



## Intralex intraLibrary 3.7: Administrator's Guide

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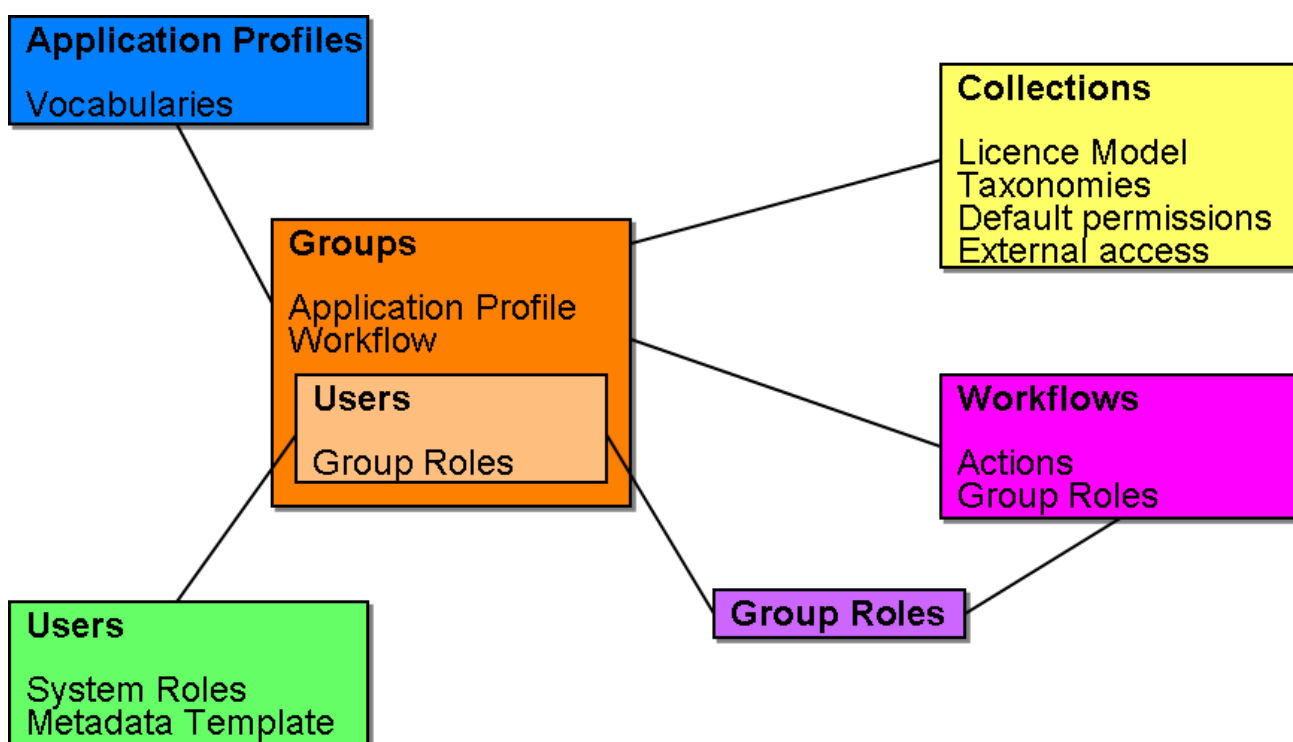
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## 1. Introduction

This document is for intraLibrary administrators carrying out routine administration tasks. For support with decision-making about configuration tasks see the **Configuration Guide**. It is particularly important for administrators to understand the relationships between the different aspects of intraLibrary administration as indicated in the diagram below.



For a more detailed understanding of the relationship between these capabilities see the **Configuration Guide** where this diagram is discussed in detail.

One or more users may have an administration role in an installation of intraLibrary. When they log-in to intraLibrary these users see an extra *admin* button on the main toolbar.

When the *admin* button is selected an additional toolbar becomes available with the following options:

- users;
- system roles
- groups;

- 
- workflows;
  - collections;
  - metadata;
  - vocabularies;
  - search;
  - agreements;
  - licences;
  - system;
  - support;
  - mail;
  - reports.
  - quality marks (if enabled)
  - maintenance
  - harvesting
  - kaltura (if installed and enabled)

This document describes the facilities that are available in the *admin* toolbar, and the issues that must be considered before changing some of the settings.

## 2. Users

The user management functions include, across the top, a set of filters that can be used to search for specific users by name, system role, group, or whether or not they are logged in, as well as setting the number of users per page to be displayed.

### 2.1. Adding new users

The "users" section provides facilities to add, delete and update users.

Users can be created by clicking on the green plus sign beside *Add New User* at the bottom right of the screen. This will display a new window in which you can select the username, password and expiry date of the account. You can also select the groups you wish this user to belong to. Multiple groups can be selected. In addition you can select one or more system role types for this user. The standard system roles are:

**Guest:**

can search and browse the repository, and export resources.

**Contributor:**

can additionally upload, catalogue and publish resources.

**Librarian:**

can additionally delete comments, move resources to workflows or collections, and edit the classification systems.

**Administrator:**

can manage user accounts and configure the system.


It is also possible to allocate users to roles that administrators can configure. See [System Roles](#) for more details on how to set up customised roles.

The local licence for your intraLibrary installation constrains the number of users that can be added in the contributor, librarian and administrator roles.

## 2.2. Assigning Users to Groups


All users are automatically assigned to the *default* group. You only need to assign users to groups if this is not sufficient. You can assign users to specific groups when you first set up their account. To assign users to groups after their account exists you need to [modify the user's properties](#).

## 2.3. Modifying a User's Properties

You can modify a user's properties or simply view their properties, such as their group membership, by clicking on the edit properties icon  to the right of each user's details in the table.

This allows the administrator to modify any of the settings available when the new user was created.

## 2.4. Mimicing a User

An administrator can log in as any other user by clicking on the user profile icon . This



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can be very useful to verify any conditions reported by a user and see the issue from the user's point of view.

## 2.5. System Settings for Users

In the [System "user options" area](#) the administrator can choose a number of general configuration options that will affect users.

## 2.6. Automatically assigning users and groups

If you have an external authentication system that stores user names and passwords it may be possible to use that to authenticate users. In that case, as a new user logs in for the first time their intraLibrary account will be set up automatically. If the external authentication system contains information which can be used to create rules for assigning users to groups then each user can also be automatically assigned to groups when they first log in. In certain circumstances these assignments can be checked each time a user logs in and updated as necessary. For more information on which external authentication systems can be supported and how a rule set can be set up please contact Intrallect.

## 3. System Roles

IntraLibrary comes with four standard built-in roles: Guest, Contributor, Librarian and Administrator. Each of these roles has a set of privileges available to users in that role. If these four roles do not match the privileges you would like users to have then you can create your own roles and allocate these to users. These roles are described as *system roles* since they apply to all aspects of the system. This also helps to avoid confusion with *group roles* which only apply to people within defined groups.

To create a new system role select a *role type* which has greater privileges than your intended new role and select only the privileges you want this new role to have.

The full set of privileges available are:

	Role type:	Ad	Li	Co	Gu
Action	Description				
Configure	Allows the user to generate and manage RSS feeds	Y	Y	Y	Y

RSS feeds	based on searches they have carried out. Appears to the top right in the form of a small orange icon of any results listing.				
Move resource to workflow	Very powerful action that allows the user to move a resource into any group/workflow. Recommend that this be switched off for nearly all users. Appears on resource page in the Things you can do with this resource panel (Move).	Y	Y	Y	
Edit taxonomy	Allows the user to edit the classification schemes that are used in browse library. This includes being able to import ZTHES taxonomies. The edit function is available at the top of the browse interface.	Y	Y		
Delete a comment	Allows the user to delete comments that other users have made against a resource. This function sits beside the individual comments found at the bottom of a resource details page.	Y	Y		
Change resource collections	Same behaviour as the workflow action with the same name. You can change the collection(s) that the resource belongs to. This allows you to assign resources to any collection in the repository, so this is very powerful functionality. Use with caution! Appears on resource page in the Things you can do with this resource panel (Move).	Y	Y		
View workflow status	Allows the user to see where a resource is in a workflow (if it is one). Also says whether it is reserved or not. Also says collection membership and the workflow history of the resource can also be seen. Available on the resource page in the Things you can do with this resource panel (Workflow).	Y	Y		
Unreserve resources	If the user finds a resource that is reserved by another user then they can unreserved it. This can happen in two places. The first is in My Basket. The second is only available if the View Workflow Status functionality is switched on for the same user (see above); it is available in the resulting panel.	Y	Y		
Find unpublished resources	Allows the user to find resources that have not yet been published. This is available in both the advanced search and browse interfaces in the form of a checkbox at the top left of the screen (below the navigation).	Y			

Find resources from all collections	Allows the users to find resources in all collections, even if they do not have find access for all of them. This is available in both the advanced search and browse interfaces in the form of a checkbox at the top left of the screen (below the navigation).	Y			
Delete resource	Can delete any resource that is found. Note that if a resource is reserved by another user then the resource will have to be unreserved before it can be deleted (see the Unreserve function above). The delete function is available in the Things you do with this resource panel on the resource page.	Y			
Login as another user	Allows the user to login as another user (even if that account relies on external authentication). This is available in the user management interface so this also needs to be available for this to work (see configure users below)	Y			
Configure users	Allows the user to access the user administration screen (found in the Admin area). Users can be added, edited or deleted here.	Y			
Configure general admin	Gives access to a number of miscellaneous admin functions found under the following links under admin: System, Support and Mail. Inline help describes these sections in detail.	Y			
Configure cluster	These facilities only exist when intraLibrary is running in a clustered environment.	Y			
Harvest resources	Configure the harvesting of metadata for resources from external repositories to intraLibrary collections.	Y			
Configure licences and usage agreements	Gives access to the legal aspects of the system found in the admin section. There are separate links for agreements and licences. Note that any licence models need to be introduced to the system through a SQL script.	Y			
Configure groups	Access to group management. Add, edit and delete groups. Can assign users to groups. Can also create and assign group roles (needed for workflows)	Y			
Configure collections	Access to collection management (found under admin). Add, edit and delete collections. Access between groups and collections is managed here, as well as external access to resources.	Y			

Configure workflows	Configure workflows including use of the workflow editor to create and modify workflows.	Y			
Configure reports	Allows the user to generate reports based on the metadata of resources held in the repository. This page also gives some useful stats about the system. Found in the admin section.	Y			
Configure metadata and vocabularies	Allows users to edit application profiles including associated vocabularies. Available in the admin section under the sub sections Metadata and Vocabularies	Y			
Configure search	Allows the user to configure the various searches; simple search, advanced search and reference searches. Available in the admin section under the search sub-heading	Y			
Configure system roles	Controls access to the page that allows you to configure all the actions described in this document. Always keep at least one role with this function otherwise you will be locked out of this functionality. Found in admin section.	Y			
Configure quality marks	Allows the user to create, edit and delete quality marks in the system. Note that even for administrators this is not on by default.				
Configure Kaltura	Allows the user to configure the integration of intraLibrary with the kaltura video streaming and transcoding service. This is available only if Kaltura is installed and configured in the intraLibrary properties file.	Y			

Configuring Kaltura is an example of how intraLibrary can be integrated with other third-party applications. Please contact Intrallect for details of other available third party applications.

Once you have created a new role it will be available each time you allocate a user to a role either when you first set up a new user or when you edit the properties of a role.

## 4. Groups and Workflows

### 4.1. Introduction

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It is hard to separate the functions of groups from workflows as the two are tightly linked, so they will both be treated together. First the concepts of the submission workflow are described then how to configure a workflow including setting up particular groups of users with particular roles. It should be stressed that intraLibrary has a default workflow which many people will find satisfies their needs and if that is the case there is no need to read this section.

Several new terms will be introduced in this section so it is useful to start with some definitions:

**submission workflow**

The process of uploading a resource into intraLibrary and preparing it to ensure that all necessary information is provided and checked.

**stages**

The submission workflow can be divided into several stages (typically one to four stages). Stages occur sequentially in a workflow.

**completion criteria**

A resource is unable to move from one stage to the next until it has satisfied all the completion criteria for that stage.

**stage transitions**

When a resource moves from one stage to the next a stage transition occurs. This transition can be used to trigger events.

**group member**

Users may be assigned to (i.e. become members of) one or more groups. Each group is assigned one submission workflow. Any workflow can be assigned for use by several groups.

**group roles**

A group member can be given a specific role in that group. Roles can be named by the administrator. A user can have different roles in different groups. Group roles are used to give users access to workflow processes.

**group alert**

When a resource undertakes a stage transition a group alert may be sent. A group alert takes the form of an email sent to all users involved in the next stage.

**workflow processes**

Within a single stage of a submission workflow there can be one or more processes. If more than one process exists then these processes can be carried out in parallel. Processes are defined by grouping together a number of workflow actions which can

be used to complete that process.

### **workflow actions**

Workflow actions are predefined (such as upload, import, edit metadata, or preview resource) and are associated with a workflow process. A complete list of all workflow actions is provided in the section [Workflow Actions](#).

### **available**

Resources are available, and can be seen in the available section of the work area, when a user can work on them. Only resources at a stage of a workflow for which the user has been assigned a role will be visible. Users can elect to work on any resources in the available area by reserving them.

### **reserved**

When a user reserves a resource it appears in the reserved section of that user's work area and becomes unavailable to other users, though they can see that the resource exists and who has reserved it. If the user is the only person with access to a particular stage in a workflow, resources in that stage will automatically go to the reserved area.

## **4.2. Submission Workflow**

A submission workflow defines the steps that a resource passes through as it is uploaded, catalogued and published into the repository. IntraLibrary has a highly configurable workflow. It enables complex, multi-role workflows to be defined, whilst still supporting the simplicity of a single-stage workflow where appropriate.

### **4.2.1. Properties of a Workflow**

The progress of a resource through its submission to the repository is defined by the stages of the submission workflow. When a resource progresses through a workflow, stage transitions can trigger certain events, such as a change in the resource's published state and sending alerts to users with relevant workflow roles. When resources are moved in a workflow, they are moved to a particular stage, such as being sent back to a previous stage for clarification, or progressing to the next stage for classification.

Each stage of a submission workflow can have one or more workflow processes assigned to it. This means parallel processes can be defined, so users in different roles can potentially access the resource at the same stage, and do different things to it. The things that can be

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done to a resource are known as workflow actions. The list of available actions is given below.

Group members can be assigned one or more roles in a submission workflow. A role can be associated with one or more processes in the submission workflow. This flexible arrangement means it is possible to create a variety of different ways for people to collaborate in a submission process. It anticipates the need for users in the system to contribute to the submission of resources in more than one way, and the need for special users who have access to most or all of the workflow.

To summarise the properties of a submission workflow:

- A workflow consists of several stages.
- Each stage can have one or more processes that can be accessed in parallel.
- Any group role can be given access to one or more workflow processes (multiple group roles can be defined for a group of users).
- Each workflow process can include one or more predefined actions which are made available to users in the relevant role(s).
- Some workflow actions can be configured to require completion within a workflow stage before the resource can be moved to the next stage.

#### 4.2.2. Properties of a Workflow Stage

As described above, it is a property of every workflow stage, that all users who have access to that stage will receive email alerts when resources arrive in that stage (although the users can configure this themselves in their "profile"). A workflow stage can have the following additional properties.

