add Publishing Profile wizard, step 1.

## Implementations

Rosetta includes the following implementations of the Publisher plug-in:

- NFS-Publisher – Used exclusively to publish IEs to Google
- OAI-Publisher – Target is the OAI-PMH database tables
- Handle Publisher – prepares the handle data for publishing

## Start-up Check

The start-up check plugin is used to check essential components needed for running Rosetta properly. Please refer to the *Rosetta System Administration Guide* for further details.

### Plug-in Parameters

Depending on the specific implementation, a plug-in may or may not require parameters. If the plug-in does require parameters, they are populated during installation of a new instance of the plug-in.

**ExLibris Rosetta Administration**

Home **Advanced Configuration**

Home > Advanced Configuration > Plug-In Management > Plug-In Information

**Plugin Information**

Plug-In Id	35762	Plug-In Name	StartUp-DBChecker
Plug-In Type Name	StartUpCheckPlugin	Implementation Type	SCRIPT
Implementation Name	bin\db	Interface	-
Owner	CRS00	Material Type	DIGITAL
Family Type	TASK	Description	DBChecker
Resource Type	-	Module	-
Status	ACTIVE	Plug-In Version	2.2
Public API	-		

**Contact Information**

Contact Type	admin	Email address	shaib@exlibris.co.il
Last Name	Ltd	First Name	Exlibris
Address 1	Agodat Asport2 Building 9	City	Jerusalem
Telephone 1	(050)746-1234		

**Plugin Parameters**

* Role	REP
* Severity	FATAL
* Type	DBChecker

Cancel Save

Figure 111: Plug-in Management, Start-up Checker

## Usage

All start-up check plug-in instances are activated by Rosetta during system startup. Any errors detected by any of the start-up check plug-in instances are displayed to the user during login.

## Implementations

Rosetta includes the following implementations of the start-up check plug-in:

- DBChecker
- DeliveryWSChecker
- DepositWSChecker
- PDSCheckPlugin
- PermanentWSChecker
- PluginsCheckerPlugin
- RepositoryWSChecker
- SharedFoldersAccessChecker
- SharedFoldersSpaceChecker
- StorageAccessChecker
- StorageSpaceChecker

## Access Rights

The Access Rights plug-in tool allows access rights checks to be performed outside of Rosetta. On checking the access rights, the plug-in returns a true or false value that controls whether an object can be viewed.

## Plug-in Parameters

Depending on the specific implementation, a plug-in may or may not require parameters. If the plug-in does require parameters, they are populated during installation of a new instance of the plug-in.

## Usage

The Access Rights plug-in is available as input criteria on the access rights configuration page.

MID	1118	Metadata Type	policy:accessrights	Description	Plugin AR - For DP8-556
Created by	admin1	Creation Date	24/04/2012 08:15:36		
Updated by	admin1	Update Date	24/04/2012 09:15:36		

Criteria: AR Plug-in  
Operator: equal  
Value 1: AR Plug-in instance 1

Cancel Save

Figure 112: Access Rights Plug-in Configuration

The plug-in relies on two properties:

- 1 Token – This should be concatenated to the delivery URL (created by the external system accessing Rosetta) and will be used by the plug-in.

Example:

```
http://rosetta.exlibrisgroup.com:1801/delivery/  
DeliveryManagerServlet?dps_pid=IE17978/delivery/  
DeliveryManagerServlet?dps_pid=IE17978&token=<token>
```

- 2 IP - The IP address is derived from the General Parameter `client_ip_header` (similar to any other IP-based access right functionality).

## Implementations

There are no implementations for the Access Rights plug-in.

## Custom Fixity

The Custom Fixity plug-in allows customers to run a fixity check in addition to the three fixity algorithms used by Rosetta (MD5, CRC32 and SHA-256).

## Plug-in Parameters

Depending on the specific implementation, a plug-in may or may not require parameters. If the plug-in does require parameters, they are populated during installation of a new instance of the plug-in.

## Usage

A list of the implemented Custom Fixity plug-ins is available as a drop-down list in the Custom Fixity task.

Home > Advanced Configuration > Repository > List of Task Chains > Task Chain Details

ID: 17      Created By: SYSTEM      Created On: 07/06/2012 21:00:01  
Updated By:      Updated On:

**General Information**

\* Name: Validation Stack - Fixity and  
\* Description: This task chain will perform a fixity check and a virus check of the files of the Intellectual Entity.  
\* Status: Active      Status Date: 07/06/2012  
\* Log Level: Task      \* Log Sensitivity: All

Groups:

- Validation Stack
- Webeditor - Staging
- Preservation
- Move To Permanent
- Maintenance
- Webeditor - Permanent
- Metadata Validation
- Enrichment

Task List    Task Parameters

**CHECKSUM TASK - CHECKSUM TASK**

No Parameters

**Virus Check - Virus Check**

1 Items selected    Remove all

Use General Parameter Script

Add all

- UVScan-Script
- Q3/VirusCheck-Fail
- W0/VirusCheck-Pass

Cancel      Save

Figure 113: Fixity Task Chain Details Page

## Implementations

There are no implementations of the Access Rights plug-in.

## Format Identifier

The Format Identifier plug-in is used in order to allow customers to use a customized tool for identifying the format of the deposited file.

### Plug-in Parameters

Depending on the specific implementation, a plug-in may or may not require parameters. If the plug-in does require parameters, they are populated during installation of a new instance of the plug-in.

Plugin Information			
Plug-In Id	41568	Plug-In Name	FFDroidIdentifier
Plug-In Type Name	FormatIdentificationPlugin	Implementation Type	JAVA
Implementation Name	com.exlibris.dps.repository.pl...	Interface	-
Owner	CRS00	Material Type	DIGITAL
Family Type	TASK	Description	DROID file format identifier
Resource Type	-	Module	-
Status	ACTIVE	Plug-In Version	81.0
Public API	-		
Contact Information			
Contact Type	admin	Email address	yuliar@exlibris.co.il
Last Name	Ltd	First Name	Exlibris
Address 1	Agodat Asport2 Building 9	City	Jerusalem
Telephone 1	(050)746-1234		
Plugin Parameters			
	* Maximum number of bytes to scan		65536
Cancel			Save

Figure 114: Format Identifier Plug-in Information Page

### Usage

A list of the implemented Format Identifier plug-ins is available on the Format Identification Task Parameters page.

The screenshot shows a web-based configuration interface for a 'Task Chain Details' page. The breadcrumb navigation is 'Home > Advanced Configuration > Repository > List of Task Chains > Task Chain Details'. The page displays metadata for a task chain: ID, Updated By, Created By, Updated On, Created On (07/06/2012 22:47:17), and Status Date (07/06/2012). The 'General Information' section includes fields for Name, Description, Status (set to 'Active'), Log Level (set to 'Task'), and Log Sensitivity (set to 'All'). A 'Groups' section lists several categories with checkboxes: Workbench, Validation Stack, Webeditor - Staging, Preservation, Move To Permanent, Maintenance, Webeditor - Permanent, Metadata Validation, and Enrichment. Below this are tabs for 'Task List' and 'Task Parameters'. The 'Task Parameters' tab is active, showing a 'Format Identification Method' dropdown menu set to 'FFDroidIdentifier'. At the bottom, there are 'Cancel' and 'Save' buttons.

Figure 115: Task Chain for Format Identifier Plug-in

A list of the implemented Format Identifier plug-ins is also available on the Format Auto Correction Rules page (see figure below).

Home > Submissions > Advanced Tools > Format identification auto correction rules > Rule Details

### Rule Editor

Name:   
 Description:   
 Created By: System      Created on: 07/06/2012 20:59:15  
 Updated By:      Last Update on:

### Input General Parameters

*Producer Name	<input type="text" value="Any"/>	<input type="text" value="0 items selected"/> <input type="button" value="Remove all"/> <input type="text" value=""/> <input type="button" value="Add all"/> Demo Internal Producer <input type="button" value="+"/> INDIVIDUAL Junit Producer <input type="button" value="+"/> INDIVIDUAL Junit Producer <input type="button" value="+"/>
*Format Name	<input type="text" value="List Equa"/>	<input type="text" value="9 items selected"/> <input type="button" value="Remove all"/> x-fmt/110 (Fixed Width Values Text File) <input type="button" value="▲"/> x-fmt/13 (Tab-Delimited Text File) <input type="button" value="▼"/> x-fmt/14 (Macintosh Text File) <input type="button" value="▼"/> <input type="text" value=""/> <input type="button" value="Add all"/> EXL-Fmt-10 (EXL-Fmt-10descSuffix) <input type="button" value="+"/> EXL-Fmt-11 (EXL-Fmt-11descSuffix) <input type="button" value="+"/> Exl_Fmt_12 (EXL-Fmt-12descSuffix) <input type="button" value="+"/>
*File Extension	<input type="text" value="Any"/>	<input type="text" value="0 items selected"/> <input type="button" value="Remove all"/> <input type="text" value=""/> <input type="button" value="Add all"/> 3gpp <input type="button" value="+"/> low <input type="button" value="+"/>
*Mime Type	<input type="text" value="Any"/>	<input type="text" value="0 items selected"/> <input type="button" value="Remove all"/> <input type="text" value=""/> <input type="button" value="Add all"/> application/finale <input type="button" value="+"/> application/fts <input type="button" value="+"/> application/laescript <input type="button" value="+"/>
*File Size(KB)	<input type="text" value="Any"/>	<input type="text"/>
*Create Date	<input type="text" value="Any"/>	DD <input type="text"/> MM <input type="text"/> YYYY <input type="text"/>
*Plugin Instance Name	<input type="text" value="Any"/>	FFDroidIdentifier <input type="text"/>
*Identification Method	<input type="text" value="Any"/>	extension <input type="text"/>

### Output Parameters:

\*Format Name:

Figure 116: Format Identification Auto-Correction Rules - Details

## Implementations

Rosetta includes an implementation of DROID 6.0 as a Format Identifier plug-in.

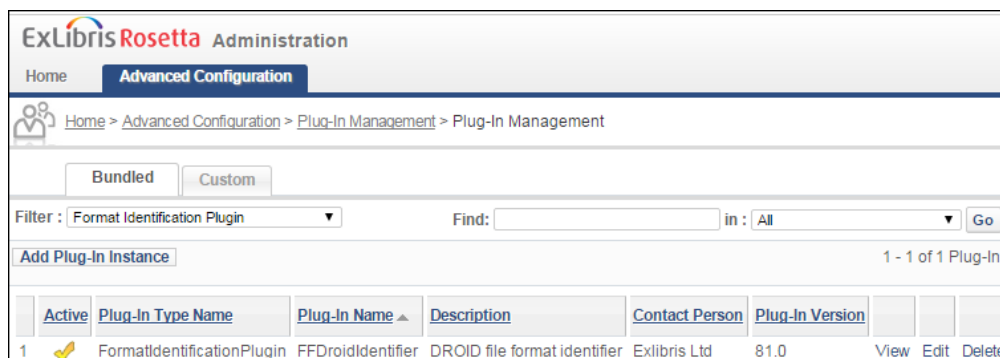


Figure 117: Identification Plug-in Management

## Virus Check

The Virus Check plug-in allows customers to use several customized virus check tools.

### Plug-in Parameters

Depending on the specific implementation, a plug-in may or may not require parameters. If the plug-in does require parameters, they are populated during installation of a new instance of the plug-in.

### Usage

A list of the implemented Virus Check plug-ins is available on the Virus Check Task Parameters page.

Home > Advanced Configuration > Repository > List of Task Chains > Task Chain Details

ID: 41316 Created By: admin1 Created On: 07/06/2012 21:19:14  
Updated By: John Smith Updated On: 07/06/2012 21:19:15

### General Information

\* Name: Validation Stack- Multiple Vi  
\* Description: Multiple Virus checks that all pass.  
\* Status: Active Status Date: 07/06/2012  
\* Log Level: Task Chain \* Log Sensitivity: Exception

Groups:

- Validation Stack
- Webeditor - Staging
- Preservation
- Move To Permanent
- Maintenance
- Webeditor - Permanent
- Metadata Validation
- Enrichment

Task List Task Parameters

#### CHECKSUM TASK - CHECKSUM TASK

No Parameters

#### Virus Check - Virus Check

2 Items selected [Remove all](#)

Use General Parameter Script	--
ISOVirusCheck-Pass	--
	<a href="#">Add all</a>
Q4aVirusCheck-Fail	+ ▲
J0KVirusCheck-Pass	+ ▲
Q3fVirusCheck-Fail	+ ▲

#### Format Identification Task - Format Identification Task

\* Format Identification Method: FFDroidIdentifier

#### TechMD extraction Task - TechMD extraction Task

No Parameters

#### File Format Risk Identification Task - File Format Risk Identification Task

No Parameters

Cancel [Save](#)

Figure 118: Virus Check Task Chain Details

## Implementations

Rosetta includes the following implementations of the Virus Check plug-in:

- Use General Parameter Script – Rosetta will keep supporting the virus check script that is currently stored as a general parameter named uvscan (for backwards compatibility purposes).
- Uvscan script – A dummy implementation of a virus check script plug-in

---

**NOTE:**

This is a placeholder only. Install and configure any anti-virus software separately.

---

## Viewer Pre-Processor Plug-in

A viewer pre-processor plug-in can be used in order to restructure an intellectual entity or convert a file prior to delivery to meet the requirements of a given viewer.

### Plug-in Parameters

Depending on the specific implementation, a plug-in may or may not require parameters. If the plug-in does require parameters, they are populated in the installation of a new instance of the plug-in.

### Usage

A viewer pre-processor plug-in can be used in order to restructure an intellectual entity or convert a file prior to delivery to meet the requirements of a given viewer. The list of available viewer pre-processor plug-ins is available directly from the viewer management UI.

## Storage Plug-in

Storage plug-ins provide the necessary interface between Rosetta and a storage layer, allowing Rosetta to store files on (and retrieve files from) various file systems and storage solutions.

### Plug-in Parameters

Depending on the specific implementation, a plug-in may or may not require parameters. If the plug-in does require parameters, they are populated in the storage configuration.

