

Rosetta Staff Users Guide

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Introduction

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Understanding Staff Users

Staff users are responsible for reviewing the content deposited by Producer Agents, managing Producers and Producer Agents, and configuring the way in which Producer Agents deposit content.

The following table describes Staff users' roles and responsibilities:

Staff Users' Responsibilities

Staff Role	Responsibilities
Deposit Managers	<ul style="list-style-type: none"> Configuring generic Producer profiles and material flows <p>Deposit Managers work with the Producers sub-menu. For more information, see Understanding Deposit Managers.</p>
Negotiators	<ul style="list-style-type: none"> Personalizing generic Producer profiles and material flows for the needs of specific Producers Managing Producers and Producer Agents <p>Negotiators work with the Producers sub-menu. For more information, see Understanding Negotiators.</p>
Assessors, Arrangers, and Approvers	<ul style="list-style-type: none"> Reviewing the content deposited by Producer Agents and deciding whether it should be approved, returned to the Producer Agent, or declined <p>Assessors, Arrangers, and Approvers work with the Submission sub-menu. For more information, see Understanding Assessors, Arrangers, and Approvers.</p>
Technical Analysts	<ul style="list-style-type: none"> Repairing technical issues that occur with the content deposited by Producer Agents or in the permanent repository. <p>For more information, see Understanding Technical Analysts.</p>
Editors	<ul style="list-style-type: none"> Editing metadata of the content deposited by Producer Agents Adding new representations <p>Editors work with areas of the Data Management sub-menu. For more information, see Understanding Editors.</p>
Data Managers	<p>Scheduling and monitoring processes, managing sets, publishing configurations, and running activities that affect multiple IEs. Data Managers work with the Data Management sub-menu. For</p>



Staff Role	Responsibilities
Preservation Analyst	<p>more information, see Understanding Data Managers</p> <p>All tasks associated with risk analysis and loss prevention, including:</p> <ul style="list-style-type: none"> • populating Preservation libraries • performing risk analyses on existing library collections • creating, testing, and running plans and plan alternates <p>For more information, see the Rosetta Preservation Guide.</p>
Preservation Manager	<p>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. For more information, see the Rosetta Preservation Guide.</p>

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: System Administrators, 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.

All staff users are assigned and registered by a User Manager.

This guide describes staff users and their responsibilities and explains how management staff users accomplish their tasks.

For additional information on users, role types, and administrative staff responsibilities, see the User Management chapter of the Rosetta Configuration Guide.



Searching and Reporting For All Staff

- [Searching in Rosetta](#)
- [Running and Viewing Reports](#)
- [Reports Available in Rosetta](#)



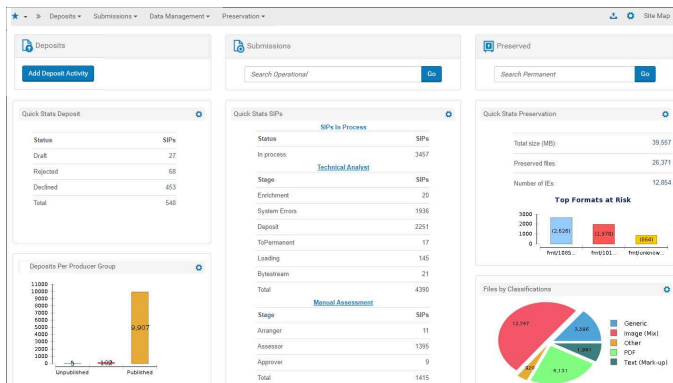
Searching in Rosetta

Home Page

Out-of-the-box, the staff home page contains a summary view of statistics impacting the user, such as the number of SIPs at various stages. Additionally, you have the ability to search for SIPs or IEs or to add a Deposit activity. For details, see:

- [Home Page Summary](#)
- [Quick Search](#)

Home Page Summary



Staff Module Home Page View

If you see a red bar reporting a failed system check, contact your Administrator. For more information, see System Checks of the Rosetta Configuration Guide.

Home Page Customization

You can configure the reports that appear on the home page. To configure the reports that appear, click the Configuration icon next to a report. A list of reports for you to select appears. The following reports are available out-of-the-box:



Select Report

- Delivery Statistics
- Deposit Activity History
- Deposits Per Producer Group
- Files by Classifications
- Process Execution History
- Publishing Statistics
- Quick Stats Deposit
- Quick Stats Preservation
- Quick Stats Preservation
- Quick Stats SIPs

[Close](#)

Select Report

Select a report and click Close. The report appears next to the icon you clicked.

You can configure the reports that are available for selection on this page. This is configured on the Birt Management Reports mapping table:

Mapping Table Rows						
reportFileName	ReportName	ReportLocation	type	Schedule	Description	
<input checked="" type="checkbox"/> files_by_categories.rptdesign	Files by Classifications	dashboard	Files by Classifications	N		Delete
<input checked="" type="checkbox"/> active_deposits_per_producer	Deposits Per Producer Group	dashboard	Deposits Per Producer Group	N		Delete
<input checked="" type="checkbox"/> process_execution_history_dash	Process Execution History	dashboard	Process Execution History	N		Delete
<input checked="" type="checkbox"/> ignore_file_mderror_events.rpt	Files Ignored - MD Error	com.exlibris.dps.wrk-general	Number of files for which a t	Y		Delete
<input checked="" type="checkbox"/> locked_ies.rptdesign	Locked IEs	com.exlibris.dps.wrk-general	Locked IEs	Y		Delete
<input checked="" type="checkbox"/> quick_stats_preservation.rptd	Quick Stats Preservation	dashboard	Quick Stats Preservation	N		Delete
<input checked="" type="checkbox"/> deposit_activity_history_dash	Deposit Activity History	dashboard	Deposit Activity History	N		Delete
<input checked="" type="checkbox"/> quick_stats_deposit.rptdesign	Quick Stats Deposit	dashboard	Quick Stats Deposit	N		Delete

Birt Management Reports Mapping Table

Enter Dashboard in the ReportLocation column for the reports that you want to be available for selection and click Save.

For more information on mapping tables, see the Rosetta Configuration Guide, **Appendix B: Rosetta Mapping Tables**.



Quick Search

Staff can search for objects using the single-field quick search provided on the Home page.

For the quick search under the Submissions heading, users can enter the SIP ID, SIP Title, Deposit ID, or external ID and receive information about the SIP's status.

For the search under the Preserved heading, users can perform one of three search types on the permanent repository—by PID, SIP ID, or text field. The table below describes the three search types.

Quick Search Options

Search By	Description
PID	When a user enters a string beginning with IExxxx, REPxxxx, or FLxxxx, and then clicks Go, the quick search by PID is activated, and Rosetta looks for the selected object type (IE/REP/File) based on its PID. If the PID provided by the user is found, the user is redirected to the Web editor to view or work on the object. If the PID does not exist, Rosetta redirects the user to the Advanced Search page, with the quick search criteria transformed to advanced search criteria (PID = IExxxx) and no results displayed. This allows the user to redefine the search criteria.
SIP ID	When a user enters a numeric string (SIP ID) into the quick search Find box and clicks the Go button, Rosetta searches for all IEs based on that SIP ID. The Advanced Search page opens with the quick search criteria transformed to advanced search criteria (SIP ID = xxxx) and results displayed on the bottom half of the page (under the Results heading).
Text	When a user enters a text string and clicks Go, Rosetta searches for all IEs that match the fields dc:title, dc:description dc:identifier, or dc:creator. The entered text must include a minimum of three characters and may employ an asterisk as a wildcard.

The above search options are available for the Preserved heading search only. Rosetta activates one of the three types of searches by analyzing the string typed by the user.

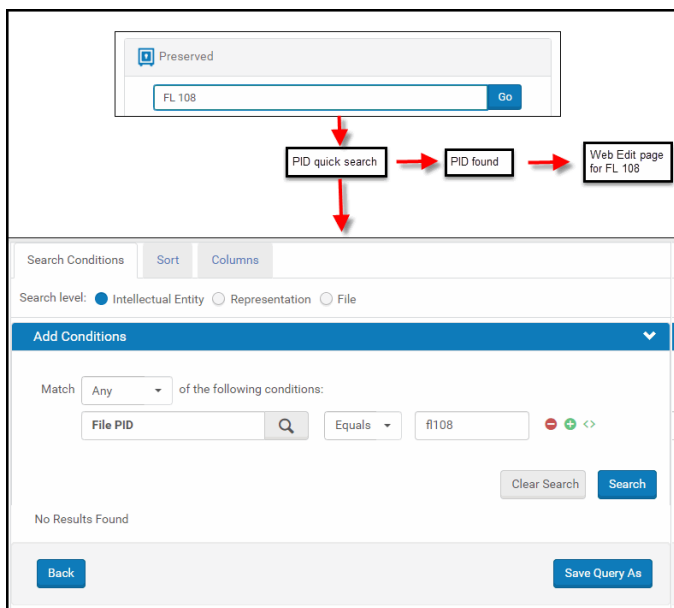
PID searches, when successful, return a single IE, Representation, or File in the Wed Editor, as shown below.

The screenshot shows the Rosetta interface for an Intellectual Entity (IE) with PID IE1003. The top section displays metadata: Created on 24/04/2017 14:40:34, Created by admin1, Committed on 24/04/2017 14:40:53, Committed by admin1, and SIP ID 2. Below this, the object is identified as 'IE (IE1003)' and 'Preservation Master Revision 1 (REP1004)', which contains a 'File (FL1005, 172Kb)'. A 'View Object' button is visible. The right-hand pane shows a detailed view of the object with the following information: PID IE1003, SIP ID 2, Created on 24/04/2017 14:40:34, Created by admin1, Updated on 24/04/2017 14:40:34, Updated by admin1, Entity Type -, Number of Reps 1, and Status ACTIVE. At the bottom, there is a 'Back' button, an 'Actions' dropdown menu set to 'IE Export', and a 'GO' button.

Quick Search Results for Found PID

PID searches that fail to find a match return results on an Advanced Search page with the search terms reformatted into a query row (see below). All other searches, whether successful or not, resolve to the Advanced Search page.





Quick Search (PID) to Advanced Search

From here, users can modify their search, add conditions for a complex query, view thumbnails, export results, and sort and configure columns for results displays.

Advanced Search

The advanced search provides flexibility in the degree of complexity and specificity of a search.

See the following sections for details:

- [Advanced Search Page Layout](#)
- [Advanced Search Conditions](#)
- [Field Element Selection](#)
- [Nested Search Conditions](#)
- [Operators](#)
- [Value Field](#)

Advanced Search Page Layout

The Advanced Search page opens following most searches conducted from a Quick Search box (also from the Search for Objects link of the Data Management module).

The page consists of a top portion, where users can hone their search conditions, set sort preferences for results, and specify columns for display (ands to Excel), and a bottom portion, where results are displayed.



Data Management: Search for Objects

Search Conditions **Sort** Columns

Search level: Intellectual Entity Representation File

Add Conditions

Match: All of the following conditions:

SIP ID Is Not Empty

Clear Search Search

Results

View: Default Paging 1 - 10 of 637 Records 1 2 3 > >>

	Title (DC)	Type (DC)	SIP ID	Producer Name	IE Creation Date	IE Viewer	Editor	Export
1	door		31	Demo Internal Producer	04/11/2018	IE Viewer	Editor	Export
2	door		32	Demo Internal Producer	04/11/2018	IE Viewer	Editor	Export
3	door		33	seleniumProducer1_B86...	04/11/2018	IE Viewer	Editor	Export
4	door		34	seleniumProducer1_B86...	04/11/2018	IE Viewer	Editor	Export
5	door		35	Demo Internal Producer	04/11/2018	IE Viewer	Editor	Export
6	door		36	Demo Internal Producer	04/11/2018	IE Viewer	Editor	Export
7	door		37	Demo Internal Producer	04/11/2018	IE Viewer	Editor	Export
8	door		38	seleniumProducer1_B86...	04/11/2018	IE Viewer	Editor	Export
9	door		39	seleniumProducer1_B86...	04/11/2018	IE Viewer	Editor	Export
10	door		40	seleniumProducer1_B86...	04/11/2018	IE Viewer	Editor	Export

Advanced Search Page

Options for searching, saving, exporting, and displaying results are discussed below.

You can resize the columns of the result table, set the number of results that appear on a page, have the results appear in list or thumbnail view (see [List or Thumbnail View](#)), and open or close the facets pane. These settings are saved for the next time you log on to Rosetta. For more information, see **User Preferences** in the Rosetta Overview Guide.

Advanced Search Conditions

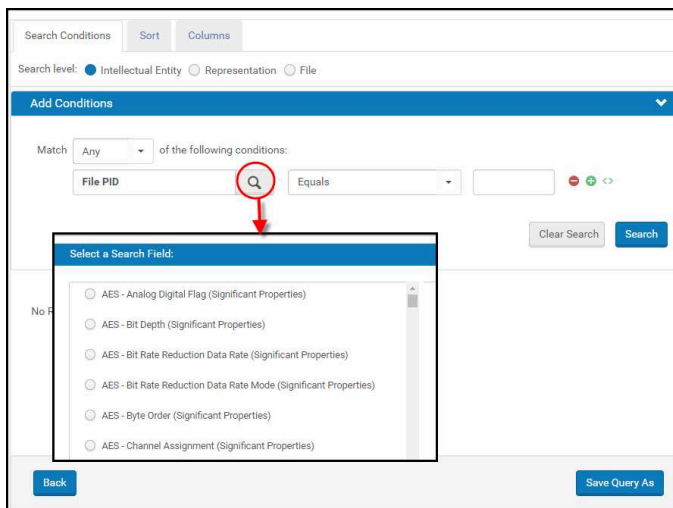
For each condition of a search, a row with the field element name, an operator selection, and a value (either text-based or drop-down-list based) appear. To add a row parallel to the existing one, click the green circle button with the plus sign. To add a nested row, click the button with the upper plus sign and lower brackets. To delete a row, click the red circle button with the minus sign.

To set the relationship between the rows, select Any (Boolean OR) or All (Boolean AND) from the Match drop-down menu.

Field Element Selection

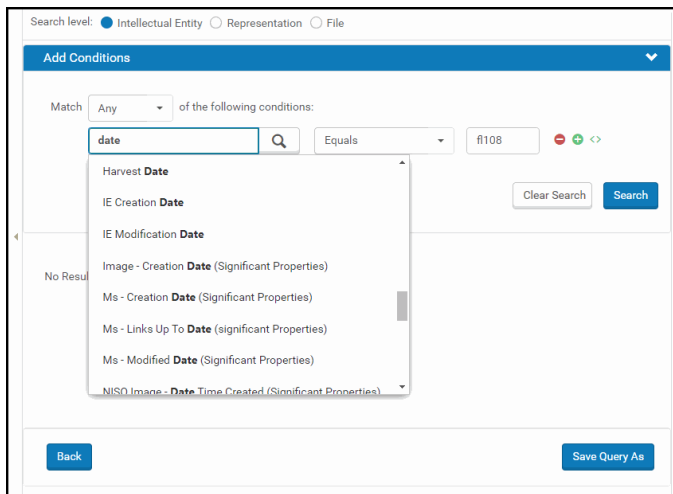
Users can select an element on which to search by clicking the icon to the right of the first text field. A complete list of available search fields opens. (See below.)





Select from all available fields

Alternatively, users can type a search field name directly in the text box, and the system will suggest matches in a drop-down list. Matches contain the same string as the user types but they do not necessarily begin with the same letters, as shown below. The user can continue typing or select a match from the dynamic list.



Auto-fill Element Field

Nested Search Conditions

Users can implement nested search conditions. For each block in the nested search, the user defines (using the All or Any UI operator) whether all the conditions in that block must be true (equivalent to the SQL AND operand) or whether, of the different search conditions, only one (or more) must be true (equivalent to the SQL OR operand). The number of nested blocks is limited to five. The operand between two (or more) rows in the same block is always AND.



Nested Conditions

Operators

Operators are determined by their elements. The following are the most common operators.

- Equals: exact match on word or phrase in value field (alternate: Not Equals)
- < : less/earlier/older than the date in the value field (variants: Before and <= for less than or equal to)
- > : greater/later/more recent than the date in the value field (variants: After and >= for greater than or equal to)
- Contains: all of the items in the value field are present but in no particular order (variants: Contains Keyword and Contains Phrase)
- Does not contain (variants: keywords, phrase): Contains none of the terms in the value field.
- Starts With: result begins with item(s) in the value field
- IsEmpty: field is empty.
- IsNotEmpty: field is not empty.

For more information about options you can use to make your search more precise, see [Value Field](#).

Value Field

To the right of each operator drop-down list is a field for entering the value that restricts your search. The type of data that you enter in the value field is determined by the conditions you selected. Date selections, for example, produce date entries and/ or drop-down calendars in the value field.

To make your search more precise, you can use the following features when defining a value in the Value field:

Features to Improve Search Results

Feature	Description
Cross-Object Query	Search for one type of object using query criteria from another type. For example, you can search for IEs that have PDF files.

Use the following wildcard characters when the value is text and you want to define a pattern:

Wildcard	<ul style="list-style-type: none"> • * - Use this wildcard character at the end of a value. For example, Dan* finds all matches that start with Dan (Daniel, Danzig, danish, etc.)
----------	---



Feature Description

Note: This wildcard must follow a minimum of three characters.

- ? - Use this wildcard character as a placeholder for a single character. You can use it as many times as you want, in an adjacent string or between alternating characters. For example, b??n finds all matches that have a b as the first character and an n as the fourth character (born, boon, barn, etc.)

Search Results Features and Options

Rosetta provides several options for viewing information in the Results area of the Search page:

- [List or Thumbnail View](#)
- [Sort By](#)
- [Column Display](#)
- [Facets](#)
- [Export to Excel](#)

List or Thumbnail View

Search results can be viewed as a detailed list or as thumbnails:

IE PID	Title (DC)	Identifier (DC)	ALMA/MMS (Object Identifier: ID)	View	IE Viewer	Editor	Export
1	IES2958 Finding aid to the Homeward Ladies' Works of Art			View	IE Viewer	Editor	Export
2	IES5453 Example for Seoul Institute of the Art			View	IE Viewer	Editor	Export
3	IES9738 Ernest Hemingway Art			View	IE Viewer	Editor	Export
4	IES3341 Abstract Art Found in the Orion Website			View	IE Viewer	Editor	Export

Search Results List View

Thumbnail	View Editor
	View Editor
	View Editor
	View Editor
	View Editor



Search Results Thumbnail View

Sort By

All single-value elements can be configured as sortable. Four sorts can be configured in order of priority. Once an element has been selected for sorting, it no longer appears in the list of available elements.

If more than one instance of an element occurs in a single record (for example, two Creators, A and B), Rosetta uses only the first value (A) for the sort on Creator. (Both A and B are used in a search of the Creator element, but the results are sortable by A only.)

Users enter the elements and their sort priority on the Sort tab of the Search page (see below)

The screenshot shows the 'Sort' tab of the search results page. It includes a 'Search level' section with radio buttons for 'Intellectual Entity' (selected), 'Representation', and 'File'. Below this are four 'Sort By' fields, each with a dropdown menu set to 'Asc.'. There is a 'Save Sort Preferences' checkbox and 'Clear Sort' and 'Apply Sort' buttons. The 'Results' section shows a table with 8 rows and columns for Title (DC), Type (DC), SIP ID, Producer Name, IE Creation Date, and actions (View, IE Viewer, Editor, Export). The table is paginated to show 1-10 of 637 records.

	Title (DC)	Type (DC)	SIP ID	Producer Name	IE Creation Date	View	IE Viewer	Editor	Export
1	door		31	Demo Internal Producer	04/11/2018	View	IE Viewer	Editor	Export
2	door		32	Demo Internal Producer	04/11/2018	View	IE Viewer	Editor	Export
3	door		33	seleniumProducer1_886...	04/11/2018	View	IE Viewer	Editor	Export
4	door		34	seleniumProducer1_886...	04/11/2018	View	IE Viewer	Editor	Export
5	door		35	Demo Internal Producer	04/11/2018	View	IE Viewer	Editor	Export
6	door		36	Demo Internal Producer	04/11/2018	View	IE Viewer	Editor	Export
7	door		37	Demo Internal Producer	04/11/2018	View	IE Viewer	Editor	Export
8	door		38	seleniumProducer1_886...	04/11/2018	View	IE Viewer	Editor	Export

Sort Fields Auto-complete Drop-Down Menu

To choose an element, users type the beginning of the element into the Sort By field, then select the full element name from the auto-complete drop-down list that opens. All elements, whether visible in the Results pane or not, are available for sorting.

Users can select ascending or descending order for each element.

Select Save Sort Preferences to have Rosetta remember your sort preferences for the next time you log on.

Clicking the Apply Sort button sorts the results in the priority and order specified in the top portion of the page.

Column Display

Because all AIP elements are indexed and searchable, the Search Results page can be configured to display any of the elements. By default, the following elements are displayed in the search results according to the object type of the search:

For IE s and representations:

- Title
- Type
- PID
- SIP ID



- Producer
- Creation Date

For files:

- PID
- File Format
- File Extension
- Mime Type
- File Size

To change the items displayed in the search results table:

1. Click the Columns tab at the top of the page.
Two boxes open in the top section of the page. The box on the left lists items currently displaying in the search results. The box on the right contains a text field and lists all items that are available
2. Delete any items you don't want to view in the left box by clicking the minus sign next to the element.
The element moves to the right-side box and will not display as a column in the results.
3. To add an element for display, type the first few letters of the element in the text field of the box on the right.

The screenshot shows the search results interface. At the top, there are tabs for 'Search Conditions', 'Sort', and 'Columns'. Below these, there are radio buttons for 'Search level: Intellectual Entity', 'Representation', and 'File'. The 'Columns' section is active, showing a list of 6 items selected. The 'Results' section displays a table with columns for Title (DC), Type (DC), IE.PID, SIP.ID, Producer Name, and IE.Creation Date. The table contains 10 rows of data.

Title (DC)	Type (DC)	IE.PID	SIP.ID	Producer Name	IE.Creation Date				
Sample 1		IE1067	5	Demo Internal Producer	06/10/2010	View	IE Viewer	Editor	Export
3.2 תוצאות חיפוש		IE1070	5	Demo Internal Producer	06/10/2010	View	IE Viewer	Editor	Export
Northwestern Book Example 2		IE10820	96	Demo Internal Producer	11/03/2011	View	IE Viewer	Editor	Export
books	Photographic Archive	IE1114	9	Printing Office Producer	07/10/2010	View	IE Viewer	Editor	Export
David	Photographic Archive	IE1117	9	Printing Office Producer	07/10/2010	View	IE Viewer	Editor	Export
Fountain	Photographic Archive	IE1120	9	Printing Office Producer	07/10/2010	View	IE Viewer	Editor	Export
Gaudi	Photographic Archive	IE1123	9	Printing Office Producer	07/10/2010	View	IE Viewer	Editor	Export
Web Archive example	Other	IE1183	16	Demo Internal Producer	17/10/2010	View	IE Viewer	Editor	Export

Preparing Columns for Custom Results Display

The system auto-completes with matches in the rows below the text box.

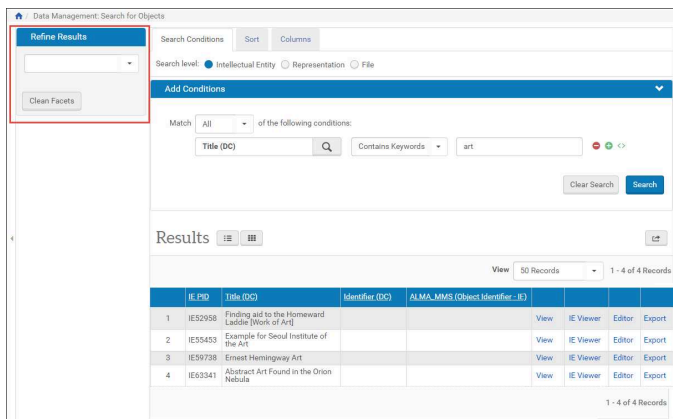
4. Click the plus sign beside any element you want to add to the list.
The element moves from the right-side box to the left-side box, indicating that it will be displayed as a column in the results.
5. Repeat moving elements from left to right and right to left until all the elements you want to display as columns appear in the left box, and any items you don't want to display do not appear in the left column.
6. Click the Apply Columns button to view your search results with the custom elements displayed. (To return to the default list of columns, click the Restore to Default button.)
When the page refreshes, your new columns display information from the objects returned in your search. Your selections are saved across all institutions.



Facets

Search results can be grouped and filtered using facets, which are attributes of items returned in a search. Facets allow you to narrow results according to shared characteristics of records.

When a search returns too many results, use the facets feature in the left column of the page (below).

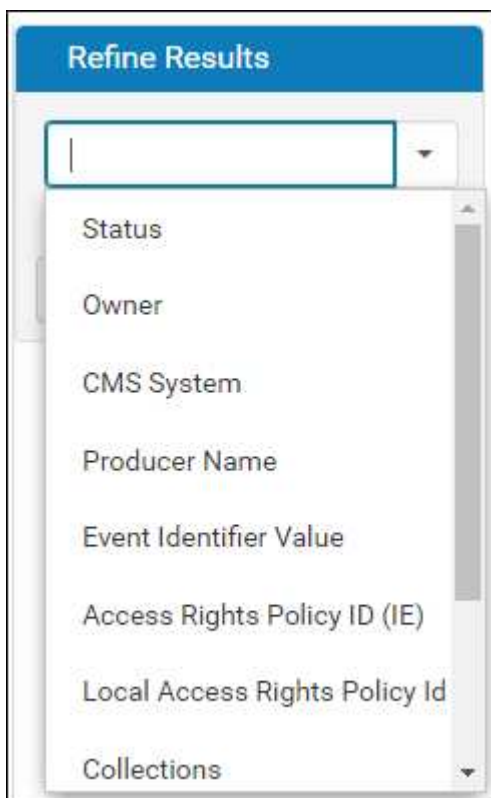


The screenshot shows the 'Refine Results' section of a search application. It includes a search level dropdown set to 'Intellectual Entity', search conditions, and a table of results. The table has columns for ID, Title (DC), Identifier (DC), ALMA/MMS (Object Identifier...), and actions (View, IE Viewer, Editor, Export).

ID	Title (DC)	Identifier (DC)	ALMA/MMS (Object Identifier...)	View	IE Viewer	Editor	Export
1	IE52958 Finding aid to the Homeward Laddie (Work of Art)			View	IE Viewer	Editor	Export
2	IE55453 Example for Seoul Institute of the Art			View	IE Viewer	Editor	Export
3	IE59738 Ernest Hemingway Art			View	IE Viewer	Editor	Export
4	IE63341 Abstract Art Found in the Orion Nebula			View	IE Viewer	Editor	Export

Facets on the Search Results Page

When you click the down arrow in the Refine Results box, available facets appear in a drop-down list (see below).

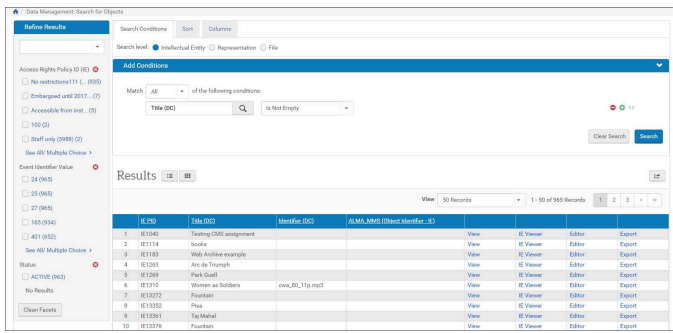


The screenshot shows the 'Refine Results' dropdown menu with a list of facets: Status, Owner, CMS System, Producer Name, Event Identifier Value, Access Rights Policy ID (IE), Local Access Rights Policy Id, and Collections.

Facets List

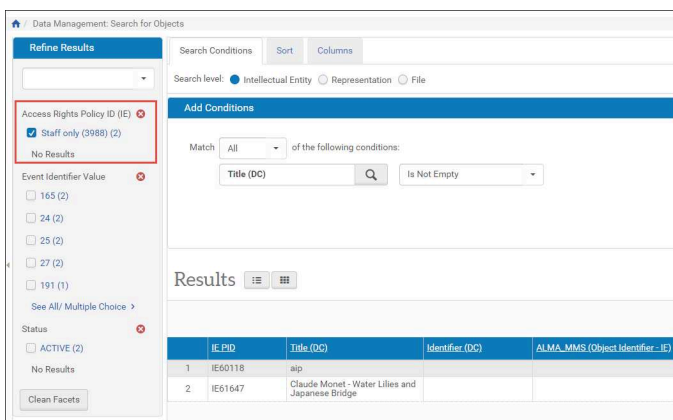
For every facet selected, Rosetta returns a list of values and the number of returned items that share that value (see below).





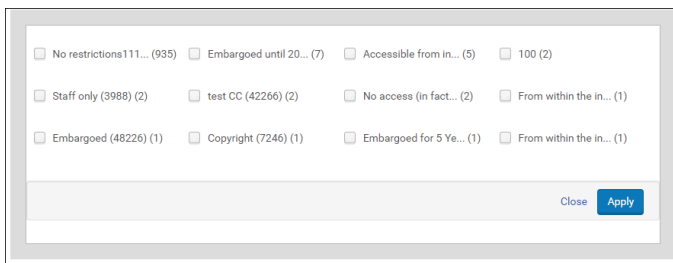
Search Results with Facets

The Refine Results attributes (for example, Event Identifier Value in the figure above) display up to five values with an option to See All. The numbers in parentheses indicate how many records match that attribute value. To show only those records matching a specific value, click the check box for that value. The page reloads showing only those items from the facet you selected (see below).



Facet 27 Selected

For a facet with more than five values, the five values with the most records display in the Refine Results column under that facet's heading. To see all of the facet's values, or to select more than one value to be returned from the group, click See All and select the values from the light box (see below).



Facets "See All" Lightbox

Each search results page can have no more than four facets at one time. To remove a facet from your results, click the red circle with the minus sign beside the facet name. To remove all facets from your search results, click the Clean Facets button.

The list of available attributes is currently fixed and cannot be customized.

Actions

Users can click any of the action-oriented text links in the row of the item they want to work with.



Clicking View delivers the object using delivery rules, simulating an end-user's delivery request.

Clicking IE Viewer makes the system open the General IE Viewer using the default representation profile without going through the rules.

Clicking **Editor** opens the object in the Web editor.

Clicking Export generates an export process and prompts the user for the export path and other export task-related parameters.

If the enforce_ar_export general parameter is set to true, Access Rights will be enforced during export. Certain representations, or the entire IE, may not be exported, in accordance with the IE/REP AR policies.

Export to Excel

Users can export search results into Excel by clicking the export to Excel icon at the top of the Results section. The page reloads with a text message at the top of the page:

Your query will be exported to "/exlibris/dps/d4_1/profile/operational_shared/staff_work_area/admin1/export/queries/Query List 2017-06-15 09.49.29.csv". You can also click the Download button to download the file locally.

In addition to downloading the file to the server, you can click Download to download the excel locally.

The exported Excel spreadsheet includes the same columns and information that appear on the UI. This information is configurable (see [Column Display](#)).



Running and Viewing Reports

Running and Viewing Reports

Staff users can run reports needed by their various positions and roles. Every module in the system has a list of available reports accessed by clicking a link from the module's main page.

Rosetta uses BIRT for its reporting. To view reports within Rosetta, users should have Office 2003 or higher installed on their machines. If they do not, reports will appear in XML format.

This topic includes:

- [Accessing Reports](#)
- [Running a Report: Uploads](#)
- [Scheduling Reports](#)

Accessing Reports

On the main menus for Deposits, Submissions, and Data Management, there is an Advanced Tools heading and, below it, a Run Reports link that takes the user to a page of predefined reports related to the module. Staff users can also access reports through specific related areas on the interface, such as by following the path Deposits > Producers and Agents > Producers and clicking the History link for the Producer Agent whose uploads they want to view.

Rosetta integrates its reporting capabilities with those of the Business Intelligence and Reporting Tools project (BIRT). When users select a report to view, Rosetta opens a new window that is populated with the BIRT Report Viewer interface and the contents of the report. Users can print, export, or re-run the report from this page.

Running a Report: Uploads

To run a report on the upload activity of depositors, click through the Submissions menu to the Advanced Tools/Run Reports link to open the list of available reports.

You can also access this report from the following paths: Deposits > Producers and Agents > Producers > History > Uploads Report or Administration Home > Monitoring and Reports > Submissions > Uploads Report.

From the list of reports page, click Uploads Report. A form opens in the BIRT interface with fields for entering parameters for the report.

The following table describes each field in the Uploads report and how it is used.

Parameters for the Uploads Report

Parameter	Description
Start Date	The date the reporting period starts. This is required.
End Date	The date the reporting period ends. This is required.



Parameter	Description
Producer Name (not pictured)	The Producer name. This field will be a drop-down menu that lists all existing Producers.
Producer ID	The Producer ID. This parameter is optional. By default, the report is generated for all Producers.
Deposit activity ID	The ID of one deposit activity. This field is optional. By default, the report will be generated for all the deposit activities in the period.
SIP ID	The ID of one SIP. This field is optional. By default, the report will be generated for all the SIPs that were deposited within the report period.

After you enter parameters and run the report, BIRT displays the report results. The report contains two sections:

1. The Summary Information section includes the total number of deposit activities and the number that succeeded (were moved to the permanent repository), how many are still being processed, and how many failed.
2. The detail of deposits will be headed by the current reporting period. For each deposit activity, the list includes the date and time of the deposit activity, the deposit activity ID, SIP reference ID, name of the Depositor, name of the Producer, and status of the deposit activity.

Possible status values are "Draft," "Submitted," "Rejected," "Declined," and "Approved." A deposit that has been partially approved and partially declined will have status Approved. A deposit that has been partially rejected will have the status Rejected.

If the status of a deposit activity is Rejected or Declined, the reason will be displayed adjacent to the status.

Scheduling Reports

You can schedule a job to email reports. This job is available under each lobby for the reports of that lobby. Reports with parameters are not supported.

Managing Scheduling Report Jobs

The Manage Scheduled Jobs page enables you to schedule report jobs. To access this page, follow the Rosetta drop-down menu path from any lobby, for example: Deposits > Producers and Agents > Advanced Tools > Schedule Reports. The Manage Scheduled Jobs page opens to existing scheduled report jobs:

Previous Fire Time	Next Fire Time	Frequency	State	History	Update	Run Now
28/11/2013 11:56:41	19/11/2019 09:43:00	-	Normal			

Manage Scheduled Jobs (Scheduled Report Jobs List)

This page enables you to monitor the status of each scheduled report job and perform the following tasks:

- Add a new job – For more information, see [Adding a Scheduled Report Job](#).
- View a job's details – Click the View link next to the job you want to view.



- Modify a job – For more information, see [Modifying a Scheduled Report Job](#).
- Execute a job – Click the Run Now link to run a job manually.

In addition, you can cancel a job. For more information, see [Cancelling a Scheduled Report Job](#).

Adding a Scheduled Report Job

This task allows you to create a new scheduled report job.
To add a Scheduled Report job:

1. Click the Add job button on the Manage Scheduled Jobs page.
The Job Details page opens.

Job Details

2. Enter a name for the scheduled Report job in the Name field.
3. Select the interval at which to execute the job: No Scheduling, Hourly, Daily, Weekly, Monthly, and Advanced.
4. To configure hourly, daily, weekly, and monthly intervals:
 - a. Use the following table to configure the common interval fields:

Common Interval Fields

Section	Field	Description
Start At	Time	Select the hour and minutes from the drop-down fields to specify the time at which to run the job.



Section	Field	Description
	Date	Use the calendar tool or select the month, day, and year from the drop-down fields to select the date at which to start running the job.
	Indefinitely	Select this option to run the job indefinitely.
Repeat	Until	Select the month, day, and year from the drop-down fields to specify the date at which to stop running the job. After this date, the state of the job will change from Normal to Not Running.

- b. Use the following table to configure the interval-specific fields:
Interval-Specific Fields

Type of Interval	Perform this task:	Description
Hourly	Every	Select the hourly interval from the Hours drop-down field.
Weekly	Week days	Select which days of the week to run this job.
Monthly	Monthly At	Select the day of the month to run this job.

For information on how to configure advanced intervals, see [Configuring Advanced Job Schedules](#).

5. Complete the required fields in the Job Parameters pane.
6. Click the Apply button to add the job to the list of scheduled report jobs.

Modifying a Scheduled Report Job

This task allows you to modify the details for an existing scheduled report job.
To modify a Scheduled Report job:

1. On the Manage Scheduled Jobs page, click the Edit link next to the job that Select the interval at which to execute the job: No Scheduling, Hourly, Daily, Weekly, Monthly, and Advanced.
2. To configure hourly, daily, weekly, and monthly intervals:
 - a. Use the following table to configure the common interval fields:

Common Interval Fields

Section	Field	Description
Start At	Time	Select the hour and minutes from the drop-down fields to specify the time at which to run the job.
	Date	Use the calendar tool or select the month, day, and year from the drop-down fields to select the date at which to start running the job.
Repeat	Indefinitely	Select this option to run the job indefinitely.
	Until	Select the month, day, and year from the drop-down fields to specify the date at



Section	Field	Description
---------	-------	-------------

which to stop running the job.
After this date, the state of the job will change from Normal to Not Running.

- b. Use the following table to configure the interval-specific fields:
Interval-Specific Fields

Type of Interval	Perform this task:	Description
Hourly	Every	Select the hourly interval from the Hours drop-down field.
Weekly	Week days	Select which days of the week to run this job.
Monthly	Monthly At	Select the day of the month to run this job.

For information on how to configure advanced intervals, see [Configuring Advanced Job Schedules](#).

3. Complete the required fields in the Job Parameters pane.
4. Click the Apply button to add the job to the list of scheduled report jobs.

Canceling a Scheduled Report Job

Canceling a job allows you to postpone the execution of job indefinitely without deleting it from the system. The Unschedule option will not be available when the state of the job is Not Running. To cancel a Scheduled Report job:

1. On the Manage Scheduled Jobs page, click the Edit link next to the job that you want to modify. The Job Details page opens.
2. Click the Unschedule button. The state of the job should change to Not Running.



Reports Available in Rosetta

Reports Available in Rosetta

Additional reports available in Rosetta may not be set up in your system. The full list includes the following:

ALTERNATIVES_EVALUATION

Description: The list of Preservation evaluations with plan ID and alternative ID.

APPLIBRARY

Description: Application Library information (prsv00.HPRAPPLIBRARY).

APPLICATION_LIBRARY_EVENTS

Description: All events related to the Application Library.

AUTO_EVALUATION

Description: The results of the automatic evaluations.

AUTO_EVALUATION_PER_REP

Description: The results of the automatic evaluations per representation.

BIRT_GENERAL_PARAMETERS

Description: All BIRT general parameters.

BITSTREAM_VIEW

Description: The BitStream information (rep00.HDEBITSTREAMREF) that allows the viewer to run reports based on this information

CLASSIFICATION_LIBRARY_EVENTS

Description: All the events related to the Classification Library.



CLASSIFICATION_PROPERTY

Description: The classification group's significant mapping properties (including mapping to F fields) (prsv00.HPRCLASSIFICATIONPROPERTY).

COLLECTIONS_REPORT

Description: The collection structure and associated intellectual entities.

COMMITTS_TO_PERMANENT_BY_TYPE

Description: The number of commits to the permanent repository by object type.

DELETED_IEs

Description: Lists all IEs that have been deleted or purged within a given time frame.

DELIVERY_STATISTICS

Description: A list of the most viewed objects.

DEPOSIT_ACTIVITIES_PER_MF

Description: The amount of deposit activities per material flow.

DEPOSIT_ACTIVITIES_PER_MT

Description: The number of deposit activities per material type.

DEPOSIT_ACTIVITY_EVENTS

Description: All the events for each deposit activity.

DEPOSIT_ACTIVITY_HISTORY

Description: All the deposits so far with minimal information.

EVALUATION_RESULTS

Description: The evaluation results.

EVENT_HISTORY

Description: Takes an event ID and date range and returns a list of PIDs, event dates, and event key values.

EVENT_KEYS

Description: The keys for the events stored in the EVENTS view.



EVENT_STATISTICS

Description: The statistical information gathered by the statistical analyzer for the events as listed in the events spreadsheet.

EVENTS

Description: All the events in the system.

EXTRACTOR_LIBRARY_EVENTS

Description: Events related to the Extractor Library.

FILE_TYPE_GROUPS_IN_PERMANENT

Description: The types of the various files with quantities and percentage.

FILES_IGNORED - FILE_EXTENSION_MISMATCH

Description: Number of files per format ID that were ignored by the File Extension Mismatch rule.

FILES_IGNORED - FORMAT_VALIDATION_ERROR

Description: Number of files for which a format validation error has been ignored due to an automatic rule, grouped by file format ID.

FILES_IGNORED - MD_ERROR

Description: Number of files per format ID that were ignored by the MD Error rule, grouped by file format ID.

FORMAT_APPLICATIONS

Description: The Format/Application connection (prsv00.HPRFORMATAPPLICATIONS).

FORMAT_LIBRARY

Description: Format Library information (prsv00.FORMATLIBRARY).

FORMAT_LIBRARY_EVENTS

Description: Events related to Format Library.

FORMAT_RISKS

Description: Risks per format.

FORMATS_AT_RISK

Description: A breakdown of SIPs by module and stage.



FORMATS_BREAKDOWN

Description: List of file formats and their occurrence throughout the repository.
This report is refreshed by the Refresh Materialized Views job. For more information, see the System, Background, and Operational Jobs section of the System Administration Guide.

FORMATS_PER_CLASSIFICATION_GROUP

Description: The association of a format to a classification group
Refreshed every 12 hours.

HOMEPAGE_DASHBOARD

Description: The information presented to the user on the home page:

- SIPs Having Technical Issues
 - SIPs Waiting For Approval
 - SIPs Waiting For Arrangement
 - SIPs Waiting For Assessment
 - Deposit Activities
 - Files In Permanent
 - Active Producers
-

IES_BY_SIP_ID

Description: The intellectual entities for a given SIP.

IE_EVENTS

Description: Events for an individual intellectual entity. Parameter = IE ID.

IES_PERMANENT_LIST

Description: The list of IEs with their URLs in the permanent repository.

IES_TO_BE_DELETED

Description: All IEs that are about to be deleted in a given time frame due to retention policies.

INTELLECTUAL_ENTITIES_DELIVERED

Description: Lists key details about access to each digital object:

- PID
 - Title
 - End user ID accessing the object
-



- Date and time of access
- End user ID accessing the object (guest for users that are not logged in)

There are two versions of this report. One contains user details, but is hidden in Rosetta unless configured in the BIRT report mapping table to appear, and the other is anonymized.

LOCAL_APPLICATION_LIBRARY

Description: A list of applications in the local application library.

LOCKED_IEs

Description: A list of locked IEs.

MANUAL_EVALUATION

Description: The manual evaluation results.

MATERIAL_FLOW_LIST

Description: A list of the material flows currently defined in the system.

METADATA_FORM_LIST

Description: The metadata forms available in the system.

MOST_VIEWED_OBJECTS

Description: A list of viewed objects ordered by the number of views.

NEW_MONOGRAPHS_IN_PERMANENT

Description: Monographs (material type = 'MON').

NEW_PERIODICALS_IN_PERMANENT

Description: Periodicals (material type = 'PRD').

PERMANENT_INDEX

Description: The permanent index table which lists all objects stored in the permanent repository.

PRESERVATION_EXECUTION_HISTORY

Description: The history of migrated IEs of executed signed off plans.

PROCESS_EXECUTION_HISTORY

Description: The history of all the existing processes in the system with their statuses.



PRODUCER_DEPOSITS

Description: All the deposits performed so far.

PRODUCER_DEPOSITS_EMAIL

Description: A list of deposit activities.

PRODUCER_EMAIL_IE_VIEWS

Description: The number of IE views.

PRODUCER_GROUP_DEPOSITS

Description: All the deposits with a field showing to which Producer group the Depositor belongs.

PRODUCER_PROFILES_LIST

Description: All existing Producer profiles.

PRODUCERS_LIST

Description: All the Producers currently in the system.

PUBLISHING_STATISTIC

Description: The number of published intellectual entities by publishing configuration.

REPOSITORY_STATS_A

Description: The number of files for groups of different sizes.

REPOSITORY_STATS_B

Description: The list of MIME types and the number of files in each type.

REPOSITORY_STATS_D

Description: Shows numbers regarding the permanent preservation.

RISKLIBRARY

Description: The risks library (prsv00.HPRRISKLIBRARY).

SIP_DETAILS

Description: A list of SIP details by SIP ID.



SIP_DETAILS_BY_DEPOSIT_ID

Description: A list of SIP details by SIP ID by Deposit Activity ID.

SIP_PROCESSING_STATS_PIE

Description: The number of SIPs in each SIP processing stage.

SIPS_DASHBOARD

Description: A breakdown of SIPs by module and stage.

SIPS_STATS

Description: All the SIPs currently in the system. This is used for the report SIPs - Status and Events. The report shows the totals and the details for each stage in the system.

STRUCTURAL_IES_REPORT

Description: Structural IE hierarchies and associated structural IEs. Select All to run the report on all IEs or enter the PIDs for the IEs on which you want to run the report.

SUBMISSION_JOB_DETAILS

Description: No OOTB report (view only). Contains submission job details including the load directory, generated SIPs and their respective statuses.

SUB_JOB_DET_BY_JOBNAME_EXECDATE

Description: a list of Submission Job Details by Job Name and Execution Date.

SUB_JOB_DET_BY_SOURCEDIR

Description: Submission Job Details by Source Dir.

TOTAL_PRODUCER_GROUP_DEPOSITS

Description: The counts of deposits for each Producer group.

UPLOADS_REPORT

Description: A list of deposits by date range.

USER_DETAILS

Description: Information about the user, roles, and roles parameters currently in the system.



Submission Information Package (SIP) Overview

Understanding SIP Statuses and Stages

A SIP's status and stage define its orientation in the SIP Processing workflow.

- Status determines where in the Rosetta interface the SIP can be found and which actions can be carried out on the SIP.
- Stage defines the node that the SIP has completed.

Stage is relevant only while the SIP is in the Repository module. There are no different stages for a SIP in the Deposit module or in the Permanent module (AIP).

The following table describes the different stages and statuses of a SIP:
SIP Stages and Statuses

Module	Stage	Status	Description
Deposit	-	Draft	The SIP has been created by a Producer Agent but has not yet been submitted. (The Producer Agent has clicked Save in the Deposit workflow.)
	-	Declined	The SIP has been declined by the system, Technical Analyst, Assessor, Arranger, or Approver, and the Producer Agent cannot re-submit it.
	-	Rejected	The SIP has been rejected by the system, Technical Analyst, Assessor, Arranger, or Approver, and the Producer Agent can re-submit it.
	-	Created	The SIP has been submitted by the Producer Agent and is waiting for loading into the Repository module.
Repository	Error Stage (Loading, Validation etc.)	In Technical Analyst	The SIP has failed in one of the following system stages in the Repository module and is waiting to be handled manually by the Technical Analyst:
			<ol style="list-style-type: none"> 1. Loading 2. Validation Stack: <ul style="list-style-type: none"> • Virus Check • Format Identification



Module	Stage	Status	Description
			<ul style="list-style-type: none"> • Technical Metadata Extraction • Fixity • Risk Extraction
			<ol style="list-style-type: none"> 3. Bytestream 4. Enrichment 5. To permanent
	Loading	Active	The system has completed loading the SIP from the Deposit into the Repository stage
	Validation Stack	Active	The system has completed validating the SIP through the Validation Stack
	Bytestream	Active	The system has completed extracting bytestream(s) from the files. (Performed only when there are container files such as ZIP files or multiple images.)
	Enrichment	Active	The system has completed enriching the SIP with access copies (according to rules) and/or with descriptive metadata from external systems.
	To Permanent	Active	The system has finished loading the SIP into the permanent repository.
	Assessor	In Human Stage	The SIP is in the Assessor work area waiting for user actions.
	Arranger	In Human Stage	The SIP is in the Arranger work area waiting for user actions.
	Approver	In Human Stage	The SIP is in the Approver work area waiting for user actions.
Permanent	-	Finished	The SIP is in the Permanent repository (AIP).

On the Management homepage dashboard, SIPs In Process refer to SIPs that have all the following characteristics:

- have not reached the permanent repository
- have not been rejected/declined
- are not waiting in a work area.



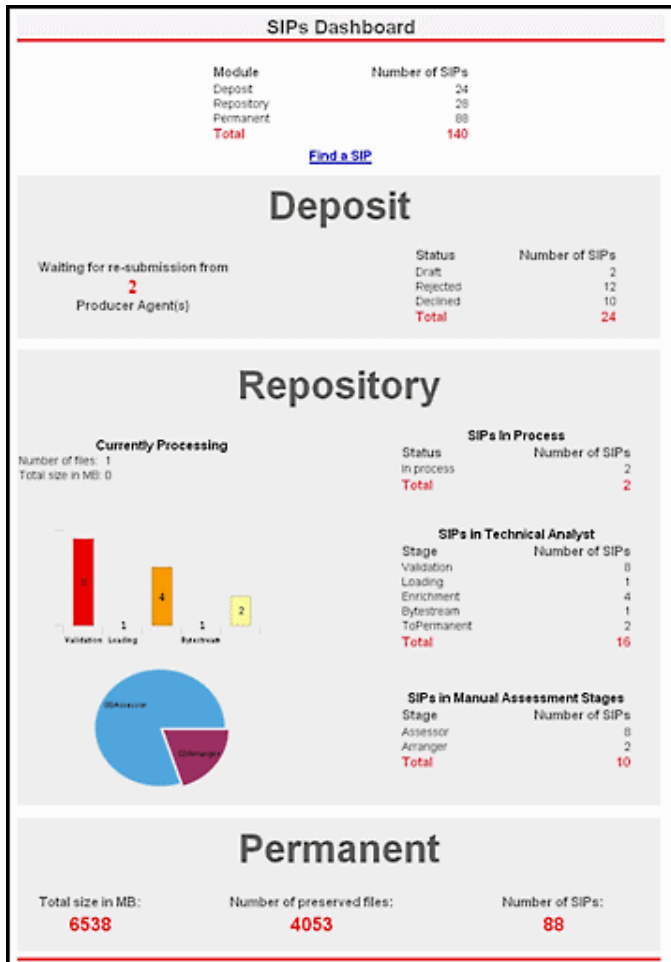
System Reports

All SIP stages and statuses are kept in the database for reporting and tracking purposes. Two system reports can be used to get this information:

- [SIPs Dashboard](#)
- [Find a SIP](#) (by SIP ID or by Deposit Activity ID)

SIPs Dashboard

Available from Submissions > Advanced Tools > Run Reports > SIPs Dashboard.



SIPs Dashboard Report

The SIP dashboard displays summary information about SIPs by module. Information includes the number of SIPs in various stages and statuses.

Find a SIP

Available from Submissions > Advanced Tools > Run Reports, the Reports List page allows you to view reports for SIPS based on SIP ID or deposit activity ID (see the Submissions Reports List Page below).



Deposits ▾	Submissions ▾	Data Management ▾	Preservation ▾
/ Submissions: Run Reports			
	Name	Description	
1	Find a SIP by Deposit Activity ID	SIP details by SIP ID by Deposit Activity ID	
2	Find a SIP by SIP ID	SIP details by SIP ID	
3	SIPs Dashboard	Breakdown of SIPs by module and stage	
4	Uploads Report (configurable date range)	List of Deposits by date range	

Submissions Reports List Page

From the Reports List page, click Find a SIP by SIP ID to return a report of a specific SIP. To return a report by deposit activity ID, click Find a SIP by Deposit Activity ID. Enter the SIP ID or the deposit activity ID into the Parameters field, and Rosetta returns the report on the Detail Report page (see the SIP Detail Report below).

SIP ID 950					
Module	Status	Stage			
Permanent	Finished	Finished			
SIP Details					
Submit Date	Mar 24, 2015, 10:27 AM	Producer Agent	admin1		
Owner	CRS00.INS00.DPR00	Approval Group ID	Unpublished		
Title	Title	Content Structure	SetOfFiles		
Material Type	LNP	Access Rights ID	AR_EVERYONE		
Producer	10000	Material Flow ID	2		
SIP Content					
Structure					
Entity	ID	Label			
Files					
ID	File Name	Size (KB)			
SIP History					
Event ID	Type	Description	Date	Time (Sec.)	Code
14441238	7	SIP ID 950 was generated	Mar 24, 2015, 10:26 AM	0.015	GENERATE_SIP_ID
14441242	18	Deposit Activity 9616 was submitted to the Staging Server as SIP ID 950	Mar 24, 2015, 10:27 AM	0.437	SIP_MOVED_TO_STAGING_SERVER
14441282	27	Fixity check was performed successfully for file FL52646. Representation REP52645 IE IE52644 Copy ID.	Mar 24, 2015, 10:27 AM	0.354	PERFORM_FIXITY_CHECK_FOR_THE_FILE_S
14441287	27	Fixity check was performed successfully for file FL52646. Representation REP52645 IE IE52644 Copy ID.	Mar 24, 2015, 10:27 AM	0.016	PERFORM_FIXITY_CHECK_FOR_THE_FILE_S
14441293	27	Fixity check was performed successfully for file FL52646. Representation REP52645 IE IE52644 Copy ID.	Mar 24, 2015, 10:27 AM	0.624	PERFORM_FIXITY_CHECK_FOR_THE_FILE_S
14441321	166	Finished Validation Stack Stage for SIP 950	Mar 24, 2015, 10:27 AM	2.448	COMPLETED_VALIDATION_STACK_STAGE
14441384	48	The Assessor decided to approve the SIP for further processing	Mar 24, 2015, 10:37 AM	0.682	ASSESSOR_APPROVE_SIP
14441387	218	Finished MD Validation Stage for SIP 950	Mar 24, 2015, 10:37 AM	0.314	SIP_ENDED_PRE_ENRICHMENT_STAGE
14441394	72	The System succeeded moving SIP 950 to the Permanent Repository	Mar 24, 2015, 10:38 AM	3.868	COMPLETED_MOVING_SIP_CONTENT_TO_PERMANENT_REPOSITORY
16951349	27	Fixity check was performed successfully for file FL52646. Representation REP52645 IE IE52644 Copy ID.	May 13, 2016, 12:33 PM	0.14	PERFORM_FIXITY_CHECK_FOR_THE_FILE_S
16951361	27	Fixity check was performed successfully for file FL52646. Representation REP52645 IE IE52644 Copy ID.	May 13, 2016, 12:33 PM	0.135	PERFORM_FIXITY_CHECK_FOR_THE_FILE_S
16951336	27	Fixity check was performed successfully for file FL52646. Representation REP52645 IE IE52644 Copy ID.	May 13, 2016, 12:33 PM	0.108	PERFORM_FIXITY_CHECK_FOR_THE_FILE_S

SIP Detail Report

The SIP detail report provides general information about SIP module, status, and stage. The report also displays data about the SIP's files, structure, content, and history, among other things.

SIP Processing Flow

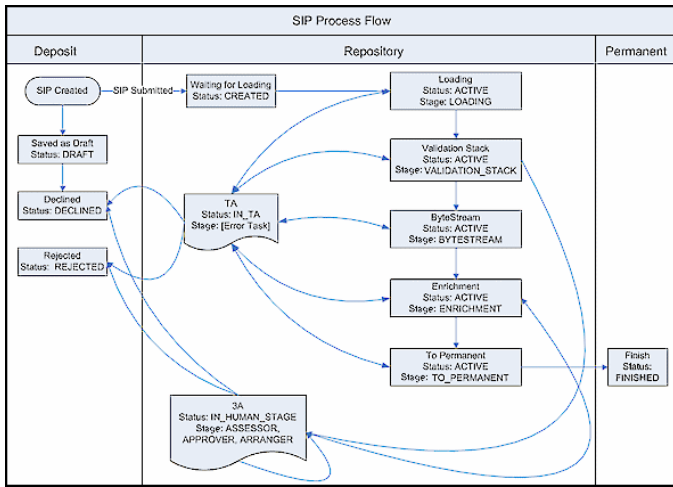
The following diagram illustrates the different statuses and stages of a SIP and the applicable transitions between them during SIP Processing:



https://knowledge.exlibrisgroup.com/Rosetta/Product_Documentation/Rosetta_Staff_Users_Guide/Introduction/Submission_In...

Updated: Wed, 06 Mar 2024 10:26:14 GMT

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SIP Process Flow Diagram

The stage is updated after a process has been completed, so a SIP in the "Loading" stage has actually completed loading and is waiting for the validation stack.



Deposit Managers

This page was not added to the PDF due to the following tag(s): article:topic-guide



Understanding Deposit Managers

Deposit Managers are responsible for configuring generic Producer profiles and generic material flows. (For more information on Producer profiles and material flows, see the Rosetta Overview Guide.)

- Deposit Managers accomplish their tasks by managing the following components:
- Producer profile's deposit control settings (For more information, see [Configuring Deposit Control Settings](#).)
- Metadata forms (For more information, see [Configuring Metadata Forms](#).)
- Material flow infrastructure (For more information, see [About Configuring Material Flow Infrastructure](#).)
- Generic material flows (For more information, see [Managing Generic Material Flows](#).)
- Generic Producer profiles (For more information, see [Managing Generic Producer Profiles](#).)
- Material flows associated with a Producer profile (For more information, see [Managing Material Flows Associated with a Producer Profile](#).)

Generic Producer profiles and material flows are automatically assigned to all Producers when they register in the Rosetta system. The profiles can be personalized at a later point in time by a Negotiator in order to meet the needs of specific Producers. (For more information on Negotiators, see [Understanding Negotiators](#).)

Deposit Managers are assigned by a User Manager, who registers them and defines their access. Privileges can be either Typical (without delete privileges) or Full (with edit and delete privileges).

Deposit Managers' scope is institutional.

The Deposit Manager can be assigned a role that gives access to all elements of the Deposit module with edit and delete privileges or a role that allows access only to commonly used deposit elements without edit and delete privileges. The following pages and fields are available only to the Deposit Manager Full role, but not the Deposit Manager Typical role:

- The following fields on the Producer page:
 - Classification
 - Producer Type
 - Local Producer Field 1
- The Default Sampling Rate field on the Producer Profiles page
- The following fields on the Material Flows page:
 - Internal
 - Sampling Rate
- The following pages:
 - Producer Groups
 - 1st Time Registration Rules
 - 1st Time Registration Reasons



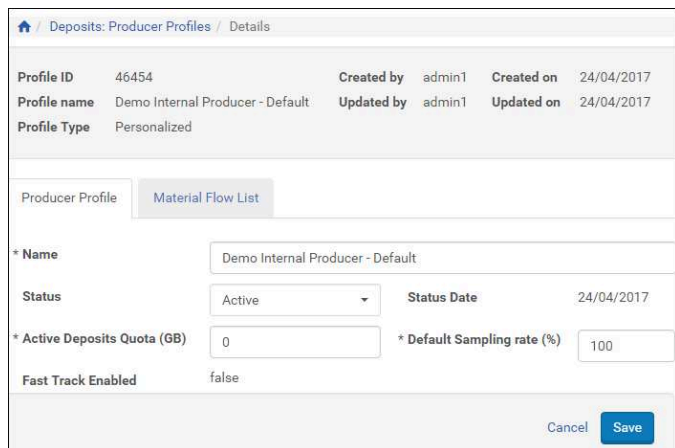
Configuring Deposit Control Settings

Deposit Managers can configure deposit control settings for generic Producer profiles. These settings include the following parameters:

- The Producer's deposit quotas
- The amount of content to be reviewed by staff users

To configure deposit control settings:

1. On the Management Home page, from the main menu, select Deposits > Producers and Agents > Producer Profiles. The List of Producer Profiles is displayed.
2. Locate the Producer profile with which you want to work and click Update. The Update Producer Profile page opens



The screenshot shows the 'Update Producer Profile' page in a web application. The breadcrumb trail is 'Deposits: Producer Profiles / Details'. The profile information is as follows:

Profile ID	46454	Created by	admin1	Created on	24/04/2017
Profile name	Demo Internal Producer - Default	Updated by	admin1	Updated on	24/04/2017
Profile Type	Personalized				

Below this is a tabbed interface with 'Producer Profile' selected. The form fields are:

- * Name: Demo Internal Producer - Default
- Status: Active (dropdown menu)
- Status Date: 24/04/2017
- * Active Deposits Quota (GB): 0
- * Default Sampling rate (%): 100
- Fast Track Enabled: false

At the bottom right, there are 'Cancel' and 'Save' buttons.

Update Producer Profile Page

3. In the Name field, enter the name of the Producer profile.
4. In the Status drop-down list, select one of the following:
 - Active, when you want to begin using the profile immediately (for example, to associate the profile with a Producer and allow Producer Agents to deposit content)
 - Inactive, when you want to complete profile configuration and begin using the profile later
5. In the Active Deposit Quotas (GB) field, enter the number of gigabytes that the producer can deposit simultaneously. Set to 0 for no limit.
6. In the Fast Track Enabled drop-down list, select No.
7. In the Disk Usage Quota field, enter the total disk space that is available to Producer Agents associated with the Producer.



8. In the Default Sampling Rate field, enter the percentage of the Producer Agent's content that needs to be reviewed by staff users as follows:
 - 100% - All deposited content must be reviewed by Assessors and Arrangers.
 - Any value less than 100% - The specified percentage of content must be reviewed by an Approver.
 - Sampling rates for specific Producers are defined by a Negotiator. For more information, see [Personalizing Producer Profiles](#).
 - This value takes effect only if the sampling rate on the material flow is not set and the SIP processing rule approval is set to Approver.
9. Click Save
Producer Agents associated with the Producer can deposit content as specified in the deposit control settings.