Property	Description
Change publish state	The publish state of the resource will change when the resource has passed through the stage. By default, resources are not published when they enter the first stage of a workflow, even if they were published before they entered the workflow. Setting this property at any stage, including the first stage, causes the resource to be published so it can be seen by other users. Each further use of this property toggles the published state of the resource.
Email addresses to alert	Emails can be sent to supplied addresses when a resource has been published. This feature is designed for sending

	<p>alerts to external entities, such as mailing lists. The email addresses to be alerted can be set at the bottom of the Mail tab in the Admin section.</p> <p>Alert message configurable by modifying the email template "stageChangeExternalUserEmail.txt". See <a href="#">Email Templates</a> section for more information.</p>
Complete on any	Where a workflow stage has more than one process, by default all processes must be completed in order to move the resource to the next stage. Setting this property means that the resource may be moved to the next stage by completing only one process in the stage.
Alert next stage members	<p>Group members with a role in the next stage will be automatically alerted when the stage transition occurs. This is to allow the group members to be alerted when some action is expected.</p> <p>Alert message configurable by modifying the email template "stageChangeObjectOwnerEmail.txt". See <a href="#">Email Templates</a> section for more information</p>

### 4.2.3. Workflow Actions

There is a set of predefined actions that are available to be included in any workflow process. Some actions may have [completion criteria](#) such as conformance to a subset of an application profile, or matching one of a set of licence patterns.

Action	Description	Additional Parameters
Assign quality mark	Assign a specified quality mark to the resource.	Quality mark ID
Change collections	Modify which collections the resource is a member of. User can put the resource in any collections they have contribute access to.	
Delete	Remove a resource completely from the system.	
Edit metadata	Metadata / classification editor configured by the chosen Application Profile, and an optional metadata subset.	Metadata Subset. See <a href="#">Metadata Subsets</a> section.



Edit rights	Licence (rights management) editor.	
Export	Package export functions.	
Import from filesystem	Import a file or content package from the group's folder on the server filesystem.	
Import from harvest	Set up a harvest activity that will harvest metadata from a specified external repository and continue to update the harvest on a daily basis.	
Kaltura upload	Upload a file to Kaltura establishing its metadata record in intraLibrary. This is an example of a third party action available only when a third party application is installed and enabled.	
Link resources	Link a resource to any other resource by populating the LOM Relation fields for both resources. All resources must have the correct LOM field and vocabulary assigned in the relevant application profile, and must have title and LOM identifier fields populated.	
Move resource	Send the resource to another stage of the workflow, with comments attached. Typically used at review stages.	Stage ID
Overwrite	Upload a new version of a resource to the system. New version has same metadata as old resource. The exception is if a new title has been entered at upload or imported in a content package.	
Preview	Package/file preview.	
Review	Review a resource and make comments on it so that others can act on your review at a later stage.	
Save manifest to filesystem	Write a package manifest to a folder on the server filesystem. Folder location is a property of the workflow process.	Path of folder on server filesystem.
Save to filesystem	Write a content package to a folder on the server filesystem.	Path of folder on server filesystem.
Transfer	Move the resource into a different workflow stage or different group. User can move the resource to any group/stage they have access to.	
Upload	Upload or add a new resource to the system.	

View Metadata	Metadata preview.	
View Reviews	Read (and take action as a result of) all reviews that have been written by reviewers of the resource	

#### 4.2.4. Process Completion Criteria

As mentioned above, some workflow actions may have criteria that need to be met before the process can be completed. In the user interface, the process completion button will be greyed out if these criteria have not been met. The user can still click on the button, but instead of marking the process as complete, it will display details of the completion criteria that have not been satisfied.

Process completion criteria are associated with specific actions. There are currently four actions which have process completion criteria:

- Edit Metadata
- Edit License
- Save Package to Filesystem
- Save Manifest to Filesystem

The following paragraphs give details of the process completion criteria for each of these actions.

The process completion criteria for the "Edit Metadata" action are driven by the [application profile](#). This can be the whole application profile, or a part of the application profile defined in a metadata subset for a workflow process. If the "Edit Metadata" action is included in a workflow process, the metadata record must meet the conditions of the application profile and any metadata subset, before the workflow process can be completed.

The conditions that can be imposed by an application profile include:

- Completion of all mandatory fields, such as "Title", "Description", "Contributor". NB: If a metadata subset has been defined for the workflow process, only the mandatory fields that are included in the metadata subset must be completed to meet the completion criteria for that process.
- Use of the vocabularies required for certain fields.

The process completion criteria for the "Edit Licence" action are driven by the [licence model](#). If the "Edit Licence" action is included in a workflow process, the licence information must

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match one of the licence patterns in the licence model before the workflow process can be completed.

The conditions that can be imposed by a licence pattern include:

- Matching the fixed properties of a particular licence.
- The completion of certain fields, such as "Resource Owner".
- Particular values being stored in certain fields.











The "Save Package to Filesystem" and "Save Manifest to Filesystem" actions both have only one process completion criterion. The user must have performed the action before the process can be completed. In technical terms, these two actions have a "state", i.e. the system remembers whether or not the user has performed that action.


If a workflow stage has more than one process defined, and more than one of these processes has completion criteria, then all of the completion criteria for all processes in a stage must be met before a resource in that workflow can be moved to the next stage.

#### **4.2.5. Editing Workflows**

The built-in workflow editor is the most convenient way to create and edit workflows. (It is also possible, though not recommended, to create workflows as XML files and import them. Please contact Intrallect for further information on the workflow XSD.)

In the Workflows section of the Admin tools all available workflows are listed. The list below is an example but the actual list of workflows will vary depending on which workflows have already been created.

Workflow	
Default	
BCU Moodle	
BCU IntraLibrary	
Getty Images	
Approval	
Quality Evaluation	
Default plus Kaltura	
Research workflow	 
<b>Create new workflow</b> 	

When a workflow is in use, that is, it is assigned to a group, it cannot be modified or deleted. (One exception to this is that group roles can be changed while a workflow is in use.) In this case the properties icon  will show details of the workflow but these details cannot be modified.

When a workflow is not in use it can be edited or deleted. In this case the workflow will also show a delete icon. Clicking in the properties icon for these workflows will open them in an editable mode.

You can create a new workflow by clicking on the green cross at the bottom right of the workflows list.

### 4.2.5.1. Creating a New Workflow

This section presents a step by step guide to creating a new workflow starting from when you click on the green cross.



---

Create a new Workflow ✖

Workflow Name


Workflow Description

First you need to choose a name and description for the workflow. Then click on *Submit*. You will then see the heading for your new workflow as shown below:

**My new workflow**  

A demonstration two stage workflow

**Workflow Status:** *Not in use*

+ 



Now, to create the first stage of your workflow, click on the green cross and provide a name and description for this stage. Then click *Submit*.

Create new workflow Stage for Workflow: My new workflow ✖



Stage Name





Stage Description

Now you will see that your workflow has the first stage included. Click on the green cross in this stage area to add a process to this stage.

My new workflow  


A demonstration two stage workflow  
**Workflow Status:** *Not in use*

Stage    

First stage 1

A process is the part of the workflow that contains a set of actions and the roles that can carry out those actions. Give this process a name and description and then click *Submit*.

Create new workflow Process for Stage: First stage 

Process Name

Process Description

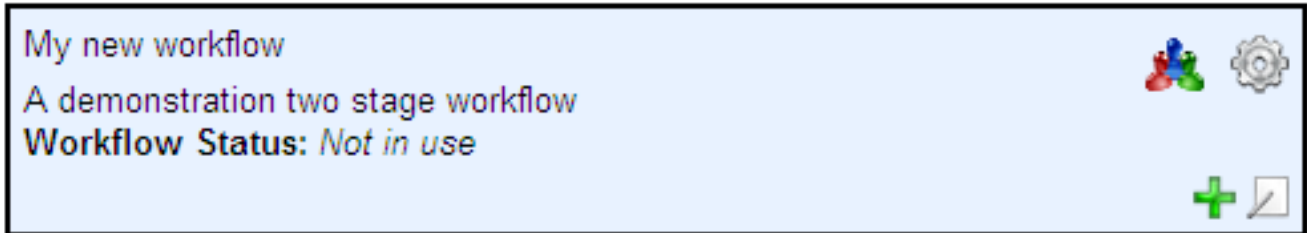
Now the workflow has a single stage containing a single process. Before you move on please repeat these steps to add a second stage containing a single process.

---

My new workflow

A demonstration two stage workflow

**Workflow Status:** *Not in use*

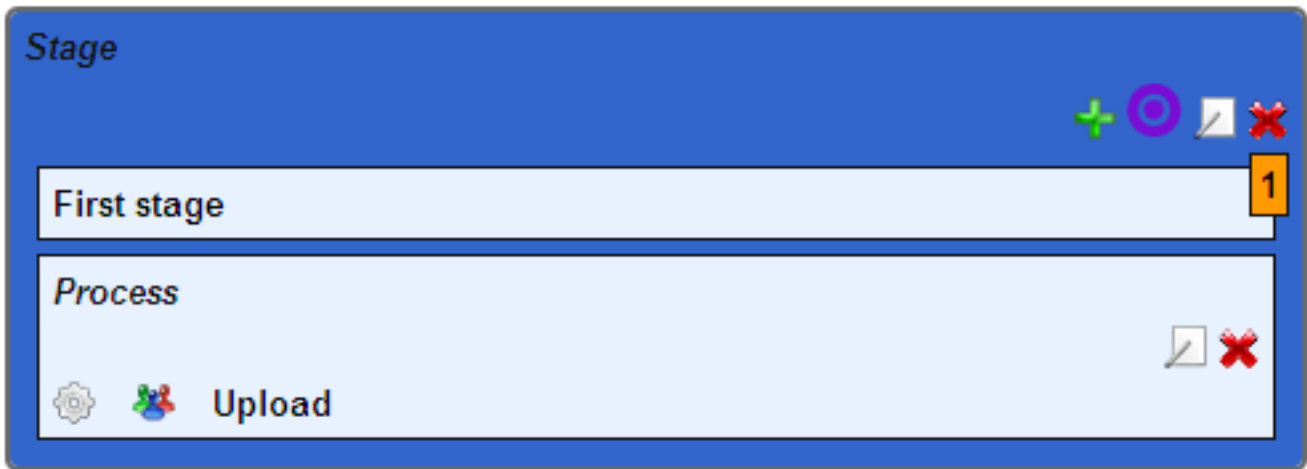


Stage

First stage 1

Process

Upload

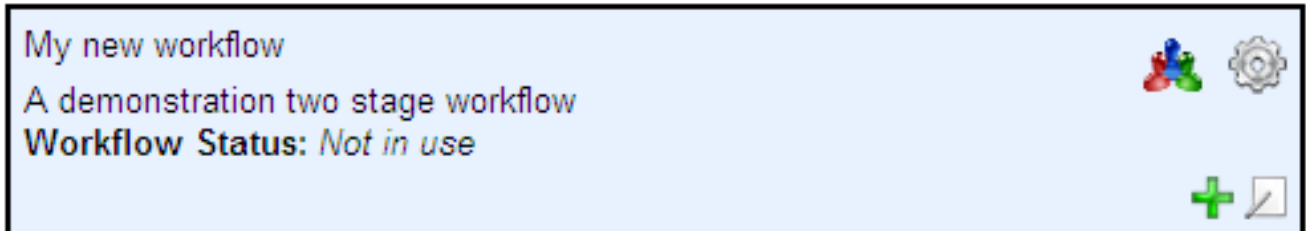


In this example we want to *Publish* the resource when the first stage has been completed and before the second stage starts. To toggle the publication stage click on the *target* icon indicated below. Note that there are two of these icons and you need to click on the one in the first stage.


My new workflow


A demonstration two stage workflow

Workflow Status: *Not in use*



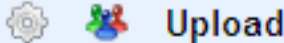
Stage

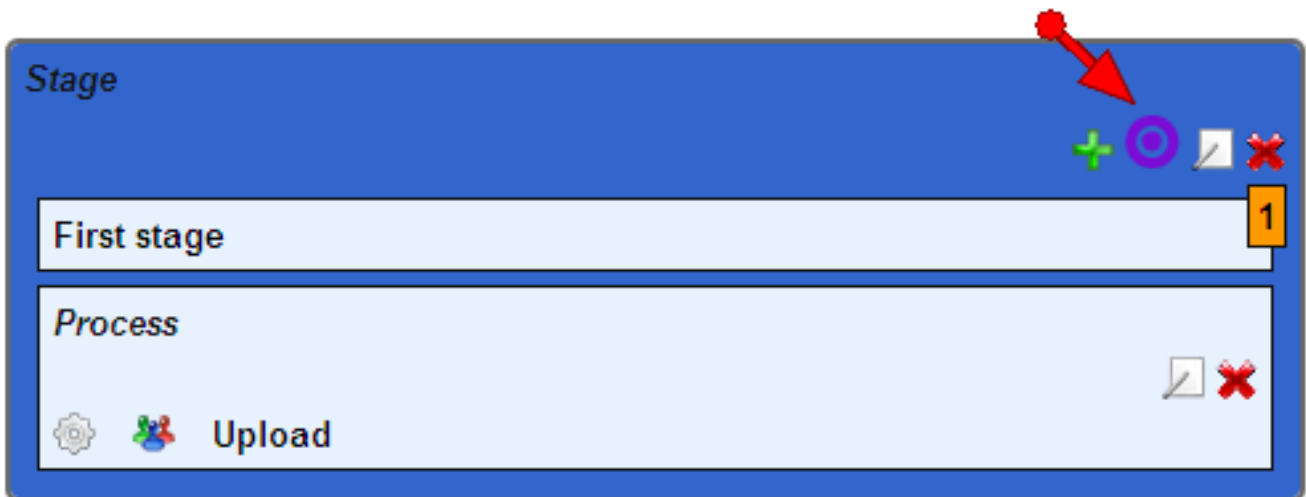





First stage 1

Process



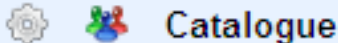


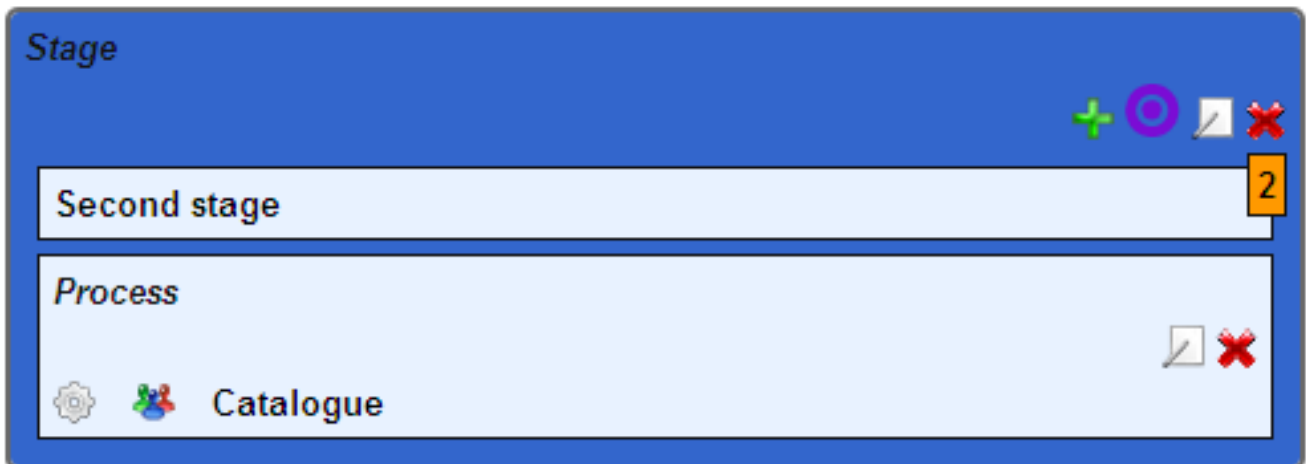
Stage



Second stage 2

Process





Now the workflow shows that the resource will be published after the first stage of the workflow.