## Usage

Storage plug-ins provide the necessary interface between Rosetta and a storage layer, allowing Rosetta to store files on (and retrieve files from) various file systems and storage solutions. The list of available storage plug-ins is displayed in the storage management UI.

## File Comparison Plug-in

File comparison plug-ins receive two files and return a value that can be used as part of a preservation evaluation.

### Plug-in Parameters

Depending on the specific implementation, a plug-in may or may not require parameters. If the plug-in does require parameters, they are populated in the installation of a new instance of the plug-in.

## Usage

The plug-in receives two files (original and migrated) and returns a decimal value that can be used as part of a preservation evaluation. On failure it returns -1.



# 11

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## Digital Object Identifiers

This section includes:

- [Integrating Digital Object Identifiers](#) on page 203
- [Configuring DOI Generation \(Generic\)](#) on page 203
- [Configuring Handle Creation and Publishing](#) on page 218
- [Configuring NLB PID Creation and Publishing](#) on page 219

### Integrating Digital Object Identifiers

Rosetta supports the storing, generating, and publishing of Digital Object Identifiers (DOIs) in IEs. This allows external systems that store and resolve links to digital objects to store information about IEs in Rosetta.

Rosetta needs to be configured in order to integrate with the different systems that store the DOI values.

### Configuring DOI Generation (Generic)

The configuration of the DOI generation task includes the following steps:

- Installing an instance of the CMSGenerator plug-in.
- Adding the PiGeneratorGenericTask to an enrichment task chain.
- Selecting the enrichment task chain that includes the DOI generation task as part of the SIP processing configuration setup.
- Configuring the SIP routing rules in order to match the SIP processing configuration with the material flows.
- Creating a task chain for generating the DOI as a stand-alone task chain, to be run as a process on IEs that are already in the permanent repository. This task chain should use the PiGeneratorGenericTask task, and its parameter

should also be the plug-in instance that was created before (e.g. DOIGenerator).

## Creating an Instance of the CMSGenerator Plug-in

Use the Plug-in Manager UI to install an instance of the CMSGenerator plug-in. (The plug-in instance can be saved under a different name, such as DOIGenerator.)

---

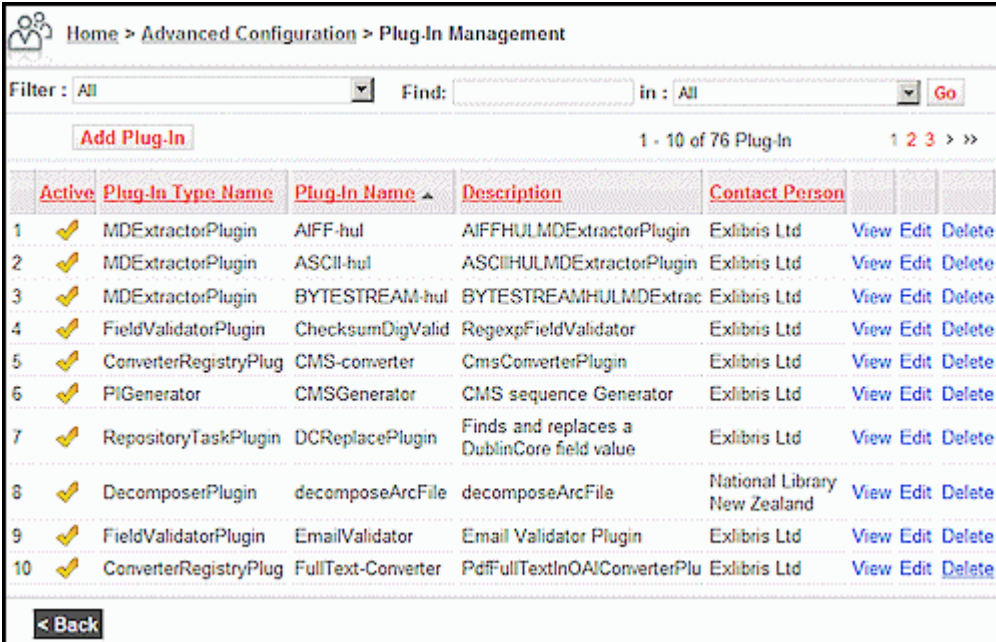
### NOTE:

If you are re-installing or updating the plug-in, you must activate it.

---

### To install an instance of the CMSGenerator plug-in:

- 1 Click **Plug-In Management** on the Home > Advanced Configuration page. The Plug-In Management page opens.



The screenshot shows the 'Plug-In Management' page with a breadcrumb trail 'Home > Advanced Configuration > Plug-In Management'. It features a search bar with 'Filter: All', 'Find:', and 'in: All' with a 'Go' button. Below the search bar is an 'Add Plug-In' button and a pagination indicator '1 - 10 of 76 Plug-In' with page numbers '1 2 3 >>'. The main content is a table with columns: 'Active', 'Plug-In Type Name', 'Plug-In Name', 'Description', and 'Contact Person'. The table lists 10 plug-ins, each with a 'View Edit Delete' link. A '< Back' button is located at the bottom left of the table area.

	Active	Plug-In Type Name	Plug-In Name	Description	Contact Person			
1	✓	MDEXtractorPlugin	AIFF-hul	AIFFHULMDEXtractorPlugin	Exlibris Ltd	View	Edit	Delete
2	✓	MDEXtractorPlugin	ASCII-hul	ASCIIHULMDEXtractorPlugin	Exlibris Ltd	View	Edit	Delete
3	✓	MDEXtractorPlugin	BYTESTREAM-hul	BYTESTREAMHULMDEXtrac	Exlibris Ltd	View	Edit	Delete
4	✓	FieldValidatorPlugin	ChecksumDigValid	RegexpFieldValidator	Exlibris Ltd	View	Edit	Delete
5	✓	ConverterRegistryPlug	CMS-converter	CmsConverterPlugin	Exlibris Ltd	View	Edit	Delete
6	✓	PIGenerator	CMSGenerator	CMS sequence Generator	Exlibris Ltd	View	Edit	Delete
7	✓	RepositoryTaskPlugin	DCReplacePlugin	Finds and replaces a DublinCore field value	Exlibris Ltd	View	Edit	Delete
8	✓	DecomposerPlugin	decomposeArcFile	decomposeArcFile	National Library New Zealand	View	Edit	Delete
9	✓	FieldValidatorPlugin	EmailValidator	Email Validator Plugin	Exlibris Ltd	View	Edit	Delete
10	✓	ConverterRegistryPlug	FullText-Converter	PdfFullTextInOAIConverterPlu	Exlibris Ltd	View	Edit	Delete

Figure 119: Plug-In Management Page

- 2 Click **Add Plug-In**. The List of Plug-In page opens.

	Plug-In Name ^	File Name	Plug-In Type Name	Plug-In Type	
1	<a href="#">AIFF-hul</a>	AIFFHUL-MDextractor.jar	MDExtractorPlugin	java	<a href="#">Install</a>
2	<a href="#">ASCII-hul</a>	ASCIHUL-MDextractor.jar	MDExtractorPlugin	java	<a href="#">Install</a>
3	<a href="#">BYTESTREAM-hul</a>	BYTESTREAMHUL-MDextractor.jar	MDExtractorPlugin	java	<a href="#">Install</a>
4	<a href="#">ChecksumDigitValidPlugin</a>	ChecksumDigitValidator.jar	FieldValidatorPlugin	java	<a href="#">Install</a>
5	<a href="#">CMS-converter</a>	CMS-Converter.jar	ConverterRegistryPlugin	java	<a href="#">Install</a>
6	<a href="#">CMSGenerator</a>	CMSGenerator.jar	PIGenerator	java	<a href="#">Install</a>

[Back](#)

Figure 120: List of Plug-In Page

- 3 Click the **Install** link in the row that contains the CMSGenerator plug-in. The Plug-In Information page opens.

Home > Advanced Configuration > Plug-In Management > Plug-In Information

### Plugin Information

Plug-In Id	-	Plug-In Name	NFixedLengthGenerator
Plug-In Type	PIGenerator	Implementation Type	java
Name		Interface	-
Implementation Name	com.exlibris.dps.repository	Material Type	DIGITAL
Owner	-	Description	URNFixedLengthGenera
Family Type	TASK	Module	Repository
Resource Type	-	Public API	false
Status	-		

### Contact Information

Contact Type	admin	Email address	shaib@exlibris.co.il
Last Name	Ltd	First Name	Exlibris
Address 1	Agodat Asport2 Building 9	City	Jerusalem
Telephone 1	-		

### Plugin Parameters

* Prefix	urn:nbn:de:bvb:12-
* Type	URN

**Back** **Cancel** **Install**

Figure 121: Plug-In Information Page

- 4 In the Plugin Information section, type a unique name and description for the plug-in instance.
- 5 In the Plugin Parameters section, enter the following fields:
  - **Prefix** – Enter the prefix for the DOI. For example, the IDs that are generated by this plug-in will be named **urn:nbn:de:bvb:12-01234556**, where the digits after the prefix are a generated database sequence.
  - **Type** – Enter the DOI type (such as **URN**).
- 6 Click **Install** to create the plug-in instance.  
The Plug-In Management page opens.
- 7 In the list of plug-ins, click the check mark in the row that contains the new plug-in to activate the plug-in.

## Adding the PiGeneratorGenericTask Task to an Enrichment Task Chain

This step adds a **PiGeneratorGenericTask** task to an enrichment task chain.

To add a task to the Enrichment task chain:

- 1 Click **List of Task Chains** on the Home > Advanced Configuration > Repository page.

The Task Chain List page opens.

Active	Name	Description	Groups	Creation Date	Modification Date	
1	✓ Publishing - Add Rule	This task chain will connect the given configuration to the given publ...		19/07/2011 14:57:37	19/07/2011 14:57:37	View Update
2	✓ Validation Stack - Full	This task chain runs the full suite of validation routines on the file...	Validation Stack, Webeditor - Staging, Webeditor - Permanent	19/07/2011 14:57:37		View Duplicate
3	✓ Move To Permanent	This task chain is used by the SIP Processing workflow in order to sto...	Move to Permanent	19/07/2011 14:57:37		View Duplicate
4	✓ Delete Intellectual Entities	This task chain is a reserved task chain used as part of the SIP Proce...		19/07/2011 14:57:37		View Duplicate
5	✓ Enrichment - Minimal	This task chain performs a small set of operations needed before stori...	Enrichment, Webeditor - Staging, Webeditor - Permanent	19/07/2011 14:57:37		View Update

Figure 122: Task Chain List Page

- 2 Click the **Update** link in the row containing the Enrichment task chain. The Task Chain Details page opens.

Home > Advanced Configuration > Repository > List of Task Chains > Task Chain Details

ID: 10      Created By: SYSTEM      Created On: 27/08/2011 00:20:15  
 Updated By:      Updated On:

**General Information**

\* Name:

\* Description:

\* Status:       Status Date: 27/08/2011

\* Log Level:       \* Log Sensitivity:

Groups:

- Workbench
- Validation Stack
- Webeditor - Staging
- Preservation
- Move To Permanent
- Maintenance
- Webeditor - Permanent
- Metadata Validation
- Enrichment

	<input type="button" value="Set order"/>	Name	Description	Next Step On Failure	
1	<input type="button" value="v"/>	Cms Update	Cms Update	<input type="text"/>	<input type="button" value="Delete"/>
2	<input type="button" value="^"/>	OBJECT INDEX TASK	Object Index Task	<input type="text"/>	<input type="button" value="Delete"/>

Figure 123: Task Chain Details Page

- 3 Click the **Add Task** button.  
 The Task List page opens.

Home > Advanced Configuration > Repository > List of Task Chains > Task List

Find  in All Go

31 - 40 of 55 Tasks << < 3 4 5 >>

	Name	Description	Privilege Group	Creation Date	Modification Date	
31	MoveToRecycleBinTask	Move Entities To Recycle Bin	FULL	27/08/2011 00:20:15	27/08/2011 00:20:15	<a href="#">View</a>
32	DCReplacePlugin_Task	This task runs DCReplacePlugin	FULL	27/08/2011 00:24:24	27/08/2011 00:24:24	<a href="#">View</a>
33	NLB_PID_Plugin_Task	This task runs NLB_PID_Plugin	FULL	27/08/2011 00:24:24	27/08/2011 00:24:24	<a href="#">View</a>
34	NLB_PID_Insert_Plugin	This task runs NLB_PID_Insert	FULL	27/08/2011 00:24:25	27/08/2011 00:24:25	<a href="#">View</a>
35	DCReplacePlugin2_Task	This task runs DCReplacePlugin	FULL	27/08/2011 05:03:23	27/08/2011 05:03:23	<a href="#">View</a>
36	Pending File Checksum	Checksum Task	FULL	27/08/2011 00:20:15		<a href="#">View</a>
37	Clean VS Data Task	Clean VS Data Task	FULL	27/08/2011 00:20:15		<a href="#">View</a>
38	Format Identification Task	Format Identification Task	FULL	27/08/2011 00:20:15		<a href="#">View</a>
38	TechID extraction Task	TechID extraction Task	FULL	27/08/2011 00:20:15		<a href="#">View</a>
40	PiGeneratorGenericTask	Persistent Identifier Generator	FULL	27/08/2011 00:20:15		<a href="#">View</a>

[Add](#)

[< Back](#)

Figure 124: Task List Page

- 4 Select the **PiGeneratorGenericTask** task.
- 5 Click the **Add** button.

The PiGeneratorGenericTask task displays in the task list on Task Chain Details page.

Task List Task Parameters

[Add Task](#)

Set order	Name	Description	Next Step On Failure	
1	PiGeneratorGenericTask	Persistent Identifier Generator Task		<a href="#">Delete</a>

Figure 125: Task List - Task Chain Details Page

- 6 Select the **Task Parameters** tab.

The information on the Task Parameters tab opens.