Configuring Metadata Forms

About Configuring Metadata Forms

Deposit Managers configure metadata forms as one of the main components of a material flow. After these forms are configured, a Deposit Manager can use them in a material flow in combination with additional components (such as submission formats and access rights policies). Each form or component can be associated with multiple material flows. (See [About Configuring Material Flow Infrastructure](#)) Metadata forms contain fields that Producer Agents must complete when depositing content. Deposit Managers work with metadata forms using the List of Metadata Forms page (see [Accessing the List of Metadata Forms Page](#)). The following activities can be performed from this page:

- [Adding a Metadata Form](#)
- [Previewing a Metadata Form](#)
- [Duplicating a Metadata Form](#)
- [Viewing Material Flows Associated with the Metadata Form](#)
- [Updating a Metadata Form](#)
- [Deleting a Metadata Form](#)

Accessing the List of Metadata Forms Page

The List of Metadata Forms page enables Deposit Managers to view the existing metadata forms and create new metadata forms. To access the List of Metadata Forms page, from the Rosetta drop-down menu, click Deposits > Deposit Arrangements > Metadata Form. The List of Metadata Forms page opens:

Name	Material Flow	Template	Created On	Updated On	View	Update	Preview	Duplicate
1 Copy of One-Off	Associated Material Flows	Generic	24/04/2017 14:55:08	24/04/2017 14:55:08	View	Update	Preview	Duplicate
2 Copy of One-Off	Associated Material Flows	Generic	25/04/2017 01:46:26	25/04/2017 01:46:26	View	Update	Preview	Duplicate
3 Copy of One-Off	Associated Material Flows	Generic	24/04/2017 15:25:21	24/04/2017 15:25:21	View	Update	Preview	Duplicate
4 Copy of One-Off	Associated Material Flows	Generic	24/04/2017 15:21:20	24/04/2017 15:21:20	View	Update	Preview	Duplicate
5 Copy of One-Off	Associated Material Flows	Generic	24/04/2017 15:15:38	24/04/2017 15:15:38	View	Update	Preview	Duplicate
6 Copy of One-Off	Associated Material Flows	Generic	24/04/2017 15:12:10	24/04/2017 15:12:10	View	Update	Preview	Duplicate
7 Copy of One-Off	Associated Material Flows	Generic	24/04/2017 15:09:32	24/04/2017 15:09:32	View	Update	Preview	Duplicate
8 Copy of One-Off	Associated Material Flows	Generic	24/04/2017 15:07:44	24/04/2017 15:07:44	View	Update	Preview	Duplicate
9 Copy of One-Off	Associated Material Flows	Generic	24/04/2017 14:57:35	24/04/2017 14:57:35	View	Update	Preview	Duplicate
10 Copy of Unpublisher	Associated Material Flows	Generic	24/04/2017 19:08:15	24/04/2017 19:08:15	View	Update	Preview	Duplicate



List of Metadata Forms Page

The List of Metadata Forms page displays columns containing the following information:

List of Metadata Forms Page Columns

Column	Description
Name	The name of the metadata form
Material Flow	<ul style="list-style-type: none">The name of the material flow when the metadata form is associated with only one material flowThe Associated Material Flows link when the metadata form is associated with multiple material flows
Template	The template used for the metadata form.
Created On/Update On	The date on which the metadata form was created or updated
Available action items (no heading)	<ul style="list-style-type: none">View the form's design and fieldsUpdate/edit the form's design and fieldsPreview the form as a Producer will see itDelete the form

Adding a Metadata Form

Deposit Managers can add a metadata form to provide Producer Agents with fields that they use to describe their content.

To add a metadata form:

1. On the List of Metadata Forms page (Deposits > Deposit Arrangements > Metadata Form), above the list of the metadata forms, click the Add Metadata Form button.
The Metadata Form Details page opens to the Design Information tab:



Metadata Form Details Page, Design Information Tab

2. In the Name field, enter a name (required) for the metadata form. Enter additional optional information on the Design Information tab.
3. When you are finished, click the Fields Information tab.
The page refreshes with a fields/properties table for entering new elements. No fields appear yet in the left column

Metadata Form Details Page, Fields Information Tab

4. Enter information for the new field in the form on the right. (Required fields are marked with an asterisk.)
 - Field Name is for system use and is not displayed to Producer Agents.
 - The Label field displays on the Producer Agent's form. To see the form as an Agent sees it, click the Preview button.
 - The DC Tag drop-down list contains the Dublin Core and DNX tags. Select the tag that corresponds to each label.
5. Click Save Field. The field label is displayed in the list of existing fields on the left.
You can edit an existing field at any time by clicking the field label in the list of fields on the left.
6. Click Save Form. The metadata form is saved to the Rosetta system.



- Repeat steps 4-5 to add more fields, as needed.
The metadata form is created

New Metadata Form with Fields

To enable Producer Agents to use the form, Deposit Managers must associate the metadata form with a material flow (see [Associating Material Flow Components with Material Flows](#)).

Adding Lists of Values to Metadata Forms

When a metadata form field requires a list of several predefined values for the user to select from, Deposit Managers can load these values from an Excel spreadsheet rather than entering them individually.

- Loading these values from Excel spreadsheets is only possible for subsystems in which creating new tables is allowed.
- The Excel spreadsheet must be formatted as two columns with the left column containing the labels for the drop-down list and the right column containing the code corresponding to each value.
- Only use Excel files with the .xsl extension (.xlsx returns an error message).
- Name the spreadsheet CodeTable.
- Name the left column Code and the right column Description.
- Before you perform the following procedure, make sure your Excel data references fields of the type radio button, check box, and/or drop-down list where the code table name is locally defined.

To load a list of values from an Excel spreadsheet:

- If you have not done so already, add a field to your metadata form that requires the drop-down list for which you have an Excel spreadsheet with a formatted list of values (labels and codes).
- Enter properties for all required fields and any optional fields.
- For the Type field, select ComboField from the drop-down menu.
The page reloads with an additional Options Fields section below the fields section.



Metadata Form for New ComboField

4. In the Code Table Name field, select Locally Defined. This tells the system that you will be loading your own defined values for the drop-down field.
5. Click the Import button.
An upload form opens:

Upload Form for Excel File

6. Browse to the Excel file containing the list of field-value pairs.
7. Click the Import button.
The system loads the data and displays it in a list for you to view and confirm.
8. Click the Import button if the codes match the values you want and the description contains the name of the value. (Otherwise, click the Cancel button and adjust your Excel file.)
The code table field and values display in the Options Fields section of the Update Form.
Once you have imported Excel data, you will see an Export button beside the Import button. You can use this to download an Excel file and edit values on your PC, then import the file again.
9. Adjust the list as needed by deleting any rows (click the corresponding Delete text) or by adding an option manually (enter text in the Label and Value fields below the list and click the Add New Option button).
10. Click the Preview button to see how the field displays in the final form. Use the Back button to return to editing the page.
11. When the form appears the way you want it, click the Save Form button.
The system implements your edits and returns you to the List of Metadata Forms.



Generic Lists of Values

Predefined lists of values for use in drop-down fields, radio buttons, and check boxes are available to Rosetta metadata forms as generic code tables. These tables can be accessed from the Metadata Forms page.

To use generic code tables for creating multi-value fields:

1. Follow the instructions for adding a list of values to a metadata form's drop-down list. (See [Metadata Form for New ComboField](#)).
2. For the Type field, enter ComboField.
The page refreshes with the Code Table Name drop-down field available.
3. Select one of the generic code tables from the Code Table Name drop-down menu.
4. Click the Save button.
The new values are added to the metadata form and made available to the user in the relevant drop-down field.

Working with Metadata Forms

From the List of Metadata Forms, Deposit Managers can perform the following actions:

- [Previewing a Metadata Form](#)
- [Duplicating a Metadata Form](#)
- [Updating a Metadata Form](#)
- [Deleting a Metadata Form](#)
- [Viewing Material Flows Associated with the Metadata Form](#)

Previewing a Metadata Form

Deposit Managers can preview how the metadata form is displayed to Producer Agents.

To preview a metadata form:

On the List of Metadata Forms page (see [Accessing the List of Metadata Forms Page](#)), locate the metadata form that you want to preview and click Preview. The Preview Metadata Form page opens.

To return to the List of Metadata Forms page, click Save.

Duplicating a Metadata Form

Deposit Managers can duplicate a metadata form. This is especially helpful when creating a new form. It is often faster to duplicate an existing metadata form and modify it than to create a new metadata form.

To duplicate a metadata form:

On the List of Metadata Forms page (see [Accessing the List of Metadata Forms Page](#)), locate the metadata form you want to duplicate and click Duplicate. The Rosetta system creates a copy of the form.

An exact copy of the metadata form is added to the List of Metadata Forms page. The Rosetta system automatically labels the new metadata form with the name Copy of followed by the name of the original metadata form.

Updating a Metadata Form

Deposit Managers can update metadata form details at any time. For example, a Deposit Manager can add new fields or specify a mandatory field.

To update a metadata form:



1. On the List of Metadata Form page (see [Accessing the List of Metadata Forms Page](#)), locate the metadata form that you want to update and click Update. The Update Metadata Form Details page opens.
2. Modify the fields as required.
3. To save your changes and return to the List of Metadata Forms page, click Save. The List of Metadata Forms page opens.
The metadata form details are updated.

Deleting a Metadata Form

A Deposit Manager can delete a metadata form when it is not being used by any Producers and the Deposit Manager does not want to maintain the metadata form.

Deposit Managers cannot delete a metadata form when a Producer Agent is using it to deposit content. Deposit Managers can delete the metadata form only after the deposit process is complete and no other Producer Agent is using the metadata form.

To delete a metadata form:

1. On the List of Metadata Forms page (see [Accessing the List of Metadata Forms Page](#)), locate the metadata form you want to delete and click More. Additional options are displayed.
2. Click Delete. The confirmation page opens.
3. Click OK. The metadata form is removed from the list.

The metadata form is removed from the Rosetta system. Producer Agents can no longer use this metadata form when depositing content.

Viewing Material Flows Associated with the Metadata Form

Deposit Managers can view the material flows that are associated with the metadata form.

To view the material flows:

On the List of Metadata Forms page (see [Accessing the List of Metadata Forms Page](#)), locate the metadata form for which you want to view the material flows and click one of the following:

- The Associated Material Flows link, when multiple material flows are associated with the metadata form.
- The name of the material flow, when a single material flow is associated with the metadata form.

The List of Material Flows page opens. The page displays columns containing the information described in the [Accessing the List of Material Flows Page](#). You cannot update the material flow details.

To return to the List of Metadata forms page, click Save.



Configuring Material Flow Infrastructure

- [About Configuring Material Flow Infrastructure](#)
- [Configuring Submission Formats](#)
- [Configuring Content Structures](#)
- [Working with Configuration Files](#)
- [Configuring Metadata Profiles](#)
- [Associating Material Flow Components](#)



About Configuring Material Flow Infrastructure

About Configuring Material Flow Infrastructure

Deposit Managers can configure the following components of a material flow:

- Metadata forms (see previous section, [Configuring Metadata Forms](#))
- Submission formats (see [Configuring Submission Formats](#))
- Content structures (see [Configuring Content Structures](#))
- Copyright boilerplate statements (see [Configuring Copyright Boilerplate Statements](#))
- Access rights policies (see [Access Rights](#))
- Retention policies (see [Retention Policies](#))

After these components are configured, a Deposit Manager can use them in a material flow. Each component can be associated with multiple material flows.

Generic material flow infrastructure configured by a Deposit Manager can be personalized by a Negotiator for the needs of specific Producers (see [Personalizing Producer Profiles](#)).



Configuring Submission Formats

Configuring Submission Formats

Submission formats govern how Producer Agents upload files and what limitations are applied to these files. Deposit Managers work with submission formats using the List of Submission Formats page (see [Accessing the List of Submission Formats Page](#)). The following activities can be performed using this page:

- [Adding an HTTP Load or Bulk Submission Format](#)
- [Adding a Detailed Submission Format](#)
- [Adding an Automated Submission Format for Deposit Through FTP/SFTP](#)
- [Adding an Automated Submission Format for Deposit Through NFS](#)
- [Adding an S3 Submission Format](#)
- [Viewing Submission Format Details](#)
- [Duplicating a Submission Format](#)
- [Viewing Material Flows Associated with a Submission Format](#)
- [Updating a Submission Format](#)
- [Deleting a Submission Format](#)

Accessing the List of Submission Formats Page

The List of Submission Formats page enables Deposit Managers to view, activate, duplicate, and delete existing submission formats. In addition, Deposit Managers can use this page to add new submission formats.

To access the List of Submission Formats page, follow the Rosetta rollover menu path: Deposits > Deposit Arrangements > Submission Format

The List of Submission Formats page opens (see below).

Name	Material Flow	Description	File definition	Template				
1 Detailed CSV	No Associated Material Flows	Comma Separated Values...	Detailed CSV	Generic	View			
2 Internal NFS	Associated Material Flows	NFS Acquiring	NFS	Generic	View	Update	Duplicate	Delete
3 Published.General	Associated Material Flows	Basic HTTP file upload	Http Load	Generic	View	Update	Duplicate	Delete
4 Unpublished.General	Associated Material Flows	Unpublished HTTP load	Http Load	Generic	View	Update	Duplicate	Delete

List of Submission Formats

The page displays columns containing the following information:



List of Submission Formats Page Columns

Column	Description
Name	The name of the submission format.
Material Flow	<ul style="list-style-type: none">• The name of the material flow, if the submission format is associated with only one material flow• The Associated Material Flows link, if the submission format is associated with multiple material flows
Description	A short description of the submission format.
File Definition	The file upload method: Http Load, Detailed, Bulk, FTP/SFTP, or NFS.
Template	The submission format type: Generic or Personalized.

Adding an HTTP Load or Bulk Submission Format

The HTTP load and bulk submission formats limit the file types as well as the total size and number of files that Producer Agents can upload. (For more information on submission formats, see **Configuring Material Flow Infrastructure** in the Rosetta Overview Guide.)

To allow Producer Agents to upload one file at a time, Deposit Managers must add one of the HTTP load formats. To allow Producer Agents to perform bulk submissions while applying the same general restrictions, Deposit Managers must add a bulk submission format.

The user interface for configuring the submission format is almost the same for HTTP load and bulk formats.

To add an HTTP load or bulk submission format:

1. Access the List of Submission Formats page (see [Accessing the List of Submission Formats Page](#)).
2. Above the submission formats list, in the Add Submission Format drop-down list, select:
 - HTTP load, when you want to add a submission format for an individual file
 - Bulk, when you want to add a submission format for a multi-file/bulk upload (Aurigma licensed users only)
3. Click Add. The Submission Format Editor page opens.



Deposits ▾ Submissions ▾ Data Management ▾ Preservation ▾

Home / Deposits: Submission Format / Details

Name - ID - Created on 14/05/2017

Created by admin1 Definition Type HDpSubmissionFormatGeneral Updated on 14/05/2017

Updated by admin1

Submission Format Details

* Name

Description

Max. Number of Files Min. Number of Files

* Max File size (MB) File Location

Selected File Extensions

3dm	+
3ds	+
3gp	+
3gpp	+
3mf	+
7z	+
8svx	+

HTTP Load or Bulk Submission Format Editor Page

4. Provide the information as requested.
Fields marked with an asterisk (*) are required.
5. Provide allowed extensions for your individual, non-bulk files.
 - a. In the File Extensions list box, select the file extensions of the file types that the Producer Agents are allowed to deposit.
 - b. Click the Right arrow. The selected extensions moves to the Selected File Extensions list.
 - c. Repeat a) and b) until you have selected all the extensions you want. (Alternately, to select all extensions, click the double-arrow button between the two boxes.)
6. To save the submission format and return to the List of Submission Formats page, click Save.

The new format is saved in the Rosetta system. It does not have associated material flows. To enable Producer Agents to use the submission format for uploading content, Deposit Managers must associate the submission format with a material flow (see [Associating Material Flow Components with Material Flows](#)).

Adding a Detailed Submission Format

The detailed submission format specifies the number and type of files that can be uploaded as well as the maximum file size of each file type. (For more information about submission formats, see **Configuring Material Flow Infrastructure** in the Rosetta Overview Guide.)

Deposit Managers can add the detailed submission format to apply detailed restrictions on individual files that Producer Agents upload. For example, a Deposit Manager can specify the number of files of each type (by adding one file of a particular type for every file the user should be able to upload of the same type), and limit the size of the file for each addition.

To add a detailed submission format:

1. On the List of Submission Formats page (see [Accessing the List of Submission Formats Page](#)), in the Add Submission Format drop-down list, select Detailed.
2. Click Add. The Detailed Submission Format Editor page opens.



Detailed Submission Format Editor Page

3. In the General Information pane, provide the general information as requested.
4. In the File Details pane, click Add File. The Add File Details page opens.

Add File Details Page

5. Enter a File Descriptor value and change any of the default values in the other fields.
6. In the File Extensions list box, select the file extensions of the file types that the Producer Agents can deposit.
7. Click the Right arrow. The selected extensions are displayed in the Selected File Extensions list.

To select multiple extensions, hold **CTRL** while selecting the extensions.

8. Click Save. The Detailed Submission Format Editor page opens.
9. Click Save again. The detailed submission format is added to the Rosetta system.

To enable Producer Agents to use the submission format for uploading content, Deposit Managers must associate the submission format with a material flow (see [Associating Material Flow Components with Material Flows](#)).



Adding an Automated Submission Format for Deposit Through FTP/SFTP

Deposit Managers can configure an automated submission format to upload files from a predefined location on a Producer Agent's server to the Rosetta system. The Rosetta system uploads content through FTP/SFTP. To add an automated submission format for deposit through FTP/SFTP:

1. On the List of Submission Formats page (see [Accessing the List of Submission Formats Page](#)), in the Add Submission Format drop-down list, select FTP or SFTP.
2. Click Add. The Submission Format Editor page opens.

Deposits Submissions Data Management Preservation

Deposits: Submission Format / Details

Name	-	ID	-	Created on	15/05/2017
Created by	admin1	Definition Type	HDpSubmissionFormatDpsFTP	Updated on	15/05/2017
Updated by	admin1				

Submission Format Details

* Name

Description

Max. Number of Files Min. Number of Files

* Server * Username

* Port * Password

Sub-directory Handling Method

Max File size (MB) Allow Navigation

Cancel Save

FTP/SFTP Automated Submission Format Editor Page

3. Complete the fields as described in the following table:

FTP/SFTP Automated Submission Format Editor Page Fields

Field	Description
Name	The name of the submission format.
Description	The description of the submission format.
Max.number of files	The maximum number of files that associated Producer Agents can deposit.
Handling method	Determines whether the files needs to be deleted from the server when the deposit process is finished: <ul style="list-style-type: none">• move - The files are uploaded to the Ex Libris Rosetta system and then deleted from the server.• copy - the files are uploaded to the Ex Libris Rosetta system and are not deleted from the server.



Field	Description
User name	The valid user name to access the files.
Password	The valid password to access the files.
Max.file size	The maximum file size that associated Producer Agents can deposit.
Min.number of files	The minimum number of files that associated Producer Agents must deposit.
Server	The host name of the server on which the files are located.
Port	The server port to be used to access the files.
Subdirectory	The location of the files on the server. A forward slash before a given path indicates that the path is absolute, while a path without a leading forward slash indicates that the sub-directory is relative to the FTP user's home directory. If Deposit Managers leave this field empty, the Rosetta system prompts the Producer Agent depositing content for the location.
Allow Navigation	Indicates whether the user can navigate to the SIP files located in the subfolders of the specified FTP/SFTP server. The following values are valid: <ul style="list-style-type: none"> • True – Navigation to SIP files in subfolders is allowed. • False – Navigation is not allowed and SIPs only in the FTP/SFTP server folder are available for deposit.

4. Click Save. The automated submission format is added to the Rosetta system.

To enable Producer Agents to use the submission format for uploading content, Deposit Managers must associate the submission format with a material flow (see [Associating Material Flow Components with Material Flows](#)).

Adding an Automated Submission Format for Deposit Through NFS

Deposit Managers can configure an automated submission format to upload files from a library's computer to the Rosetta system.

The Rosetta system uploads content through NFS.

To add an automated submission format for deposit through NFS:

1. On the List of Submission Formats page (see [Accessing the List of Submission Formats Page](#)), in the Add Submission Format drop-down list, select NFS.
2. Click Add. The Submission Format Editor page opens.



NFS Automated Submission Format Editor Page

3. Complete the fields as described in the following table:

The NFS Automated Submission Format Editor Page Fields

Field	Description
Name	The name of the submission format.
Description	The description of the submission format.
Handling method	<p>Determines whether the files needs to be deleted from the server when the deposit process is finished:</p> <ul style="list-style-type: none"> • move – the files are uploaded to the Ex Libris Rosetta system and then deleted from the server. • copy – the files are uploaded to the Ex Libris Rosetta system and are not deleted from the server. • soft link – a link to the files is created in the Ex Libris Rosetta system, but the files remain on the server.
NFS Path	The path of the files to be uploaded from a local computer.
Sub-directory	<p>The location of the files on the computer.</p> <p>If the Deposit Managers leave this field empty, the Rosetta system prompts the Producer Agent depositing content for the location.</p>
Min.Number of files	The minimum number of files that associated Producer Agents must deposit.



Field	Description
Allow Navigation	<p>Indicates whether the user can navigate to the SIP files located in the subfolders of the specified NFS path. The following values are valid:</p> <ul style="list-style-type: none"> • True – Navigation to SIP files in subfolders is allowed. • False – Navigation is not allowed and SIPs only in the NFS path folder are available for deposit.
Max.number of files	The maximum number of files that associated Producer Agents can deposit.
Max.file size (MB)	The maximum file size that associated Producer Agents can deposit.
File Extensions	The list of available extensions.
Selected File Extensions	The list of extensions that were selected from the File Extensions list box.

4. In the File Extensions list box, select the file extensions of the file types that the Producer Agents can deposit.
5. Click the Right arrow. The selected extensions are displayed in the Selected File Extensions list.

To select multiple extensions, hold **CTRL** while selecting the extensions.

6. Click Save. The automated submission format is added to the Rosetta system.

To enable Producer Agents to use the submission format for uploading content, Deposit Managers must associate the submission format with a material flow (see [Associating Material Flow Components with Material Flows](#)).

Adding an S3 Submission Format

Deposit Managers can configure an S3 submission format to support depositing from a source that implements the S3 protocol.

To add an S3 submission format:

1. On the List of Submission Formats page (see [Accessing the List of Submission Formats Page](#)), in the Add Submission Format drop-down list, select S3.
2. Click Add. The Submission Format Editor page opens.



Deposits: Submission Format / Details

Name	-	ID	-	Created on	05/12/2022
Created by	admin1	Definition Type	HDpSubmissionFormatDpsS3	Updated on	05/12/2022
Updated by	admin1				

Submission Format Details

* Name

Description

Handling Method Copy Move

Endpoint * Bucket name

Region * Maximum waiting time (Milliseconds)

* Access Key ID * Secret Access Key

S3 Path (Prefix) Max File size (MB)

Max. Number of Files Min. Number of Files

File Extensions

0 items selected	Remove all		Add all
		Std	+ -
		000	+ -
		123	+ -
		3dd	+ -
		3dm	+ -
		3dmf	+ -
		3ds	+ -

Cancel Save

S3 Submission Format Editor Page

3. Complete the fields as described in the following table:

S3 Submission Format Editor Page Fields

Field	Description
Access Key ID	The S3 Access Key ID
Bucket Name	The S3 Bucket Name
Description	The submission format description
Endpoint	The S3 endpoint for accessing
File Extensions	The file extensions that the Producer Agents can deposit
Handling Method	How to handle the deposited files at the source
Max File Size (MB)	The maximum file size that associated Producer Agents can deposit
Max. Number of Files	The maximum number of files that associated Producer Agents can deposit
Maximum Waiting Time (Milliseconds)	The waiting time in milliseconds before timing out a call



Field	Description
Min. Number of Files	The minimum number of files that associated Producer Agents must deposit
Name	The submission format name
Region	The S3 Region
S3 Path (Prefix)	The S3 path (or prefix) of the deposit files
Secret Access Key	The S3 Secret Access Key

4. Click Save. The S3 submission format is added to the Rosetta system.

To enable Producer Agents to use the submission format for uploading content, Deposit Managers must associate the submission format with a material flow (see [Associating Material Flow Components with Material Flows](#)).

Viewing Submission Format Details

Deposit Managers can view the submission format details, such as the name, description, and settings for files that Producer Agents can upload.

Deposit Managers cannot update the details while viewing them.

To view the submission format details:

On the List of Submission Formats page (Deposits > Producers and Agents > Advanced Tools > Submission Format), locate the submission format you want to view and click View. The View Submission Format Details page opens.

For a description of the fields on this page, see [List of Submission Formats](#) on page.

Duplicating a Submission Format

Deposit Managers can duplicate a submission format. This is especially helpful when creating a new submission format. It is often faster to duplicate an existing submission format and then modify it, than to create a new submission format.

To duplicate a submission format:

On the List of Submission Formats page (Deposits > Deposit Arrangements > Metadata Form), locate the submission format you want to duplicate and click Duplicate. The Rosetta system creates a copy of the format.

An exact copy of the submission format is added to the List of Submission Formats page. The Rosetta system automatically labels the new submission format with the name Copy of followed by the name of the original submission format.

Viewing Material Flows Associated with a Submission Format

Deposit Managers can view the material flows that are associated with a submission format.

To view the material flows:

On the List of Submission Formats page (see [Accessing the List of Submission Formats Page](#)), locate the submission format for which you want to view the material flows and click the Associated Material Flows link.

The List of Material Flows Per Submission Format page opens. The page displays columns containing the information described in [Accessing the List of Submission Formats Page](#). You cannot update the material flow details.

To return to the List of Submission Formats page, click Save.



Updating a Submission Format

Deposit Managers can update submission format details at any time. For example, a Deposit Manager can specify additional file types or change the number of files that Producer Agents can deposit.

To update a submission format:

1. On the List of Submission Formats page (Deposits > Deposit Arrangements > Submission Format) locate the submission format that you want to update and click Update. The Update Submission Format Details page opens.
2. Modify the fields as required.
3. To save your changes and return to the List of Submission Formats page, click Save. The List of Submission Formats page opens.

The submission format details are updated.

Deleting a Submission Format

A Deposit Manager can delete a submission format when it is not being used by any Producers and the Deposit Manager does not want to maintain the submission format.

Deposit Managers cannot delete a submission format when a Producer Agent is using it to deposit content. Deposit Managers can delete the submission format only after the deposit process is complete and no other Producer Agent is using the submission format.

To delete a submission format:

1. On the List of Submission Formats page (Deposits > Deposit Arrangements > Submission Format), locate the submission format you want to delete and click More. Additional options are displayed.
2. Click Delete. The confirmation page opens.
3. Click OK. The submission format is removed from the list.

The submission format is removed from the Rosetta system. Producer Agents can no longer use this submission format when depositing content.



Configuring Content Structures

Configuring Content Structures

Content structures define the structure of the package that must be delivered to Rosetta in order to convert it to a Rosetta-compatible METS.

Deposit Managers work with content structures using the List of Content Structures page (see [Accessing the List of Content Structures Page](#)). The following activities can be performed using this page:

- [Adding a Content Structure](#)
- [Viewing Content Structure Details](#)
- [Duplicating a Content Structure](#)
- [Viewing Material Flows Associated with the Content Structure](#)
- [Updating a Content Structure](#)
- [Deleting a Content Structure](#)

Accessing the List of Content Structures Page

The List of Content Structures page enables Deposit Managers to view, activate, duplicate, and delete existing content structures. In addition, Deposit Managers can use this page to add new content structures.

To access the List of Content Structures page:

From the Rosetta drop-down menu, select Deposits > Deposit Arrangements > Content Structure. The List of Content Structures page opens.

Name	Type	Material Flow	Created On				
1 SoF.Simple	Set Of Files Converter	Associated Material Flows	14/05/2017 17:04:27	View	Update	Duplicate	Delete
2 SoF.Complex	Set Of Files Converter	Associated Material Flows	14/05/2017 17:04:27	View	Update	Duplicate	Delete
3 METS	METS Converter	Associated Material Flows	14/05/2017 17:04:27	View	Update	Duplicate	Delete
4 Dublin Core	Dublin Core Converter	Associated Material Flows	14/05/2017 17:04:27	View	Update	Duplicate	Delete
5 CSV	Comma Separated Converter	Associated Material Flows	14/05/2017 17:04:27	View	Update	Duplicate	Delete
6 BagIt	BagIt Converter	No Associated Material Flows	14/05/2017 17:04:27	View	Update	Duplicate	Delete

List of Content Structures Page

To narrow your view to a subset of what is shown, click the Filter drop-down arrow and select the type, class, or group you want to see. To find an existing structure, enter its name or type in the Find field, select an in: option, and click the Go button.

The table displays the following information:



List of Content Structures Page Columns

Column	Description
Name	The name of the content structure.
Type	The type of content structure.
Material Flow	<ul style="list-style-type: none">The name of the material flow, if the content structure is associated with only one material flowThe Associated Material Flows link, if the content structure is associated with multiple material flows
Created On	The date on which the content structure was created.

Adding a Content Structure

Deposit Managers can add a new content structure to define how metadata must be converted from its original format to one supported by Rosetta.

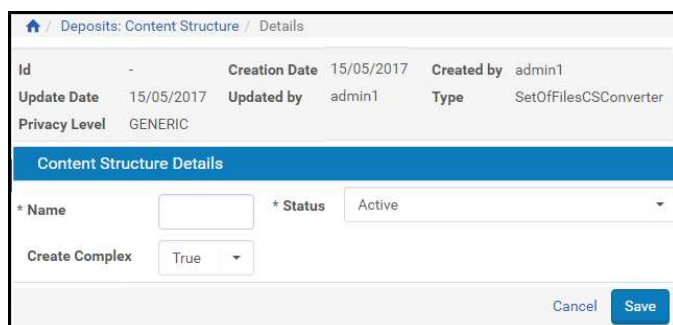
To add a content structure:

1. Access the List of Content Structures page (see [Accessing the List of Content Structures Page](#)).
2. In the Add Content Structure drop-down list, select the content structure to which the original format must be converted.
3. Click Add. The Content Structure Details page for that format converter opens.
4. Enter information in the fields for the format converter you selected. See [Set of Files Converter](#), [Dublin Core Converter](#), [XSL Converter](#), [BagIt Converter](#), [METS Converter](#), or [CSV Content Structure](#) for examples of each format.
5. Click Save. The content structure is saved in the Rosetta system.

To enable Producer Agents to use the content structure for uploading content, Deposit Managers must associate the content structure with a material flow (see [Associating Material Flow Components with Material Flows](#)).

Set of Files Converter

The Set of Files Converter is the simplest and quickest method to load content into Rosetta. Use this content structure for UI-based deposits and other non-structured content.



The screenshot shows a web form titled "Deposits: Content Structure / Details". It displays metadata for a content structure: Id is "-", Creation Date is "15/05/2017", Created by is "admin1", Update Date is "15/05/2017", Updated by is "admin1", and Type is "SetOfFilesCSConverter". The Privacy Level is "GENERIC". Below this is a section titled "Content Structure Details" with a blue header. It contains a form with a "* Name" field (empty), a "* Status" dropdown menu set to "Active", and a "Create Complex" dropdown menu set to "True". At the bottom right of the form are "Cancel" and "Save" buttons.

Content Structure Form: Set of Files



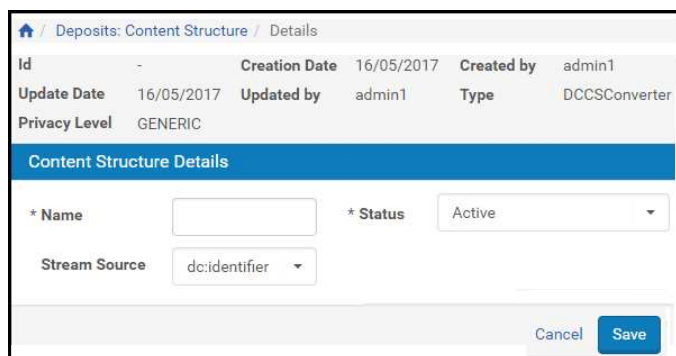
All fields except Name are populated with default values. Enter a name for the converter and review and change, if necessary, the default values, using the descriptions below.

- Name: The name of the content structure.
- Status: The status of the content structure, either Active or Inactive. If the content structure is Inactive, it cannot be used in a Material Flow.
- Create Complex: If set to true, Rosetta creates only one IE. Its one representation contains all of the files in the streams subfolder. If set to false, Rosetta creates separate IEs with one representation and one file for each file in the streams subfolder.
When selecting false, Rosetta moves the content of dc:title to dc:alternative, since the title is the same for each IE and copies the file name to dc:title, since it is unique.

Dublin Core Converter

The Dublin Core Converter is similar to the Set of Files Converter but it allows users to maintain a relation between specific metadata and filestreams. This is useful when you want to create multiple IEs with different metadata in one SIP.

A dc.xml file may contain multiple DC records. <record> elements can be nested in any root element (for example: <records>, <collection>, etc.).



The screenshot shows a web interface for configuring a 'Content Structure'. At the top, there is a breadcrumb trail: 'Deposits: Content Structure / Details'. Below this is a table with the following data:

Id	-	Creation Date	16/05/2017	Created by	admin1
Update Date	16/05/2017	Updated by	admin1	Type	DCCSConverter
Privacy Level	GENERIC				

Below the table is a section titled 'Content Structure Details' with a blue header. It contains three input fields:

- * Name: An empty text input field.
- * Status: A dropdown menu currently set to 'Active'.
- Stream Source: A dropdown menu currently set to 'dc:identifier'.

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

Content Structure Form: Dublin Core

- Name: The name of the content structure.
- Status: Should be set to active.
- Stream Source: The dc field that references files (one or more) to be ingested. File location is relative to the SIP's streams subfolder. Absolute NFS paths and HTTP references are also supported (URL must be a direct link to the binary file).

The list of available stream source fields can be edited from the Content Structure Stream Source code table in the administration UI.

XSL Converter

The XSL converter allows users to upload SIPs of any source format in an automated material flow. This is done by preparing deposits in XML format and creating an XSL file that can convert the input XML files to DC files. This format allows customers uploading files to Rosetta to enrich the IEs with metadata information without the need to create a full, valid Rosetta METS (only DC information can be provided along with the streams to be uploaded).



Deposits: Content Structure / Details

Id	-	Creation Date	16/05/2017	Created by	admin1
Update Date	16/05/2017	Updated by	admin1	Type	XSLCConverter
Privacy Level	GENERIC				

Content Structure Details

* Name * Status

Create Complex Stream Source

* Upload XSL File

XSL Content Structure Details

The XSL converter definitions are similar to the DC converter with the addition of the following fields:

- Create Complex: If this field is set to False, Rosetta creates one IE with one representation and one file for each file in the streams subfolder. If this field is set to True, Rosetta creates only one IE. Its one representation contains all of the files in the streams subfolder.
- Upload XSL File: The XSL file name including full path.

The file extension (.xsl) is validated by Rosetta at the time of creating the content structure's instance. The system performs steps as follows:

1. Using the XSL, it converts the input XML to DC format.
2. The system uploads the DC and stream file(s) based on the information in the converted DC.

BagIt Converter

The BagIt converter allows you to upload SIPs in BagIt format. This format consists of the following sections:

- Data – the digital files
- Manifest – contains a checksum with the relative path to the files that enables Rosetta to perform a validation on the files
- txt file – contains the MD tags of the BagIt data

The BagIt content structure form contains the following fields:



Deposits ▾ Submissions ▾ Data Management ▾ Preservation ▾

Home / Deposits: Content Structure / Details

Id 6 Creation Date 01/03/2017 Created by -
 Update Date 01/03/2017 Updated by admin1 Type BagItCSCConverter
 Privacy Level GENERIC

Content Structure Details

* Name * Status

Store Tags as Source Metadata

Tag File	Tag	Property	
6 bag-info.txt	External-Identifier	SIP - Identifier (DC)	Remove
7 bag-info.txt	Bagging-Date	SIP - Date (DC)	Remove
8 bag-info.txt	External-Description	SIP - Description (DC)	Remove
9 bag-info.txt	Source-Organization	SIP - Publisher (DC)	Remove

Tag File Tag * Property

BagIt Converter

- Store Tags as Source Metadata check box– select to convert tag files to source md (whether or not they are mapped)
- Tag File – the name of the txt file that contains the BagIt metadata tags
- Tag – the BagIt metadata tag to which you want to map the METS field
- Property – the METS field to which you want to map the BagIt metadata tag

METS Converter

The METS content structure form contains the following fields:

Home / Deposits: Content Structure / Details

Id - Creation Date 16/05/2017 Created by admin1
 Update Date 16/05/2017 Updated by admin1 Type METSCSConverter
 Privacy Level GENERIC

Content Structure Details

* Name * Status

METS Converter Form

- Name: The name of the content structure.
- Status: Should be set to active.

CSV Content Structure

The CSV Content Structure allows users to submit metadata in CSV format, along with file streams. Rosetta transforms each CSV row into an object (Collection, IE, Representation, File—depending on the Object type field). The CSV file should hold all the relevant information for creating the objects. This can include metadata about the SIP and can also be used to create new collections.



The CSV Content Structure can be used only in a material flow with system-defined Detailed CSV or NFS submission format. To use NFS, place the file under the streams directory and the CSV file under the content directory. If you use a zip file, they are decomposed automatically (with Submission Format validations).

The CSV Content Structure UI requires users to specify a CSV template, which determines the metadata fields depositors are required to fill. These templates are managed in the CSV Template UI, in the Producers section. For more information, see [CSV Templates](#).

The screenshot shows a web interface for updating a CSV Converter. At the top, there is a breadcrumb trail: "/ Deposits: Content Structure / Details". Below this is a table with the following data:

Id	-	Creation Date	16/05/2017	Created by	admin1
Update Date	16/05/2017	Updated by	admin1	Type	CSVCSConverter
Privacy Level	GENERIC				

Below the table is a section titled "Content Structure Details". It contains three fields:

- * Name: [Text input field]
- CSV Template: [Dropdown menu showing "CSV_Loader_Fields"]
- Generate CSV Option: [Dropdown menu showing "None", "Simple (one IE per file)", "Collections (Collection per node; IE per file)", and "Complex (one IE per deposit)"]

CSV Converter Update Page

The Generate CSV Option field enables staff users to allow Producer Agents to auto-generate a full CSV file that represents the structure of the uploaded file. According to the selected value, Producer Agents will be prompted to download an auto-generated CSV file once a file has been uploaded. They will then be able to save their deposit activity as a draft, conveniently edit the CSV file, add metadata for each object, and upload and submit at a later stage. The following options are available:

- None - no CSV auto-generation will be available.
- Simple - each file will become one IE.
- Collections - like simple, but with each node in the file becoming a collection.
- Complex - the entire deposit will become one IE.
 - A physical structure map will be created based on the order of the files in the CSV file. When using Complex, it may be advisable to use the Generate Logical Structmap enrichment task to maintain the file structure hierarchy.
 - When using Collections, a dcterms:is PartOf field must be added to the CSV mapping table so that sub-collections are created properly. Three additional fields may be added with the collection prefix:
 - collection.externalSystem
 - collection.externalId
 - collection.description
 - The externalSystem and externalId fields must be unique as a pair.

The Download CSV Template downloads a CSV file with all the mandatory fields defined in the selected mapping table. This can be provided to Producer Agents when auto-generation is set to None.



Home / Deposits: Content Structure / Details

Id	5	Creation Date	16/05/2017	Created by	-
Update Date	16/05/2017	Updated by	admin1	Type	CSVCSConverter
Privacy Level	GENERIC				

Content Structure Details

Name	CSV
CSV Template	CSV_Loader_Fields
Generate CSV Option	Complex (one IE per deposit)

Download CSV Template Cancel

Download CSV Template

CSV Templates

For information specific to CSV templates for structural IEs, see **CSV Format for Structural IEs** of the Rosetta Producer's Guide.

CSV templates include a list of mandatory metadata fields that must be part of a deposited csv file. This list populates the CSV Template drop-down list in the CSV Content Structure UI. From the Rosetta drop-down menu, select Deposits > Deposit Arrangements > CSV Templates.

Home / Deposits: CSV Templates / Details

Template Details

Name	CSV_Loader_Fields				
Description	Default CSV Template				
Created By:	admin1	Created on:	17/05/2017 12:46:21		
Updated By:	admin1	Last Update on:	17/05/2017 12:46:21		

Metadata Fields

SIP	Title (DC)
Collection	-
IE	Title (DC)
REP	Preservation Type
File	File Original Name, File Original Path

Cancel

CVS Template – View



Deposits: CSV Templates / Details

Template Details

* Name: CSV_Loader_Fields
 Description: Default CSV Template
 Created By: admin1 Created on: 17/05/2017 12:46:21
 Updated By: admin1 Last Update on: 17/05/2017 12:46:21

Metadata Fields

Category	Selected	Remove all	Add all	Field List	Automatically added
SIP	1 items selected	Remove all	Add all	<ul style="list-style-type: none"> Title (DC) Abstract (DCTERMS) Access Rights (DCTERMS) Accrual Method (DCTERMS) Accrual Periodicity (DCTERMS) Accrual Policy (DCTERMS) Alternative (DCTERMS) Audience (DCTERMS) 	
Collection	0 items selected	Remove all	Add all	<ul style="list-style-type: none"> Abstract (DCTERMS) Access Rights (DCTERMS) Accrual Method (DCTERMS) Accrual Periodicity (DCTERMS) Accrual Policy (DCTERMS) Allow Navigation Alternative (DCTERMS) 	Automatically added (when generating collections): Title (DC), Is Part Of (DCTERMS)
IE	1 items selected	Remove all	Add all	<ul style="list-style-type: none"> Title (DC) Abstract (DCTERMS) Access Rights (DCTERMS) Access Rights Policy ID (IE) Accrual Method (DCTERMS) Accrual Periodicity (DCTERMS) Accrual Policy (DCTERMS) Alternative (DCTERMS) 	
REP	1 items selected	Remove all	Add all	<ul style="list-style-type: none"> Preservation Type Access Rights Policy ID (REP) Content Type Delivery Priority Derived From Id Digital Original Hardware Used Ordering Sequence 	
File	0 items selected	Remove all	Add all	<ul style="list-style-type: none"> Composition Level CRC32 Creating Application Extension Creating Application Name Creating Application Version Date Created By Application FILE - Abstract (DCTERMS) 	Automatically added: File Original Path, File Original Name

Cancel Save

CVS Template – Edit

The mandatory metadata fields include both system-level mandatory fields and user-level mandatory fields. System level mandatory fields include:

- File Original Name - File name (should be left empty when using HTTP/FTP)
- File Original Path - Absolute path to file (should be left empty when files are under SIP streams directory) or URL
- Collection dc:title and dcterms:IsPartOf (when generating collections)

User-level mandatory fields can include additional fields the library may require (such as an IE dc:creator field). System mandatory fields are visible on the right and cannot be changed. To add or remove a user-level mandatory field, simply drag and drop the requested field in the multi-select widget.

- Collection-level mandatory fields are relevant only if the selected CSV content structure is configured to use collections (Generate CSV Option=Collections).
- Preservation Type field default value is Preservation Master.



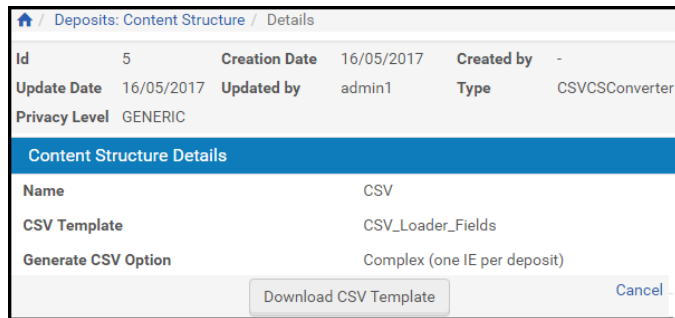
Viewing Content Structure Details

Deposit Managers can view the content structure details, such as the content structure format, original format, and mapping table.

Deposit Managers cannot update the details while viewing them.

To view the content structure details:

On the List of Content Structures page (see [Accessing the List of Content Structures Page](#)), locate the content structure you want to view and click View. The View Content Structure Details page opens.



Deposits: Content Structure / Details					
Id	5	Creation Date	16/05/2017	Created by	-
Update Date	16/05/2017	Updated by	admin1	Type	CSVCSConverter
Privacy Level	GENERIC				
Content Structure Details					
Name	CSV				
CSV Template	CSV_Loader_Fields				
Generate CSV Option	Complex (one IE per deposit)				
				<input type="button" value="Download CSV Template"/>	<input type="button" value="Cancel"/>

Read-Only View of Content Structure Details

For a description of the information displayed on this page, see the table in [Accessing the List of Content Structures Page](#).

Duplicating a Content Structure

Deposit Managers can duplicate a content structure. This is especially helpful when creating a new content structure. It is often faster to duplicate an existing content structure and then modify it, than to create a new content structure.

To duplicate a content structure:

On the List of Content Structure page (see [Accessing the List of Content Structures Page](#)), locate the content structure you want to duplicate and click Duplicate. The Rosetta system creates a copy of the structure.

An exact copy of the content structure is added to the List of Content Structures page. The Rosetta system automatically labels the new content structure with the name Copy of followed by the name of the original content structure.

Viewing Material Flows Associated with the Content Structure

Deposit Managers can view the material flows that are associated with the content structure.

To view the material flows:

On the List of Content Structures page (see [Accessing the List of Content Structures Page](#)), locate the content structure for which you want to view the material flows and click one of the following:

- The Associated Material Flows link, when multiple material flows are associated with the content structure.
- The name of the material flow, when a single material flow is associated with the content structure.

The List of Material Flows page opens. The page displays columns containing the information described in [Adding a Material Flow](#). You cannot update the material flow details.

To return to the List of Content Structures page, click Save.

Updating a Content Structure

Deposit Managers can update content structure details at any time. For example, a Deposit Manager can specify another content structure or change the mapping table.



To update a content structure:

1. On the List of Content Structures page (see [Accessing the List of Content Structures Page](#)), locate the content structure that you want to update and click Update. The Update Content Structure Details page opens.
2. Modify the fields as needed.
3. To save your changes and return to the List of Content Structure page, click Save. The system updates the content structure details.

Deleting a Content Structure

A Deposit Manager can delete a content structure when it is not being used by any Producers and the Deposit Manager does not want to maintain the content structure.

Deposit Managers cannot delete a content structure when a Producer Agent is using it to deposit content. Deposit Managers can delete the content structure only after the deposit process is complete and no other Producer Agent is using the content structure.

To delete a content structure:

1. On the List of Content Structures page (see [Accessing the List of Content Structures Page](#)), locate the content structure you want to delete and click More. Additional options are displayed.
2. Click Delete. The confirmation page opens.
3. Click OK. The content structure is removed from the list. The content structure is removed from the Rosetta system. Producer Agents can no longer use this content structure when depositing content.



Working with Configuration Files

Working with Configuration Files

Configuration files are text files that enable Deposit Managers to configure advanced settings for Producers such as metadata configuration and e-mail formatting. Configuration files can be stored in various formats, including XML and XSL.

Configuring Copyright Boilerplate Statements

Copyright boilerplate statements contain copyright statements displayed to Producer Agents when they deposit content. Deposit Managers can create multiple boilerplate statements and then use them in different material flows. Deposit Managers work with copyright boilerplate statements using the Boilerplate Statements page (see [Accessing the Copyrights Boilerplate Page](#)). The following activities can be performed using this page:

- [Editing Boilerplate Statements](#)
- [Viewing Boilerplate Statements](#)

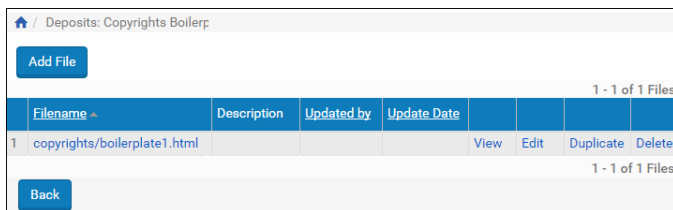
Accessing the Copyrights Boilerplate Page

The Copyrights Boilerplate page enables Deposit Managers to view the list of boilerplate copyright statements stored in the Rosetta system. In addition, Deposit Managers can use this page to edit existing boilerplate statements.

To access the Copyrights Boilerplate page:

From the Rosetta rollover menu, click Deposits > Deposit Arrangements> Copyrights Boilerplate.

The Configuration Files page opens to the boilerplates subgroup.



Filename	Description	Updated by	Update Date				
1 copyrights/boilerplate1.html				View	Edit	Duplicate	Delete

Boilerplate Statements Page

Editing Boilerplate Statements

Deposit Managers can edit an existing boilerplate statement to modify the copyright statement displayed to Producer Agents when they deposit content.

To edit a boilerplate statement:

1. On the Boilerplate Statements page (Deposits > Deposit Arrangements > Copyrights Boilerplate), locate the boilerplate statement you want to modify and click Edit.
The Edit Boilerplate Statement page opens.



- Edit the copyright statement as required and then click Save. The updated boilerplate copyright statement is saved in the Rosetta system.

The updated statement is now displayed to Producer Agents depositing content.

Viewing Boilerplate Statements

Deposit Managers can view copyright boilerplate statements.

Deposit Managers cannot modify the statements while viewing them.

To view a boilerplate statement:

On the Boilerplate Statements page (Deposits > Deposit Arrangements > Copyrights Boilerplate), locate the boilerplate statement you want to modify and click View. The View Boilerplate Statement page opens.

Configuring Producer Agent E-mail

Communication between Staff users who review SIP submissions and the Producer Agents who submit them is automated in the Rosetta system. Some communications (e-mail) are sent by default, others must be configured by a Deposit Manager.

Default E-mail to Producer Agents

When a SIP is rejected, declined, or when a SIP is received successfully by the staging server or accepted for deposit in the permanent repository, Rosetta sends a confirmation e-mail to the Producer Agent. The default fields that appear on these reports include the deposit activity ID, Title, Deposit Date, and Status, as well as the Agent's name and the URL where the Agent can link to view the deposit. Further fields that appear on the e-mails:

- For IEs, the PID.
- For each file:
 - The applicable identifier (such as ISBN, ISSN, or ISMN)
 - The computed checksum(s)
 - The time stamp of the Rosetta activity (that is, the date and time of the SIP status change)

E-mail notifications can make use of digital signatures if configured by a Deposit Manager (see **Digital Signature** in the Configuration Guide).

Customizing Display Fields

E-mails are drawn from an XML file defining many of the fields a user might want to add to the e-mail. All additions and adjustments are made through the email_to_depositor.xsl file.

To access this file and make changes to the e-mail:

- Access the Configuration Files page of the Management module by following the path Deposits > Advanced Tools > Email Configuration

Filename	Description	Updated by	Update Date	View	Edit
./xsl/deposit_activity_status_change/email_to_depositor.xsl	Email sent to the producer agent when a deposit is rejected or declined	admin1	02/02/2017	View	Edit
./xsl/deposit_activity_status_change/email_to_depositor_body	Email sent to the producer agent when a deposit is rejected or declined	admin1	02/02/2017	View	Edit
./xsl/deposit_activity_status_change/email_to_depositor_grow	Email sent to the producer agent when a deposit is rejected or declined	Ex Libris	02/02/2016	View	Edit
./xsl/deposit_activity_status_change/email_to_depositor_sub	Email sent to the producer agent when a deposit is submitted	admin1	02/02/2017	View	Edit
./xsl/emails/EmailProducerReport.xsl	Sends deposit report to the producer	admin1	02/02/2017	View	Edit
./xsl/emails/EmailProducerWithNoContact.xsl	Sends a notification to a Producer that there are no contacts associated with the account	admin1	05/02/2017	View	Edit
./xsl/emails/EmailReport.xsl	Sends scheduled report	admin1	05/02/2017	View	Edit
./xsl/emails/EmailUserPrimaryContact.xsl	Notifies the user that he or she is the primary contact	admin1	05/02/2017	View	Edit
./xsl/emails/EmailUserRegistered.xsl	Confirms a user's registration	admin1	05/02/2017	View	Edit
./xsl/emails/EmailUserAssignedAsPA.xsl	Sent when a user is assigned as a Producer Agent to a Producer	admin1	05/02/2017	View	Edit

Configuration Files for Formatting Deposit-Related E-mail



- In the Filename column, find the email_to_depositor.xml file and click on it or on the corresponding Edit text link. The file opens in an editable window

* Filename: email_to_depositor.xml Last Modified: 03-01-2017
Description: com.exlibris.dps.repository.email.emailToDepositor

```
1 <?xml:stylesheet xmlns:xsl="http://www.w3.org/1999/XSL/Transform"
2 xmlns:xs="http://www.w3.org/2001/XMLSchema"
3 xmlns:java="com.exlibris.dps.deposit.api.DepositEmailXSLUtil"
4 version="2.0"?>
5 <xsl:variable name="language" select="//email-data/General-Info/language" />
6 <xsl:variable name="depositActivityId" select="//email-data/General-Info/depositActivityId" />
7 <xsl:variable name="css" select="//email-data/General-Info/css" />
8 <xsl:variable name="status" select="//email-data/General-Info/status" />
9 <xsl:variable name="addressContact" select="//email-data/General-Info/addressContact" />
10 <xsl:param name="emailToDepositBody" />
11 <xsl:output method="html" omit-xml-declaration="yes" />
12 <xsl:template match="/">
13 <head>
14 <title>User Information</title>
15 <style type="text/css">
16 <xsl:value-of select="java:getCss($css)" />
17 </style>
18 </head>
19 <body>
20 <div id="mailHeader">
21 <div id="logoContainer">
22 
23 <xsl:value-of select="java:getDescription(&apos;UILabels&apos;,$language, &apos;deposit.emai" />
24 </div>
25 </div>
26
27
```

Cancel View Previous Save

Editing a Configuration File

- Add or edit definitions for any available fields. The following information can be transmitted if it is added to the XSL file:
 - For each IE in an approved SIP:
 - IE PID
 - IE title
 - For each file in the IE:
 - the applicable identifier (that is, ISBN, ISSN, ISMN, and so forth)
 - the computed checksum (md5, SHA-256, and CRC32)
 - file name
 - the time stamp of the file status change (that is, the date and time the file status changed to Moved to Permanent)
 - For each rejected or declined IE in the SIP and for each IE containing rejected or declined files:
 - the IE PID
 - the IE title
 - For each file in the IE:
 - the applicable identifier (that is, ISBN, ISSN, ISMN, and so forth)
 - the file status (Approved, Rejected, or Declined)
 - if the file status is Rejected or Declined, the time stamp of the file status change (that is, the date and time the file status changed to Reject or Decline)

Additional E-mail Configuration Files

In addition to the email_to_depositor.xml file and related XSL files, the following XSL files are available for editing:



- deposit_activity_status_change/email_to_depositor.xml: Email sent to the producer agent when a deposit is rejected or declined
- deposit_activity_status_change/email_to_depositor_body.xml: Email sent to the producer agent when a deposit is rejected or declined
- deposit_activity_status_change/email_to_depositor_preview.xml: Email sent to the producer agent when a deposit is rejected or declined
- deposit_activity_status_change/email_to_depositor_submission.xml: Email sent to the producer agent when a deposit is submitted
- EmailToPlanAnalyst.xml: sends preservation plan information to the Preservation Analyst
- EmailAddingRepresentation.xml: sends an e-mail to the user when a representation is added to an IE
- EmailIndividualProducerRegister.xml: confirms the registration of an individual Producer
- EmailProducerReport.xml: sends deposit report to the Producer
- EmailProducerWithNoContact.xml: sends a notification to a Producer that there are no contacts associated with the account
- EmailUserIsPrimaryContact.xml: notifies the user that he or she is the primary contact
- EmailUserNewPasswordIndProd.xml: confirms a new password for an individual Producer
- EmailUserRegister.xml: confirms a user's registration
- EmailUserAssignedAsPA.xml: sent when a user is assigned as a Producer Agent to a Producer
- EmailUserNew.xml: sends an acknowledgment confirming a new user
- EmailUserUpdate.xml: confirms the update of a user's information
- EmailUserDelete.xml: notifies the user that they are being deleted from the system

Most e-mail messages can be previewed by the sender before being sent to the recipient.

Adding an E-mail Confirmation

Rosetta can be configured to send confirmation e-mail to depositors when

- a SIP has been accepted by the staging server and is being processed or
- a SIP has been approved and its contents sent to the permanent repository.

These confirmation emails will be sent if Email Notification is set to true in the SIP processing configuration for this Material Flow. See [SIP Routing Rules](#) for further details.

Configuring Terms of Use

A Terms of Use (TOU) statement appears in the Deposit interface and in the viewers that render objects in the Rosetta interface. Viewers display a TOU statement for the institution that owns a displayed object.

Only one TOU file is allowed for each institution. The file can be edited but not deleted.

To view or edit TOU text for your institution:

1. Open the Configuration Files page from the Rosetta menu (Deposits > Advanced Tools > Terms of Use Configuration Files).
The Configuration Files page opens.



Filename	Description	Updated by	Update Date		
1 copyrights/termsfuse.html	Default Terms of Use	Ex Libris	03/07/2016	View	Edit

1 - 1 of 1 Files

[Back](#)

Configuration Files Page

- To view the text file or edit it, click the relevant link, View or Edit. The View or Edit Configuration File page opens.
- If you selected Edit, you can make edits to the file and click the Save button. (If you selected View, you do not have a Save button on the page. Click Cancel or Back to return to the Configuration Files page.)



Configuring Metadata Profiles

Configuring Metadata Profiles

A metadata profile defines:

- Which metadata elements are mandatory for a given IE
- Which validation routines should apply for each of the IE's metadata elements
- Whether a user can add elements or whether the list of elements that can be associated with the IE is restricted according to a predefined list

This section contains the following topics:

- [Accessing the List of Metadata Profiles Page](#)
- [Creating a New Metadata Profile](#)
- [Editing or Duplicating an Existing Metadata Profile](#)
- [Deleting a Profile](#)

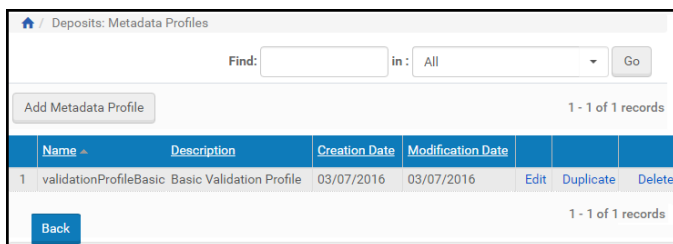
Accessing the List of Metadata Profiles Page

The List of Metadata Profiles page enables Deposit Managers to edit, duplicate, and delete existing Metadata Profiles. Deposit Managers can also use this page to add new metadata profiles.

To access the List of Metadata Profiles page:

From the Rosetta rollover menu, click Deposits > Deposit Arrangements > List of Metadata Profiles.

The List of Metadata Profiles page opens.



Name	Description	Creation Date	Modification Date			
1	validationProfileBasic: Basic Validation Profile	03/07/2016	03/07/2016	Edit	Duplicate	Delete

List of Metadata Profiles Page

You can search specifically for a profile using the Find/in search in the row below the breadcrumb. This searches the existing list for the term you enter.

The table itself displays the profile name and description (as entered by the staff who created the entry) and the creation and modification dates (system-generated).

From this page, you can perform the following actions:



- [Creating a New Metadata Profile](#)
- [Editing or Duplicating an Existing Metadata Profile](#)
- [Deleting a Profile](#)

Creating a New Metadata Profile

To create a new metadata profile:

1. From the List of Metadata Profiles page (Deposits > Deposit Arrangements > List of Metadata Profiles), click the Add Metadata Profile button (above the Name column of the table). The Metadata Profile Editor page opens.

Metadata Profile Editor page

2. Enter a name for the metadata profile and a brief description of it in the fields provided.
3. Add elements to the profile by using the available add buttons and selecting items from the drop-down fields on the Element Editor pages that open.
4. Click Apply to save the profile and remain on the page or Save to save it and return to the List of Metadata Profiles page.
 - Metadata Profiles for depositing structural IEs should not have the access rights configured in the profile in order to facilitate a smooth transfer of the IEs to the permanent storage.
 - If an access right is missing from a content IE in the deposited data, the access rights configured on the relevant Material Flow is added to that content IE.

Editing or Duplicating an Existing Metadata Profile

Staff Managers can make changes to an existing profile by editing it or by duplicating it. Duplicating an existing profile allows users to keep the original profile intact while creating a new profile based on the values entered in the original. To edit or duplicate an existing metadata profile:



1. Access the List of Metadata Profiles page (Deposits > Deposit Arrangements > List of Metadata Profiles) and find the profile you want to edit.
2. In the row of the profile, click the Edit text link if you want to change the profile, click Duplicate if you want to keep a copy of the original profile and use its values as a starting point for a new profile.
3. The Metadata Profile Editor page opens. Values for the profile selected appear on the form.
4. Make changes to any of the editable fields, and add, edit, or delete any of the descriptive metadata or DNX elements.
5. Click Apply to save, Save to save and return to the previous page (the Metadata Profile List page). To cancel changes you made and return to the previous page, click the Back button.

Deleting a Profile

To delete an existing profile

1. To delete a metadata profile, access the List of Metadata Profiles page (Deposits > Deposit Arrangements > Metadata Profiles) and find the profile you want to delete.
2. Click the Delete text link of that row.
A Deletion Confirmation page opens.
3. Confirm the deletion by clicking the Confirm button.
The system deletes the profile and returns you to the List of Metadata Profiles page.



Associating Material Flow Components

Associating Material Flow Components with Material Flows

After metadata forms, submission formats, access rights options, retention policies, and content structure templates are configured, Deposit Managers can associate these components with material flows. Each component can be associated with multiple material flows.

For instructions on associating material flow components with a material flow (or, creating a new material flow), see [Adding a Material Flow](#).



Access Rights

Configuring Access Rights Policies

Access rights policies define who can view which content under what conditions. The policies can be applied to entire IEs or to specific representations and files of IEs (if, for example, you want to provide staff with access to a high-quality Preservation Master and the public with a lower-quality, faster-loading derivative copy).

In order to configure access rights policies, you must be assigned either the Deposit Manager or Data Manager role with the Edit Access Rights Policies role parameter.

How Access Rights Work

Access rights for IEs, representations, and files are processed as follows:

1. A user requests an IE, representation, or file.
2. The system checks the access rights policy for the IE.
3. If the access rights requirements are not met, the system blocks the IE and sends a message to the user.
4. If the access rights requirements for the IE are met, the system grants access to the user seeking the IE.

The system checks the access rights policy for the representation. If the access rights for the representation are not met, the system repeats the access rights check for all additional representations until it runs through every representation in the IE. All the representations that pass the Access Rights are displayed. If all are blocked, the system behaves as if the IE's access rights are not met.

The system checks the access rights policy for every file. The system repeats the access rights check for all files in the representation until it runs through every file in the representation. All the files that pass the access rights are displayed. If all of the files are restricted, the system behaves as if the representation's access rights restrictions are not met (if the Hide Restricted Files checkbox in the Representation Profile is selected).

Adding an Access Rights Policy

Deposit Managers can add a new access rights policy to the Rosetta system. This is done through the copyright statement that displays when a user views content to which this access rights policy applies.

After a policy is added, it can be associated with a material flow.