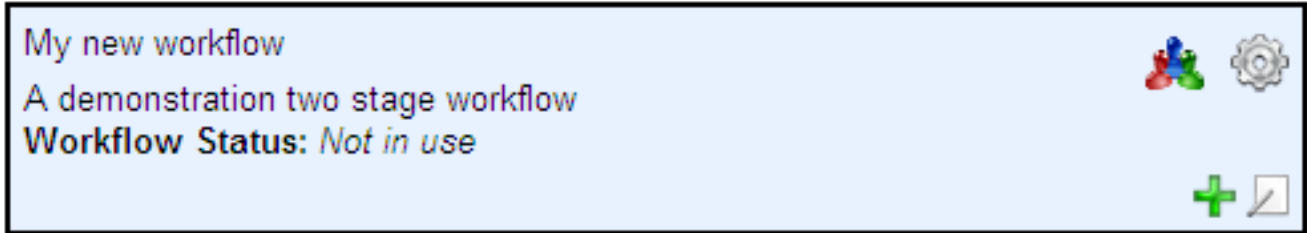


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My new workflow

A demonstration two stage workflow



**Workflow Status:** *Not in use*

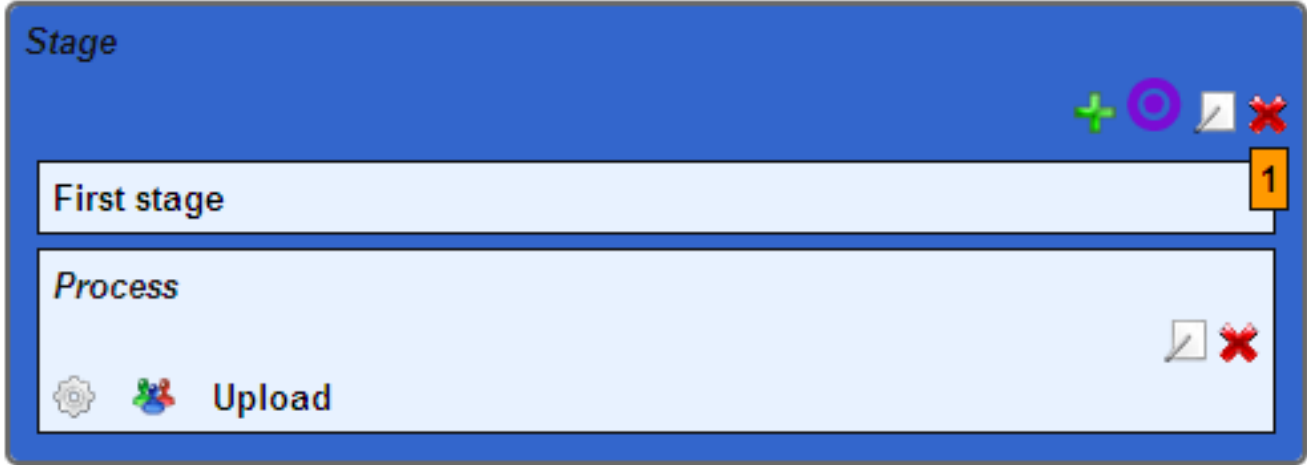


Stage

First stage 1

Process

  Upload





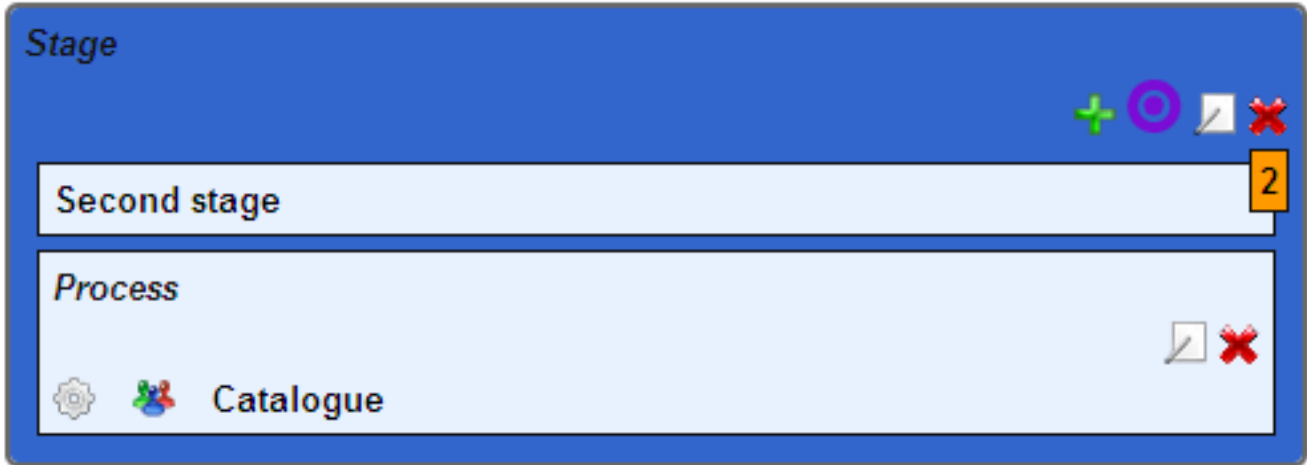
Publish

Stage

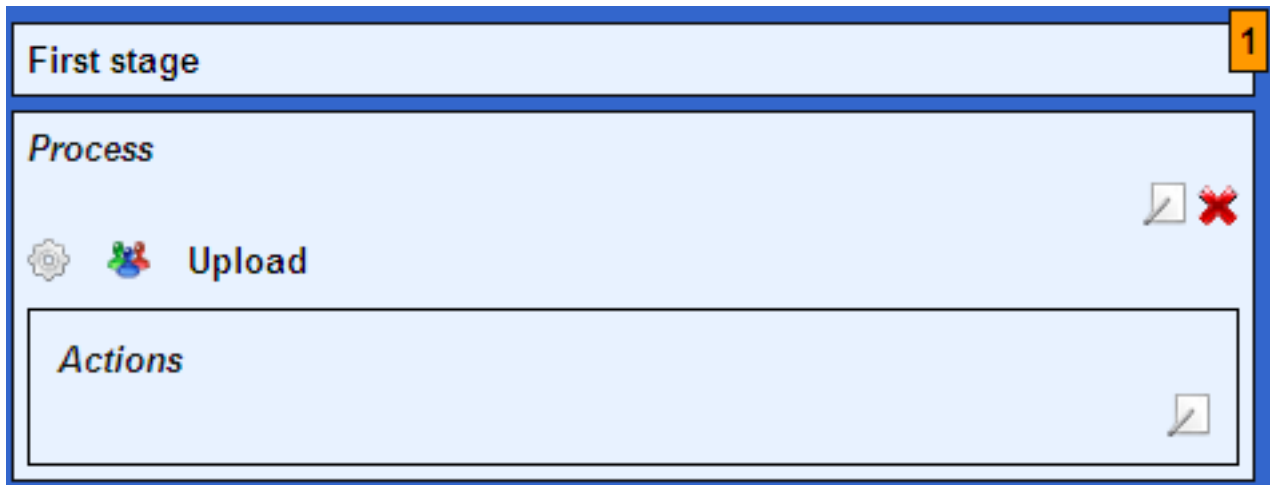
Second stage 2

Process

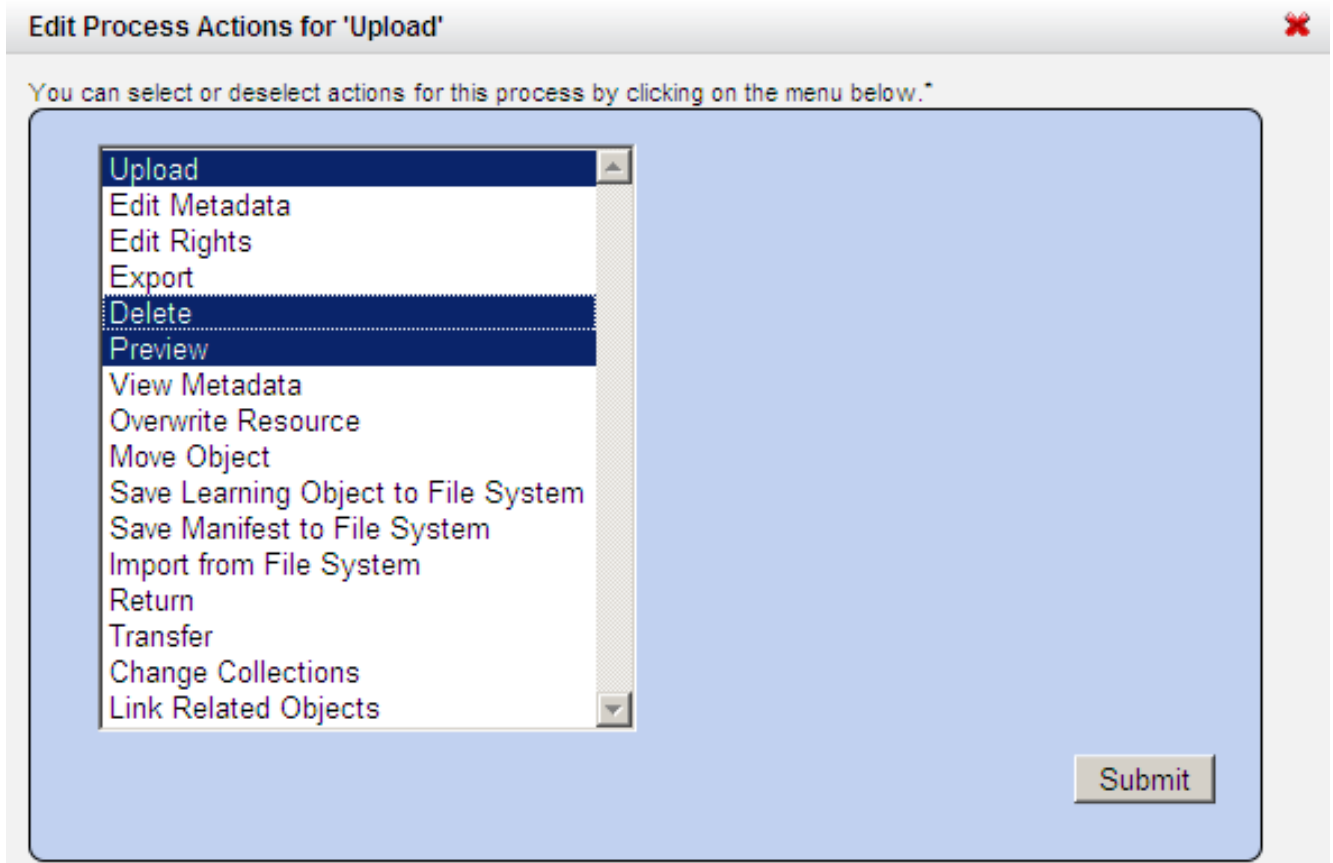
  Catalogue



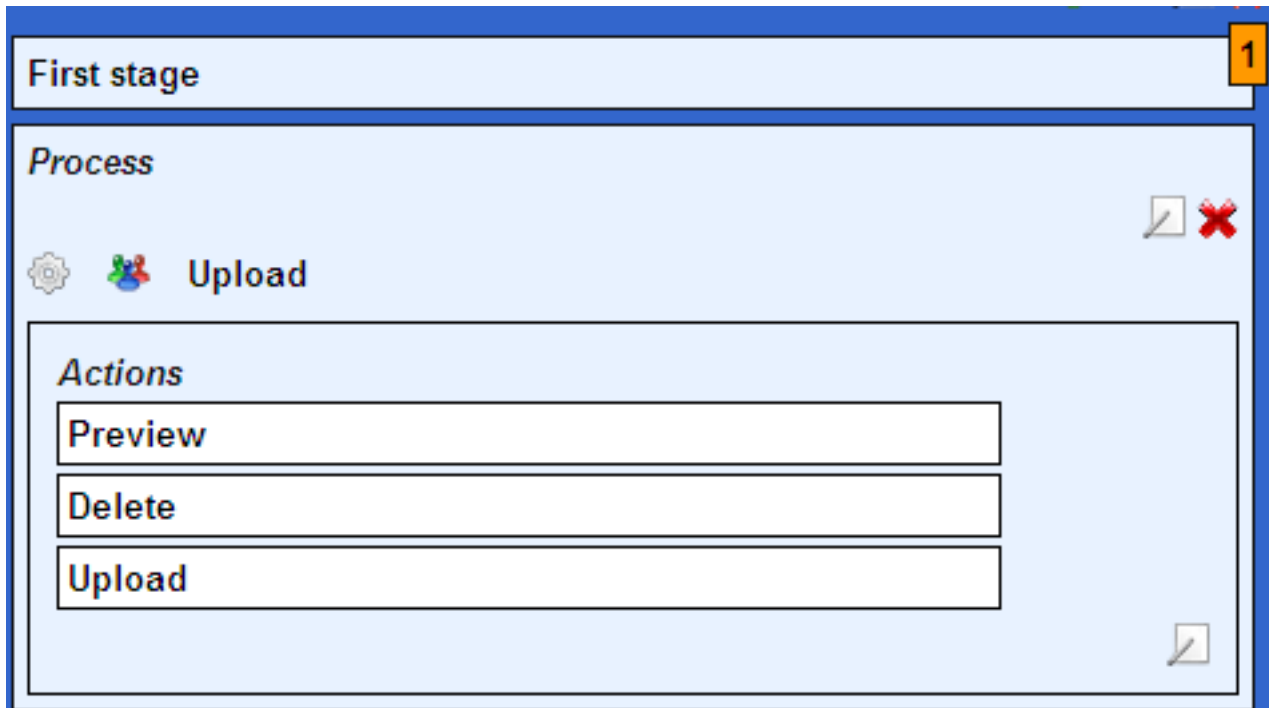
The next step is to add some actions to the process in the first stage. Click on the cog wheel at the left in the process box of the first stage. An *Actions* box will appear with a small *edit properties* icon inside on the right. Click on this icon.



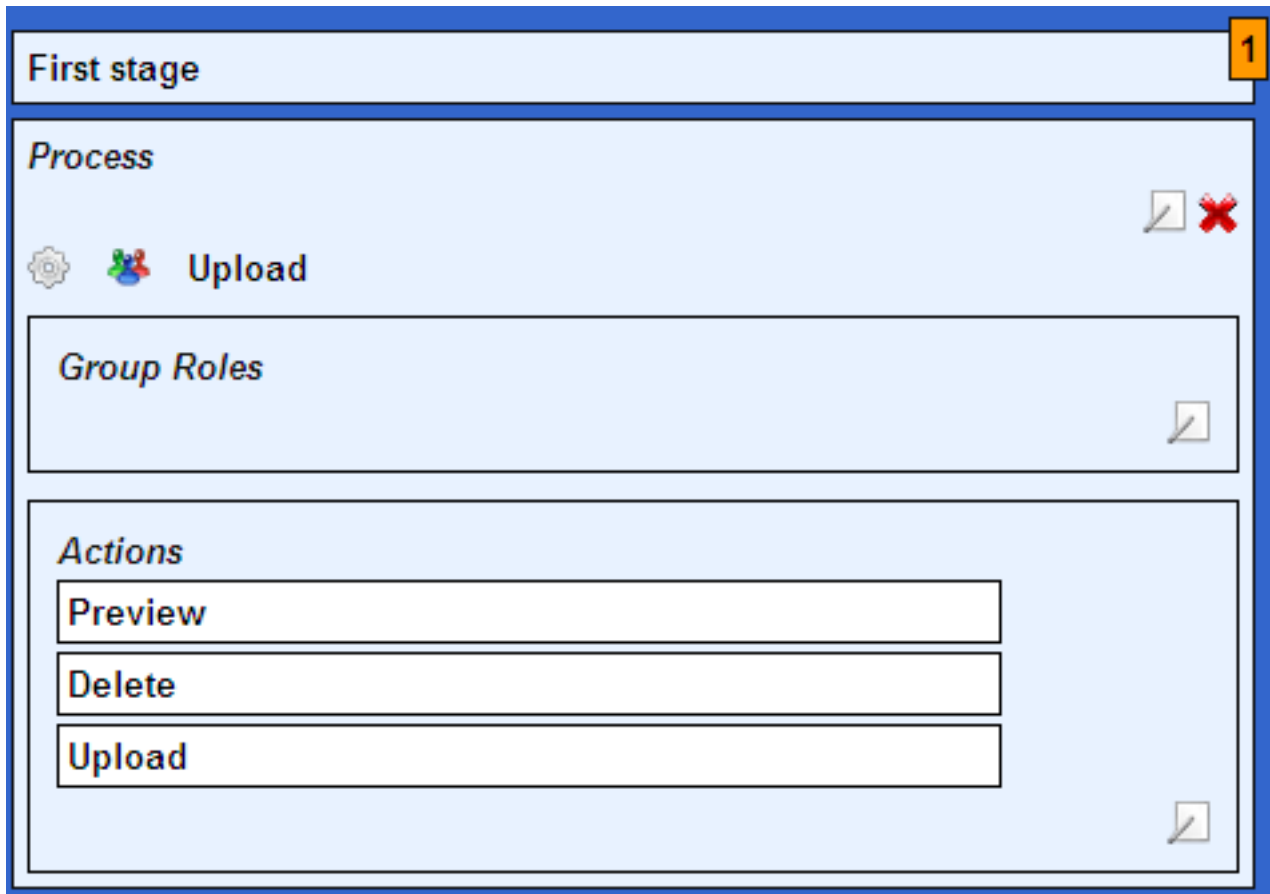
Now you can select the actions that you want to permit in this process. To select several options at once see the tips at the bottom of the panel.



