# Introduction to DSpace

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## Topics

- ✓ Introduction: About DSpace and the Texas Digital Library
- ✓ DSpace Basics
- ✓ Ingesting Content
- ✓ Workflows and Roles
- ✓ Metadata
- ✓ Other things that are good to know





# Introduction

DSPACE AND THE TDL





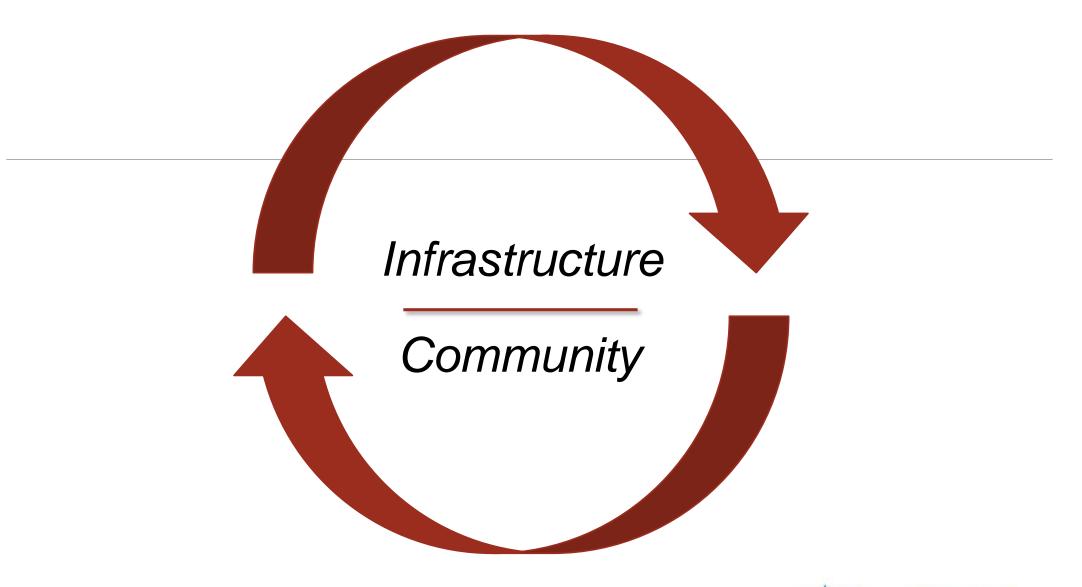


The Texas Digital Library is a consortium of libraries

that works together to support *greater access* to the riches of Texas academic institutions.











## DSpace

Open source software for digital repositories

Started in 2002 from developers at MIT and HP Labs

Active development community

Over 1000 organizations use DSpace

Primarily research/higher education





The TDL is a Platinum Member of DuraSpace, the sponsoring organization of DSpace.





# DSpace Basics

COMMUNITIES AND COLLECTIONS, LOGGING IN, NAVIGATING THE ADMIN INTERFACE





## Features

- ☐ Full-text searchable (any text-based file)
- ☐ Discovery: search/browse in the DSpace interface, handles (Faceted browse)
- ☐ Can handle any type of file (file=bitstream); best known for text-based files
- ☐ Optimized for indexing in Google and Google Scholar
- ☐ Persistent URLs (Handle system)







# Examples of DSpace

- http://repositories.lib.utexas.edu
- <u>http://repository.tamu.edu/</u>
- http://repositories.tdl.org/ttu
- http://repositories.tdl.org/utmb
- https://repositories.tdl.org/uh-ir/
- <u>http://repositories.tdl.org/tamug/</u>





# Repository Structure:

### Communities and Collections

Community – highest level of DSpace hierarchy; can contain sub-communities and/or collections

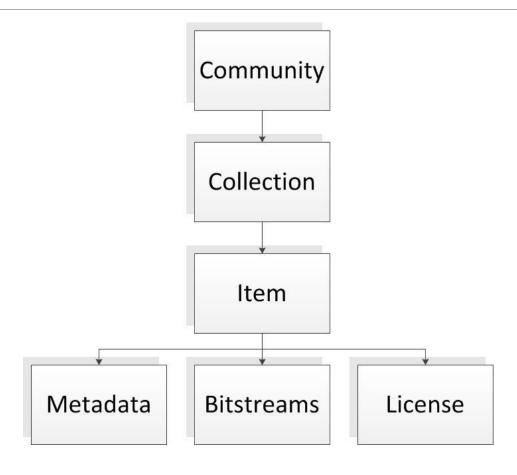
Sub-Community (optional) – if used, contain collections or additional nested sub-communities