To add an access rights policy:

1. From the Rosetta drop-down menu, click Data Management > Policies > Access Rights Policies.



ID	Description	Metadata Type	Format	Created by	Creation Date	Edit	Delete
1	AR_S_CONCURRENT_USERS	Limited access according to copyright law	accessrights	policy	SYSTEM	2/27/17	Edit Delete
2	AR_EMBARRASSED_FOR_3_YEARS	Embargoed for 3 Years	accessrights	policy	SYSTEM	2/27/17	Edit Delete
3	AR_EMBARRASSED_UNTIL_2017	Embargoed until 2017	accessrights	policy	SYSTEM	2/27/17	Edit Delete
4	AR_EVERYONE	No restrictions	accessrights	policy	SYSTEM	2/27/17	Edit Delete
5	AR_IP_RANGE	Accessible from institution premises	accessrights	policy	SYSTEM	2/27/17	Edit Delete
6	AR_IP_RANGE_REGISTERED	From within the institution (ip range) and registered users	accessrights	policy	SYSTEM	2/27/17	Edit Delete

Access Rights Policies

1. Click Add Shared Metadata Record. The Details page opens.

Add Access Rights Policy Page

2. In the Copyright Template drop-down list, select the template that must be used to display the copyright statement. (For information on configuring the copyright statements, see [Configuring Delivery Copyrights Statements.](#))
3. Click Add Expression. The Add Expression page opens.

Add Expression Page



4. In the Criteria drop-down list, select the criterion by which the Rosetta system must compare the actual parameters of a user with the parameters you define in the expression. Criteria values are taken from the Access Rights Key Code Table. The table below defines the items you are likely to find in the list.

Expression Criteria

Name Access Is Granted...

User Group	to users who belong to these user groups, as defined in their user group field.
User ID	to the specific user with this user ID (Rosetta user ID).
IP Range	for calls coming from the specified IP range.
Registered User	to users who are registered and authenticated by Rosetta. (Not to users who attempt to access from outside the institution's network)
Everyone	to everyone.
Concurrent Users	to a certain number of users at a time (IE-level policies only).
AR Plug-in	to users of an access rights plug-in that integrates its external interface with that of Rosetta.
LDAP User Group List	to a user who belongs to the listed group defined in the institution's directory and whose credentials are transferred by LDAP (Lightweight Directory Access Protocol).
LDAP User Department	to a user who belongs to the listed department defined in the institution's directory and whose credentials are transferred by LDAP.
LDAP Tuples	if the text string sent through LDAP meets the criterion.
LDAP Course Enrollment	if the text string sent through LDAP meets the criterion.
Moving Wall	based on a specified time before/from the selected date. Select Metadata – File Level or Metadata – IE Level to choose from any metadata-based file or IE-level date field (dc, dcterms, DNX) or select Date to specify a fixed date. Supported time units are years, months, weeks, and days.
Expiration Date	up until the specified date.

Your selection for Criteria may change the labels for the fields just below it. Wait to see if the page refreshes before continuing.

5. In the Operator drop-down list, select an operator (such as equals) to be used to compare the actual parameters of a content consumer with the parameters defined in the Value field. The values for operators are generated by the type of data selected in the Criteria field.



The page reloads when you enter a value that changes the fields below the active field. For example, IP Range as a Criteria will change the Operator field to within or contains; if you select contains, one blank field loads below the operator field; if you select within, two values load. See the figure below.

Deposits ▾ Submissions ▾ Data Management ▾ Preservation ▾

🏠 / Data Management: Access Right Policies / Details

MID	Metadata Type	Description
Created by	Creation Date	
Updated by	Update Date	

New Group

Criteria: IP Range ▾

Operator: within ▾

Value 1:

Value 2:

Cancel Save

Adding an Expression to an Existing Group

6. Finish entering the values. If your policy includes more than one group, make sure you have the correct group specified in the top portion of the form.
7. Click Save. The policy is saved to the group specified. The list of existing access rights policies re-opens.
8. You can add groups and expressions within the groups until you have completed a policy. The following figure shows a policy with two groups and three expressions among them.



Deposits ▾ Submissions ▾ Data Management ▾ Preservation ▾

Home / Data Management: Access Right Policies / Details

Copyright Template: copyrights2.html (INS00)

Description: Accessible for users within the institution

When view is restricted show the following message

Add Expression

Group 1	IP Range contains 178.90.1.0.178.90.1.255	Delete
	User Group equal Registered	Delete
Group 2	User Group equal Staff	Delete

Cancel Save

Access Rights Groups and Expressions

Rosetta reads the groups as if an OR logical operator separated them. Rosetta reads the expressions within the groups as if an AND operator separates them. So, for the figure above, the user gains access if he or she is both in the IP range AND a Registered user, or if he or she is in the user group Staff. Either one of those two groups/conditions will qualify the user for access.

- Click Save. The Metadata Search page opens with your access rights policy included in the list.

The access rights policy now can be associated with a material flow.

Editing an Access Rights Policy

Deposit Managers can edit an existing access rights policy by adding or deleting expressions. To edit an access rights policy:

- On the Access Rights Polices page (see [Adding an Access Rights Policy](#)), locate the access rights policy that you want to edit and click Edit. The Access Rights Editor opens.



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🏠 / Data Management: Access Right Policies / Details

MID	1001	Metadata Type	policy:accessrights	Description	Accessible for users within the institution
Created by	admin1	Creation Date	27/02/2017 16:11:10		
Updated by	admin1	Update Date	27/02/2017 16:11:11		

Copyright Template copyrights2.html (INS00) ▾

* **Description** Accessible for users within the institution

When view is restricted show the following message

Add Expression

Group 1	IP Range contains 178.90.1.0.178.90.1.255	Delete
	User Group equal Registered	Delete
Group 2	User Group equal Staff	Delete

Access Rights Editor

The page contains a list of expressions. Each expression defines criteria (such as an IP address) that a content consumer must meet in order to view the content object.

- Do one of the following:
 - Add an expression, as described in steps 3 through 8 in [Adding an Access Rights Policy](#).
 - Delete an expression, as described in [Deleting an Expression from an Access Rights Policy](#).

When saving changes to a shared metadata record, the following warning message appears:

Changes will affect all institutions – Continue?

Deleting an Expression from an Access Rights Policy

Deposit Managers can delete an expression from an access rights policy when they do not want to use the criteria defined in the expression.

To delete an expression:

- On the Access Rights Editor page (see [Editing an Access Rights Policy](#)), locate the expression that you want to delete and click Delete. The confirmation page opens.
- Click OK. The expression is removed from the list of expressions.

The group of content consumers for which the expression was defined can no longer view the content object.

Displaying a Previous Version of an Access Rights Policy

You can display a previous version of an access rights policy and revert to it.

To display a previous version of an access rights policy and revert to it:



1. Click History for the access rights policy that you want to roll back. A list of versions of the access rights policy appears

Reverting to a Previous Version of an Access Rights Policy

2. Click Revert for the version to which you want to revert.

The details of the access rights policy revert to the version you selected.

Configuring Delivery Copyrights Statements

Delivery copyrights statements are displayed to users viewing an IE that has such a statement associated with its Access Rights policy (see [Adding an Access Rights Policy](#)).

Deposit Managers can add new files or edit existing ones from the Configuration Files page (Deposits > Advanced Tools > Delivery Copyrights Statements).

Delivery Copyright Statements List

Delivery copyright statements can be viewed, edited, copied, created anew, and deleted. All of the options are available from the Configuration Files page for delivery copyright statements. Deposit Managers can view the list of available configuration files as well as open individual files for editing. Copyright files can be added to the list by clicking the Add File button and entering all new information or by clicking the Duplicate text link of an existing statement that resembles one you want to create, then editing it for other purposes.

Assigning an Access Rights Policy

Data Managers can assign an access rights policy to an IE, representation, or file to define who can view the content and when this content can be accessed. Because only one access rights policy can be associated with a representation, if a representation is assigned an access policy, any existing access rights policy assigned to that representation will be overwritten and replaced by the current one.



To assign an access rights policy:

1. Conduct a search for the object whose access you want to restrict. From the Search Results page, click the Editor link that corresponds to your object's row.
The object opens in the Web Editor.
2. In the Actions drop-down menu at the bottom right of the page, click Lock Object and then click the Go button.
The page refreshes with the notice: Locked By: Me.
3. In the tree pane, select the IE, representation, or file to which you want to assign an access rights policy.
4. In the main pane, click the Metadata tab.

Intellectual Entity PID IE1003 Created on 28/02/2017 10:21:45 Created by admin1
Committed on 28/02/2017 16:31:43 Committed by admin1 SIP ID 2
Version 2

Locked By: Me.

IE (IE1003)
Preservation Master Revision 1 (REP1004)
File (FL1005_172Kb)

Object Summary Metadata Services Collections Versions

Add Metadata Assign CMS Assign AR Assign AR Exceptions Assign RP

Name	Type	Mid		
Descriptive	DC	1003	Edit	
Policy	Access Rights	AR_IP_RANGE	View	
DNX	DNX	DNX_IE1003	Edit	

Back Actions: IE Export GO

IE Selected, Metadata Tab Open

5. From the Metadata tab, click the Assign AR Policy button. The Access Rights Policies page opens.

Data Management: Search for Objects
Metadata Type: Access Rights Find: inc: All Go

1 - 9 of 9 Records

	Mid	Description	Metadata Type	Format	Created by	Creation Date		
1	AR_5_CONCURRENT_USERS	Limited access according to copyright law	accessrights	policy	SYSTEM	2/27/17	View	-
2	AR_EMBARGOED_FOR_5_YEARS	Embargoed for 5 Years	accessrights	policy	SYSTEM	2/27/17	View	-
3	AR_EMBARGOED_UNTIL_2017	Embargoed until 2017	accessrights	policy	SYSTEM	2/27/17	View	-
4	AR_EVERYONE	No restrictions	accessrights	policy	SYSTEM	2/27/17	View	-
5	AR_IP_RANGE	Accessible from institution premises	accessrights	policy	SYSTEM	2/27/17	View	-
6	AR_IP_RANGE_REGISTERED	From within the institution (ip range) and registered users	accessrights	policy	SYSTEM	2/27/17	View	-
7	1001	Accessible for users within the institution	accessrights	policy	admin1	2/27/17	View	-
8	1135	Deny All	accessrights	policy	admin1	2/28/17	View	-
9	1218	Plugin AR - For DPS-556	accessrights	policy	admin1	2/28/17	View	-

Add 1 - 9 of 9 Records

Back

Access Rights List

6. Locate the access rights policy you want to assign to the IE or representation and select its button, then click Add.

The access rights rule is assigned to the IE, representation, or file and can be seen on the object's Metadata tab. Users can now view the IE, representation, or file under the new conditions of the access rights policy.

- Because an access rights policy is not required for a representation, the policy can be removed by clicking the Remove action.
- The system generates a provenance event whenever an access rights policy is assigned or removed.



Access Rights Exceptions

Rosetta provides the granting of specific user rights to specific materials through the use of access rights exceptions. These rights add access for certain users that exceed rights already granted to a general user population. Access rights exceptions never restrict users' access further. They are only used to increase the specified user group's access to certain IEs or sets of data where they do not exist in the current active rights. Access rights exceptions are set up in three stages:

- [Setting Up Access Rights Exceptions](#)
- [Displaying a Previous Version of an Access Rights Policy](#)
- [Assigning an Exception to a Set](#)
- [Access Rights Exceptions in the Web Editor](#)

In order to configure access rights exceptions, you must be assigned either the Deposit Manager or Data Manager role with the Edit Access Rights Exceptions role parameter.

Setting Up Access Rights Exceptions

To set up an access rights exception, add an exception from the Access Rights Exceptions List page. To add an access rights exception:

1. From the Rosetta drop-down menu, follow the path: Data Management > Policies > Access Rights Exceptions. The Access Rights Exceptions List page opens. Any existing rights exceptions display in a table with several options for actions that can be performed on them.

Name	Description	Creation Date	Modification Date	Count			
1 1422	Access Rights Exceptions for Preferred Users	28/02/2017	28/02/2017	1	Edit	Duplicate	More Actions
2 1440	test Access Rights Exceptions - J5y	28/02/2017	28/02/2017	0	Edit	Duplicate	Delete More Actions

Access Rights Exceptions List

2. Click the Add Access Rights Exceptions button above the list of exceptions. The Edit Access Rights Exceptions page opens:.



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🏠 / Data Management: Access Rights Exceptions / Details

Copyright Template

* Description

When view is restricted show the following message

Add Expression

Cancel Save

Edit Access Rights Exceptions Page

3. Select a Copyright Template from the existing templates in the drop-down list.
4. Enter a description for the AR in the Description text field. This text identifies the exception on the List of Access Rights Exceptions page.
5. Enter the message you would like users to see when they do not have access to the object based on this particular access rights policy. If you do not enter a custom message, a general default message appears on the user's page.
6. Click the Add Expression button.
The AR Expression page opens. If this is your first expression for this exception, New Group will be selected by default. (On subsequent expressions, To Existing Group will also be available for selection.)

🏠 / Data Management: Access Rights Exceptions / Details

MID	Metadata Type	Description
Created by	Creation Date	
Updated by	Update Date	

New Group

Criteria

Operator

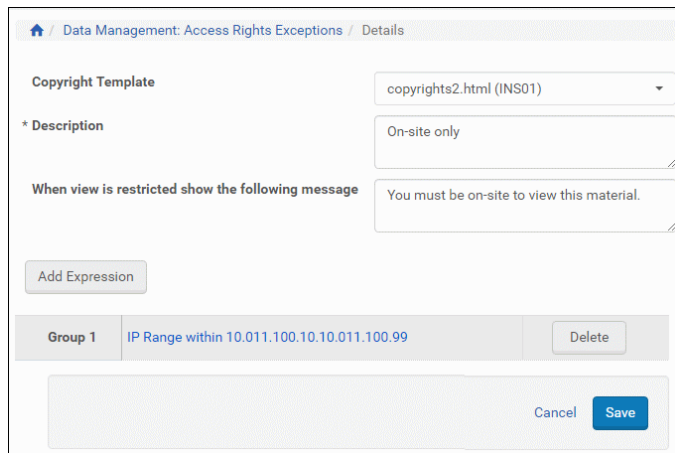
Value 1

Cancel Save



Edit Access Rights Exceptions Page - Add Expression

7. For the Criteria drop-down field, select the item you want to use as a measure for this expression. The fields below may adjust to accommodate the Criteria selection.
8. Select an Operator to compare the Criteria selection with the value(s) you will enter.
9. Enter a value or values in the Value 1 (and Value 2, if applicable) field
10. Click the Save button.
The AR Full View page opens with the expression you just added:



Home / Data Management: Access Rights Exceptions / Details

Copyright Template: copyrights2.html (INS01)

* Description: On-site only

When view is restricted show the following message: You must be on-site to view this material.

Add Expression

Group	Expression	Action
Group 1	IP Range within 10.011.100.10.10.011.100.99	Delete

Cancel Save

Access Rights Exception with One Expression

11. To add another expression, click the Add Expression button and repeat that portion of the procedure. Repeat as needed.
12. Click the Save button.
Your exception is added to the List of Access Rights Exceptions.

Displaying a Previous Version of an Access Rights Exception

You can display a previous version of an access rights exception and revert to it in the same way you do so for an access rights policy. For more information, see [Displaying a Previous Version of an Access Rights Policy](#).

Assigning an Exception to a Set

Once you have created one or more rules for access rights exceptions, you need to assign the exceptions to a set of data. Rosetta uses a wizard to help you do this.

To assign an exception to a set:

1. On the Access Rights Exception List page, find the AR exception you want to assign and click the corresponding Assign to Set text link.
Step 1 of the Assign to Set wizard opens. It displays the name of the process, which is assigned by the system and is read-only.
2. Click the Next button to move to step 2 of the wizard.



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Home / Data Management: Access Rights Exceptions / Details

Filter: Itemized ▾ Find in All ▾ Go

1 - 5 of 58 Records

	Name	Set Type	Object Type	Owner	Creation Date
1	<input checked="" type="radio"/> set for publishing test for spld: 763	Logical	Intellectual Entity	admin1	3/3/17
2	<input type="radio"/> publish URN test	Logical	Intellectual Entity	admin1	3/3/17
3	<input type="radio"/> setForDelete_IE4742	Logical	Intellectual Entity	admin1	3/3/17
4	<input type="radio"/> Itemized with text file2	Itemized	Intellectual Entity	admin1	3/3/17
5	<input type="radio"/> Itemized with text file	Itemized	Intellectual Entity	admin1	3/3/17

1 - 5 of 58 Records

Back Cancel Next

Assign AR Exception to Set

3. Select the set to which you want to apply the AR exception to and click Next.
The third step of the wizard opens, displaying the process name and scheduling information.

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General Information

Process Name (Not Editable) Assign LAR ID 2046 08/03/2017 17:30:13

Scheduling As Soon As Possible

Back Cancel Submit

Assign to Set - Wizard Step 3

4. If the information is correct, click Next. (If it is not, click Back and return to step 2 to correct it, if possible.)
The access rights exception will be applied to the set you identified. The original Access Rights Exceptions List opens to complete the procedure.
You can repeat this procedure to assign more exceptions to more sets (or a single exception to multiple sets).

Access Rights Exceptions in the Web Editor

Access rights exceptions can be applied to IEs from the Web Editor.
To assign an exception to the rights for an IE:

1. Using the Search for Object or Search for Metadata page (Data Management > Search and Manage Queries > Search for Objects), look up the IE to which you want to assign access rights exceptions.
2. Click the Info text link of the row corresponding to the IE you want.
The IE opens in the Web Editor with the Object Summary tab open. If the IE is already locked, an exclamation point with brief text will indicate this above the object hierarchy tree.
3. If the IE is not locked, then, in the Actions drop-down box (lower right of page), select Lock object and click the GO button.
4. Click the Metadata tab in the object information box.
Metadata for the IE displays in the object information box. Above the metadata table, several buttons, including



Add AR Exceptions, are available for this IE.

5. Click the Add AR Exceptions button.
The Local Access Rights Metadata Type page opens. The system displays a list of all access rights exceptions created from the Access Rights Exceptions List page.

	Mid	Description	Metadata Type	Format	Created by	Creation Date	View	History
1	2046	updated desc	accessrights	local	admin1	3/2/17	View	History
2	2067	a desc	accessrights	local	admin1	3/2/17	View	-

Local AR Exceptions

6. Click one radio button beside the exception you want, then click the Add button.
The IE details page opens with the added exception showing under the Metadata tab with options to view or remove the exception.



Retention Policies

About Retention Policies

Retention policies allow libraries to place limits on the length of time particular items will be stored in a repository. Records that are required to be kept for legal or fiscal purposes, for example, may have no value to a library after the required retention time has elapsed. In such cases, Rosetta users can place retention limits on items and have them sent to recycling or purged entirely from the system after a span of time or a particular date.

Retention policies are classified as shared metadata, and, as with access rights in Rosetta, they can be applied to multiple IEs.

Retention policies can be accessed from the following areas on the Staff interface:

- To create and manage retention policies: Deposits > Policies > Retention Policies
- To associate a retention policy with a material flow: Deposits > Deposit Arrangements > Material Flows
- To work on the retention policy of a single IE: Web editor, individual IEs, Metadata tab

Retention policies also appear on deposit forms (in the Deposit module) and on the list of scheduled jobs in the Administration module.

In order to configure retention policies, you must be assigned either the Deposit Manager or Data Manager role with the Edit Retention Policies role parameter.

Creating Retention Policies

To set up retention policies, sign in to the Management module and follow the path Data Management > Policies > Retention Policies.

The Retention Policy page opens:

Mid	Description	Metadata Type	Format	Created by	Creation Date		
1	NO_RETENTION	No Retention Policy	retention	policy	SYSTEM	2/27/17	View

Initial Retention Policy Page

By default, only one policy is preconfigured by the system: a NO_RETENTION policy. This configuration defaults to an indefinite retention of all items in the system that do not have a specified retention policy.

To create a retention policy limit:

1. From the Retention Policy page, click the Add Shared Metadata Record button.
A blank retention policy form opens:



Deposits ▾ Submissions ▾ Data Management ▾ Preservation ▾

🏠 / Data Management: Retention Policies / Details

* Description

Retention Policy

* Date

Permanently Delete

Blank Retention Policy Form

By default, the retention policy uses After particular date and the impact of the purge is not permanent (check box is cleared)—that is, all purged items for this policy are retained in a recycle bin and can be retrieved.

2. **OPTIONAL:** To change the retention policy to a span of time rather than an exact date, use the Retention Policy drop-down menu. Date fields will change according to the type of retention policy you select. The figure below shows one type of policy.

🏠 / Data Management: Retention Policies / Details

* Description

Retention Policy

Reference Date

Retention Unit

* Number of Units

Permanently Delete

Both Types of Retention Policy

3. Enter values in the form's fields. Use the following table for definitions of fields.



Retention Policy Form Fields

Field	Retention Measure (Date or Span)	Description
Description	Both	Describes the policy. Shows in the list of retention policies and helps users identify it.
Retention Policy	Both	Select a specific date in the future or a period of time to lapse from a particular date/event.
Date	Specific date	The exact date on which the items associated with this policy can be deleted from the database. Use DD/MM/YYYY fields or drop-down calendar (as seen in the figure above).
Reference Date	Time elapsed	The date/event on which the period of retention time begins.
Retention Unit	Time elapsed	The unit of time used, as in days or years.
Number of Units	Time elapsed	The number of units to equal the full time elapsed (as in 180 for days).
Permanently Delete	Both	If checked, the items associated with this policy are purged from the system and cannot be retrieved. If left unchecked (the default), items are removed from the standard storage but remain available in a “recycle” storage area.

4. When you have completed the form, click the Save button.
Your new policy is saved to the system, appears in the list of retention policies, and can be assigned to an IE as shared metadata through, for example, the Web Editor, under the Metadata tab, or as part of a material flow.

Working With Retention Policies

The following actions can be undertaken to edit, delete, or assign policies to IEs.

- [Editing a Retention Policy](#)
- [Deleting a Retention Policy](#)
- [Displaying a Previous Version of a Retention Policy](#)
- [Assigning a Retention Policy to an IE](#)

Editing a Retention Policy

You can edit any of the retention policies except for the system-created NO_RETENTION policy.
To edit an existing retention policy:



1. Open the List of Retention Policies page (Deposits > Policies > Retention Policies).
2. Find the policy you want to change in the list.
If there are many policies and you are having trouble finding the one you want, perform a quick search in the upper right corner of the page. You can search by MID if you have the number, or by a case-insensitive search of the Description field.
3. Click the Edit text corresponding to your policy's row.
The policy form opens with its existing entries.
4. Make the changes you want on the form. For information on specific fields, see the table above.

Deleting a Retention Policy

You can delete any staff-created policies unless they are associated with an IE. If you attempt to delete a retention policy that is in use, you will receive a notice telling you the number of IEs to which this policy is attached. To delete an existing retention policy:

1. Open the List of Retention Policies page (Deposits > Policies > Retention Policies).
2. Find the policy you want to delete in the list.
If there are many policies and you are having trouble finding the one you want, perform a quick Find search in the upper right corner of the page. You can search by MID if you have the number, or by a case-insensitive search of the Description field.
3. Click the Delete text corresponding to your policy's row.
A confirmation page opens.
4. Click the Confirm button to continue with the deletion.
The system returns you to the list of retention policies.

Displaying a Previous Version of a Retention Policy

You can display a previous version of a retention policy and revert to it in the same way you do so for an access rights policy. For more information, see [Displaying a Previous Version of an Access Rights Policy](#).

Assigning a Retention Policy to an IE

Data Managers can assign a retention policy to a particular IE. To assign a retention policy to an IE:

1. Open the IE in the Web Editor (see [Accessing the Web Editor](#)).
2. In the IE Tree pane, make sure the IE object (and not the File, for example) is highlighted.
3. In the Actions field at the bottom right of the page, select Lock the IE from the drop-down menu and click the GO button.
The page refreshes. New buttons may appear on the display.
4. Click the Metadata tab.
The page refreshes with several buttons under the Metadata tab:



Data Management: Search for Objects / Details

Intellectual Entity PID IE1003 Created on 28/02/2017 10:21:45 Created by admin1
 Committed on 28/02/2017 16:31:43 Committed by admin1 SIP ID 2
 Version 2

Locked By: Me.

IE (IE1003)
 Preservation Master Revision 1 (REP1004)
 File (FL1005,172Kb)

Object Summary Metadata Services Collections Versions

Add Metadata Assign CMS Assign AR Assign AR Exceptions Assign RP

Name	Type	Mid	
Descriptive	DC	1003	Edit
Policy	Access Rights	AR_IP_RANGE	View
DNX	DNX	DNX_IE1003	Edit

Back Actions: IE Export GO

Assigning a Retention Policy to an IE

- Click the Assign RP button.
The Retention Policies list opens. Beside each option is a radio button.
- Select the policy you want to add, then click the Add button.
The IE reopens in the Web editor with the retention policy appearing in the list under the Metadata tab. The IE now adheres to this retention policy.

To unassign a retention policy of an IE:

- Search for the IE whose retention policy you want to remove.
- View the metadata list for the IE and click Remove for the retention policy.

The retention policy is removed.



Managing Generic Material Flows

About Generic Material Flows

Deposit Managers can manage generic material flows that exist in the Rosetta system as a single unit. For example, a Deposit Manager can activate, or change the name of, a generic material flow. (For general information on material flows, see [Managing Generic Material Flows](#) in the Rosetta Overview Guide.)
Deposit Managers work with generic material flows using the List of Material Flows page.

Accessing the List of Material Flows Page

The List of Material Flows page enables Deposit Managers to view the existing generic material flows and create new material flows.
To access the List of Material Flows page, click the following links from the Rosetta rollover menu: Deposits > Deposit Arrangements > Material Flows.

ID	Active	Name	Producer Profile	Template	Created On	Updated On	View	Update	Duplicate	Delete
45239	Active	Bagit FTP	View List	Automated	17/05/2017 14:24:18	17/05/2017 14:24:18	View	Update	Duplicate	Delete
45241	Active	Test FTP Limited Mets	View List	Automated	17/05/2017 14:24:18	17/05/2017 14:24:18	View	Update	Duplicate	Delete
45244	Active	Auto Generate CSV MF RJJ	No Associated Producer Profiles	Manual	17/05/2017 14:24:18	17/05/2017 14:24:18	View	Update	Duplicate	Delete
45246	Active	New Material Flow-QD	View List	Manual	17/05/2017 14:24:18	17/05/2017 14:24:18	View	Update	Duplicate	Delete
45247	Active	New Material Flow-9D	View List	Manual	17/05/2017 14:24:18	17/05/2017 14:24:18	View	Update	Duplicate	Delete
45248	Active	New Material Flow-1Q	View List	Manual	17/05/2017 14:24:18	17/05/2017 14:24:18	View	Update	Duplicate	Delete
45249	Active	New Material Flow-LJ	View List	Manual	17/05/2017 14:24:18	17/05/2017 14:24:18	View	Update	Duplicate	Delete
45228	Active	Keren Aurigma 1	View List	Manual	17/05/2017 14:24:18	17/05/2017 14:24:18	View	Update	Duplicate	Delete
45229	Active	Yael Bagit NFS	View List	Automated	17/05/2017 14:24:18	17/05/2017 14:24:18	View	Update	Duplicate	Delete
45230	Active	CSV Manual	View List	Manual	17/05/2017 14:24:18	17/05/2017 14:24:18	View	Update	Duplicate	Delete

List of Material Flows Page

The list contains the following information for each material flow:

List of Material Flows Page Columns

Column	Description
	Indicates the material flow status:
Active	<ul style="list-style-type: none"> Yellow - The material flow is active. Grey - The material flow is inactive.
Name	Displays the name of the material flow.



Column	Description
Producer Profile	<p>Displays:</p> <ul style="list-style-type: none"> The name of the Producer profile when the material flow is associated with only one Producer profile The Associated Producer Profiles link when the material flow is associated with multiple Producer profiles
Template	<p>Displays the type of template on which the material flow is based:</p> <ul style="list-style-type: none"> Manual - Producer Agents can use the material flow to deposit content manually. Automated - Content is automatically deposited to the Rosetta system from a remote server or local computer.
Created On	Displays the date on which the material flow status was created.
Updated On	Displays the last date on which the material flow was updated.

Adding a Material Flow

Deposit Managers can add a new generic material flow to define how Producer Agents can deposit content. To add a material flow, the metadata forms, submission formats, access rights options, retention policy, and content structure must already be configured. For more information, see About **Configuring Material Flow Infrastructure**. To add a material flow:

1. On the List of Material Flows page, above the material flows list, click Add Material Flow. The Material Flow Definition page opens

Material Flow Definition Page

2. Complete the fields as follows:
 - In the Name field, enter a name for the material flow.
 - In the Material Flow Template drop-down list, select one of the following options:
 - Automated, when you want to enable Producer Agents to deposit content automatically from a specified location on a server or local computer
 - Manual, when you want to enable Producer Agents to upload content or specify its location manually



For more information on automated and manual deposit, see Managing Generic Material Flows in the Rosetta Overview Guide.

3. Click Next. The Material Flow Details page opens.

Material Flow Details Page

4. Complete the fields as described in the following table:
Add Material Flow: Step 2 Page Fields

Field	Description
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Material Flow Definition pane:

Name	The name of the material flow.
------	--------------------------------

Description/Instructions	The description of the material flow.
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Status	The material flow's status: <ul style="list-style-type: none"> Active - The material flow is available to associated Producer Agents.
--------	--




Field	Description
	<ul style="list-style-type: none"> Inactive - The material flow is not available to associated Producer Agents.
Sampling Rate	<p>The percentage of Producer Agent content that needs to be reviewed by staff users:</p> <ul style="list-style-type: none"> 100% - All deposited content needs to be reviewed by Assessors and Arrangers. Less than 100% - The specified percentage of content needs to be reviewed by an Approver.
Internal	<ul style="list-style-type: none"> No – available to all users Yes – available to staff users only
Assertion of Copyrights	The copyright boilerplate that must be displayed to Producer Agents.
Status Date	Displays the last date on which the material flow was updated.
Material Flow Type	<p>The types of content that Producer Agents can deposit. This drop-down list contains the material types that were configured in advance by a Deposit Manager or a Rosetta Administrator. You can configure the options available here by clicking the pencil icon</p>  <p>. For more information, see the Rosetta Configuration Guide.</p>
Technical Definitions pane:	
Select Content Structure	<p>The content structure that is available to associated Producer Agents when they deposit content automatically.</p> <p>This drop-down list contains the content structure templates that were configured in advance by a Deposit Manager or Back Office Administrator. You can configure the options available here by clicking the pencil icon</p>  <p>. For more information, see Configuring Content Structures.</p>
Select Submission Format	<p>The submission format that Producer Agents can use when they upload files.</p> <p>This drop-down list contains the submission formats that were configured in advance by a Deposit Manager or Back Office Administrator. You can configure the options available here by clicking the pencil icon</p>  <p>. For more information, see Configuring Submission Formats.</p>
Automatically extract compressed files	<p>If this check box is selected, the system automatically extracts submitted compressed files, in accordance with the automatic decomposition rules (see Configuring Automatic Decomposition Rules in the Rosetta Configuration Guide).</p> <p>For automated material flows, submission format validation (file max/min number, size, extension.) will be ignored for compressed files.</p>




Field	Description
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Descriptive Definitions pane:


Select Metadata Form	<p>The metadata form that Producer Agents must complete when they deposit content. This drop-down list contains the metadata forms that were configured in advance by a Deposit Manager or Back Office Administrator. You can configure the options available here by clicking the pencil icon</p> <p> . For more information, see About Configuring Metadata Forms.</p>
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Upload Source Metadata files	<p>Select this option to allow a Producer Agent to upload source metadata files when depositing IEs in metadata structures other than Dublin Core. This allows your institution to store complete information for IEs conforming to complex and custom metadata schemes and to view this data in the Web editor.</p>
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Access Rights Form pane:

Access Rights list	<p>Select the options that must be available to Producer Agents when they deposit content. Selections are made by double-clicking a list item or clicking the plus (+) sign beside an item. To remove an item, double-click it from the selected box or click the minus sign (-) beside it. The Access Rights list box contains the options that were configured by a Data Manager. You can configure the options available here by clicking the pencil icon</p> <p> . For more information, see Configuring Access Rights Policies.</p>
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Retention Policy Form pane:

Retention Policy list	<p>Select a retention policy from the list of available policies. If you want the material to be saved indefinitely, select the No Retention Policy option. Selections are made by double-clicking a list item or clicking the plus (+) sign beside an item. To remove an item, double-click it from the selected box or click the minus sign (-) beside it. The Retention Policy list contains the options that were configured by a Data Manager. You can configure the options available here by clicking the pencil icon</p> <p> . For more information, see Creating Retention Policies.</p>
-----------------------	--

5. Click Save.

The List of Material Flows page opens. The list contains the newly added material flow. The material flow is added to the Rosetta system.

Activating and Deactivating Material Flows

Deposit Managers can deactivate a material flow when they need to finish configuring the material flow settings, or if they want to temporarily disable the material flow without deleting it. Deposit Managers can activate an inactive material flow at any time.

Deposit Managers cannot deactivate a material flow when a Producer Agent is using it to deposit content. Deposit Managers can deactivate the material flow only after the deposit process has been completed and no other Producer



Agent is using the material flow.

On the List of Material Flows page, the material flow's status is indicated by the check mark in the Active column:

- Yellow - The material flow is active.
- Grey - The material flow is inactive.

To activate or deactivate a material flow:

1. On the List of Material Flows page (see [Accessing the List of Material Flows Page](#)), locate the material flow 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 material flow status is changed from active to inactive, or from inactive to active.

Duplicating a Material Flow

Deposit Managers can duplicate material flows. This is especially useful when creating a new material flow. It is often faster to duplicate an existing material flow and modify it, than to create a new material flow.

To duplicate a material flow:

On the List of Material Flows page (see [Accessing the List of Material Flows Page](#)), locate the material flow you want to duplicate and click Duplicate. The Rosetta system creates a copy of the material flow.

An exact copy of the material flow is added to the List of Material Flows page. The Rosetta system automatically labels the new material flow with the name Copy of followed by the name of the original material flow.

Updating a Material Flow

Deposit Managers can modify material flow details at any time. For example, a Deposit Manager can add more submission formats or metadata forms.

To update a material flow:

1. On the List of Material Flows page (see [Accessing the List of Material Flows Page](#)), locate the material flow you want to update and click Update. The Update Material Flow Details page opens.
2. Modify the fields as required.
3. To save your changes and return to the List of Material Flows page, click Save. The List of Material Flows page opens.

The material flow details are updated.

Deleting a Material Flow

A Deposit Manager can delete a material flow when it is not used by any Producers and the Deposit Manager does not want to maintain the material flow.

Deposit Managers cannot delete a material flow while a Producer Agent is using it to deposit content. Deposit Managers can delete the material flow only after the deposit process has been completed and no other Deposit Manager is using the material flow.

To delete a material flow:

1. On the List of Material Flows page (see [Accessing the List of Material Flows Page](#)), locate the material flow you want to delete and click More. Additional options are displayed.



2. Click Delete. The confirmation page opens.
3. Click OK. The material flow is removed from the list.
The material flow is removed from the Rosetta system. Producer Agents can no longer use it when they deposit content.



Managing Generic Producer Profiles

About Managing Producer Profiles

Deposit Managers can manage Producer profiles as a single unit. For example, a Deposit Manager can activate a Producer profile or add a new profile. (For general information on Producer profiles, see Understanding Rosetta Users in the Rosetta Overview Guide.)

Deposit Managers work with Producer profiles using the List of Producer Profiles page (see [Accessing the List of Producer Profiles Page](#)).

Accessing the List of Producer Profiles Page

The List of Producer Profiles page enables Deposit Managers to work with Producer profiles and perform activities, such as adding new Producer profiles, updating Producer profile details, and activating Producer profiles.

To access the Producer Profile List page, from the Rosetta rollover menu, follow the path Deposits > Producers and Agents > Producer Profiles. The Producer Profile List page opens:

Active	Name	Type	Update Date				
1	<input checked="" type="checkbox"/> selenium enrichment producer profile	Generic	17/05/2017 14:24:18	View	Update	Duplicate	Delete
2	<input checked="" type="checkbox"/> Default	Generic	17/05/2017 14:24:18	View	Update	Duplicate	Delete
3	<input checked="" type="checkbox"/> Demo Internal Producer - Default	Personalized	17/05/2017 14:24:18	View	Update	Duplicate	Delete
4	<input checked="" type="checkbox"/> Test Create Producer Profile - G9a	Generic	17/05/2017 14:24:18	View	Update	Duplicate	Delete
5	<input checked="" type="checkbox"/> Human Stage PF selenium	Generic	17/05/2017 14:24:18	View	Update	Duplicate	Delete
6	<input checked="" type="checkbox"/> seleniumTestProfile	Generic	17/05/2017 14:24:18	View	Update	Duplicate	Delete
7	<input checked="" type="checkbox"/> Demo Internal Producer - Default	Personalized	17/05/2017 14:24:18	View	Update	Duplicate	Delete
8	<input checked="" type="checkbox"/> Demo Internal Producer - Default	Personalized	17/05/2017 14:24:18	View	Update	Duplicate	Delete
9	<input checked="" type="checkbox"/> Demo Internal Producer - Default	Personalized	17/05/2017 14:24:18	View	Update	Duplicate	Delete
10	<input checked="" type="checkbox"/> aaa - Default	Personalized	17/05/2017 14:24:18	View	Update	Duplicate	Delete

Producer Profile List Page

This page displays columns containing the following information:

Producer Profile List Columns

Column	Description
Active	Indicates the Producer profile status:



Column	Description
	<ul style="list-style-type: none"> • Yellow - The Producer profile is active. • Grey - The Producer profile is inactive.
Name	Displays the name of the Producer profile.
	Displays the type of the Producer profile:
Type	<ul style="list-style-type: none"> • Generic - The Rosetta system automatically assigns the generic settings that are defined by a Deposit Manager. • Personalized - A Negotiator defines and assigns personalized settings.
Update Date	Displays the last date on which the Producer profile was updated.

Adding a Producer Profile

Deposit Managers can add a generic Producer profile to define how the associated Producer Agents deposit content. When adding a profile, Deposit Managers configure settings on the following pages:

- On the Producer Profile page, deposit control settings are defined.
- On the Material Flows page, material flows that are associated with the Producer profile are defined.

To add a generic Producer profile:

1. On the Producer Profile List page (Deposits > Producers and Agents > Producer Profiles), above the Producer profiles list, click the Add Producer Profile button. The Producer Profile page opens.

The screenshot shows the 'Producer Profile Details' page. At the top, there is a breadcrumb trail: 'Deposits: Producer Profiles / Details'. Below this, there is a summary section with the following information:

- Profile ID: -
- Created by: admin1
- Created on: 21/05/2017
- Profile name: -
- Updated by: admin1
- Updated on: 21/05/2017
- Profile Type: Generic

Below the summary, there are two tabs: 'Producer Profile' (selected) and 'Material Flow List'. The main form area contains the following fields:

- * Name: [Text input field]
- Status: [Dropdown menu showing 'Active']
- Status Date: 21/05/2017
- * Active Deposits Quota (GB): [Text input field]
- * Default Sampling rate (%): [Text input field]
- Fast Track Enabled: false

At the bottom of the form, there are two buttons: 'Back' and 'Save'.

Producer Profile Page, Producer Profile Tab



2. Define the deposit control settings, as described in [Configuring Deposit Control Settings](#).
3. Click Save.
The deposit control settings are saved in the Rosetta system.
4. Click the Material Flows tab.
The Material Flow List page opens

Name	Template	Content Structure	Acquire Method	Status Date
1 selenium enrichment materialflow	Manual	SoFComplex	Http Load	01/01/1970 02:00:00
1 <input checked="" type="checkbox"/> AR RP CSV MF selenium	Manual	CSV selenium	HDpSubmissionFormatDetailedCSV	01/01/1970 02:00:00
2 <input type="checkbox"/> AR RP METS MF selenium	Automated	METS	NFS	01/01/1970 02:00:00
3 <input type="checkbox"/> Auto Generate CSV MF r0J	Manual	Auto Generate CSV CS r0J	HDpSubmissionFormatDetailedCSV	01/01/1970 02:00:00
4 <input type="checkbox"/> Bagit FTP	Automated	Keren Bagit	NFS	01/01/1970 02:00:00
5 <input type="checkbox"/> Bagit NFS	Automated	Keren Bagit	NFS	01/01/1970 02:00:00
6 <input type="checkbox"/> Bagit SFTP	Automated	Keren Bagit	HDpSubmissionFormatDpsSFTP	01/01/1970 02:00:00
7 <input type="checkbox"/> CSV Manual	Manual	CSV	HDpSubmissionFormatDetailedCSV	01/01/1970 02:00:00
8 <input type="checkbox"/> Demo Bagit	Automated	Demo Bagit	NFS	01/01/1970 02:00:00
9 <input type="checkbox"/> Email CSV MF selenium	Manual	CSV selenium	HDpSubmissionFormatDetailedCSV	01/01/1970 02:00:00
10 <input type="checkbox"/> Email METS MF selenium	Automated	METS	NFS	01/01/1970 02:00:00

Material Flow List Page

5. Associate material flows with the Producer profile, as described in [Associating Material Flows with a Generic Producer Profile](#). The selected material flows are displayed in the Material Flow Selected pane.
6. Click Save.
The Producer profile is added to the Rosetta system.

Activating and Deactivating Producer Profiles

Deposit Managers can deactivate a Producer profile when they need to finish configuring the profile settings, or if they want to temporarily disable the profile without deleting it. Deposit Managers can activate an inactive profile at any time. Deposit Managers cannot deactivate a profile if it is associated with one or more Producers.

On the Material Flows List page, the status of the material flow is indicated by the check mark in the Active column:

- Yellow - The material flow is active.
- Grey - The material flow is inactive.

To activate or deactivate a Producer profile:

1. On the List of Producer Profiles page (Deposits > Producers and Agents > Producer Profiles), locate the Producer profile 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 Producer profile status is changed from active to inactive, or from inactive to active.



Updating a Producer Profile

Deposit Managers can update an existing Producer profile when they need to change the profile settings. When updating a Producer profile, Deposit Managers can change:

- the way in which the deposit control settings are defined
- the material flows that are associated with the Producer profile

To update a Producer profile:

1. On the List of Producer Profiles page (Deposits > Producers and Agents > Producer Profiles), locate the Producer profile that you want to update and click Update. The Update Producer Profile page opens.
2. Modify the Producer profile details on the following tabs:
 - Producer Profile, when you want to modify the deposit quotas and the default sampling rate. (For more information, see [Configuring Deposit Control Settings](#).)
 - Material Flows, when you want to associate more material flows with the profile, delete material flows, or activate and deactivate material flows. (For more information, see [Configuring Material Flow Infrastructure](#).)
3. To save the Producer profile and return to the List of Producer Profiles page, click Save. The Producer profile is updated in the Rosetta system.

Duplicating a Producer Profile

Deposit Managers can duplicate Producer profiles. This is especially helpful when creating a new Producer profile. It is often faster to duplicate an existing profile and modify it, than to create a new profile.

To duplicate a Producer profile:

On the List of Producer Profiles page (Deposits > Producers and Agents > Producer Profiles), locate the Producer profile you want to duplicate and click Duplicate. The Rosetta system creates a copy of the profile.

An exact copy of the Producer profile is added to the List of Producer Profiles page. The Rosetta system automatically labels the new Producer profile with the name Copy of followed by the name of the original Producer profile.

Deleting a Producer Profile

A Deposit Manager can delete a Producer profile only when it is not associated with any Producers and the Deposit Manager does not want to maintain the Producer profile.

To delete a Producer profile:

1. On the List of Producer Profiles page (Deposits > Producers and Agents > Producer Profiles), locate the Producer profile that you want to delete.
2. Click More. Additional options are displayed.
3. Click Delete. The confirmation page opens.
4. Click OK. The profile is removed from the list of the Producer profiles.

The Producer profile is deleted from the Rosetta system.



Managing Material Flows

About Managing Material Flows

Deposit Managers manage material flows that are assigned to a generic Producer profile to define how associated Producer Agents deposit content. For example, a Deposit Manager can activate a material flow for, or remove a material flow from, a Producer profile. (For general information on material flows, see Material Flows in the Rosetta Overview Guide.)

Deposit Managers work with material flows associated with a Producer profile using the Material Flows List page.

Accessing the Material Flows List Page

The Material Flows List page enables Deposit Managers to control the material flows that are associated with a generic Producer profile.

To access the Material Flows List page:

1. From the Rosetta rollover menu, click Deposits > Producers and Agents > Producer Profiles. The Producer Profile List opens.
2. Locate the Producer profile with which you want to work and click its name. The View Producer Profile page opens.
3. Click the Material Flows tab. The Manage Materials Flows (Generic Producer Profile) page opens

Name	Template	Content Structure	Acquire Method	Status Date
1 selenium enrichment materialflow	Manual	SoF.Complex	Http Load	01/01/1970 02:00:00 Remove
Material Flow pool				
Name	Template	Content Structure	Acquire Method	Status Date
1 <input type="checkbox"/> AR RP CSV MF selenium	Manual	CSV selenium	HDpSubmissionFormatDetailedCSV	01/01/1970 02:00:00
2 <input type="checkbox"/> AR RP METS MF selenium	Automated	METS	NFS	01/01/1970 02:00:00
3 <input type="checkbox"/> Auto Generate CSV MF f0J	Manual	Auto Generate CSV CS f0J	HDpSubmissionFormatDetailedCSV	01/01/1970 02:00:00
4 <input type="checkbox"/> Bagit FTP	Automated	Keren Bagit	NFS	01/01/1970 02:00:00
5 <input type="checkbox"/> Bagit NFS	Automated	Keren Bagit	NFS	01/01/1970 02:00:00
6 <input type="checkbox"/> Bagit SFTP	Automated	Keren Bagit	HDpSubmissionFormatDpsSFTP	01/01/1970 02:00:00
7 <input type="checkbox"/> CSV Manual	Manual	CSV	HDpSubmissionFormatDetailedCSV	01/01/1970 02:00:00
8 <input type="checkbox"/> Demo Bagit	Automated	Demo Bagit	NFS	01/01/1970 02:00:00
9 <input type="checkbox"/> Email CSV MF selenium	Manual	CSV selenium	HDpSubmissionFormatDetailedCSV	01/01/1970 02:00:00
10 <input type="checkbox"/> Email METS MF selenium	Automated	METS	NFS	01/01/1970 02:00:00

Material Flows List Page

The Material Flows List page consists of two panes:



- The Material Flow Selected pane lists the material flows that are associated with the Producer profile. This pane displays columns containing the following information:

Material Flow Selected Pane Columns

Column	Description
	Indicates the material flow's status:
Active	<ul style="list-style-type: none"> Yellow - The material flow is active. Grey - The material flow is inactive.
Name	Displays the name of the material flow.
	Displays the type of template on which the material flow is based:
Template	<ul style="list-style-type: none"> Manual - Producer Agents can use the material flow to deposit content manually. Automatic - Content is automatically deposited to the Rosetta system from a remote server or local computer.
Content Structure	Displays the material flow content structure.
	Indicates how Producer Agents can deposit content:
Acquire Method	<ul style="list-style-type: none"> HTTP - Producer Agents deposit content manually FTP or NFS - Content is automatically deposited to the Rosetta system from a remote server (through FTP) or local computer (through NFS)
Status Date	Displays the last date on which the material flow status was changed.

- The Material Flow Pool pane lists all available material flows that you can associate with the Producer profile. This pane displays the same columns as the Material Flow Selected pane (see above table).

Associating Material Flows with a Generic Producer Profile

You can associate material flows with generic Producer profiles to define how Producer Agents can deposit content. To associate material flows with a generic Producer profile:

- On the Material Flows List page (see [Accessing the Material Flows List Page](#)), in the Material Flow Pool pane, select the material flows you want to associate with the profile by selecting the appropriate check boxes.
- Click Add Selected. The selected material flows are displayed in the Material Flow Selected pane.

The Producer Agents associated with the Producer can now deposit content using the material flows you selected.

Activating and Deactivating Material Flows

Deposit Managers can deactivate a material flow if they need to finish configuring the material flow settings, or if they want to temporarily disable the material flow without deleting it. Deposit Managers can activate the inactive material flow



at any time.

Deposit Managers cannot deactivate a material flow when a Producer Agent is using it to deposit content. Deposit Managers can deactivate the material flow only after the deposit process is complete and no other Producer Agent is using the material flow.

On the Material Flows List page, the status of the material flow is indicated by the check mark in the Active column:

- Yellow - The material flow is active.
- Grey - The material flow is inactive.

To activate or deactivate a material flow:

1. On the Material Flows List page (see [Accessing the Material Flows List Page](#)), in the Material Flow Selected pane, locate the material flow 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 material flow status is changed from active to inactive, or from inactive to active.

Removing Material Flows from a Producer Profile

Deposit Managers can remove a material flow from a generic Producer profile when they do not want any Producer Agents to use it for depositing content.

Deposit Managers cannot remove a material flow when a Producer Agent is using it to deposit content.

To remove a material flow from a Producer profile:

1. On the Material Flows List page (see [Accessing the Material Flows List Page](#)), in the Material Flow Selected pane, locate the material flow you want to remove and click Remove.
2. Click Save. The material flow is removed from the list of material flows associated with the Producer profile.

Producer Agents associated with the Producer cannot use the material flow to deposit content.



SIP Processing, Configuration, and Routing Rules

Understanding SIP Processing

SIP processing settings define how a submission information package (SIP) is moved between processing stages on the Staging Server, and how this SIP is processed at each stage.

The SIP processing workflow begins when a SIP is moved from the Deposit Server to the Staging Server, and ends when a SIP is moved from the Staging Server to the Permanent Repository. At each stage, the Rosetta system performs a series of tasks, as described in the table below.

SIP Processing Stages

Stage	Description
Pre-Approval	After files are uploaded to the Staging Server, the Rosetta system runs a series of tasks, known as a validation stack, to identify technical problems, such as viruses or corrupted files, and extract technical metadata. For more information, see Pre-Approval Stage .
Approval	The SIP is reviewed by Assessors, Arrangers, and Approvers. These staff users decide whether the SIP should be approved, returned to the Producer Agent, or declined. For more information, see Approval Stage . For general information on the review of SIPs by staff users, see Assessors, Arrangers, and Approvers in the Rosetta Staff Users'™s Guide.
Enrichment	The Rosetta system prepares the SIP for storage in the Permanent Repository. For more information, see Enrichment Stage .
Move to Permanent	The Rosetta system moves the SIP to the Permanent Repository. For more information, see Move to Permanent Stage .

A Deposit Manager defines the following settings to configure SIP processing:

- SIP processing configuration, which specifies how the SIP is processed at each stage. A Deposit Manager can select a task chain for each stage from the predefined list.
A Deposit Manager can create multiple SIP processing configurations for different SIPs.
For more information about SIP processing configuration, see [Defining SIP Processing Configuration](#).
- SIP routing rules, which specify criteria for choosing the SIP processing configuration that must be applied to the specific SIP.
When creating SIP routing rules, a Deposit Manager defines input parameters (such as material type and Producer) and corresponding output parameters (such as SIP processing configuration that must be applied to the SIP and approval group that reviews the SIP).
For more information about SIP routing rule configuration, see [Configuring SIP Routing Rules](#).



Pre-Approval Stage

At the pre-approval stage, the Rosetta system performs a task chain known as a validation stack. The validation stack tasks verify that the files uploaded to the Staging Server do not have any technical problems such as viruses or corruption.

The validation stack task chain can contain the following tasks:

- [Fixity Check](#)
- [Virus Check](#)
- [Format Check](#)
- [Technical Metadata Extraction](#)
- [Risk Extraction](#)

A Deposit Manager can configure multiple validation stack task chains for different SIP configurations. For example, one SIP configuration can use a validation stack that performs all the tasks, while another SIP configuration can use a validation stack that does not perform a virus check.

The Rosetta system moves only those files that successfully pass the validation stack checks to the next processing stage.

Otherwise, the Rosetta system marks the failed files as problematic and forwards them to a Technical Analyst. (For more information on Technical Analysts, see Technical Analysts in the Staff User's Guide.)

Fixity Check

The fixity check task verifies that the files uploaded to the Staging Server are not corrupted. This task generates a checksum, which is stored in the file metadata. When the file is moved to the Staging Server, the Rosetta system compares the actual checksum with the original checksum using hash algorithms, such as CRC32 or MD5.

A fixity check can be run without providing an algorithm as a parameter. In this case Rosetta simply verifies the file with the expected name exists in storage without accessing the file to determine its integrity.

Checksums may be provided in the deposited METS, csv, and Bagit. In such cases, Rosetta validates the checksum values. If the checksum is the same type that Rosetta runs and the value is found to be valid, Rosetta overwrites the dnx section with information from the internal outcome. If validation fails, the SIP is routed to the TA work area with an appropriate error message.

An example of such a checksum value in the deposited METS is as follows:

```
<mets:techMD ID="fid1-1-amd-tech">

  <mets:mdWrap MDTYPE="OTHER" OTHERMDTYPE="dnx">

    <mets:xmlData>

      <dnx xmlns="http://www.exlibrisgroup.com/dps/dnx" xmlns:out="http://www.loc.gov/METS/"
xmlns:dc="http://purl.org/dc/elements/1.1/" xmlns:xlink="http://www.w3.org/1999/xlink" xmlns:xlin="http://www.w3.org/
1999/xlink">

        <section id="fileFixity">

          <record>

            <key id="agent">REG_SA_JAVA5_FIXITY</key>
```



```
<key id="fixityType">MD5</key>

<key id="fixityValue">4179a95cc8635d84690a87e782c3ace4</key>

</record>

</section>

</dnx>

</mets:xmlData>

</mets:mdWrap>

</mets:techMD>
```

You can configure custom fixity checks. First install the plugin for the fixity. Then add the plugin to the Fixity Type code table (see Appendix A Code Tables in the Rosetta Configuration Guide.) The custom fixity is then available when adding parameters to a task and is indexed and searchable.

Virus Check

The virus check task verifies that the submitted files do not contain any viruses. This task can run any deployed virus check plugin. For more information, see the Virus Check section of the Rosetta Configuration Guide.

Format Check

The format check task automatically identifies the format of the file by analyzing its content. If the extension of the file does not correspond to the format that the task identified, the Rosetta system generates an error.

To perform the format check, the task uses the format identification task. Multiple format identification tools can run in this stage; however, only the first PRONOM-based tool has operational impact on the system. Output from any additional tool is only saved and indexed for searching.

Technical Metadata Extraction

The technical metadata generation task produces technical metadata about a file (such as file size and creation date). The Rosetta system generates this metadata based on the metadata embedded into the file, as well as on the information that the system identifies automatically.

To generate technical metadata, the task uses a utility such as JHOVE or the NLNZ MD Extractor. Each of these utilities generates technical metadata for different formats. Deposit Managers associate the metadata generation utilities with formats using the Format to MD Extraction mapping table.

Risk Extraction

As part of the validation stack phase in SIP processing, Rosetta determines whether the extracted technical metadata has a risk associated with its format. If it does, the system runs the risk extractor tool and saves the output in the HDeStreamRef table. The extracted technical metadata is stored in a way that allows the risk analysis job to gather the information and summarize it in risk reports.

After a validation stack is performed, the system modifies information about the SIP in the DNX section of the METS file.



Approval Stage

After a SIP successfully passed the validation stack checks (see [Pre-Approval Stage](#)), the Rosetta system forwards this SIP to one of the following routes:

- An Assessor and Arranger
- An Approver. The amount of content to be reviewed by an Approver is determined by the sampling rate parameter, which is defined at the material flow level. Staff users can mandate one of the following:
 - 100% - All content must be reviewed by an Approver
 - Less than 100% - The specified amount of content must be reviewed by an Approver. The rest of the content is moved to the next processing stage without an Approver's review.

Enrichment Stage

At the post-approval stage, the Rosetta system prepares the SIPs for storage in the Permanent Repository. For example, the Rosetta system can generate derivative copies and thumbnails for intellectual entities (IEs), as well as synchronize metadata stored in a collection management system with the IE metadata.

If a SIP fails to pass the post-approval stage, the Rosetta system forwards this SIP to a Technical Analyst. (For more information on Technical Analysts, see [Technical Analysts in the Rosetta Staff User's Guide](#).)

Move to Permanent Stage

After the Rosetta system performs the enrichment, the SIP is moved to the Permanent Repository. The Permanent Repository is intended to store Producer Agent content that was approved by staff users for permanent preservation. As a result, SIPs that are stored in the Permanent Repository cannot be updated, deleted, or rearranged.

For general information on storing the SIPs in the Permanent Repository, see [Storage Components in the Rosetta Overview Guide](#).

SIP Routing Rules

Deposit Managers can determine how SIP submission errors are handled by the system. An error in a SIP submission may cause the SIP to be rejected or it may be routed to a Technical Analyst for further evaluation.

To access the list of SIP routing rules, follow the path from the Rosetta rollover menu: Submissions > Advanced Tools > SIP Routing Rules.

Order	Name	Description	Creation Date	Modification Date			
1	General digital material		22/05/2017 09:09:05		Update	Duplicate	Delete
2	One time publications		22/05/2017 09:09:05		Update	Duplicate	Delete
3	Periodic publications		22/05/2017 09:09:05		Update	Duplicate	Delete
4	Rosetta METS deposit		22/05/2017 09:09:05		Update	Duplicate	Delete

Name	Description	Creation Date	Modification Date
Default		22/05/2017 09:09:05	Update

SIP Routing Rules



The default rule for error handling appears in the list along with any other SIP error handling rules your institution has added. You can work with rules in one of the following ways, all of which take you to the Rule Details page ([SIP Routing Rules](#)).

- To add a new rule, click the Add Rule button.
- To edit an existing rule, click the Update text of the rule's row.
- To create a rule based closely on an existing rule, click the Duplicate text of the rule's row.

You can also delete a rule by clicking the Delete text of the rule's row.

The screenshot shows the 'Rule Editor' interface for SIP Routing Rules. At the top, there is a breadcrumb trail: 'Submissions: SIP Routing Rules / Details'. Below this is the 'Rule Editor' section, which includes fields for '* Name' and 'Description'. It also displays metadata: 'Created By: John Smith', 'Created on: 22/05/2017 12:24:27', 'Updated By: Ex Libris', and 'Last Update on: 22/05/2017 12:24:27'. The 'Input General Parameters' section contains a table with columns for 'Parameter', 'Operator', and 'Value'. The parameters listed are 'Material Flow', 'Material Type', 'Producer', and 'Producer Group', each with an 'Any' operator and 'Any' value. The 'Output Parameters' section contains a table with columns for 'Parameter' and 'Result'. The parameters listed are 'Approver Group' (Result: 'Published Approver'), 'Department' (Result: 'Demo Department'), and 'Process Configuration Id' (Result: 'All Other'). At the bottom right, there are 'Cancel' and 'Save' buttons.

SIP Routing Rules - Rule Details

On the Rule Details page, you can add or edit the Name or Description fields in the Rule Editor section. For the Input General Parameters section, create or edit the conditions for the input that will cause the rule to take effect. Include the values that define the parameters. Refer to the [Operators Used in Rule Parameters](#) section for detailed information on commonly used operators.

Operators Used in Rule Parameters

The following operators are used for specific types of parameter data.



String Values

String values are words that are not separated by a comma (,), for example, one Producer name (John Smith), one MIME type (audio/mp3), one error code, one Format ID). String values use the following operators:

- Equal - The string and the input value must match exactly.
- Contains - The string and the input value must match partially with the '*' character.

List of Strings

A list of strings is a list of string values separated by a comma (,) sometimes populated by a widget. Lists of strings use the following operators:

- List Contains – used when each error returned should match exactly a single given error in the rule.
- List Equals - Used when the order of the items in the list and the list itself should match exactly. For example, a rule defined as “Invalid page dictionary object, Invalid object number in cross-reference stream” will match to the actual output from JHOVE – “Invalid page dictionary object, Invalid object number in cross-reference stream.”

Numeric Fields

Numeric fields (for example, file size) use numbers as matching and comparison values.

- Greater Than (>) - The input value should be greater than the parameter value.
- Less Than (<) - The input value should be less than the parameter value.
- Equal (=) - The input value should be equal to the parameter value.
- Not Equal (! =) - The input value should be not equal to the parameter value.

Date Fields

Date fields (such as Creation Date) compare date values with time operators.

- After - The input date should be later than the parameter date value.
- Before - The input date should be earlier than the parameter date value.
- Equal (=) - The input date should be the same as the parameter date value.
- Not Equal (! =) - The input date should not be the same as the date parameter value.

Any

All fields can use this operator for indicating that any input value will be accepted by the rule. For example, if the $\lambda \in \sim \text{Any} \lambda \in \text{TM}$ operator is used in the Producer Name field, the rule can match all Producers.

The following table summarizes the possibilities for matching between the rule parameter values and the run-time values:

Possible Matches Between Rule Parameter and Run-Time Values

Run-time Value	Operator	Possible Rule Values	Result
Demo Producer	Equal	Demo Producer	Match
Demo Producer	Contains	Demo*	Match
image/tiff or image/bmp	In List	Image/tiff, image/bmp	Match



Run-time Value	Operator	Possible Rule Values	Result
image/tiff, image/bmp	List Equals	Image/tiff, image/bmp	Match
grey or gray	In List with Regular Expression	gr[ea]y	Match
12345	<, >, =, !=	10000	< - No match > - Match = - No match != - Match
23/11/2011	Before, After, =, !=	23/11/2011	Before - No match After - No match = - Match != - No match

To define Boolean logic when using multiple conditions, select one of the following options between conditions:

- OR
- AND (default)

The Boolean connector between different types of attributes (for example, IE Attributes and File Attributes) is always AND.

Defining SIP Processing Configuration

The SIP processing configuration determines how the SIP is processed at each stage. Deposit Managers define this on the SIP Processing Configuration List page.

To access this page, follow the path from the Rosetta rollover menu: Submissions > Advanced Tools > SIP Processing Configuration.