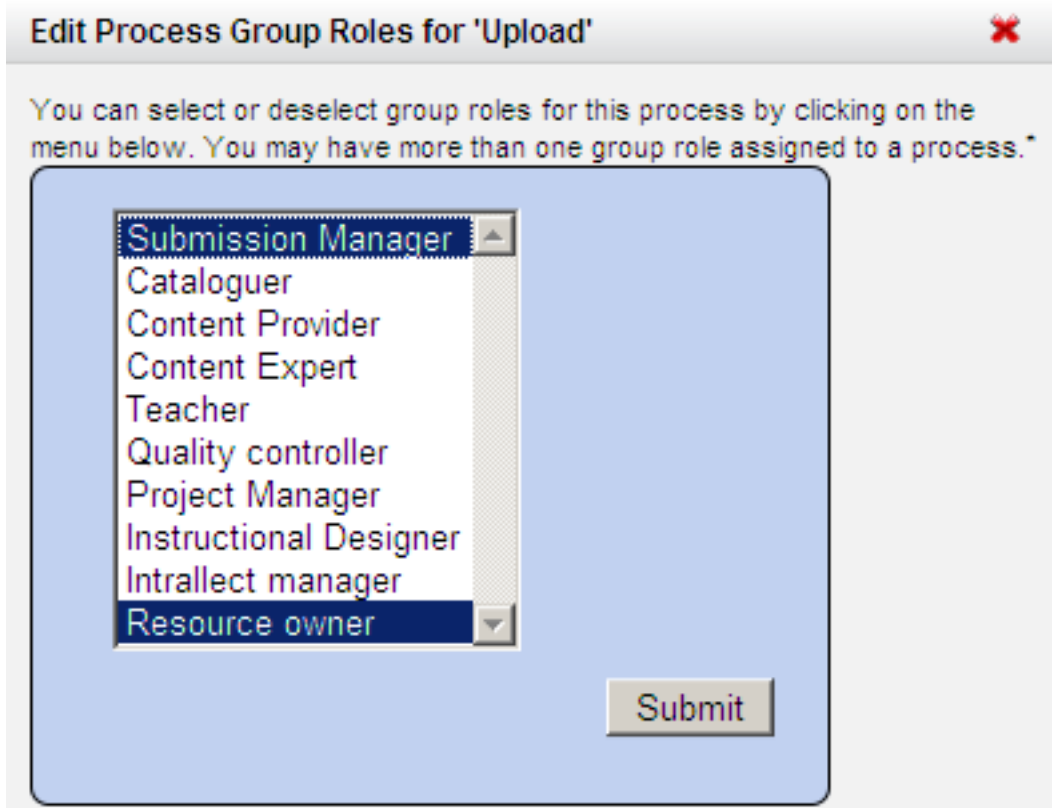
All of your selected actions will be available to users in the appropriate role in this process of the workflow.



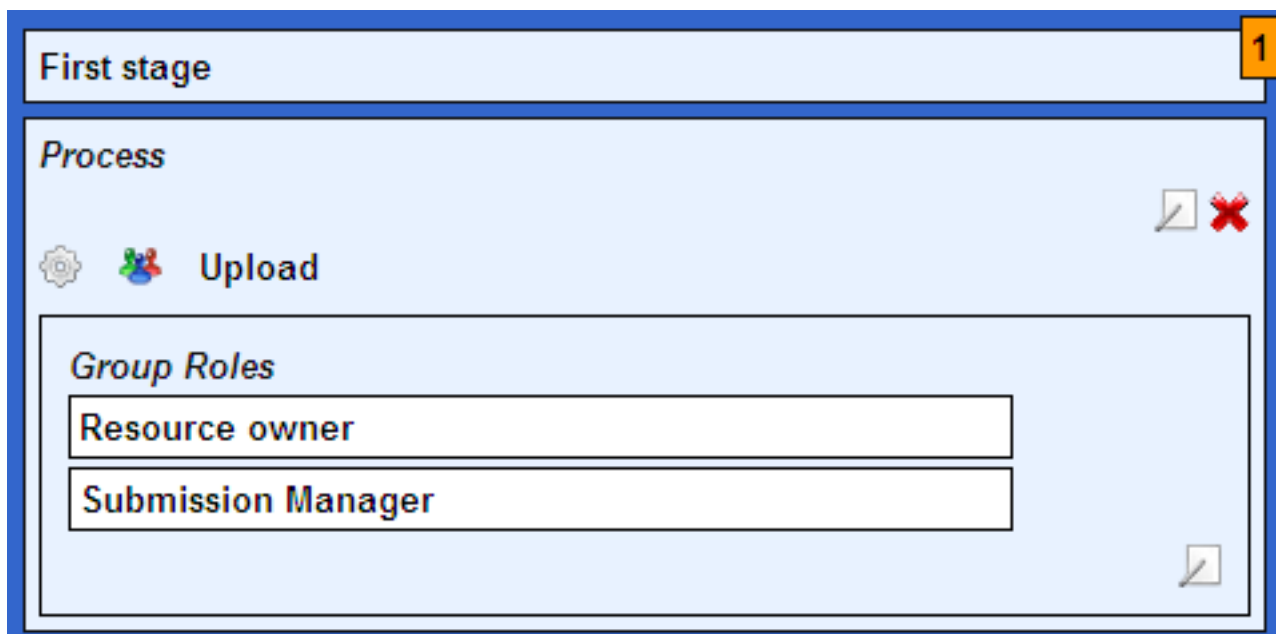
Now, to define which roles will be able to play a part in this process, click on the *people* icon in the process box. This will open a Group Roles box. Click on the *edit properties* icon at the bottom right of this box to add Group Roles.



In the pop-up box select the roles you want to have access to this process of the workflow. If the roles do not already exist you will need to leave workflow editing and add the new Group Roles. You can leave workflow editing at any time and your edits will be preserved when you return. See [Group Roles](#) for information on creating Group Roles.



Now the group roles you have selected will be displayed in the workflow. You can view the group roles and actions in any process at any time in the workflow section by clicking on the people or cog wheel icons respectively.



You now know how to do everything in the workflow editor and can proceed to create the group roles and actions in the process in the second stage by yourself.

Note that the workflow you have been editing has not yet been assigned to a group so is not yet active. While it remains inactive it is editable but once it is assigned to a group you will still be able to view it but not modify it. To further modify it you need to unassign it from use in all groups.

#### 4.2.6. Example Workflow Definitions

Intrallect can create workflows to customer's requirements, or you can [define your own workflows](#) and create them in intraLibrary. The following workflows are given as examples of what is possible. Each defines one or more processes, related actions and the published state (published/unpublished) in a workflow with one or more stages.

##### 4.2.6.1. Example 1: Basic intraLibrary Workflow

<b>Stages</b>	<b>Stage1: Contribute</b>
Processes	Process 1: Upload and Catalogue <ul style="list-style-type: none"> <li>• Upload</li> </ul>

	<ul style="list-style-type: none"> <li>Edit Metadata (All)</li> </ul>
Publish State	Unpublished

### 4.2.6.2. Example 2: Contribute, Catalogue, Review

Stages	Stage1: Contribute	Stage2: Catalogue	Stage3: Review
Processes	Process 1: Upload <ul style="list-style-type: none"> <li>Upload</li> <li>Preview</li> <li>Edit Metadata               <ul style="list-style-type: none"> <li>("General" subset)</li> </ul> </li> </ul>	Process 1: Catalogue <ul style="list-style-type: none"> <li>Preview</li> <li>Edit Metadata (All)</li> </ul>	Process 1: Check <ul style="list-style-type: none"> <li>Preview</li> <li>Preview metadata</li> <li>Reject (to stage 2)</li> </ul>
Publish State	Unpublished	Unpublished	Published

### 4.2.6.3. Example 3: Advanced Cataloguing Workflow

Stages	Stage1: Contribute	Stage2: Clear Rights	Stage3: Catalogue	Stage4: Classify
Processes	Process 1: Upload <ul style="list-style-type: none"> <li>Upload</li> <li>Preview</li> <li>Edit Metadata ("General" subset)</li> </ul>	Process 1: Rights <ul style="list-style-type: none"> <li>Preview</li> <li>Edit Rights</li> </ul>	Process 1: Transcription <ul style="list-style-type: none"> <li>Preview</li> <li>Edit Metadata (General and Technical)</li> </ul> Process 2: Subject <ul style="list-style-type: none"> <li>Preview</li> <li>Edit Metadata (Subject)</li> </ul> Process 3: Education <ul style="list-style-type: none"> <li>Preview</li> <li>Edit Metadata (Education)</li> </ul>	Process 1: Classify <ul style="list-style-type: none"> <li>Preview</li> <li>Edit Metadata (Classification)</li> </ul>



Publish State	Unpublished	Published	Published	Published
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#### 4.2.6.4. Example 4: Simple Content Managing Workflow

Stages	Stage1: Create Placeholder	Stage2: Add Content	Stage3: Review Content
Processes	Process 1: Upload <ul style="list-style-type: none"> <li>• Upload</li> <li>• Edit Metadata (All)</li> </ul>	Process 1: Upload <ul style="list-style-type: none"> <li>• Preview</li> <li>• Overwrite</li> <li>• Edit Metadata (Technical subset)</li> </ul>	Process 1: Check <ul style="list-style-type: none"> <li>• Preview</li> <li>• Move (to stage 2)</li> </ul>
Publish State	Unpublished	Unpublished	Published

#### 4.2.7. Working on Resources

Users must reserve a resource before they can work on it. This can happen in one of three ways:


- The user is the person who uploaded the resource, and they ensured that the "reserve" checkbox on the upload page was checked.
- The user is the only person with access to the stage the resource is in. In this case the resource automatically goes into their reserved area.
- The user clicks on the "reserve" button for that resource from the available section of their work area.


Once they have reserved the resource, it appears in their reserved area and the actions in the relevant workflow processes become available. On the resource page a panel at the top of the page is headed with the name of the stage and the available workflow actions are shown, as well as a button to click when the process has been completed.


Reserved (2) Available (6) My Resources (20) **Resource Page**

Sintel 223 Mb example UNPUBLISHED

**Upload**

  
 Describe resource


  
 Publish resource


  
 Unreserve resource


Title: Sintel 223 Mb example


Added on: 22/08/12 @ 12:12


Things you can do with this resource


  
Preview


  
View information


  
Download

  
Delete

  
Move

  
Workflow

  
Manage favourites

  
Add to basket

In the reserved area the user can work on the resource in various ways: describe resource, link related resources etc. When they have completed their work, and met any criteria on the metadata, they click the button to declare the process as completed.

When all the processes at that stage are marked as completed, the resource will be moved on to the next stage. Users who have access to the resource at the next stage will receive an email alerting them that there is a new resource to work on, unless they have changed their user profile to not receive group alerts.

#### 4.2.8. Defining a Workflow for Use in intraLibrary

A workflow can be added to intraLibrary by a user who has administrator access to the repository or who has a System Roles that contains *Configure workflows*. (It is also possible create and upload your workflow in an XML document which conforms to the XML Schema for submission workflows, which is publicly available at [http://www.intrallect.com/xsd/intralibrary\\_workflow\\_v0p5.xsd](http://www.intrallect.com/xsd/intralibrary_workflow_v0p5.xsd)). See the intraLibrary **Configuration Guide** for more details on how to configure a workflow.

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### 4.2.9. Removing Users and Groups

An administrator can remove a contributor from the system. If there are resources which the contributor is working on, the administrator will have the option to have the resource's ownership information removed.

Administrators can also remove whole groups from the system. If the group is currently working on resources then the administrator will have the option to transfer the resources to another group.

## 4.3. Working with Groups and Workflows

### 4.3.1. Relationship Between Groups and Workflows

There may be one or more workflows available in the system. After creating a group of users, an administrator can assign one of the available workflows to the group. This group of users shares an instance of the workflow. Other groups can share their own instances of the same workflow.

Users get access to processes within a workflow by being assigned workflow roles within the group. To give roles access to workflow processes, the administrator must add the roles assigned to the process in the workflow editor. The administrator assigns users to one or more workflow roles in the context of a particular group. Users who are members of more than one group can be given different roles in each group.

It's also possible to ensure all users in a group have access to their own resources when those resources are in a particular workflow process. The process must include the role *Resource owner*. The intraLibrary default workflow, for instance, only has one stage for upload and cataloguing, and has the *Resource owner* group roles assigned, so that all users can upload their own resources, catalogue, and publish them.

### 4.3.2. Group Roles

New Group Roles can be added in the *Groups* section of the Admin pages. Click on the

Group Roles tab and use the green cross to add a new role by supplying a name and description for the new role. This role will then be available for use in workflows.

### 4.3.3. Access to Resources in a Workflow

To participate in a submission workflow, users must have contributor status. Normal users do not have a [My Work](#) section.

Resources belong to one group only, and are therefore part of only one submission workflow. Resources exist at a single stage in the instance of the workflow belonging to that group. Group members assigned a role in a submission workflow may have access to one or more stages of the workflow.

Users share an "available" area for each stage of the group's workflow. All users in the relevant roles will be alerted when a resource is moved into the relevant "available" area. Any user in the relevant roles can then choose to select this resource to work on (see below).

To allow a contributor user to add a resource to a particular collection, the administrator must [give the group "contribute" permission to the collection](#). A resource must be in at least one collection and can be in many different collections.

### 4.3.4. My Work

Each contributor user has a work area, accessed through the *My Work* tab, where they participate in the submission workflow. The work area is divided into three parts: Reserved, Available and My Resources.

When the user has group role access to a workflow stage that includes the action "upload", they will have an upload button available. Likewise, if they have access to a workflow stage that includes the action "import from filesystem", they will also have an import button. If they do not have group access-permission to contribute to any collection, neither the upload nor import button will appear in their main toolbar.

In the *available* section users can see all the resources they potentially have access to. Each resource has a listing that includes title and description, and access to basic functions such as preview, download and reserve. Users can select the resources they want to reserve so

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that they can work on them. The *Details* button opens the resource page. In the available area you will only be able to *Reserve resource* as you can only work on the resource when it is reserved.

In the *reserved* section you see all the resources you have chosen to work on. The *Details* button opens the resource page which shows the available workflow actions across the top as well as other things you can do with this resource

In the *My Resources* section you see all the resources you have ever uploaded including those in workflows and those which have been through workflows in the past.