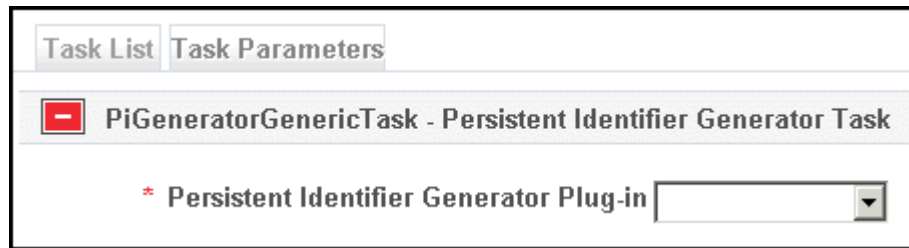


Figure 126: Task Parameters - Task Chain Details Page

- 7 In the drop-down list, select the instance of the plug-in you created previously.
- 8 Click the **Save** button.

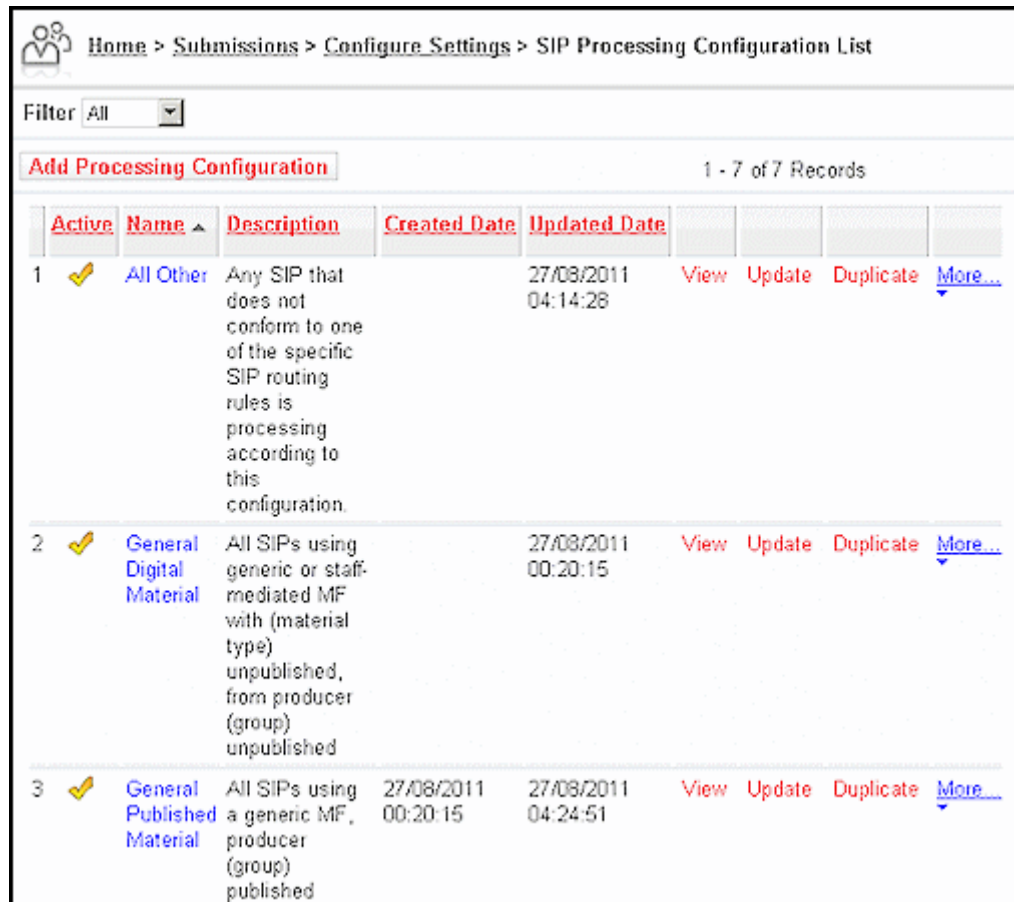
## Selecting the Enrichment Task Chain as Part of the SIP Processing Configuration

In order to use the enrichment task chain that includes the new DOI creation task, make sure it is used in the SIP processing configuration that is in use.

### To select the Enrichment task chain:

- 1 Click **SIP Processing Configuration** on the Home > Submissions > Configure Settings page.

The SIP Processing Configuration List page opens.



Home > Submissions > Configure Settings > SIP Processing Configuration List

Filter All

Add Processing Configuration 1 - 7 of 7 Records

Active	Name	Description	Created Date	Updated Date				
1	✓ All Other	Any SIP that does not conform to one of the specific SIP routing rules is processing according to this configuration.		27/08/2011 04:14:28	View	Update	Duplicate	More...
2	✓ General Digital Material	All SIPs using generic or staff-mediated MF with (material type) unpublished, from producer (group) unpublished		27/08/2011 00:20:15	View	Update	Duplicate	More...
3	✓ General Published Material	All SIPs using a generic MF, producer (group) published	27/08/2011 00:20:15	27/08/2011 04:24:51	View	Update	Duplicate	More...

Figure 127: SIP Processing Configuration List Page

- 2 Click the **Update** link in the row containing the SIP processing configuration.  
The SIP Processing Configuration page opens.

Home > Submissions > Configure Settings > SIP Processing Configuration > SIP Processing Configuration

**General Information**

Name: General Digital Material  
Description: All SIPs using generic or staff-n

**Validation Stages - Pre-approval Automatic Stage**

Validation Stack Routine: Validation Stack - Full

**Approval Stage - Manual Approval/Assessment Stage**

Approval: Assessor and Arranger  
Sampling Rate: 100  
Allow Split/Merge:  Yes  No

**Enrichment - Post Approval Automatic Stage**

Enrichment Routine: Enrichment - Minimal

**Email Notification**

Send Notification:  Yes  No

Cancel Save

Figure 128: SIP Processing Configuration Page

- 3 In the **Enrichment Routine** drop-down list, select the enrichment routine that includes the PiGeneratorGenericTask task you added previously.
- 4 Click the **Save** button.

## Setting the SIP Routing Rules

Make sure the SIP routing rules are using the right SIP processing configuration.

### To set the SIP routing rules:

- 1 Click **SIP Routing Rules** on the Home > Submissions > Configure Settings page.  
The SIP Routing Rule List page opens.

Home > Submissions > Configure Settings > Rule List

Filter All Find in All Go

Add Rule 1 - 4 of 4 Records

	Enabled	Order	Name	Description	Created	Modification Date			
1	✓	▼	General digital material		27/08/2011 00:19:41		<a href="#">Update</a>	<a href="#">Duplicate</a>	<a href="#">Delete</a>
2	✓	▲ ▼	One time publications		27/08/2011 00:19:41		<a href="#">Update</a>	<a href="#">Duplicate</a>	<a href="#">Delete</a>
3	✓	▲ ▼	Periodic publications		27/08/2011 00:19:41		<a href="#">Update</a>	<a href="#">Duplicate</a>	<a href="#">Delete</a>
4	✓	▲	Rosetta METS deposit		27/08/2011 00:19:41		<a href="#">Update</a>	<a href="#">Duplicate</a>	<a href="#">Delete</a>
<b>Default Rule:</b>			Default		27/08/2011 00:19:41		<a href="#">Update</a>		

< Back

Figure 129: SIP Routing Rule List Page

- 2 Click the **Update** link in the row containing the SIP's routing rules. The SIP Rule Details page opens.

The screenshot shows the 'Rule Editor' interface for a SIP routing rule. The breadcrumb navigation is: Home > Submissions > Configure Settings > SIP Routing Rules > Rule Details. The rule name is 'General digital material'. The description field is empty. The rule was created by the 'System' on 27/08/2011 00:19:41. The 'Input General Parameters' section contains four rows, each with a parameter name, a red asterisk, an equals sign operator, another red asterisk, and a dropdown menu. The parameters are: Material Flow (General digit), Material Type (Unpublished), Producer (Any), and Producer Group (Unpublished). The 'Output Parameters' section contains three rows with a parameter name, a red asterisk, and a dropdown menu: Approver Group (Un-published Approve), Department (Demo Department), and Process Configuration Id (General Digital Materi). At the bottom are 'Cancel' and 'Save' buttons.

Parameter	Operator	Value
Material Flow *	=	General digit *
Material Type *	=	Unpublished *
Producer *	=	Any *
Producer Group *	=	Unpublished *

Parameter	Result
Approver Group *	Un-published Approve
Department *	Demo Department
Process Configuration Id *	General Digital Materi

Figure 130: SIP Rule Details Page

- 3 Make sure the SIP routing rules are using the right SIP processing configuration.
- 4 Click the **Save** button.

## DOI Creation as a Stand-Alone Task Chain

The DOI creation task can be added to a task chain that will be used in a process or a service on IEs that are already in the Permanent Repository.

**To add a task to the Enrichment task chain:**

- 1 Click **List of Task Chains** on the Home > Advanced Configuration > Repository page.

The Task Chain List page opens.

Active	Name	Description	Groups	Creation Date	Modification Date	
1 <input checked="" type="checkbox"/>	Publishing - Add Rule	This task chain will connect the given configuration to the given publ...		19/07/2011 14:57:37	19/07/2011 14:57:37	<a href="#">View</a> <a href="#">Update</a>
2 <input checked="" type="checkbox"/>	Validation Stack - Full	This task chain runs the full suite of validation routines on the file...	Validation Stack, Webeditor - Staging, Webeditor - Permanent	19/07/2011 14:57:37		<a href="#">View</a> <a href="#">Duplicate</a>
3 <input checked="" type="checkbox"/>	Move To Permanent	This task chain is used by the SIP Processing workflow in order to sto...	Move to Permanent	19/07/2011 14:57:37		<a href="#">View</a> <a href="#">Duplicate</a>
4 <input checked="" type="checkbox"/>	Delete Intellectual Entities	This task chain is a reserved task chain used as part of the SIP Prece...		19/07/2011 14:57:37		<a href="#">View</a> <a href="#">Duplicate</a>
5 <input checked="" type="checkbox"/>	Enrichment - Minimal	This task chain performs a small set of operations needed before stori...	Enrichment, Webeditor - Staging, Webeditor - Permanent	19/07/2011 14:57:37		<a href="#">View</a> <a href="#">Update</a>

Figure 131: Task Chain List Page

- 2 Click the **Add Task Chain** button.  
The Task Chain Details page opens.

Home > Advanced Configuration > Repository > List of Task Chains >  
Task Chain Details

ID: 31339 Created By: Updated On: 27/08/2011 04:50:39  
Updated By: John Smith Created On: 27/08/2011 04:50:35

**General Information**

\* Name: urnTaskChain  
\* Description: URN generation task  
\* Status: Active Status Date: 27/08/2011  
\* Log Level: Task \* Log Sensitivity: All

Groups:

- Workbench
- Validation Stack
- Webeditor - Staging
- Preservation
- Move To Permanent
- Maintenance
- Webeditor - Permanent
- Metadata Validation
- Enrichment

Task List Task Parameters

**Add Task**

Set order	Name	Description	Next Step On Failure	
1	PiGeneratorGeneric	Persistent Identifier Generator Task		Delete

Cancel Save

Figure 132: Task Chain Details Page

- 3 Click the **Add Task** button.  
The Task List page opens.

Home > Advanced Configuration > Repository > List of Task Chains > Task List

Find  in All Go

31 - 40 of 55 Tasks << < 3 4 5 >>

	Name	Description	Privilege Group	Creation Date	Modification Date	
31	MoveToRecycleBinTask	Move Entities To Recycle Bin	FULL	27/08/2011 00:20:15	27/08/2011 00:20:15	<a href="#">View</a>
32	DCReplacePlugin_Task	This task runs DCReplacePlugin	FULL	27/08/2011 00:24:24	27/08/2011 00:24:24	<a href="#">View</a>
33	NLB_PID_Plugin_Task	This task runs NLB_PID_Plugin	FULL	27/08/2011 00:24:24	27/08/2011 00:24:24	<a href="#">View</a>
34	NLB_PID_Insert_Plugin	This task runs NLB_PID_Insert	FULL	27/08/2011 00:24:25	27/08/2011 00:24:25	<a href="#">View</a>
35	DCReplacePlugin2_Task	This task runs DCReplacePlugin	FULL	27/08/2011 05:03:23	27/08/2011 05:03:23	<a href="#">View</a>
36	Pending File Checksum	Checksum Task	FULL	27/08/2011 00:20:15		<a href="#">View</a>
37	Clean VS Data Task	Clean VS Data Task	FULL	27/08/2011 00:20:15		<a href="#">View</a>
38	Format Identification Task	Format Identification Task	FULL	27/08/2011 00:20:15		<a href="#">View</a>
39	TechID extraction Task	TechID extraction Task	FULL	27/08/2011 00:20:15		<a href="#">View</a>
40	PiGeneratorGenericTask	Persistent Identifier Generator	FULL	27/08/2011 00:20:15		<a href="#">View</a>

[Add](#)

[< Back](#)

Figure 133: Task List Page

- 4 Select the **PiGeneratorGenericTask** task.
- 5 Click the **Add** button.

The PiGeneratorGenericTask task displays in the task list on Task Chain Details page.

Task List Task Parameters

[Add Task](#)

Set order	Name	Description	Next Step On Failure	
1	PiGeneratorGenericTask	Persistent Identifier Generator Task	<input type="text"/>	<a href="#">Delete</a>

Figure 134: Task List - Task Chain Details Page

- 6 Select the **Task Parameters** tab.

The information on the Task Parameters tab opens.

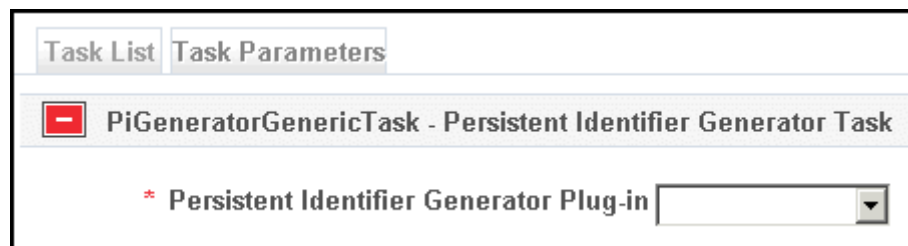


Figure 135: Task Parameters - Task Chain Details Page

- 7 In the drop-down list, select the instance of the plug-in you created previously.
- 8 Click the **Save** button.