Active	Name	Description	Created Date	Updated Date				
<input checked="" type="checkbox"/>	All Other	Any SIP that does not conform to one of the ...		21/03/2017 11:53:05	View	Update	Duplicate	Delete
<input checked="" type="checkbox"/>	General Digital Material	All SIPs using generic or staff-mediated MF ...		21/03/2017 11:53:13	View	Update	Duplicate	Delete
<input checked="" type="checkbox"/>	General Published Material	All SIPs using a generic MF; producer (group) ...	03/07/2016 09:23:31	21/03/2017 11:53:16	View	Update	Duplicate	Delete
<input checked="" type="checkbox"/>	HarvestingProcConf	HarvestingProcConf	08/01/2017 09:52:39	21/03/2017 11:53:21	View	Update	Duplicate	Delete
<input checked="" type="checkbox"/>	HarvestingProcConf	HarvestingProcConf	22/03/2017 09:04:09	22/03/2017 09:04:09	View	Update	Duplicate	Delete
<input checked="" type="checkbox"/>	New Configuration7e		26/12/2016 08:14:27	21/03/2017 11:53:27	View	Update	Duplicate	Delete
<input checked="" type="checkbox"/>	New Configurationm2D		26/12/2016 05:56:34	21/03/2017 11:53:32	View	Update	Duplicate	Delete
<input checked="" type="checkbox"/>	New ConfigurationR8k		26/12/2016 06:18:49	21/03/2017 11:53:37	View	Update	Duplicate	Delete
<input checked="" type="checkbox"/>	New ConfigurationR9u		26/12/2016 06:47:55	21/03/2017 11:53:41	View	Update	Duplicate	Delete
<input checked="" type="checkbox"/>	PconfigurationSeleniumv8R		26/12/2016 19:14:40	21/03/2017 11:53:59	View	Update	Duplicate	Delete

SIP Processing Configuration List Page

The following actions can be performed on the SIP Processing Configuration List page:

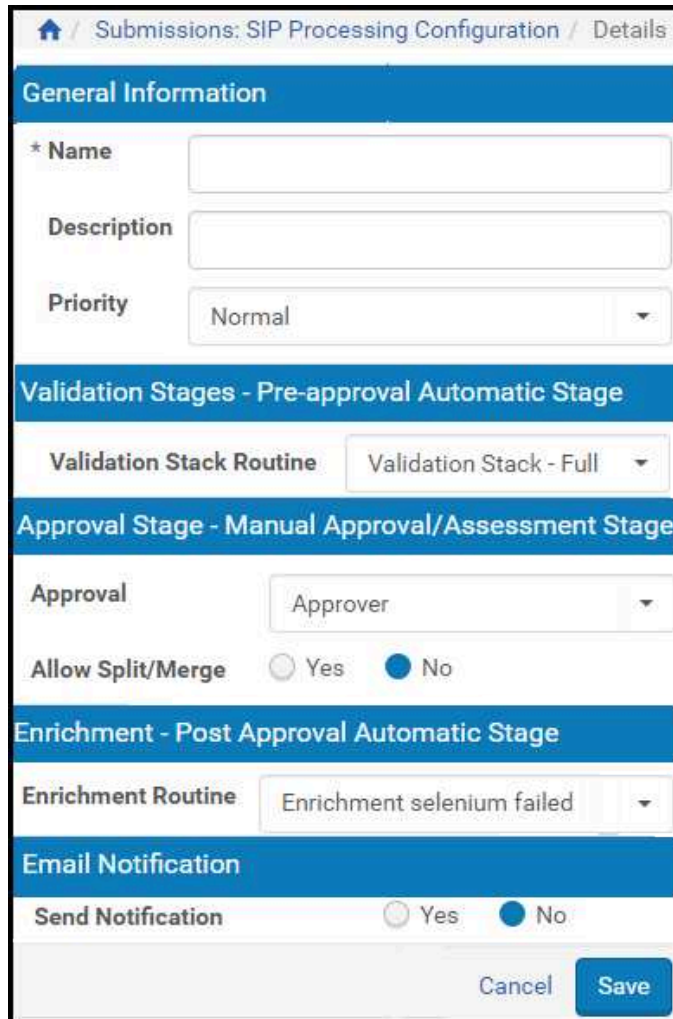
- [Adding a SIP Processing Configuration](#)
- [Updating a SIP Processing Configuration](#)
- [Duplicating a SIP Processing Configuration](#)
- [Deleting a SIP Processing Configuration](#)
- [Activating and Deactivating a SIP Processing Configuration](#)



Adding a SIP Processing Configuration

Deposit Managers can add a new SIP processing configuration.
To add a SIP processing configuration:

1. On the List of SIP Processing Configuration page (see [Defining SIP Processing Configuration](#)), click Add Processing Configuration. The SIP Processing Configuration page opens.



The screenshot shows a web form titled "Submissions: SIP Processing Configuration / Details". The form is divided into several sections:

- General Information:** Includes fields for * Name, Description, and Priority (set to Normal).
- Validation Stages - Pre-approval Automatic Stage:** Includes a dropdown for Validation Stack Routine (set to Validation Stack - Full).
- Approval Stage - Manual Approval/Assessment Stage:** Includes a dropdown for Approval (set to Approver) and radio buttons for Allow Split/Merge (Yes/No, with No selected).
- Enrichment - Post Approval Automatic Stage:** Includes a dropdown for Enrichment Routine (set to Enrichment selenium failed).
- Email Notification:** Includes radio buttons for Send Notification (Yes/No, with No selected).

At the bottom right, there are "Cancel" and "Save" buttons.

Add SIP Processing Configuration Page

2. Complete the fields as described in the following table:

SIP Processing Configuration Page Fields

Field	Description
Name	The name of the SIP processing configuration.
Description	The description of the SIP processing configuration.



Field	Description
Priority	<p>Select a priority:</p> <ul style="list-style-type: none"> • High - Process ASAP • Normal - SIPs are queued up to 1 hour • Low - SIPs are queued up to 6 hours
Validation Stack Routine	The list of available routines that can be executed when the SIP enters the validation stage.
Approval	<p>The list of available options for the human stage of the SIP processing (for example, reviewing a SIP by an Approver). The following options are available:</p> <ul style="list-style-type: none"> • Assessor + Arranger • Approver
Allow Split / Merge	Allow the ability to split and merge IEs. For more information, see Organizing IEs .
Enrichment Routine	The list of available routines that can be executed when the SIP enters the enrichment stage.
Delete SIP when processing complete	Deletes SIPs immediately after processing is completed
Send Notification	Whether you want notification of the results emailed to the staff user

All fields with an asterisk (*) are mandatory.

3. Click Save.

The new SIP processing configuration is saved in the Rosetta system.

Updating a SIP Processing Configuration

Deposit Managers can update an existing SIP processing configuration. The parameters that can be changed include the validation stack routine, the human approval process, and the enrichment routine.

To update a SIP processing configuration:

1. On the List of SIP Processing Configuration page (see [Defining SIP Processing Configuration](#)), locate the SIP processing configuration with which you want to work and click Update. The SIP Processing Configuration page opens.
2. Modify the fields as described in the table above.
3. Click Save.

The updated SIP processing configuration is saved in the Rosetta system.

Duplicating a SIP Processing Configuration

Deposit Managers can duplicate an existing SIP processing configuration. This is especially helpful when creating a new



SIP processing configuration. It is often faster to duplicate an existing SIP processing configuration and then modify it, than to create a new configuration.

To duplicate a SIP processing configuration:

On the List of SIP Processing Configuration page (see [Defining SIP Processing Configuration](#)), locate the SIP processing configuration that you want to duplicate and click Duplicate.

An exact copy of the SIP processing configuration is added to the List of SIP Processing Configuration page. The Rosetta system automatically labels the new SIP processing configuration with the name Copy of followed by the name of the original SIP processing configuration.

Deleting a SIP Processing Configuration

Deposit Managers can delete an existing SIP processing configuration.

Any SIPs in progress that are associated with a deleted SIP processing configuration will complete their processing according to the deleted configuration's instructions.

To delete a SIP processing configuration:

1. On the List of SIP Processing Configuration page (see [Defining SIP Processing Configuration](#)), locate the SIP processing configuration that you want to delete and click More. Additional options are displayed.
2. Click Delete. The Delete Confirmation page opens.
3. Click OK.

The system removes the SIP processing configuration from the List of SIP Processing Configuration page.

Activating and Deactivating a SIP Processing Configuration

Deposit Managers can activate or deactivate an existing SIP processing configuration.

On the List of SIP Processing Configuration page, the current status is indicated by the check mark in the Active column:

- Yellow - The SIP processing configuration is active.
- Grey - The SIP processing configuration is inactive.
Any SIPs in progress that are associated with a deactivated SIP processing configuration do not get promoted to the next processing stage.

To activate or deactivate a SIP processing configuration:

1. On the List of SIP Processing Configuration page (see [Defining SIP Processing Configuration](#)), locate the SIP processing configuration 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 SIP processing configuration is changed from active to inactive or inactive to active.

Configuring SIP Routing Rules

SIP routing rules define the SIP processing configuration that must be applied to the specific SIP.

Deposit Managers can define SIP routing rules using the List of SIP Routing Rules page. To access this page, follow the path from the Rosetta rollover menu: Submissions > Advanced Tools > SIP Routing Rules.



Submissions: SIP Routing Rules

Filter: All Find in All Go

Add Rule 1 - 4 of 4 Records

	Order	Name	Description	Creation Date	Modification Date			
1	✓	General digital material		22/05/2017 09:09:05		Update	Duplicate	Delete
2	✓	One time publications		22/05/2017 09:09:05		Update	Duplicate	Delete
3	✓	Periodic publications		22/05/2017 09:09:05		Update	Duplicate	Delete
4	✓	Rosetta METS deposit		22/05/2017 09:09:05		Update	Duplicate	Delete

1 - 4 of 4 Records

Default Rule:

Name	Description	Creation Date	Modification Date
Default		22/05/2017 09:09:05	Update

Back

SIP Routing Rules List Page

The following actions can be performed on the SIP Routing Rules List page:

- [Adding a SIP Routing Rule](#)
- [Updating a SIP Routing Rule](#)
- [Duplicating a SIP Routing Rule](#)
- [Deleting a SIP Routing Rule](#)
- [Activating and Deactivating a SIP Routing Rule](#)

Adding a SIP Routing Rule

Deposit Managers can add a new SIP routing rule. When adding a new SIP routing rule, Deposit Managers provide information in two panes:

- In the Input Parameters pane, matching criteria parameters are defined.
- In the Output Parameters pane, result parameters are defined.

The Rosetta system determines the input and output parameters. Deposit Managers cannot add or delete these parameters.

The logical relationship between the input parameters or the output parameters is AND. Deposit Managers cannot change the logical relationship between the parameters.

To add a SIP routing rule:

1. On the List of SIP Routing Rules page (see [Configuring SIP Routing Rules](#)), click Add Routing Rule. The Routing Rule Editor page opens.



Submissions: SIP Routing Rules / Details

Rule Editor

* Name

Description

Created By: John Smith Created on: 22/05/2017 12:24:27
 Updated By: Ex Libris Last Update on: 22/05/2017 12:24:27

Input General Parameters

Parameter	Operator	Value
Material Flow *	Any ▼	Any ▼
Material Type *	Any ▼	Any ▼
Producer *	Any ▼	Any ▼
Producer Group *	Any ▼	Any ▼

Output Parameters:

Parameter	Result
Approver Group *	Published Approver ▼
Department *	Demo Department ▼
Process Configuration Id *	All Other ▼

Cancel Save

Routing Rule Editor Page

- In the Input General Parameters pane, complete the following fields:
 Input General Parameters Pane Fields

Column	Description
Operator	The list of available operators. The operator describes the logical relationship between the parameter and the value. The values in the drop-down list vary according to the type of parameter. For more details, see Operators Used in Rule Parameters .
Value	The value for the parameter. For example, the department output parameter must contain "Academic." The value is either a text input box or a drop-down list, depending on the type of parameter.

- In the Output Parameters pane, complete the following fields:



Output Parameters Pane Fields

Column	Description
Approver Group	The approver group to which the SIP must be forwarded.
Department	The department to which the SIP is connected.
Process Configuration ID	The process configuration ID that is applied to the SIP. For more information about SIP processing configuration, see Defining SIP Processing Configuration .

4. Click Save.

The new SIP routing rule is saved in the Rosetta system.

Updating a SIP Routing Rule

Deposit Managers can update both the input and output parameter information of an existing SIP routing rule. To update a SIP routing rule:

1. On the List of SIP Routing Rules page (see [Configuring SIP Routing Rules](#)), locate the SIP routing rule with which you want to work and click Update. The Routing Rule Editor page is displayed.
2. In the Input General Parameters pane, modify the fields that you want to update.
3. In the Output Parameters pane, modify the fields that you want to update.
4. Click Save.

The updated SIP routing rule information is saved in the Rosetta system.

Duplicating a SIP Routing Rule

Deposit Managers can duplicate an existing SIP routing rule. This is especially helpful when creating a new SIP routing rule. It is often faster to duplicate an existing SIP routing rule and then modify it than to create a new SIP routing rule.

To duplicate a SIP routing rule:

On the List of SIP Routing Rules page (see [Configuring SIP Routing Rules](#)), locate the SIP routing rule you want to duplicate and click Duplicate.

An exact copy of the SIP routing rule is added to the List of SIP Routing Rules page. The Rosetta system automatically labels the new SIP routing rule with the name Copy of followed by the name of the original SIP routing rule.

Deleting a SIP Routing Rule

Deposit Managers can delete an existing SIP routing rule.

To delete a SIP routing rule:

1. On the List of SIP Routing Rules page (see [Configuring SIP Routing Rules](#)), locate the SIP routing rule you want to delete and click Delete. The confirmation window is displayed.
2. Click OK.

The SIP routing rule is deleted from the Rosetta system.



Activating and Deactivating a SIP Routing Rule

Deposit Managers can activate or deactivate an existing SIP routing rule. After a routing rule is deactivated, it is no longer used by the Rosetta system.

On the List of SIP Routing Rules page, the current status is indicated by the check mark in the Active column:

- Yellow - The SIP routing rule is active.
- Grey - The SIP routing rule is inactive.

To activate or deactivate a SIP routing rule:

1. On the List of SIP Routing Rules page (see [Configuring SIP Routing Rules](#)), locate the SIP routing rule 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 SIP routing rule is changed from active to inactive, or inactive to active, depending on the previous state of the rule.



OAI-PMH Harvester

Overview

The OAI-PMH Harvester allows users to load objects into Rosetta directly from an OAI-PMH digital repository. It has two modes of operation:

- Loading new objects into Rosetta
- Updating objects already existing in Rosetta – This mode can be divided in to two scenarios:
 - Content originally created in Rosetta – This typically means that the metadata was harvested and enriched by an external system and is now being passed back to Rosetta for harvesting. In this case, the match is on the Rosetta PID.
 - Content originally created outside of Rosetta – This refers to content that was loaded previously into Rosetta but continues to be maintained in an external system. The latter is now sending updates to those previously loaded records. In this case, the match is on the original system ID, as stored in the DNX.

Loading New Objects

When loading new objects, the OAI-PMH Harvester job creates SIPs for loading with a Submission Job (see [Submission Jobs](#)). Users can choose to create SIPs in either METS or Dublin Core format and schedule harvests to run at given time intervals. You can use this job for migration purposes, or for ongoing loading from an external repository into Rosetta (for example, to preserve data managed by another repository).

Updating Existing Objects

When updating existing objects, indicate if the content being harvested is of Rosetta origin or an external repository origin. If the content is of external origin, indicate the material flow to be used when loading new objects. If the content is of Rosetta origin, you can indicate a qualifier and string with which to match. Upon matching, the harvester can either create an update MD package with the new (transformed) metadata or ignore the changes. You can select one of the existing Update MD jobs for which the harvester creates a package or select an option to ignore the record.

Creating the OAI_PMH Harvest Job

This section describes the procedure for creating an OAI-PMH harvest job.
To create an OAI-PMH new harvest job:

1. Under Deposits > Jobs > OAI Harvester Job click Add Job.



Deposit: OAI Harvester Job / Details

Name: OAI-PMH Harvester

Scheduling

No Scheduling
[Hourly](#)
[Daily](#)
[Weekly](#)
[Monthly](#)
[Advanced](#)

Start At
 Time: 12 : 36
 Date: 09/01/2024
 Repeat: Indefinitely
 Until
 Perform Every: 1 Hour/s

Job Parameters

Base URL:

Sets: 0 items selected

User Name: Password:

Metadata Prefix:

Ignore Last Run Time:

Match:

XSL File:

Material Flow: *

Test Area

Email Notification

Send email?:

OAI-PMH Harvester

2. Enter a name for your job (for example, Fedora Harvest)
3. Schedule your job.
Rosetta appends the previously run and current timestamps to OAI-PMH harvest requests. This is not affected by your scheduling preferences.
4. Enter the OAI-PMH harvesting parameters as described in the following table:

OAI-PMH Harvesting Parameters

Parameter	Explanation	Mandatory?
Base URL	The OAI-PMH server base URL (for example: host:port/oaiprovider/request)	Yes
Connect and Edit	Select to populate the Set and Metadata Prefix fields with data from the base URL.	
Sets	The OAI-PMH selective harvesting setSpec element. Select all that apply.	No
Metadata Prefix	The OAI-PMH metadataPrefix element	Yes



Parameter	Explanation	Mandatory?
User Name	Used for OAI-PMH servers that require login. If defined, a basic authentication header is sent with the request	No
Password	Used for OAI-PMH servers that require login. If defined, a basic authentication header is sent with the request	No
Ignore Last Run Time	Select to disregard the last run time.	No
Match	Select from the drop-down list: <ul style="list-style-type: none"> • OAI Header ID – Imported records originate in an external repository • Other identifiers of the following type: <ul style="list-style-type: none"> • Identifier (DC) • Identifier (DCTERMS) 	Yes
Qualifier	(Available with Rosetta Origin) Identifier of the DC record.	No
Contains String	(Available with Rosetta Origin) The string at the beginning of the DC record.	No
XSL File	Transforms OAI-PMH records to Rosetta METS/Dublin Core records. If no XSL file is selected, the default XSL that transforms to DC is used.	No
Material Flow	(Available with External Repository Origin or Do Not Match) The Rosetta Material Flow used when importing new records, which is used to generate/process the SIPs	Yes
Update Metadata Job	Select the metadata job to update records or (with external origin) select to not update.	Yes

5. You can test the job to test connectability and record transformation and match per selected job configuration.

- From the Set drop-down list, select the set in which the source record is located.
- From the Record drop-down list, select one of the following options:
 - First – the first record
 - Random – Rosetta picks a record at random
 - By Identifier – Enter the ID of the record that you want Rosetta to test
- Click Test

If the test is successful, the following occurs:

- Success appears in the Status field.
- The source record appears in the Source field.



- The transformed record appears in the Transformed Record field.
- If a match is found, the IE PID of the matched record appears (unless Do not match was selected). If no match is found, No match found appears.

Test Example

- A key to Rosetta OAI-PMH harvesting is the location of the reference to the filestreams in the metadata. The OAI-PMH record must provide a URI that Rosetta can access (either via HTTP or NFS) to obtain the files. Depending on the xslt transformation, these references are either placed in the METS fileSec or the DC stream source field (defined in the DC content structure configuration). Rosetta does not harvest the filestreams during OAI-PMH metadata harvest – this is done during the submission itself.
 - The selected material flow and the xslt transformation file must be aligned. For example, if the material flow uses a METS content structure, you must select an xslt transformation that produces METS. Rosetta provides built-in examples for xslt transformation. To add/edit xslt transformers, go to Deposits > Advanced Tools > OAI Harvester Transformation.
 - To create a dedicated submission job for processing OAI-PMH harvested records, you must also configure a dedicated material flow for the harvester and the submission job.
 - The OAI-PMH harvester job places a lock file (.locked) in the submission folders it creates and removes the lock only after the job is completed. The submission job does not process a folder with a lock file. See ([About Submission Jobs](#)) for more details.
 - Rosetta generates one SIP for every OAI-PMH response. If the OAI-PMH server returns a resumption token, another request is sent and another SIP is generated from each subsequent response. The number of IEs depends on the number of records returned per response. For large IEs, it is therefore recommended to configure the OAI-PMH server to return fewer records per response.
 - It is generally recommended to use a Dublin Core content structure and material flow for simple objects (IEs with one representation). If you need to apply more complex logic (for example, map streams to separate representations) use a METS flow.
 - Rosetta stores the OAI identifier header in the IE Original Object Identifier DNX field. This is done either by direct mapping (in the case of METS transformation) or indirect mapping. (Rosetta stored this information in a temporary DC field, which is later mapped to IE Original Object Identifier.) If you select External Repository Origin, Rosetta searches the repository for other records (within the same institution) based on this field and value.
 - The harvesting job ignores OAI-PMH records that have a Deleted status.
6. From the Send Email? drop-down list, you have the following options:
 - No (default)
 - Yes (if there was work)
 - On failure only
The email contains a report/log file for the job.
 7. Click the Apply button to add the job to the list of OAI-PMH harvest jobs.



Viewing the OAI-PMH Harvest Job History

You can view the history of the OAI-PMH harvest job.

To view the history of the OAI-PMH harvest job:

From the OAI Harvester Job page, click the History link for a job. The OAI Harvester Job History page opens:

Deposits ▾ Submissions ▾ Data Management ▾ Preservation ▾

Home / Deposits: OAI Harvester Job / Details

Name	OAI-PMH Harvester8uP	Frequency	Every 1 hour/s	Previous Fire Time	02/03/2017 19:45:19
Role	Repository	From Date	02/03/2020 19:44:00	Next Fire Time	02/03/2020 19:44:00
State	Normal	Until Date	-		

Job Parameters

Base URL	http://localhost:1801/oaiprovider/request		
Set	PublishingSetForHarvestingDC (not listed)	Metadata Prefix	oai_dc
User Name	admin1	Password	*****
Ignore Last Run Time	<input type="checkbox"/>		
Match	Do not match (duplicate)		
XSL File	-		
Material Flow	Selenium Harvester DC MF		

History

Filter: All ▾

1 - 1 of 1 Runs

	Status	Start Time ▾	Duration		
1	Complete with warnings	02/03/2017 19:45:19	0 min, 5 sec	View Log	Download

1 - 1 of 1 Runs

[Back](#) [Refresh](#)

OAI Harvester Job History

A list of times the job ran is displayed. The following actions are available:

- Click View Log to see the log of the job.
- Click Download to download the job log.



Negotiators

This page was not added to the PDF due to the following tag(s): article:topic-guide



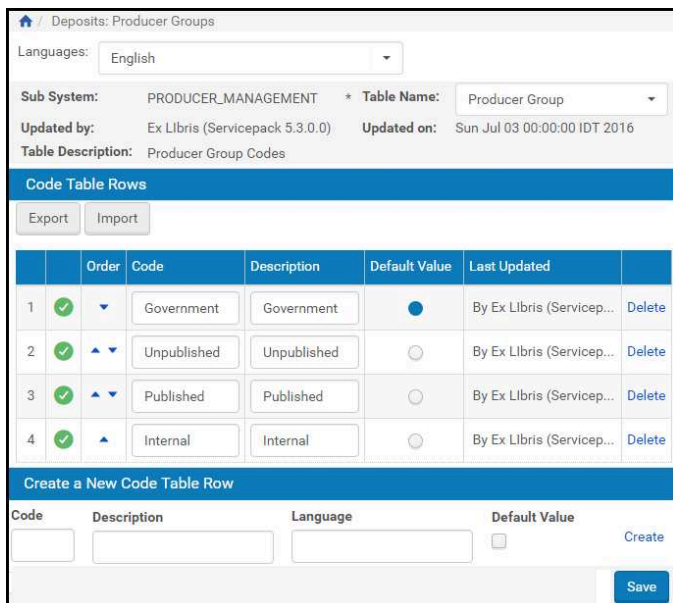
Understanding Negotiators

Negotiators are responsible for working with Producers and tailoring the generic deposit configuration of the Rosetta system to the needs of specific Producers.

Negotiators are assigned by a User Manager who registers Negotiators and defines their privileges. Negotiators can be assigned one of three types of permissions: View (no editing of data), Typical (add/edit privileges but no delete), or Full (add/edit and delete privileges). Their scope is institutional.

Producers are associated with negotiators through Producer Groups (not to be confused with a group-type producer). Negotiators can assign a producer to a producer group if that group is part of the negotiator's scope (see [Add Producer Account Process](#)).

Producer groups are managed via the Producer Group Code Table, which can be edited under Deposits > Producers and Agents > Producer Groups.



Deposits: Producer Groups

Languages: English

Sub System: PRODUCER_MANAGEMENT * Table Name: Producer Group

Updated by: Ex Libris (Servicepack 5.3.0.0) Updated on: Sun Jul 03 00:00:00 IDT 2016

Table Description: Producer Group Codes

Code Table Rows

Export Import

	Order	Code	Description	Default Value	Last Updated	
1	✓	Government	Government	<input checked="" type="radio"/>	By Ex Libris (Servicep...	Delete
2	✓	Unpublished	Unpublished	<input type="radio"/>	By Ex Libris (Servicep...	Delete
3	✓	Published	Published	<input type="radio"/>	By Ex Libris (Servicep...	Delete
4	✓	Internal	Internal	<input type="radio"/>	By Ex Libris (Servicep...	Delete

Create a New Code Table Row

Code Description Language Default Value Create

Producer Group Code Table

To assign/unassign a producer group to/from a negotiator, edit the negotiator's Role Parameters in User Management. For more information, see the User Management chapter of the Rosetta Configuration Guide.



Managing Producers

About Managing Producers

Negotiators manage Producers and the Producer Agents that deposit content in the Rosetta system. Negotiators perform this work on the Manage Producers page.

Accessing the Manage Producers Page

The Manage Producers page enables Negotiators to perform tasks such as adding a new Producer account, updating Producer account details, and performing other related activities such as linking Producer Agents to Producers, assigning and personalizing Material Flows for Producers, and depositing material on behalf of Producers. To access the Manage Producers page, from the Rosetta rollover menu, follow the path: Deposits > Producers and Agents > Producers.

The Manage Producers page opens:

Active	ID	Name	Type	Producer Group	Negotiator	View	Update	Staff Deposit	Producer Agents	Delete	Assign Negotiator	Reports
<input checked="" type="checkbox"/>	68739	Demo Internal Producer	Trusted	Government	No Negotiator	View	Update	Staff Deposit	Producer Agents	Delete	Assign Negotiator	Reports
<input checked="" type="checkbox"/>	68707	Harvester Producer	Registered	Unpublished	No Negotiator	View	Update	Staff Deposit	Producer Agents	Delete	Assign Negotiator	Reports

Manage Producer s Page/Producer List

The page contains information for all Producers and links for actions that can be taken for each, such as updating their information, viewing their details and creating new Producer Agents. The columns contain the following information:

The Producer List page

Columns

Description

ID The Producer ID (system-generated)

Active

- Yellow = active.
- Grey = inactive.

Check mark indicates the Producer account status, active or inactive.

Click the check mark to toggle between the two statuses.

Name

Displays the name of the Producer.

Type

Displays the type of Producer. For more information on the Producer types, see the Rosetta Overview Guide.



Columns	Description
Producer Group	Displays the group to which the Producer belongs.
Negotiator	Displays the user name of the Negotiator who is assigned to the Producer.

Searching, Filtering, and Sorting Producers

Negotiators can search for, filter, and sort Producers using the Manage Producers page.

To search for Producers:

1. On the Producers List page (Deposits > Producers and Agents > Producers), in the Find field, enter the name or ID of the Producer.
2. In the In drop-down list, select the database field in which the Rosetta system should search for the Producer.
3. Click Go.

The results are returned on the Manage Producers page.

To search for Producers using an advanced search:

1. From the Manage Producers page, click advanced search in the upper right corner. The simple search is replaced by an advanced search, which includes the Add Conditions button and the link back to the Simple search.
2. Click the Add Conditions button. An Add Conditions box opens with Producer attributes listed.

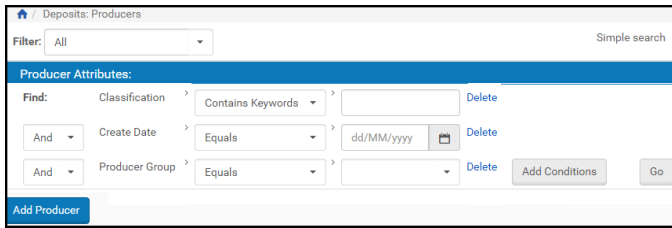
Add Conditions Box

3. Select the check boxes for one or more attributes you want to search.



4. Click Add Fields.

The conditions box closes and the fields you selected display in the search area.



Advanced Producer Search, 3 Conditions

5. Select a relational term from the first drop-down menu in the first row, then enter a value by whichever means the attribute calls for (free text or drop-down menu, for example).
6. If you have subsequent rows, for each row, you can change the logical operator (And by default) to one of the options from the drop-down menu.
7. When you have entered all your conditions, click the Go button to conduct the search.

The system returns Producers that match the terms of your search.

To filter Producers:

On the Manage Producers page (Deposits > Producers and Agents > Producers), in the Filter drop-down list, select one of the following options:

- All, when you want to view the unfiltered list of all Producers
- My Producers, when you want to view only those Producers that are assigned to you
- My Groups, when you want to view Producers in groups assigned to you

The list of Producers is filtered according to the option you selected.

To sort Producers:

On the Manage Producers page (Deposits > Producers and Agents > Producers), click any column heading to sort the list according to the contents of the selected column. The column heading is highlighted.

In addition, because both ascending and descending sequences are supported, the column heading indicates whether the column is sorted in an ascending or descending order.

The default sort order is by Producer Name and Status Date.

Adding a Producer Account

Negotiators can add Producer accounts to the Rosetta system using an Add Producer Account wizard. The wizard guides the Negotiator through adding a Producer account, individual or group, and entering details about the Producer. The last page of the wizard allows the Negotiator to add Producer Agents to the account. Once this is done, Producer Agents can register in the system and begin depositing content on behalf of the Producer with whom they are associated.

Producers can also self-register. For information, see the Rosetta Producer's Guide.

For more information about accounts, see [Individual Versus Group Producers](#).

To go directly to the adding a Producer account procedure, see [Add Producer Account Process](#).

Individual Versus Group Producers

Negotiators adding a Producer account must determine if the account will be of an Individual or Group type.

Individual accounts consist of a single Producer representing themselves and depositing on their own behalf. The



Producer Agent who performs the depositing is, by default, the same individual. However, additional Producer Agents can be added to the account.
Group accounts consist of a Producer representing an institution and a number of Producer Agents depositing material on behalf of the institution. Group accounts also consist of Contacts of the institution.

Add Producer Account Process

The process of adding a Producer account consists of the following tasks:

- Deciding whether the account will be an individual or group account and selecting a choice from the wizard
- Providing information about a Producer group or individual, such as Producer classification and status, along with general information such as telephone number and address. For individual accounts, this is the final required step.
- Adding Producer Agents. For individual accounts, this step is optional because a Producer Agent has already been assigned (the same individual as the Producer). Group accounts must assign at least one Producer Agent to deposit material.
- For group accounts only, adding Contacts.

To add a Producer account:

1. On the Manage Producers page (Deposits > Producers and Agents > Producers), above the list of Producers, click Add Producer.
Step 1 of the Add Producer wizard, Select Account Type for the Producer, opens.
2. Select Individual or Group type. See [Individual Versus Group Producers](#) for more information.
3. Click Next.
The Producer Details page opens. Some fields vary depending on account type (individual versus group, selected earlier.).
If you are creating an individual account, the wizard will display three steps. If you are creating a group account, the wizard will display four steps.



Deposits: Producers / Details

ID	-	Creation Date	29/05/2017	Created by	admin1
Name	-	Updated on	29/05/2017	Updated by	admin1
Account Type	Group				

General Information

* Authoritative Name

Producer Group Producer Type

Classification Negotiator John Smith

Status Active Status Date 29/05/2017

Local Producer Field 1

Producer Profile information

* Profile

Producer Information

* Institution * Department

* Telephone 1 Telephone 2

Adding a Producer for a Group Account

4. In the Producer Information pane, complete the fields as described in the following table:
 Producer Information Fields

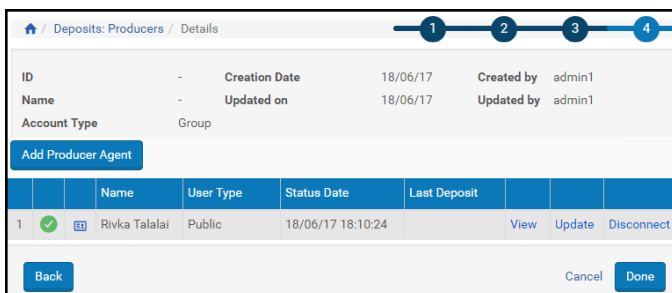
Field	Description
Authoritative Name	The name of the Producer.
Producer Group	Used to assign several Producers to a Negotiator. Negotiators can work with Producers in their assigned groups.
Classification	The classification of the Producer. Options (such as government or publishers) display in a drop-down list that is populated through the Back Office Administrator.
Status	<p>The Producer account status:</p> <ul style="list-style-type: none"> Active - Producer Agents can use the Rosetta system to deposit content. Inactive - Producer Agents cannot use the Rosetta system to deposit content. However, the account is still saved in the system.
Producer Type	<p>The Producer type that governs how associated Producer Agents deposit content. The following options are available:</p> <ul style="list-style-type: none"> Casual Registered Trusted



Field	Description
	<ul style="list-style-type: none"> Internal <p>For more information on Producer types, see the Rosetta Overview Guide.</p>
Negotiator	The Negotiator who is responsible for managing this Producer.
Status Date	The last date on which the Producer account details were changed.
Generic Profile	The generic profile that is used for this Producer.

Back Office Administrators can add up to two additional fields to allow Negotiators to provide additional information about Producers.

- In the General Information >pane, complete the fields that are required and any additional fields. Where Institute and Department appear on the form for a group Producer, First Name and Last Name appear respectively on the form for an individual Producer.
- Complete the required fields in the Producer Information pane.
The e-mail address you enter on this form will be used whenever someone clicks the contact icon beside this name, as shown in the figure below. Clicking the e-mail address on the Contact Information card opens a new blank message in the user's mail client. Currently this feature is supported in Microsoft Outlook.
- For individual accounts, when the form is complete, click the Next button. The ProducerAgent page opens with the Producer's information listed as the sole Producer Agent. (The Producer and the default Producer Agent share the same user record.) To add other Producer Agents, click the Add Producer Agent button and select Agents from the list. Click Add, then Done to complete this procedure.
An individual account will always have the Producer listed as the first Producer Agent. Others may be added and deleted, but the original Producer Agent cannot be removed.
For group accounts, when the form is complete, click the Next button. The Contacts page opens.
- Click the Add Contact button. The User List page opens.
- From the user list, select one or more users to be the Contact for the Producer and click Add.
If there are no users in the list, or if the user you want is not listed, you need to add the user as a Contact. Click the Add User button, enter values in the User Information form that opens, and click Save. The User List page refreshes with your new user. Select check boxes beside the user names you want as your Contacts. Click the Add button.
The Contacts page refreshes with your new user(s) in the list.
- Click Next. The Producer Agents page opens.



Producer Agents Page



10. Click Add Producer Agent. A list of potential Producer Agents opens. Select one or more to assign to the Producer and click Add.
If there are no users in the list, or if the user you want is not listed, you need to add the user as a Producer Agent. Click the Add User button, enter values in the User Information form that opens, and click Save. The User List page refreshes with your new user. Select check boxes beside the user names you want as your Producer Agents. Click the Add button. The Add Producer Agent page refreshes with your Producer Agent selections.
11. Click Done. The new Producer is added to the Producers list.

The Producer Agents associated with this Producer can now deposit content on behalf of the Producer.

Updating a Producer Account

Negotiators can update Producer account details at any time.

To update a Producer account:

1. On the Manage Producers page (see [Accessing the Manage Producers Page](#)), locate the Producer whose account details you want to update and click Update. The Update Producer page opens.
2. Modify the fields that you want to update. See the table above for details.
3. When you have finished updating the Producer information, click OK.

The Producer details are updated in the Rosetta system.

Activating and Deactivating a Producer Account

Negotiators can deactivate a Producer account when they must finish configuring the Producer account before making it available to Producer Agents, or if they want to temporarily disable the Producer account without deleting it. Negotiators can also activate an inactive Producer at any time.

On the Manage Producers page, the status of the Producer account is indicated by the check mark in the **Active** column:

- Yellow - The Producer account is active.
- Grey - The Producer account is inactive.

To activate or deactivate a Producer account:

1. On the Manage Producers page (see [Accessing the Manage Producers Page](#)), locate the Producer account 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 Producer account status is changed from active to inactive, or from inactive to active.

Deleting a Producer Account

Negotiators can delete a Producer account. After a Producer is deleted, associated Producer Agents cannot deposit content on behalf of this Producer.

To delete a Producer account:

1. On the Manage Producers page (see [Accessing the Manage Producers Page](#)), locate the Producer account that you want to delete and click Delete.



The confirmation page opens.

2. Click OK.

The Producer account is removed from the system.

Associated Producer Agents can no longer use the Producer account to deposit content.

Producer Agent Registration Process

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 during advanced configuration using the Registration Reason code table (below).

The screenshot displays the 'Deposits: 1st Time Registration Reasons' configuration page. At the top, there are fields for 'Languages' (set to English), 'Sub System' (PRODUCER_MANAGEMENT), 'Table Name' (Registration Reason), 'Updated by' (Ex Libris (Servicepack 5.3.0.0)), and 'Updated on' (Sun Jul 03 00:00:00 IDT 2016). Below this is a 'Code Table Rows' section with 'Export' and 'Import' buttons. A table lists two rows:

Order	Code	Description	Default Value	Last Updated
1	unpublished	I plan to deposit unpublished material	<input type="radio"/>	By Ex Libris (Servicep... Delete
2	published	I plan to deposit published material	<input checked="" type="radio"/>	By Ex Libris (Servicep... Delete

Below the table is a 'Create a New Code Table Row' form with fields for 'Code', 'Description', 'Language', and 'Default Value', along with 'Create' and 'Save' buttons.

Registration Reason Code Table

Administrators can add, edit, export, or import rows in the table.

To access the Registration Reason code table, from the Advanced Configuration page, click Deposits > Producers and Agents > 1st-Time Registration Reasons.

These rules affect individual Producers only (depositing content on their own behalf). Producer agents registering to deposit content on behalf of a producer require manual approval before they can deposit.



Personalizing Producer Profiles

About Personalizing Producer Profiles

Negotiators can personalize generic Producer profiles for specific Producers. A personalized Producer profile is based on one of the existing generic Producer profiles.

Personalized profiles may include material flows and deposit control settings that are unavailable in the generic Producer profiles.

Negotiators personalize Producer profiles using the Producer Details page.

Accessing the Producer Details Page

The Producer Details page enables Negotiators to personalize generic Producer profiles for specific Producers.

1. To access the Producer Details page, from the Rosetta rollover menu, follow the path Deposits > Producers and Agents > Producers. The List of Producers page opens.
2. Locate the Producer for which you want to personalize the generic profile and click Update. The Producer Details page opens with the selected Producer's information.



Deposits: Producers / Details

ID 63953 Creation Date 18/06/17 Created by admin1
 Name Common Group Updated on 18/06/17 Updated by admin1
 Account Type Group

General Information

* Authoritative Name
 Producer Group Producer Type
 Classification Negotiator John Smith
 Status Active Status Date 18/06/17
 Local Producer Field 1

Producer Profile information

* Profile

Producer Information

* Institution * Department
 * Telephone 1 Telephone 2
 Fax
 * Email Send Reports No Yes
 Website URL
 * Street
 Suburb
 City
 Country Postal Code
 Notes

Contacts

	Primary	Name	Job Title	Telephone1	Telephone2		
1	<input checked="" type="checkbox"/>	Smith Joe		321-567-8765		Delete	Email

Producer Details Page

For more information about the fields on this page, see [Producer Information Fields](#).

Upgrading a Registered Producer Account

Negotiators can make a specific, personalized Producer profile available to a particular group of Producers. However, to be able to use a personalized profile, Producers must be defined as trusted Producers.

This section describes how to upgrade a registered Producer account to a trusted Producer account.

To upgrade a Producer account:

1. On the Producer Details page for the Producer whose account you want to upgrade (see [Accessing the Producer Details Page](#)), in the Producer Information section, select Trusted for the Producer Type field drop-down menu.
2. Click the Save button.
The system returns you to the List of Producers page.



3. Click the Update text link for the Producer whose account you want to change.
4. Click the Personalize Profile button.
The Update Producer Profile page opens.

Update Producer Profile Page

5. In the Producer Profile tab, enter information about the Producer and limits for entering information. For information on the fields, see [Configuring Deposit Control Settings](#).
6. Click the Material Flows List tab to make adjustments to material flow rules.
The tab displays a view the material flows selected for the profile and the entire pool of material flows.
7. Click OK. The Producer is upgraded to trusted.

Associated Producer Agents now can deposit content using the personalized Producer profile that is available to trusted Producers.

Personalizing a Producer's Deposit Control Settings

Negotiators can personalize deposit control settings for a specific Producer to enable the associated Producer Agents to deposit larger amounts of content.

To change a Producer's deposit control settings:

1. On the Producer Details page (see [Accessing the Producer Details Page](#)), click Personalize Profile. The Producer Profile page opens.



Deposits: Producer Profiles / Details

Profile ID 46454 Created by admin1 Created on 24/04/2017
 Profile name Demo Internal Producer - Default Updated by admin1 Updated on 24/04/2017
 Profile Type Personalized

Producer Profile Material Flow List

* Name Demo Internal Producer - Default
 Status Active Status Date 24/04/2017
 * Active Deposits Quota (GB) 0 * Default Sampling rate (%) 100
 Fast Track Enabled false

Cancel Save

Personalize Producer Profile Page

2. Modify the fields as described previously in this guide. (See [Configuring Deposit Control Settings.](#))
3. Click Save. Updated deposit control settings are saved in the Rosetta system.

Associated Producer Agents can now deposit content using the updated deposit settings.

Assigning Material Flows to a Producer Profile

Negotiators can assign additional material flows to a specific Producer to provide associated Producer Agents with more opportunities to deposit content.

To assign material flows to a Producer profile:

1. On the Producer Details page (see [Accessing the Producer Details Page](#)), click Personalize Profile. The Producer Profile page opens.
2. Click the Material Flow List tab. The Manage Material Flows page opens.

Deposits: Producer Profiles / Details

Profile ID 45399 Created by Ex Libris Created on 17/05/2017
 Profile name selenium enrichment producer profile Updated by Ex Libris Updated on 17/05/2017
 Profile Type Generic

Producer Profile Material Flow List

Producer Profile: selenium enrichment producer profile Selected

	Name	Template	Content Structure	Acquire Method	Status Date	
1	<input checked="" type="checkbox"/> selenium enrichment materialflow	Manual	SoF Complex	Http Load	01/01/1970 02:00:00	Remove

Material Flow pool

	Name	Template	Content Structure	Acquire Method	Status Date	
1	<input type="checkbox"/> AR RP CSV MF selenium	Manual	CSV selenium	HDpSubmissionFormatDetailedCSV	01/01/1970 02:00:00	
2	<input type="checkbox"/> AR RP METS MF selenium	Automated	METS	NFS	01/01/1970 02:00:00	
3	<input type="checkbox"/> Auto Generate CSV MF FOJ	Manual	Auto Generate CSV CS FOJ	HDpSubmissionFormatDetailedCSV	01/01/1970 02:00:00	
4	<input type="checkbox"/> Bagit FTP	Automated	Keren Bagit	NFS	01/01/1970 02:00:00	
5	<input type="checkbox"/> Bagit NFS	Automated	Keren Bagit	NFS	01/01/1970 02:00:00	
6	<input type="checkbox"/> Bagit SFTP	Automated	Keren Bagit	HDpSubmissionFormatDpsSFTP	01/01/1970 02:00:00	
7	<input type="checkbox"/> CSV Manual	Manual	CSV	HDpSubmissionFormatDetailedCSV	01/01/1970 02:00:00	
8	<input type="checkbox"/> Demo Bagit	Automated	Demo Bagit	NFS	01/01/1970 02:00:00	
9	<input type="checkbox"/> Email CSV MF selenium	Manual	CSV selenium	HDpSubmissionFormatDetailedCSV	01/01/1970 02:00:00	
10	<input type="checkbox"/> Email METS MF selenium	Automated	METS	NFS	01/01/1970 02:00:00	

Add Selected
Back

Manage Material Flows Page

3. Associate material flows as described in [Associating Material Flows with a Generic Producer Profile.](#)



Associated Producer Agents can now deposit content using the material flows you selected.



Personalizing Material Flows

About Personalizing Material Flows

Negotiators can personalize generic material flows for specific Producers by personalizing generic metadata forms and submission formats that are configured by Deposit Managers. For more information on generic metadata forms and submission formats, see [Configuring Material Flow Infrastructure](#).

Negotiators personalize these material flow building blocks using the Edit Material Flow page (see [Accessing the Material Flow Details Page](#)).

Accessing the Material Flow Details Page

The Material Flow Details page enables Negotiators to personalize metadata forms and submission formats that are associated with a generic material flow.

To access the Material Flow Details page:

1. Follow these links from the Home page: Deposits > Producers and Agents > Producers.
2. Click the Update text link in the row of the Producer whose material flow you want to access



Deposits: Producers / Details

ID 63953 Creation Date 18/06/17 Created by admin1
 Name Common Group Updated on 18/06/17 Updated by admin1
 Account Type Group

General Information

* Authoritative Name: Common Group
 Producer Group: Government Producer Type: Trusted
 Classification: None Negotiator: John Smith
 Status: Active Status Date: 18/06/17
 Local Producer Field 1: None

Producer Profile information

* Profile: Common Group - Default Manage Material Flows

Producer Information

* Institution: University of Anywhere * Department: Main
 * Telephone 1: 1234567 Telephone 2:
 Fax:
 * Email: univ@edu.com Send Reports: No Yes
 Website URL:
 * Street: Somewhere
 Suburb:
 City:
 Country: Afghanistan Postal Code:
 Notes:

Contacts

	Primary	Name	Job Title	Telephone1	Telephone2		
1	<input checked="" type="checkbox"/>	Smith Joe		321-567-8765		Delete	Email

Add Contact Cancel Save

Manage Producers/Producer Details Page

- Click the Manage Material Flows button.
The Producer Profile/Material Flow List page opens with information for the Producer you selected.
- In the top pane, with the Material Flow List tab selected, find the row containing the material flow you want to personalize and click the Personalize text link in the same row.
The page refreshes with the following changes to the item you personalized:
 - The Name ["MF name"] has changed to "My [MF name]"
 - The Type has changed from Generic to Personalized
 - The link Personalize is replaced by a link to Update
- Click the Update link corresponding to the material flow you are personalizing.
The Material Flow Details page opens.



Material Flow Details Page

The top section contains basic read-only information (such as ID number and date created) about the material flow itself.

All other sections contain editable text and drop-down menu fields. Fields marked with asterisks are required.

The Material Flow Definition section contains the following fields:

Material Flow Definition Fields

Field	Description
Name	The name of the material flow.
Description/Instructions	The description of the material flow.

The material flow's status:

Status	<ul style="list-style-type: none"> Active - The material flow is available to Producer Agents depositing for the Producer. Inactive - The material flow is not available to Producer Agents depositing for the Producer.
--------	--



Field	Description
Status Date	Displays the last date on which the status of the material flow was updated.
Sampling Rate	<ul style="list-style-type: none"> The percentage of deposits from this material flow that will be automatically redirected to staff users for review. <p>This requires SIP processing Approval to be set to Approver.</p>
Material Type	<p>The types of content that Producer Agents can deposit.</p> <p>This drop-down list contains the material types that were configured in advance by a Deposit Manager or Back Office Administrator. For more information, see Configuring User Static Lists in the Rosetta Configuration Guide.</p>
Assertion of Copyrights	The copyright statement to which the Producer Agent must agree in order to deposit material using this material flow definition.

The Technical Definitions section of the page contains the following fields:

Technical Definitions

Field	Description
Select Content Structure	<p>A drop-down list of content structures from which the Negotiator chooses one for the Producer.. The selected content structure is set at the material flow definition level and is fixed for this material flow.</p> <p>This drop-down list contains the content structure templates that were configured in advance by a Deposit Manager or Back Office Administrator. For more information, see Configuring Content Structures.</p>
Select Submission Format	<p>The submission format that the Producer uses when uploading files. The format is set by the Negotiator and fixed for this material flow at the material flow definition level.</p> <p>This drop-down list contains the submission formats that were configured in advance by a Deposit Manager or Back Office Administrator. For more information, see Configuring Submission Formats.</p>

The Descriptive Definitions section contains the following fields and buttons.

Descriptive Definitions

Name	Description
Select Metadata Form	<p>The metadata form that Producer Agents must complete when they deposit content.</p> <p>This drop-down list contains the metadata forms that were configured in advance by a Deposit Manager or Back Office Administrator. For more information, see Configuring Metadata Forms.</p>
Preview	Shows a preview of the form/fields for the selected Select Metadata form.
Edit MD Form	Opens a page with a Design tab and a Field tab where a user can edit information for either aspect of this material flow's metadata.
CMS	The Content Management System ID (CMS ID) assigned to this material flow definition. The field is



Name	Description
System ID	comprised of two values, a CMS system value and a CMS ID within that system. The ID is saved to the system when the Negotiator clicks the Assign CMS ID button and completes the ensuing wizard.
Assign CMS ID	Opens a short wizard that allows the Negotiator to select a CMS system value and to assign a CMS ID from that system by entering the value directly or by conducting a search for the value and selecting it from the results list. Both system value and ID are copied to the material flow when the Negotiator clicks the Link button.
Delete CMS ID	Only available when a CMS ID has been assigned. Removes the association of the CMS ID with its previously assigned material flow. The CMS ID can no longer be assigned to IEs deposited with this material flow, but IEs already deposited with the material flow will retain the existing CMS ID.
Upload Source Metadata Files	Allows a Producer Agent to upload source metadata files when depositing IEs in metadata structures other than Dublin Core. This allows your institution to store complete information for IEs conforming to complex and custom metadata schemes and to view this data in the Web editor.

The Access Rights Form section contains a list of available access rights and a list of those access rights the Negotiator can assign to this material flow. Arrow buttons allow items to be moved back and forth from one box to the other.

Adding and Deleting CMS IDs

Negotiators can add or delete CMS IDs at any point during the adding or editing of material flows. Buttons to assign CMS IDs display on the Material Flows Details page. When a CMS ID has already been assigned, an additional button for deleting the existing CMS ID displays in the Descriptive Definitions section of the page.

To assign a CMS ID to a material flow:

1. Access the Manage Producers page by clicking from the Management Home page to the Producers page to the Manage Producers page.
2. Click the Update text link in the row corresponding to the name of the Producer whose material flow you want to alter by adding or deleting a CMS ID. (If you need to add a new Producer, see [Adding a Producer Account](#).)
3. Under the Producer Profile information section, click the Manage Material Flows button. The Producer Profile/Material Flow List page opens.
4. With the Material Flow List tab selected, find the name of the material flow you want to alter and select the text link Personalize or Update in its row. (If the flow has already been personalized, only Update will show. If it has not been personalized yet, you must do so by clicking the Personalize text link.) The Material Flow Details page opens.
5. To add a CMS ID, click the Assign CMS ID button and do one of the following:
 - a. If you know the CMS ID, enter it on the first page. When you click Next, the CMS ID is assigned.
 - b. If you want to search a database for an existing CMS ID, click the Search in external DBs option, click Next, and follow the prompts provided by the wizard:
 - Enter a partial or full search string in the Find field.
 - Select a search category from the drop-down field.
 - Click Go.



- Select an ID from the list of results and click the Link button.

The CMS ID is assigned to the material flow.

6. To delete a CMS ID, click the Delete CMS ID button and click Confirm on the confirmation page. The Descriptive Definitions section of the material flow definition reflects the assignment or deletion of the CMS ID.

Personalizing Metadata Forms

Negotiators can personalize a generic metadata form for a specific Producer by adding new fields or editing existing ones.

To personalize a metadata form:

1. On the Material Flow Editor page (see [Accessing the Material Flow Details Page](#)), in the Material Flow Definition pane, click Personalize Metadata Form. The Metadata Form Editor page opens.
2. Update the fields as described in [Configuring Metadata Forms](#).
3. Click Save Form. The personalized metadata form is saved in the Rosetta system.

Associated Producer Agents can now use the metadata form that was created specifically for their Producer when providing descriptive information about deposited content.

Personalizing Submission Formats

Negotiators can personalize a generic submission format for a specific Producer to provide associated Producer Agents with more options to deposit content. Personalized submission formats are based on one of the existing generic formats. To personalize a generic submission format:

1. On the Material Flow Editor page (see [Accessing the Material Flow Details Page](#)), in the Material Flow Definition pane, click Personalize Submission Format Form. The Edit Submission Format page opens.
2. Edit the fields as described in [Configuring Submission Formats](#).
3. Click Save. The personalized submission format is saved in the Rosetta system.

Associated Producer Agents can now use the submission format settings that were created specifically for their Producer when uploading files.



Depositing Content on Behalf of a Producer

The Rosetta system enables Negotiators to deposit content on behalf of a Producer. Negotiators who deposit content are considered Producer Agents. The Rosetta system automatically creates Producer Agent accounts associated with the appropriate Producer for these Negotiators.

Like other Producer Agents, Negotiators can deposit content and manage deposit activities using the Deposit Activities page. In addition, Negotiators can use both manual and automated material flows associated with the Producer for which they are depositing content.

To deposit content on behalf of a Producer:

1. From the Rosetta drop-down menu, follow the path: Deposits > Producers and Agents > Producers.
2. The List of Producers page opens

Action	ID	Name	Type	Producer Group	Negotiator							
1	68739	Demo Internal Producer	Trusted	Government	No Negotiator	View	Update	Staff Deposit	Producer Agents	Delete	Assign Negotiator	Reports
2	66707	HarvesterProducer	Registered	Unpublished	No Negotiator	View	Update	Staff Deposit	Producer Agents	Delete	Assign Negotiator	Reports

List of Producers Page

3. Locate the Producer on whose behalf you want to deposit content and click Staff Deposit. The Deposit Activities page opens

Deposit ID	SIP ID	Title	Material Flow Type	Created On	Submitted On						
1	2281	1084	Selenium Title	Monograph	03/07/2017 23:31:12	View	Edit	Notes	Delete	History	Submit
2	2280	1084	Selenium Title	Monograph	03/07/2017 23:31:02	View	Edit	Notes	Delete	History	Submit
3	2279	1082	Selenium Title	Monograph	03/07/2017 23:30:53	View	Edit	Notes	Delete	History	Submit
4	2278	1081	Selenium Title	Monograph	03/07/2017 23:30:43	View	Edit	Notes	Delete	History	Submit
5	2277	1080	Selenium Title	Monograph	03/07/2017 23:30:33	View	Edit	Notes	Delete	History	Submit
6	2276	1079	Selenium Title	Monograph	03/07/2017 23:30:13	View	Edit	Notes	Delete	History	Submit
7	2275	1078	Selenium Title	Monograph	03/07/2017 23:30:02	View	Edit	Notes	Delete	History	Submit
8	2274	1077	Selenium Title	Monograph	03/07/2017 23:29:53	View	Edit	Notes	Delete	History	Submit
9	2273	1076	Selenium Title	Monograph	03/07/2017 23:29:43	View	Edit	Notes	Delete	History	Submit
10	2272	1075	Selenium Title	Monograph	03/07/2017 23:29:34	View	Edit	Notes	Delete	History	Submit

Deposit Activities Page

If you want to deposit content on behalf of a Producer that is not registered in the Rosetta system, you must create a new Producer account as described in [Adding a Producer Account](#).

The Rosetta system creates a Producer Agent account associated with the selected Producer. Negotiators can now use this account to deposit content and manage deposit activities. For more information on depositing content, see Depositing Content in the Rosetta Producer's Guide.



Scheduling Producer Reports

About Producer Reports

Two Producer reports are available for viewing:

- Data related to Producer deposit activity/history
- Intellectual Entity views (which and how many times)

Deposit History Report

A Deposit History report is available from the Producer List page (Deposits > Producers and Agents > Producers). It contains the following information for each Producer:

- General information about Producers: Producer ID and name, Producer creation date, Institution, Account status and Producer group
- Information about the report period.
- The following information for each deposit activity in the period:
 - Deposit Activity ID
 - SIP ID
 - Title
 - Date of Deposit
 - Name of the Depositor (Producer Agent)
- Status of the SIP and a problem description if rejected or declined.
Possible Status values are Draft, Submitted, Rejected, Declined and Approved. A deposit that has been partially approved and partially declined will have a status of Approved. A deposit that has been partially rejected will have a status of Rejected.

The Deposit History Report can be generated and e-mailed periodically to Producers that have elected to receive e-mail notifications.

The report is sent to the primary contact e-mail entered on the Producer's record. If an e-mail address is not listed for the primary contact, the report is sent to the Producer's e-mail address.

The system generates a single report for each Producer at each institution. This means that Producers who deposit to many institutions will receive one report for each institution to which they deposit material.

If there are no deposit activities in the current period, an e-mail notification will be sent to the Producer, but it will not include the report.

To e-mail these reports to Producers, Negotiators must schedule the Producer Report job to run periodically or execute the job manually. For more information, see [Managing the Producer Report Job](#).



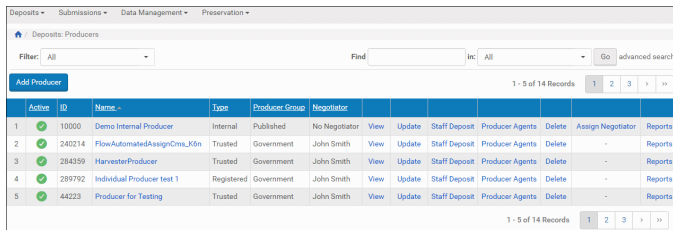
Intellectual Entity Views Report

This report provides information about which IEs were viewed and how many times each was viewed. The number of views is counted since the last time the Producer report was run, but a cumulative count for each IE is provided as well.

Viewing Producer Reports

Staff users can generate and view Producer reports on the Rosetta Management interface. To view a Producer's reports:

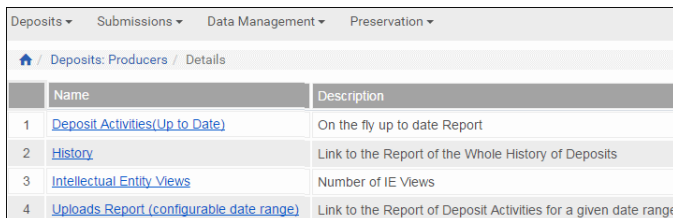
1. Follow the Rosetta drop-down menu path: Deposits > Producers and Agents > Producers. The Producer List page opens:



Active	ID	Name	Type	Producer Group	Negotiator	View	Update	Staff Deposit	Producer Agents	Delete	Assign Negotiator	Reports
1	10000	Demo Internal Producer	Internal	Published	No Negotiator	View	Update	Staff Deposit	Producer Agents	Delete	Assign Negotiator	Reports
2	240214	FlowAutomatedAssignCms_Kin	Trusted	Government	John Smith	View	Update	Staff Deposit	Producer Agents	Delete	-	Reports
3	284359	HarvesterProducer	Trusted	Government	John Smith	View	Update	Staff Deposit	Producer Agents	Delete	-	Reports
4	289792	Individual Producer test 1	Registered	Government	John Smith	View	Update	Staff Deposit	Producer Agents	Delete	-	Reports
5	44223	Producer for Testing	Trusted	Government	John Smith	View	Update	Staff Deposit	Producer Agents	Delete	-	Reports

Producer List Page

2. Click the Reports link for the Producer. The Reports page opens for the selected Producer.



Name	Description
1 Deposit Activities (Up to Date)	On the fly up to date Report
2 History	Link to the Report of the Whole History of Deposits
3 Intellectual Entity Views	Number of IE Views
4 Uploads Report (configurable date range)	Link to the Report of Deposit Activities for a given date range

Reports

3. Select one of the following links to display the BIRT report:
 - Deposit Activities (Up to Date) – Displays an up-to-date report for the Producer's deposit activities. Note that it may be different from the last report that was sent to the Producer.
 - History – Displays a report for the all of the Producer's deposit activities.
 - Intellectual Entity Views – Number of IE Views
 - Uploads Report (configurable date range) – Displays a report containing the Producer's deposit activities for a specified date range.
 - Deposit Activities (Last period) – Displays the last report that was sent to the Producer, if such exists.

Managing the Producer Report Job

The Manage Scheduled Jobs page allows Negotiators to manage the scheduling of the job that generates and e-mails the Producer Reports to Producers.



To access the Manage Scheduled Jobs page:
Follow the Rosetta drop-down menu path: Deposits > Jobs > Producers Reports Job

	Previous Fire Time	Next Fire Time	Frequency	State	History	Update	Run Now
1	02/03/2017 23:36:17	-	Cron Expression: 0/10 * * * * ? *	Not Running			

Manage Scheduled Job (Producers Report)

If the job has expired or has not been scheduled, the State column will display Not Running. The Manage Scheduled Jobs page enables Negotiators to monitor the status of the Producer Report job and perform the following tasks:

- View the job's details – Click the History link to display the job's details.
- Modify the job – For more information, see [Modifying the Producer Report Job](#).
- Run the job – Click the Run Now link to run the job manually.

In addition, you can cancel the job. For more information, see [Cancelling the Producer Report Job](#).

Modifying the Producer Report Job

This task allows Negotiators to modify the details for the Producer Report job. To schedule the Producer Report job:

1. On the Manage Scheduled Jobs page, click the Update link next to the job. The Job Details page displays the status of the job.

Name

[No Scheduling](#)
[Hourly](#)
[Daily](#)
[Weekly](#)
[Monthly](#)
[Advanced](#)

Start At

Time

Date

Repeat

Indefinitely
 Until

Job Details Page (Producer Report Job)

2. Select the interval at which to execute the job: No Scheduling, Hourly, Daily, Weekly, Monthly, and Advanced.



3. To configure hourly, daily, weekly, and monthly intervals:

a. Use the following table to configure the common interval fields:

Common Interval Fields

Section	Field	Description
Start At	Time	Select the hour and minutes from the drop-down fields to specify the time at which to run the job.
	Date	Use the calendar tool or select the month, day, and year from the drop-down fields to select the date at which to start running the job.
Repeat	Indefinitely	Select this option to run the job indefinitely.
	Until	Select the month, day, and year from the drop-down fields to specify the date at which to stop running the job. After this date, the state of the job will change from Normal to Not Running.

b. Use the following table to configure the interval-specific fields:

Interval-Specific Fields

Type of Interval	Perform this task:	Description
Hourly	Every	Select the hourly interval from the Hours drop-down field.
Weekly	Week days	Select which days of the week to run this job.
Monthly	Monthly At	Select the day of the month to run this job.

For information on how to configure advanced intervals, see [Configuring Advanced Job Schedules](#).

4. Click the Apply button to schedule the job.

Cancelling the Producer Report Job

Cancelling a job allows the Negotiator to postpone the execution of job indefinitely without deleting it from the system. The Unschedule option will not be available when the state of the job is Not Running.

To cancel the Producer Report job:

1. On the Manage Scheduled Jobs page, click the Update link next to the Producer Report job. The Job Details page opens.
2. Click the Unschedule button. The state of the job should change to Not Running.

Viewing the Producer Report Job History

You can view the history of the Producer Report job history.

To view the history of the Producer Report job:

From the Producer Report Job page, click the History link for a job. The Producer Report Job History page opens:



Name	Producer Report	Frequency	Every day at 00:00:00	Previous Fire Time	02/03/2017 23:36:17
Role	Repository	From Date	-	Next Fire Time	-
State	Not Running	Until Date	-		
History					
Filter: All					
1 - 5 of 7 Runs					
Status	Start Time	Duration			
1	Success	02/03/2017 23:36:17	3 min, 41 sec	View Log	Download
2	Success	02/03/2017 09:25:29	0 min, 27 sec	View Log	Download
3	Success	02/03/2017 09:24:58	0 min, 5 sec	View Log	Download
4	Success	02/03/2017 09:24:49	0 min, 4 sec	View Log	Download
5	Success	02/03/2017 09:24:43	0 min, 5 sec	View Log	Download
1 - 5 of 7 Runs					

Producer Report Job History

A list of times the job ran is displayed. The following actions are available:

- Click View Log to see the log of the job.
- Click Download to download the job log.