In both the *My Work* areas, the list of resources displayed can be constrained by various criteria. Users can apply filters, from the panel on the left, to select resources in a particular group and a particular stage of a workflow. [Saved searches](#) can be used to search the list of resources by specific properties.

The *upload* page, which appears when the user clicks the upload button, is where a user can contribute a resource (file, pages, URL, content package, etc.) to the system. Users only see this section if they have access to a workflow process that includes the ["upload" action](#). Users can choose at the upload stage whether or not to automatically reserve resources they contribute. Users who are members of several groups can choose which group they are contributing the resource to. If the group has access to more than one collection then they can choose which collections to put the resource into. They can also upload any number of resources at once by clicking the *Add another resource to upload* link in the upload form.

The *import* section is provided to enable users to import large files from the server filesystem. Import also allows users to upload a number of resources at once. Users only see this section if they have access to a workflow process that includes the ["import from filesystem" action](#). When users import resources, they can choose whether or not to automatically reserve those resources. Users who are members of several groups can choose which group they are contributing the resources to. If the group has access to more than one collection then they can choose which collections to put the resources into.

## 5. Devolving Administration

Sometimes, particularly on larger intraLibrary systems, it is difficult for one person to manage every aspect of intraLibrary. In these cases it is useful to be able to devolve some


responsibilities. It may also be useful to devolve responsibility closer to the user groups who are responsible. In this section several types of devolved administration are described.

### 5.1. Automatic Allocation of Users to Groups

It is possible to automatically add users to specific groups. Since this obviously depends on knowing some additional information about the users, this is only possible when user authentication is carried out through an external authentication source supported by intraLibrary, such as LDAP, and even then only when suitable attributes are available to identify user groups. This process is also capable of gathering user properties, such as email address and affiliation, which are already available as authentication attributes.

If you would like to implement automatic allocation of users to groups please contact Intrallect directly to discuss the information available from your authentication source. It is necessary for Intrallect to create a set of "allocation rules" so this requires discussion with each client.

### 5.2. Group Administration


In intraLibrary administrators can devolve some aspects of group administration to other users. For example, if a Faculty or Department group exists it may be best for a Faculty or Department representative to manage who belongs to that group. An administrator can allocate a Group Administrator role to *any* registered intraLibrary user, even those who are Guest or Contributor users. To make someone a Group Administrator the administrator should go to the Admin > Groups page and click on the group admin icon  for the appropriate group.

A user who has been granted Group Administrators rights will see an Admin button on their toolbar. When they click on Admin it will only provide the Groups option. When they click on Groups it will provide access to the group(s) they can manage. If they can manage only one group it will open the Manage Group Members page. This will allow the Group Administrator to manage membership of groups but not the properties of the group itself (its name, description, workflow, etc). Specifically the Group Administrator will be able to:

- Add any intraLibrary registered user as a member of the Group.
- Remove a member of the Group. This only affects their group membership, not their intraLibrary registration.

- 
- Assign or unassign the Group Role of any Group member. This allows the Group Manager to provide or remove access to different parts of the workflow for this Group.
  - Add new Group Managers.
  - Remove existing Group Managers (including themself).

### 5.3. Collection Administration

An administrator can create a Collection Administrator by going to the Admin > Collections page and clicking on the collection admin icon  for the appropriate collection. Collection administrators may be Guest, Contributor or Administrator but see below for more details about what each can do.

When a Collection Administrator is created they are given the role of receiving emails from:

- Report Abuse: When someone takes offence at a comment added on a resource page they can Report Abuse. The original annotation and the reason why it is considered abusive are sent by email to the Collection Administrator. The comment identified as abusive is immediately removed from the resource page.
- Report a Problem: Any user may identify a problem with a specific resource. An email defining the resource and describing the problem is sent to the Collection Administrator.

Note that the contents of the email sent to Collection Administrators can be configured by using Email Templates. For example, *report a problem* can automatically detect the user agent - the browser version used at the time of reporting the problem.

Once a problem or abuse is reported the next step is to take action. At this point the action available depends on the user role of the Collection Administrator:

- Guest Users: Although Guest users can receive reports they can take no action about them. Having Guest users as Collection Administrators is not prevented, but it is of very limited value.
- Contributor Users: Contributor users cannot act on Report Abuse reports. However, they may be able to act on Report a Problem emails if they have access to workflows that allow them to correct the problem or move the resource to a workflow to have it corrected.
- Administrator Users: The most effective use of Collection Administrators is when they are administrator-type users, perhaps not full administrators but at least having System Roles which enable them to act on Reports. The types of actions likely are:

- Report Abuse: When a Report Abuse email is sent the comment considered abusive is removed from the resource page. Someone then needs to decide if the comment is abusive and should be permanently removed or if it is not abusive and should be restored to the resource page. These actions can be taken by a Collection Administrator who also has administrator-type rights. On the resource page the Collection Administrator will see the reported comment highlighted with a tick icon to restore it or a delete icon to remove it.



- Report a Problem: Since many types of problem may be reported the Collection Administrator may need the full range of administrator powers to handle the problem, which might require changes to the resource or its metadata, or even deletion or overwriting the resource with a new version.

## 6. Collections

### 6.1. Introduction

Collections are used in intraLibrary to collect together resources which have a common property, such as ownership or resource type. There are various reasons why a collection might be created, but the main practical reason is for controlling different kinds of access to a set of resources, or what kinds of metadata or licences are applied to them. Different levels of access to a collection can be assigned to different groups of users, for the purpose of controlling which users can see what resources, and which parts of the repository users can contribute to.

### 6.2. Properties of Collections

#### 6.2.1. Summary of Collection Properties

There are a number of properties which can be set for a collection:



- 
- **Name:** A name for the collection.
  - **Description:** A description for the collection.
  - **Identifier:** A string that can be used to identify the collection.
  - **Application Profile:** The [metadata application profile](#) to be applied to resources in the collection (optional).
  - **Licence Model:** The [licence model](#) to be applied to resources in the collection (optional).
  - **Show Package Navigation:** When resources in IMS or SCORM Content Package format are previewed, or viewed via a Public URL, by default they are displayed with a left-hand frame indicating the structure of the package, allowing the user to navigate through the package, or see a flat list of resources in the package. In addition, when a user has "package" set as their default resource view in their preferences, they see single file resources within the package view left-hand frame. Un-checking the Show Package Navigation option means that packages and single file resources will be displayed in all cases without the left-hand frame, with the first page appearing by default. If a resource is in more than one collection, and the collections have different settings for this option, then the package navigation frame will be shown. Switching off this option is useful if you have packages that have their own navigational structure built into them; users then don't need the left-hand frame. NB: If you switch this setting off, users won't have access to "export package" via Public URL, as noted below under "Allow Public Package Download".
  - **Default Permissions:** The [access permissions](#) that are applied to groups without specific permissions (normally the minimum level of access).
  - **Access to Taxonomies:** The classification system(s) that can be applied to resources in the collection, and viewed by users with "Find" access to the collection.
  - **Searchable by External Systems:** Whether or not external systems can search the collection using SRU/SRW.
    - More information on this is available in the [Controlling Remote Access to Collections](#).
  - **Harvestable by External Systems:** Whether or not external systems can harvest metadata about published resources in the collection using OAI-PMH.
  - **Allow Public Preview:** Whether or not external users can preview resources in the collection using a Public URL.
  - **Allow Public Package Download:** Whether or not external users can download packaged versions of resources in the collection, using a Public URL. There are two ways this can occur:
    1. In an SRU search a package can include a packageDownloadLocator (a URL from which the package can be downloaded). The URL is available in an SRU search only if this option is enabled.
    2. The Public Package URL is made available as an "export package" link in the left-hand package navigation frame when viewing the package via Public URL. If the "Show Package Navigation" setting above is switched off, this link will be

unavailable regardless of whether *Allow Public Package Download* has been enabled or not.

A Public Package URL can also be generated via a metadata template, which can be applied to the resource's metadata in the metadata editor, or at the point of SRU/SRW searching or OAI-PMH harvesting.

### 6.2.2. Relationship to Classification Systems

One or more classification systems (taxonomies) can be used for each collection. This enables shared classification systems to be used for some or all resources in the repository, or separate classifications to be used for each collection.

The classification systems used for collections affect what users see in their Browse Library interface, and contributing users see in their Classification interface. For example, if collection A uses classification system A and collection B uses classification systems B and C then:-

- A user who only has access to collection A will see classification system A.
- A user who only has access to collection B will see classification systems B and C.
- A user who has access to collections A and B will see classification systems A, B and C.

### 6.2.3. Relationship to Application Profiles and Licence Models

Collections in intraLibrary can use different metadata application profiles and licence models from each other. Many customers may have no need for this feature, so it is important to point out that many installations of intraLibrary will only ever use one metadata application profile and one licence model (if any). If this is the case, then there only ever needs to be one "active" application profile and licence model, and these will be applied to all collections by default.

However, some customers will need to manage collections of resources which have different metadata properties, or are licensed under different sets of conditions. In this case the submission workflow will apply the application profile and the licence model appropriate to the collection the resource is in. It should be noted that:

- The application profile and licence model associated with a collection takes precedence over the application profile and licence model associated with a group (see [precedence issues](#)).
- If users are allowed to put resources into two or more collections at the same time, then the collections **must** use the same application profile and licence model (if any).

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## 6.3. Managing Collections

To manage collections, click on the "Collections" link in the "Admin Tools" navigation bar. This will open the "Collections Management" area. In this area an administrator user can change the properties of existing collections, add new collections to a system, and remove collections which have no resources in them.

In new installations of intraLibrary, and installations that have been migrated from previous versions of the software, there will be a single collection called "default collection". You can rename and change any other property of this collection by clicking the "Edit Properties" link for this collection.

To add a new collection, click the "Add Collection" button at the top of the Collections Management area. You will be taken to a form to fill in all the properties of the new collection.

For information about changing which collections a resource is in, please see the **Librarian's Guide**.

## 6.4. Managing Access

### 6.4.1. Relationships to Groups of Users

Managing access to collections is defined through the collections' relationships to groups of users. Every group has a relationship with every collection. For each group-collection relationship, the permission which the group members have when working with resources in a collection are defined.

To make it easier to manage the relationship between large numbers of collections and groups of users, each collection has a default set of access permissions. Groups who have not had specific access-permissions assigned to them for a particular collection get the default access permissions. Therefore the default access permissions for a collection are generally the lowest common denominator of access an administrator wants to allow.

### 6.4.2. Access Permissions

There are six permissions associated with each group-collection relationship, and they are described below. The administrator can choose any combination of them. For example the administrator could allow members of group A to be able to find and preview resources in collection B without allowing them to export and contribute resources. The permissions are:-

- **comment:** allow all users in the group to add comments and labels (user tags) to resources in the resource page
- **contribute:** allow contributors in the group to add resources, edit metadata and perform other functions in accordance with their role in the group.
- **download** allow all users in the group to download the resource, metadata and Public URL of the resource.
- **find:** allow all users in the group to find resources in the collection using search and browse, and see the metadata for the resources they find.
- **preview:** allow all users in the group to preview resources in the collection.
- **star rating:** allow all users in the group to add star ratings to resources.

**Please note:** For simple resources, such as single documents or media files, the distinction between "preview" and "download" has little meaning, since it is necessary to download the file to the web browser to be able to preview it. The distinction only has meaning for more complex resources, such as content packages, where it would more difficult, although not impossible, for a user to download every file connected with a resource and reassemble it.

Note also that these access permissions do not apply to administrator users who always have all permissions on every collection.

### 6.4.3. Contributing to a Collection

For a user to contribute a resource to a collection they must:

- have a system role of "contributor" type
- be a member of a group which has contribute permission for that collection
- have a role in the group's workflow which allows them to contribute resources

## 6.5. Controlling Remote Access to Collections

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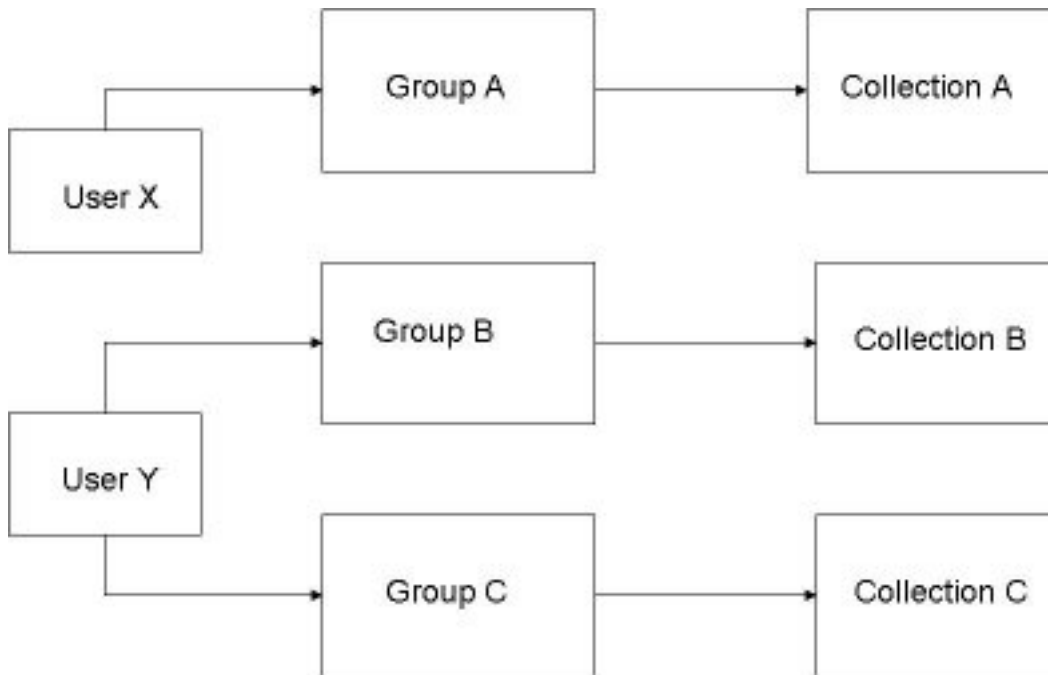
The ability of external systems to search an intraLibrary repository is configurable for each collection within the repository. Two approaches are currently supported:

1. selectively opening/closing collections for external search
  - this is controlled by editing the properties of a collection in the "admin tools" interface
  - a collection is either open to external searching or closed to external searching (default)
2. controlling access using authentication tokens
  - tokens are created and assigned to a collection in the "collections" section of the admin interface
  - tokens can be supplied by external systems making search requests
  - results will only be returned from collections to which the supplied token has been assigned, or to which no tokens have been assigned


For more information on controlling external access see the **intraLibrary Integration Guide**.

## 6.6. An Example of Using Collections

A simple example of relating groups to collections is shown in the diagram below. In this case User X is in group A and User Y is in groups B and C. Group A has full access permissions (i.e. find, preview, download, comment, star rating and contribute) to collection A but no access permissions to Collections B and C. Similarly group B has full access permissions to Collection B but no access permissions to Collections A and C.



As a practical example consider the process involved in creating a collection (Collection A) and giving full access to it for members of group A and no access to it for members of group B and group C. Assuming that groups A, B and C already exist, you would need to perform the following steps:-

- Click on the *collections* part of the admin tool bar. Now click on the *add collections* and create a collection (calling it collection A). Unless there is a reason for not doing so give the collection access to some or all classification systems in the repository. Now save the collection and return to the collection management page.
- From the collection management page click on the *Manage Access* icon  for collection A.
- Select group A from the menu on the left and click *Remove Default Permissions* then tick the boxes "find", "preview", "download", "comment", "star rating" and "contribute". This will allow a member of group A to have full access permissions to group A.
- Select group B from the menu on the left and click *Remove Default Permissions* then ensure that the boxes "find", "preview", "download", "comment", "star rating" and "contribute" are not ticked. This will mean that members of group B will have no access permissions for collection A.
- Select group C from the menu on the left and click *Remove Default Permissions* then ensure that the boxes "find", "preview", "download", "comment", "star rating" and "contribute" are not ticked. This will mean that members of group B will have no access

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permissions for collection A.