**Collection – Contain items** 

Item – Contain bitstreams (i.e. files), metadata, and license



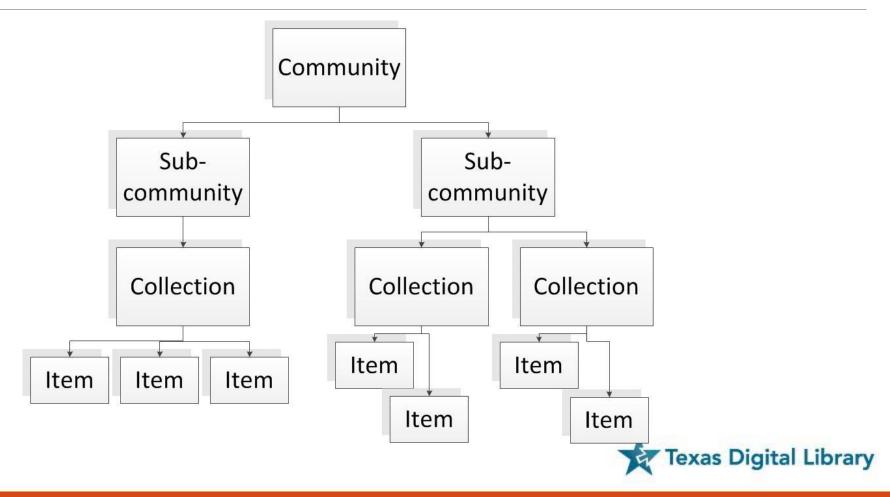
# Repository structure: Example #1





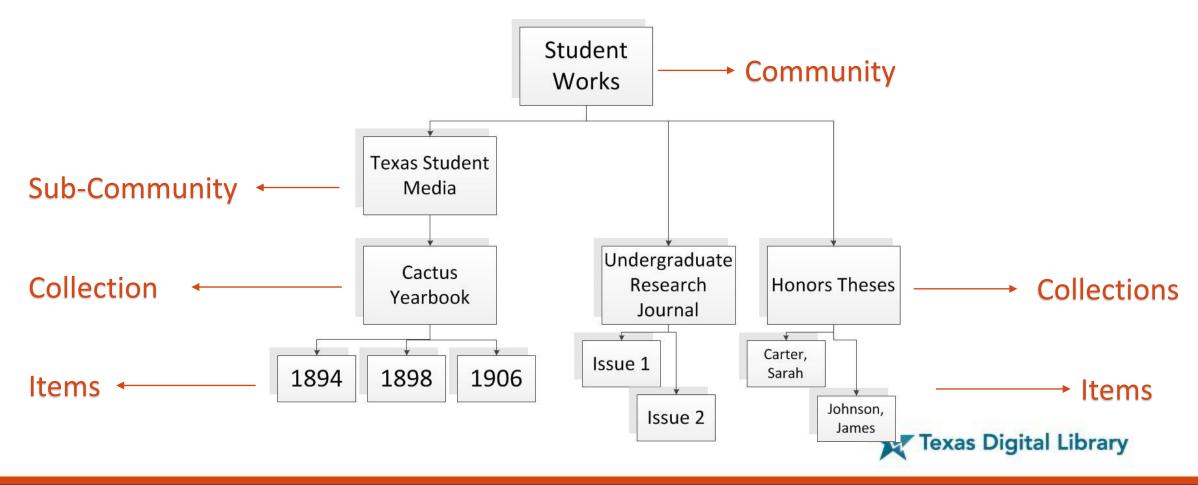


# Repository structure: Example #2





# Example from UT Digital Repository





# Community Structure in TAMUG Repository

Community

**Sub-Community** 

**Collections** 

#### Communities in the Repository

Select a community to browse its collections.

- Faculty Scholarly Works
  - General Academics Department (GACD)
  - Marine Biology Department (MARB)
  - Marine Engineering Technology Department (MARR)
  - Marine Sciences Department (MARS)
  - Marine Transportation Department (MART)
  - Maritime Administration Department (MARA)
  - Offshore & Coastal Systems Engineering Department (OCSE)
  - Sargassum Early Advisory System (SEAS)
    - Azores historic weather
    - Effects of Sargassum on West End Beaches Galveston 2006
    - Galveston Historic Beach Profiles
      - Beach Profile Monitoring 2002
      - Beach Profile Monitoring 2006
      - Old Profiles 1966-1980
      - Profile 2007-2008
- Galveston Bay Information Center
  - Galveston Bay Bibliography
  - Beach Management Information Portal
    - Galveston Island Park Board, March 2014
- Library Special Collections, Marine and Maritime Collection
  - Laffite Society Collection
  - Maps
  - Special Collections
  - Laffite Society
    - Laffite Seminar

Above: Communities and Collections in the Texas A&M at Galveston Repository



# Logging into DSpace



The TDL uses "Shibboleth" to manage authentication with our services.

Shibboleth lets you log in using your university credentials.

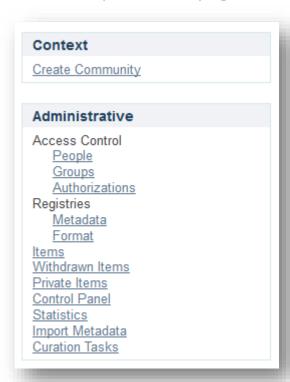
- Training DSpace installation: <a href="https://dspace41-demo.tdl.org/demo-ir/">https://dspace41-demo.tdl.org/demo-ir/</a>
- There's no Shibboleth on the training box. Log in using provided student
  login credentials: <a href="mailto:tdl.studentX@gmail.com">tdl.studentX@gmail.com</a> where X is the number on the
  yellow sticky note (password: tdlstudent)



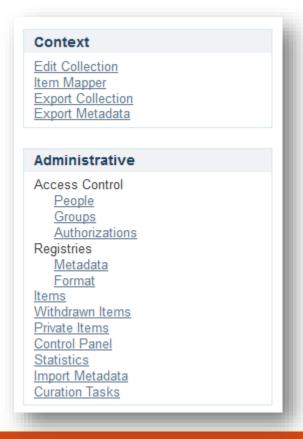
## Context Clues

Available actions change as you navigate through the interface.