Configuring Advanced Job Schedules

CronTrigger expressions allow users to define more advanced intervals for job scheduling. This option displays on the Job Details page when the user clicks the Advanced link.

Deposits ▾ Submissions ▾ Data Management ▾ Preservation ▾	
Home / Deposits: Producers Reports Job / Details	
* Name <input type="text" value="Producer Report"/>	
No Scheduling Hourly Daily Weekly Monthly Advanced	Please enter firing schedule using the CronTrigger: <input type="text" value="0/10 ****?*"/> CronTrigger Example 1 - an expression to create a trigger that simply fires every 5 minutes 0 0/5 *** ? CronTrigger Example 2 - an expression to create a trigger that fires every 5 minutes, at 10 seconds after the minute (i.e. 10:00:10 am, 10:05:10 am, etc.) 10 0/5 *** ? CronTrigger Example 3 - an expression to create a trigger that fires at 10:30, 11:30, 12:30, and 13:30, on every Wednesday and Friday 0 30 10-13 ? * WED,FRI CronTrigger Example 4 - an expression to create a trigger that fires every half hour between the hours of 8 am and 10 am on the 5th and 20th of every month. Note that the trigger will NOT fire at 10:00 am, just at 8:00, 8:30, 9:00 and 9:30 0 0/30 8-9 5.20 * ?
<input type="button" value="Back"/>	<input type="button" value="Refresh"/> <input type="button" value="Apply"/> <input type="button" value="Run Now"/>

Job Details Page (Interval Pane)

To configure CronTrigger expressions:

1. Select the Advanced interval on the Job Details page.
2. Enter an expression in the CronTrigger box, using the following format:

<Seconds> <Minutes> <Hours> <Day of Month> <Month> <Day of Week> <Year>



Refer to the following tables for more information on writing expressions:

CronTrigger Parameters

Parameter	Range	Special Characters Allowed
<Seconds> [*]	0 - 59	, - * /
<Minutes> [*]	0 - 59	, - * /
<Hours> [*]	0 - 23	, - * /
<Day of Month> [*]	1 - 31	, - * ? / L W
<Month> [*]	1 - 12 or JAN - DEC	, - * ? /
<Day of Week> [*]	1 - 7 or SUN - SAT	, - * ? / L #
<Year>	1970 - 2099	, - * /

*.Required parameter.

Using Special Characters

Special Character	Description
*	Indicates that all values within a parameter are used.
?	Indicates that no specific value within a parameter is used.
-	Used to specify a range of values. For example — if you enter 10-12 for <Hours> — hours 10, 11, and 12 are used.
,	Used to specify additional values. For example — if you enter 10,12 for <Hours> — hours 10 and 12 are used.
/	Used to specify increments. For example, if you specify 0/15 for <Seconds> , seconds 0, 15, 30, and 45 are used.
	Used as follows per parameter: <ul style="list-style-type: none"> ▪ <Day of Month> – Indicates the last day of the month, such as 31 for January, 30 for November, and so forth. ▪ <Day of Week> – When used alone, it indicates the last day of the week Saturday.
L	When used after another value (such <x>L), it indicates the last <x> day of the month. For example, if you enter 5L, the last Thursday of the month is used.
	When used with a hyphen, it specifies an offset from the last day of the month. For example, if you enter L-2, the second-to-last day of the month is used.



Special Character**Description**

To prevent unexpected results when using the L option, it is important not to specify lists or use ranges.

W

Used to specify the nearest weekday (Monday - Friday) to the specified day. For example, if you enter 15W and the 15th falls on a Saturday, the system will use Friday the 14th. If the 15th is on a Sunday, the system will use Monday the 16th.

If the closest weekday falls in the previous or next month, the closest weekday in the current month is used.

The L and W options can be combined to specify the last weekday of the month.

#

Used to specify the nth day of the month. For example, if you enter 5#3, the third Thursday of the month is used.

If there is no match, the job will not be executed.

CronTrigger Examples

Expression**Description**

0 0/5 * * * ?

Executes the job every five minutes.

10 0/5 * * * ?

Executes the job every five minutes, at 10 seconds after the minute (such as 10:00:10 am, 10:05:10 am, and so forth).

0 30 10-13 ? * WED,FRI

Executes the job at 10:30 am, 11:30 am, 12:30 pm, and 1:30 pm every Wednesday and Friday.

0 0/30 8-9 5,20 * ?

Executes the job every half hour between the hours of 8:00 am and 10:00 am on the 5th and 20th of the month. Note that the job will execute only at 8:00 am, 8:30 am, 9:00 am, and 9:30 am.



Submission Jobs

About Submission Jobs

Submission jobs are used to submit Producer content (per material flow) at specified intervals to the Deposit server for automated deposits.

- You can prevent the submission job from processing a folder. (This can be useful if you do not want it to be loaded prematurely.) To do so, create an empty file in the submission job folder and name it locked (or .locked).
- While processing a folder, the submission job adds a locked file.
- After a folder has been successfully processed, the submission job adds a done file. Folders with done files are not processed by the submission job. You can create a cron job to clean up these folders.
- After a folder has been unsuccessfully processed, the submission job adds an error file. Folders with error files are reprocessed by the submission job (and should not be deleted). Users can use this file to identify problematic submission folders.

Managing Submission Jobs

The Manage Scheduled Jobs page enables Negotiators to schedule submission jobs. To access this page, follow the Rosetta drop-down menu path: Deposits > Jobs > Submission Job.

The Manage Scheduled Jobs page opens to existing submission jobs:

Name	Previous Fire Time	Next Fire Time	Frequency	State	Producer	Material Flow	History	Update	Run Now	More Actions
1 Submission Job 4RE	06/08/2020 16:11:00	Every 1 hour/s	Normal	Demo Internal Producer	Rosetta METS deposit	History	Update	Run Now	More Actions	
2 Submission Job 5pF	07/08/2016 14:51:05	06/08/2020 11:19:00	Every 1 hour/s	Normal	Demo Internal Producer	Rosetta METS deposit	History	Update	Run Now	More Actions
3 Submission Job	-	-	Every Sunday at 1:00	Not Running	Demo Internal Producer	Rosetta Dublin Care deposit	History	Update	Run Now	More Actions

Manage Scheduled Jobs (Submission Jobs List)

The following information appears on this page:

- Name – the name of the submission job
- Previous Fire Time – the last time the job ran
- Next Fire Time – the next time the job is scheduled to run
- Frequency – the frequency with which the job runs
- State – the state of the job, for example, Normal, Not Running, etc.
- Producer – the Producer who created the job
- Material Flow – the material flow with which the job is associated



This page enables Negotiators to monitor the status of each submission job and perform the following tasks:

- Add a new job – For more information, see [Adding a Submission Job](#).
- View a job’s history – Click the History link to display a list of times the job ran. For more information, see [Viewing Submission Job History](#)
- Modify a job – For more information, see [Modifying a Submission Job](#).
- Execute a job – Click the Run Now link to run a job manually.
- Duplicate a job – Click Duplicate to create a copy of the job.

In addition, you can cancel a job. For more information, see [Canceling a Submission Job](#).

Viewing Submission Job History

You can view the history of submission jobs.

To view the history of submission jobs:

From the Manage Scheduled Jobs page, click the History link for a job. The Submission Job History page opens:

The screenshot shows the 'Rosetta Management' interface. At the top, there are navigation tabs: Deposits, Submissions, Data Management, and Preservation. Below this, the breadcrumb trail is 'Deposits: Submission Job / Details'. The main content area is divided into sections: 'Job Parameters' and 'History'. The 'Job Parameters' section shows 'Producer Agent User Name: admin1', 'Producer: Producer for Testing', and 'Material Flow: 69347 (not listed)'. The 'History' section has a 'Filter: All' dropdown and shows '1 - 1 of 1 Runs'. A table with the following data is displayed:

	Status	Start Time	Duration			
1	Success	13/09/2016 19:56:19	0 min, 2 sec	View Log	Download	SIPs

At the bottom of the history section, it says '1 - 1 of 1 Runs'. There are 'Back' and 'Refresh' buttons at the bottom of the page.

Submission Job History

A list of times the job ran is displayed. The following actions are available:

- Click View Log to see the log of the job. For example:

```
Tue Sep 13 19:56:20 IDT 2016 INFO Started Processing Deposit For: Test_Plan-1473785662231
Tue Sep 13 19:56:21 IDT 2016 INFO Deposit successful for Test_Plan-1473785662231 Deposit Activity ID: 157, SIP 157
Tue Sep 13 19:56:21 IDT 2016 INFO Finished Processing Deposit For: Test_Plan-1473785662231
Tue Sep 13 19:56:21 IDT 2016 INFO Submission Job finished
Tue Sep 13 19:56:21 IDT 2016 INFO Job completed Successfully
```

Submission Job History Log



- Click Download to download the job log.
- Click SIPs to display a report of SIPs generated by the job.

Adding a Submission Job

This task allows Negotiators to create a new submission job for a material flow. To add a submission job:

1. Click the Add job button on the Manage Scheduled Jobs page. The Job Details page opens.

Job Details (Submission Job)

2. Enter a name for the submission job in the Name field.
3. Select the interval at which to execute the job: No Scheduling, Hourly, Daily, Weekly, Monthly, and Advanced.
4. To configure hourly, daily, weekly, and monthly intervals:
 - a. Use the following table to configure the common interval fields:



Common Interval Fields

Section	Field	Description
Start At	Time	Select the hour and minutes from the drop-down fields to specify the time at which to run the job.
	Date	Use the calendar tool or select the month, day, and year from the drop-down fields to select the date at which to start running the job.
	Indefinitely	Select this option to run the job indefinitely.
Repeat	Until	Select the month, day, and year from the drop-down fields to specify the date at which to stop running the job. After this date, the state of the job will change from Normal to Not Running.

- b. Use the following table to configure the interval-specific fields:

Interval-Specific Fields

Type of Interval	Perform this task:	Description
Hourly	Every	Select the hourly interval from the Hours drop-down field.
Weekly	Week days	Select which days of the week to run this job.
Monthly	Monthly At	Select the day of the month to run this job.

For information on how to configure advanced intervals, see [Configuring Advanced Job Schedules](#).

- Complete the required fields in the Job Parameters pane.
Note: The list of available material flows will be populated based on the selected producer's profile.
- From the Send Email? drop-down list, you have the following options:
 - No (default)
 - Yes (if there was work)
 - On failure only
The email contains a report/log file for the job.
- Click the Apply button to add the job to the list of submission jobs.

Modifying a Submission Job

This task allows Negotiators to modify the details for an existing submission job.
To modify a submission job:

- On the Manage Scheduled Jobs page, click the Update link next to the job that you want to modify.
The Job Details page opens.
- Select the interval at which to execute the job: No Scheduling, Hourly, Daily, Weekly, Monthly, and Advanced.
- To configure hourly, daily, weekly, and monthly intervals:
 - Use the following table to configure the common interval fields:



Common Interval Fields

Section	Field	Description
Start At	Time	Select the hour and minutes from the drop-down fields to specify the time at which to run the job.
	Date	Use the calendar tool or select the month, day, and year from the drop-down fields to select the date at which to start running the job.
	Indefinitely	Select this option to run the job indefinitely.
Repeat	Until	Select the month, day, and year from the drop-down fields to specify the date at which to stop running the job. After this date, the state of the job will change from Normal to Not Running.

- b. Use the following table to configure the interval-specific fields:

Interval-Specific Fields

Type of Interval	Perform this task:	Description
Hourly	Every	Select the hourly interval from the Hours drop-down field.
Weekly	Week days	Select which days of the week to run this job.
Monthly	Monthly At	Select the day of the month to run this job.

For information on how to configure advanced intervals, see [Configuring Advanced Job Schedules](#).

4. Complete the required fields in the Job Parameters pane.
5. Click the Apply button to add the job to the list of submission jobs.

Canceling a Submission Job

Canceling a job allows the Negotiator to postpone the execution of job indefinitely without deleting it from the system. The Unschedule option will not be available when the state of the job is Not Running.

To cancel a submission job:

1. On the Manage Scheduled Jobs page, click the Edit link next to the job that you want to modify.
The Job Details page opens.
2. Click the Unschedule button.
The state of the job should change to Not Running.



Assessors, Arrangers, and Approvers

This page was not added to the PDF due to the following tag(s): article:topic-guide



Understanding Assessors, Arrangers, and Approvers

Assessors, Arrangers, and Approvers are responsible for reviewing content that Producer Agents deposit. The table below shows the responsibilities of Assessors, Arrangers, and Approvers:

Responsibilities of Assessors, Arrangers, and Approvers

Responsibility	Assessor	Arranger	Approver
Approving, returning, or declining SIPs	Yes	Yes	Yes
Approving, returning, or declining intellectual entities (IEs)	Yes	Yes	No
Rearranging IEs	No	Yes	Yes
Assigning a collection management system (CMS) ID	Yes (can assign a CMS ID to one intellectual entity)	Yes (can assign a CMS ID to multiple intellectual entities simultaneously)	No
Replacing an incompatible file with a copy that is accessible to the library system	Yes (if also has TA or Editor privileges)	Yes (if also has TA or Editor privileges)	No

For more information about SIPs and IEs, see the Rosetta Overview Guide.

Each Assessor is associated with an approval group. A Back Office Administrator defines content that should be reviewed by each approval group. Assessors, Arrangers, and Approvers can work only with the content that is defined for their approval group.

Assessors, Arrangers, and Approvers are assigned by a User Manager, who registers them and defines their privileges. Privileges can be either View, Typical, or Full. Their scope is institutional.



Working with SIPs

About Working with SIPs

Assessors, Arrangers, and Approvers can view information about deposited submission information packages (SIPs) and decide whether this content should be approved, rejected, or declined.

Metadata Submission Methods per Content Structure

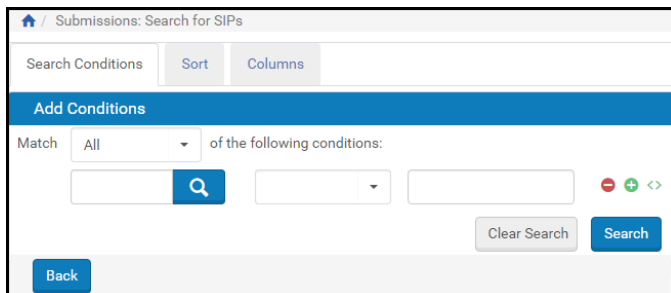
The following table describes the metadata submission methods per content structure. For more information, see [Configuring Content Structures](#).

Metadata Submission Methods per Content Structure

Content Structure	Metadata Submission Method
METS	Dublin Core record as dc.xml file in SIP root directory
Dublin Core	Dublin Core record as dc.xml file in SIP root directory
CSV	In a CSV file
BagIt	In a Bag
XSL, Set of Files	N/A (same metadata as Intellectual Entity)

Searching for SIPs

Assessors, Arrangers, and Approvers can search for SIPs. Click Submissions > Search > Search for SIPs. The following appears:



Search for SIPs

For more information on searching for SIPs, see [Advanced Search](#).



The table below describes the search types available when searching for SIPs:
Quick Search Options

Search By	Description
ID	When a user enters a numeric string into the quick search Find box and clicks the Go button, Rosetta searches for all content with that SIP ID or Deposit ID. The Advanced Search page opens with the quick search criteria transformed to advanced search criteria (SIP ID = xxxx or Depsoit ID = xxxx) and results displayed on the bottom half of the page (under the Results heading).
Text	When a user enters a text string and clicks Go, Rosetta searches for all IEs that match the fields dc:identifier, dc:title, dc:description, or dc:creator. The entered text must include a minimum of three characters and may employ an asterisk as a wildcard.

Viewing SIPs to Be Reviewed

The Rosetta system enables Assessors, Arrangers, and Approvers to view a list of SIPs that require review. Each reviewer can view only those SIPs that are assigned to their approval group by a Back Office Administrator. (For more information, see [Understanding Assessors, Arrangers, and Approvers.](#))

To view SIPs to be reviewed:

If you are working as an Arranger or Assessor, you may be able to access the SIPs page by clicking a text link in the Quick Launch section in the upper right header. (If you do this, you do not need to follow the steps below.)

1. From the Rosetta menu, select from the Submissions tab the link that corresponds to your role or task. The SIPs List for your selected role or task opens.

	SIP ID	Alert	Title	Issue #	Producer	Type	Submitted On	Assigned To		
1	1020		Selenium Title		Demo Internal Producer	OneOff	11/07/2017		Work On	Update
2	988		Selenium Title		Demo Internal Producer	OneOff	11/07/2017		Work On	Update
3	987		Selenium Title		Demo Internal Producer	OneOff	11/07/2017		Work On	Update
4	986		Selenium Title		Demo Internal Producer	OneOff	11/07/2017		Work On	Update
5	985		Selenium Title		Demo Internal Producer	OneOff	11/07/2017		Work On	Update
6	984		Selenium Title		Demo Internal Producer	OneOff	11/07/2017		Work On	Update
7	983		Selenium Title		Demo Internal Producer	OneOff	11/07/2017		Work On	Update
8	982		Selenium Title		Demo Internal Producer	OneOff	11/07/2017		Work On	Update
9	981		Selenium Title		Demo Internal Producer	OneOff	11/07/2017		Work On	Update
10	980		Selenium Title		Demo Internal Producer	OneOff	11/07/2017		Work On	Update

Assessor SIPs List

The page contains the following columns:

Assessor SIPs List Columns

Column	Description
SIP check boxes	Selecting these enables Assessors, Arrangers, and Approvers to perform an action on multiple SIPs.
SIP ID	Displays the unique ID number assigned to the SIP.



Column	Description
Alert	Displays an icon when a Technical Analyst has marked the SIP to draw the attention of an Assessor, Arranger, or Approver. A red warning icon indicates that action is required before the SIP can be processed, while a blue information icon indicates that no action is required.
Title	Displays the SIP's title.
Issue #	Links to the bibliographic citation.
Producer	Displays the SIP's Producer.
Type	Displays the SIP's type.
Submitted On	Displays the SIP's submission date.
Assigned To	Displays the staff user who is exclusively assigned to work on the SIP. If the SIP is assigned to a specific staff user, other staff users can only view the SIP but not review it.

Accessing the SIP Content List Page

The SIP Content List page enables Assessors, Arrangers, and Approvers to view SIP objects that make up the SIP and to perform various actions, including approving, rejecting, or declining SIPs, as well as merging and splitting IEs. To access the SIP Content List page:

1. From the Rosetta drop-down menu, click Submissions, then click the link corresponding to your role's SIP list (below the Approval heading).
2. From the SIP list, locate the SIP with which you want to work and, under Actions, click Work On. The SIP Content List page opens.

	Title	PID	Status	CMS ID				
1	<input type="checkbox"/> 1024px:Haifa_Israel_by_David_Shankbone	IE61918			View	Edit IE	Assign CMS ID	Export
2	<input type="checkbox"/> World_Center_in_Haifa_Israel_Copy	IE61921			View	Edit IE	Assign CMS ID	Export
3	<input type="checkbox"/> old_city_jerusalem_Copy	IE61924			View	Edit IE	Assign CMS ID	Export
4	<input type="checkbox"/> Kotel	IE61927			View	Edit IE	Assign CMS ID	Export

SIP Content List Page - List View

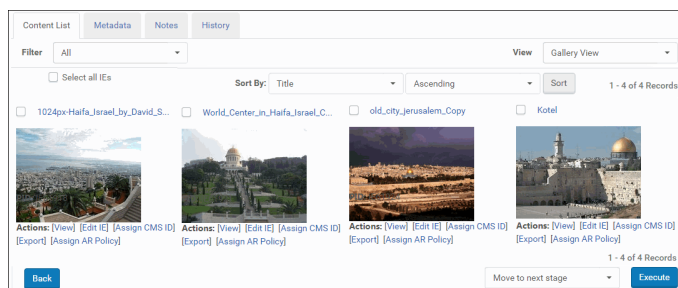
The page contains the following columns:



SIP Content List Page Columns

Column	Description
Title	Displays the name of the SIP object.
PID	Displays the permanent unique identifier of the intellectual entity(IE).
Status	Displays the status of the IE.
CMS ID	Displays the identifier of the IE in the collection management system(CMS).
Various actions	Various actions that can be performed on the item, for example, View, Export, and assigning CMSIDs and access rights.

Arrangers and Assessors can view the IEs in a list view (as shown above) or as a Gallery (or thumbnail) display (see below). Thumbnails are generated on demand. If the system is unable to generate a thumbnail for a specific object, it uses a default image set up in the administrative module of Rosetta. (See Generic Thumbnail Creation in the Rosetta Configuration Guide for instructions/details.)



Gallery View for IEs in SIP

The Gallery view provides a count of the IEs and the option for sorting on one field, ascending or descending.

Viewing SIP Information

The Rosetta system enables Assessors, Arrangers, and Approvers to view information about SIPs. Assessors, Arrangers, and Approvers can view the following items:

- [SIP History](#)
- [SIP Problem Notes](#)
- [An IE in a SIP](#)
- [IE Structure and Metadata](#)
- [Tree View](#)

SIP History

Assessors, Arrangers, and Approvers can view the history of a SIP. For example, an Assessor can see when the content was deposited by the Producer Agent and when the SIP was moved from the Deposit Server to the Staging Server.

To view SIP history:



1. Access the SIP Content List page by using a Quick Launch text link or clicking Submissions from the Home page and selecting a role/task from the Approval section. (See [Accessing the SIP Content List Page](#) for details.)
2. Click the History tab. The SIP History page opens

Event Type	Description	Module	Submitted On
1 Fixity check performed on file	Fixity check was performed successfully for file FL6980. Representation REP6979 IE IE6978 Copy ID:	STAGING	25/01/2018 07:50:23
2 Completed Validation Stack Stage	Finished Validation Stack Stage for SIP 947	STAGING	25/01/2018 07:50:23
3 Fixity check performed on file	Fixity check was performed successfully for file FL6980. Representation REP6979 IE IE6978 Copy ID:	STAGING	25/01/2018 07:50:23
4 Fixity check performed on file	Fixity check was performed successfully for file FL6980. Representation REP6979 IE IE6978 Copy ID:	STAGING	25/01/2018 07:50:23
5 SIP submitted to Staging Server	Deposit Activity 2463 was submitted to the Staging Server as SIP ID 947	DEPOSIT	25/01/2018 07:50:22
6 Generate SIP ID	SIP ID 947 was generated	STAGING	25/01/2018 07:50:22

SIP History Page

The page contains the following columns:

SIP History Page Columns

Column	Description
Event Type	Displays the SIP's event type.
Description	Displays a description of the event.
Module	Displays the module in which the event took place. For example, Deposit Server or Staging Server.
Submitted On	Displays the date on which the SIP was submitted.

3. Locate the event you want to view and click its event type. The Event Details page opens

Event Description	Fixity check was performed successfully for file FL6980. Representation REP6979 IE IE6978 Copy ID:
Event ID	257703
Event Type	27
Created on	25/01/2018
Event Severity	INFO
Event Category	-
Machine Address	-
Event Values	IE_PID=IE6978;COPY_ID=null;ALGORITHM_NAME=SHA256;DEPOSIT_ACTIVITY_ID=2463;FILE_P...
Event Context	-
User Name	SYSTEM
User Group	-
Session ID	-
Event Duration	13
Sub Module	VALIDATION_STACK
Module	STAGING

Event Details Page

The Event Details page displays several fields that contain information about the selected event.

SIP Problem Notes

Assessors, Arrangers, and Approvers can view problem-related notes of a SIP that have been entered by staff users



who previously worked with the SIP.

To view the SIP notes:

On the SIP Content List page (see [Accessing the SIP Content List Page](#)), click the Notes tab. The SIP Notes page opens.

The screenshot shows the 'Submissions: Approve SIPs / Details' page. It features a table with the following data:

SIP ID	947	Producer	Demo Internal Producer	Producer Agent	John Smith
Deposit Activity ID	2463	Material Flow Name	General digital material	Material Type	Unpublished
Title	Selenium Title	Selected Access Rights	Accessible from institution premises	Submitted On	25/01/2018 07:50:22

Below the table are tabs for 'Content List', 'Metadata', 'Notes', and 'History'. The 'Notes' tab is active, showing 'Updated on' (25/01/2018 07:50:39) and 'Updated by' (admin1). There is an 'Internal Notes' field with the text 'selenium change approval group' and an 'Add Internal Note' section with an 'Add Note' button. At the bottom, there are 'Back', 'Move to next stage', and 'Execute' buttons.

SIP Notes Page

Notes display below the tabs.

Users can add their own notes by typing information in the Add Internal Note field and clicking the Add Note button.

An IE in a SIP

Assessors, Arrangers, and Approvers can view a SIP IE in a Web browser using the Delivery option.

To view a SIP's IE:

On the SIP Content List page (see [Accessing the SIP Content List Page](#)), locate the SIP object you want to view and click View. The selected IE opens in a separate browser window.

IE Structure and Metadata

Assessors, Arrangers, and Approvers can view metadata about an IE as a unit, its representations, and its files. The metadata provides the following types of information:

- Descriptive metadata, which contains information provided by Producer Agents, such as content creator, title, category, and subject. Specific information that Producer Agents must provide is defined by Deposit Managers, Negotiators, and Administrators.
- Administrative metadata, which contains information that is automatically generated by the Rosetta system. This information includes technical (such as file size, format, location, and unique identifier), provenance (such as Producer and Producer Agent's name), and access rights metadata. Specific information that the Rosetta system generates is defined by an Administrator during the configuration of the DNX profile.

Assessors, Arrangers, and Approvers can view IE metadata using the Web Editor.

To view IE metadata:

1. On the SIP Content List page (see [Accessing the SIP Content List Page](#)), locate the IE for which you want to view the metadata and click Edit IE.
The IE opens in the Web Editor.



Intellectual Entity PID	IE1055	Created on	24/01/2018 10:49:40	Created by	admin1
Committed on	24/01/2018 10:50:17	Committed by	admin1	SIP ID	15
Version	1				

Object Summary	
PID	IE1055
SIP ID	15
Created on	24/01/2018 10:49:40
Created by	admin1
Updated on	24/01/2018 10:49:41
Updated by	admin1
Entity Type	-
Number of Repts	1
Status	ACTIVE

Web Editor

For more information on the Web Editor, see [About the Web Editor](#).

Approving a SIP

Assessors, Arrangers, and Approvers can approve a SIP when the SIP content is found appropriate for storage in the Rosetta system. After a SIP is approved, it is moved to the next stage, as defined by a Back Office Administrator. (For more information about SIP processing, see [Configuring SIP Processing in the Rosetta Configuration Guide](#).) A notification e-mail may be sent to the Producer Agent if such an action has been set up by the System Administrator (see [Adding an E-mail Confirmation in the Rosetta Configuration Guide](#)).

To approve a SIP:

1. On the SIP Content List page (see [Accessing the SIP Content List Page](#)), in the Action drop-down list, select Move to Next Stage.
2. Click Execute.

The SIP is moved to the next stage, as defined by a Back Office Administrator.

Declining or Rejecting a SIP

Assessors, Arrangers, and Approvers can decline or reject a SIP when the SIP content is found to be inappropriate for storage in the Rosetta system, or when the SIP content contains problems that the Producer Agent must repair (such as viruses or corrupted files).

When the content is rejected, the Producer Agent receives a notification of the rejection and the reason for the rejection as specified by the Assessor, Arranger, or Approver. The Producer Agent must repair the issues and resubmit the content.

When the content is declined, the Producer Agent who deposited it cannot resubmit the content.

To decline or reject a SIP:

1. On the SIP Content List page (see [Accessing the SIP Content List Page](#)), do one of the following:
 - To decline or reject specific IEs, select their check boxes and, from the drop-down list in the bottom right of the page, select Decline IEs or Reject IEs. Declining or rejecting specific IEs is not possible when the SIP includes relationships between IEs.
 - To decline or reject the entire SIP, from the drop-down list, select Decline SIP or Reject SIP.
2. Click the Execute button. The Reason page opens.



Submissions: Approve SIPs / Details

You have chosen to reject SIP(s) no. 947. Please provide a reason

Reason: Bad Resolution

Optional Note:

Note: Any derivatives that may have been generated during SIP processing will be deleted.

Cancel Save

Action Reason Form for Declining an IE

- In the Reason drop-down list, select the reason why you are declining or rejecting the content.
- In the Optional Note field, enter notes for the Producer Agent, if necessary.
- Click OK. The SIP or IEs are removed from the page.

The Rosetta system sends an e-mail notification to the Producer Agent that the content was rejected or declined.

Aborting a SIP

You can abort a SIP that has not yet been processed. To abort a SIP, click Abort in the row of the SIP you want to abort. You can abort multiple SIPs by selecting them and selecting the Abort action from the drop-down list. The SIP appears in the TA deposit list.

Results

View: Default Paging 1 - 10 of 1,514 Records

SIP ID	Deposit ID	Producer ID	Title (DC)	Date Submitted	Date Updated	Location			
1	2	10000	Selenium Title	03/02/2019	03/02/2019	Assessor	Abort	Details	Report
2	3	10000	Selenium Title	03/02/2019	03/02/2019	Assessor	Show in Workb...	Details	Report
3	4	10000	Selenium Title	03/02/2019	03/02/2019	Assessor	Show in Workb...	Details	Report

Aborting a SIP

Forwarding a SIP or an IE

Assessors, Arrangers, and Approvers can forward a SIP or specific IEs to another staff user when it is necessary to get a second opinion.

To forward a SIP or an IE to another staff user:

- On the SIP Content List page (see [Accessing the SIP Content List Page](#)), do one of the following:
 - To forward specific IEs, select their check boxes and, in the Action drop-down list, select either Move to Specific Assessor (when you want to move the SIP to a specific Assessor) or Move to Assessor (when you want to move the SIP to a group of Assessors, Arrangers, or Approvers).
 - To forward the entire SIP or multiple SIPs, in the Action drop-down list, select either Assign To to assign a SIP to a specific user within the same work area, or Move SIP(s) to Assessor /Arranger/Approver Pool when you want to move the SIP between 3A work areas. You cannot move SIPs that are assigned to another user.
- Click Execute. The SIP or IEs are forwarded to staff users, as specified.



Organizing IEs

Both Arrangers and Assessors have privileges to:

- [Rearrange the Structure Map of an IE](#)
- [Merge Single IEs](#)
- [Split an IE](#)

Rearrange the Structure Map of an IE

To make changes to the IE's structure map, do the following:

1. On the Submissions page, click the **Arrange SIPs** link.
The SIPs List page opens.
2. Click the **Work On** link of the SIP that contains the IE you want to rearrange.
The SIP Content List page opens.
3. Click the **Edit IE** link of the IE.
The Intellectual Entity page opens in the Web Editor.
4. In the left column of Web Editor, click the Representation line below the IE.
5. Click the Metadata tab.
6. Click the **Edit** link of the row whose type equals Structure Map.
The Edit Structure Map page opens.

Order	File Name	Path	Label
1	323321738vAlcfu_fs.jpg	323321738vAlcfu_fs.jpg	323321738vAlcfu_fs
2	43956460.jpg	43956460.jpg	43956460

Edit Structure Map Page

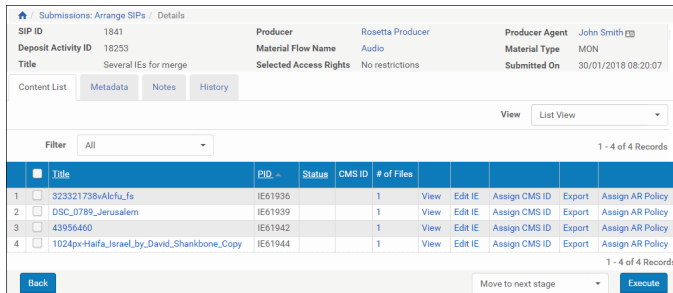
7. Do the following, as required:
 - To re-order the files that comprise the IE, use the arrow buttons in the Order column.
 - To assign a label to the root of the structure, type it in the Root - Label field.
 - To assign labels to the files, type them in the Label column.
8. Click the Save button.
The system commits the rearrangement of the structure map to memory.



Merge Single IEs

To merge a number of single IEs into one IE

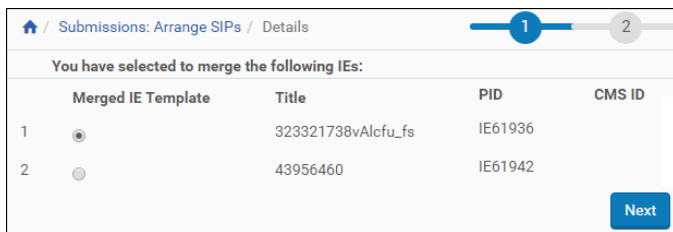
1. Click the Submissions > Arrange SIPs link.
The SIPs List page opens.
2. Click the **Work On** link of the SIP you want to change.
The SIP Content List page opens



Title	PID	Status	CMS ID	# of Files	View	Edit IE	Assign CMS ID	Export	Assign AR Policy
<input type="checkbox"/> 323321738vAlcfu_fs	IE61936			1	View	Edit IE	Assign CMS ID	Export	Assign AR Policy
<input type="checkbox"/> D5C_0789_Jerusalem	IE61939			1	View	Edit IE	Assign CMS ID	Export	Assign AR Policy
<input type="checkbox"/> 43956460	IE61942			1	View	Edit IE	Assign CMS ID	Export	Assign AR Policy
<input type="checkbox"/> 1024px-Haifa-Jarrel_by-David-Shankbone_Copy	IE61944			1	View	Edit IE	Assign CMS ID	Export	Assign AR Policy

SIP Content List Page

3. Select the check boxes of the IEs that you want to merge.
Only IEs that contain one file can be merged. The number of files in each IE is indicated in the # of Files column of the SIP Content list.
4. In the drop-down list in the lower right corner of the page, select Merge Selected IEs and click the **Execute** button.
A warning page explains that the existing logical structure maps will be lost as a result of the merge, and any access copies of the IEs will be lost.
5. Click **Cancel** to stop the merging process, click **Merge** to proceed.
The following page opens.



Merged IE Template	Title	PID	CMS ID
<input checked="" type="radio"/>	323321738vAlcfu_fs	IE61936	
<input type="radio"/>	43956460	IE61942	

Merge IEs - Select the Main IE

6. Choose a main IE of the group (to which other IEs will be added and which will determine the template of the merged IE). Select the radio button of this IE and click **Next**.
The following page opens.



Home / Submissions: Arrange SIPs / Details

1 2

Enter Information for the new IE:

* Title

< Cancel Finish

Merge IEs - Merged IE's Title

7. Enter a title for the merged IE and click **Finish**. The Edit Structure Map page opens.

Deposits Submissions Data Management Preservation

Home / Submissions: Arrange SIPs / Details

MID	REP61937-1	Metadata Type	mets_section:structMap	Description
Created by	admin1	Creation Date	1/30/18	
Updated by		Update Date	2/5/18	

Structmap Type

Structmap - Label Root - Label

Order	File Name	Path	Label
⋮	323321738vAlcfu_fs.jpg	323321738vAlcfu_fs.jpg	<input type="text" value="323321738vAlcfu_fs"/>
⋮	43956460.jpg	43956460.jpg	<input type="text" value="43956460"/>

Back Save

Edit Structure Map Page

8. If required, edit the structure map of the merged IE as described in [Rearrange the Structure Map of an IE](#).
9. Click **Save**.
The SIP Content List page opens again. The new IE appears in the list instead of the IEs that were merged. Note that its PID is that of the main IE selected in Step 6.

Split an IE

To split complex IEs into single IEs:

1. On the Submissions page, click the **Arrange SIPs** link.
The SIPs List page opens.
2. Click the **Work On** link of the SIP you want to rearrange.
The SIP Content List page opens.
SIP Content List Page
If more than one file exists in the IE, the option to **Split** appears. Click this link. A confirmation form opens.
3. Click **Cancel** to stop the splitting process, click **Split** to proceed.
4. The SIP Content List page opens again. New one-file IEs appear in the list



Submissions: Arrange SIPs / Details

SIP ID 1841 Producer Rosetta Producer Producer Agent John Smith

Deposit Activity ID 18253 Material Flow Name Audio Material Type MON

Title Several IEs for merge Selected Access Rights No restrictions Submitted On 30/01/2018 08:20:07

Content List Metadata Notes History

View List View

Filter All 1 - 3 of 3 Records

<input type="checkbox"/>	Title	IID	Status	CMS ID	# of Files						
<input type="checkbox"/>	323321738vAlcfu_fs	IE61936			2	View	Edit IE	Assign CMS ID	Export	Assign AR Policy	Split
<input type="checkbox"/>	DSC_0789_Jerusalem	IE61939			1	View	Edit IE	Assign CMS ID	Export	Assign AR Policy	
<input type="checkbox"/>	1024px-Haifa_Israel_by_David_Shankbone_Copy	IE61944			1	View	Edit IE	Assign CMS ID	Export	Assign AR Policy	

1 - 3 of 3 Records

Back Move to next stage Execute

SIP Content List

Tree View

You can view the IEs in a SIP in a hierarchical tree view if you have Arranger or Assessor privileges. To view the IEs in a tree view, select Tree View from the View drop-down list. The tree view opens in the left pane while the list view opens in the right pane. The figure below shows these views.

Submissions: Assess SIPs / Details

SIP ID 1840 Producer Rosetta Producer Producer Agent John Smith

Deposit Activity ID 18252 Material Flow Name Audio Material Type MON

Title Several IEs Selected Access Rights No restrictions Submitted On 30/01/2018 07:56:05

Content List Metadata Notes History

View Tree View

Filter All View Sub-Folders 1 - 4 of 4 Records

Display all IEs

<input type="checkbox"/>	Title	IID	Status	CMS ID						
<input type="checkbox"/>	1024px-Haifa_Israel_by_David_Shankbone	IE61918			View	Edit IE	Assign CMS ID	Export	Assign AR Policy	
<input type="checkbox"/>	World_Center_in_Haifa_Israel_Copy	IE61921			View	Edit IE	Assign CMS ID	Export	Assign AR Policy	
<input type="checkbox"/>	old_city_jerusalem_Copy	IE61924			View	Edit IE	Assign CMS ID	Export	Assign AR Policy	
<input type="checkbox"/>	Kotel	IE61927			View	Edit IE	Assign CMS ID	Export	Assign AR Policy	

1 - 4 of 4 Records

Back Move to next stage Execute

Unstructured Tree View

The tree view option will be available only when the system is able to reconstruct the original tree structure. There are three ways in which information about the original path to the files can be passed to the server when a user deposits material.

- From the Deposit API, given a directory structure and multiple IE.xml files.
- From the Web interface, loading multiple files through the applet.
- From a submitter application (for example, Indigo), if the original path is provided as part of the METS file.

Selecting a node of the tree applies a filter to the IE list. Only IEs that have files in the selected node are displayed. Rosetta displays only Master Copy files in the tree. If any of the IEs contain Access Copies, Rosetta does not display the files in the tree.

Selecting a file from the tree displays the IE containing the file.

Clicking the Display all IEs button when the list is filtered restores the whole list of IEs for the SIP.

Selecting the View sub-folders check box displays all IEs in the selected folder plus all IEs in the inclusive sub-folders.

De-selecting the box removes the IEs in the sub-folders from view.

The list of IEs can be filtered using the regular filter drop-down list. The filter through the tree nodes takes precedence.

Choosing a node in the tree resets any existing filter and creates a new list of IEs for the selected node.

If you select a filter from the drop-down list, it is applied to the already filtered list of IEs that are displayed as a result of the selection in the tree node. Changing the filter in the drop-down list does not affect the selection in the tree node.

Note that filtering can lead to empty results due to the combination of the two filters (the tree and the drop-down list).

These empty results may not always be intuitive.

If the tree cannot be reconstructed the tree view contains a non-hierarchical list of the IEs.



Integration with External Collection

Assigning a CMS ID to an Intellectual Entity

The Rosetta system supports integration with external collection management systems (CMS), such as Voyager, in order to establish a relationship between IEs stored in the Rosetta system and their metadata stored in a CMS. Assessors and Arrangers can link metadata from an external CMS to IEs by assigning a collection management system identifier (CMS ID) to an IE. In addition, Arrangers can assign a CMS ID to multiple IEs simultaneously. To assign a CMS ID to an IE:

1. From the Rosetta Submissions drop-down menu, under the Approval heading, click Assess SIPs or Arrange SIPs, depending on your role.
The SIPs List page for your role opens.
2. Locate the SIP that contains the IE to which you want to assign a CMS ID and click Work On.
The SIP Content List page opens.

Submissions: Assess SIPs / Details

SIP ID 1030 Producer Demo Internal Producer Producer Agent John Smith

Deposit Activity ID 2585 Material Flow Name One time publications Material Type OneOff

Title Selenium Title Selected Access Rights No restrictions Submitted On 25/01/2018 10:32:15

Content List Metadata Notes History

View List View

Filter All 1 - 1 of 1 Records

Title	PID	Status	CMS ID				
door	IE7271			View	Edit IE	Assign CMS ID	Export Assign AR Policy

1 - 1 of 1 Records

Back Move to next stage Execute

SIP Content List Page

3. Locate the IE to which you want to assign a CMS ID and click the Assign CMS ID text link.
The search page for assigning CMS IDs to IEs opens:

Submissions: Assess SIPs / Details

Search Database: qa722mkdb Refresh Indexes

Find:

Search Category: title

GO Cancel



Assign CMS ID Search Page

- Optional: Click the Refresh Indexes button to update the database with the latest IEs.
- Search for an ID using the Search Database drop-down list, the Find text box, and the Search Category (search fields) drop-down list. Click GO.
The results show in a table below the search fields

Search Database: RefreshIndexes

Find:

Search Category:

GO

1 - 10 of 16 Records > >>

	ID	Title	Creator	Created on
1	<input type="radio"/> 36487	A family apart /	Nixon, Joan Lowery.	1987.
2	<input type="radio"/> 13178	Freight train /	Crews, Donald.	c1978.
3	<input type="radio"/> 28444	How to raise and train a skunk.	Hume, Charles, 1922-	[1967]
4	<input type="radio"/> 34602	How to select, train, and use volunteers in the school /	Harris, Rosa Alexander.	c1985.
5	<input type="radio"/> 46932	I travel by train /	Brown, Rollo Walter, 1880-1956.	1939.
6	<input type="radio"/> 37236	In the face of danger /	Nixon, Joan Lowery.	1988.
7	<input type="radio"/> 17903	Last train from Berlin /	Smith, Howard K. (Howard Kingsbu...	1942.
8	<input type="radio"/> 53149	Official document book : New York State Freedom Train.	New York State Library. Manuscript...	c1950.

1 - 10 of 16 Records > >>

Cancel

Assign CMS ID Results Page

- Locate the ID you want to assign to the IE and click the Link button.
The CMS ID is assigned to the IE.

The Rosetta system can now synchronize the metadata stored in an external CMS with the IE.

Unassigning a CMS ID to an Intellectual Entity

There are two methods to unassign a CMS record - manually and automatically:
To unassign a CMS record manually:

- Search for the IE whose CMS record you want to remove.
- View the metadata list for the IE. For example:



Data Management: Search for Objects / Details

Intellectual Entity PID IE1003 Created on 24/01/2018 10:29:07 Created by admin1
 Committed on 24/01/2018 10:29:17 Committed by admin1 SIP ID 2
 Version 1

Locked By: Me.

IE (IE1003)
 Preservation Master Revision 1 (REP1004)
 File (FL1005,172Kb)

Object Summary Metadata Services Collections Versions

Add Metadata Assign AR Assign AR Exceptions Assign RP

Name	Type	Mid		
DNX	DNX	DNX_IE1003	Edit	
Descriptive	DC	1001	Edit	
Policy	Access Rights	4	View	
CMS	DC	4641	View	Remove

Back Actions: IE Export GO

Metadata List - CMS ID

3. Click Remove for CMS.
The CMS record is removed.

To unassign a CMS record automatically:

1. From the list of tasks (Data Management > Manage Sets and Processes > Processes > Add Process), select Unassign CMS.
2. Click Next. The following appears

Data Management: Processes / Details

1 2 3 4 5

General Info

* Process Name

Priority

Unassign CMS - Unassign CMS record from an IE

Move CMS to IE DC

Email Notification

Send email?

Back Cancel Next

Unassign CMS Task

3. Fill in the fields. To copy CMS metadata to the IE's descriptive metadata, select the Move CMS to IE DC checkbox.
4. Click Next.
5. Complete the steps for configuring the job.

CMS records that are no longer assigned to any IE are removed by the Metadata Orphan Handler job as described in the System, Background, and Operational Jobs section of the Rosetta System Administration Guide.



Technical Analysts

This page was not added to the PDF due to the following tag(s): article:topic-guide



Understanding Technical Analysts

Technical Analysts (TAs) handle problems that may occur when the Rosetta system processes Producer Agents' content.

These problems can occur with deposit activities, submission information packages (SIPs), representations, access copies, and individual files in SIPs. (For more information, see [Understanding Technical Issues](#).)

When the Rosetta system identifies a technical problem, it sends a notification to the appropriate TA by e-mail. The TA uses the Rosetta system tools to resolve the issue.

The actions that TAs can perform depend on the processing stage in which the error occurred.

Technical Analysts are assigned by a User Manager, who registers them and defines their privileges. Two types of TAs exist in Rosetta:

- A SIP-processing TA (SIP TA), who works on the issues that occur during SIP loading
- A Repository TA, who works on errors impacting files in the permanent repository

Each type of TA is one role, with one set of privileges. Their privileges are always Full, and their scope is institutional.



Understanding Technical Issues

Technical issues that are dealt with by SIP or Repository TAs comprise the following :
For SIP TAs , problems occur with deposit activities and submission information packages (SIPs):

- A deposit activity or a set of files uploaded by a Producer Agent to the Deposit Server.
- A SIP automatically generated by the Rosetta system when it moves deposit activities from the Deposit Server to the Staging Server.

For more information on the Deposit Server and Staging Server, see the Rosetta Overview Guide.
For Repository TAs, issues arise when running validation stacks on files in the permanent repository.
The following table shows content processing stages in which errors may occur and explains which objects can contain errors.

Content Processing Errors

Stage	Errors May Occur When...	Errors May Occur With...
Deposit	Producer Agents' content is uploaded to the Deposit Server	Entire deposit activities
Loading	Producer Agents' content is moved from the Deposit Server to the Staging Server	Entire SIPs
Validation	Rosetta runs a validation check on files	Individual files
Enrichment	Rosetta enriches the content before moving it to the Permanent Repository	Individual files
Move to Permanent	Rosetta moves the content from the Staging Server to the Permanent Repository	Individual files



Viewing Problematic SIP Content

About Viewing Problematic Content

The Rosetta system displays problematic content in tabs according to the stage in which the problem occurred. The following tabs are available:

- Deposit (For more information, see [Deposit.](#))
- Loading (For more information, see [Loading.](#))
- Validation (For more information, see [Validation.](#))
- Bytestream (For more information, see [Bytestream.](#))
- Enrichment (For more information, see [Enrichment.](#))
- Move to the Permanent Repository (For more information, see [To Permanent.](#))
- System error (For more information, see [System Error.](#))

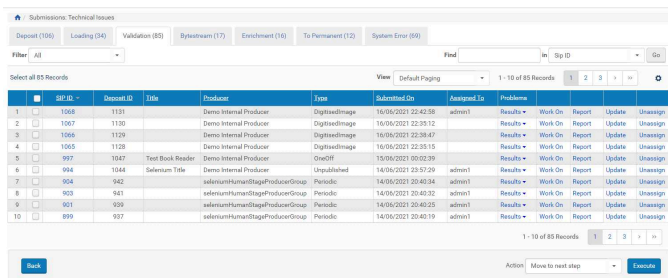
Technical Analysts work with problematic deposit activities, SIPs, and individual files using the Manage Issues in SIP Processing / SIPs List page.

Accessing the Technical Issues Page

The Technical Issues page enables Technical Analysts to work with problematic content.

To access the Technical Issues page:

From the Submissions page of the Management module, click Technical Issues below the Technical Analysis heading. The SIPs list opens.



Issue ID	Title	Problem	Date	Submitted On	Reported To	Actions
1065	1131	Demo Internal Producer	DigitizedImage	16/06/2021 22:42:58	admin1	Results • Work On • Report • Update • Unassign
1067	1130	Demo Internal Producer	DigitizedImage	16/06/2021 22:39:12	admin1	Results • Work On • Report • Update • Unassign
1066	1129	Demo Internal Producer	DigitizedImage	16/06/2021 22:38:47	admin1	Results • Work On • Report • Update • Unassign
1065	1128	Demo Internal Producer	DigitizedImage	16/06/2021 22:35:15	admin1	Results • Work On • Report • Update • Unassign
997	1047	Test Book Reader	OrcidId	15/06/2021 00:02:39	admin1	Results • Work On • Report • Update • Unassign
994	1044	Selenium Title	Unpublished	14/06/2021 23:57:29	admin1	Results • Work On • Report • Update • Unassign
904	942	seleiumHumanStageProducerGroup	Periodic	14/06/2021 20:46:34	admin1	Results • Work On • Report • Update • Unassign
903	941	seleiumHumanStageProducerGroup	Periodic	14/06/2021 20:46:32	admin1	Results • Work On • Report • Update • Unassign
901	939	seleiumHumanStageProducerGroup	Periodic	14/06/2021 20:46:25	admin1	Results • Work On • Report • Update • Unassign
899	937	seleiumHumanStageProducerGroup	Periodic	14/06/2021 20:46:19	admin1	Results • Work On • Report • Update • Unassign

Technical Issues in SIP Processing Page

The page consists of the following segments:

- The tabs along the top of the page show the type of issue and the number of items that exist for that type of problem.



- The table below the tabs displays the problematic objects that are stored in each tab. The columns vary from tab to tab.

You can configure columns to appear or be hidden, resize the columns, reorder the columns by dragging and dropping, and set the number of results that appear on a page. These settings are saved for the next time you log on to Rosetta. For more information, see [User Preferences](#) in the Rosetta Overview Guide.

The following table describes the columns of the tabs. (For descriptions of the Bytestream and System Error columns, see the relevant sections below.)

Tab Columns

Column	Description
Check boxes	Selecting these enables Technical Analysts to perform an action on multiple activities simultaneously. Toggle selecting all and deselecting all by clicking the check box in the header row.
Select All Records	Select all of the records on all of the pages
SIP ID	The unique ID number assigned to the problem. Click the SIP ID to view the Deposit Activity Problem View page.
Deposit ID	The ID of the deposit activity that contains the problematic file. Assigned to the deposit before the SIP ID has been implemented.
Title	The deposit activity title.
Producer	The Producer that provided content.
Type	The deposit activity type.
Assigned To	The name of the Technical Analyst who is exclusively assigned to work on the activity. If the activity is assigned to a specific Technical Analyst, other Technical Analysts can only view the activity but not review it.
Submitted On	The deposit activity submission date.
Actions	Provides links to actions that can be performed on the SIP, such as Work On and Update, which take the user to a detailed page for the SIP and View Errors, which displays the error details. Additional actions can be selected from the drop-down list below the table.

SIP Issues - Tabs and Details

The following sections describe the tabs and columns on the SIPs list as well as the actions that Technical Analysts can perform in each tab:

- [Deposit](#)
- [Loading](#)
- [Validation](#)



- [Bytestream](#)
- [Enrichment](#)
- [To Permanent](#)
- [System Error](#)

Deposit

The Deposit tab contains problematic deposit activities that failed when the Rosetta system was uploading them to the Deposit Server. (For more information, see [Understanding Technical Issues](#).)

In the Deposit tab, Technical Analysts can perform the following actions:

- [Moving a SIP to the Next Step](#)
- [Rejecting and Declining Problematic Content](#)
- [Resubmitting or Reloading Problematic Content](#)
- [Viewing a Problematic SIP or File](#)

Loading

The Loading tab contains problematic SIPs that failed when being moved from the Deposit Server to the Staging Server. (For more information, see [Understanding Technical Issues](#).)

In the Loading tab, Technical Analysts can perform the following actions on problematic SIPs:

- [Rejecting and Declining Problematic Content](#)
- [Resubmitting or Reloading Problematic Content](#)
- [Replacing a Problematic SIP or File](#)
- [Viewing a Problematic SIP or File](#)
- [Handling a Problematic SIP or File](#)

Validation

The Validation tab contains problematic files that failed during the validation check. (For more information, see [Understanding Technical Issues](#).)

On the Validation tab, Technical Analysts can perform the following actions on problematic files:

- [Replacing a Problematic SIP or File](#)
- [Viewing a Problematic SIP or File](#)
- [Handling a Problematic SIP or File](#)
- [Rechecking a File](#)
- [Rerunning Validation](#)

Bytestream

The Bytestream tab displays SIPs with bytestreams (containers) that failed during the bitstream extraction stage due to



one of the following:

- Error encountered while trying to extract bitstreams
- Error encountered when running validation stack on bitstream

For more information on bytestreams and bitstream extractions, see Bitstream Extraction Rules in the Rosetta Configuration Guide.

For each entry, the following actions are available:

SIPs List - Bytestream tab

Column	Description
View Errors	Link to the Bitstream Extraction Error Details page
Skip	Skip the bitstream extraction for the selected bytestream (container). bytestream will be processed as a regular file with no bitstream information
Rerun	Rerun Bitstream Extraction task for the selected bytestream (container). Rerun will skip VS at the bytestream level and will rerun VS for each of the extracted bitstreams
Reject	Reject the bytestream (container)
Download	Download the bytestream (container) to the TA's PC

To view error details for the SIP, click the SIP's ID number or click the View Errors text link of the row containing the SIP you want to view. The following page opens.

The screenshot shows the Rosetta interface for a SIP. At the top, there are navigation tabs: Deposits, Submissions, Data Management, and Preservation. Below this is a breadcrumb trail: Submissions: Technical Issues / Details. The main content area displays SIP metadata:

SIP ID	551	Producer	-	Producer Agent	John Smith
Deposit Activity ID	551	Material Flow Name	One time publications	Material Type	OneOff
Title	Selenium Title	Selected Access Rights	-	Submitted On	02/03/2017 11:06:54
Issue #	-	Assign To	-		

Below the metadata is a filter dropdown set to "Problems Only". A table of events is displayed, showing two events:

Event Type	Description	Module	Submitted On
1 Format identification performed on file	The Validation Stack failed format identification and validation	STAGING	02/03/2017 11:07:08
2 BitStream file identification zero results	File identification return zero results bitStream:BS251290	STAGING	02/03/2017 11:07:08 Download

At the bottom of the events table is a "Back" button.

View Bytestream Errors

To view further details, click the Event Type text for the failure event you want to see. To view the bytestream content, click the Download text of the row you want to view.

Details for the event type you select look like the following:



Submissions: Technical Issues / Details	
Event Description	The Validation Stack failed format identification and validation for File BS251290
Event ID	251316
Event Type	25
Created on	02/03/2017
Event Severity	ERROR
Event Category	-
Machine Address	-
Event Values	FORMAT_ID=;FILE_EXTENSION=conf;DEPOSIT_ACTIVITY_ID=551;PID=BS251290;
Event Context	-
User Name	SYSTEM
User Group	-
Session ID	-
Event Duration	0
Sub Module	VALIDATION_STACK
Module	STAGING

[Back](#)

Details of a Bytestream Event

For more information on bytestreams, bitstreams, and SIPs, see [Bitstream Extraction Rules](#) in the [Rosetta Configuration Guide](#).

Enrichment

The Enrichment tab contains problematic files that failed when the Rosetta system was enriching the content. (For more information, see [Understanding Technical Issues](#) in the [Rosetta Configuration Guide](#).)

In the Enrichment tab, Technical Analysts can perform the following actions on problematic files:

- [Handling a Problematic SIP or File](#)
- [Rerunning Enrichment](#)

To Permanent

The To Permanent tab contains problematic files that failed when the Rosetta system was moving them from the Staging Server to the Permanent Repository. (For more information, see [Understanding Technical Issues](#).)

In the To Permanent tab, Technical Analysts can perform the following action on problematic files:

- [Handling a Problematic SIP or File](#)

System Error

When a SIP fails, the system rolls back the complete stage and attempts to rerun the SIP processing. The system will attempt to rerun the SIP processing up to five times.

The System Error tab contains SIPs that fail to complete the processing after such repeated attempts. Typically, these SIPs have failed processing due to environmental issues (e.g. network, storage, database). The expectation is that such situations are temporary and readily addressed, and re-running these SIPs once the issues have been resolved will allow them to be properly processed. In the event this is not the case, contact Ex Libris Support.



Submissions: Technical Issues

Deposit (0) | Loading (2) | Validation (1) | Bytestream (0) | Enrichment (0) | To Permanent (0) | System Error (5)

1 - 5 of 5 Records

	<input type="checkbox"/>	SIP ID	Exception Date	Source Queue	
1	<input type="checkbox"/>	6	22/10/2018 08:11:47	PERMANENT_WORK_QUEUE	View Log
2	<input type="checkbox"/>	13	22/10/2018 08:13:34	PERMANENT_WORK_QUEUE	View Log
3	<input type="checkbox"/>	15	22/10/2018 08:40:30	SIP_PROCESSING_QUEUE	View Log
4	<input type="checkbox"/>	18	22/10/2018 08:39:23	SIP_PROCESSING_QUEUE	View Log
5	<input type="checkbox"/>	20	22/10/2018 08:51:44	SIP_PROCESSING_QUEUE	View Log

1 - 5 of 5 Records

[Back](#) | Action: Rerun | [Execute](#)

SIPs List - System Error Tab

The System Error tab contains the following columns:

SIPs List - System Error Tab Columns

Column	Description
--------	-------------

Check boxes	Selecting these enables you to perform an action on multiple SIPs simultaneously (using the Action drop-down menu below). Toggle selecting all and deselecting all by clicking the check box in the header row.
-------------	---

SIP ID	The unique ID number assigned to the problem.
--------	---

Exception Date	The date the exception occurred.
----------------	----------------------------------

Source Queue	The last station of the SIP.
--------------	------------------------------

View Log	Click to view the system log to help you identify the error.
----------	--

In the System Error tab, Technical Analysts can perform the following actions on files:

- Rerun
- Rerun All
- Decline SIP



Resolving SIP Technical Issues

About Resolving Issues

The Rosetta system enables Technical Analysts to resolve technical issues that occur with deposit activities, SIPs, and files.

Moving a SIP to the Next Step

After handling the technical issues of a SIP, the TA should move the SIP to its next step as defined by an Administrator. (For more information on content processing, see [Configuring SIP Processing in the Rosetta Configuration Guide](#).) If the SIP TA has overwritten the automatic output of the validation stack, the SIP's next stage is to be approved by the Assessor before it continues to the Permanent repository. If the TA has solved the issue without changing the IE's metadata, the SIP will continue to its next step based on the SIP processing configuration.

To move a SIP to the next step:

1. On the SIPs List - Loading page (see [Accessing the Technical Issues Page](#)), select the SIPs you want to move to the next stage. Select the check box at the top of the column to select all of the SIPs on the page. Click Select all Records to select all of the SIPs on all of the pages.
2. In the Action drop-down list, select Move to Next Step.
3. Click Execute.

The SIP is moved to the next step.

If the next stage includes approval of the SIP, an e-mail may be generated by the system and sent to the Producer Agent who initially submitted the material. See [Adding an E-mail Confirmation in the Rosetta Configuration Guide](#).

Rejecting and Declining Problematic Content

Technical Analysts can return or decline deposit activities or SIPs when the content contains technical problems. Rejected content can be revised and resubmitted; declined content cannot be resubmitted.

To reject or decline problematic content:

1. On the SIPs List page (Submissions > Technical Analysis > Technical Issues), click the folder containing the deposit activities or SIPs that you want to reject or decline.
2. Select the check boxes of the SIPs that you want to reject or decline. Select the check box at the top of the column to select all of the SIPs on the page. Click Select all Records to select all of the SIPs on all of the pages.

Multiple selections must share the same reason for rejection or decline. If one SIP is rejected for failing a virus check and another for containing an invalid file format, these must be processed separately.

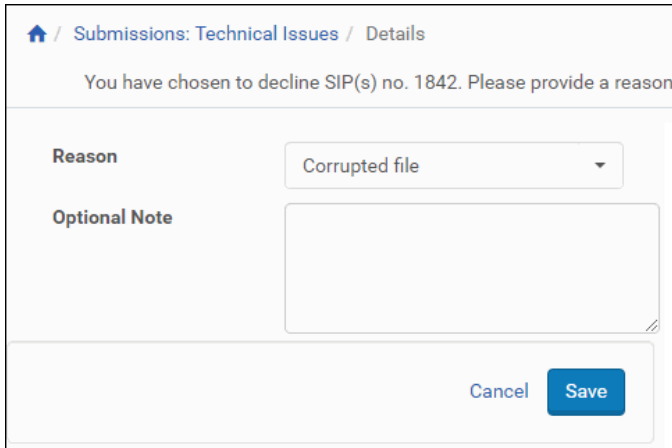


3. In the Action drop-down list, select one of the following:

- Reject SIP – to reject the file or SIP
- Decline SIP – to decline the file or SIP

Producer agents do not receive emails when all SIPs are declined.

4. Click Execute. The Action Reason page opens for the selected files:



Action Reason Page

5. In the Reason drop-down list, select the reason for decline or rejection.

6. In the Note field, enter a note (optional).

7. Click the Save button.

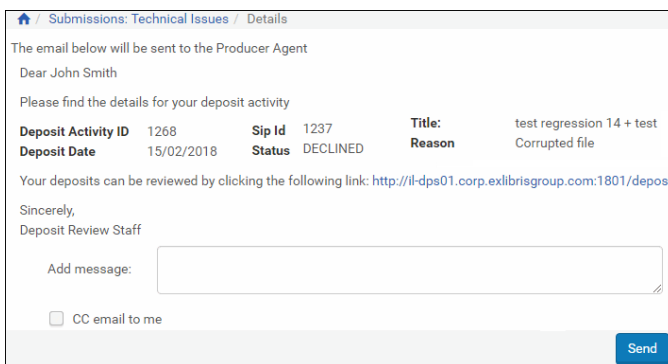
The file status changes to Rejected or Declined.

8. Do one of the following:

- If there are other files in the SIP that need to be handled, resolve their issues before continuing.
- If there are no more files in the SIP, click Move to next stage, then Execute.

The objects are removed from the folder. A new e-mail template opens for sending information to the Producer Agent.

The information displayed on the e-mail template is configurable by a Rosetta Administrator. The following figure shows an e-mail response with minimal information. To add or customize fields, see Customizing Display Fields in the Rosetta Configuration Guide.