If you have to handle many more groups than in this example it is often best to "handle access by exception". Set the default permissions for the group to be the most commonly used permissions and then you only need to set specific permissions for the exceptional groups.

## 6.7. Precedence Issues

When contributing a resource to intraLibrary, there is an order of precedence which determines which application profile and license model is applied to a resource. This is only an issue in installations when more than one application profile or license model is being used.

The general order of precedence is collections, groups, default settings. This means that if features are defined at the level of collection then they will be used. If they are not defined at collection level then the ones at group level will be used and if they are not defined at group level then the default settings will be used. For example:-

- If a resource is entered into a collection which uses an application profile then this application profile will always be used.
- If a resource is entered into a collection with no application profile but the user is in a group with an associated application profile then this application profile will be used.
- If a resource is entered into a collection with no application profile and the group does not have an associated application profile then the default application profile will be used.

## 7. Metadata and Vocabularies

### 7.1. Introduction

There are several options for configuring the use and behaviour of metadata and vocabularies within intraLibrary. The most important is the "application profile", which is used to control which metadata fields are in use in a particular context, and the rules for applying these metadata fields. It is also possible to modify the metadata vocabularies available within the system. Subsets of the available metadata fields can be created to define which fields contributors and cataloguers see in a workflow.

### 7.2. Configure Application Profiles

The administrator's choice of application profile affects which metadata fields are exposed to users, and what rules are applied to these metadata fields. Typically, an organisation or project will have well defined rules for how metadata should be used, and these are expressed using application profiles. They may well base their application profile on a published application profile, such as those given below.

Application profiles can be used to combine fields from more than one metadata model. The IEEE LOM model is included by default. If any other models have been added to the system, fields from these models will also be available for editing in the application profile editor. If you need to add additional metadata models to the system, you can do so by adding a new application profile or copying then editing an existing one in the "metadata" section of the "admin" menu. More information about defining metadata models is provided in the **Configuration Guide** for intraLibrary.

One or more application profiles can be *active*, which means they can be applied to collections or user groups. See the section on [precedence issues](#) for more information about how these two uses of application profiles are related. This enables an organisation to use different application profiles for different kinds of resources or services, whilst managing them all in a single repository system.

The application profile controls several aspects of each metadata field, including cardinality, optionality, visibility, editability and vocabulary.

IntraLibrary comes with one pre-configured application profiles:

- IntraLibrary: This is a simple application profile designed to get you started


An administrator can also add, copy, delete and edit application profiles inline. If an application profile is to be based on one that already exists it makes sense to use "copy" to avoid having to create your new application profile from scratch. When you click "add application profile", the properties of fields in the new application profile are populated from the defaults that intraLibrary uses.

Intrallect can help you define an application profile that meets the specific needs of your project or service. Please contact Intrallect ([support@intrallect.com](mailto:support@intrallect.com)) for more information.



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### 7.3. Edit an Application Profile

IntraLibrary includes the ability to edit an application profile inline. To do this, click the *edit* icon  of the relevant application profile in the listing. Editing an application profile should only be undertaken by someone who knows what they want to achieve with an application profile and who is familiar with the IEEE LOM metadata model.

One simple property of an application profile that can be changed easily is the *default optionality* of an application profile. This affects the list of metadata fields that appears by default in the metadata editor. The default is to show only the mandatory fields. If for example it was desired to show contributing users all the mandatory and recommended fields by default, the default optionality should be changed to *recommended*. It is also possible to change the names of the levels of optionality, e.g. you can set "mandatory" to appear in the Metadata Editor as "fields that must be filled in", etc.

The following properties of an individual field can be modified:

**Field Size:**

How many characters are allowed for an entry in the field

**Cardinality:**

How many instances of the field are allowed

**Visibility:**

Whether or not the field is displayed in the metadata editor

**Editability:**

Whether or not a user is able to edit the value of the field

**Optionality:**

Whether the field is *mandatory*, *recommended*, *optional*, *not-recommended* or *not-used*. Only the optionality levels used in an application profile appear as options to users, so if only Mandatory, Optional and Not Used are applied to fields, then contributors will only see those three options. It is also possible to change the names of the levels of optionality, e.g. you can set "mandatory" to appear in the Metadata Editor as "fields that must be filled in", etc.

**Vocabulary:**

Which vocabulary is used to populate a fixed vocabulary field. Select the vocabulary name from the drop-down list.

### 7.4. Manage Vocabularies

The administrator can manage the vocabularies used in the metadata by going to the "vocabularies" section of the "admin" tools. It is possible to create, edit and delete vocabularies. Vocabularies can be modified in various ways including:

- Changing the name and ID of the vocabulary
- Adding and deleting terms
- Importing terms defined in IMS VDEX format
- Changing the order the terms are displayed in
- Editing the term or "token" itself
- Changing the "source" for a term
- Creating labels for each term in multiple languages

The system will prevent you from deleting a vocabulary that is currently being applied in an application profile. It will not stop you from modifying any vocabulary, so it is important to be aware of which vocabularies are being used in the system, and how any changes will affect users.

Changes to the vocabularies affect what terms users will see in the drop-down list for each vocabulary. These drop-down lists are used in the metadata editor, and the advanced search interface. If you edit a vocabulary term (token) itself, metadata records which include the original term will not be affected. If you change the label for a vocabulary term, this change will be visible everywhere the term is used.

### 7.5. Metadata Subsets

It is possible to control what metadata fields users in different group roles can see and edit within different processes of a workflow, e.g. you may wish those uploading resources to only see and fill in the title, description and keywords for a resource, with cataloguers filling in the rest of the metadata at the next stage. You may also wish the cataloguers to be able to see the automatically generated identifier for a resource, but not be able to edit it. An administrator can manage this by configuring metadata subsets in the "metadata" section of the "admin" tools. Metadata subsets configured there are associated with workflows by their name, so it is important that the name of the subset be exactly the same as the subset name in the associated workflow. You must configure any subsets associated with a workflow **before** you upload the workflow to the repository in the "workflows" section of the "admin" tools. However, it is possible to edit a subset once both subset and workflow are active in the repository.

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## 8. Search

### 8.1. Configure Search

This interface allows you to configure the following aspects of the search features in intraLibrary.

- Simple Search: Which metadata fields are included in a *simple search*.
- Advanced Search: Which metadata fields appear in the drop-down list of available fields in the *Advanced Search* interface.
- Reference Search: Whether or not the contents of a field are displayed as a search link in the "view metadata" page. Typically used for "reference" fields, such as identifiers.

In intraLibrary you may search for terms in different places:

- In metadata fields, for example, titles, descriptions, keywords, author's names.
- In the body of a resource, for example, words or phrases in documents (MS Word, PDF). This is sometimes called full-text search.
- In the classification system, for example, in the node terms, synonyms (use fors) or descriptions of nodes. In this case all resources in matching nodes are displayed.

You can use this interface to change the search configuration. If you do change these settings, you must [re-index the metadata](#) before they will take effect.

Field	Simple		Advanced		Reference
		Default	Power Searcher		
On file content	<input type="checkbox"/>	<input type="checkbox"/>			
BCU		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
only show fields from metadata model: <input type="text" value="All Models"/>					
General Information					
IMS LRM Identifier	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Title	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
Catalogue Entry					
Catalogue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
LOM Identifier	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Bibliographic Citation					
Source Publication Type	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
Source Title	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
Journal Volume	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
Journal Issue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Source Publication Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Start Page	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
End Page	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Language of Resource	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Description	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
Keyword	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>

In the example above *On file content* has not been checked, either for simple or advanced search so no full text search can be carried out. *BCU* is the the only taxonomy in this classification system and because it is checked for advanced search it is possible to search specifically for terms in the *BCU* taxonomy through the advanced search interface. The

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remaining items in the table (of which only a small section is displayed here) are specific metadata fields. Some have been selected for simple search (Title, Description, Keyword) so words or phrases used in simple search will be matched if they exist in any of these fields. Advanced search also has a number of fields checked for default users. These fields are available in the advanced search interface to search for words appearing specifically in a Title or specifically in a Description. Metadata terms that are not checked in this list will not be available for advanced search. In this example only Keyword has been checked in the Reference column. So all Keywords displayed in the full metadata will act as links to search for other items with the same keywords.

### 8.1.1. Simple Search

By default intraLibrary is configured to use all the main free-text metadata fields in a simple search. Those metadata fields with fixed vocabularies are excluded from this index because they might skew the search towards words that are used as tokens in the vocabularies.

### 8.1.2. Advanced Search

The default drop-down list of metadata fields in the advanced search interface includes the metadata fields that are commonly considered useful. However, you may wish your users to have access to searching other metadata fields. This interface allows you to configure which metadata fields appear in the drop-down list.

When new System Roles are created it is possible to give them a customised advanced search by checking *use custom advanced search*. In the example above a system role called Power Searcher has been created and users in this role have additional advanced search fields.

In addition, it is also possible to create new system roles with *Configure search* permissions. Roles with this permission set will be able to set their own advanced search criteria which will apply to their specific role.

### 8.1.3. Reference Search

Values stored in specified metadata fields can appear as links in the view metadata page. A user can click these links to see a list of resources which have that same value in their own

metadata. A good example of where this is useful is when one resource makes a reference to another resource, using the "relation" fields from the IEEE LOM metadata. The user can click on the link to the reference and see the resource the metadata refers to.

Making a metadata field available for "reference search" means a search link will be displayed for every instance of that field that appears in the view metadata page. Users can then click that search link to carry out a reference search when viewing metadata for a resource. Reference search is carried out as a "simple search" of the term in the link being clicked on, which means the search runs against all the fields specified for "simple search", not just for that specific metadata field. So you must ensure that the correct fields are configured for simple search for your users.

### 8.1.4. Full Text Search

If you select *On file content* for simple or advanced search then the search index will include text within certain file types. These file types are:

- MS Office documents
- Open Office documents
- PDF files

### 8.1.5. Classification Search

You can configure the search index to include terms in the classification system. This should normally be done with great caution as common terms in classifications will result in large numbers of search results with little discrimination. It is most commonly useful when a classification system has extensive notes or "use for" terms as these are also included in the search index. For this reason classification searches can be switched on or off on a taxonomy by taxonomy basis.

## 8.2. Public Saved Searches

IntraLibrary includes the ability for users to save search criteria from the *Advanced Search* page. Administrators of the system have an additional power to create *public* saved searches, for use by other users.

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Public saved searches commonly define the sort of search constraint that users might want to deploy as their *default saved search*. Users will see a list of public saved searches in the relevant drop-down list in their user preferences page. They can select a default saved search to constrain the results of all of their search and browse operations.

Contributor users can use public saved searches or their own personal saved searches to search the contents of their [work area](#).

## 9. Agreements

The organisation running intraLibrary may wish to use the usage agreement feature of intraLibrary to record users' acceptance of a general agreement to use the system. This agreement may encompass the legal agreements that are defined for the community licences described in the next section or it may simply be a code of conduct. The text of a usage agreement can be entered into the system by the administrator. On first or every login, the user can be presented with this agreement to accept or reject. Details of the acceptance of an agreement are recorded in the database, and users can see what agreements they have accepted at any time in their profile.

## 10. Licences

The licences section of intraLibrary based on ODRL (Open Digital Rights Language) is now deprecated and is included in intraLibrary only for backward compatibility. It should not be used.

## 11. System

The *system* section has six tabbed sub-sections:

- User Options
- Metadata Options
- RSS Options
- System Options
- Tech Summary
- Open Access

The options within these are detailed below.

### 11.1. User Options

The following settings can be configured for users:

- The ability to delete and move resources which they have contributed to the library. Set to "no" by default; in this case only users with a system role (based on Administrator) with this permission set may move or delete resources.
- The ability to request a new password to be sent to them. A "forgotten password?" link will appear in the login screen if this is enabled. Set to "no" by default.
- Whether or not users can choose not to use a metadata template. Setting this to "yes" means that a user could choose to circumvent your default metadata template; if this template is generating important fields such as identifiers, resources uploaded by such a user would have no identifiers. Default is "yes".
- Whether or not people in specific system roles receive email alerts when any resource receives a comment or tag from a user. Default is "none".

### 11.2. Metadata Options

The following metadata settings can be configured:

- Whether or not the contributing user's default metadata template should be applied to a content package on import. If this is set to "no" the package will not have any local macros applied, such as those generating unique local identifiers. If set to "yes" the content package's original metadata may be modified. Default is "no".
- Whether or not users' comments are excluded from exported metadata. This applies only to comments, which are part of standard LOM metadata. Default is "no" so comments are exported.
- Whether or not users' tags are excluded from exported metadata. Tags are an Intrallect extension and not part of standard LOM. Default is "no" so user tags are exported.
- The metadata template (if any) to apply to the results of an external SRU/SRW search request (see the Integration Guide for more information). Note that this is a system-wide application of a metadata template. It will be applied every time an SRU/SRW request is made. Default is "none".
- The metadata template (if any) to apply to the results of an external OAI-PMH harvest request (see the Integration Guide for more information). Default is "none".
- Whether or not quality marks can be imported and stored in intraLibrary, otherwise they always exist as external links. Default is "no".



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### 11.3. RSS Options

The following RSS newsfeed settings can be configured:

- The location of a stylesheet to be used for RSS newsfeeds. Default is to have no stylesheet.
- The frequency with which the RSS cache is updated. Default is "1 day".

### 11.4. System Options

The following general system settings can be configured:

- The default language for the system. Default is "English"
- Which licence pattern (metadata template for ODRL rights metadata), from any of the system's licensing models, will be applied by default to resources on upload. Licences are now deprecated and this section is only available for backward compatibility.
- The number of records that should be returned for a single OAI list request. The default is 1000.
- The maximum basket size below which a user can export their entire My Basket contents. The default is 100MB.
- Whether or not metadata at any level of a content package is searched. The default is "no", in which case only metadata in the package manifest is searched. If searching for metadata stored at the resource or sub-manifest levels of packages is required then this should be set to "yes".
- The Application URL for your intraLibrary installation (used for generating Public URLs and so on, when a user hasn't logged in, e.g. when SRU/SRW searching is used). Should be the URL of this instance of intraLibrary. Should not have a closing "/", e.g. `http://demonstrator.intralibrary.com`.
- The Browse entry page. The page that appears the when the browse view is selected. This is set, by default, to an intraLibrary page, `browseentry.jsp`, which describes how to use the system. However it can be set to any URL and the relevant page will be displayed when the browse view is selected. This can, for example, be used as an information page to provide recent repository news.
- The Search entry page. Similar to the Browse entry page but this is the page that appears when Advanced Search is selected. The default, `searchentry.jsp` can be replaced by any URL. Note that these pages can be set back to the default values at any time.

### 11.5. Tech Summary

This page is automatically generated from the intraLibrary, Java, operating system and MySQL data on the server. When reporting any problems to [support@intrallect.com](mailto:support@intrallect.com) it is extremely useful to copy this page and include it in the description.

### 11.6. Open Access

A URL to an openSearch style sheet can be included here (default is "null"). If included, this XSL style sheet will be applied when searches are carried out using openSearch - the search mode used by web browsers such as Internet Explorer and Firefox. The default style sheet can be found at *application URL/opensearch/sru\_style.xsl*

## 12. Support Login

### 12.1. When You Need Support

If you have a problem or bug in your installation of intraLibrary, it may occasionally be necessary for a member of Intrallect's support team to get access to your repository. You can allow this by switching on "support access".