## Configuring Handle Creation and Publishing

The Handle DOI (which is used by NLNZ) is implemented in Rosetta with the following tasks:

- **PiGeneratorTask** – creates the Handle.
- **PiPublisherTask** – publishes the Handle.

To use these tasks as part of the Enrichment task chain or as a stand-alone task chain, make sure these tasks are included in the list of tasks for the task chain, either in the Enrichment task chain that is used by the SIP Processing Configuration and the SIP Routing Rule, or in the list of tasks of the stand-alone task chain.

Home > Advanced Configuration > Repository > List of Task Chains > Task Chain Details

ID: 4    Created By: SYSTEM    Created On: 27/08/2011 00:20:15  
 Updated By:    Updated On:

**General Information**

Name:

Description:

Status:     Status Date: 27/08/2011

Log Level:     Log Sensitivity:

Groups:

- Workbench
- Validation Stack
- Webeditor - Staging
- Preservation
- Move To Permanent
- Maintenance
- Webeditor - Permanent
- Metadata Validation
- Enrichment

Set order	Name	Description	Next Step On Failure	
1	Cms Update	Cms Update	<input type="text"/>	<input type="button" value="Delete"/>
2	PiGeneratorTask	Pi Generator Task	<input type="text"/>	<input type="button" value="Delete"/>
3	PiPublisherTask	Pi Publisher Task	<input type="text"/>	<input type="button" value="Delete"/>
4	OBJECT INDEX TASK	Object Index Task	<input type="text"/>	<input type="button" value="Delete"/>

Figure 136: Task Chain Details Page

## Configuring NLB PID Creation and Publishing

The NLB PID is a DOI (used by NLB) that is implemented in Rosetta using the NLB\_PID\_Plugin\_Task task, which creates and publishes the DOI.

In order to use this task as part of the Enrichment task chain or as a stand-alone task chain, make sure that this task is included in the list of tasks for the task chain, either in the Enrichment task chain that is used by the SIP Processing Configuration and the SIP Routing Rule, or in the list of tasks of the stand-alone task chain.

Home > Advanced Configuration > Repository > List of Task Chains >  
 Task Chain Details

ID: 4    Created By: SYSTEM    Created On: 27/08/2011 00:20:15  
 Updated By:    Updated On:

**General Information**

\* Name:

\* Description:

\* Status:     Status Date: 27/08/2011

\* Log Level:     \* Log Sensitivity:

Groups:

- Workbench
- Validation Stack
- Webeditor - Staging
- Preservation
- Move To Permanent
- Maintenance
- Webeditor - Permanent
- Metadata Validation
- Enrichment

Set order	Name	Description	Next Step On Failure	
1	<input type="text" value="Cms Update"/>	Cms Update	<input type="text"/>	<input type="button" value="Delete"/>
2	<input type="text" value="NLB_PID_Plugin_Task"/>	This task runs NLB_PID_Plugin	<input type="text"/>	<input type="button" value="Delete"/>
3	<input type="text" value="OBJECT INDEX TASK"/>	Object Index Task	<input type="text"/>	<input type="button" value="Delete"/>

Figure 137: Task Chain Details Page

# 12

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## Localization

This section contains:

- **User Interface Languages** on page 221
- **UI Customization** on page 224

### User Interface Languages

Rosetta uses an English (American) language default interface. Customers can change the interface language by adding a language to the User Language code table, then adding a translation for all interface objects (such as pages, labels, and values).

Users can add as many languages as they need to Rosetta, then choose among those they have entered.

#### Add a New Language

To access the code table for languages, follow this path: **Advanced Configuration > General > All Code Tables**. Click the text link **User Language** from the list of code tables.

The code table page opens to the User Language table (see figure below).

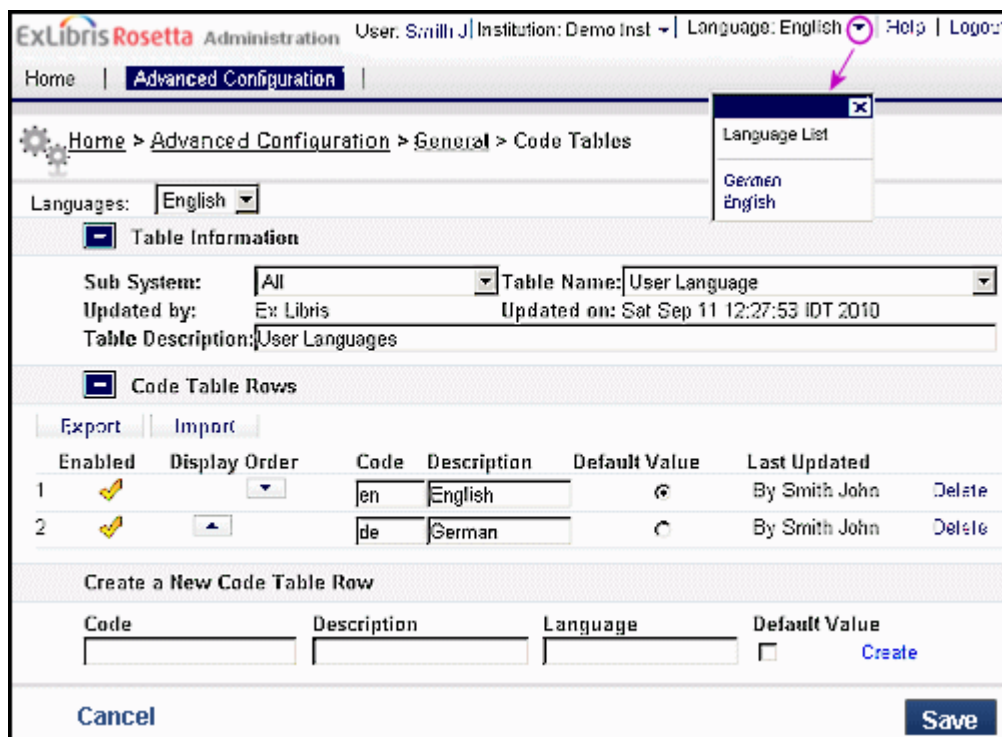


Figure 138: User Language Code Table

To add a new language, enter the language’s code and description (for example, code = “fr” and description = “French”) in the fields below the Create a New Code Table Row heading. Then click the **Create** text link.

The data you entered appears as the next row in the User Language code table. Click the **Save** button.

The system saves the new language information and returns you to the List of Code Tables page.

## Adding New Language Values to the Code Table

In order for the new language to appear on the UI, new values must be added to the code tables that store UI text. This can be done in one of two ways:

- **Updating an .XLS File (Export/Import)**
- **Updating in the UI**

For large code tables such as UILabels (over 6,000 rows), the XLS file method should be used to translate the language.

### *Updating an .XLS File (Export/Import)*

The export/import method involves

- exporting the code table content into an .xls file (Excel spreadsheet or another spreadsheet application that reads .xls files)
- modifying the data in the spreadsheet application, and
- importing the spreadsheet back into Rosetta.

You can perform these manual translations one table at a time, from the Code Tables page, or you can export all code tables in a single export and into a single file.

To download the tables one by one, use the **Export** text link in the Code Table Rows section of the Code Tables page (see [Exporting All Code Tables](#)).

To download all code tables that require translating, follow the path **Home > Advanced Configuration > Multi-Language Setting > Export Code Tables**, then select your language and click the **Export** button (see figure below).

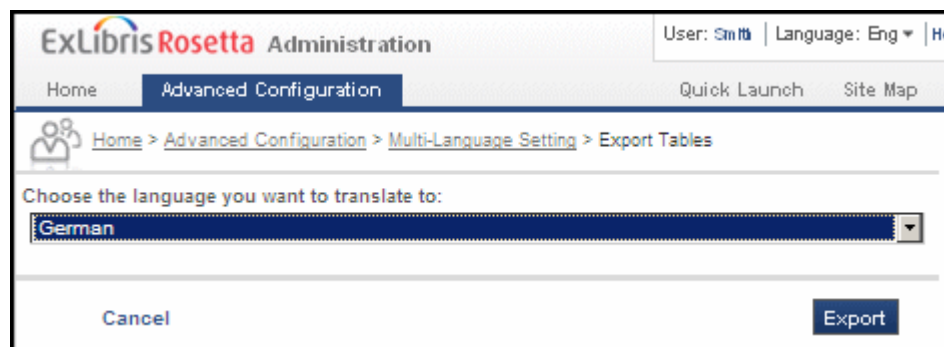


Figure 139: Exporting All Code Tables

When exporting, save the file to the directory of your choice, then open the file and enter translations. When you are finished translating, import the edited spreadsheet using the import function from the Multi-Language Setting page or the Code Tables page.

**NOTE:**

Make sure you select the language you translated into when making this selection for importing. If you change the selected language, the system reloads the UI and sends you back to the Home page.

When the language is loaded, the user can select it for viewing.

### *Updating in the UI*

The UI method involves entering information directly into the code tables as they are displayed on the UI.

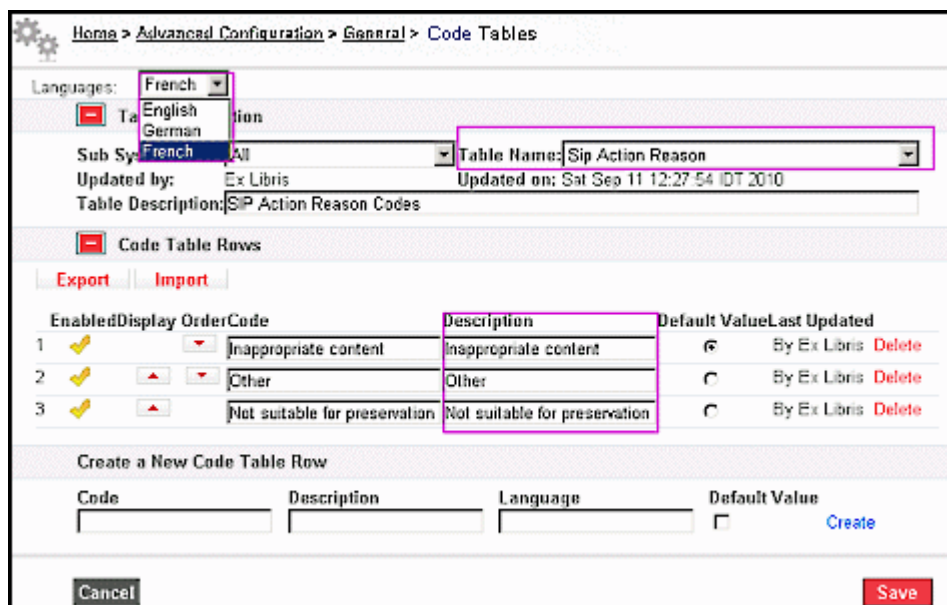


Figure 140: Key Fields for Translating Code Tables

From the **General > Code Tables** page, the user selects the following:

- a UI language from the **Languages** drop-down menu
- the code table from the **Table Name** drop-down menu.

The page refreshes with each selection. The **Description** column displays the text that should be translated into the language selected.

Clicking **Save** returns you to the previous page.

Code	Description
Internal	Interne Approbateur
Unpublished	Un objet d'une publication Approbateur
Published	Publié Approbateur

Figure 141: Translation Fields on the Code Table UI

## UI Customization

Users can change Rosetta's login page image, logo, and color scheme, on the UI Customization page (**Administration module > Localization > UI Customization**).

Use the following links to see relevant topics:

- [Customizing the Login Page Image](#) on page 225
- [Customizing the Rosetta Logo and Color](#) on page 227
- [UI Customization Per Institution](#) on page 228

## Customizing the Login Page Image

You can customize the login page image in the default IU customization for the consortium.

To perform the customization:

- 1 From the UI Customization page (**Administration module > Localization > UI Customization**), click **Edit** for the default UI customization. The following appears:

The screenshot shows a web interface for customizing the login page. The breadcrumb navigation is 'Localization / UI Customization / Details'. The main heading is 'Colors and Logo Settings'. There are five main fields:

- \* Name:** A text input field containing 'Default'.
- \* Description:** A text input field containing 'Default Rosetta UI'.
- \* Color:** A dropdown menu showing 'Blue' with a small blue color swatch to its right.
- \* Logo file:** An empty text input field with a blue 'Browse ...' button and an information icon to its right. Below it is the text '(logo preview will be refreshed after saving the changes)'. A preview of the ExLibris logo is shown below this field.
- \* Background Image file:** An empty text input field with a blue 'Browse ...' button and an information icon to its right. Below it is the text '(Background Image will be refreshed after saving the changes)'. A preview of a background image is shown below this field.

At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'.

Figure 142: Login Page Customization

- 2 From the **Background Image File** field, click **Browse**.
- 3 Click **Save**. The background image you selected appears in the login page.

## Customizing the Rosetta Logo and Color

You can customize the default logo that appears on the top right of the Rosetta header and the color of the interface by creating a customization profile with the logo and color you want. An administrator can then assign the profile to an institution so that the logo and color appear in the Rosetta interface of the institution.