Decline/Reject E-mail Template



9. In the Add message text box, enter additional information about the problem and how it can be resolved.
10. To have a copy of the e-mail sent to your inbox, click the CC e-mail to me check box.
11. Click the Send button.

The Producer Agent who submitted the deposit activity receives a notification by e-mail that the content was rejected or declined. If you requested a CC, you will receive a copy of the same e-mail.

Resubmitting or Reloading Problematic Content

Technical Analysts can request that the Rosetta system resubmit the deposit activity to the Deposit Server or reload a SIP to the Staging Server. The system automatically identifies the part of the deposit activity or SIP that failed during the initial upload process and reloads only this part.

To resubmit or reload problematic content:

1. On the SIPs List page (Submissions > Technical Analysis > Technical Issues), select the deposit activities or SIPs that you want to resubmit or reload.
2. In the Action drop-down list, select Resubmit or Reload.
3. Click Execute.

The Rosetta system resubmits the failed part of the deposit process.

Replacing a Problematic SIP or File

After Technical Analysts repair a problematic SIP or file on a local computer, they can replace the SIP or file with the repaired one.

The original ID, name, and path will reflect the original deposited file details. (The TA replacement will not be reflected in the DNX.) Return should be preferred if a DNX update is required.

To replace a problematic SIP or file:

1. On the SIPs List page (Submissions > Technical Issues), do one of the following:
 - To replace a SIP in the Loading folder, click the SIP ID number.
 - To replace a file in the Validation folder, locate the SIP, click Work On, and then, on the SIP Content List page, click the Replace text in the row that corresponds to the file.
2. On Step 1 of the Replace File wizard, update the File Label and enter a File Note as needed. Click the Next button to proceed to the next step, the Replace Local File page.
3. If you are uploading from a local file, remain on the Insert From Local PC tab. If you are uploading from a file on the server, click the Choose From Server tab to switch to the Replace Server File page.
4. Browse to or select the file you want and click the Upload button.
The system uploads your replacement file and produces a confirmation page, Replaced File, with the details of the replacement. Assessors, Arrangers, and Approvers will see an alert if a file was replaced.

After the SIP is replaced, it must be reloaded on the Rosetta system.

Viewing a Problematic SIP or File

Technical Analysts can view a problematic SIP or file in a Web browser using the View option.

To view a SIP:



On the SIPs List page (Submissions > Technical Issues), do one of the following:

- To view a deposit activity in the Deposit folder, select the deposit Activity ID.
- To view a SIP from the Loading or Validation folder, click the SIP ID or click the Work On text link in the SIP's row.
- To view a file in the Validation folder, locate the SIP, click Work On, and then, on the SIP Content List page, click More, then View in the row corresponding to the file.

The deposit activity, SIP, or file opens.

Validation Stack Error Codes

The following errors can occur when running a validation stack on a SIP or file.

Task	Error Description	Error ID
Format Identification	No matching format identification	vs_Error.3
	Multiple matching format identification signature	vs_Error.5
	Tentatively matching format identification	vs_Error.9
	File Extension Mismatch	vs_Error.17
	Error/s returned during format validation	vs_Error.3145728
Format Validation	Failed to get the format validator tool for this format	vs_Error.5242880
	The format validation plugin encountered unexpected error	vs_Error.9437184
File Fixity	Fixity Check Failed	vs_Error.32
	Conflict between original checksum and populate checksum	vs_Error.96
	Default error during MD extraction, used to catch all unexpected errors	vs_Error.256
MD Extraction	MD Extraction Plug-in error - Can't process extraction tool output	vs_Error.768
	Mapping error - Extractor property type is not compatible with its value	vs_Error.2304
	Failed to get the MD Extraction plug-in (can't be found in the plug-in directory)	vs_Error.8448



Task	Error Description	Error ID
	MD Extraction plug-in - encounter unexpected error - No properties extracted	vs_Error.524544
	MD Extraction plug-in timeout - Extractor timed out while attempting to extract metadata.	vs_Error.4352
Virus Check	Virus check - threat found	vs_Error.16384
	Virus check - threat suspected	vs_Error.32768
Risk Analysis	Exception occurred during risk analysis	vs_Error.262144

Handling a Problematic SIP or File

Technical Analysts can handle problematic SIPs or files by opening the Technical Issues List page (Submissions > Technical Analysis > Technical Issues) and then clicking Work On for a SIP. The Technical Issues - Details page appears.

File Name	PID	Status	Problems	Download	Replace	Recheck	Edit	View	Format
remote_cg_ins02 - Copy (17).conf	FL1818		1 Tasks failed						
BISMAN_ABST2 - Copy (14).rtf	FL1819		1 Tasks failed						
BISMAN_ABST2 - Copy (16).rtf	FL1820		1 Tasks failed						
remote_cg_ins02 - Copy (9) - Copy.conf	FL1821		1 Tasks failed						
BISMAN_ABST2 - Copy.rtf	FL1822		1 Tasks failed						
remote_cg_ins02 - Copy (16).conf	FL1823		1 Tasks failed						
remote_cg_ins02 - Copy (14) - Copy.conf	FL1824		1 Tasks failed						
remote_cg_ins02 - Copy (14).conf	FL1825		1 Tasks failed						
remote_cg_ins02 - Copy (15) - Copy.conf	FL1826		1 Tasks failed						
remote_cg_ins02 - Copy (4).conf	FL1827		1 Tasks failed						

Technical Issues - Details

If the same technical issue affects multiple files in a given SIP, you can handle the issue for of the files with one action (in bulk).

To handle issues in bulk:

1. From the View drop-down list select All to see all of the files of the SIP.
2. Click the + icon next to the Problems header to open the tasks failed information.
3. Check the failed reasons to determine the type of problems that need resolving.
4. From the Filter drop-down list, select the error that you want to handle.
5. Select the top (Select All) checkbox to select all of the issues with the same error.
6. Depending on the problem, resolve the issue by performing the actions described below:



- [Format Problems](#)
- [Metadata Errors](#)
- [Validation](#)
- [File Fixity](#)
- [Virus Check](#)

For each of these actions, the TA can create an auto-correction rule that records the decision and performs these actions automatically the next time the same thing happens. (See [Automating Corrections](#).)

Format Problems

When Rosetta cannot match a file to a single format (based on its unique file signature), the TA must manually choose a format ID and assign it to the file.

To do this, click the Format link that corresponds to the file to which you want to assign a format.

The Format ID page opens:

Assign Format Manually

After Rosetta identifies a format (or the TA has done it manually), the system matches the file's extension to the list of valid extensions as they are stored in the format library.

Incompatible File Extension

If there is a mismatch, the TA can select a format to use for this extension or ignore this problem. The TA can also select a reason and add a comment to the file's DNX.



Submissions: Technical Issues / Details

There is a mismatch between the format ID of the file: 0ccc46a3-2ab4-4432-ac7f-f84500589cfb.doc and its file extension. To ignore this mismatch press OK

Ignore (keep fmt/43)
 Manually assign fmt/37
 Manually assign fmt/38
 Manually assign fmt/39
 Manually assign fmt/40
 Manually assign other format:

Remember my decision concerning the chosen format

Reason:

Optional Note:

Action Reason for Ignoring Mismatched Extension

You can select the Remember my decision concerning the chosen format checkbox to create a format identification correction rule based on your response to the error. Rosetta will automatically handle similar format identification errors in the same way. For more information on format identification correction rules, see [Validation Stack Rules](#).

Metadata Errors

If the metadata extraction tool (for example, JHOVE, NLNZ MD Extractor) fails to extract technical MD, the file waits for the TA to evaluate the problem. The TA can handle this issue by clicking the MD Error link. This allows the file to continue processing without the technical MD.

Validation

If a validation error is detected in the file, the file waits for the TA to evaluate the problem. The TA can handle this issue by clicking the Validation link. This allows the file to continue processing without being validated.

File Fixity

If a fixity error is detected in the file, the file waits for the TA to evaluate the problem. The TA can handle this issue by clicking the Fixity link. The TA can then choose to regenerate the fixity values.

Virus Check

If a virus is detected in the file, the file waits for the TA to evaluate the problem. The TA can handle this issue by clicking the Virus link.

Rerunning Processes

Technical Analysts can re-run processes that fail to produce successful results. The following processes can be performed to this end:

- [Rechecking a File](#)
- [Rerunning Validation](#)



- [Rerunning Enrichment](#)
- [Rerunning System Errors](#)

Rechecking a File

Technical Analysts can rerun validation checks on the files.

To recheck a file:

1. On the SIPs List page (see [Accessing the Technical Issues Page](#)), click the Validation folder.
2. Find the SIP that contains the file you want to recheck and click Work On in its row. The SIP details open with the Content List tab displaying the files contained in the SIP.
3. To recheck only one file, click the Recheck text link in the file's row. To recheck multiple files, select the check boxes of the files that you want to recheck and select Recheck from the actions drop-down list, then click Execute.

The screenshot shows the Rosetta system interface for a SIP. At the top, there is a header with fields: SIP ID (1843), Producer (Ex Libris Demo Producer), Producer Agent (John Smith), Deposit Activity ID (18294), Material Flow Name (CSV Upload), Material Type (Digitised Images), Title (-), Selected Access Rights (No restrictions), and Submitted On (05/02/2018 17:32:08). Below the header are tabs for Content List, Metadata, Notes, and History. A filter section includes a dropdown menu set to 'All', a 'Find' input field, and a 'Go' button. Below the filter is a 'View' dropdown set to 'Default Paging' and a record count of '1 - 1 of 1 Records'. The main table has columns: File Name, PID, Status, Problems, Download, Replace, Recheck, Edit, View, and Format. The first row shows a file named 'TEAC(2)' with PID 'FL61980' and a status of '1 Tasks failed'. A 'Back' button is on the left, and a 'Recheck' dropdown menu is open on the right, showing options: Move to next step, Move to next step, Actions on the SIP, Rerun, Decline SIP, Assign, Assign to, Unassign, File, Decline File, and Recheck. An 'Execute' button is also visible.

RecheckSIP Files

The Rosetta system runs the validation check again.

During a recheck, Rosetta exhibits the following behavior:

- A message: "Rechecking file(s) \{pids\}" is displayed
- Files are not displayed in the list
- If the recheck fails, an error message: Recheck failed, please contact your system administrator is displayed
 - When the task is complete, the Rechecking file(s) pid message disappears, and files with errors (after recheck), if they exists, are displayed in the list again
 - All file-level operations are available.
 - During the recheck, all SIP level operations are available, including Move to next stage.
 - Trying to execute actions other than Assign and Un-Assign will display a message: SIP(s) \{ids\} is being rechecked - please try again later.



Rerunning Validation

If validation stack tasks fail to process a file, Technical Analysts can rerun the validation process for problematic files. To rerun validation for problematic files:

1. On the SIPs List page (see [Accessing the Technical Issues Page](#)), in the Folders pane, click Validation.
2. Select the check box(es) beside the file(s) for which you want to rerun the validation process.
3. In the Action drop-down list, select Rerun.
4. Click Execute.

The Rosetta system runs the validation process again. If validation is successfully completed, the file is removed from the SIPs List page.

Rerunning Enrichment

If the enrichment process fails for technical reasons, Technical Analysts can rerun the enrichment process for problematic SIPs.

To rerun the enrichment for problematic SIPs:

1. On the SIPs List page (see [Accessing the Technical Issues Page](#)), in the Folders pane, click Enrichment.
2. Select the check box(es) beside the SIP(s) for which you want to rerun the enrichment process. To rerun the enrichment process on particular files within a SIP, click Work On in the SIP's row and then select the check box(es) beside the file(s).
3. In the Action drop-down list, select Rerun.
4. Click Execute.

The Rosetta system runs the enrichment process again. If enrichment is successfully completed, the file is removed from the SIPs List page.

Rerunning System Errors

When SIP processing fails continuously (up to five times), SIPs are placed in the System Error folder. TAs can attempt to fix the system problems, which may be caused by lack of memory or an Oracle disconnect or something else. If rerunning the SIP still fails, the TA or System Administrator should look at the log and attempt to solve the problem. To rerun a SIP with a system error:

1. On the SIPs List page (see [Accessing the Technical Issues Page](#)), in the Folders pane, click System Error.
2. Select the check box(es) for the SIP(s) you want to rerun.
3. Select Rerun from the Actions drop-down menu.
To rerun all of the SIPs in the System Error list, skip step 2 above and, instead of selecting Rerun (step 3), select Rerun All from the Actions drop-down menu.
4. Click the Execute button.

The Rosetta system runs the SIP process again on the SIPs you selected.



Viewing and Resolving Repository Issues

Technical Analyst Issues in the Repository

Technical Analysts (TAs) who work with issues arising from maintenance on the permanent repository are referred to as Repository TAs. Their tasks involve solving problems that are identified when validation stacks are run on parts or all of the repository.

Repository TAs perform actions similar to those of SIP TAs, although Repository TAs work with data that already exists in the repository, not with submission packages.

Repository TAs also address technical issues related to adding or updating a representation. (For more information on representations, see the chapter for Editors, [Adding a Representation: Process and Steps.](#))

Identifying Repository TA issues

Typically, repository TA issues are identified when validation stacks are run at regular intervals by Data Managers. When results of the validation checks show problems with format identification, virus checks, technical metadata extraction, fixity, and/or risk extraction, Data Managers can view the problematic files on the Monitor Process History page (a status of Waiting... indicates a file for the Repository TA to handle). They can also configure the process to send an email notification to the TA when an object has been flagged.

Repository TAs can also access flagged issues by following the menu path: Data Management > Manage Sets and Processes > Technical Issues and viewing any items that exist there.

After running a validation stack on part or all of the permanent repository, the TA can determine which items require further manual processing.

IEs containing files that fail the validation stack appear on the Validation tab of the Data Management > Manage Sets and Processes > Technical Issues path.

Mode	IE PID	Title	Process ID	Process Owner	Problems	Assigned To			
Taskchain	IE53343	Digital Preservation	16716403	admin1	100% failed	admin2	Events		
Taskchain	IE47698	Migration Test	16716403	admin1	100% failed	admin1	Work On	Ignore	Unassign
Taskchain	IE53941	test	16716403	admin1	100% failed		Work On	Ignore	Unassign
Taskchain	IE48758	test for mobile	16716403	admin1	100% failed		Work On	Ignore	Unassign
Taskchain	IE18784	UIBK - Sample Files	16716403	admin1	100% failed		Work On	Ignore	Unassign
Taskchain	IE13640	IE1640 linearized	16716403	admin1	100% failed		Work On	Ignore	Unassign
Taskchain	IE24270	Merged IE	16716403	admin1	100% failed		Work On	Ignore	Unassign
Taskchain	IE53927	test RD	16716403	admin1	100% failed		Work On	Ignore	Unassign
Taskchain	IE53934	demo1	16716403	admin1	100% failed		Work On	Ignore	Unassign
Taskchain	IE17834	Sanity_Test (1)	16716403	admin1	100% failed		Work On	Ignore	Unassign

Permanent Repository TA Work Area

From here, you can Work On, Ignore, or Unassign a failed IE. Or you can use the check boxes and options from the



drop-down box at the bottom of the page and click Execute to perform an action on more than one object at a time. To view a breakdown of problematic files on the various checks comprising the validation stack, click the blue arrow in the Problems column.

Mode	IE PID	Title	Process ID	Process Owner	Problems	Assigned To	Events
Taskchain	IE53343	Digital Preservation	16716403	admin1	100% failed	admin2	Events
Taskchain	IE47698	Migration Test	16716403	admin1	100% failed	admin1	Work On Ignore Unassign
Taskchain	IE53941	test	16716403	admin1	100% failed		Work On Ignore Unassign
Taskchain	IE48758	test for mobile	16716403	admin1	100% failed		Work On Ignore Unassign
Taskchain	IE18784	UIBK - Sample Files	16716403	admin1	100% failed		Work On Ignore Unassign
Taskchain	IE13640	IE1640 linearized	16716403	admin1	100% failed		Work On Ignore Unassign

Breakdown of Problem Files

To dismiss an IE that you determine cannot or will not be fixed in the near future, click the Ignore action of the corresponding row. This removes the IE from the TA work area and sends it to the process exception list, which indicates to the Data Manager that the IE did not pass the tasks contained in the process. The object is rolled back to a previous version.

If an object is assigned to someone and you want to assign it to a different TA or to yourself, use the Unassign action on the far right of the page.

Correcting Problems

To address problems with a failed object, click the Work On link of the row containing the item. Details and options for the IE open in the Content List tab.

File Name	PID	Problems	Download	Recheck	Info	View	Format	Events
Sanity_Test (1).pdf	FL47700	Tasks failed						

Working On in the TA Repository List

Each file belonging to the IE is listed on the Content List tab.

Problematic files can be handled individually using the Actions links for each row or in groups of two or more (by selecting the check boxes followed by an action from the Execute drop-down menu below). Available actions vary according to the file type and the task chain performed. The following actions are available either on the Actions for individual files or in the drop-down Execute actions list:

- Download allows you to copy the file to a local or network drive, open it, and work on it, then replace the failed file in the repository with the one you repaired.
- Replace provides a 2-step wizard for uploading your repaired file from a network or local drive to Rosetta. This file replaces the existing failed file. On selecting a file, the user sees a list with the original filename in strikethrough text and the replacement file name. Clicking Continue triggers an Update Representation process. The TA is returned to the IE list and the IE appears with no row actions and a "replacing file(s)" indication. If Rosetta encounters technical issues with the replacement,



the IE appears in Update Rep mode for further analysis (see [Managing Issues with File Replacements](#)).

The TA will need to resolve all non-replace issues (ignores, rules) before replacing a file.

- Recheck reruns a validation check on the file(s).
- Info links to the item in the Web Editor, where you can make any necessary changes to repair the file or IE. When Edit appears as an action, it has the same function.
- View displays the file associated with the IE and its metadata.
- Error-driven actions such as Fixity and File Ext depend on the type of error(s) that the validation stack returns. See [Validation Stack Error Codes](#) for details.
- Events opens a log of significant events that have occurred in relation to the object. Each event lists an Event ID that links to more details.

Managing Issues with File Replacements

The Update Rep mode indicates a problem with a new or replacement file, provided either using the Add/Update Representation function in the Web Editor, the corresponding APIs, or the Replace function in the Repository TA (task chain mode).

The TA can fix the problem using the same tools as in Task chain mode. Replacing a file in Update Rep mode deletes the original replacement file (similar to SIP TA replacement) and not generate an additional Update Representation process (since the replacement file was never committed to the permanent repository).

If the Update Representation process was triggered by the Repository TA (in task chain mode), aborting the process returns the IE to task chain mode.



Validation Stack Rules

Automating Corrections

Auto-correction rules are created, edited, and implemented by Technical Analysts (TAs) during the validation of SIPs. When the validation process encounters errors, the TA can manually correct the error and assign the same correction to subsequent matching errors. For instance, when a file fails validation because Rosetta cannot match the file's extension to a known format, the TA can decide that, for example, a .j123 will always be read as a .jpg. This rule can be automated to apply to all occurrences of .j123.

For more information on handling errors and creating rules, see [Adding a Rule](#).

The types of validation stack errors that a TA may configure are:

- Format identification auto-correction rules: If the format identification task unambiguously associates a file with a format, and the Technical Analyst can determine the correct format, a rule can be created to auto-assign it to a specific format.
- Metadata extraction error handling rules: TAs can define rules that ignore errors returned by the metadata extraction task that are deemed irrelevant or non-critical for preservation.
- Format validation error handling rules: TAs can define rules that ignore error returned by the format validation task that are deemed irrelevant or non-critical for preservation.
- Virus check error: If the virus check plug-in returns an error message that the TA determines does not indicate a threat, a rule can be created to ignore the error.

Rosetta adds an event with rule parameters to the file when a rule is applied. These events can be searched under the following fields:

- Format Identification Auto Correction Criteria
- Metadata Extraction Error Ignore Criteria
- Format Validation Error Ignore Criteria
- Virus Check Error Ignore Criteria

When a rule is triggered, a provenance event is generated with the rule parameter details.

Configuring Validation Stack Rules

Technical Analysts can configure validation rules from the Management Home page, Submissions menu, under the Rules heading. The types of validation stack rules display in the list. (For information on the types, see the bulleted list in the above section, [Automating Corrections](#).) To add, edit, or delete a rule, click the link that describes the type of error on which the rule is based.

Clicking the Format Identification Correction, for example, opens a list of rules related to format identification errors:



	Id	Name	Description	Creation Date	Modification Date			
1	4	Multiple Text Files file formats	Define a single definite file format for text files	08/01/2024 19:08:05		Update	Duplicate	Delete
2	5	Tentative MP3 Files file format	Define the file format of MP3 files as definite and not tentative	08/01/2024 19:08:05		Update	Duplicate	Delete
3	6	Multiple Excel Files file formats	Define a single definite file format for Excel files	08/01/2024 19:08:05		Update	Duplicate	Delete
4	7	Multiple TIFF Files file formats	Define a single definite file format for TIFF files	08/01/2024 19:08:05		Update	Duplicate	Delete
5	3	Multiple RTF Files file formats	Define a single definite file format for RTF files	08/01/2024 19:08:05		Update	Duplicate	Delete
6	20	Multi Word doc	Matches BFF and MS word, match on ext to make sure its a DOC	08/01/2024 19:08:05		Update	Duplicate	Delete
7	21	Tentative JP2 Files	Map tentative .jpeg2000 files	08/01/2024 19:08:05		Update	Duplicate	Delete
8	22	Tentative LOG files	Map tentative LOG files	08/01/2024 19:08:05 09/01/2024 14:27:22		Update	Duplicate	Delete
9	23	Tentative ARC file format	ARC format correction rule	08/01/2024 19:08:05		Update	Duplicate	Delete
10	24	Multiple PDF file format	PDF format correction rule	08/01/2024 19:08:05		Update	Duplicate	Delete

List of Rules Page

The following actions can be performed on the List of Auto-Correction Rules page:

- [Adding a Rule](#)
- [Updating a Rule](#)
- [Re-Ordering Rules](#)
- [Duplicating a Rule](#)
- [Activating and Deactivating a Rule](#)
- [Exporting a Rule](#)
- [Deleting a Rule](#)

Adding a Rule

To add a rule to one of the validation stack error types, Technical Analysts define one or more parameters on the Rule Details page. (To omit one or more of the parameters, leave the operator as Any.)

- Input parameters:
 - Producer name, if matching by Producer
 - Preservation Type to which the preservation type of a problematic file is compared
 - Format name to which the format of a problematic file is compared
 - File extensions to which the file extension of a problematic file is compared (add the extension manually if the extension does not appear in the Format Library list)
 - Mime type, if comparing a file on the basis of its MIME type
 - File size and creation date, for comparison on those data
 - Error ID (for Metadata Extraction error) for comparison on the identifiers of JHOVE error messages
 - Additional fields specific to the type of rule being added or edited
- Output parameters (one of the below):
 - The file format that must be applied to the file if its file format and extension match the input parameters
 - The reason for ignoring errors that match the input parameters

To add a validation stack error rule:

1. From the Submissions rollover menu, Rules column, click the type of error to which you want your new rule to apply:



- Format Identification Correction
- Metadata Extraction Error
- Virus Check Error

The Rule List page for that error opens.

2. Click the Add Rule button.

The Rule Details page opens. Parameters vary slightly based on the rule type.

The screenshot shows the 'Rule Editor' for 'Submissions: Format Identification Correction'. It includes a metadata section with 'Created By: John Smith' and 'Created on: 09/01/2024 16:53:52'. The main area is divided into 'Input General Parameters' and 'Output Parameters'. The 'Input General Parameters' section has dropdowns for 'Error Type', 'Producer Name', 'Format Name', 'Extension', and 'Mime Type', each with a list of items to select. The 'Output Parameters' section has dropdowns for 'Format Name' and 'Reason'. At the bottom, there are 'Cancel' and 'Save' buttons.

Rule Details for Format Identification Correction

3. Enter a name and description for the rule in the corresponding fields.
 4. Select an operator and one or more value(s) for the input parameters you want the rule to use. If, for example, you want to narrow the rule to apply only to work deposited on behalf of a particular Producer, then for the Producer parameter, select List Equals and the particular Producer(s) from the right-side list box.
- The format value list uses the format identifiers taken from the format library.
 - For detailed information about operators and parameters, see **Operators Used in Rule Parameters** on.



5. Click Save.

The Rosetta system saves the new validation stack rule and can use it to identify a specific action to be taken.

Updating a Rule

Technical Analysts can update a rule to modify its input or output parameters.

To update an auto-correction rule:

1. On the List of Rules page, locate the auto-correction rule that you want to update and click Update. The Rule Details page opens.
2. Modify the fields that you want to update, and then click Save.

The Rosetta system now uses the updated parameters.

Re-Ordering Rules

To determine the rule that must be used for a specific file, the Rosetta system compares the input parameters defined in a rule with the parameters of the file.

Rules are analyzed in the same order as they are displayed on the List of Rules page. The Rosetta system uses the first auto-correction rule found that match the parameters of the file.

Technical Analysts can change the order of rules.

To re-order auto-correction rules:

1. On the List of Rules page, in the Set Order column, use the up and down arrows to change the order of the rules.
2. Click Save.

The Rosetta system now processes the rules in the newly defined order.

Duplicating a Rule

Technical Analysts can duplicate an existing rule. This is especially helpful when creating a new auto-correction rule. It is often faster to duplicate an existing auto-correction rule and then modify it, than to create a new rule.

To duplicate a rule:

On the List of Rules page, locate the auto-correction rule that you want to duplicate, and click Duplicate in its row.

An exact copy of the rule is added to the List of Rules page. The Rosetta system automatically labels the new rule with the name Copy of followed by the name of the original rule.

Activating and Deactivating a Rule

Technical Analysts can activate or deactivate a rule. After an auto-correction rule is deactivated, it is no longer available to the Rosetta system for matching.

On the List of Rules page, the status of the rule is indicated by the check mark in the Active column:

- Yellow – The auto-correction rule is active.
- Grey – The auto-correction rule is inactive.

To activate or deactivate an auto-correction rule:



1. On the List of Rules page, locate the auto-correction rule you want to activate or deactivate.
2. In the Active column, click the check mark.

The page refreshes, and the check mark in the Active column indicates the new status. (The rule is changed from active to inactive, or from inactive to active.)

Exporting a Rule

Technical Analysts can export rules to share them with other institutions.

To export rules, on the List of Rules page, click Export Rules. Rosetta generates a CSV with all the rules' details.

Deleting a Rule

Technical Analysts can delete an existing rule. After a rule is deleted, it is no longer available to the Rosetta system for matching.

To delete a rule:

1. On the List of Rules page, locate the rule you want to delete and click Delete. The confirmation page opens.
2. Click OK.

The rule is deleted from the Rosetta system.



Understanding Data Editors

This page was not added to the PDF due to the following tag(s): article:topic-guide



Data Managers

This page was not added to the PDF due to the following tag(s): article:topic-guide



Understanding Data Managers

Data Managers schedule processes, manage sets, and run activities that affect multiple IEs. Data Managers are responsible for:

- Managing sets
- Scheduling and monitoring processes
- Publishing configurations, and
- managing the recycle bin.

Data Managers can also work with individual IEs, but their primary role is to work on groups of data at an institutional level.

Permissions for Data Managers differ slightly from those of most other roles. Data Managers can have Typical permissions, which include adding/editing and deleting IEs or they can have Full permissions, which include all the abilities of the Typical permissions as well as the ability to purge items that have been deleted.

Data Managers' scope can be either institutional or consortial.

For information on Access Rights Policies and Retention Rights Policies, see [Access Rights](#) and [Retention Policies](#).



Working with Sets

About Sets

To facilitate searching and accessing intellectual entities (IEs) that are stored in the Rosetta repository, Data Managers can create sets of IEs. A set is a group of objects (complete IEs, representations, or individual files) that satisfies criteria defined by Data Managers, such as matching on the creation date or the Producer's name.

Data Managers can include in sets those objects that are frequently accessed. Then, instead of running a search every time such objects are required, a Data Manager accesses the appropriate set.

Data Managers can create an itemized set or a logical set.

- An itemized set contains a static group of objects that satisfies certain criteria. Data Managers manually select the objects to be stored in the set from the results of the search.
For example, if a Data Manager runs a search for Monet artworks and 25 objects are found, the Data Manager can select 10 paintings and save them as an itemized set. The Data Manager can then access this set and work with the objects without having to search for these paintings again.
The itemized set is static—that is, even if new objects that satisfy the criteria are moved to the Rosetta repository, the itemized set does not change. However, Data Managers can manually add new objects to an existing itemized set.
- A logical set contains:
 - A search request defined by a Data Manager
 - All objects that satisfy the search request
For example, if a Data Manager runs a search for Monet artworks painted in 1890-1900, all objects that satisfy these criteria are automatically included in the set.
The logical set is dynamic—that is, it is updated every time Data Managers access the set and run the search request. New objects that satisfy the search criteria are automatically added to the set.

Data Managers can manage both itemized and logical sets using the Manage Sets page.

Accessing the Manage Sets Page

The Manage Sets page enables Data Managers to create and manage both itemized and logical sets.

To access the Manage Sets page:

From the Management Home page, click the Data Management link in the header or on the main pane. From the Data Management page, click Manage Sets under the Manage Sets and Processes heading. The Manage Sets (Set List) page opens.



Data Management: Sets

Filter: All Find: inc: All Go

Add Set 1 - 10 of 39 Records 1 2 3 > >>

Active	ID	Name	Set Type	Object Type	Count	Created By	Creation Date	Update	Results	Delete
1	55795	File level set 78110	Logical	File	316	admin1	14/02/2018 02:03:01	Update	Results	Delete
2	57339	MissingES_SET_3KL	Logical	File	3	admin1	14/02/2018 02:05:43	Update	Results	Delete
3	57343	MissingES_SET_k8M	Logical	Intellectual Entity	3	admin1	14/02/2018 02:07:12	Update	Results	Delete
4	126484	Pagination set test	Logical	Intellectual Entity	0	admin1	14/02/2018 07:54:51	Update	Results	Delete
5	126485	Pagination test-0	Logical	Intellectual Entity	0	admin1	14/02/2018 07:55:00	Update	Results	Delete
6	126486	Pagination test-1	Logical	Intellectual Entity	0	admin1	14/02/2018 07:55:06	Update	Results	Delete
7	126487	Pagination test-2	Logical	Intellectual Entity	0	admin1	14/02/2018 07:55:12	Update	Results	Delete
8	126488	Pagination test-3	Logical	Intellectual Entity	0	admin1	14/02/2018 07:55:17	Update	Results	Delete
9	126489	Pagination test-4	Logical	Intellectual Entity	0	admin1	14/02/2018 07:55:25	Update	Results	Delete
10	126490	Pagination test-5	Logical	Intellectual Entity	0	admin1	14/02/2018 07:55:30	Update	Results	Delete

1 - 10 of 39 Records 1 2 3 > >>

Back

Manage Sets - Set List Page

- To view an itemized set, click Members.
- To view a logical set, click Results.

Creating Sets

Data Managers can create the following types of sets:

- Logical sets to store search queries that result in dynamically updated groups of objects
- Itemized sets to store static groups of objects

Creating a Logical Set

Logical sets function as queries or filters that select a new set of IEs each time they are run.

To create a logical set:

1. On the Data Management main menu (see [Accessing the Manage Sets Page](#)), above the sets list, click Add Set. The Add Set page opens, step 1 of the Add Set wizard.

Data Management: Sets / Details 1 2 3

Choose the type of set you would like to create

Logical - Based on a search query

Itemized - Based on selected objects

Cancel Next

Add Set Page

2. Select Logical - Based on a search query, and click Next.

The Set Details page opens.



Set Details Page

- Complete the fields as described in the following table:

Set Details Page Fields

Field	Description
Name	The name of the set as you want it to appear in Set List pages and applicable lists of sets.
Description	A brief description of the set's content or parameters.
Notes	Any notes associated with the set.
Status	<p>The status of the set:</p> <ul style="list-style-type: none"> Active - The set is processed by the Rosetta system. Inactive - The set is not processed.
Status Date	The date that the status was last set.
Private	<p>The permissions that define who can access the set:</p> <ul style="list-style-type: none"> Yes - The set is accessible to other Data Managers. No - The set is accessible only to the Data Manager who created the set.

- Click Next.
Step 3 of the wizard opens.
Logical sets display the Simple Search page with the option to switch to the Advanced Search page.



Simple Search for Adding a Logical Set

5. Create the query for your search using the search form.
6. Click the Go button to run the search.
The system returns results. For an explanation of results columns, see the table below.
7. If the results are appropriate for the purposes of your query, save the query. If the results are not adequate, alter some or all of your query and rerun the search.
8. Save the query/logical set.
When you save the logical set, you are saving only the query, not the items returned in this particular search. When the database changes, your query may return different IEs.

Logical Sets - Updating

Data Managers can change both the general information of a set as well as the query criteria. To update the general information for a logical set:

1. On the Manage Sets > Set List page (see [Accessing the Manage Sets Page](#)), locate the set you want to change and click Update.
The Set Details page opens.
2. Modify the fields as described in the table [Set Details Page Fields](#), and click Save.

To update a query for a logical set:

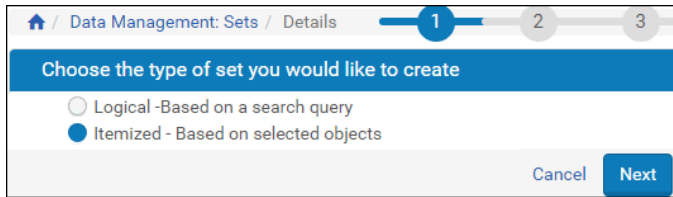
1. On the Manage Sets > Set List page, locate the set you want to change and click Results in the corresponding row.
2. Edit the search conditions as needed and click Search.
The updated query results show on the Results section of the page.
3. Once you are satisfied with the query results, click Save to update the logical set query.

Creating an Itemized Set

Itemized sets are comprised of a group of IEs that have been selected through a simple or advanced Rosetta search or through a text file of PIDs prepared by your institution. Both methods are described in the procedure below. To create an itemized set:

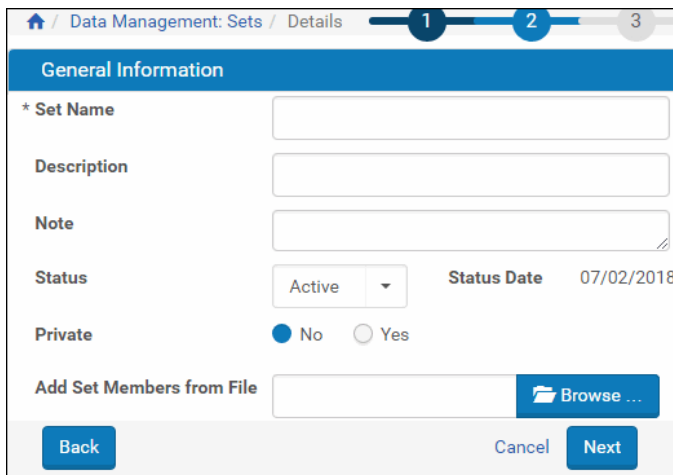


1. On the Data Management main menu (see [Accessing the Manage Sets Page](#)), above the sets list, click Add Set. The Add Set page opens, step 1 of the Add Set wizard.



Add Set Page

2. Select Itemized - based on selected objects, and click Next. The Set Details page opens.



Set Details Page for Itemized Set

3. Complete the fields as described in the [Set Details table](#).
4. To search to create a set of items:
 - a. Click the Next button and enter search terms and parameters in the available fields.
 - b. Select the Search level - IE, Representation, or File.
 - c. Click the Go button.

The system returns matches to your search.



Itemized Set: General Common Set

Number of Set Members: 0

Search Conditions

Search level: Intellectual Entity Representation File

Add Conditions

Match: All of the following conditions:

SIP ID

Results

21 - 30 of 7,806 Records

<input type="checkbox"/>	Title (DC)	Type (DC)	IE PID	SIP ID	Producer Name	IE Creation Date				
<input type="checkbox"/>	Women as Soldiers	Sound	IE1310	23	Demo Internal Producer	04/11/2010	View	IE Viewer	Editor	Export
<input type="checkbox"/>	George Bent and wife Maggie or Black Bird, photograph	Image	IE1316	25	Demo Internal Producer	04/11/2010	View	IE Viewer	Editor	Export
<input type="checkbox"/>	Arc de Triumph	Unpublished	IE13200	97	Demo Internal Producer	15/03/2011	View	IE Viewer	Editor	Export
<input type="checkbox"/>	Pisa	Unpublished	IE13203	97	Demo Internal Producer	15/03/2011	View	IE Viewer	Editor	Export
<input type="checkbox"/>	Raider	Unpublished	IE13206	97	Demo Internal Producer	15/03/2011	View	IE Viewer	Editor	Export
<input type="checkbox"/>	Siena	Unpublished	IE13209	97	Demo Internal Producer	15/03/2011	View	IE Viewer	Editor	Export
<input type="checkbox"/>	Taj Mahal	Unpublished	IE13212	97	Demo Internal Producer	15/03/2011	View	IE Viewer	Editor	Export
<input type="checkbox"/>	Tomb	Unpublished	IE13215	97	Demo Internal Producer	15/03/2011	View	IE Viewer	Editor	Export
<input type="checkbox"/>	Art	Unpublished	IE13218	97	Demo Internal Producer	15/03/2011	View	IE Viewer	Editor	Export
<input type="checkbox"/>	Brandenburg Tor	Unpublished	IE13221	97	Demo Internal Producer	15/03/2011	View	IE Viewer	Editor	Export

Add Selected 21 - 30 of 7,806 Records

Set Members Page (Itemized Set)

The table contains the following columns:

Add Set Page Columns

Column	Description
<input type="checkbox"/>	Selecting these enables Data Managers to perform an action on multiple items.
Title	Displays the title of the set member.
Type	The type of the object.
PID	Displays the unique deposit number assigned to the set member.
SIP ID	Displays the unique SIP number assigned to the set member.
Producer Name	Displays the name of the set member's Producer.
Creation Date	Displays the creation date of the set member.
View	Enables viewing the member using the Rosetta Delivery module.
IE Viewer	Enables viewing the member using a Web browser.
Editor	Opens the member in the metadata editor.
Export	Exports the IE to a zip file.

- d. If the system returns results you want for your set, select the check boxes beside the results, and then click



the Add Selected button. If the system returns no items you want for your set, try different search parameters.

e. Repeat searches and add selections as necessary.

f. When you have your set, click the Save button.

The system saves your set and returns you to the Set List page.

To upload a text file containing the PIDs you want to include in your set, do the following:

1. Create a .txt file with one PID per line. PIDs should take the form of IE[n], where n is the multi-digit ID. For example, IE2984.
2. Click the Browse button of the Add Set Members from File field.
3. Browse to the PID text file on your computer, select it, and click Open.
4. Click the Next button.
The text file loads, and the system checks for matches in the database. It returns a status message at the top of the Set Members page.
5. You can remove any items by selecting their check boxes and clicking the Delete Selected button.
6. To complete the set, click the Add Members button to open the Simple Search page. From here you can conduct a search for more items or, if you are satisfied with your set, conduct a mock search that will take you to the next page where you can save your set.

5. After you save your itemized set, the system returns you to the Set List page, where the new set appears in the list.

Sets can be created and updated using APIs. For more information, see the SDK documentation.

Itemized Sets - Adding Members

Data Managers can add members to the itemized set by performing a search and manually selecting the members or by uploading members from a file. You add members to an itemized set from the Set Members page:

The screenshot shows the 'Set Members' page in the Data Management interface. The page title is 'Itemized Set: First set for assign by DC'. Below the title, there are 'Sort' and 'Columns' tabs. The 'Set Level' is set to 'Intellectual Entity'. There are four 'Sort By' fields, each with a dropdown menu set to 'Asc'. Below the sort fields are 'Clear Sort' and 'Apply Sort' buttons. The 'Members' section shows a table with the following data:

ID	Title (DC)	Classification	Parent ID	Type (DC)	IE PID	SIP ID	Display Name	IE Creation Date	View	IE Viewer	Editor	More Act.
1	Article1 012022	Content			IE7762	1222	Demo Internal Producer	19/04/2023	View	IE Viewer	Editor	More Act.
2	Article2 012022	Content			IE7765	1223	Demo Internal Producer	19/04/2023	View	IE Viewer	Editor	More Act.
3	Article3 012022	Content			IE7768	1224	Demo Internal Producer	19/04/2023	View	IE Viewer	Editor	More Act.
4	Article4 022022	Content	IE7889		IE7771	1225	Demo Internal Producer	19/04/2023	View	IE Viewer	Editor	More Act.

Below the table are 'Delete Selected' and 'Delete Set Members from File' buttons. At the bottom, there are 'Back', 'Add Set Members from Search', and 'Add Set Members from File' buttons.

Set Members

Adding Members to an itemized Set by Performing a Search

You can add members to an itemized set by performing a search.

To add members to an itemized set by performing a search:



1. From the Set Members page of a new or existing set (see [Creating Sets](#)), click the Add Members from Search button.
2. Perform a simple or advanced search in the row above the sort selection fields. For details on simple and advanced searching, see [Searching and Reporting For All Staff](#). The search is limited to items at the same search level as the existing members of the set.
3. From the results of the search, select the members that you want to add to the set by clicking the members' check boxes.
4. Click Add Selected.
5. Click Save.

New members are added to the itemized set. Data Managers can access the members at any time.

Sorting and Displaying the List of Members

From the Sort tab at the top of the List of Members page you can enter up to four levels of sort criteria to sort the list of members. Each sort level can be set as ascending or descending.

From the Columns tab you can select which columns appear in the List of Members table.



Columns Tab

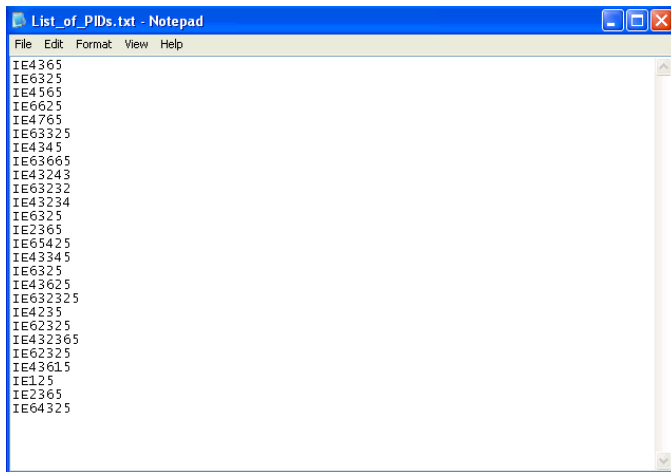
Additionally, you can select an icon to display the table either as a list or as thumbnails.

Adding Members to an itemized Set by Uploading Members from a File

You can add or delete members to an itemized set by uploading a list of IEs from a file. The file must meet the following conditions:

- Only .txt files are valid (Excel, Word, RTF and all other formats are not supported)
 - The PIDs in the file must have the prefix IE, which means:
 - IE1433 – valid PID
 - 1433 – not a valid PID
 - Each PID must be written on a separate line
- The following is an example of a valid file:





To add members to an itemized set by uploading members from a file:

1. From the Set Members page of a new or existing set click the Add Set Members from File button.
2. Select a file and click Upload.

New members are added to the itemized set. Data Managers can access the members at any time.

To delete members from an itemized set by uploading members from a file:

1. From the Set Members page of a new or existing set click the Delete Set Members from File button.
2. Select a file and click **Upload**.
The members in the file are deleted from the itemized set.

Deleting a Set

Data Managers can delete a set. However, the Rosetta system does not enable Data Managers to delete a set that is scheduled for, or is being used in, a task.

To delete a set:

1. On the Manage Sets > Set List page (see [Accessing the Manage Sets Page](#)), locate the set that you want to delete and click Delete. The confirmation page opens.
2. Click OK.
The set is deleted from the Rosetta system.



Working with Processes

About Working with Processes

Data Managers can view processes that are executed in the Rosetta system. Processes consist of:

- Tasks, which are programs that perform operations on an object in the system. For example, a task may create a thumbnail of an image file. Similarly, a task may extract metadata from a file. Tasks are the basic building blocks of operations in the system.
- Task chains, which are ordered lists of tasks. For example, a task chain may contain the following tasks:
 - Creating thumbnails
 - Adding metadata from the collection management system (CMS)
 - Adding Oracle text (used for better indexing in the Permanent Repository)

Viewing All Existing Processes

Data Managers can view a list of all existing processes.

To view all existing processes:

From the Data Management main menu, select Manage Sets and Processes > Processes. The Process List page opens.

Active	ID	Name	Job Chain Name	Job Chain Group	Scheduling	Start Date	Run Now
<input type="checkbox"/>	1014173	add to the Randomly Collected	Add to collection (by name)	Enrichment Move to Permanent Repository - Duplicate	Not Scheduled	10/05/2012 22:18:53	Run Now
<input type="checkbox"/>	2390288	add to PPS	Top Administrator	Validation Step, Enrichment Move to Permanent Repository, Validation Move to Permanent Repository, Enrichment Move to Permanent Repository, Enrichment Move to Permanent Repository	Not Scheduled	25/04/2018 14:36:23	Run Now
<input type="checkbox"/>	1157769	assign to Random	Assign R1	Maintenance, Validation Permanent	Not Scheduled	28/10/2013 12:08:18	Run Now
<input type="checkbox"/>	1480301	add to PPS for a PPS	Add to collection (by name)	Enrichment Move to Permanent Repository - Duplicate	Not Scheduled	17/06/2013 07:34:19	Run Now
<input type="checkbox"/>	1540556	add to Collection	Add to collection (by name)	Enrichment Move to Permanent Repository - Duplicate	Not Scheduled	14/09/2014 17:05:24	Run Now

List of Processes Page

The page contains the following columns:

List of Processes Page Columns

Column	Description
Check Box	Select to perform actions on single or multiple processes
Active	Indicates the process status:



Column	Description
	<ul style="list-style-type: none"> • Yellow - The process is active. • Grey - The process is inactive.
ID	The process ID generated by the Rosetta system.
Name	The name of the process.
Task Chain Name	The associated task chain.
Task Chain Groups	The name(s) of the group that can access the process.
Scheduling	Displays the day, date, and/or frequency of the running of the process.
Status Date	Displays the last date on which the process status was changed.

Actions available for the process list items appear to the right of the information columns and expand when you click the More text with the down arrow. These actions include:

- Duplicate: Duplicates the values for this or any other process listed in the task chain. Sends you through the process creation wizard.
- Update Schedule: Allows you to change the values for the scheduling of this process. (Takes you to the scheduling page.)
- Update Set: Opens the set selection page, where you can choose a different set for this process.
- Update Parameters: Takes you to the Complete Parameters page, where you can change parameter values for this process.
- History: Takes you to the Monitor Process History > Summary page, where you can view information such as status and run-time for the process.
- Delete: Deletes the process from the system and the table. Deleting the process also deletes the process history by the General Cleanup Job.

The Delete, Activate, and Deactivate actions are available from the Action drop-down list. Select the processes on which to run the action, and select the action you want to run from the list.

Viewing Process Information

Data Managers can view various details about the processes, including a list of processes that are currently running and a summary of completed processes. Data Managers view process information by [Accessing the Process Execution History Page](#). The following activities can be performed from this page:

- [Viewing Completed Processes](#)
- [Viewing Process Executions](#)
- [Viewing Summarized Execution History for a Process](#)
- [Viewing the History of Execution Exceptions for a Process](#)

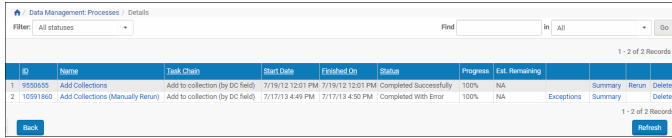


Accessing the Process Execution History Page

The Process Execution History page enables Data Managers to view the list of processes that have been executed in the Rosetta system.

To access the Process Execution History page:

On the List of Processes page (see [Viewing All Existing Processes](#)), locate the process you want to view and click History. The Process Execution History page opens.



ID	Name	Task Chain	Start Date	Finished On	Status	Progress	Est. Remaining	Exceptions	Summary	Details
1	9050903	Add Collections	7/19/13 3:21 PM	7/19/13 3:23 PM	Completed Successfully	100%	NA		Summary	Details
2	10591560	Add Collections (Manually Return)	7/17/13 4:48 PM	7/17/13 4:50 PM	Completed With Error	100%	NA	Exceptions	Summary	Details

Execution History page

The Execution History page contains the following columns:

Execution History Page Columns

Column	Description
ID	The process ID
Name	The name of the process
Status	The status of the last execution
Started On	The start date of the last execution
Finished On	The end date of the last execution
Successes	The count of successful executions of the process
Failures	The count of failed executions of the process
Failure Note	Displays a description of the last failure
Exceptions	Enables viewing the execution history exceptions.
Summary	Enables viewing a summarized execution history of a process.

Viewing Completed Processes

Data Managers can view whether a process completed normally, or experienced a problem during execution.

To view completed processes:

On the History Execution page (see [Accessing the Process Execution History Page](#)), in the Filter drop-down list, select Completed. Only completed processes are displayed.

Viewing Process Executions

Data Managers can view a list of all processes that are currently executing.



To view process executions:

On the History Execution page (see [Accessing the Process Execution History Page](#)), in the Filter drop-down list, select Running. Only those processes currently executing are displayed.

Viewing Summarized Execution History for a Process

Data Managers can view a summarized execution history of a process. This enables them to see a summary snapshot of the process's last execution.

To view a summarized execution history for a process:

On the History Execution page (see [Accessing the Process Execution History Page](#)), locate the process you want to view and click Summary. The Execution History Summary page opens.

Data Management: Processes / Details					
Id	16157610	Name	Export IEs (Manually Executed)	Task Chain	Export Intellectual Entities
Set Id	9630205	Created On	04/02/2016 02:42:59	Created by	admin2
Status	COMPLETED_FAILED	Status Date	04/02/2016 02:43:18	Started On	04/02/2016 02:43:01
		Total Run Time	00hrs 00Min 17Sec	Finished On	04/02/2016 02:43:18
General Information					
Total IEs Processed		111	Total IEs with exceptions		1
Back		Refresh			

Execution History Summary Page

The Execution History Summary page displays the following fields:

Execution History Summary Page Fields

Field	Description
ID	The process ID
Name	The name of the process
Task Chain	The name of the task chain
Set ID	The ID of the set that is using the process
Created On	The creation date of the process
Created By	The name of the user who created the process
Started On	The start date and time of the execution
Finished On	The end date and time of the execution
Status	The status of the execution
Status Date	The date and time of the Status field's last update
Total Run Time	The total run time of the execution. This is based on the Started On and Finished On fields.
Total Records Processed	The total number of objects processed
Total Records with Exceptions	The total number of processed objects with exceptions



Field	Description
Total committed records	The actual number of records committed to the database over the course of this procedure'
Total records sent to commit	The total number of records sent to be committed to the database.

Click Back to return to the previous page.

Viewing the History of Execution Exceptions for a Process

Data Managers can view the history of exceptions for a process.

To view the history of execution exceptions for a process:

On the History Execution page (see [Accessing the Process Execution History Page](#)), locate the process for which you want to view exceptions and click Exceptions. The Execution History Exceptions page opens.

Data Management: Processes / Details				
1 - 1 of 1 Records				
	PID	Title	Exception	
1	IE1000	Coin Test	java.io.FileNotFoundException	View Editor
1 - 1 of 1 Records				
Back		Create Set		Rerun Process

Execution History Exceptions Page

The Execution History Exceptions page contains the following columns:

Execution History Exceptions Page Columns

Column	Description
PID	Displays the ID of the SIP to which the object belongs.
Title	Displays the SIP name.
Exception	Displays a description of the exception.
View	Displays the IE that failed during the initial delivery process.
Info	Opens the object in the Web editor.

You can rerun the process on the items in the exception list by clicking the Rerun Process button.

You can create a set for further use of the exceptions by clicking the Create Set button.

Running a Process

Data Managers can run jobs based on processes and task chains that have been set up in the system. The processes are applied to IEs, representations, or files, as specified in the Level column of the Choose Task Chain page (see below).

To set up a process:



- From the Process List page (Data Management > Manage Sets and Processes > Manage Processes), click the Add Process button.
The first step of the Add Process wizard opens, Choose Task Chain.

	Name	Group	Level	Status	Status Date
1	<input checked="" type="radio"/> (Re)Create Derivative Copies - Audio	Maintenance	INTELLECTUAL_ENTITY	Active	14/09/2010 14:33:04
2	<input type="radio"/> (Re)Create Derivative Copies - Images	Maintenance	INTELLECTUAL_ENTITY	Active	14/09/2010 14:33:04
3	<input type="radio"/> (Re)Create Derivative Copies - Mixed Material	Maintenance	INTELLECTUAL_ENTITY	Active	14/09/2010 14:33:04
4	<input type="radio"/> (Re)Create Derivative Copies - Text	Maintenance	INTELLECTUAL_ENTITY	Active	14/09/2010 14:33:04
5	<input type="radio"/> (Re)Create Derivative Copies - Video	Maintenance	INTELLECTUAL_ENTITY	Active	14/09/2010 14:33:04

Choose Task Chain

- From the list of task chains, select the one that suits your purpose.

The Status should be Active and the Level should match the level of object (IE, representation, or file) that you want the process to encompass.

- Click Next.
Step two of the wizard, entering parameters, opens.

General Info	
Process Name	<input type="text"/>
Priority	Normal
Email Notification	
Send email?	Yes
Email	abc@exlibrisgroup.com
<input type="button" value="Back"/> <input type="button" value="Cancel"/> <input type="button" value="Next"/>	

Parameters Page for Process

- Enter a name for this particular process. The name will be used to identify this process in a list of all processes.
- Select the priority for this process.

Fasttrack processes (processes initiated via the Web Editor) are set to high priority by default.

- Enter any required parameters and enter optional ones, as needed. (Some processes require no parameter specifications, others require several.)
- Set the email notification level to receive an email notification when the process completes, only when it fails, or never. (Your registered email address will be added automatically; recipient addresses can be added, separated by semicolons.) When you are finished, click Next.
Step three of the wizard, defining the set, opens.

Only objects of the type specified in your initial process selection appear in this list. For example, this process acts on files, so the available sets are limited to those with an Object Type of File.



Data Management: Processes / Details

1 - 10 of 85 Records

	Name	Set Type	Object Type	Created By	Creation Date
1	All Rep	Logical	Intellectual Entity	admin1	21/02/2018 23:46:29
2	Itemized with text file2	Itemized	Intellectual Entity	admin1	22/02/2018 00:19:12
3	Itemized with text file	Itemized	Intellectual Entity	admin1	22/02/2018 00:19:09
4	Itemized_set_for_regression_test26167	Itemized	Intellectual Entity	admin1	22/02/2018 02:41:43
5	logical_set_for_test_56882	Logical	Intellectual Entity	admin1	22/02/2018 02:42:34
6	MissingIES_SET_2e0	Logical	Intellectual Entity	admin1	21/02/2018 05:00:59
7	pagination set test	Logical	Intellectual Entity	admin1	21/02/2018 11:44:00
8	Pagination test-0	Logical	Intellectual Entity	admin1	21/02/2018 11:44:15
9	Pagination test-1	Logical	Intellectual Entity	admin1	21/02/2018 11:44:22
10	Pagination test-2	Logical	Intellectual Entity	admin1	21/02/2018 11:44:29

Exclude objects that have already been processed (only objects that have been updated since the last processing day will be included)

Back Cancel Next

Define Set for Process

8. Select the set to which you want to apply the process. Select the check box below the list if you want to apply the process only to new objects. When you are finished, click Next. The scheduling step of the wizard opens.
9. Select the type of schedule you want the process to follow from the left side of the page, then enter details on the main part of the page. When you are finished, click Next. The Review and Confirm step of the process wizard opens.
10. Review the information regarding the process you just created. If there are errors, click the Back link until you arrive on the page containing the error, and make any necessary changes. When the process is completed to your satisfaction, click the Submit button.
The process is set to run as you specified in this procedure.

Aborting a Process

To abort a running process, click Abort. Rosetta removes all waiting bulks of IEs from the process queue and the process ends after the current bulk of IEs is completed.



Publishing

About Publishing

The Publishing module in Rosetta accommodates the increasing demand for libraries to provide their users with integrated Web-based OPACs and instant retrieval of all available resources based on a user's search and access rights.

The Rosetta Publishing module integrates the following components in a hierarchical system, where the Publishing configuration is the highest-level entity that organizes the sub-entities, set and profile, as follows:

- Publishing configuration – a logical definition for a group of IEs (a set) bound to converters and targets using certain rules and having attributes such as name and status.
 - Publishing set – a group of conditions applied to IEs' DNX and descriptive metadata (indexed fields) that defines the IEs that will be processed
 - Publishing profile – the technical definitions for the Publishing module. These consist of two parts:
 - Converter – the type of conversion used on the IEs.
 - Target – the physical location where the IEs are published.

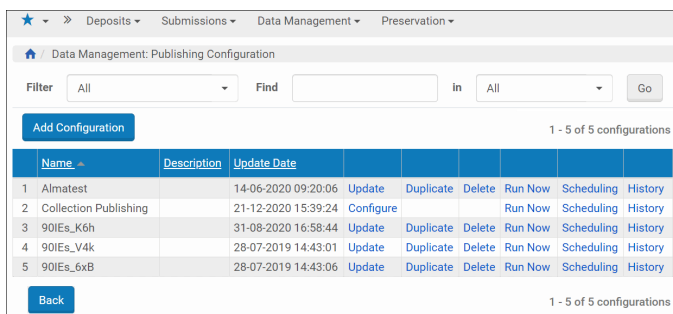
The converter and target make up the publishing profile, which, together with the publishing set, make up the publishing configuration.

Configuring Publishing

The Web pages and their associated tasks for configuring Rosetta publishing are described below.

Opening Page: Publishing Configuration List

You configure publishing at the institution level. Each configuration is managed independently. To begin configuring the Publishing module in Rosetta, follow the path: **Data Management > Manage Sets and Processes > Publishing Configuration**.



Name	Description	Update Date	Update	Duplicate	Delete	Run Now	Scheduling	History
1 Almatest		14-06-2020 09:20:06	Update	Duplicate	Delete	Run Now	Scheduling	History
2 Collection Publishing		21-12-2020 15:39:24	Configure			Run Now	Scheduling	History
3 90IEs_K6h		31-08-2020 16:58:44	Update	Duplicate	Delete	Run Now	Scheduling	History
4 90IEs_V4k		28-07-2019 14:43:01	Update	Duplicate	Delete	Run Now	Scheduling	History
5 90IEs_6xB		28-07-2019 14:43:06	Update	Duplicate	Delete	Run Now	Scheduling	History



Publishing Configuration List Page

You can configure the (institution-level) collection2DC.xsl configuration file, which converts collections to OAI format. To edit this file, click Configure in the Collection Publishing row. Only a single xsl configuration per institution is supported for collection publishing.

The following viewing options are available from the Publishing Configuration List page:

- Filtering the list by **Active**, **Inactive**, or **All**
- Searching the list using the **Find** field, entering a keyword, specifying search fields, and clicking **Go**
- Sorting the list by date, description (alpha), or name (alpha) by clicking the corresponding column header
- Actions that can be launched from this page are:
 - Adding a new configuration (**Add Configuration** button)
 - Updating an existing configuration (**Update** text link)
 - Duplicating an existing configuration (**Duplicate** text link)
 - Deleting a configuration (**Delete** text link)
 - Running a synchronization configuration (Run Now text link) – runs the task that checks if there is an update that needs to be published, and, if there is, publishes it.
 - Scheduling – schedule the synchronization job. Scheduling is done on the institution and configuration level.
 - History – displays the history of the configuration

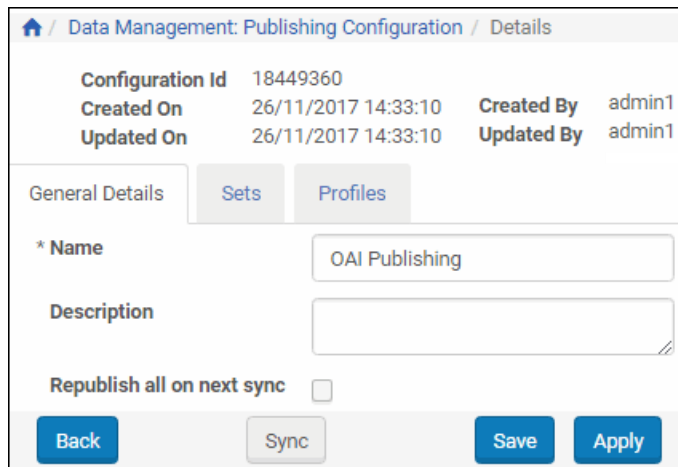
Adding/Updating Configurations

The Publishing Configuration Details page opens when you click the option to add, duplicate, or update from the Publishing Configuration List page.

The page contains three tabs and opens to the **General Details** tab.

General Details Tab

The General Details tab provides a name for the configuration and an optional description. The Name and Description values appear on the Publishing Configuration List page.



The screenshot shows the 'Data Management: Publishing Configuration / Details' page. It displays configuration details for Configuration Id 18449360, created and updated on 26/11/2017 14:33:10 by admin1. The 'General Details' tab is active, showing a form with a required field for Name (OAI Publishing), an optional Description field, and a checkbox for 'Republish all on next sync' which is currently unchecked. At the bottom, there are buttons for Back, Sync, Save, and Apply.

Publishing Configuration - General Details

Selecting the Republish check box republishes all records in the set whether or not they have been updated since the last publishing job. This option can be used if you have changed your job's profile details (for example, changes to an xsl



file). The check box remains checked until the next (successful) publishing job, after which it is automatically cleared.

Sets Tab

The **Sets** tab of the Publishing Configuration Details page allows you to create a set through a short wizard and add that set to a configuration.

For information on creating sets, see [Creating Sets](#).

When you have created at least one set, you can click the **Add Sets** button from the Publishing Sets page. In the figure in [Opening Page: Publishing Configuration List](#), only one set has been saved. Select it and click the **Add Selected** button to make this your set for the publishing configuration.

Ex Libris recommends that you limit your set selection and your profile selection to one each for each publishing configuration.

Profiles Tab

Profiles consist of converters and targets that process the sets created for publishing. Profile information is accessed by clicking the Profile tab from the Publishing Configuration List page (Data Management > Manage Sets and Processes > Publishing Configuration > [Add or Update Configuration] > Publishing Configuration Details).

Configuration Id 18449360
Created On 26/11/2017 14:33:10
Updated On 26/11/2017 14:33:10
Created By admin1
Updated By admin1

General Details Sets Profiles

Add Profile 1 - 1 of 1 profiles

Active	Name	Converter	Target	Update Date			
1	OAI Publishing	XSL-IEconverter	OAI-Publisher	26/11/2017 14:32:44	View	Duplicate	Delete

1 - 1 of 1 profiles

Back Sync Save Apply

Publishing Configuration - Profiles

Any existing profiles are listed. (None are shown in the figure above.)