### 12.2. What Support Access Is

Enabling support access will create a temporary user with admin rights and send the login details to the Intrallect support team. This will grant the Intrallect support team temporary access to the application in order to diagnose the problem. The support user will persist until the support access is disabled.

In order for support access to work, the application must have enough capacity in its software licence to allow the addition of a new (temporary) user with contributor, librarian and administrator permissions.

### 12.3. Activating Support Access

In normal operation, the support section of the "Admin Tools" will include the message

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"support access is currently disabled", and a life-jacket icon. If you have been asked by a member of the Intrallect support team to activate support access in your installation of intraLibrary, click the life-jacket icon.

If you do not have enough capacity on your software licence, the page will display the message "it was not possible to enable support access as there was not enough capacity on your licence." If this happens, you need to take away contributor privileges from one of your existing users before you can enable support access.

#### **12.4. De-Activating Support Access**

When support access is active, the support section of the "Admin Tools" will display information about the status and identity of the support user.

If you click on the life-jacket icon, then the support login will be de-activated. Re-activating support access again will create a completely new login for the Intrallect support team.

## **13. Mail Configuration**

### **13.1. Email Basics**

When the intraLibrary system sends out emails, it uses the Simple Mail Transfer Protocol (SMTP). To do this, it must be able to connect to an SMTP server. An SMTP server accepts emails from sources it recognises, and relays the emails towards their destination via a chain of similar SMTP servers.

The SMTP server you use may be on your local network, or available on the internet. A non-local SMTP server will normally require a username and password before relaying emails.

### **13.2. Configuring the SMTP Settings**

The following settings are required for a non-authenticated SMTP server:

- **Server Description:** Anything you want to use to identify the SMTP server

- Server Name: The full domain (or IP) address of the SMTP server
  - Server Port: The IP port used to connect to the SMTP server (usually 25)
- The following additional settings are required for an authenticated SMTP server:
- Username: The username for authentication by the SMTP server (if any)
  - Password: The password for authentication by the SMTP server (if any)

The values you enter in these fields may well be the same as the configuration of your outgoing mail server in your normal mail client, e.g. Mozilla Thunderbird or Microsoft Outlook.

### 13.3. Testing Mail Settings

It can sometimes be difficult to be sure if you've got the SMTP settings right. The system can send out a test email to help you check everything is working.

To check the email connection is working:

1. enter your email address
2. click "Send Test Email"
3. check your email - you should receive an email with the return address that has been assigned to your intraLibrary installation, with a subject heading of "Testing IntraLibrary SMTP Server"

If you don't receive an email, first check your spam or junk folders to see if it ended up there. If not, then you need to go back and review your SMTP settings.

## 14. Metadata Reports

In the "reports" section of the "admin" tab, you can generate metadata reports in Excel or CSV format. These metadata reports list the values contained in selected metadata fields. Report configurations can be stored and reused as templates.

### 14.1. Configuring Metadata Reports

The following variables may be configured for reports by filling in the "Generate Metadata Reports" form:

- 
- **Report name:** A title for the report, which will be used in the Report Templates list in the left-hand pane to identify the report.
  - **Report filename:** The filename for the exported Excel or CSV file.
  - **Metadata fields:** Which metadata fields to include in the report.
  - **Multiplicity of metadata fields:** Maximum number of entries per metadata field. For instance, for the metadata field "1.6 Keyword", where a multiplicity of 5 is selected, the report will include the first five keywords for each resource reported on, with superfluous cells left blank where there are less than five keywords present.
  - **Language:** Which language you want the report to include. For instance, if you have metadata records in both English and Spanish, you can select whether the report will include English or Spanish values for the selected fields.
  - **Collections:** The report can include metadata from resources held in any or all collections in the library.
  - **Published or unpublished?:** The report can include metadata from unpublished resources only, published resources only, or both.
  - **Report dates:** Metadata will be included in the report from resources uploaded, last modified, or both, between the dates selected. Leaving the date fields blank means that resources uploaded or last modified at any time will be included. As dates have an implied time of 0000 this means that the start date is inclusive but the end date is exclusive.
  - **Report format:** Whether the report is to be exported in Excel or CSV format.

To create a report:

- Fill in the "Generate Metadata Reports" form.
- Click "Submit". Your browser will give you the option to open or save the report.
- You can clear the form at any time by clicking "clear report form" in the left-hand pane.

## 14.2. Saving Metadata Report Templates

To save a report configuration as a template:

- Fill in the "Generate Metadata Reports" form.
- Click "Save". The report template will then appear listed in the left-hand pane.
- To reuse a report template, click the "reuse/edit template" icon. The report form will be immediately filled in with your pre-selected configuration. You can use it exactly as is or change any part of it before clicking "Submit". To save any changes to the template click "Save" again.

## 14.3. Repository Statistics

The metadata reports page also displays a range of basic statistics about your local intraLibrary installation, including the total number of resources; the number of published and unpublished resources; the total number of users; the number of users in each role (i.e. guest, contributor, librarian and administrator); the number of groups and collections; and the number of users currently logged in ("Current user sessions").

This tab also gives you the version and build number of intraLibrary currently being used for your installation.

## 15. Quality Marks

Quality Marks are graphical icons that can be used to indicate a measure of quality - for example, that a resource has been through a particular quality assurance process. Different quality marks may be used to indicate different levels of quality compliance (.e.g. gold, silver, bronze). It is up to each organisation to decide how it wishes to use quality marks. This section describes how quality marks are made available to users in intraLibrary..

### 15.1. Configuring Quality Marks

To create a new quality mark click on the Add icon. Then complete the various items in the form. All items in this form are optional but Name, Image URL and Label are usually a minimum needed to be of practical use.

- **Name:** The name to be used when referring to the quality mark.
- **Image URL:** The URL of the image to be used as the quality mark icon. While there is no fixed size for this icon any dimension more than about 200 pixels will be quite dominant on the page on which it will appear. A size of around 150 x 150 is suitable although it needn't be square.
- **Description URL:** This is the URL that will be displayed if a user clicks on the quality mark icon.
- **Description:** This is the description used with the intraLibrary system to provide additional information about the icon. It is seen on the list of quality marks by administrators.
- **Preview:** Once an Image URL is set the preview button can be used to view the icon.
- **Labels:** Labels are the names used in the intraLibrary interface to refer to this icon, for example when selecting a quality mark to search for in advanced search. Labels only need to be provided for languages used in the intraLibrary interface.

Click on the Save button to store the information about this quality mark.

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## 15.2. Using Quality Marks

When an administrator sets up a quality mark it is not yet available to users. The only way a user sees a quality mark is if it is assigned to a resource, and the only way a quality mark is assigned to a resource is through the appropriate [workflow action](#).

# 16. Maintenance

## 16.1. Resource Cache

IntraLibrary uses a memory cache of resources to improve performance and reduce the load on the underlying database. The maximum number of resources stored in the cache is configurable. A larger number will generally improve performance if sufficient memory is available on the server. See the installation notes for more details.

Occasionally a resource may get corrupted in the cache. For example, all its metadata might appear to have been lost. If this happens, the cache can be rebuilt from the resource data stored in the database by clicking the *rebuild resource cache* button. 

## 16.2. Search Index (Re-index Metadata)

If a search in intraLibrary seems to be producing strange results, or is missing resources you think it should be finding, the first course of action should be to re-index the metadata. It's also important to do this if the search configuration is modified.

Re-indexing rebuilds the index the search engine uses to find resources that are relevant to a given query. Depending on the number of resources in the system, re-indexing could take a few seconds, a few minutes, or much longer. Re-indexing updates one metadata record at a time, so there is no major problem in re-indexing whilst users might be searching for resources.

## 16.3. Image Thumbnails

If your installation is configured to support thumbnailing of image resources, you will see a

button to "rebuild image thumbnails". Thumbnails will be created for all single images when they are uploaded into the repository. See the installation guide for more information and configuring the repository to support thumbnailing.

Occasionally it may be necessary to rebuild thumbnails for all the image resources. You might need to do this for the following reasons:

- You have just activated thumbnailing in a repository that already contains some image resources.
- You have changed one or more properties of the thumbnails, such as the thumbnail dimensions (see the intraLibrary **Installation Guide** for more information on how to do this).
- You can see some corrupt thumbnails appearing in the search results. In normal circumstances, this should not happen.

If you need to rebuild thumbnails for any reason, click the "rebuild image thumbnails" button. Rebuilding the thumbnails for a large number of image resources can take a while. Whilst thumbnails are being rebuilt, the "rebuild image thumbnails" button will be greyed out every time you visit the "system" page.

A message below the "rebuild image thumbnails" link tells you what the current thumbnails settings are. For example it might say:

- *Current thumbnail dimensions are 75px square for small thumbnails, 200px wide for large thumbnails and are of quality 7/10.*

### 16.4. Metadata Templates

If you have made changes or additions to the [metadata templates](#), you will need to use the *Reload templates* link to reload the templates before your changes take effect.

### 16.5. Embed Codes

When embed codes have been updated, or to use embed codes for the first time, it is necessary to click on the reload button to reload the embed code files. More information about using embed codes is available in the section [Using Embed Codes](#).



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## 17. Harvesting

Harvesting enables intraLibrary to gather metadata about resources in remote repositories and create entries for these resources (as web resources) in the local repository so that they can be searched and discovered and used as if they were in the local repository.

For harvesting to work, the remote repository must support OAI-PMH the Open Archive Initiative Protocol for Metadata Harvesting. Several repository systems support this protocol, including intraLibrary, so this mechanism can be used to harvest between intraLibrary systems or others.

By default OAI-PMH supports Dublin Core metadata but intraLibrary additionally supports LOM metadata so harvesting between intraLibrary systems allows the richer LOM metadata to be harvested.

### 17.1. Configuring Harvesting

To set up a harvest click the "Create a New Harvest" icon. Then complete the necessary information:

- Harvest Name: The name you want to use to refer to this harvest.
- Remote Repository URL: This must be the URL of the remote repository's OAI service. Examples include *http://open.jorum.ac.uk/oai/request?* or *http://3p7migration.intralibrary.com/IntraLibrary-OAI*. Click on "Load Remote Repository Details". If the remote repository URL is correct this will request from the remote repository a list of sets available for harvest.
- Set to be harvested: Select the set from the list provided by the remote repository.
- Harvested metadata format: In many cases Dublin Core (oai\_dc) will be the only option but intraLibrary repositories will also offer LOM metadata. These options are provided by the remote repository.
- Type of Harvest: Initially it is usual to select "All Records". After a harvest has been successful a "From Date" harvest will be useful for updates. When the harvest is up and running it will automatically carry out a From Date harvest daily using the "last successful harvest" date.
- Time of Harvest: The time using a 24 hour clock (e.g. 03:45) at which the harvest should run. It will continue to run on a daily basis at this time until it is stopped.
- Select a group/process: Select the appropriate workflow process to be used for this harvest. Only those workflows with the "Import from Harvest" [workflow action](#). will be available.

- **intraLibrary Collection:** Select the collection into which the harvested records will be placed. Though you may place these records in any collection it is often useful to have a specific collection for harvested resources so that they can be easily managed and access-controlled.

Click on "Save Details" to have this harvest saved and implemented. If you do not want to initiate this harvest click on "Return to Harvests without saving".

### 17.2. Monitoring Harvesting

Once initiated, you will see the "Harvest Jobs Set to Run" at the bottom of the Harvest Details page. The tab "Previous Runs of this Harvest" will display details of harvest jobs that have previously been carried out for this harvest configuration.

## 18. Kaltura

Kaltura is not a standard part of intraLibrary. The Kaltura section will only appear on the Admin menus if Kaltura has been installed and specified in the intralibrary.properties file (`enableKalturaIntegration=true`) on installation. This section can be ignored if Kaltura is not installed.

The remainder of this section assumes an understanding of Kaltura Publisher configuration. IntraLibrary integrates with a single Kaltura Publisher. The necessary settings on Kaltura are found on the Kaltura > Settings > Integration Settings page. The settings should be:

- Do you want to receive server notifications: Yes
- Notification URL: `http://<intraLibrary-URL>/IntraLibrary-REST/KalturaCallback/update` where `<intraLibrary-URL>` should be your intraLibrary Application URL
- Notifications: Ensure that the following items in the Sent by Server column are checked: Add Entry; Update Entry Thumbnail; Update Entry
- Advanced Settings: Set the User Upload Limit, e.g. 1000MB. This will be the limit for file sizes uploaded to Kaltura. This is independent of the file upload limit on intraLibrary. Files designated for Kaltura will have this limit applied, all other files will have the intraLibrary limit applied.
- Note the partner ID - you will need this later.

On the Kaltura > Settings > Transcoding Settings page check all the "flavors" you wish to have transcoded.

Having set up these Kaltura settings the intraLibrary configuration can be completed:

- 
- Kaltura URL: The base URL of the Kaltura Instance.
  - Publisher ID: Usually the email address of the Kaltura Publisher
  - Publisher Password: The password associated with the publisher ID
  - Partner ID: The Partner ID is found on the Kaltura Integration Settings Page
  - Explanation text: This text appears at the top of the Kaltura Upload page. It may be useful to remind people to set their profile to have a long logout period if they are uploading large files.

Click on Save/Refresh. This will connect intraLibrary to Kaltura. If you change any details you should use this button to update the details.

The Kaltura Player can be selected from one of the available Kaltura Players available to this publisher. If you create additional Players in Kaltura, click Save/Refresh to update this list. Select one Player. This will be the Player used when a Kaltura file is viewed through a link or embed code. If you change this in future the new Player will apply to all files including those previously uploaded.

Select the file types you wish to handle through Kaltura. Note that it is still possible to upload a file of any of these types to intraLibrary. To upload to intraLibrary use the Upload icon to upload to Kaltura use the Kaltura icon.

Remember to Save/Refresh if you have made changes.

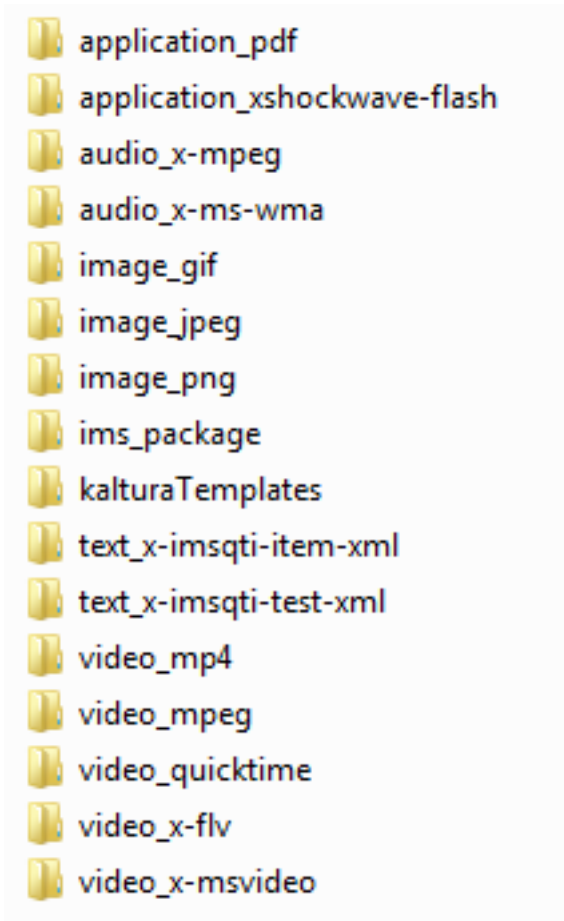
Kaltura is now configured for use. However, the Kaltura upload icon will only appear on a user toolbar if that user has access to a workflow that includes the appropriate [workflow action](#). "Kaltura upload".

## 19. Using Embed Codes

IntraLibrary can provide embed codes for any resource. These codes are available on the resource page and can be easily cut and paste by a user to embed the resource in any web page. Embed codes are completely configurable, updatable and extendable and this section explains how to manage embed codes.