---

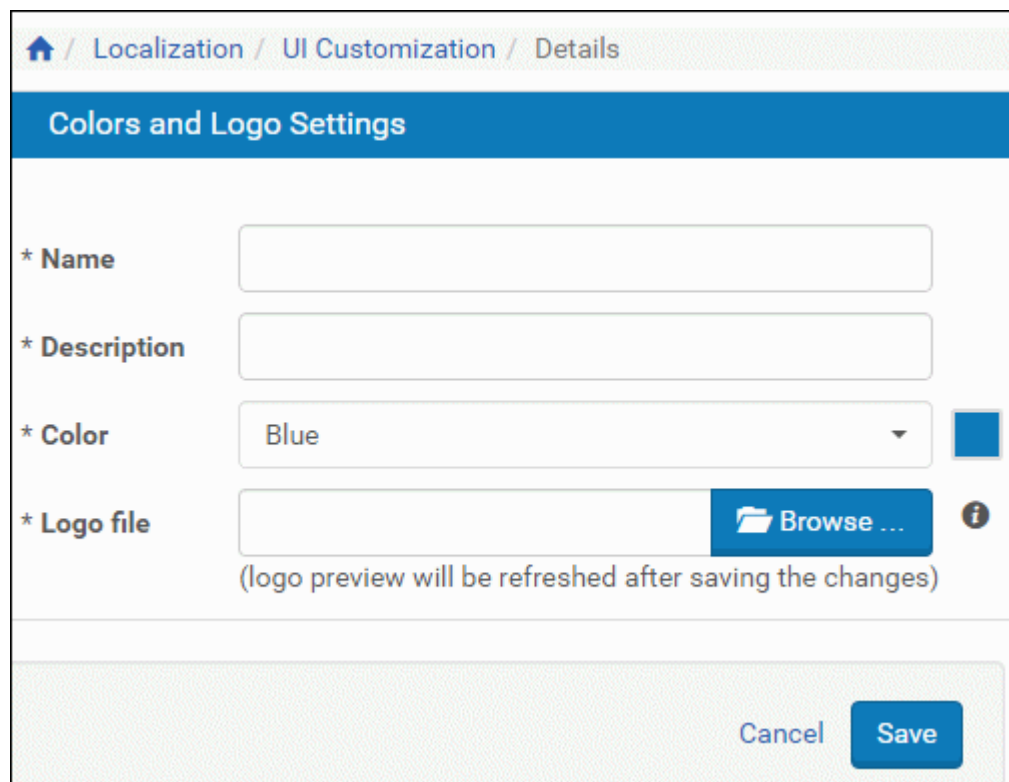
**NOTE:**

There is no automatic restore-default function on the UI Customization page. It is recommended to save a copy of the current logo, so that you can later restore it.

---

### To perform the customization:

- 1 From the Administration module, click **Localization > UI Customization** and click the **Add UI Customization** button. The following appears:



The screenshot shows a web interface for 'UI Customization / Details'. The main heading is 'Colors and Logo Settings'. There are four required fields: '\* Name', '\* Description', '\* Color', and '\* Logo file'. The 'Color' field is a dropdown menu currently set to 'Blue', with a small blue color swatch to its right. The 'Logo file' field is empty and includes a 'Browse ...' button and an information icon. Below the 'Logo file' field, a note states '(logo preview will be refreshed after saving the changes)'. At the bottom right of the form, there are 'Cancel' and 'Save' buttons.

Figure 143: UI Customization

- 2 Enter a **Name** and **Description**. These will be helpful when you or another user assign the customization to a particular institution.
- 3 From the **Color** drop-down list, select a color.

- 4 To set a new logo, click **Browse** and select a logo.

---

**NOTE:**

Logos must be in jpg or png format. The recommended dimensions are 100 X 43.

---

- 5 Click **Save**. The changes are displayed.

You have to assign the new customization to an institution and log on as a user of that institution to see the changes in color and logo. For more information, see [UI Customization Per Institution](#) on page 228.

## UI Customization Per Institution

The System Administrator can define different UI customizations for different institutions. Users who log on to a customized institution see the logo and colors that the Administrator has specified (see [Customizing the Rosetta Logo and Color](#) on page 227) for that institution.

The Delivery of an IE takes on the customization of the institution to which the IE belongs.

### To assign a UI customization to an institution:

- 1 Access the List of institutions page (**Administration module > Administrative Structure**).
- 2 Select the name or **Edit** link of the institution you want to customize.  
The institution's information and list of departments open.

The screenshot shows a web interface for configuring an institution. The top navigation bar indicates the current page is 'Administrative Structure / Details'. The main content is divided into two sections: 'Institution Information' and 'Department List'.

**Institution Information**

\* Code: INS00      \* Name: Demo Institution

Color and Logo Settings: Default

\* Description: Demo Institution

Updated By: admin1      Creation date: 02/03/2017

**Department List**

Create New Department

	Code	Name	Description	Updated On	Updated By		
1	DEP03	DEP03	DEP03	02/03/2017	admin1	Edit	Delete
2	DPR00	Demo Department	Demo Department	-	-	Edit	Delete

Buttons: Back, Save

Figure 144: Assigning Color and Logo to an Institution

- 3 In the institution Information section of the page, from the **Color and Logo Settings** drop-down list, select the name of one of the defined UI customizations.
- 4 Click the **Save** button.

**NOTE:**

Changes may not be immediately viewable. You must be logged on to the institution whose UI you are changing to see the changes. If you are already logged on, refresh the page through your browser.



# 13

## Configuring General Settings

This section contains:

- **Working with Configuration Files** on page 231
- **Working with General Parameters** on page 233
- **Working with Code Tables** on page 234
- **Working with Mapping Tables** on page 238
- **System Checks** on page 241

### Working with Configuration Files

Configuration files enable Administrators to configure advanced settings at the consortial level (such as metadata standards and e-mail configurations that all of the institutions in a consortium must conform to). The configuration files can be stored in various formats, including XML and XSL.

Configuration files are divided into functional groups, known as *file groups*, which can be further divided into sub-groups. **Table 25** describes the organization of configuration files in the Rosetta system.

Table 25. Configuration File Groups and Sub-Groups

File Group	Files Define...
External Interfaces	Interaction with external systems
Metadata Editing Configuration	Web Editor configuration files
XSL Transformation	Manage various XSL files used to transform IEs throughout the system
User Emails Group	XSL files for Email formatting
General	Miscellaneous files

## Adding XSL Configuration Files

You can add XSL configuration files to Rosetta that are used to convert XML documents to user friendly HTML. You can configure file delivery rules that determine when a specific XSL file is used. For more information, see [Delivery Rules](#) on page 38.

To add an XSL configuration file:

- 1 From the Administration interface, select **General > Configuration Files**.

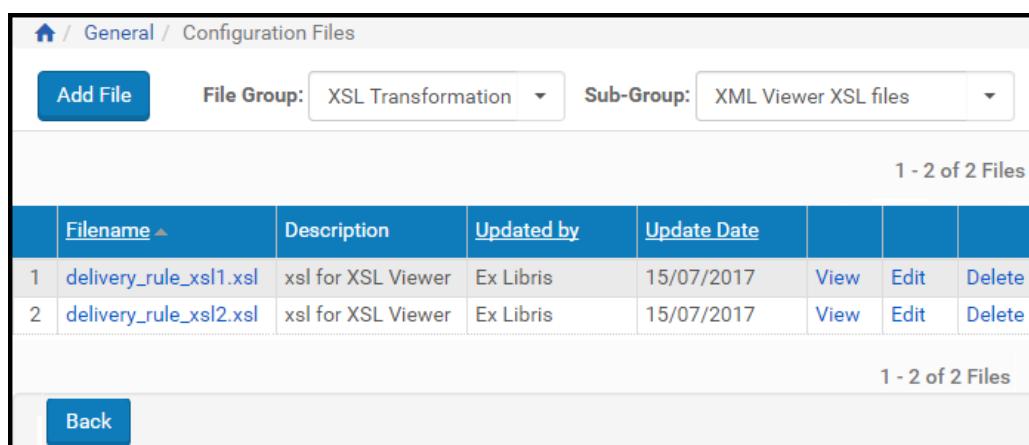


Figure 145: XSL Configuration Files

- 2 Click **Add File**.

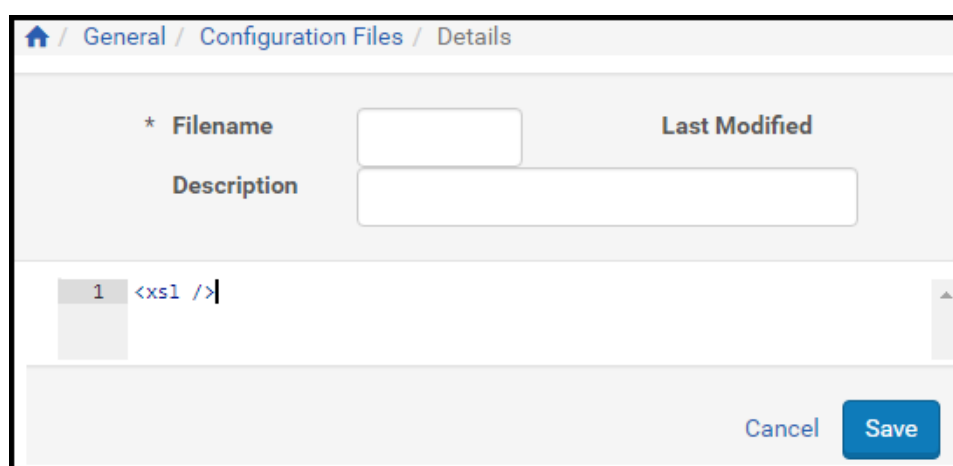


Figure 146: Add XSL Configuration File

- 3 Enter the filename, description, and the XSL configuration file.
- 4 Click **Save**.

The XSL configuration file is available when creating file delivery rules.

## Working with General Parameters

Administrators can configure general parameters to control how the Rosetta system functions. General parameters are divided into functional groups known as modules, some of which are described in the following table.

**CAUTION:**

Avoid accessing general parameters unless you have in depth knowledge of the Rosetta system and you have contacted Ex Libris to discuss changing your settings. Performing an error on a general parameter can cause the system to malfunction.

Table 26. General Parameter Modules

Module	Description
Authentication	Authentication settings, such as the name of the calling system.
Background jobs	Background job execution settings - for example, how many times per minute the system executes the metadata indexer program.
Backoffice	Back office configuration settings, such as default page size and password size.
BIRT	Reporting module settings, such as default paper size.
Delivery	Delivery settings, such as the number of collections to be displayed in a collection viewer page and the maximum file size for delivery.
Deposit	Deposit process settings, such as default page size and event logging.
Format Library	Format Library settings, such as setting a GitHub username and password, to allow you to install the draft of the format library version.
General	General settings, such as system time format.
Menu	Menu settings, such as the directory in which graphs used in reports are stored
Network	Network settings, such as inactivity connection time-out.
Repository	Permanent Repository settings, such as the file storage system.

Table 26. General Parameter Modules

Module	Description
Search	Search settings, such as the bulk size of the export to Excel functionality and the number of columns displayed in the search UI.
SMTP Email	SMTP email settings, such as the SMTP email port and password.

Administrators who do work with the general parameters use advanced configuration and the General Parameters mapping table. (For more information on accessing the List of General Parameters page, see [Administration Components](#) on page 18. For a description of the General Parameters, see the **General Parameters** section of the *Rosetta System Administration Guide*.)

## Working with Code Tables

Code tables contain options that staff and Administrators select when configuring the Rosetta system. For example, the Producer group code table contains groups for a Negotiator to choose from when creating a Producer account.

The Rosetta system assembles code tables into the following groups, known as subsystems:

- Common
- Data Model
- Deposit
- Events
- Infra
- Material Flow Management
- Menu
- Metadata Editor
- Metadata Forms
- Persistent Identifiers
- Preservation
- Process Management
- Producer Management
- Staging

■ User Management

For a description of all available code tables, see [Rosetta Code Tables](#) on page 245.

Administrators can access the catalog of all code tables stored in the Rosetta system using the All Code Tables page. (For information on accessing the All Code Tables page, see [Administration](#) on page 17.).

In addition, this page enables Administrators to open individual code tables for editing. (For more information on working with individual code tables, see [Editing Code Tables](#) on page 235.)

	Table Name	Sub System	Description	Updated By	
1	Access Rights Copyrights	METADATA_EDITOR	Add To Access Rights Copyrights	By Ex Libris	Edit
2	Access Rights Key	METADATA_EDITOR	Add To Access Rights Key	By Ex Libris	Edit
3	Advanced Search Filter List	SET_MANAGEMENT	Advanced Search List Filter Codes	By Ex Libris	Edit
4	Approval Group	STAGING	Approval Group Codes	By Ex Libris	Edit
5	Casual User Mandatory Fields	USER_MANAGEMENT	User Mandatory Fields - Casual	By Ex Libris	Edit
6	Content Structure Filter	MATERIAL_FLOW_MANAGEMENT	Content Structure Filters	By Ex Libris	Edit
7	Content Structure Types	MATERIAL_FLOW_MANAGEMENT	Content Structure Types	By Ex Libris	Edit
8	ContentStructure PreConverter	OBJECT_EDITOR	Content Structure PreConverter	By Ex Libris	Edit
9	ContentStructure Status	MATERIAL_FLOW_MANAGEMENT	Content Structure Status	By Ex Libris	Edit

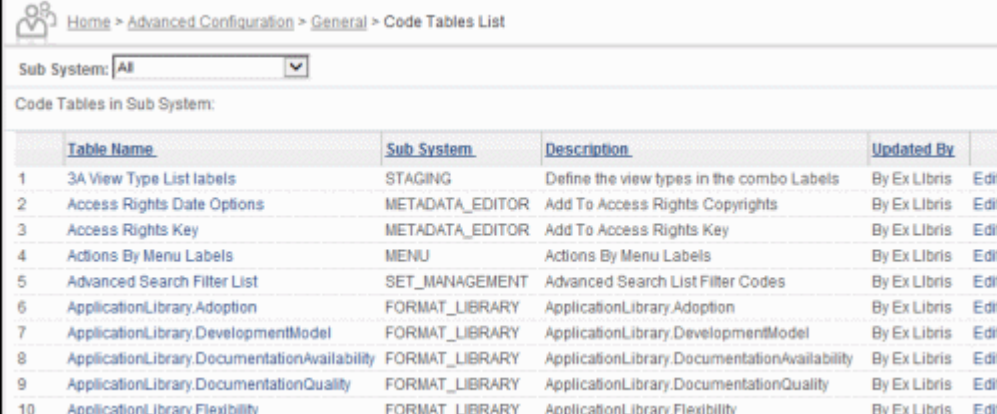
Figure 147: All Code Tables Page

## Editing Code Tables

The All Code Tables page enables Administrators to open code tables for editing.