To add a profile:

1. Click the Add Profile button.
Step 1 of the profile wizard opens.
2. Enter a name for the publishing profile in the **Name** field (required) and a description in the Description field (optional).
3. Select the Preservation Type from the right pane to move your selection to the left pane. You can select multiple preservation types.
4. The Status field defaults to Active. To change the profile to inactive, use the drop down selection.
5. Select a **Converter Type** and a **Target Type** from the drop-down fields (defaults are selected, as shown in the following figure)



Add Publishing Profile - Step 1

The converter and target types are required. For more information on converters, see [Converter Types](#). For information on targets, see [Target Types](#).

6. Use the check boxes (Include CMS and Include Access Rights) to include the relevant metadata in the profile.
7. Click Next.
Step 2 of the wizard opens. Selections and entries you made in Step 1 show in the header and body sections of the form. Any parameters required for converter and target types must be entered on this page.

Add Publishing Profile - Step 2

8. Enter any required parameters and click Save.
The Profile Page refreshes with the new profile listed under the Profiles tab.

Once you have created a profile, you can synchronize it with the general configuration, save it to the system, or apply it



(saving while remaining on the same page) to the profile.

Converter Types

Converters take the relevant information from the IE and prepare it for publication. Different converters take different fields from the IE (descriptive metadata, DNX, source metadata) and create different structures of XML files (OAI, DC, Xepicur).

The following plug-in converters are supported by Rosetta:

- CMS: Converts the metadata fields of the IE into fields published to Aleph.
- OAI: Takes the descriptive metadata fields of the IE and creates an XML in OAI-DC format.
- Xepicur: Converts the fields of the IE published to the DNB (German National Library).
- XSL: Allows libraries to use any kind of XSL file that converts the metadata fields of the IE (in DC format) to any other XML format.

Several XSL examples are located under `/exlibris/dps/d4_1/system.dir/xsl/`, and they will be overwritten by Rosetta service packs. If you customize these files, rename them or move them to an alternative location.

Target Types

A target is the physical location where the published metadata is sent as part of the publishing process. Targets are available for external systems to harvest.

The currently supported targets are:

- FigShare
- Handle
- OAI: According to the protocol OAI-PMH, the published metadata is stored in database tables and can be harvested by external systems.
For more information regarding OAI-PMH see <http://www.openarchives.org/pmh/>.
- NFS: Used when the published metadata should be stored in the file system to which the system that harvests the data has access.

The target types, NFS and OAI, are configured with the converters according to the specifications required by the converters.



Managing IEs

The section describes various activities that you can perform with IEs. It includes the following:

- [About Deleting, Restoring, and Purging an IE](#)
- [Deleting an IE from the Web Editor](#)
- [Deleting IEs in Bulk](#)
- [Recovering an IE from the Recycling Bin](#)
- [Purging an IE from the System](#)
- [Moving IEs](#)
- [Restoring IEs from the Permanent Repository](#)
- [Exporting IEs](#)

Deleting, Recovering, and Purging IEs

About Deleting, Recovering, and Purging an IE

When IEs are deleted from the system, they are sent to the recycling bin, and their status changes to Deleted. From the recycling bin, they can either be recovered or purged from the system.

IEs in the recycle bin retain their CMS information, and the Metadata Orphan Handler does not update the CMS system until the IEs are purged.

When an IE has been purged, only provenance events remain on record in the system.

Deleting and restoring can be performed by a user with the role of Editor - Full. Purging an IE from the system can only be performed by a user with the role of Data Manager.

Deleting and Purging an IE are assigned to different roles in order to avoid accidental and permanent deletion of an IE.

The following table describes user actions and system behavior related to deleting, restoring, and purging IEs.

Deleting, Restoring, and Purging IEs

User Action	System Actions	Resulting IE Status
Delete IE(s) (from the Web Editor or using a system process)	Changes the IE status to Deleted without any other actions	Deleted – cannot be viewed, edited, published or searched for (but can be recovered).
Recover IE (from the recycling bin)	Changes the IE status to In Permanent.	In Permanent
Purge IE permanently (from the recycling)	Deletes the streams and the operational data, all the metadata from the METS file except the provenance	Deleted – cannot be viewed, edited, published, or searched



User Action

System Actions

Resulting IE Status

bin)

events that remain for audit and logging.

for (and cannot be recovered)

Deleting an IE from the Web Editor

When a user deletes an IE, the IE becomes unavailable for standard actions in the Web Editor.
To delete an IE:

1. Perform a search on the database (through Data Management > Search for Objects, for example) to find the IE you want to delete.
2. Click Editor in the row of the object you want to delete.
The object opens in the Web Editor:

Intellectual Entity PID IE1090 Created on 27/03/2018 20:18:54 Created by rosettaTest1
Committed on 27/03/2018 20:20:18 Committed by rosettaTest1 SIP ID 31
Version 1

IE (IE1090)
Preservation Master Revision 1 (REP1091)
File (FL1092,32Kb)

Object Summary Metadata Services Collections Versions

View Object

PID	IE1090
SIP ID	31
Created on	27/03/2018 20:18:54
Created by	rosettaTest1
Updated on	27/03/2018 20:18:55
Updated by	rosettaTest1
Entity Type	-
Number of Reprs	1
Status	ACTIVE

Back Actions: Delete IE GO

Deleting an IE

3. In the bottom pane, click the down arrow of the Actions drop-down field and click the Lock IE option.
4. In the bottom pane, click the down arrow of the Actions drop-down field and click the Delete IE option.
The Delete IE option does not appear in the drop-down list if you have not locked the object. All objects must be locked before action can be taken on them. (This prevents two users from interfering with each other's work.) If you see an option to lock the object, select that and click the GO button. When the page refreshes, you should see several options in the drop-down list, including Delete IE.
5. Click the GO button.
The Deletion Reason and Note Page opens:

Data Management: Search for Objects / Details

You have requested to delete an IE from the permanent repository, please enter a reason and a note (optional)

* Reason Copyrights Violation

Optional Note

Cancel Save

Deletion Reason and Note Page

6. Use the drop-down menu to select a reason for the deletion.
7. Enter a note in the text field if you want more information to be recorded with this action.



- Click the Save button to complete the deletion of the IE.

Deleting IEs in Bulk

The bulk delete process deletes IEs by removing them from the permanent repository to the recycle bin area. Users schedule the process using two input parameters:

- Task chain – created using the task chain UI.
- Set of IEs – created using the set management UI. To create a set of IEs (an itemized set), see [Creating an Itemized Set](#) of this guide.

To create a process that deletes multiple IEs:

- From the Management Home page, click Data Management > Processes. The Process List page opens to existing processes.

Name	IC	Task Chain Name	Scheduling	Status
4014473	ADD to the Randomly Collection	ADD to collection (by name)	Enrichment Move to Permanent, Maintenance, Metadata - (Full)	Not Scheduled
2890220	ADD to PPS	ADD to collection (by name)	Enrichment Move to Permanent, Maintenance, Metadata - (Full)	Not Scheduled
1107749	Assign to Random	Assign to	Enrichment Move to Permanent, Maintenance, Metadata - (Full)	Not Scheduled
1480501	Assign of PPS to a PPS	Assign to collection (by name)	Enrichment Move to Permanent, Maintenance, Metadata - (Full)	Not Scheduled
1544056	IC Collection	ADD to collection (by name)	Enrichment Move to Permanent, Maintenance, Metadata - (Full)	Not Scheduled

Process List Page

- Click the Add Process button. The list of task chains opens. This is the first step of a 5-step wizard that guides you through the creation of the process.
- Select the Delete IE task chain and click the Next button. The Complete Parameters (step 2) of the wizard opens.

General Info

* Process Name:

Priority: Normal

Rollback IE - Rollback changes to an IE

No Parameters

Add Provenance Event for Delete IE - Add provenance event for deleting IE

* Reason: Copyrights Violation

Optional Note:

Delete IE - Delete IE and move it to the recycle bin

Delete Permanently:

Email Notification

Send email?: No

Buttons: Back, Cancel, Next

Complete Parameters - Step 2



4. Enter a process name and select a Priority.
 5. Select a reason for deleting the IE set.
 6. Enter an optional note to be retained as provenance material even if the IE set is purged from the system.
 7. To purge the IE set immediately from the system, select the Delete Permanently check box. (This is equivalent to purging the IEs in the recycle bin.)
 8. Select an Email notification option.
 9. Click the Next button.
- The Define Set step (3) of the wizard opens.

	Name	Set Type	Object Type	Created By	Creation Date
1	Missing[ES_SET_J3]	Logical	Intellectual Entity	admin1	29/04/2018 20:34:02
2	SIP 0 Itemized set1525021106627	Itemized	Intellectual Entity	admin1	29/04/2018 19:58:32
3	SIP 239 Itemized set1525029203162	Itemized	Intellectual Entity	admin1	29/04/2018 22:13:30
4	SIP 81 Itemized setd5E	Itemized	Intellectual Entity	admin1	29/04/2018 20:31:35
5	SIP 80 Itemized setT4g	Itemized	Intellectual Entity	admin1	29/04/2018 20:30:20
6	SIP 80 logical set1525023006646	Logical	Intellectual Entity	admin1	29/04/2018 20:30:12
7	SIP 81 logical set1525023081335	Logical	Intellectual Entity	admin1	29/04/2018 20:31:26
8	SIP 186 logical set1525027854735	Logical	Intellectual Entity	admin1	29/04/2018 21:50:59

Exclude objects that have already been processed (only objects that have been updated since the last processing day will be included)

Back Cancel Next

Define Set - Step 3

10. Select the itemized set you created for this process and click Next.

Select the Exclude... check box to avoid objects that have already been processed.

The scheduling step (4) opens.

No Scheduling

Once
Daily
Weekly
Monthly
Advanced

Back Cancel Next

Scheduling - Step 4

11. Select the interval in the left column of the page and enter values in the right column as they display. To run the process right away, leave the default value, No Scheduling. Then, from the process list, click Run Now for your process.
12. Click Next.

The Review and Confirm step (5) opens.



Home / Data Management: Processes / Details

1 2 3 4 5

General Information

Process Name: General Process
Priority: Normal

Parameters For Tasks

Reason: CopyrightsViolation

Set Information

Set Id: 57501
Name: MissingIES_SET_J3J

Scheduling

Not Scheduled: Not Scheduled

Back Cancel Submit

Review and Confirm - Step 5

- Review the information. To change any information or parameters, use the Back button(s) to take you to the necessary page.
- When the process is complete, click the Submit button.

The system adds your process to the Process List page and carries out the process to your specifications.

Recovering an IE from the Recycling Bin

IEs that have been deleted through the Web Editor can be recovered from the Recycling Bin. Retrieving an IE from the Recycling Bin restores it to its previous location in the database.

If you have moved the IE from one institution to another, the restoration will move it back to the earlier institution. To recover an IE from the Recycling Bin:

- From the Home page, select Data Management > Advanced Tools > Recycle Bin. The Recycle Bin page opens. Any IEs that have been deleted but not purged from the system are listed with identification information and information on their deletion. Items can be sorted by clicking the column headers you want to sort by and filtered by selecting an option from the Filter drop-down list

Data Management: Recycle Bin

Filter: All [input type="text"] [input type="button" value="Go"]

1 - 10 of 91 records

	Title	IID	CMS ID	Deleted By	Delete Date	Status				
1	Northwestern Book Example 2	IE10620		Bulk Delete Process (1...	23/08/2019 16:36:30	Deleted	view METS	Recover	Delete Permanently	View Reason and Note
2	Famous Paintings	IE23318		Bulk Delete Process (1...	23/08/2019 16:28:19	Deleted	view METS	Recover	Delete Permanently	View Reason and Note
3	Pipa	IE16278		Bulk Delete Process (1...	23/08/2019 16:28:11	Deleted	view METS	Recover	Delete Permanently	View Reason and Note
4	Maud ARMAUD test deposit	IE53206		admin1	24/07/2019 14:36:56	Deleted	view METS	Recover	Delete Permanently	View Reason and Note
5	Northwestern Book Example	IE8394		Bulk Delete Process (1...	23/07/2019 08:24:39	Deleted	view METS	Recover	Delete Permanently	View Reason and Note
6	Emimem - 8 mile	IE51642		Bulk Delete Process (1...	23/07/2019 08:06:49	Deleted	view METS	Recover	Delete Permanently	View Reason and Note
7	EMPN0504	IE51098		Bulk Delete Process (1...	23/07/2019 08:06:47	Deleted	view METS	Recover	Delete Permanently	View Reason and Note
8	BLK	IE50238		Bulk Delete Process (1...	23/07/2019 08:06:44	Deleted	view METS	Recover	Delete Permanently	View Reason and Note
9	PDF (1 of 5000)	IE93784		Bulk Delete Process (1...	23/07/2019 08:06:40	Deleted	view METS	Recover	Delete Permanently	View Reason and Note
10	PDF (1 of 5000)	IE9552		Bulk Delete Process (1...	23/07/2019 08:06:40	Deleted	view METS	Recover	Delete Permanently	View Reason and Note

1 - 10 of 91 records

Back Action: Recover Submit

Recycle Bin Page

Action items are also listed in each IE row:

- view METS displays the METS XML for the IE
- Recover restores the IE from the Recycle Bin to the repository
- Delete Permanently deletes the IE permanently



- Retry attempts to delete an IE after a previous attempt failed. This option only appears for IEs with status Failed.
 - More opens a third link, View Reason and Note, which, when clicked, displays the PID, Delete Date, and the reason and note explaining why the IE was deleted.
2. To restore a single IE, click Recover on the corresponding row. To restore more than one IE, select the check box to the left of the title for each IE you want to restore, then select Recover from the Action field and click the Submit button
The system restores the IE or IEs you selected and refreshes the page with a message that it successfully restored the IE. The items that were restored no longer appear on the Recycle Bin page.

Purging an IE from the System

Users with the role of Repository Manager can permanently delete IEs from the system.

To purge an IE from the system:

1. Log on in the capacity of a Data Manager.
2. Open the Recycle Bin page by clicking through Home > Data Management > Delete From Permanent/Recycle Bin.
3. Do one of the following:
 - Click the check boxes beside the names of the IEs that you want to delete permanently, from the Action drop-down list select Delete Permanently, and click Submit.
 - Select Delete Permanently in the row of the IEs that you want to delete.
To delete all of the IEs in the Recycle Bin, select Delete ALL Permanently from the Action drop-down list and click Submit.

If the deletion is successful, the system sends a confirmation message to the user, permanently deletes the IEs, and saves provenance information.

If an IE fails to be deleted, it is given the status Failed. You can retry to delete failed IEs by clicking Retry in the row of a failed IE, or select Delete ALL Permanently from the Action drop-down list and click Submit.

Moving IEs

In the course of managing a consortium with several institutional and departmental members, libraries may want to move some or all of the IEs from one location to another. A task chain accessed from the Data Management module of Rosetta provides the steps for carrying out the transfer of IEs.

The following rules and conditions apply when transferring IEs:

- The initiating member needs to own the IEs being moved (but does not need permissions for the target institution)
- Moving IEs between institutions/departments generates a provenance event.
- If an IE is assigned to a collection, and the institution changes when the IE is moved, the collection will be unassigned.
- If an IE's source and target departments are identical, the IE will be ignored by the task.

To move IEs:

1. From the Process List page (Data Management > Manage Sets and Processes > Process List), click the Add Process button. The Choose Task Chain page opens



Name	Scope	Level	Status	Status Date
(Re)Create Derivative Copies - Audio	Maintenance	INTELLECTUAL_ENTITY	Active	14/09/2010 14:33:04
(Re)Create Derivative Copies - Images	Maintenance	INTELLECTUAL_ENTITY	Active	14/09/2010 14:33:04
(Re)Create Derivative Copies - Mixed Material	Maintenance	INTELLECTUAL_ENTITY	Active	14/09/2010 14:33:04
(Re)Create Derivative Copies - Text	Maintenance	INTELLECTUAL_ENTITY	Active	14/09/2010 14:33:04
(Re)Create Derivative Copies - Video	Maintenance	INTELLECTUAL_ENTITY	Active	14/09/2010 14:33:04
Access right change	Validation Stack, Enrichment, Move to Permanent, Maintenance, Workbench, Webeditor	INTELLECTUAL_ENTITY	Active	21/05/2012 07:30:00
Add File PI	Maintenance, Webeditor - Permanent	FILE	Active	22/05/2018 07:19:02
Add PI	Maintenance, Webeditor - Permanent	FILE	Active	22/05/2018 09:59:55
Add Representation Enrichment	Enrichment, Maintenance, Webeditor - Permanent	INTELLECTUAL_ENTITY	Active	14/09/2010 14:33:21
Add to collection by DC field	Enrichment, Move to Permanent, Maintenance, Workbench, Webeditor - Permanent	INTELLECTUAL_ENTITY	Active	10/05/2012 14:41:57
Add to collection (by name)	Enrichment, Move to Permanent, Maintenance, Webeditor - Staging, Webeditor - Permanent	INTELLECTUAL_ENTITY	Active	10/05/2012 14:41:44
Assign Access Rights Policy	Enrichment, Maintenance, Workbench, Webeditor - Staging, Webeditor - Permanent	INTELLECTUAL_ENTITY	Active	14/09/2010 14:33:04
Assign Collection by Name	Enrichment, Move to Permanent, Maintenance, Workbench, Webeditor - Permanent	INTELLECTUAL_ENTITY	Active	06/05/2012 13:49:22
Assign PI	Maintenance, Webeditor - Permanent	INTELLECTUAL_ENTITY	Active	08/10/2012 12:48:51
Change entities	Maintenance, Webeditor - Permanent	INTELLECTUAL_ENTITY	Active	10/01/2016 09:57:43

Choose Task Chain Page

- Find the task chain named Move IE to Another Institution/Department and select it. Then click Next at the bottom of the page.
The Complete Parameters page opens for the task chain you selected

Data Management: Processes / Details

General Info

* Process Name:

Priority:

MoveTask - Move IE to Another Institution/Department

* Institution to Move IE to:

Email Notification

Send email?:

Complete Parameters Page of Move IE Wizard

- Provide a name for the new process in the Process Name field. This will identify the process for anyone who wants to use it. The name appears on the Process List page and is searchable using the quick-find box on that page.
- From the Move IE to drop-down list, select the institution and department to which you want to move the objects.
- Click the Next button.
The Define Set page of the wizard opens. All available sets for this wizard are listed on this page

Data Management: Processes / Details

1 - 10 of 125 Records

Name	Set Type	Object Type	Created By	Creation Date
<input checked="" type="radio"/> 6.1 qa test	Itemized	Intellectual Entity	admin1	16/06/2019 08:38:09
<input type="radio"/> AAA one IE set	Itemized	Intellectual Entity	admin1	29/07/2019 13:50:59
<input type="radio"/> abc	Logical	Intellectual Entity	staffuser	26/11/2013 08:56:54
<input type="radio"/> Add Collections	Logical	Intellectual Entity	admin1	19/07/2012 12:00:01
<input type="radio"/> add Landscape	Logical	Intellectual Entity	staffuser	26/07/2013 10:28:12
<input type="radio"/> aimage	Logical	Intellectual Entity	staffuser	08/11/2013 02:49:10
<input type="radio"/> All IEs deposited during 2013	Logical	Intellectual Entity	admin1	21/05/2013 08:52:05
<input type="radio"/> All	Logical	Intellectual Entity	admin1	16/11/2016 00:22:38
<input type="radio"/> All Files	Logical	Intellectual Entity	admin1	06/08/2013 21:40:07
<input type="radio"/> All IEs	Logical	Intellectual Entity	admin1	17/01/2011 17:23:45

Exclude objects that have already been processed (only objects that have been updated since the last processing day will be included)

Define Set Step of Wizard



- Select the set containing the IEs you want to transfer, then click the Next button.
The Scheduling step of the wizard opens. The schedule defaults to No Scheduling. Also available are once, daily, weekly, monthly, and an advanced option that allows you to enter a firing schedule using a Cron Trigger (with samples provided)

Process Scheduling - Weekly

- Enter a schedule for the process and click Next.
The system returns a summary of the process on the Review and Confirm page

Summary of Process Entries

- Review the information on step 5 of the wizard. If you need to make changes, use the < Back link until you reach the page where you want to make changes. To cancel the process, click the Cancel button. To submit the process to the system, click the Submit button.
If you submitted the process, Rosetta runs it or queues it for running. The Process List page opens with the new process appearing there



ID	Name	Task Chain Name	Task Chain Group	Scheduling	Status	Start Date	End Date	History	Update Parameters	More Actions*
19220072	Move Es	View Es to Archive from Archive Department	Maintenance	Every 15 days at 09:55:00	Run Now	16/11/2019 09:51:23		History	Update Parameters	More Actions*
19217881	test EDS-1809	Change Local Access Rights	Maintenance	Not Scheduled	Run Now	17/11/2019 10:55:53		History	Update Parameters	More Actions*
19133033	FullText Create Derivative Copy Representation	Create Derivative Copy Representation	Maintenance	Not Scheduled	Run Now	12/06/2019 23:20:06		History	Update Parameters	More Actions*
19133029	FullText Create Derivative Copy Representation	Create Derivative Copy Representation	Maintenance	Not Scheduled	Run Now	12/06/2019 23:15:28		History	Update Parameters	More Actions*
19133030	FullText Create Derivative Copy Representation	Create Derivative Copy Representation	Maintenance	Not Scheduled	Run Now	12/06/2019 23:11:22		History	Update Parameters	More Actions*
19134705	FullText Create Derivative Copy Representation	Create Derivative Copy Representation	Maintenance	Not Scheduled	Run Now	12/08/2019 22:01:51		History	Update Parameters	More Actions*

New Entry in Process List

Restoring IEs from the Permanent Repository

Library staff who want to view previous versions of an IE and possibly restore those versions can do so through the Web Editor. A tab on the Web Editor called Versions displays a list of current and older versions of an IE. Staff with sufficient authorization can retrieve an older version of an IE from the permanent repository and store it as the new and latest version of itself.

Rosetta uses the IE's METS file, which consists of the preserved representation only. When the restoration is complete, the IE in the operational repository match the version in the permanent repository.

- Although the IE to be overridden will take on the content and metadata of the restored object, access copies and access rights exceptions attached to the IE will migrate with the IE being restored and remain in the database.
- If a full-text file is deleted (directly or if the associated content file was deleted) the full-text cannot be restored. The extracted full-text file is considered auxiliary to the content file and so is not part of the information preserved in the version history in Rosetta.

To view or restore an IE from the permanent repository:

1. Find the object you want to restore by searching the repository for an object or for metadata (Home > Data Management > Search for Objects|Search for Metadata).
When you find the object, the Web Editor displays its details in a tabbed pane.
2. Click the Versions tab in the pane.
Information on the versions of this IE display under the tab

Intellectual Entity PID: IE1114
Created on: 07/10/2010 09:23:53
Created by: admin1
Committed on: 06/05/2015 14:13:15
Committed by: SYSTEM
SIP ID: 9
Version: 7

Object Summary | Metadata | Services | Collections | Versions

Title	Version	Commit Date	Created By	Events	View	METS	Download
books	7	06/05/2015 14:13:15	admin1	Events	View	METS	Download
books	6	19/06/2013 10:47:40	admin1	Events	View	METS	Download
books	5	08/11/2012 12:54:15	admin1	Events	View	METS	Download
books	4	08/11/2012 12:52:40	admin1	Events	View	METS	Download
books	3	21/05/2012 07:45:41	admin1	Events	View	METS	Download
books	2	10/01/2012 05:26:46	admin1	Events	View	METS	Download
books	1	12/04/2011 18:39:57	admin1	Events	View	METS	Download

Back Actions: IE Export GO

Version Tab of the Web Editor

3. Find the version you want to view or restore and click the text link corresponding to that IE.
If you are viewing, the METS information will open in a separate window. If you are restoring, Rosetta will open a confirmation page.



4. To restore, click the Confirm button.

The system restores the IE and refreshes the Versions tab with messages regarding the IE status and instructions for verification. The Restore text link is no longer available for that version you restored

Currently Being Rolled Back By: Me.
 The IE is being restored. All IE records including CMS records are being restored, please verify correctness.
 Please note: Derivative Copies are not restored automatically, please verify correctness and handle manually.

Title	Version	Commit Date	Created By	Events	View	METS	Download
Northwestern Book Example 2	5	21/01/2018 16:00:06	admin1				
Northwestern Book Example 2	5	16/11/2017 11:24:08	admin1	Events	View	METS	Download
Northwestern Book Example 2	4	08/11/2013 03:00:21	admin1	Events	View	METS	Download
Northwestern Book Example 2	3	08/11/2012 02:11:59	admin1	Events	View	METS	Download
Northwestern Book Example 2	2	28/07/2011 15:27:36	admin1	Events	View	METS	Download
Northwestern Book Example 2	1	11/09/2011 20:37:59	admin1	Events	View	METS	Download

Versions Page After Restoring IE

Exporting IEs

You can export IE data from Rosetta to be used by other systems. To export IEs:

1. Search for an IE (see [Searching in Rosetta](#) and [Searching for SIPs](#)).
2. Select Export for the IE that you want to export. The following appears:

Process Name: FastTrack (Export Intellectual Entities, IE1000)
 Priority: High

Export IE - Export IEs and associated files

Preservation Type filter: 0 items selected **Remove all** **Add all**

- Preservation Master
- Modified Master
- Derivative Copy
- Second Modified Master
- Test Type
- Test Type 2

Include CMS in Export:

Include Access Rights in Export:

Representation Packaging: tar

Export Location: NFS SFTP

Export Path: /exlibris/Rozimounts/OPERATIONAL_SHARED/staff_work_area/INSD0/admin1/export/ies

Group Name:

File Permissions:

Email Notification

Send email?:

Cancel **Submit**

Exporting IEs

3. Fill in the fields according to the following table:

Field	Description
Priority	Select the priority of the export process compared to other process running in the system.



Field	Description
Preservation Type filter	Select a preservation type to limit the export to IEs with the selected preservation type.
Include CMS In Export	Select to include the CMS information of the IE in the export.
Include Access Rights In Export	Select to include the access rights information of the IE in the export.
Representation Packaging	Select tar to package the representation as a tar file.
Export Location	Select NFS (Network File System) to export the IE to a local server or SFTP to export the IE to an SFTP server.
Export Path	(For NFS only) Enter the path of the location to which you want the IE exported.
Group Name	(For NFS only) Specify the Linux file group name for the exported files. The default value is defined under the general parameter <code>export_ie_default_group_name</code> (optional).
File Permissions	(For NFS only) Specify the octal/symbolic Linux file permissions for the exported files. Directories have additional execute permissions for group and owner. The default value is defined under the general parameter <code>export_ie_default_permissions</code> (optional).
Server	(For SFTP only) Select the server to use to export the IE.
Port	(For SFTP only) Select the port to use to export the IE.
Sub-directory	(For SFTP only) The subdirectory to which you want the IE exported.
Authentication Method	(For SFTP only) Select either Password or Key.
User Name	(For SFTP only) The user name of the SFTP server.
Password	(For SFTP - Password only) The password of the SFTP server.
Identity File Path	(For SFTP - Key only) The authentication identity file path on the local server for accessing the SFTP server.

4. Click Submit.

The IE is exported.



Fixity, Provenance, and Storage

Fixity in Rosetta with an External Storage Layer

Fixity checks occur as part of validating files as they are deposited, ingested, or otherwise altered within Rosetta. If an institution using Rosetta wants to store files in one or more storage locations outside of the Rosetta repository, fixity checks and events from this external storage layer can be integrated into Rosetta records.

As part of this process, provenance events are performed in Rosetta before an object or IE is returned to the external storage layer. Rosetta performs its part of the equation through its Data Management module and the use of an API. As part of maintaining the preserved file copies, a fixity check is performed on each of the copies wherever they are stored. In order to record all the information about these checks in Rosetta, the library must run an API that updates Rosetta after a fixity check. This allows reports to be generated in Rosetta and provide the fixity status for all files. The process includes the addition of an event that can be either a statistical event (not provenance) or a provenance event.

A provenance event is recorded in the IE METS file, and it requires a new version of the METS file to be written.

The provenance event functions as follows:

- The event itself is written to the database whenever it is generated, whether it succeeds or fails.
- The event is written to the DNX as provenance when the check result is different from the current status:
 - first time it runs (success/failure)
 - success after failure
 - failure after success

In addition, this event does the following:

- Captures the information about a fixity check that was performed in the storage layer on any of the file copies
- Is added to Rosetta by an API
- When triggered externally, is written to the database as if it had been triggered internally

Managing Fixity Reports

Fixity reports are set up as Event Reports in the Data Management section of the Management module:



Name	Modification Date	Description	Creation Date	Open Report	Edit	View	More Actions
1 Fixity Report Rivka	03/10/2019	aa	24/04/2014	Open Report	Edit	View	More Actions
2 Fixity Report Test	03/10/2019	bb	24/04/2014	Open Report	Edit	View	More Actions
3 te	07/10/2019	-	07/10/2019	Edit	View	Delete	

Fixity Reports Page

Access the page by following the path Home > Data Management > Advanced Tools > Fixity Reports. From this page you can

- Add a new report
- View, edit, or delete an existing report
- Open or generate an existing report

To add a new report:

1. From the Fixity Reports page (Home > Data Management > Advanced Tools > Fixity Reports), click the Add Event Report button.
The Add Event Report page opens.

2. Enter values in the fields as described in the following table:

Event Report Page Fields

Field	Description
Name	Provide a name for the report to appear on the Fixity Reports page.
Description	Describe the report (not required).
Time Period	Specify the number of days, weeks, months, or years for the report to cover.
Number of copies and fixity events per copy	To select a specific number of copies and/or fixity events per copy to capture in the report, select the check boxes and specify the numbers in the fields.

3. To create or add a set to be included in the report, click the corresponding button and specify a new set (Create Set button) or select a set that has already been defined (Add Set button).
To create a new set with search conditions, see [Creating a Logical Set](#).

When you have created a new set or added an existing one to the event, the Event Report Details page refreshes with the selected set shown beside an Unlink set option:



* Name: IEs fixity report
 Description:
 * Time Period: days
 Files should have: file copies
 Files should have: fixity events (per copy)
 * Set Name: ALL IEs Unlink set
 Cancel Save

Set Selection for Event Report

4. To change the set, click Unlink set and repeat from the beginning of the previous step in this procedure. To keep the set, select Apply. To keep the set and continue with the procedure, click Save. Rosetta returns you to the Fixity Reports page, where the new event report appears in the list of fixity reports.

To view, edit, open, delete, and generate a fixity report:

1. From the Fixity Reports page (Home > Data Management > Advanced Tools > Fixity Reports), the following row actions are available:
 - Open Report to open the report. Click Export Fixity Report to Excel to download an excel of the report.
 - Delete to delete the report (then click Confirm to continue the deletion)
 - View to view the report details (click Back to return to this page)
 - Edit to make changes to the report details. Click Generate Report to generate the report.
2. Click Save to save changes or Cancel to return to the report list page without saving changes.



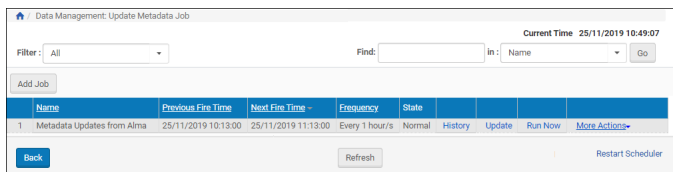
Metadata Update Jobs

About Metadata Update Jobs

Metadata update jobs are used to update metadata for existing IEs.

Managing Metadata Update Jobs

The Manage Scheduled Jobs page enables Data Managers to schedule metadata Update jobs. To access this page, follow the Rosetta drop-down menu path: Data Manager > Manage Sets and Processes > Update Metadata Job. The Manage Scheduled Jobs page opens to existing metadata update jobs:



Name	Previous Fire Time	Next Fire Time	Frequency	State	History	Update	Run Now	More Actions
Metadata Updates from Alma	25/11/2019 10:13:00	25/11/2019 11:13:00	Every 1 hour/s	Normal				

Manage Scheduled Jobs (Metadata Update Jobs List)

This page enables Data Managers to monitor the status of each metadata update job and perform the following tasks:

- Add a new job – For more information, see [Adding a Metadata Update Job](#).
- View a job's details – Click the View link next to the job you want to view.
- Modify a job – For more information, see [Modifying a Metadata Update Job](#).
- Execute a job – Click the Run Now link to run a job manually.

In addition, you can cancel a job. For more information, see [Cancelling a Metadata Update Job](#).

Adding a Metadata Update Job

This task allows Data Managers to create a new metadata update job.

To add a Metadata Update job:

1. Click the Add job button on the Manage Scheduled Jobs page.
The Job Details page opens.



Job Details (Metadata Update Job)

2. Enter a name for the metadata update job in the Name field.
3. Select the interval at which to execute the job: No Scheduling, Hourly, Daily, Weekly, Monthly, and Advanced.
4. To configure hourly, daily, weekly, and monthly intervals:
 - a. Use the following table to configure the common interval fields:

Common Interval Fields

Section	Field	Description
Start At	Time	Select the hour and minutes from the drop-down fields to specify the time at which to run the job.
	Date	Use the calendar tool or select the month, day, and year from the drop-down fields to select the date at which to start running the job.
Repeat	Indefinitely	Select this option to run the job indefinitely.
	Until	Select the month, day, and year from the drop-down fields to specify the date at which to stop running the job. After this date, the state of the job will change from Normal to Not Running.

- b. Use the following table to configure the interval-specific fields:



Interval-Specific Fields

Type of Interval	Perform this task:	Description
Hourly	Every	Select the hourly interval from the Hours drop-down field.
Weekly	Week days	Select which days of the week to run this job.
Monthly	Monthly At	Select the day of the month to run this job.

For information on how to configure advanced intervals, see [Configuring Advanced Job Schedules](#).

5. Complete the required fields in the Job Parameters pane.
6. From the Send Email? drop-down list, you have the following options:
 - No (default)
 - Yes (if there was work)
 - On failure only
The email contains a report/log file for the job.
7. Click the Apply button to add the job to the list of metadata update jobs.

Modifying a Metadata Update Job

This task allows Data Managers to modify the details for an existing metadata update job.

To modify a Metadata Update job:

1. On the Manage Scheduled Jobs page, click the Edit link next to the job that you want to modify.
2. Select the interval at which to execute the job: No Scheduling, Hourly, Daily, Weekly, Monthly, and Advanced.
3. To configure hourly, daily, weekly, and monthly intervals:
 - a. Use the following table to configure the common interval fields:

Common Interval Fields

Section	Field	Description
Start At	Time	Select the hour and minutes from the drop-down fields to specify the time at which to run the job.
	Date	Use the calendar tool or select the month, day, and year from the drop-down fields to select the date at which to start running the job.
Repeat	Indefinitely	Select this option to run the job indefinitely.
	Until	Select the month, day, and year from the drop-down fields to specify the date at which to stop running the job. After this date, the state of the job will change from Normal to Not Running.

- b. Use the following table to configure the interval-specific fields:



Interval-Specific Fields

Type of Interval	Perform this task:	Description
Hourly	Every	Select the hourly interval from the Hours drop-down field.
Weekly	Week days	Select which days of the week to run this job.
Monthly	Monthly At	Select the day of the month to run this job.

For information on how to configure advanced intervals, see [Configuring Advanced Job Schedules](#).

4. Complete the required fields in the Job Parameters pane.
5. Click the Apply button to add the job to the list of metadata update jobs.

Cancelling a Metadata Update Job

Cancelling a job allows the Data Manager to postpone the execution of job indefinitely without deleting it from the system.

The Unschedule option will not be available when the state of the job is Not Running.

To cancel a Metadata Update job:

1. On the Manage Scheduled Jobs page, click the Edit link next to the job that you want to modify.
The Job Details page opens.
2. Click the Unschedule button.
The state of the job should change to Not Running.



Collections

Collections in Rosetta

Collections in Rosetta enable users to aggregate IEs so that they can be preserved according to their original hierarchy. Editors (Typical and Full) and Data Managers (Typical and Full) have access to collections from the Data Management > Collection Management menu. These authorized users can create, update, and delete collections under the correct circumstances.

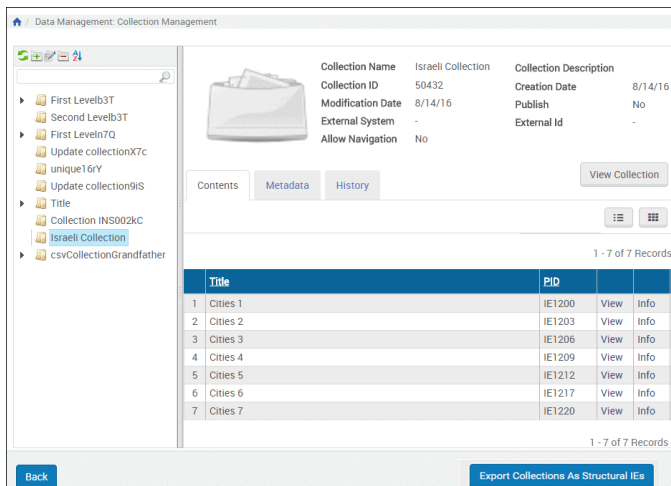
Collections contain:

- one or more associated IEs (and the IEs contain the associated Collection ID in their records)
- a unique path (including collection/sub-collection)
- metadata in DC format—stored as shared metadata in the database and in the permanent repository
- optional source metadata in any format other than DC (such as EAD or MARC)
- optional sub-collections

Collections are not sets. Process automation tasks cannot work directly with collections. In order for Process automation tasks to work with collections, sets need to be created with the collection name as a criterion for the search query.

Managing Collections

Collections can be managed from the Collections Management page:



Title	PID	View	Info
1 Cities 1	IE1200	View	Info
2 Cities 2	IE1203	View	Info
3 Cities 3	IE1206	View	Info
4 Cities 4	IE1209	View	Info
5 Cities 5	IE1212	View	Info
6 Cities 6	IE1217	View	Info
7 Cities 7	IE1220	View	Info

Collections Management

If you add collections with the API and want to see the results in Rosetta (for testing purposes, for example) you must



refresh the collection tree by reopening the collection UI.

The Collections Management page includes a hierarchical navigation bar (left column of the page) and a main window with the Contents, Metadata, and History tabs.

The Contents tab displays the contents of the collection in terms of its IEs. IEs can be viewed in a list format or as thumbnails.

The Metadata tab (see [Collections Management Page, Metadata Tab](#)) provides an interface for users to edit the collection's metadata. Users can edit DC records online or upload metadata from external XML file. Import formats can be either DC or source metadata in any format (such as MARC or EAD).

Name	Type	Mid	
Descriptive	DC	1102	Edit
Collection	mets	1103	View

Collections Management Page, Metadata Tab

In the permanent repository, the descriptive metadata of the collection is stored in a METS XML document along with some control information.

The History tab displays a list of the actions performed on the collection:

Event type	Description	Date
1 IE has been added to collection	IE1206 has been added to collection:Israeli Collection (collection id:50432)	14/08/2016 21:29:08
2 IE has been added to collection	IE1220 has been added to collection:Israeli Collection (collection id:50432)	14/08/2016 21:29:08
3 IE has been added to collection	IE1212 has been added to collection:Israeli Collection (collection id:50432)	14/08/2016 21:29:08
4 IE has been added to collection	IE1200 has been added to collection:Israeli Collection (collection id:50432)	14/08/2016 21:29:08
5 IE has been added to collection	IE1217 has been added to collection:Israeli Collection (collection id:50432)	14/08/2016 21:29:08
6 IE has been added to collection	IE1203 has been added to collection:Israeli Collection (collection id:50432)	14/08/2016 21:29:08
7 IE has been added to collection	IE1209 has been added to collection:Israeli Collection (collection id:50432)	14/08/2016 21:29:08

History Tab

Adding a New Collection

Adding a new collection can be accomplished in two ways:

- Manually, through the UI
- Automatically, when associating IEs with a collection. (See [Associating IEs with Collections](#))

To add a collection manually:

First determine where, in the existing hierarchy, you want to position your collection. In the example below, [Adding a New Collection](#), the user wants to create a collection that is a sub-collection of the existing Modern collection.

1. To create a sub-collection of an existing collection, click that collection in the collection hierarchy. The system highlights the collection you clicked.
2. Click the green button with the plus sign. A new collection form opens in a light box. The Selected parent field provides you the option of creating a first-level collection or a sub-collection of the parent collection you selected in step 1.



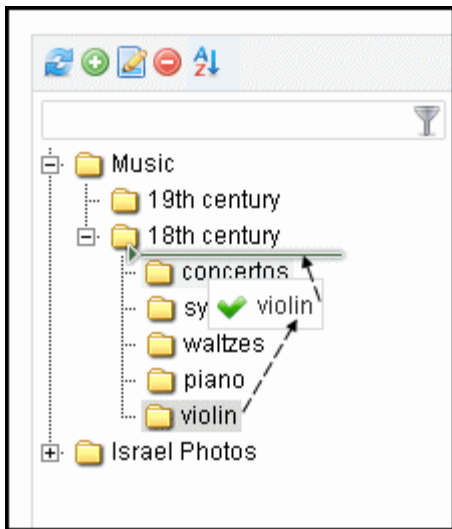
3. Click the first-level option or the parent option.
4. Enter a name for the collection. This name will appear as the collection's label in the hierarchy and will be used as part of the path when the system needs to locate the collection.

The screenshot shows a web-based form for adding a new collection. The form is titled "You are about to add a collection". On the left, there is a folder icon and two buttons: "Add" and "Remove". The main form area includes a "Selected parent" section with a radio button selected for "Add first level collection". Below this are several input fields: "*Collection Name", "Collection Description", "External System", and "External Id". There are also two checkboxes: "Publish" and "Allow Navigation". At the bottom right of the form, there are "Close" and "Save" buttons.

Adding a New Collection

5. Enter a description for the collection. The description will appear in the basic properties information for the collection.
6. Select Publish to publish the collection to Primo.
7. Select Allow Navigation to:
 - Display linked breadcrumbs to this collection in the collection viewer
 - Allow the collection to be displayed in the Collection Viewer. If the check box is cleared, the collection does not appear (if configured).
For staff users the collection is displayed even when the check box is cleared.
8. Click Add under the generic thumbnail image to add a thumbnail to the collection.
 - The image must be in jpg format with a maximum size of 100K.
 - It is recommended that square (1:1) images be used.
 - Images should be not less than 400x400px.
9. Click Add to save the collection.
The collection name appears in the hierarchy where you specified in the Selected parent field.
You can change the order and level of the collection by dragging and dropping it where you want it in the hierarchy.





Collection Drag-n-Drop

Click the Sort icon to alphabetize the list of collections.

To create collections automatically while associating IEs with them, see [Associating IEs with Collections](#).

Editing a Collection

To rename a collection, right-click over the folder in the left column and select Rename collection.

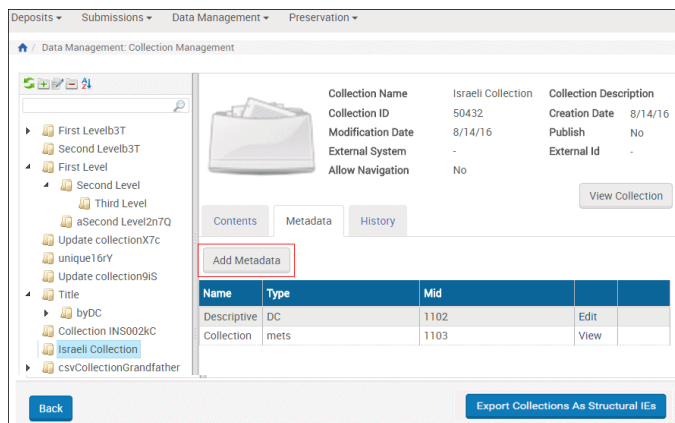
To update the collection description, right-click the folder in the left column and select Edit collection, then update the necessary fields.

Updating Collection Metadata

Collection metadata can be updated from the Metadata tab on the Collection Management page. Users can add metadata elements and assign values from this tab.

To add a new metadata type to a collection:

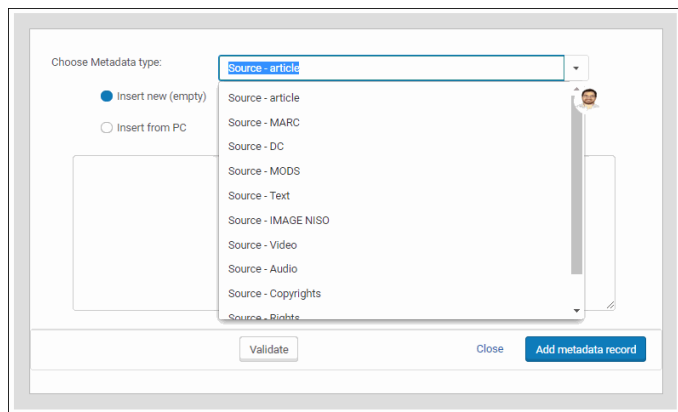
1. From the Metadata tab of the collection you want to edit, click the Add Metadata button



Add Metadata Button for Collection



The Choose metadata type form opens in a light box



Add Metadata Light Box

2. From the drop-down list of metadata types, select the type you want to add. If you do not see your type in the list, select Other.
3. Select the source of the metadata:
 - Insert new to copy the source into a text field
 - Insert from PC to select a metadata file on your PC
4. Use the Validate button to check the metadata before loading it. Any errors will display in red text as the form refreshes.
5. Correct any errors and re-check the validation. When no red text displays after clicking **Validate**, the XML is valid.
6. Click the Add metadata record button to complete the addition.
The system returns you to the Collections Management page. The new metadata appears in the Metadata tab under the existing metadata types.

For information on editing digital collections, see [Editing Digital Collections](#).

Associating IEs with Collections

Users can associate IEs with collections even if the collection does not yet exist. Collections in this case are created during the association of IEs with collections. After a collection has been created, users can edit it and add metadata (DC or source MD).

Users can associate IEs with collections in one of two ways, both of which add a section to the IE's DNX.

In case of failure (for example, the IE is already locked by another user or process), the Process Monitoring UI allows the user to see the details of the IEs that failed. The user can then resolve the problem.

These tasks can be configured as part of SIP processing or, after the IEs are in the permanent repository, as a maintenance process (bulk) or through the Collection tab in the Web editor (manual).

Tasks and Task Chains

Associating IEs with collections involves, in part, running the correct task chain from the Advanced Configuration > Repository > Task Chains page or creating a chain if the one you want doesn't exist.

Two methods for associating IEs with collections are available out-of-the-box as tasks:

- The task Assign Collection by Name should be used when the collection already exists in Rosetta and the ID is known. The task verifies that the collection exists in Rosetta and assigns the IEs to this collection. The parameter for this task is the collection ID, selected by the user who schedules the process.



- The task Assign Collection by DC can be used for the following cases:
 - When assigning IEs to an existing collection, identifiable by Rosetta or external ID in a specified DC field
 - When assigning IEs to a collection, identifiable by a full path in a specified DC field
- For each field occurrence, if the field contains a colon, Rosetta tries to match by Rosetta ID, then by external ID. Match by ID is case sensitive. If no match is found, the task fails. If the field does not contain a colon, Rosetta tries to match by path.
- The expected syntax for assignment by Rosetta ID is `rosetta:{rosetta_id}`. The expected syntax for assignment by external ID is `{external_system}:{external_id}`. The expected syntax for assignment by path is the full collection path, delimited by a specified delimiter. The list of delimiters is configurable in the Collection Task Separators code table.
- The task supports auto-generating new collections based on a collection path only.
- The task supports recursive generation, that is, if the value in the DC field is `a/b/c` (with the delimiter being `/`) and root collection `a` does not exist, Rosetta creates collections `a`, `b` and `c` (and assigns the IE to `c`). When a collection is generated by the task, the collection's creation event the task details.
- Colon (`:`) is reserved and cannot be used in this task either as a collection name or a delimiter.

The screenshot shows the configuration page for a task chain. At the top, it displays 'Task Chain ID: 58', 'Created By: SYSTEM', 'Created On: 16/08/2016 23:05:56', and 'Updated By: Updated On:'. Below this is a 'General Information' section with the following fields:

- * Name: Assign Collection by DC
- * Description: This task chain will assign collection to IE by DC
- * Status: Active (dropdown), Status Date: 16/08/2016
- * Task Chain Level: IE (dropdown)
- * Groups:
 - Preservation
 - Maintenance
 - Validation Stack - Use file level tasks only
 - Workbench
 - Webeditor - Staging
 - Enrichment
 - Move To Permanent
 - Metadata Validation
 - Webeditor - Permanent

Below the groups are buttons for 'Task List' and 'Task Parameters', and an 'Add Task' button. At the bottom, there is a table with one task entry:

Order	Name	Description	Level	Next Step On Failure	
1	Assign Collection By DC	Assign Collection By DC	INTELLECTUAL_ENTITY	-	Delete

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

Customer-Configured Task Chain—Assign by DC

The following parameters are available for this task:



The screenshot shows the 'Task Parameters' configuration for a task chain. It includes a 'DC Field' dropdown set to 'Is Part Of (DCTERMS)', a 'Delimiter' dropdown set to '/', and a 'Delete on Assignment' checkbox that is unchecked. Below these are three checkboxes: 'Generate New Collections' (checked), 'Publish' (unchecked), 'Navigate' (unchecked), and 'Sort' (unchecked).

Task Chain - Task Parameters Tab View

- DC Field – the field that contains the path or external ID by which Rosetta assigns the IEs to a collection.
- Delimiter – the delimiter used for the collection path.
- Delete on Assignment – used when the DC field exists solely for collection assignment. Select to have the field deleted after a successful collection assignment based on a match for the given field.

This DC update does not generate a metadata update event. The field deletion is noted in the IE's collection assignment event as `DCSourceDeleted=true`.

- Generate New Collections – select to have Rosetta generate a new collection according to the value in the DC field and the specified delimiter if no match by path is found. The following options are only available if Generate New Collections is selected.
- Publish – select to have the generated collections published to Primo.
- Navigate – select to display linked breadcrumbs to this collection in the collection viewer.
- Sort – select to have the generated collection's parent re-sorted (0-9A-z) after the collection is generated in order to maintain its order.

Generated collections' descriptions are not auto-populated.

Both tasks are available with Rosetta installation, but only the Assign Collection by Name has a corresponding out-of-the-box task chain. You must configure a new task chain if you want to use the Assign Collection by DC task.

Disassociating IEs from Collections

Disassociating IEs from a collection can be done using a process (bulk) or through the Web editor (manual). The action performs the following:

1. Locks the IE.
2. Creates a new version of the IE without the collection DNX section that held the collection ID.
3. Commits the new version of the IE to the permanent repository.

The task and task chain for this procedure, Unassign Collection, are available on installation. In case of failure (for example, the IE is already locked by another user or process), the Process Monitoring UI allows the user to see the details of the IEs that failed. The user can then resolve the problem.

Searching IEs Within Collections

In the Data Management area, IEs can be searched based on their collection information. The user can open the list of collections, find a particular collection/sub-collection name, and review all the IEs that are associated with the collection.



Data Management: Collection Management

Collection Name: Israeli Collection
 Collection ID: 50432
 Modification Date: 8/14/16
 External System: -
 Allow Navigation: No

Collection Description
 Creation Date: 8/14/16
 Publish: No
 External Id: -

Title	PID	View	Info
1 Cities 1	IE1200	View	Info
2 Cities 2	IE1203	View	Info
3 Cities 3	IE1206	View	Info
4 Cities 4	IE1209	View	Info
5 Cities 5	IE1212	View	Info
6 Cities 6	IE1217	View	Info
7 Cities 7	IE1220	View	Info

IEs in a Collection

Exporting Collections as Structural IEs

Rosetta supports converting collection hierarchies to an equivalent hierarchy of structural IEs. This can be done by exporting a collection hierarchy as structural IEs and depositing the resulting export package back into Rosetta. To export a collection hierarchy and convert it to structural IEs:

1. Click Export Collections As Structural IEs and then click Add Job. The following page opens:

Data Management: Collection Management / Details

Name: Export Collections As Structural IEs Job

Job Parameters

Top Level Collections: 0 items selected. Remove all. Add all.

- selenium collection viewer best fit u3l
- selenium collection viewer o7M

NFS Path: collection2StructuralIE.xml

Email Notification: Send email? No

Buttons: Back, Refresh, Apply

Export Collection As Structural IEs Job

2. Select the top level collections that you want to export. The whole hierarchy of the collection is exported.
3. Enter the NFS path where you want the export to be placed on the server.
4. Click collection2StructuralIE.xml to display the XSL that is used to transform the collection to structural IEs. You can edit this file to customize how the conversion is done.
5. Click Apply. You can repeat these steps to Jobsadd additional jobs.
6. The job appears in the list of

Name	Previous Fire Time	State	History	Update	Run Now	More Actions
1 Export Collections As Structural IEs Job	-	Not Running	History	Update	Run Now	More Actions

Buttons: Back, Refresh

List of Export Collection As Structural IEs Jobs



7. Click Run Now. The collection hierarchy is exported and converted to a structural IEs METS XML.
8. You can now deposit the METS XML as structural IEs.

Searching Collections

Users can search the list of collections by collection name. For a sub-collection, the search should start at the collection level. For example, to search for Spring semester under 2011 under Course catalogue, the user should start with Course catalogue and then 2011. In searches for 2011 or Spring semester, all the sub-collections with this name will be highlighted in the list.

Publishing Collections

Collections can be published using the OAI-PMH protocol, similar to IEs, so that they can be harvested by an OAI-PMH harvester. A published collection's metadata will appear in the OAI set.

For additional information on setting up harvesting Rosetta collections in Primo, see the Rosetta - Primo Integration Guide.

To mark a collection for publishing, right-click over the collection icon in the collection tree, select Edit and select the Publish check box. Clear the box to unpublish the collection. The collection will be published or unpublished during the next Publishing Sync Job.

- The Collections are converted to OAI format using the (institution-level) collection2DC.xsl configuration file. To edit this file, go to Data Management > Manage Sets and Processes > Publishing Configuration > Collection Publishing and click Configure. Only a single xsl configuration per institution is supported for collection publishing.
- The set_spec value will be `{institution code}-collections`.
- When the XSL file is changed, all collections of the relevant institution are published the next time the publishing job runs.
- Publishing is determined by the collection's publish_dnx field (boolean, default=false) and can also be set by collection APIs, CSV collection deposit, and the Assign to Collection by DC task.
- You can schedule collection publishing from the Scheduling option at Data Management > Manage Sets and Processes > Publishing Configuration > Collection Publishing.

Deleting Collections and IEs

Collections or sub-collections can be deleted from the list of collections only if there are no IEs associated with them. The system does not allow the deletion of collections that have associated IEs.

When an IE is deleted, it does not appear as part of any collection to which it once belonged.

To delete a collection that has associated IEs (or sub-collections with associated IEs), run an Unassign Collection process, using the relevant collection(s) as both IE search criteria and task parameter.

Restoring an IE's Previous Version

When a user restores the previous version of an IE, the system determines whether the associated collection still exists. If it does, the system re-associates the IE with the collection.

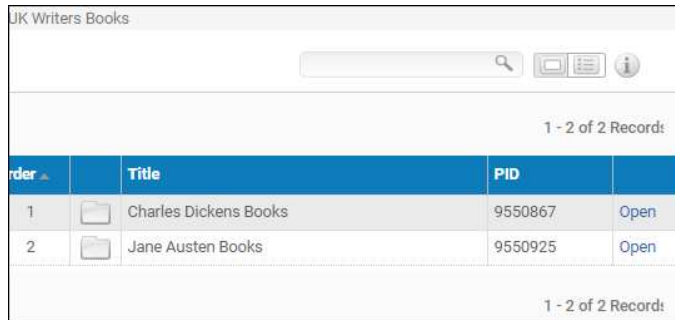
If the collection does not exist, the IE is not re-associated with this collection. The system generates an event displaying the details of the IE and the collection so the case can be tracked and managed.



Collection Delivery

Rosetta allows viewing collections from outside of Rosetta by external patrons. It also allows managing collections by external applications using APIs.

The collection viewer is displayed in a separate browser tab or window, as shown in the figure below:



The screenshot shows a browser window titled "JK Writers Books". At the top, there is a search bar and navigation icons. Below the search bar, it says "1 - 2 of 2 Records:". The main content is a table with the following data:

Order #	Title	PID	
1	Charles Dickens Books	9550867	Open
2	Jane Austen Books	9550925	Open

At the bottom of the table, it says "1 - 2 of 2 Records:".

Collection Viewer

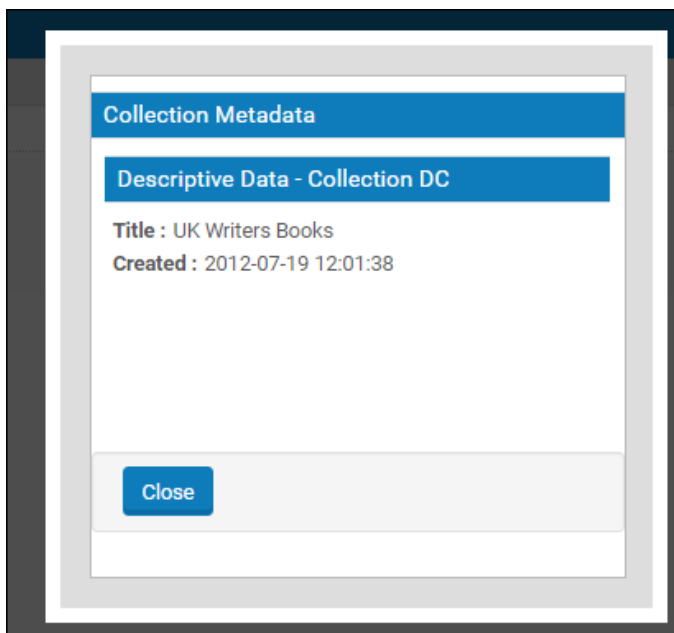
The collection viewer has the following characteristics:

- Access rights are not enforced at the collection level, only at the IE level.
- All IE titles are displayed with thumbnails (see the Thumbnail Creation Rules section in the Rosetta Configuration Guide).
- Browsing among IEs within a collection can only occur within the same collection or its sub-collection(s). In the figure above, this includes all IEs in the Israeli Collection and any IEs in the Israeli Subcollection folder, once that folder is open.
- Breadcrumbs to parent collections (up to three levels) are available depending on each collections' Allow Navigation setting (see [Adding a New Collection](#)).

Collection Metadata

Users can view the descriptive metadata of a collection by clicking the information (i) button. The metadata for the collection appears in a light box:





Collection Viewer with Metadata Light Box

Collection Delivery Requests

There are two possible scenarios for how a delivery request for a collection can be initiated by an external resource discovery system:

- Rosetta Collection ID: The collection ID can be published as part of the IE and extracted by the resource discovery system.
- External System ID: The ID can be stored in Rosetta as part of the collection entity (for example, a DOI). The delivery URL can use the combination of the external system name (such as Aleph) and the external system ID to deliver the collection.

The collection delivery request can include, respectively, either the parameter `col_id=` with the Rosetta collection ID or the parameters `external_system_name` and `external_system_id` that hold the external system name and ID of the collection.

See [Collection Viewer URL](#) for more information on requests and viewer parameters.

Collection Viewer URL

The collection can be retrieved based on:

- Rosetta Collection ID – For example, `http://{server-name}:{port}/delivery/ action/ collectionViewer.do?operation=viewCollection&col_pid=83542`
- External System Details – For example, `http://{server-name}:{port}/delivery/ action/ collectionViewer.do?operation=viewCollection&externalSystem=ALEPH&externalId=83542`

Currently, the only way to populate the external system name/ID in the collection record is through the collection API.

URL Parameters

To control the collection viewer features, users can use the following parameters:



- `displayType` – As a default, the collection viewer opens in list view. However, users calling the viewer externally can control the view mode by adding the following parameter to the URL: `displayType=thumbnails`.
- `pageNum` – The default number of objects in the viewer are defined in a general parameter. However, users can control the number of objects by setting the following parameter: `pageNum=20` (which sets the number of objects on a page to a maximum of 20)



Derivative Copy Representations

Creating and adding representations in general and derivative copies in particular can be performed by staff users with the Technical Analyst (TA) or Data Manager roles. A user who has both a TA role and an Assessor or Arranger role can add derivative copies from the Assessor or Arranger interface.

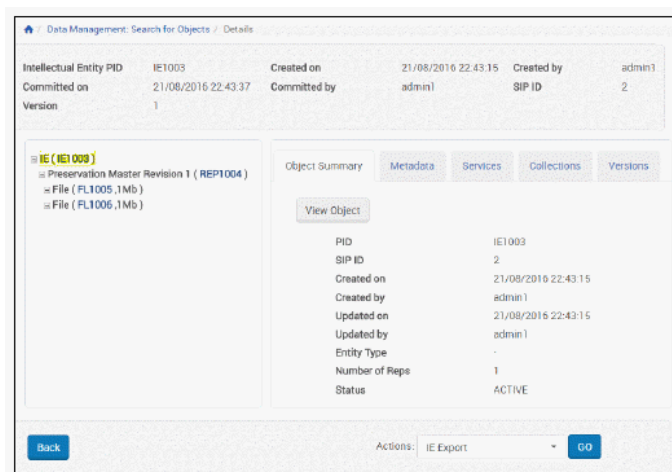
There are three methods for adding derivative copies:

- Manually – see [Manually Adding a Derivative Copy Representation](#)
- With a service – see [Adding a Derivative Copy Representation with a Service](#)
- With a job – see [Adding a Derivative Copy Representation with a Job](#)

Manually Adding a Derivative Copy Representation

You can manually add a derivative copy from the Web Editor. Use this method when you have the derivative copy files. To manually add a derivative copy representation:

1. Open an IE in the Web Editor and lock it.



The screenshot shows the 'Data Management: Search for Objects / Details' page for an Intellectual Entity (IE) with PID IE1003. The entity is in a 'locked' state. The main content area displays the 'Object Summary' for 'IE (IE1003)', which is a 'Preservation Master Revision 1 (REP1004)'. It lists two derivative copy files: 'File (FL1005, 1Mb)' and 'File (FL1006, 1Mb)'. A 'View Object' button is visible. The right-hand side shows a metadata table with the following information:

PID	IE1003
SIP ID	2
Created on	21/08/2016 22:43:15
Created by	admin1
Updated on	21/08/2016 22:43:15
Updated by	admin1
Entity Type	-
Number of Reprs	1
Status	ACTIVE

At the bottom, there is a 'Back' button and an 'Actions' menu with 'IE Export' selected and a 'GO' button.