### 19.1. Location and Structure of Embed Codes

All the information relating to embed codes is stored on the intraLibrary server in the embedCodeTemplates folder of the *config* directory. That folder has the following contents when intraLibrary is released:



Each folder corresponds to a type of resource in intraLibrary. In most cases these resources are identifiable from their mime type. For example a mime-type of image/jpeg corresponds to a folder name of image\_jpeg. To create a new embed code for an existing mime type a folder must be created with a name which replaces / with \_. A list of existing mime type in intraLibrary can be found in Admin > Vocabularies in the Intrallect Technical Format vocabulary.

Not every folder in embedCodesTemplates is a representation of a mime type. There are a few exceptions. Specifically *ims\_package* and *kalturaTemplates*. In these two cases the

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embed code is applied, as expected, to IMS content packages and files stored in Kaltura (using the Kaltura embed code) neither of which have equivalent mime types.

In each folder is a single file called embedCode.txt. That folder should contain the embed code as described in the next section

## 19.2. Creating or Modifying Embed Codes

To modify an existing embed code, whether to change a parameter such as its size or to completely replace it using a new technology, simply edit the text in the appropriate embedCode.txt file. Then refresh the embedCodes in the Admin > Maintenance section of intraLibrary to make intraLibrary read the new file.

To create a completely new embed code for a mime type that currently has no embed code simply create a new folder with a name derived from the mime type. In that folder create a file called embedCode.txt which contains the code you want to surround the file with. The file itself should be represented by the macro {locationUrl} wherever it should appear. The following example is the embedCode from video\_x-flv:

```
<object width="300" height="200">
<param name="movie" value="http://fpdownload.adobe.com/strobe/FlashMediaPlayback.swf">
</param>
<param name="flashvars"
value="{locationUrl}&controlBarAutoHide=false&loop=true&autoplay=false ">
</param>
<param name="allowFullScreen" value="true"></param>
<param name="allowscriptaccess" value="always"></param>
<embed src="http://fpdownload.adobe.com/strobe/FlashMediaPlayback.swf"
type="application/x-shockwave-flash"
allowscriptaccess="always" allowfullscreen="true" width="300" height="200"
flashvars="src={locationUrl}&controlBarAutoHide=false&loop=true&autoplay=true">
</embed>
</object>
```

Note that KalturaTemplates is a special case and the {locationUrl} should not be used for Kaltura. When editing Kaltura embed codes the following macros are allowable:

- {kalturaUrl} The URL of the Kaltura application.
- {partnerId} The value corresponding to the partner ID.
- {url} The URL for the video resource.
- {thumbnailUrl} The URL of the thumbnail image for the resource.

In the case of kalturaTemplates it is recommended to keep the distributed embedCode.txt as a reference.

Remember to refresh the embedCodes in the Admin > Maintenance section of intraLibrary to make intraLibrary read the new file.

## 20. Metadata Templates

### 20.1. Introducing Metadata Templates

To save the user having to repetitively enter easily definable metadata values, intraLibrary can optionally populate metadata records with pre-defined values. These pre-defined, or default, values are defined in stored *templates* which must themselves be valid IMS Metadata records in XML format. In these *metadata templates* any metadata field can be assigned a default value, or multiple default values where appropriate.

### 20.2. Creating Metadata Templates

Metadata templates are defined using XML files which follow the IMS Learning Resource Metadata XML Schema. These files must be placed in the *config* directory of your intraLibrary installation, inside a folder called *metadataTemplates*. An easy way to create a metadata template is to create a dummy resource in intraLibrary with the metadata properties you want. You can then export an IMS Learning Resource Metadata record from this resource, and use the resulting XML file as the basis for your new metadata template. The filename of the metadata template must be of the form *templatename.xml*.

When you have added or updated templates in the metadataTemplates folder, you need to click *Reload Templates* in the *system* section of the intraLibrary admin tools to update the templates used inside intraLibrary. Templates will appear in the relevant drop-down list in the user preferences page. The name of each template will be the name of the file with the *.xml* suffix removed. There is a template called *default* that is supplied with the system. You can overwrite this by creating your own *default.xml* template in the *metadataTemplates*

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folder. Templates are also made available to users in the Metadata Editor in their work area, so that they can be applied while editing metadata.

### 20.3. Service Result Templates

The system can also be configured to apply metadata templates to records exposed to external systems via service interfaces. You may wish, for example, to ensure that a particular copyright statement appears in metadata records harvested via an OAI-PMH service, or that a particular field is populated with a Public URL when using SRU to query your repository from your website. More information about these interfaces can be found in the intraLibrary **Integration Guide**.

The following options are available in the [Metadata Options](#) section of the [system](#) page:

- Metadata template to apply to search results
  - values and macros in the selected template will overwrite the values stored in the relevant fields of each record returned in a search request.
- Metadata template to apply to harvested results
  - values and macros in the selected template will overwrite the values stored in the relevant fields of each record returned in a harvest request.

### 20.4. Template Format

Metadata templates are defined in XML files which follow the IMS Learning Resource Metadata XML Schema. Any property of the IMS/IEEE LOM metadata model can be defined in a metadata template. The metadata fields in a template can be populated either by static strings, or dynamic macros generated using information available to intraLibrary.

Metadata template macros can be called up using the macro name in curly brackets, such as {UserFullName}. A complete list of metadata template macros is given in [Appendix 1: Metadata Template Macros](#). Metadata template macros cannot currently be called up as part of another string, so including *The user who wrote this is {UserFullName}* in the *copyright.description* field won't work.

The following example shows how you can mix static strings and metadata template macros in the lifecycle section of a template defined IMS Learning Resource Metadata (XML) format:

```

<lifecycle>
<contribute>
<role>
<source>
<langstring xml:lang="x-none">LOMv1.0</langstring>
</source>
<value>
<langstring xml:lang="x-none">Author</langstring>
</value>
</role>
<centity>
<vcard>{UserVCard}</vcard>
</centity>
<date>
<datetime>{NowCurrentDate}</datetime>
</date>
</contribute>
</lifecycle>

```

You can use an XML Editor to compose and validate your metadata template. Using some of the metadata template macros in particular fields may cause a validation error, but this does not necessarily mean your template will not work in intraLibrary. For example, using the {ObjectFileSize} macro in the technical.size field of the metadata will cause a validation error, because the XML Schema requires this element to contain a number. Therefore, if you are using a validating editor such as XML Spy, it is probably best to insert the metadata template macro after you have finalised and validated the overall structure of your template.

## 21. Email Templates

There are eleven different types of email alerts which can be sent by intraLibrary. These alerts are used to notify users about changes to resources such as when a resource has passed from one stage to another, when a resource has been published and when a resource has been annotated. Though there are twelve template files in the mailTemplates folders the file registrationNotificationEmail.txt is not for use in standard intraLibrary configurations.



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### 21.1. Email Alerts for Stage Change

There are three types of alerts that can be used to notify users about resources moving from one stage to another. They are (names of templates in brackets):

- Letting individual users know about stage changes to a resource (stageChangeEmail.txt):  
An individual user can choose to receive an email when a resource enters a stage they have access to. This option is chosen by the individual user from the groups section of their profile page. The email template for this alert is StateChangeEmail.txt which is stored in the email templates directory in the configuration directory on the intraLibrary installation server.
- Letting external people know about stage changes to a resource (stageChangeExternalUserEmail.txt):  
When writing the xml for a workflow, it is possible to include an action "Email addresses to alert" followed by email addresses and alerts will be sent when the stage is completed (see section on workflows for more details). The template for this alert is StageChangeExternalEmail.txt which is stored in the email templates directory in the configuration directory on the intraLibrary installation server.
- Letting the resource owner know about stage changes to a resource (stageChangeObjectOwnerEmail.txt):  
The workflow template also has an action to "alert the resource owner" and this will alert the resource owner when the resource changes state (see sections on workflows for more details). The template for this alert is "StateChangeObjectOwnerEmail.txt" which is stored in the email templates directory in the configuration directory on the intraLibrary installation server.

### 21.2. Email Alerts for Publication of Resource

There are two types of alerts which can be used to notify users when a resource has been published. They are:

- Publication notification for user (userPublishNotificationEmail.txt):  
An individual user can select the "send notification email" box from "preferences" on their "profile" screen. The email template for this is "UserPublishNotificationEmail.txt" which is stored in the email templates directory on the configuration directory on the server.
- Publish notification for external user (adminPublishNotificationEmail.txt):  
The administrator can decide who receives alerts when a resource has been published in the repository. This is entered at the foot of the "Mail" section which is part of the "admin tools page". Any number of email addresses can be chosen to receive a message when a resource is published in a repository. The text for the message is "adminPublishNotificationEmail.txt" which is stored in the email templates directory in

the configuration directory on the intraLibrary installation server.

### 21.3. Email Alerts for Annotation of a Resource

The administrator can choose to send an alert to all administrators and/or all librarians when a resource has been commented on or tagged by a user. This is done through the "User Options" section of the "admin tools page". The text for this alert can be altered by changing the "annotationNotificationEmail.txt" or "tagNotificationEmail.txt" which are stored in the emailTemplates sub-directory in the configuration directory.

Users can also select in the "preferences" page of their "profile" to receive an email when anyone tags or comments on their resources. The email templates for these are also in the email templates sub-directory and are "objectOwnerAnnotationNotificationEmail.txt" and "objectOwnerTagNotificationEmail.txt".

### 21.4. Email Alerts for Reporting Abuse or Problems

Reporting problems and abuse are enabled when the administrator sets up Collection Managers with these powers. Emails reporting problems and abuse are sent to collection managers based on the templates reportAbuseEmail.txt and reportProblemEmail.txt

### 21.5. Configuring the Email Templates

In the above section different types of email notifications were considered. The text for these email notifications can be modified by the administrator by altering the templates which are contained in the emailTemplates directory on the configuration directory on the server in which intraLibrary is installed. Note that if language specific directories exist (en=English, es=Spanish) the template files in each language directory should be used. The example below shows a sample template for an email about a resource changing state (stageChangeEmail.txt). There is a list of the macros which can be used for each template in the section on [Email Template Macros](#).

**A new learning object is now available.**

---

Click on the link below to preview the resource:

\_\_url\_\_

title:

\_\_title\_\_

description:

\_\_description\_\_

comment:

\_\_comment\_\_

classifications:

\_\_classifications\_\_

This message was sent to you by the administrator of intraLibrary.

## 21.6. Email Template Macros

The following macros can be used by all the email templates.

Variable	Description
__repositoryName__	Name of the repository which the resource is stored in
__url__	The public URL of the resource
__title__	Name of the repository which the resource is stored in
__description__	The description of the resource (from metadata field "description")
__currentStage__	The stage which the resource is currently in
__currentWorkflow__	The workflow which the resource is currently in
__classifications__	List of all taxonpaths which the resource is classified under

The following variables are available for use in each email template except the annotation notification email.

Variable	Description
__publisher__	Name of the person publishing or moving the resource
__comment__	Comment made when moving the resource

The following variables are available for use only in the report a problem, report abuse and annotation notification email.

Variable	Description
__username__	Name of the person performing an annotation or reporting abuse/problem.

The following variables are available for use only in the report a problem and report abuse emails.

Variable	Description
__object_home_url__	The URL of the object which is being reported on
__object_title__	The title of the object which is being reported on
__full_name__	The full name of the person making the report
__email_address__	The email address of the person making the report
__timestamp__	The date and time that the report was made

The following variables are available only on the annotation notification email (annotationNotificationEmail.txt)

Variable	Description
__annotation_text__	The text body of the annotation (comment) which has been written by the user
__star_rating__	Star rating
__tagstrings__	Tags
__annotation_date__	Date of the annotation

The following variables are available for use only in the report abuse email.

Variable	Description
__annotator_username__	Username of the person whose annotation is being reported
__annotator_full_name__	Full name of the person whose annotation is being reported
__annotator_email_address__	Email address of the person whose annotation is being reported
__annotation__	The text of the annotation being reported.

The following variables are available for use only in the report a problem email.

Variable	Description
__user_agent__	The browser details of the user reporting a problem.

## 22. Appendix 1: Metadata Template Macros

The macros available for populating metadata templates are:

Property	Description	Possible Uses (target metadata fields)
<b>Properties of the user</b>		
{UserFullName}	User Account	The full name of the user, as stored in the user profile
{UserAffiliation}	The affiliation (employer, institution or project) of the user, as stored in the user profile	
{UserEmail}	The email address of the user, as stored in the user profile	
{UserPreferredLanguage}	The language the user has chosen as their preferred language in their user profile	general.language metametadata.language educational.language
{UserUsername}	The intraLibrary username of the user	
{UserVCard}	Returns the user's stored details in vcard format	lifecycle.contribute.centity metametadata.contribute.centity annotation.centity
<b>Properties related to the current date / time</b>		
{NowCurrentDate}	Current date in UTC format	lifecycle.contribute.datetime metametadata.contribute.datetime annotation.datetime

{NowGuid}	A globally unique identifier (GUID) generated using the current time	
<b>Properties of the resource</b>		
{ObjectMimeType}	Mime type of resource matched by file extension	technical.format
{ObjectPublicURL}	Full Public URL for this resource for this user	technical.location
{ObjectFileSize}	Size in bytes of uploaded file or package .zip file	technical.size
{ObjectAggregationLevel}	Not currently supported Placeholder for an automatically generated value of 1-4 depending on predefined rules for assessing the complexity or granularity of a resource	
{ObjectCreationDate}	Date of creation, extracted from metadata in digital file. Currently supported for JPEG images (exif:DateTimeOriginal) only	lifecycle.contribute.date
{ObjectCreator}	Author/creator of digital resource, extracted from metadata in digital file. Currently supported for JPEG images (tiff:Artist) only	lifecycle.contribute.centity
{ObjectFilename}	Returns filename of uploaded single file, or filename of package .zip	general.title

	file	
{ObjectId}	The OAI identifier of the resource	general.catalogentry.entry
{ObjectLocalID}	The number of the resource in the repository	general.catalogentry.entry
{ObjectPublicManifestURL}	A Public URL allowing download of the resource's content package manifest, for this user	
{ObjectPublicURLAsZIP}	A Public URL allowing download of the resource as a .zip file IMS Content Package, for this user	
<b>Properties of the repository</b>		
{RepositoryName}	The name given to the intraLibrary repository in the properties file	
{RepositoryId}	OAI identifier of the intraLibrary repository assigned in the properties file	
{RepositoryAdminEmail}	Email address of the repository administrator	
<b>Properties of application profiles</b>		
{ApplicationProfileName}	The recognised name of the application profile, e.g. "CanCore"	metametadata.metadatascheme
{ApplicationProfileSource}	The authoritative source for the application profile	
{ApplicationProfileVersion}	Version number of the application profile	
<b>Properties of JPEG images (extracted from EXIF metadata)</b>		

{ImageCompressionScheme}	tiff:Compression	Z39.87: Compression.CompressionScheme
{ImageCompressionRatio}	exif:CompressedBitsPerPixel	Z39.87: Compression.CompressionLevel
{ImagePixelWidth}	exif:PixelXDimension	Z39.87: ImageWidth
{ImagePixelHeight}	exif:PixelYDimension	Z39.87: ImageLength
{ImageCameraMake}	tiff:Make	Z39.87: DigitalCameraManufacturer
{ImageCameraModel}	tiff:Model	Z39.87: DigitalCameraModel
{ImageOrientation}	tiff:Orientation	Z39.87: Orientation
{ObjectCreationDate}	Date of creation, extracted from metadata in digital file. Currently supported for JPEG images (exif:DateTimeOriginal) only	lifecycle.contribute.date
{ObjectCreator}	Author/creator of digital resource, extracted from metadata in digital file. Currently supported for JPEG images (tiff:Artist) only	lifecycle.contribute.centity