### To open a code table for editing:

On the All Code Tables page, locate the code table to which you want to add an option and click **Edit**. The page containing available options of the selected code table opens.



	<u>Table Name</u>	<u>Sub System</u>	<u>Description</u>	<u>Updated By</u>	
1	3A View Type List labels	STAGING	Define the view types in the combo Labels	By Ex Libris	Edit
2	Access Rights Date Options	METADATA_EDITOR	Add To Access Rights Copyrights	By Ex Libris	Edit
3	Access Rights Key	METADATA_EDITOR	Add To Access Rights Key	By Ex Libris	Edit
4	Actions By Menu Labels	MENU	Actions By Menu Labels	By Ex Libris	Edit
5	Advanced Search Filter List	SET_MANAGEMENT	Advanced Search List Filter Codes	By Ex Libris	Edit
6	ApplicationLibrary.Adoption	FORMAT_LIBRARY	ApplicationLibrary.Adoption	By Ex Libris	Edit
7	ApplicationLibrary.DevelopmentModel	FORMAT_LIBRARY	ApplicationLibrary.DevelopmentModel	By Ex Libris	Edit
8	ApplicationLibrary.DocumentationAvailability	FORMAT_LIBRARY	ApplicationLibrary.DocumentationAvailability	By Ex Libris	Edit
9	ApplicationLibrary.DocumentationQuality	FORMAT_LIBRARY	ApplicationLibrary.DocumentationQuality	By Ex Libris	Edit
10	ApplicationLibrary.Flexibility	FORMAT_LIBRARY	ApplicationLibrary.Flexibility	By Ex Libris	Edit

Figure 148: Code Table Example

The following actions can be performed from the code table page:

- **Adding an Option to the Code Table** on page 236
- **Activating and Deactivating an Option** on page 237
- **Changing the Display Order** on page 238
- **Deleting an Option** on page 238

### *Adding an Option to the Code Table*

Administrators can add options to a code table.

### To add an option:

- 1 On the Advanced Configuration > General > All Code Tables page, locate the code table to which you want to add an option and click **Edit**. The page containing available options of the selected code table is displayed.

	Table Name	Sub System	Description	Updated By	
1	3A View Type List labels	STAGING	Define the view types in the combo Labels	By Ex Libris	Edit
2	Access Rights Date Options	METADATA_EDITOR	Add To Access Rights Copyrights	By Ex Libris	Edit
3	Access Rights Key	METADATA_EDITOR	Add To Access Rights Key	By Ex Libris	Edit
4	Actions By Menu Labels	MENU	Actions By Menu Labels	By Ex Libris	Edit
5	Advanced Search Filter List	SET_MANAGEMENT	Advanced Search List Filter Codes	By Ex Libris	Edit
6	ApplicationLibrary.Adoption	FORMAT_LIBRARY	ApplicationLibrary.Adoption	By Ex Libris	Edit
7	ApplicationLibrary.DevelopmentModel	FORMAT_LIBRARY	ApplicationLibrary.DevelopmentModel	By Ex Libris	Edit
8	ApplicationLibrary.DocumentationAvailability	FORMAT_LIBRARY	ApplicationLibrary.DocumentationAvailability	By Ex Libris	Edit
9	ApplicationLibrary.DocumentationQuality	FORMAT_LIBRARY	ApplicationLibrary.DocumentationQuality	By Ex Libris	Edit
10	ApplicationLibrary.Flexibility	FORMAT_LIBRARY	ApplicationLibrary.Flexibility	By Ex Libris	Edit

Figure 149: Code Table Example

- 2 Under **Create a New Code Table Row**, provide the requested information.
- 3 Click **Save**. The new option is displayed in the code table.

The new option is now available to Staff and Administrators who configure the Rosetta system.

### Activating and Deactivating an Option

Administrators can temporarily deactivate an option in a code table when they want to make this option unavailable to staff users without deleting it.

On the code table page, the status of the option is indicated by the check mark in the **Active** column:

- Yellow = active
- Grey = inactive

### To activate or deactivate an option in the code table:

- 1 On the code table page, locate the option that you want to activate or deactivate.
- 2 In the **Active** column, click the check mark. The check mark in the **Active** column indicates the new status.

The option status is changed from active to inactive, or from inactive to active.

### *Changing the Display Order*

Administrators can change the order in which options are displayed to staff users on configuration pages.

#### To change the display order:

- 1 On the code table page, in the **Display Order** column, use the up and down arrows to change the display order.
- 2 Click **Save**.

The options are now displayed in the newly defined order.

### *Deleting an Option*

Administrators can delete options from a code table. After deleting an option, it is no longer available on configuration pages.

#### To delete an option:

- 1 On the code table page, locate the option you want to delete and click **Delete**. The confirmation window is displayed.
- 2 Click **OK**.

The option is removed from the code table and is no longer displayed on configuration pages.

## Working with Mapping Tables

Mapping tables enable Administrators to control the connections between entities in the Rosetta system. Like code tables, mapping tables are grouped into subsystems, as described in [Working with Code Tables](#) on page 234. Mapping tables can be edited (see [Editing Mapping Tables](#) on page 239).

Administrators can access the list of all mapping tables stored in the Rosetta system during advanced configuration, using the All Mapping Tables page. In addition, this page enables Administrators to access specific mapping tables.

Home > Advanced Configuration > General > Mapping Tables List

Sub System: All

Mapping Tables in all Sub Systems:

Table Name	Sub System	Description	Updated By
1 3A View Type List	STAGING	Define the view types in the combo	By Ex Libris Edit
2 CSV Loader mandatory Fields	CSV_LOADER	Mapping between the CSV fields and the appropriate DNX and DC fields in Rosetta	By Ex Libris Edit
3 Deposit Registration Rules	PRODUCER_MANAGEMNT	Registration Rules	By Ex Libris Edit
4 Display User Name	USER_MANAGEMENT	Display User Name	By Ex Libris Edit
5 Event Management	EVENTS	Define to each event indicators - Audit and Statistic	By Ex Libris Edit
6 Event Provenance	EVENTS	Define to each event, Provenance indicator	By Ex Libris Edit
7 General Parameters	PRODUCER_MANAGEMNT	General parameters	By Ex Libris Edit

(LIST CONTINUES)

<Back

Figure 150: All Mapping Tables Page

## Editing Mapping Tables

The All Mapping Tables page enables Administrators to open mapping tables for editing.

### To open a mapping table for editing:

On the All Mapping Tables page, locate the mapping table you want to edit and click **Edit**. The page containing entries of the selected mapping table is displayed.

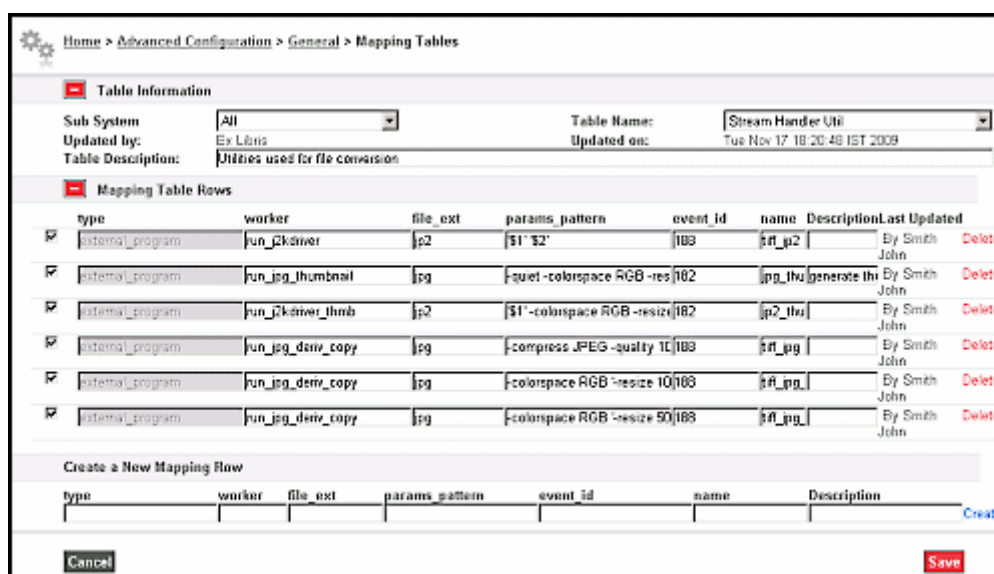


Figure 151: Mapping Table Example - Stream Handlers Mapping Table

Parameters to be provided can vary depending on the mapping table. However, the process of adding and deleting entries is identical for all mapping tables. The following actions can be performed from any mapping table:

- **Adding an Entry to a Mapping Table**
- **Deleting an Entry from a Mapping Table**

### *Adding an Entry to a Mapping Table*

Administrators can add a new entry to a mapping table in order to define the connection between entities in the Rosetta system.

#### **To add an entry to a mapping table:**

- 1 On the All Mapping Tables page, locate the mapping table to which you want to add an entry and click **Edit**. The page containing entries of the selected mapping table is displayed.
- 2 Under **Create a New Mapping Row**, provide the requested information.
- 3 Click **Save**. The new entry is added to the table.

The Rosetta system can now use the new entry as defined.

### *Deleting an Entry from a Mapping Table*

Administrators can delete an entry from a mapping table when the connection between entities is no longer required.

### To delete an entry from a mapping table:

- 1 On the All Mapping Tables page, locate the mapping table from which you want to delete an entry and click **Edit**.

The page containing the entries of the selected mapping table opens.

- 2 Locate the entry you want to delete and click **Delete**.

The entry is removed from the mapping table. The Rosetta system can no longer use the deleted entities.

## System Checks

Rosetta performs the following system checks on start-up:

- Web services – Operability of Deposit, Delivery, Repository, and Permanent Web services in this environment
- PDS – Communication with PDS
- Plug-ins – Access to the plug-ins directory (to make sure that Rosetta has access to all plug-ins)
- Shared folders – Access to and available space in the `operational_shared` and `delivery_shared` folders
- Storage – Access to and available space in operational and permanent storage.

Rosetta may also perform these checks during ongoing sessions. See the *System Administration Guide* for details about their configuration.)

A serious failure for any of these checks results in a red error bar when the user logs on to the system (see **Figure 152**).

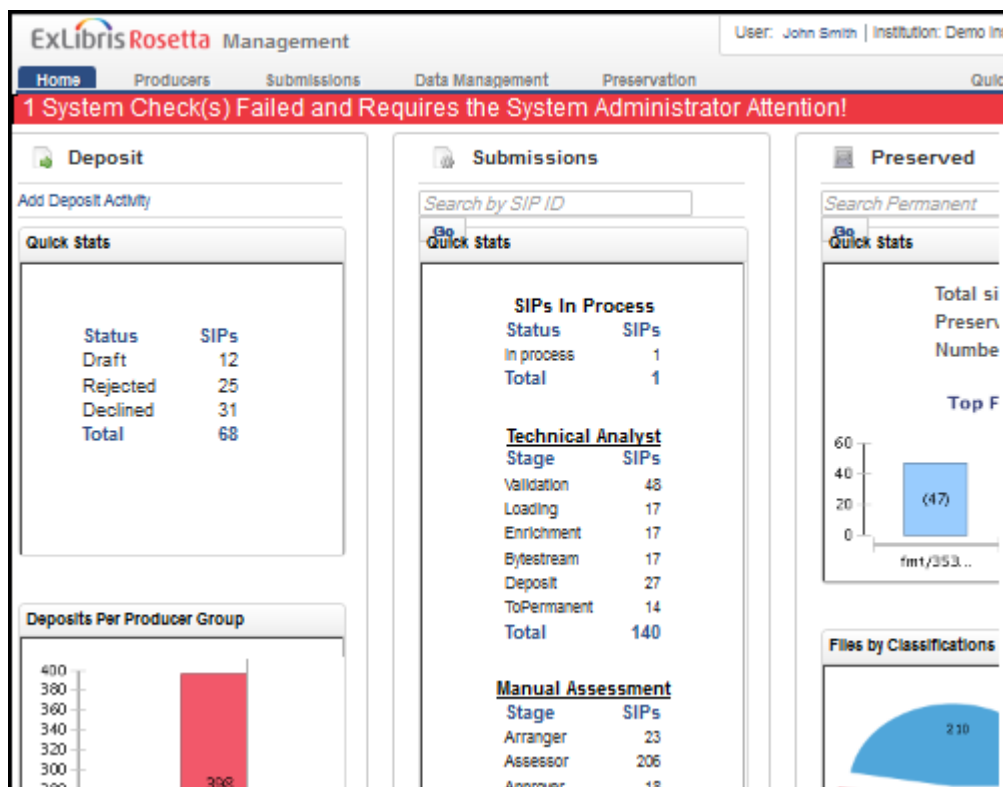


Figure 152: System Check Failure Warning

To view the details of the errors, from the Advanced Configuration page, go to **General > System Checks**.

The System Checks page (Figure 153) displays all of the errors identified by the system during start-up.

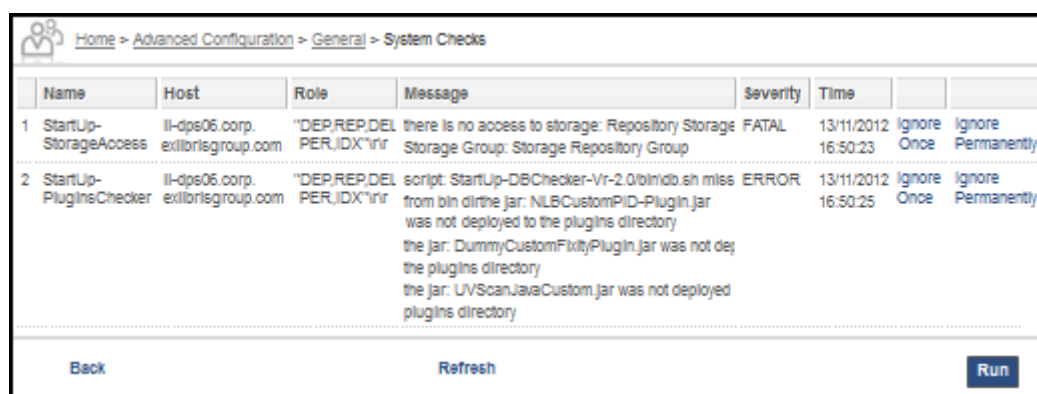


Figure 153: System Checks Page

The following information is included in the error table: name of the system check, host, role, a message about the error(s), the error's severity, and the time the error occurred.