Web Editor Displaying IE Information

2. From the Actions drop-down menu, click Add Representation, and then click the Go button. The Add Representation - Details page opens:



Home / Data Management: Search for Objects / Details

1

IE General Information

Intellectual Entity PID	IE1003	Created on	21/08/2016 22:43:15	Created by	admin1
Committed on	21/08/2016 22:43:37	Committed by	admin1	SIP ID	2
Version	1				

Please provide details on the representation you are adding

Label

* Preservation Type

Representation Entity Type Representation Code

Access Rights Policy

Cancel

Add Representation - Details Page

3. Enter information in the fields:

- Label
- Preservation Entity Type
- Representation Code
- Access Rights Policy

Only one derivative copy representation with given code and entity type values can be added to any given IE. To add multiple derivative copies to an IE, use different codes or entity type values.

4. Click the Next button.

The Load Page opens. There are two options for uploading files:

- Insert from Local PC – the interface that appears depends on your configuration:
 - If you are a licensed Aurigma user, the following interface appears:



Intellectual Entity PID	IE3399	Created on	20/08/2016 19:21:25	Created by	admin1
Committed on	-	Committed by	-	SIP ID	520
Version	-				

Please select file(s) to upload

Files for upload Change view:

[Add more files](#), [add folder](#) or remove all files

Drop files here...

No files to upload

Selected Files

Order	File Name	Label	Physical Structmap Label	Note	Source	Size	Date
<input type="button" value="Back"/> <input type="button" value="Cancel"/> <input type="button" value="Done"/>							

Derivative Copy Load Page – Aurigma Users

You can:

- drag and drop files onto the page
- click Add more files and select the files
 - click Add folder and select the folder
 To use the manual interface instead, click Load Files Manually.
- If you are not using Aurigma, the following interface appears:



Submissions: Assess SIPs / Details

IE General Information

Intellectual Entity PID IE3399 Created on 20/08/2016 19:21:25 Created by admin1
 Committed on - Committed by - SIP ID 520
 Version -

Please select file(s) to upload

Insert from Local PC Choose From Server

Select File Load the files using the applet

* File

Label

* Physical Structmap Label

Notes

Selected Files

Order	File Name	Label	Physical Structmap Label	Note	Source	Size	Date
-------	-----------	-------	--------------------------	------	--------	------	------

Manual Upload Interface

Browse to the file you want to upload and click Add Selected File. Repeat for each file you want to upload.

Uploaded files are listed in the Selected Files portion of the page:

Order	File Name	Label	Physical Structmap Label	Note	Source	Size	Date
1	African Buffalo.jpg	African Buffalo	African Buffalo		/exlibris/dps/d4_1/profile/operati...	383.42	22/08/2016
2	Dolphins.jpg	Dolphins	Dolphins		/exlibris/dps/d4_1/profile/operati...	123.43	22/08/2016
3	Lion.jpg	Lion	Lion		/exlibris/dps/d4_1/profile/operati...	245.65	22/08/2016

Selected Files Order

The Selected Files pane displays the selected files as described in the following table:

Selected Files Pane

Column	Description
#	The selected files' deposit activity priority.
Set Order	Use the Up and Down arrows to change the selected files' order in the IE.
File Name	Displays the name of the selected file.
Label	Provides a field for a label to be shown when the IE is viewed in Delivery (optional).
Source	Displays the source of the selected file. This is either Local or URL.



Column	Description
Size	Displays the size of the selected file.
Date	Displays the date on which the selected file was deposited.

For multiple files, to change the order of the files, click the arrows of the rows you want to change. When you have the files in the correct order, click the Done button.

- Choose from Server – To load files from a location on the server instead, first place the files you want to upload under the home directory on the server. Then click the Choose From Server tab on this page and enter the directory path in the Import Directory field. Rosetta takes all of the files under that directory and uploads them to the system.
5. When you are finished, click Done.
Rosetta creates the derivative copies.

Adding a Derivative Copy Representation with a Service

You can create a derivative copy representation with a service. Use the service when you want Rosetta to generate the files for you, either one-off (via the Web editor) or in bulk (as a task).

To create a derivative copy representation with a service:

1. Display an IE in the Web Editor.
2. On the IE level, select the Services tab.
3. Select the Create Derivative Copy Representation service. The following appears:

Create Derivative Copy Representation Service

4. Fill in the fields:



- Priority – select the priority of the service
- Preservation Type – select Derivative Copy
- Representation Entity Type (Input) – select the representation entity type for the input
- File Extension Filter – select the file extensions on which to run the service
- Copy other extensions – copy the files with extensions not included in the filter
- Plug-in Type – select one of the following:
 - Transform Profile, and select a profile from the list
 - Stream Handler, and select a stream handler from the list
(For more information, see [Stream Handlers](#) and [Transformation Profiles](#) in the Rosetta Configuration Guide.)
- Representation Code – select a representation code
- Access rights policy – select an access rights policy
- Representation Entity Type (Output) – select a representation entity type for the output
- File Entity Type (Output) – select a file entity type for the output to be applied to all new files
- Send Email? – enter an email address to be notified when the service is completed
The Create Derivative Copy Representation service creates the derivative copy.

Only one derivative copy representation with given code and entity type values can be added to any given IE.
To add multiple derivative copies to an IE, use different codes or entity type values.

5. Click Submit.

Adding a Derivative Copy Representation with a Job

You can create a derivative copy representation with a job. Use the job when you have files and want to run in bulk.
To create a derivative copy representation with a job:

1. Select Derivative Copy Job (Data Management > Manage Sets and Processes > Derivative Copy Job).
2. Click Add Job. The following appears:



Home / Data Management: Derivative Copy Job / Details

* Name

[Hourly](#)

[Daily](#)

[Weekly](#)

[Monthly](#)

[Advanced](#)

Start At

Time

Date

Repeat

Indefinitely

Until

Perform this task :

Every Hour/s

Job Parameters

* User ID

* NFS Path

Auto-Generate Logical Structmap

Derivative Copies Job

3. Fill in the fields to schedule the job. For more information, see [Submission Jobs](#).
4. In the Job Parameters section, enter your user ID and the path of the folder that contains the files to be used to create the derivative copy representations.
The NFS path you indicate should be built in the following format:
 - Each folder in the NFS path indicates a separate IE.
 - Each IE folder should contains a METS file that contains the information to create one or more derivative copy representations. The METS file must contain:
 - An ie-amd with PID internalIdentifier (only). For example:

```
<mets:amdSec ID="ie-amd">
```

```
  <mets:techMD ID="ie-amd-tech">
```

```
    <mets:mdWrap MDTYPE="OTHER" OTHERMDTYPE="dnx">
```

```
      <mets:xmlData>
```

```
        <dnx xmlns="http://www.exlibrisgroup.com/dps/dnx">
```



```

<section id="internalIdentifier">
  <record>
    <key id="internalIdentifierType">PID</key>
    <key id="internalIdentifierValue">IE13660</key>
  </record>
</section>
</dnx>
</mets:xmlData>
</mets:mdWrap>
</mets:techMD>
</mets:amdSec>

```

- A generalRepCharacteristics section (for each REP), specifying preservation type (must be DERIVATIVE_COPY), representation entity type, and representation code. For example:

```

<mets:amdSec ID="rep1-amd">
  <mets:techMD ID="rep1-amd-tech">
    <mets:mdWrap MDTYPE="OTHER" OTHERMDTYPE="dnx">
      <mets:xmlData>
        <dnx xmlns="http://www.exlibrisgroup.com/dps/dnx">
          <section id="generalRepCharacteristics">
            <record>
              <key id="preservationType">DERIVATIVE_COPY</key>
              <key id="representationEntityType">JPEG Images</key>
              <key id="RepresentationCode">MEDIUM</key> (for some reason this is uppercase - fix?)
            </record>
          </section>
        </dnx>
      </mets:xmlData>
    </mets:mdWrap>
  </mets:techMD>
</mets:amdSec>

```



```
</section>
</dnx>
</mets.xmlData>
</mets.mdWrap>
</mets.techMD>
</mets.amdSec>
```

- A generalFileCharacteristics section (for each file), containing any field that is supported when submitting as part of a SIP. For example:

```
<mets.amdSec ID="FL1-1-amd">
  <mets.techMD ID="FL1-1-amd-tech">
    <mets.mdWrap MDTYPE="OTHER" OTHERMDTYPE="dnx">
      <mets.xmlData>
        <dnx xmlns="http://www.exlibrisgroup.com/dps/dnx">
          <section id="generalFileCharacteristics">
            <record>
              <key id="label"></key>
              <key id="note"></key>
              <key id="FileEntityType"></key>
              ...
            </record>
          </section>
        </dnx>
      </mets.xmlData>
    </mets.mdWrap>
```



</mets:techMD>

</mets:amdSec>

- A fileSec, + a fileGrp(s) for each REP.
The METS file may contain:
- File level descriptive (DC, source) metadata sections
- Representation level source metadata sections
- Representation level access rights policy
- Physical structmaps. If none are provided, and no other SM is provided (and flag is false), Rosetta will generate physical structmap.
- Logical (EXL/custom) structmaps
- The NFS path should contain a Streams folder that contains the files of the derivative copy representations. (Absolute NFS paths and HTTP references are also supported.)

Rosetta allows only one derivative copy with a given entity type and representation code per IE. Adding a derivative copy to an IE that has a derivative copy with the same entity type and code with this job overwrites the representation.

- You can prevent the job from processing a folder. (This can be useful if you do not want it to be loaded prematurely.) To do so, create an empty file in the submission job folder and name it locked (or .locked).
- While processing a folder, the submission job adds a locked file.
- After a folder has been successfully processed, the submission job adds a done file. Folders with done files are not processed by the submission job. You can create a cron job to clean up these folders.
- After a folder has been unsuccessfully processed, the submission job adds an error file. Folders with error files are reprocessed by the submission job (and should not be deleted). Users can use this file to identify problematic submission folders.



Web Editor

This page was not added to the PDF due to the following tag(s): article:topic-guide



Web Editor

- [About the Web Editor](#)
- [Accessing the Web Editor](#)
- [Viewing Digital Objects in the Web Editor](#)
- [Viewing and Editing Structural Intellectual Entities](#)
- [Editing Digital Objects](#)
- [Managing Full-Text](#)



About the Web Editor

About the Web Editor

When Rosetta moves files from the Deposit Server to the Staging Server, a METS file containing descriptive and administrative metadata is generated for each intellectual entity (IE). This metadata can describe an IE as a whole, its individual representations, and its files. (For more information about METS files, see the Rosetta Overview Guide.) The Web Editor allows staff users to access repository objects at various stages of their ingestion and maintenance. Staff users can access different types and levels of metadata and make changes, where necessary, to the metadata.



Accessing the Web Editor

Accessing the Web Editor

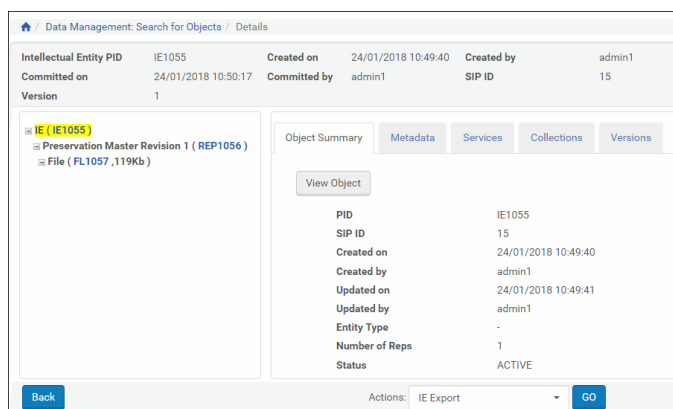
Staff users can view descriptive and administrative metadata in the Web Editor from a search on a home page, from any of the search fields that appear near the top of most pages, through a link on the Data Management main page, or from a search link related to a list of sets (see below, for example).

Through a Search

1. Perform a search for the object you want to edit using the Rosetta Search in the right column of any main page.
2. When the results include an object you want to work with, click the Info text link corresponding to the row of that object.
3. The object opens in the Web Editor.

Through a List of Sets

1. Follow the path from Data Management > Manage Sets and Processes > Manage Sets to the Set List page.
2. Click Members (for itemized sets) or Results (for logical sets) on the row of the set containing the object you want to access.
3. Click the Info text link beside the object whose metadata you want to view in the Web Editor.
The Web Editor opens to the object whose Info link you clicked:



The screenshot shows the 'Data Management: Search for Objects / Details' page. It displays metadata for an Intellectual Entity (IE) with PID IE1055. The metadata includes: Created on 24/01/2018 10:49:40, Created by admin1, Committed on 24/01/2018 10:50:17, Committed by admin1, SIP ID 15, and Version 1. The left sidebar shows a tree view with 'IE (IE1055)', 'Preservation Master Revision 1 (REP1056)', and 'File (FL1057, 119Kb)'. The main content area has tabs for 'Object Summary', 'Metadata', 'Services', 'Collections', and 'Versions'. The 'Object Summary' tab is active, showing a 'View Object' button and a list of metadata: PID IE1055, SIP ID 15, Created on 24/01/2018 10:49:40, Created by admin1, Updated on 24/01/2018 10:49:41, Updated by admin1, Entity Type -, Number of Reps 1, and Status ACTIVE. At the bottom, there is a 'Back' button, an 'Actions:' dropdown menu with 'IE Export' selected, and a 'GO' button.

Web Editor

The Intellectual Entity page of the Web Editor contains two panes:



- The tree pane on the left contains the tree view of the representations and files that make up the IE.
- The content pane on the right contains summary information about the object selected in the tree pane.

Structural IEs do not have a tree pane.



Viewing Digital Objects in the Web Editor

Viewing Digital Objects in the Web Editor

There are two types of Intellectual Entities available in Rosetta:

- Content IEs – can contain representations and files, but not links other IEs
- Structural IEs – can contain links to other IEs, either structural or content, but no representations and files

The following section describes functionality for content IEs. For information unique to structural IEs, see [Viewing and Editing Structural Intellectual Entities](#).

To view digital objects:

1. In the tree pane, select the object level (IE, representation, or file) you want to view. The object opens in the content pane to the default tab, Object Summary.
2. In the content pane, click one of the following tabs:
 - Object Summary, to view summary data and administrative metadata. (For more information, see [Object Summary Tab](#).)
 - Metadata, to view descriptive metadata and perform several actions available from this tab. (For more information, see [Metadata Tab](#).)
 - Services, to view a list of available services that can be run for the specific IE, representation, or file you have isolated. (For more information, see [Services Tab](#).)
 - Versions (IE only), to view information about previous versions of an IE and possibly restore those versions. (See [Versions Tab](#).)
 - Collections (IE Only): to view details about collections to which the IE belongs. (See [Collections Tab](#).)
 - Bitstreams (file only), to view information about file bitstreams. (See [Bitstreams Tab](#).)
 - File Summary (file only), when you want to view technical information about a file that is a part of the IE. (For more information, see [File Summary Tab](#).)

Object Summary Tab

The Object Summary tab displays general metadata about the object. It is the default tab when a user selects any of the items in the IE tree (IE, Representation, or File).



Web Editor - Object Summary Tab

For IEs, the View Object button shows on the Object Summary tab. Clicking this button opens the object in the Delivery viewer with which it is associated.

Fields displayed on the Object Summary tab are defined in the DNX profile configured by your Administrator. (For more information about DNX profiles, see the Rosetta Overview Guide.) Fields generally include PID, SIP ID, Created by, dates for creation and update, and other administrative and technical metadata, depending on the type of object selected in the tree pane. Representations, for example, include Preservation Type and Usage Type, while Files list values like MIME Type:

Object Summary Fields for File

Metadata Tab

The Metadata tab displays the list of metadata associated with the IE, representation, or file that is selected.



Intellectual Entity PID: IE10820
 Created on: 11/03/2011 19:56:01
 Committed on: 25/11/2019 10:41:50
 Committed by: admin1
 Version: 7

Locked By: Me.

Object Summary | Metadata | Services | Collections | Versions

Name	Type	Mid		
Local	Access Rights	1324	View	Remove
Descriptive	DC	6727	Edit	
Policy	Access Rights	AR_EVERYONE	View	
DNX	DNX	DNX_IE10820	Edit	

Actions: IE Export

Web Editor - Metadata Tab

Depending on whether the Metadata tab is open to an IE, a representation, or a file, one or more buttons appear above the information table and allow the user to perform the following tasks:

- **Add MD:** Add source metadata to ensure no metadata is lost from the original object. The source can be any of the following types: MARC, MODS, DC, NISO, copyrights, rights. Source metadata can be added even if there is already source metadata associated with the IE, representation, or file. For information on adding and editing source metadata, see [Editing Metadata through the Web Editor Interface](#).
- **Assign CMS:** Assign a collection management system ID to the item to allow the integration of an external system (for more information, see [Editing Digital Objects](#))
- **Assign AR (Editors only):** Assign access rights to the IE or representation to limit its availability (see [Assigning an Access Rights Policy](#))
- **Assign AR Exceptions (Editors only):** For specified IEs, provide additional access that expands the rights already defined for a group of users (see [Access Rights Exceptions](#))
- **Assign RP:** Assign a retention policy to limit the duration of the IE's storage period

All buttons, when clicked, open prompts and in some cases wizards for the user to complete a task.

Additional actions can be performed on the object by making a selection from the Actions drop-down menu in the bottom right corner of the page. This menu changes according to the object selected in the tree view of the Web Editor, its qualities, and whether the IE has been locked or not.

When an action is being performed on an IE or other object, the system creates a working copy for the user performing the action. Any views of the object by other users will maintain the previous data for the object and will not be editable. Once the object is saved, the new version replaces the old.

Services Tab

The Services tab shows all the available services for the IE, representation, or file. Services consist of actions that can be performed on the data, such as those that appear in the figure below.



Data Management: Search for Objects / Details

Intellectual Entity PID IE10820 Created on 11/03/2011 19:56:01 Created by admin1
 Committed on 25/11/2019 10:41:50 Committed by admin1 SIP ID 96
 Version 7

Locked By: Me.

IE (IE10820)

- Derivative Copy (REP45483)
 - File (FL45484 , 131Kb)
 - File (FL45485 , 136Kb)
 - File (FL45486 , 129Kb)
 - File (FL45487 , 139Kb)
 - File (FL45488 , 137Kb)
 - File (FL45489 , 138Kb)
 - File (FL45490 , 142Kb)
 - File (FL45491 , 146Kb)
 - File (FL45492 , 137Kb)
 - File (FL45493 , 143Kb)
 - File (FL45494 , 142Kb)
 - File (FL45495 , 131Kb)
 - File (FL45496 , 140Kb)
 - File (FL45497 , 136Kb)
 - File (FL45498 , 65Kb)
 - File (FL45499 , 32Kb)

Object Summary Metadata Services Collections Versions

- Validation Stack - Full with SHA-512 fixity
- access right change
- Add File PI
- Add PI
- Add Representation Enrichment
- Add to collection (by DC field)
- Add to collection (by name)
- Alma Delete Inventory
- Assign Access Rights Policy
- Assign Collection by DC
- Assign Collection by Name
- Assign PI
- change entitytype
- Clean Operational Thumbnails
- CMS Update
- Create Derivative Copy Representation
- Create Operational Thumbnails
- DC Replace
- Delete Derivative Copy Representation
- Enrichment - Minimal
- Enrichment - Minimal
- Enrichment 2
- Export Intellectual Entities
- Export Representations
- Fixity&virus
- Generate DOI
- Generate Logical Structmap

Web Editor, Services Tab

Users can run services from this tab by selecting the IE, representation, or file on the left and clicking the available service on the right.

The System Administrator can take task chains, classify them as maintenance, and they will appear here.

Editors with the necessary privileges (typical or full) can perform these services (see descriptions below).

Out-of-the-Box Services

Name	Description
Enrichment - Minimal	Includes only the minimal tasks performed as part of the enrichment phase (such as indexing)
Validation Stack - Fixity Only	Runs the checksum of the files and compares it to the value stored in the METS file.
Validation Stack - Full	The full validation stack including the fixity, virus check, format identification and validation, and risk identification.
Metadata Validation	Validates the metadata against the metadata profile.
Create Operational Thumbnails	Creates a thumbnail from a file using a dedicated utility.
Rebuild Repository Search Indexes	Re-indexes the IE in the repository search index
Create Derivative Copy	Creates a lighter version of an existing preserved representation copy, for example,



Name	Description
Representation	a lower-resolution image (tiff to jpg).
Re-Create Derivative Copy Representation	Overrides existing derivative copies (when, for example, they are of poor quality).

Collections Tab

If there are collections associated with the IEs, the Web editor displays the Collections tab.

Web Editor Collections Tab

The Assign to Collection buttons always appear if the IE is locked. Collections to which the IE is already assigned are listed in the collection table. Click the Metadata text link to view the collection in the collection management interface. Click View to view the collection in the collection viewer. Click Unassign to detach the IE from the collection.

Versions Tab

If more than one version of an IE exists in the database, the Web editor displays a Versions tab. This tab displays a list of current and older versions of an IE.

Web Editor, Versions Tab

Staff with sufficient authorization can retrieve an older version of an IE from the permanent repository and store it as the new and latest version. Click Events to view a list of events pertinent to a given IE version.



File Summary Tab

The File Summary tab displays the validation stack report. The report contains information about tasks that the Rosetta system performed on the file. (For more information about validation stacks, see [Configuring SIP Processing in the Rosetta Configuration Guide](#).) The File Summary tab is visible only when a file component is highlighted in the tree view of the Web editor.

Agent	Date	Type	Result	Result Details
1 REG_SA_JAVAS_EXITY	Thu Oct 07 09:23:55 IST 2010	Checksum	Passed	
2 REG_SA_DPS	Thu Oct 07 09:23:55 IST 2010	Visual Check	Passed	
3 REG_SA_DROID	Thu Oct 07 09:23:55 IST 2010	File Format	Passed	
4 JHOVE_JPEG-NUJ 1.2, Plugin Version 2.0	Thu Oct 07 09:23:56 IST 2010	Technical MD Extraction	Passed	
5 REG_SA_DPS	Thu Oct 07 09:23:56 IST 2010	Risk Analysis	Passed	

Web Editor Page - File Summary Tab

Bitstreams Tab

The Bitstreams tab displays in the Web Editor when the IE includes file streams.

ID	Name	Path	Extension	Mime Type	Format Name	Format Description	Size
1	B597730 NZ-report.png	/exlibris/dps/04...	png	image/png	fmt/12	Portable Network...	64835b
2	B597729 new 37.txt	/exlibris/dps/04...	txt	text/plain	x-fmt/16	Unicode Text File	2137b
3	B597731 wintemocomm.jpg	/exlibris/dps/04...	jpg	image/jpeg	fmt/43	JPEG File Interach...	145567b
4	B597732 ****.png	/exlibris/dps/04...	png	image/png	fmt/12	Portable Network...	3057495b

Web Editor - Bitstreams Tab

The Bitstreams tab displays information for each of the bitstreams extracted from the IE. The information includes identification, location, and file type.

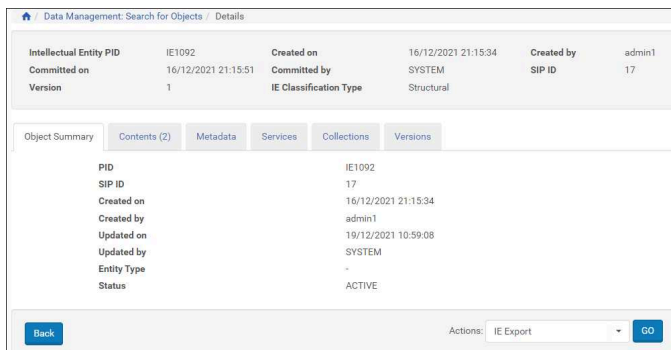


Viewing and Editing Structural Intellectual Entities

Viewing and Editing Structural Intellectual Entities

Structural IEs differ from content IEs in that structural IEs can contain only other IEs, not representations or files. The following section describes the unique features of structural IEs. For additional information that is common also to content IEs, see [Viewing Digital Objects in the Web Editor](#).

The Web Editor appears as follows when editing structural IEs:



Intellectual Entity PID	IE1092	Created on	16/12/2021 21:15:34	Created by	admin1
Committed on	16/12/2021 21:15:51	Committed by	SYSTEM	SIP ID	17
Version	1	IE Classification Type	Structural		

Object Summary	Contents (2)	Metadata	Services	Collections	Versions
PID					IE1092
SIP ID					17
Created on					16/12/2021 21:15:34
Created by					admin1
Updated on					19/12/2021 10:59:08
Updated by					SYSTEM
Entity Type					-
Status					ACTIVE

Actions: IE Export

Structural IEs in the Web Editor

Contents Tab

In the Web Editor, structural IEs have a Contents tab that displays the number of children for the IE. The Contents tab appears as follows:



Data Management: Search for Objects | Details

Intellectual Entity PID: IE3090 | Created on: 14/02/2023 05:42:11 | Created by: admin1
 Committed on: 14/02/2023 05:42:33 | Committed by: admin1 | SIP ID: 459
 Version: 1 | IE Classification Type: Structural

Locked By: Me.

Object Summary | Contents (13) | Metadata | Services | Collections | Versions

View: Default Paging | 1 - 10 of 13 Records | 1 2 > >>

Add Children | Remove Selected

	Title	PID	IE Entity Type	IE Classification Type	Order Sequence	
1	SDK - TEST DC	IE3084	Content	Content	1	Editor More Actions
2	SDK - TEST DC	IE3087	Content	Content	2	Editor More Actions
3	Selenium Title	IE3104	Content	Content	3	Editor More Actions
4	Water lilies	IE1000	Content	Content	4	Editor More Actions
5	Water lilies	IE1003	Content	Content	5	Editor More Actions
6	Health to health promotion : transforming health	IE1009	Content	Content	6	Editor More Actions
7	Water lilies	IE1012	Content	Content	7	Editor More Actions
8	Water lilies	IE1015	Content	Content	8	Editor More Actions
9	Selenium Title	IE1027	Content	Content	9	Editor More Actions
10	TA Bytestream selenium test	IE1077	Content	Content	10	Editor More Actions

1 - 10 of 13 Records | 1 2 > >>

Back | Actions: IE Export | GO

Structural IEs - Contents Tab

The children IEs of the structural IE are displayed. The IE Classification Type column indicates the type of IE for the children IEs, and the Order Sequence column indicates the order of the children IEs. You can drag and drop the IEs to change their sequence. The order sequence number changes automatically. Another way to change the IE sequence is to click More Actions > Reorder for the IE whose order you want to change. The following appears:

Reorder child IE IE90054 from order sequence 1 to

* New Order Sequence:

Close Order Sequence Gap After Reorder

Cancel Save

Reorder Child IE

Enter the sequence number that you want the IE to be. If you want Rosetta to fill in any gap in the order sequence that the reordering caused, select the **Close Order Sequence Gap After Reorder** checkbox. Click **Save** and the IE is given the new sequence.

Removing Children IEs

You can remove the children IEs of a structural IE by clicking Remove for the child IE or selecting the check box for the IE and clicking Remove Selected.

A removal confirmation message appears, including a check box that allows you to indicate if the sequence gaps created by the removal should be closed. Clear the check box to have all other sequence numbers remain. Click OK to complete the removal.

Adding Children IEs

You can add children IEs to a structural IE by clicking Add Children. A search box appears that allows you to search for IEs in Rosetta. The IEs are added to the structural IE as the next IE in the sequence.

Metadata Tab

The Metadata tab allows you to view descriptive metadata and perform several actions on it. For more information, see [Metadata Tab](#).



Services Tab

The Services tab allows you to view a list of available services on the IE-level. For more information, see [Services Tab](#).

Versions Tab

The Versions tab allows you to view information about previous versions of an IE and possibly restore those versions. If the restored version includes relationships to children IEs that do not exist any more in the system or have a different parent IE, these relationships are removed from the restored version. The Cannot Restore Child IE Relationships event is recorded on the restored IE, detailing the child IEs that could not be restored.

For more information, see [Versions Tab](#).

Deleting a Structural IE

You cannot delete a structural IE that has children IEs. To delete the structural IE, first remove the relationships to the children IEs, commit the change, and then delete the structural IE.



Editing Digital Objects

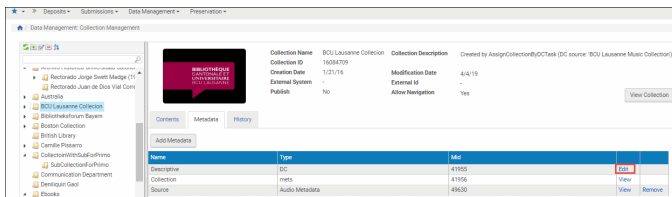
Editing Digital Objects

Editors can view and edit metadata for all three object types (IE, representation, file) using the Web Editor interface. When you make changes to data in the repository, the system creates a working copy and locks the IE so that it is read-only to other users and cannot be opened for editing. Only after you have completed edits is the edited IE regenerated by the system and unlocked. The exception to this rule is when a staff user is editing access rights. Access rights are implemented immediately with no working copy generated. For more information, see [Access Rights](#). For information on adding and editing representations, see [Adding a Representation: Process and Steps](#).

Editing Digital Collections

To add or edit a collection metadata element:

1. From the Metadata tab of the collection you want to edit, click Edit in the row of the metadata type.



Name	Type	MD	
Description	DC	41600	Edit
Collection	nets	41556	View
Source	Audio Metadata	49600	View Remove

Editing Existing Metadata for a Collection

The Add Tag page opens.



🏠 / Data Management: Collection Management / Details

	<input type="checkbox"/>	Tag Code	Tag Name	Tag Description
1	<input type="checkbox"/>	dc:contributor	Contributor	Contributor
2	<input type="checkbox"/>	dc:coverage	Coverage	Coverage
3	<input type="checkbox"/>	dc:creator	Creator	Creator
4	<input type="checkbox"/>	dc:date	Date	Date
5	<input type="checkbox"/>	dc:description	Description	Description
6	<input type="checkbox"/>	dc:format	Format	Format
7	<input type="checkbox"/>	dc:identifier	Identifier	Identifier
8	<input type="checkbox"/>	dc:language	Language	Language
9	<input type="checkbox"/>	dc:publisher	Publisher	Publisher
10	<input type="checkbox"/>	dc:relation	Relation	Relation
11	<input type="checkbox"/>	dc:rights	Rights	Rights
12	<input type="checkbox"/>	dc:source	Source	Source
13	<input type="checkbox"/>	dc:subject	Subject	Subject
14	<input type="checkbox"/>	dc:title	Title	Title
15	<input type="checkbox"/>	dc:type	Type	Type
16	<input type="checkbox"/>	dcterms:abstract	Abstract	Abstract
17	<input type="checkbox"/>	dcterms:accessRights	Access Rights	Access Rights
18	<input type="checkbox"/>	dcterms:accrualMethod	Accrual Method	Accrual Method
19	<input type="checkbox"/>	dcterms:accrualPeriodicity	Accrual Periodicity	Accrual Periodicity
20	<input type="checkbox"/>	dcterms:accrualPolicy	Accrual Policy	Accrual Policy
21	<input type="checkbox"/>	dcterms:alternative	Alternative Title	Alternative Title
22	<input type="checkbox"/>	dcterms:audience	Audience	Audience
23	<input type="checkbox"/>	dcterms:available	Available	Available
24	<input type="checkbox"/>	dcterms:bibliographicCitation	Bibliographic Citation	Bibliographic Citation
25	<input type="checkbox"/>	dcterms:conformsTo	Conforms To	Conforms To

[Back](#)

Add Metadata Tag

2. Click one or more elements from the list to add to your collection's metadata.
3. Click Select.
The Full View page for the metadata type you selected opens. It contains the element(s) that you entered.

★ >> Deposits Submissions Data Management Preservation

🏠 / Data Management: Collection Management / Details

MID	41955	Metadata Type	descriptive:dc	Description	undefined
Created by		Creation Date	21/01/2016 18:42:54		
Updated by		Update Date	21/01/2016 18:42:54		

<input type="checkbox"/>	Tag	Qualifier	Data
<input type="checkbox"/>	dc:title		BCU Lausanne Collection
<input type="checkbox"/>	dc:title		BCU Lausanne Collection
<input type="checkbox"/>	dc:date		

[Add Tag](#) [Delete](#) [Display Option](#)

Error Message Report

[Validate](#) [Cancel](#) [Save](#)

DC Full View Page

4. To enter data in the new field, click the text of the new field (in the above image, Date).
The DC Field page opens.



★ Deposits Submissions Data Management Preservation

Home / Data Management: Collection Management / Details

MID	41955	Metadata Type	descriptive:dc	Description	undefined
Created by		Creation Date	21/01/2016 18:42:54		
Updated by		Update Date	21/01/2016 18:42:54		

Current Field: dc:date

Update Value

Qualifier	Value
xml:lang	<input type="text"/>

Error Message Report Help

Date
 Definition: A date of an event in the lifecycle of the resource.
 Comment: Typically, Date will be associated with the creation or availability of the resource.
 Recommended best practice for encoding the date value is defined in a profile of ISO 8601 [W3CDTF] and includes (among others) dates of the form YYYY-MM-DD.

DC Field Page

A definition for the field and comments about its usage appear at the bottom section of the page (under the Help tab).

5. Enter a value for the field in the Update Value field.
6. Enter a qualifier value, if relevant.
7. To save the new value(s), click the Save Field button.
The DC (or other metadata) Full View page opens with the new field and value(s) in the list of tags.

★ Deposits Submissions Data Management Preservation

Home / Data Management: Collection Management / Details

MID	41955	Metadata Type	descriptive:dc	Description	undefined
Created by		Creation Date	21/01/2016 18:42:54		
Updated by		Update Date	21/01/2016 18:42:54		

<input type="checkbox"/>	Tag	Qualifier	Data
<input type="checkbox"/>	dc:title		BCU Lausanne Collection
<input type="checkbox"/>	dc:title		BCU Lausanne Collection
<input type="checkbox"/>	dc:date	xml:lang="en"	25-11-2019

Add Tag Delete Display Option

Error Message Report

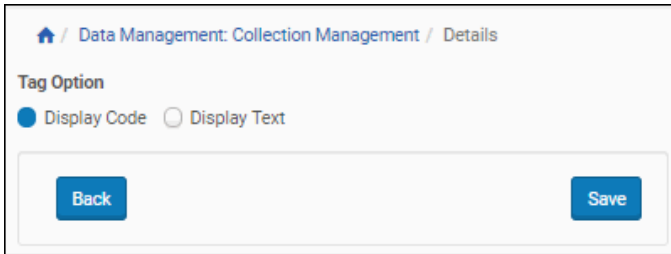
DC Full View, Element Added

The metadata profile assigned to the material flow that was used to create the IE continues to be enforced. From this page, you can:

- Repeat the procedure and add another tag (click Add Tag)
- Delete any tags (by selecting their check boxes and clicking the Delete button)



- Change the display of tags from tag name (“text”) to tag code or the reverse (click the Display Option button and select the code or name display)



Code Versus Text for Metadata Elements

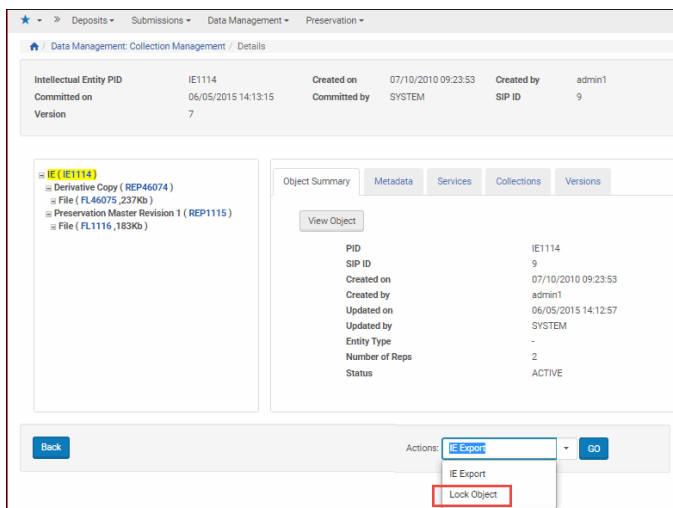
- View any error messages (Error Message Report tab)
 - Cancel your edits (click Cancel)
 - Validate the metadata changes you made (click the Validate button)
8. When you have finished with your edits, click the Save button.

The system saves your edits to the collection metadata.

Editing Metadata through the Web Editor Interface

To edit metadata from the Web Editor:

1. Access the object whose metadata you want to edit by running a search and selecting Info in the object’s row. The Web Editor opens to your object.
2. If the object is not an IE, click the IE object level in the left pane.
3. Click the Actions drop-down menu in the lower right corner. If the option to Lock Object appears, select it and click the GO button. (If the object is already locked, move to the next step.)



Web Editor Page, Locking an Object

The page refreshes with a note in red informing you that the object is locked to your ID.



If Lock Object does not appear in the Actions drop-down menu, you (or another user) have already locked it for use or you are not authorized to edit the IE.

4. In the content pane, click the Metadata tab.

Intellectual Entity PID: IE10820
Created on: 11/03/2011 19:56:01
Created by: SIP ID
Committed on: 25/11/2019 10:41:50
Committed by: admin1
Version: 7

Locked By: Me

Object Summary | **Metadata** | Services | Collections | Versions

Add Metadata | Assign CMS | Assign AR | Assign AR Exceptions | Assign RP

Name	Type	Mid		
Local	Access Rights	1324	View	Remove
Descriptive	DC	6727	Edit	
Policy	Access Rights	AR_EVERYONE	View	
DNX	DNX	DNX_IE10820	Edit	

Actions: IE Export GO

Web Editor - Metadata Tab

Editing Descriptive Metadata

To edit descriptive metadata:

1. In the Descriptive row, click Edit. The following appears:

Deposits | Submissions | Data Management | Preservation

Home / Data Management / Search and Manage Queries / Search for Objects / DC Full View

MID: 1000 | Metadata Type: descriptive:dc | Description: [empty]
Created by: admin1 | Creation Date: 10/08/2016 09:09:14
Updated by: [empty] | Update Date: 10/08/2016 09:09:15

Tag	Qualifier	Data
dc:creator		Selenium
dc:identifier		
dc:identifier		ISBN 1-56389-668-0
dc:identifier		

Add Tag | Delete | Display Option

Cancel | Validate | Save

Tag List

2. To edit a tag, click the tag. The following appears, for example:



Home / Data Management: Search for Objects / Details

MID	3780	Metadata Type	descriptive:dc	Description	these are some pictures
Created by	admin1	Creation Date	07/10/2010 09:23:53		
Updated by		Update Date	06/05/2015 14:12:57		

Current Field: dc:title

Update Value:

Qualifier	Value
xml:lang	<input type="text"/>

Error Message Report | Help

Title
 Definition: A name given to the resource.
 Comment: Typically, Title will be a name by which the resource is formally known.

Cancel **Save Field**

Edit Tag

3. Enter a value and click Save Field.
4. A Reason text box appears. Enter a reason for the change (optional). The reason you enter appears in the event on the DNX.
5. To add a new tag, select **Add Tag**. The following appears:

Deposits ▾ Submissions ▾ Data Management ▾ Preservation ▾

Advanced Configuration / Add Tag

	<input type="checkbox"/>	Tag Code	Tag Name	Tag Description
1	<input type="checkbox"/>	dc:contributor	Contributor	Contributor
2	<input type="checkbox"/>	dc:coverage	Coverage	Coverage
3	<input type="checkbox"/>	dc:creator	Creator	Creator
4	<input type="checkbox"/>	dc:date	Date	Date
5	<input type="checkbox"/>	dc:description	Description	Description
6	<input checked="" type="checkbox"/>	dc:format	Format	Format
7	<input type="checkbox"/>	dc:identifier	Identifier	Identifier
8	<input type="checkbox"/>	dc:language	Language	Language
9	<input type="checkbox"/>	dc:publisher	Publisher	Publisher

<Back **Select**

Add Tag

6. Select a tag and click **Select**. The new tag is added to the list of tags.

Adding or Editing Source Metadata

The Rosetta Web editor allows you to add and edit metadata from original IEs, representations, or files when the metadata format does not conform to the standard Dublin Core used in most parts of the Rosetta system. This protects the integrity of the original metadata, which can be compromised when mapping to an often simpler DC format. To add and edit source metadata:



1. From the Metadata tab of the Web editor, click the Add Metadata button. The first step of the Add Source Metadata wizard opens.

Add Source Metadata Wizard - Step 1

2. To insert new metadata by entering text, select the Insert new (empty) option. To upload an existing metadata xml file, select Insert from PC. The wizard prompts you to select your metadata type from a drop-down list.

Step 2 of the Add Source MD Wizard

If you selected the option of inserting an existing XML file from your PC, there will be an additional field for you to browse to the file on your PC and upload it.

3. For either selection, click the Edit Metadata button. The page opens to Text View.

Text View

To display Grid View, click Grid.



The screenshot shows the Rosetta Web Editor interface. At the top, there is a breadcrumb trail: "Data Management: Search for Objects / Details". Below this is a metadata table:

MID	56786	Metadata Type	source:mar	Description	desc
Created by	admin1	Creation Date	9/25/19		
Updated by	admin1	Update Date	9/25/19		

Below the table are two tabs: "Text" and "Grid". The "Grid" tab is selected. In the center, there is a window titled "marc:record" containing a form with two fields: "marc:id" with the value "12234" and "comment" with the value "fdsafdsafdf". To the right of the main editing area is a vertical menu with several options: "Add Subelement", "Add Attribute", "Add Nodes", "Add Element", "Add CDATA", "Add comment", and "Add Top Element". Each of these options has a dropdown arrow. The dropdown menus for "Add Subelement", "Add Attribute", and "Add Top Element" are open, showing a list of MARC element types: "marc:leader", "marc:controlfield", and "marc:datafield".

Grid View

4. You can add tags by clicking the tag types on the right side of the page. Add or edit the text. When you are finished, you can click the Validate button to check the XML. Rosetta displays any errors under the Error Message Report tab.
5. Click Save.

The source metadata is saved to the Rosetta repository. From there, it can be:

- viewed through the Delivery module after an administrative user has edited the relevant XSL file(s); see the Delivery XSL section of the Configuring Delivery chapter of the Rosetta Configuration Guide.
- published using a converter installed as a plug-in. Rosetta supplies one that converts source metadata in MARC XML format. This converter is available through the Developer's Network and Rosetta staff can use it to develop their own plug-in.

Adding a Logical Structmap

You can use the Rosetta Web Editor to add logical structmaps to representations.
To add a logical structmap to a representation:

1. In the Web Editor, select the representation to which you want to add the structmap.
2. Select the Metadata tab and click Add Metadata.
3. To insert new metadata by entering text, select the Insert new (empty) option. To upload an existing metadata xml file, select Insert from PC.
If you selected the option of inserting an existing XML file from your PC, there is an additional field for you to browse to the file on your PC and upload it.
4. Select Structmap from the drop-down list, and click Edit Metadata. The page opens to Text View.
Rosetta displays the physical structmap as a template for you to create a logical structmap.



Data Management: Search for Objects / Details

MID	Metadata Type	mets_section.structMap	Description	desc
Created by	Creation Date	8/18/16		
Updated by	Update Date	8/18/16		

Edit Select Insert Text Grid

```

1 <mets:structMap xmlns:mets="http://www.loc.gov/METS/"
2   ID="" TYPE="LOGICAL">
3   <mets:div LABEL="Preservation Master">
4     <mets:div LABEL="Table of Contents">
5       <mets:div LABEL="door.jpg" TYPE="FILE">
6         <mets:fptr FILEID="FL1005" />
7       </mets:div>
8     </mets:div>
9   </mets:div>
10 </mets:structMap>

```

Validate Cancel Save

Add Structmap – Text View
To display Grid View, click Grid.

Home / Data Management / Search and Manage Queries / Search for Objects / Text Full View

MID	Metadata Type	mets_section.structM	Description	desc
Created by	Creation Date	8/15/16		
Updated by	Update Date	8/15/16		

Edit Select Insert Text Grid

mets:structMap

(x) mets:ID (x) mets:TYPE LOGICAL

mets:div

(x) mets:LABEL Preservation Master

mets:div

(x) mets:LABEL Table of Contents

mets:div

(x) mets:LABEL door.jpg (x) mets:TYPE FILE

mets:fptr

(x) mets:FILEID FL1002

Validate Cancel Save

Add Structmap – Grid View

- You can add tags by clicking the tag types on the right side of the page. Add or edit the text. When you are finished, you can click the Validate button to check the XML. Rosetta displays any errors under the Error Message Report tab.
- Click Save.
The structmap is added.

Name	Type	Mid		
DNX	DNX	DNX_REP1004	Edit	
METS Section	Structure Map	REP1004-1	Edit	Remove
METS Section	Structure Map	REP1004-2	Edit	Remove

Added Structmap

Click Edit to edit the structmap and Remove to remove it.



Generating a Logical StructMap

A logical <structMap> can be generated for a representation using the Generate Logical Structmap task. The generated structMap will be based on the content of each file's fileOriginalPath DNX value, with a forward or backward slash as a delimiter (the file name is ignored).

The tasks parameters are as follows:

Task Parameters

Parameter	Description
Preservation Type (required)	The preservation type of the representation for which the structMap is to be generated.
Replace existing	Replace existing logical structMap(s) with the newly-generated structMap(s). (Default = no; if yes, all existing logical structMaps in the representation are replaced.) <ul style="list-style-type: none">• Objects will be tarred or flat based on the export_flat general parameter value. Refer to the General Parameters section in the System Administration Guide for further information.• This task can be added to an enrichment task chain.

If the folder of streams is flat (that is, if all files in the representation have the same fileOriginalPath), no logical structMap will be generated since this is the equivalent of a physical structMap.

Editing a Physical Structmap

You can use the Rosetta Web Editor to edit physical structmaps of representations.

To edit a physical structmap:

1. In the Web Editor, select the representation whose structmap you want to edit.
2. Select the Metadata tab and click Edit for the METS Section.

MID	REP1004-1	Metadata Type	mets_section:structMap	Description	
Created by	admin1	Creation Date	8/21/16		
Updated by		Update Date	8/21/16		

Structmap Type:

Structmap - Label: Root - Label:

Order	File Name	Path	Label
▼	LZW_TIFF.tif	LZW_TIFF.tif	<input type="text" value="LZW_TIFF"/>
▲	Copy of LZW_TIFF.tif	Copy of LZW_TIFF.tif	<input type="text" value="Copy of LZW_TIFF"/>

Edit Physical Structmap

3. Edit the Structmap Label, Root Label, and file label.



The edited labels now appear in the viewer.

Exporting Objects

Objects can be exported out of the Rosetta system to expedite their editing or review. The export function copies information as described in the following table:

Export Rules

Object Type	Objects to Export
IE	All representations and files in the IE are exported to an exports directory on the server.
Representation	The representation and all of its files are exported to an exports directory on the server. The export function exports the linked IEs and representations, but does not export any other representations in the IE.
File	The file is exported to the user's hard drive or to an exports directory on the server.

The exported files are structured according to their initial structure when they were ingested into Rosetta. This information is saved in the fileOriginalPath DNX field. If you want to change this information, edit the path in this field. To export an object:

1. Find the IE, representation, or file you want to export by conducting a search of the system.
2. Open the object in the Web Editor. (See [Accessing the Web Editor](#).)
3. Select the IE, representation, or file in the tree view of the Web Editor.
4. Click the down arrow of the Actions drop-down field and select IE Export, Representation Export, or File Download, depending on your object type. Then click Go.

The system generates an export process and prompts the user for an export path and other export task-related parameters.

If the enforce_ar_export general parameter is set to true, Access Rights will be enforced during export. Certain representations, or the entire IE, may not be exported, in accordance with the IE/REP AR policies.

5. Log on to the server (if necessary) and locate the exported item in the directory specified.

AIP Export

You can export an AIP using the AIP Export task. This task exports the IE together with previous versions, associated files, and shared metadata. You can configure a task chain and add this task to it from Administration > General Task Chains. The AIP Export Task has the following parameters:

- Export Path – The location to place the AIP. The path is relative to the IE Export path (../operational_shared/staff_work_area/{username}/export).
- Preservation Type filter – select a preservation filter.
- Include Shared Metadata – select to add a shared folder under the IE and include all versions of all shared metadata (AR, RP, CMS) for all levels (IE/representation/file).
- Compress – select to create a tar.gz archive for each exported IE folder.



- Ignore Missing data – select to export the IE even when data is missing from the file system. A warning message is written to the server log and the IE will be exported with all available data. When this checkbox is cleared, no data from the IE is exported and the IE is sent to the process exception queue.

Commit or Rollback Changes

When you have made changes to an object, you must indicate to the system that you want to save (commit) those changes or discard (roll back) them. Once you commit, the object will be saved as you determined and unlocked, and the object will be returned to the permanent repository.

To commit or roll back changes to an object:

1. From the Web Editor page of your object, select the object (IE, Representation, or File) in the tree view.
2. In the Actions drop-down menu, select Commit Changes to save the changes you have made or Rollback Changes to save the previous version of the object (without the changes you just made).

If you do not see the options for commit or roll back, click Lock Object from the Actions drop-down menu, then click Go and wait for the page to reload.

3. Click the Go button.
The system commits or rolls back your changes. The Web page reloads with the following message appearing in red text:
“Currently Being Committed/Rolled Back By: Me. Refresh Page.”
4. Click Refresh Page to continue working on this IE.



Managing Full-Text

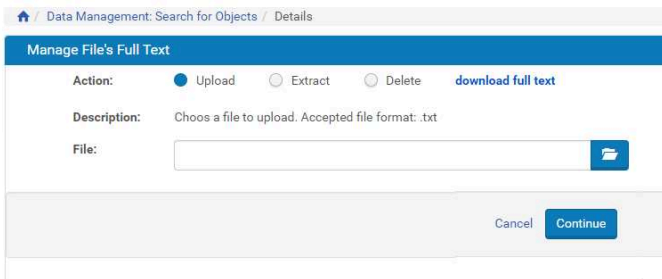
Managing Full-Text

You can manage full-text files in Rosetta and perform the following actions:

- Extract a full-text file from a digital file
- Upload a full-text file for a digital file
- Delete a full-text file that is associated with a digital file

To Manage full-text files in Rosetta:

1. Select a file from the web editor and select Manage Full-text from the drop-down list. The following appears:



Managing Full-Text

2. To upload a new full-text file or replace an existing full-text file for the digital file, select Upload and select the file that you want to upload. The file must have the .txt extension.
3. To extract full text from the digital file, select Extract. This runs the Extract Full Text Task Chain and task for the digital file to extract the full-text.
4. To delete a full-text file associated with the digital file, select Delete. This runs the Delete Full Text Task Chain and task for the digital file to delete the associated full-text file.
5. Click Continue.

Rosetta performs the action you selected.

To download the full-text file associated with a digital file, click download full text.



Managing Representations

Introducing Representation Functions

Representation functionality extends the life of intellectual entities (IEs) that require modifications for the following reasons:

- The library does not possess the technical resources or applications to render the IEs.
- The library possesses collections of objects in soon-to-be obsolete digital formats.
- Some objects in the library exist in a format that contains a problematic attribute that will not be supported in the future.

Rosetta offers preservation functionalities such as

- adding single or multi-file representations
- ordering files in multi-file representations
- adding representation metadata and provenance information
- updating the file content of a representation in permanent storage.

Rosetta breaks down representations into the following types:

- Preservation Master (PM): the system's preservation copy of an object's files.
- Modified Master (MM): a copy of a PM that has been manually modified.
- Access Copy (AC): a derivative of a PM or MM that has been created (by Rosetta or by an external system) to support greater access (for example, a low-resolution Web browser copy).
- The Preservation Master is mandatory and there can only be one
- The Modified Master is optional and there can only be one
- Derivative copies are not preserved
- Custom preservation types, defined in the Preservation Type code table, are optional and repeatable

The following table describes representation-level activities and the situations in which they are used.

Representation Activities in Rosetta

Activity	When to Use
SIP Processing	During the Enrichment task chain, derivative copies are created and added as new representations.



Activity	When to Use
Preservation Action	Running a preservation action involves creating a new representation (or representations) for each IE in the preservation set.
Derivative Copies	Functionality supports adding an access copy as a new representation through the Web Editor. (See Derivative Copy Representations .)
Ongoing Maintenance	<p>The Editor can add a new representation to a specific IE when:</p> <ul style="list-style-type: none"> Higher quality representations of digitized material (PMs and MMs) need to be added to existing IEs New representations of digitized material need to be added to existing IEs.

Preparing the material and processing the representation vary according to the user's context in the system and the needs of the IE or preservation set. The add representation component receives the material for the new representation and launches the proper process according to the source of the call.

Adding a Representation: Process and Steps

Three stages comprise the process flow for adding a representation:

- [Locking the Intellectual Entity](#)
- [Adding the Representation](#)
- [Processing the Representation](#)

Locking the Intellectual Entity

The Editor must lock the IE before adding a new representation. This is done through the Web Editor Object Summary page for the selected IE (follow the path from SIPs List > Edit IE so the Web Editor opens, or conduct a search of IEs and then open one for editing).

Select Lock Object from the Actions drop-down list, then click Go.

The IE locks, the page is refreshed, and the Actions drop-down menu contains relevant options.

When a representation is added through the Web Editor, the system creates the descriptor file with information about the IE. In this case, a new representation is added to the IE with no relationship to existing representations. Thus there is no source representation.

Users can load files for the first time using the Choose From Server tab in the Web Editor (Add Representation - Load File stage). In this case, the user places files under the home directory. The system is responsible for copying the files to the general Import directory.

Adding the Representation

To add a representation from the Web Editor, access the page containing the object summary for your IE. Make sure the object is locked.

To add a representation:

1. Select Add Representation from the Actions menu and click Go to launch the Add Representation Wizard. Step 1 of the wizard opens.



Intellectual Entity PID IE77295 Created on 23/06/2019 20:46:54 Created by admin1
 Committed on 23/09/2019 17:59:24 Committed by admin1 SIP ID 5975
 Version 7

Please provide details on the representation you are adding

Label

* Preservation Type

Representation Entity Type Representation Code

Access Rights Policy

Cancel Next

Add Representation - Details

2. Enter values in the fields using the following table as a guide.

Add Representation - Step 1

Field	Description
Label	A name for the new representation
Preservation Type	Select the Preservation Type. This field is mapped to the field DNX.generalRepCharacteristics.preservationType IEs must contain one preservation master and may contain up to one modified master. Other types are unlimited.
Usage Type	Mapped to the field DNX.generalRepCharacteristics.usageType
Representation Code	Applies only when the Preservation Type is Derivative Copy. (System ignores entries for master copies.) Default value is None.
Access Rights Policy	Select an Access Rights Policy from the drop-down list of available policies. This policy applies exclusively to this representation.

3. Click the Next button.

If you selected Derivative Copy for your Preservation Type, the system moves you to the final step (2) in the wizard. (Skip the next step of this procedure and the accompanying figure.) If you selected Preservation Master or Modified Master, the Additional Information page opens as Step 2 of the wizard.



[Data Management: Search for Objects](#) / [Details](#)

Intellectual Entity PID	IE77295	Created on	23/06/2019 20:46:54	Created by	admin1
Committed on	25/09/2019 17:59:24	Committed by	admin1	SIP ID	5975
Version	7				

Additional Information

No records were found

Preservation Property: Value:

Provenance Information

Please explain why the need to add/update representation without a preservation plan

Submission Reason:

Add Representation - Additional Information for Master Copies

4. Enter the following information in the available fields:
 - For the Additional Information section, enter values for as many of the available Preservation Properties as you want. Select the property from the drop-down menu, enter a value in the field, then click the Add button. Repeat as needed.
 - For the Provenance Information section, enter information that explains why a new representation is needed.
5. Click the Next button to move to the next step in the wizard. (To return to a previous step or cancel the procedure, click the Back or Cancel button.)
The Load File page opens.



Intellectual Entity PID IE77295 Created on 23/06/2019 20:46:54 Created by admin1
 Committed on 25/09/2019 17:59:24 Committed by admin1 SIP ID 5975
 Version 7

Please select file(s) for new Representation Please choose max File size for upload no more than 1000 MB

Insert from Local PC Choose From Server Load the files manually

Files for upload Change view: Thumbnails

+Add more files

Drop files here...

No files to upload Upload

Order	File Name	Label	Physical Structmap Label	Note	Source	Size	Date
Selected Files							

Back Cancel Done

Add Representation - Load File

6. In the Select File section, use the Insert from Local PC or the Choose from Server tab to browse to the local or server-based source of the file(s) you want to select for preservation.
 - If you are unable to use the applet, you can load the files manually. To do this, click the link to Load the files manually at the top of the Select File section and load the files through your Windows-based file selection.
 - When the Preservation Type value is Derivative Copy, this step will be Step 2 (out of two steps) rather than Step 3 (as pictured here).
7. When you have selected the file(s) for your preservation copy, click the Done button to finish.

The system copies the files under the general Import Directory root.

Processing the Representation

When the Add Representation is called, the system loads the files into Rosetta, runs the Validation Stack, performs Enrichment tasks, and moves the IE to the permanent repository.

While the Add Representation process is running, the system displays status messages indicating the task is in-progress or complete. Any problems identified during the process are sent to the Technical Analyst (TA) Inbox (similar to problems found during SIP processing). This is noted in a message to the Editor, as are any notices of the IE being committed or rolled back. When the Commit or Rollback action is complete, the system unlocks the IE and removes the Import Directory and all of its contents.

- Add Representation is an asynchronous process. Once the Add Representation process is launched, the Editor does not interact with the process. When Add Representation has finished, the system displays a message on the Web Editor page so that the Editor knows to commit or roll back the action.
- If the Editor performed a number of actions on the IE without committing and then Add Representation fails, the



following scenarios are possible:

- If the Editor selects **Commit**, all of the actions on the IE except the failed Add Representation are committed.
- If the Editor selects **Rollback**, all of the actions on the IE performed after the last commit are rolled back.

When the system completes the Add Representation process, it notifies the Editor by e-mail.

Updating a Representation

Rosetta allows you to update existing representations with minimal impact on the AIP and associated objects. Revised representations can replace existing representations without performing enrichment, without copying all related files, and without a preservation plan. Instead, the representation

- maintains its place in the structural map of the object
- updates the content and structure of the representation (not its metadata)
- references related files rather than uploading those same files that are already uploaded with the previous version of the representation

Revisions can be performed on a single representation through the UI (see [Adding the Representation](#)) or as a batch process through one or more APIs. (Information on APIs can be found on the Developer's Network

[\(http://developers.exlibrisgroup.com/rosetta/apis/\)](http://developers.exlibrisgroup.com/rosetta/apis/)

Replacing Files Within a Representation

A single new representation can replace an existing one through a manual procedure in the Web editor. This revised version should be ready for upload when you begin this procedure.

To revise a single representation:

1. Locate the representation or the IE to which the representation belongs. You can use any of the Rosetta search functions that access the permanent repository. (For example, from the Data Management menu, go to the Search and Manage Queries heading and select Search for Objects, then perform a search for the representation you are going to revise or replace.)
2. Open the object in the Web editor and lock the IE.
3. Select the representation you want to revise.
4. The Actions menu changes to provide relevant actions. Select Update Representation and click Go. The first step of the update wizard opens:



Home / Data Management: Search for Objects / Details

Intellectual Entity PID IE77295 Created on 23/06/2019 20:46:54 Created by admin1
 Committed on 25/09/2019 17:59:24 Committed by admin1 SIP ID 5975
 Version 7

Please explain why the need to add/update representation without a preservation plan

Submission Reason

Add New File

File Name	Label	Physical Structmap Label	Size	PID	Edit	Remove	Replace
1 butterfly.jpg	kuku	kuku	172.8	FL124919			

Cancel Submit

Update Representation Page

5. Add a Submission Reason for the update.
6. Click the Add New File button to add a new file. To replace an existing file, click the Replace Action beside the file you want to revise. A lightbox for the update representation opens.

Please select a file to upload

Insert from Local PC
 Choose From Server

* File

Label

* Physical Structmap Label

Notes

Cancel Submit

Light Box Form for Updating a Representation

7. Click the Browse button and select the file you want to upload from a local or network drive.
8. Enter a Label and a Structmap Label for the file and any additional information in the Note field of the form. The Structmap label and Notes fields will be displayed in the Delivery module of Rosetta.
 - New files are appended to the end of the structmap.
 - Only physical structmap labels can be edited. Logical structmap labels are added automatically for new files based on the file name and can be edited separately
9. Click the Add Selected File button.
 The lightbox closes and the new representation displays in the list of files on the Add Representation page.



Data Management: Search for Objects / Details

Intellectual Entity PID: IE77295 Created on: 23/06/2019 20:46:54 Created by: admin1
 Committed on: 25/09/2019 17:59:24 Committed by: admin1 SIP ID: 5975
 Version: 7

Please explain why the need to add/update representation without a preservation plan

Submission Reason

Add New File

File Name	Label	Physical Structmap Label	Size	PID			
1 butter_fly.jpg	kuku	kuku	172.8	FL124919	Edit	Remove	Replace
2 sign_up.png	dragon fly	dragon fly	7.74		Edit	Remove	Replace

Cancel Submit

Update Representation Details Summary

- Enter a Submission Reason (optional) and click the Submit button. Rosetta reloads the IE in the Web editor. The new IE version appears in the object tree in the left column of the page:

Data Management: Search for Objects / Details

Intellectual Entity PID: IE77295 Created on: 23/06/2019 20:46:54 Created by: admin1
 Committed on: 25/09/2019 17:59:24 Committed by: admin1 SIP ID: 5975
 Version: 7

Object Summary Metadata Services Collections Versions

View Object

PID: IE77295
 SIP ID: 5975
 Created on: 23/06/2019 20:46:54
 Created by: admin1
 Updated on: 25/11/2019 12:01:37
 Updated by: admin1
 Entity Type: -
 Number of Reprs: 4
 Status: ACTIVE

Back Actions: IE Export GO

- IE Export
- Commit Changes
- Rollback Changes
- Delete IE
- Add Representation

Representation Updated in Web Editor

- Select Commit Changes from the Actions drop-down menu and click the Go button. The page reloads with a status update and a link for refreshing the page. The object is locked again.

Deleting a Representation

You can delete a representation with any associated files. The master representation cannot be deleted. To delete a representation:

- Locate the representation or the IE to which the representation belongs.
- Open the object in the Web editor and lock the IE.
- Select the representation that you want to delete.



4. Select Delete Representation from the Actions drop-down list.

The screenshot shows a web interface with a left sidebar containing a tree view of digital objects. The main area is divided into two panels: 'Object Summary' and 'Metadata'. The 'Object Summary' panel displays a list of files, with 'Derivative Copy (REP120082)' highlighted in yellow. The 'Metadata' panel shows a table of object details. At the bottom, there is a 'Back' button, an 'Actions:' dropdown menu with 'Delete Representation' selected, and a 'GO' button.

Object Summary	
PID	REP120082
SIP ID	-
Created on	13/08/2019 09:51:35
Created by	admin1
Updated on	13/08/2019 09:51:36
Updated by	admin1
Preservation Type	DERIVATIVE_COPY
Usage Type	VIEW
Representation Code	HIGH
Number of Files	1

Delete Representation

5. Click Go.
The representation is deleted.