---

**NOTE:**

Errors with the severity of FATAL cause the initial red bar at login. Other errors may allow you to carry out your work, although it is advisable to fix them.

---

Actions that can be taken from the System Checks page are:

- Run – Perform the check again
- Ignore Once – The problem is ignored once (entry is deleted from the database)
- Ignore Permanently – The check is removed from the list of checks

For more information on the configuration of the checks job, see the *System Administration Guide*.



# A

## Rosetta Code Tables

Rosetta code tables can be accessed from System Configuration > General > Code Tables. This path brings you to the Code Tables List (below).

Table Name	Sub System	Description	Updated By
1 3A View	Common	Define the view types in the combo Labels	By Ex Libris (Service... Edit
2 Access R	METADATA_EDITOR	Add To Access Rights Copyrights	By Ex Libris (Service... Edit
3 Access R	METADATA_EDITOR	Add To Access Rights Key	By Ex Libris (Service... Edit
4 Actions E	MENU	Actions By Menu Labels	By Ex Libris (Service... Edit
5 Advance	SET_MANAGEMENT	Advanced Search List Filter Codes	By Ex Libris (Service... Edit
6 Applicati	FORMAT_LIBRARY	ApplicationLibrary.Adoption	By Ex Libris Edit
7 Applicati	FORMAT_LIBRARY	ApplicationLibrary.DevelopmentModel	By Ex Libris Edit
8 Applicati	FORMAT_LIBRARY	ApplicationLibrary.DocumentationAvailability	By Ex Libris Edit
9 Applicati	FORMAT_LIBRARY	ApplicationLibrary.DocumentationQuality	By Ex Libris Edit
10 ApplicationLibrary.Flexibility	FORMAT_LIBRARY	ApplicationLibrary.Flexibility	By Ex Libris Edit
11 ApplicationLibrary.Stability	FORMAT_LIBRARY	ApplicationLibrary.Stability	By Ex Libris Edit
12 Birt Formats	COMMON	Birt Formats	By Ex Libris (Service... Edit
13 Casual User Mandatory Fields	USER_MANAGEMENT	User Mandatory Fields - Casual	By John Smith Edit
14 CodeTable	USER_MANAGEMENT	CodeTable	By Ex Libris (Service... Edit
15 Collection Task Separators	INFRA	Separators for AssignCollectionByDCTask	By Ex Libris (Service... Edit
16 Content Structure Filter	MATERIAL_FLOW_MANAGEMENT	Content Structure Filters	By Ex Libris (Service... Edit
17 Content Structure Types	MATERIAL_FLOW_MANAGEMENT	Content Structure Types	By Ex Libris (Service... Edit
18 ContentStructure Status	MATERIAL_FLOW_MANAGEMENT	Content Structure Status	By Ex Libris (Service... Edit
19 ContentStructureStreamSource	MATERIAL_FLOW_MANAGEMENT	Content Structure Stream Source	By Ex Libris (Service... Edit
20 Copyright Status	METADATA_EDITOR	Copyrights Status	By Ex Libris (Service... Edit
21 Cost Software Initial	PRESERVATION_EVALUATION	Plan List Search By Codes	By Ex Libris (Service... Edit
22 Country Codes	COMMON	Country Codes	By Ex Libris (Service... Edit
23 Delete IE Reasons	METADATA_EDITOR	Delete IE Reasons	By Ex Libris (Service... Edit
24 Dependency Identifier Type	METADATA_EDITOR	Dependency Identifier Type	By Ex Libris (Service... Edit
25 Deposit Auto Reject Reason	DEPOSIT	Deposit Auto Reject Reason Codes	By Ex Libris (Service... Edit
26 Edit File Group Labels	INFRA	Groups for editable configuration files Labels	By Ex Libris (Service... Edit
27 Edit File Sub Group Labels	INFRA	Sub-groups for editable configuration files Lab	By Ex Libris (Service... Edit
28 Edit Shared Metadata Permissions	USER_MANAGEMENT	Metadata Type Options	By Ex Libris (Service... Edit
29 Evaluation Criteria Importance	PRESERVATION_EVALUATION		By Ex Libris (Service... Edit
30 Evaluation Criteria Test	PRESERVATION_EVALUATION	Test	By Ex Libris (Service... Edit

Figure 154: Code Tables List

You can view all the code tables alphabetically or you can filter by sub-system (using the drop-down menu). You can also sort by one of the red bold headings.

For information on how to perform procedures related to code tables, see [Working with Code Tables](#) on page 234.

The following table lists each code table with a brief description of its contents.

Table 27. List of Code Tables

DISPLAY_TABLE_NAME	DESCRIPTION	SUB_SYSTEM
ApplicationLibrary.Adoption	List of possible values that the user can select from, when estimating level of Adoption for each application in the application library	FORMAT_LIBRARY
ApplicationLibrary.DevelopmentModel	List of possible values that the user can select from, when describing development level for each application in the application library	FORMAT_LIBRARY
ApplicationLibrary.DocumentationAvailability	List of possible values that the user can select from, when describing the documentation availability for each application in the application library	FORMAT_LIBRARY
ApplicationLibrary.DocumentationQuality	List of possible values that the user can select from, when describing the documentation quality for each application in the application library	FORMAT_LIBRARY
ApplicationLibrary.Flexibility	List of possible values that the user can select from, when describing the flexibility level for each application in the application library	FORMAT_LIBRARY
ApplicationLibrary.Stability	List of possible values that the user can select from, when describing the stability level for each application in the application library	FORMAT_LIBRARY
Approval Group	List of Approval Group codes and descriptions.	STAGING
Country Codes	List of Country Codes that user can select from when editing the user details form.	COMMON
Delete IE Reasons	The list of possible reasons for deleting an IE.	METADATA_EDITOR
Fixity Type	The list of fixity types available for conducting fixity checks.	METADATA_EDITOR
FormatLibrary.Adoption	List of possible values that the user can select from, when estimating level of Adoption for each format in the format library	FORMAT_LIBRARY

Table 27. List of Code Tables

DISPLAY_TABLE_NAME	DESCRIPTION	SUB_SYSTEM
FormatLibrary.BaseFormat	List of possible values that the user can select from, when describing how basic the format is in regards to being rendered by most applications	FORMAT_LIBRARY
FormatLibrary.Documentation Availability	List of possible values that the user can select from, when describing the documentation availability for each format in the format library	FORMAT_LIBRARY
FormatLibrary.Documentation Quality	List of possible values that the user can select from, when describing the documentation quality for each format in the format library	FORMAT_LIBRARY
FormatLibrary.FormatStability	List of possible values that the user can select from, when describing the stability level for each format in the format library	FORMAT_LIBRARY
FormatLibrary.Standardisation	List of possible values that the user can select from, when describing the standardization level for each format in the format library	FORMAT_LIBRARY
IE Entity Type	List of possible IE Entity Types. (e.g. Digitized book, movie, audio etc.)	DATA_MODEL
Material Type	List of possible Material Types. These values are used for logical grouping of Material Flows.	PRODUCER_MANAGEMENT
Metadata Form - User Defined Lookup - 1	List of possible values that the producer agent can select from when populating a Metadata Form Field.	METADATA_FORM
Metadata Form - User Defined Lookup - 2	List of possible values that the Producer Agent can select from when populating a Metadata Form Field.	METADATA_FORM
Organization Mandatory Fields	List of Mandatory Fields for Organization Users (e.g. First name, last name, telephone number)	USER_MANAGEMENT
Preservation Type	List of possible values for the Preservation Type field of the representation.	COMMON
Producer Classifications	List of possible Producer Classifications for grouping Producers.	PRODUCER_MANAGEMENT
Producer Group	List of possible Producer Groups for grouping Producers and Negotiators.	PRODUCER_MANAGEMENT

Table 27. List of Code Tables

DISPLAY_TABLE_NAME	DESCRIPTION	SUB_SYSTEM
Producer Local Field 1	Text field that can be added to the Producer Form for holding more details.	PRODUCER_MANAGEMENT
Producer Local Field 2	Text field that can be added to the Producer Form for holding more details.	PRODUCER_MANAGEMENT
Producer Mandatory Fields	List of mandatory fields for the Producer record (e.g. Authoritative name)	PRODUCER_MANAGEMENT
Registration Reason	List of reasons that a self registering user can choose from when he fills the registration form. The system selects the matching Producer Group based on the user's selection.	PRODUCER_MANAGEMENT
Restore IE Reasons	List of possible reasons for describing why an IE should be restored and not deleted.	METADATA_EDITOR
Sip Action Reason	List of reasons for rejecting or declining SIPs or IEs that can be selected by the staff members (e.g. Assessor, Approver etc.)	STAGING
Staff User Mandatory Fields	List of mandatory fields for staff users (e.g. First name, last name, telephone number)	USER_MANAGEMENT
Systems	List of external systems with mapping for CMS system code and description.	METADATA_EDITOR
UIMessages	Configure the messages in the UI.	All
User Language	List of Languages that the system can be translated to.	USER_MANAGEMENT
User Mandatory Fields	List of Mandatory Fields for the User record (e.g. First name, last name)	USER_MANAGEMENT
Validation Profile List	List of Descriptive MD Validation Profiles	COMMON
Other Source Metadata Subtype	List of possible subtype values that the user can specify when using source metadata of type OTHER.	DATA_MODEL

**NOTES:**

- File extensions and mime types are managed through the Format Library. Each format has associated file extensions and mime types, and the system presents them as a list when needed.

- File extensions are listed when a user is configuring submission formats or using the Search UI.
  - A list of mime types is displayed as part of the Search UI.
-



# B

## Rosetta Mapping Tables

Rosetta mapping tables can be accessed from **Advanced Configuration > General > All Mapping Tables**. This path brings you to the Mapping Tables List (see figure below).

Table Name	Sub System	Description	Updated By	Edit
1 3A View Ty	STAGING	Define the view types in the combo	By Ex Libris (Servicepack 3.0.1)	Edit
2 Birt Manag	NFRA	Sub-groups for editable configuration file:	By Ex Libris (Servicepack 3.0.1)	Edit
3 CSV Load	CSV_LOADER	Mapping between the CSV fields and the and DC fields in Rosetta	By Ex Libris (Servicepack 3.0.1)	Edit
4 CU Bould	CSV_LOADER	Metadata structure for depositing into Ro	By Ex Libris (Servicepack 3.0.1)	Edit
5 Deposit Registration Rules	PRODUCER_M	Registration Rules	By Ex Libris	Edit
6 Display User Name	USER_MANAG	Display User Name	By Ex Libris	Edit
7 Event Management	EVENTS	Define to each event indicators - Audit a	By Ex Libris	Edit
8 Event Provenance	EVENTS	Define to each event, Provenance indica	By Ex Libris	Edit

Figure 155: Mapping Tables List

You can view all the mapping tables alphabetically or you can filter by sub-system (using the drop-down menu). Or you can sort by one of the red bold headings.

For information on how to perform procedures related to mapping tables, see [Working with Mapping Tables](#) on page 238.

The following table lists each mapping table with a brief description of its contents.

Table 28. List of Mapping Tables

DISPLAY_TABLE_NAME	DESCRIPTION	SUB_SYSTEM
3A View Type List	Define the view types in the combo	STAGING
Display User Name	This table determines the appearance order of the first name and last name in the different user types.	USER_MANAGEMENT
Event Management	List of all system events with the indications whether it is Audit and/or Statistic events.	EVENTS
Event Provenance	This table shows the list of events that are indicated as Provenance Events	EVENTS
General Parameters	General parameters	PRODUCER_MANAGEMENT
Handle PI Creation	This table holds the parameters for the PI creation (e.g. PI Prefix)	PI
Handle PI Publishing - Public/Private Key	This table holds the parameter for the Handle PI Publishing - for records that have Public or Private Key	PI
Handle PI Publishing - Secret Key	This table holds the parameter for the Handle PI Publishing - for records that have Secret Key	PI
Homepage Bulletin	This table holds the text that can be shown in the Home page, on top of the links to the management areas.	MENU
IP WebService Restriction	This table holds the mapping between list of web services and IP ranges where these web services are restricted.	INFRA
List Of Servers	This table holds the different servers of the system and their paths.	COMMON
Preservation Properties	This table holds the list of fields that are part of the Descriptor file, used for external preservation alternatives.	PRESERVATION
Role Quick Links	This table allows users to hide or customize the labels of items in the Quick Launch Menu.	MENU
Stream Handler Util	This table holds the mapping between the command names of the Utilities used for file conversion and their specific parameters.	STAGING

Table 28. List of Mapping Tables

DISPLAY_TABLE_NAME	DESCRIPTION	SUB_SYSTEM
Technical Metadata Extraction Adaptors	This table holds the list of the different adapters of the MD Extractors	DEPOSIT
User History Event List	This table holds the list of events that are displayed to the Producer Agent in the Deposit work area.	EVENTS
Birt Management Reports	This table defines how reports appear in the user interface.	INFRA



# C

## Events

The following table describes events in Rosetta. The following types of events are possible:

- Provenance Event – an action that involves at least one object in the repository. Its details are stored in the object's DNX.
- Audit Event – an event that is stored as a discrete entry in an audit event table and can be accessed through reports.
- Statistic Event – an event that is added to a calculated aggregate of events over a period of time, used for determining event measures (such as average or number).

---

**NOTE:**

If a validation event outcome is identical to a previous event outcome, the outcome is not listed in the dnx. Note that in a case of a validation software upgrade, a plugin version update, and changing tools, the validation event is listed, even if the outcome is the same as the previous event.

---

Table 29. Events

ID	Description	Provenance	Audit	Statistic
1	User authenticated/successful login	N	N	N
2	Create Deposit Activity	N	N	N
3	Save Deposit Activity	N	N	N
4	Delete Deposit Activity	N	N	N
5	Submit Deposit Activity	N	Y	Y
6	Request SIP ID for Deposit Activity	N	N	N
7	Generate SIP ID	N	Y	Y
8	Upload of file(s)	N	N	N

Table 29. Events

ID	Description	Provenance	Audit	Statistic
9	Started Acquiring Content	N	N	N
10	Finished Acquiring Content	N	N	N
11	Started converting SIP contents to METS	N	N	N
12	Finished converting SIP contents to METS	N	N	N
13	Started sanity check of SIP contents	N	N	N
14	Finished sanity check of SIP contents	N	N	N
16	Started wrapping SIP for submission to Staging Server	N	N	N
17	Finished wrapping SIP for submission to Staging Server	N	N	N
18	SIP submitted to Staging Server	N	Y	Y
19	Started converting SIP to AIPs	N	N	N
20	Finished converting SIP to AIPs	N	N	N
21	Created Repository Object	Y	N	N
23	Started Validation Stack Stage	N	N	N
24	Virus check performed on file	Y	N	N
25	Format Identification performed on file	Y	N	N
27	Fixity check performed on file	Y	Y	Y
28	Processing configuration has been determined for the SIP	N	N	N
29	SIP started Technical Analyst stage	N	N	N
30	Technical Analyst - Re-perform Validation Stack	Y	N	N
31	Technical Analyst - Reject File	Y	Y	Y
32	Technical Analyst - Decline File	Y	Y	Y
33	Technical Analyst - Decline SIP	N	Y	Y
34	Technical Analyst - Reject SIP	N	Y	Y

Table 29. Events

ID	Description	Provenance	Audit	Statistic
35	Technical Analyst - Move SIP to Next Step	N	Y	Y
36	Technical Analyst - Quarantine SIP	N	N	N
37	Technical Analyst - Forward SIP	N	N	N
38	Manually Set Format Library ID on File	Y	Y	Y
39	Download File	N	Y	Y
40	Upload and Replace File	Y	Y	Y
41	SIP completed Technical Analyst stage	N	N	N
42	SIP started Assessor stage	N	N	N
43	Assessor - Reject IE	Y	Y	Y
44	Assessor - Decline IE	Y	Y	Y
45	Assessor - Decline SIP	N	Y	Y
46	Assessor - Reject SIP	N	Y	Y
47	SIP completed Assessor stage	N	N	N
48	Assessor - Approve SIP	N	Y	N
49	SIP started Approver stage	N	N	N
50	Approver - Decline SIP	N	Y	Y
52	Approver - Reject SIP	N	Y	Y
54	Approver - Move to next step SIP	N	Y	N
55	SIP completed Approver stage	N	N	N
56	SIP started Arranger stage	N	N	N
57	SIP completed Arranger stage	N	N	N
58	Arranger - Reject SIP	N	Y	Y
59	Arranger - Approve SIP	N	N	N
62	Assign CMS ID to IE	Y	N	N
63	SIP started enrichment stage	N	Y	Y

Table 29. Events

ID	Description	Provenance	Audit	Statistic
64	SIP encountered error in enrichment stage	N	Y	Y
65	System generated a new representation	N	N	N
66	System generated external unique identifier	Y	Y	Y
67	System generated thumbnails	N	N	N
68	System started moving SIP content to permanent repository	N	Y	Y
71	Perform file validation checks on permanent repository	N	N	N
72	System finished moving SIP content to permanent repository	N	Y	Y
73	Generic metadata form record created	N	N	N
74	Generic metadata form record updated	N	N	N
75	Generic metadata form record deleted	N	N	N
76	Personalized metadata form record created	N	N	N
77	Personalized metadata form record updated	N	N	N
78	Personalized metadata form record deleted	N	N	N
79	Code/Mapping/File/GenParam entry was created	N	N	N
80	Code/Mapping/File/GenParam entry was updated	N	N	N
81	Code/Mapping/File/GenParam entry was deleted	N	N	N
82	Generic submission format record created	N	N	N
83	Generic submission format record updated	N	N	N

Table 29. Events

ID	Description	Provenance	Audit	Statistic
84	Generic submission format record deleted	N	N	N
85	Content structure template record created	N	N	N
86	Content structure template record updated	N	N	N
87	Content structure template record deleted	N	N	N
88	Personalized submission format record created	N	N	N
89	Personalized submission format record updated	N	N	N
90	Personalized submission format record deleted	N	N	N
91	Generic Material flow record created	N	N	N
92	Generic Material flow record updated	N	N	N
93	Generic Material flow record activated/ deactivated	N	N	N
94	Generic Material flow record deleted	N	N	N
95	Generic Material Flow associated with Generic Producer	N	N	N
96	Generic Material Flow removed from Generic Producer	N	N	N
97	Personalized Material flow record created	N	N	N
98	Personalized Material flow record updated	N	N	N
99	Personalized Material flow record activated/ deactivated	N	N	N
100	Personalized Material flow record deleted	N	N	N

Table 29. Events

ID	Description	Provenance	Audit	Statistic
101	Generic Material Flow associated with Personalized Producer Profile	N	N	N
102	Generic Material Flow removed from Personalized Producer Profile	N	N	N
103	User record created	N	Y	Y
104	Contact user record created	N	Y	Y
105	Role Profile created	N	N	N
106	Role Profile deleted	N	N	N
107	Role Profile updated	N	N	N
108	Role Profile status changed from/to	N	N	N
109	Role Profile parameters updated from/to	N	N	N
110	User record updated	N	N	N
111	Primary Contact applied	N	N	N
113	User record deleted	N	Y	Y
115	Organization user record deleted	N	N	N
117	User record deletion blocked	N	N	N
120	Add representation	Y	N	N
124	Derive representation	Y	N	N
125	Add Metadata	Y	N	N
126	Edit (jump to editor, into control/streamref/md/des tabs)	N	N	N
127	Export object	N	N	N
128	Download file	N	N	N
130	Object's Metadata Record Modified	Y	N	N
138	Add representation	N	Y	Y
139	Download stream	N	N	N

Table 29. Events

ID	Description	Provenance	Audit	Statistic
144	Converted METS to IE	N	N	N
145	Started Loading IE	N	N	N
146	Finished Loading IE	N	N	N
147	Arranger - Decline IE	Y	Y	Y
148	Arranger - Reject IE	Y	Y	Y
149	Assessor - Assign CMS ID to IE	Y	N	N
150	Set created	N	N	N
151	Set deleted	N	N	N
154	Search is being processed	N	N	N
155	Set updated	N	N	N
156	Producer Agent has been applied	N	Y	Y
157	Producer Agent has been approved by Negotiator	N	N	N
158	Producer Agent's Status has been changed by Negotiator	N	N	N
159	Producer Agent's has been removed	N	N	N
160	Object is being viewed	N	Y	Y
161	Representation deleted	Y	N	N
162	Object's Metadata Record Deleted	Y	N	N
163	Object is being processed for viewing	N	Y	Y
164	Object viewing is denied due to Access Rights restrictions	N	Y	Y
165	Technical Metadata extraction performed on file	Y	N	N
166	Completed Validation Stack Stage	N	Y	Y
167	Metadata enrichment (CMS fetching)	N	N	N
168	Object indexing	N	N	N

Table 29. Events

ID	Description	Provenance	Audit	Statistic
169	User is not authorized to log in to system	N	N	N
170	Upload file	Y	N	N
171	Assign SIP	N	N	N
172	Process Automation task result	N	N	N
173	Process Automation evaluation result	N	N	N
174	Process Ended BULK creation	N	Y	N
175	Worker Started Processing Bulk	N	Y	N
176	Worker Ended Processing Bulk	N	Y	N
177	Watchdog restarted worker	N	Y	N
178	Process Automation Monitor changed Bulk status	N	Y	N
180	Virus Check	Y	Y	N
181	Format ID and Extraction	Y	Y	N
182	Thumbnail	N	Y	N
183	Persistent ID generation	Y	Y	N
184	Persistent ID publishing	N	Y	N
185	Export	N	Y	N
186	Publishing	N	Y	N
187	Delete IE/Rep	N	Y	Y
188	Derivative Copy Creation	N	N	N
189	Metadata Enrichment	Y	Y	N
190	Metadata Validation	N	N	N
191	Assign AR Policy	Y	Y	N
192	Create Search Indexes	N	Y	N
194	Create new process	N	Y	N
195	Delete process	N	Y	N
196	Update Process	N	Y	N
197	Rerun Process	N	Y	N

Table 29. Events

ID	Description	Provenance	Audit	Statistic
198	Automatically Set Format Library ID on File	Y	N	N
199	Automatically Ignore Error	Y	N	N
200	Process Started Execution	N	Y	N
201	Manually Ignore Error	Y	Y	N
202	Process Started BULK creation	N	Y	N
206	Add note to SIP	N	N	N
207	Process Automation framework result	N	N	N
208	Arranger - Decline SIP	N	Y	Y
209	Assessor - Forward SIP	N	N	N
210	Process Ended Execution	N	Y	N
211	Object has been locked	Y	N	N
212	Object has been rolled back	Y	Y	Y
213	Object has been committed	Y	Y	Y
214	Commit/Rollback error	N	Y	Y
215	SIP moved between stages	N	N	N
216	Started MD Validation Stage	N	N	N
217	Failed MD Validation Stage	N	Y	N
218	Completed MD Validation Stage	N	Y	N
271	Email sent to user	N	Y	N
272	IE has been deleted	N	N	N
273	IE has been recovered	N	N	N
274	IE has been purged	Y	N	N
275	IE has been restored	N	N	N
276	IE has been split	N	Y	Y
277	IE has been merged	N	Y	Y
300	Processing Add Representation	N	Y	Y
302	Add Representation failed	N	Y	Y

Table 29. Events

ID	Description	Provenance	Audit	Statistic
303	Add Representation Unknown Property	N	Y	Y
313	ByteStream container extraction	N	Y	Y
317	BitStream technical metadata extraction	N	Y	Y
319	BitStream virus check	N	Y	Y
338	Assign plan evaluator	N	Y	N
339	Preservation plan has been created	N	Y	N
340	Preservation plan has been edited	N	Y	N
341	Preservation plan has been deleted	N	Y	N
342	Plan alternative has been created	N	Y	N
343	Plan alternative has been edited	N	Y	N
344	Plan alternative has been deleted	N	Y	N
345	Plan has been signed off on	N	Y	N
346	Plan status has been changed	N	Y	N
347	Alternative test has been launched	N	Y	N
348	Plan execution has been scheduled	N	Y	N
349	Preservation Plan Execution result	N	Y	N
350	Process Ended block creation	N	Y	N
355	Representation was added by preservation plan execution	Y	Y	N
356	Started Converting Rep	N	Y	N
357	Finished Converting Rep	N	Y	N
358	Started Loading Rep	N	Y	N
359	Finished Loading Rep	N	Y	N
360	Started Enrichment Stack Stage for block	N	Y	N

Table 29. Events

ID	Description	Provenance	Audit	Statistic
361	Completed Enrichment Stack Stage for block	N	Y	N
367	Technical Analyst - Skipped Files	N	Y	N
368	Technical Analyst - Abort Block	N	Y	N
369	Technical Analyst -Rerun Conversion	N	Y	N
370	Technical Analyst -Rerun Loading	N	Y	N
372	Manually Set Format Library ID on File	N	Y	N
373	Manually Set Format Library ID on File	Y	Y	N
374	Evaluator - Manual evaluation of Rep	N	Y	N
375	Evaluator - Complete evaluation	N	Y	N
376	Add note to block	N	Y	N
378	Manually Ignore Error	N	Y	N
379	Rip Moved Between Stages	N	N	N
380	Representation has been added	Y	Y	Y
381	Risk identification performed on file	Y	N	N
382	Permanent failed processing work	N	Y	Y
383	Permanent checksum failed	N	Y	Y
384	Resubmit Deposit	N	Y	Y
385	Upload and Replace File by Producer Agent	Y	Y	Y
386	Request_NLB_PID	Y	Y	Y
387	Recieve_NLB_PID	Y	Y	Y
388	File Original Path has been changed	Y	N	N
389	BitStream risk extraction	N	Y	Y

Table 29. Events

ID	Description	Provenance	Audit	Statistic
390	BitStream file identification	N	Y	Y
391	BitStream file identification zero results	N	Y	Y
392	BitStream file identification multiple results	N	Y	Y
393	BitStream technical metadata extractor not defined	N	Y	Y
396	Manually Ignore Error	Y	Y	N
397	METS Validation Failed	N	Y	Y
398	Collection has been created	N	Y	Y
399	Collection has been updated	N	Y	Y
400	Collection has been deleted	N	Y	Y
401	IE has been added to collection	Y	Y	Y
402	IE has been removed from collection	N	Y	Y
403	Manually ignore file extension mismatch	Y	Y	Y
404	Automatically ignore file extension mismatch	Y	Y	Y
405	Manually ignore file md error	Y	Y	Y
406	Automatically ignore file md error	Y	Y	Y
407	Manually ignore file extension mismatch	Y	Y	Y
408	Manually ignore file md error	Y	Y	Y
409	Assign Retention Policy	Y	Y	Y
410	Unassign Retention Policy	Y	Y	Y
411	Collection has been created by API	N	Y	Y
412	Collection has been updated by API	N	Y	Y
413	Collection has been deleted by API	N	Y	Y

Table 29. Events

ID	Description	Provenance	Audit	Statistic
414	Representation metadata has been updated	Y	Y	Y
415	An AR policy has been removed from an object	Y	Y	N
416	The IE had been moved to another Institution/Department	Y	Y	Y
417	The Representation has been updated	Y	Y	Y
418	Collection has been published	N	Y	Y
419	Collection has been unpublished	N	Y	Y
420	Unassign CMS	Y	Y	Y



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