On the DSpace homepage



On a Collection page



On an item page



## How To:

Create a Sub-community.

Assign an Administrator to your Subcommunity.

- 1. Go to <a href="https://dspace41-demo.tdl.org/demo-ir/">https://dspace41-demo.tdl.org/demo-ir/</a> (Make sure you are logged in to DSpace.)
- Navigate to the "UHCL Training Community"
- 3. Click on Create Sub-community
- 4. Give your Sub-community a name, provide introductory text, and click on Create.
- 5. Click on the Assign Roles tab
- 6. Click on Create to assign Administrators
- 7. Add <a href="mailto:kristipark@yahoo.com">kristipark@yahoo.com</a> as an Administrator.

Note: Addition of the administrative user automatically creates a "Group" called "COMMUNITY\_X\_ADMIN."





### How To:

Create a new Collection within your Sub-Community.

Assign an Administrator to your Collection.

- Navigate to the Sub-Community you just created.
- 2. Click on Create Collection.
- 3. Give your collection a name, provide some introductory text, and click on Create.
- 4. On "Assign Roles" tab, click Create next to Administrators.
- 5. Add [username] as an Administrator for the Collection.

Note: Initially, when you add a user as Administrator, the user will appear as "Pending" until you click SAVE.





## How To:

Edit an existing Collection.

- 1. Return to DSpace Home
- 2. Navigate to the Collection you just created.
- 3. Under Context, click on Edit Collection.
- 4. Edit any metadata for the collection and upload an image under "Upload new logo."
- 5. Click Save updates.





# Case Study: SEAS Community

Sargassum Early Awareness System Community in the Texas A&M at Galveston Repository

#### Sargassum Early Advisory System (SEAS)

- Azores historic weather
- Effects of Sargassum on West End Beaches Galveston 2006
- Galveston Historic Beach Profiles
  - Beach Profile Monitoring 2002
  - Beach Profile Monitoring 2006
  - Old Profiles 1966-1980
  - Profile 2007-2008



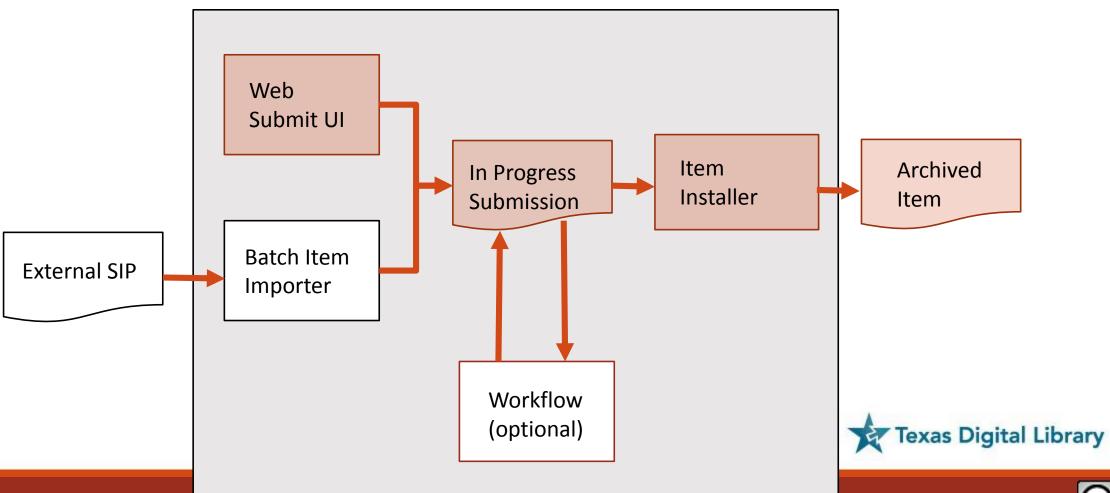
# Ingesting Content

SUBMISSION WORKFLOW





# Ingest Process





## Starting a new submission

Users with "submit" privileges will see a "Submissions" link under My Account.

Click "Start a New Submission" to begin.

#### My Account

<u>Logout</u>

<u>Profile</u>

Submissions

#### Submissions & Workflow tasks

#### Submissions

You may start a new submission.

The submission process includes describing the item and uploading the file(s) comprising it. Each community or collection may set its own submission policy.

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## Submission Steps

#### Select a Collection

 Only collections on which you have "submit" privileges will appear.



## Describe the item (3 screens)

• Title and Date of Publication are required.



#### Determine access

- Make item private? Item will not be searchable.
- Set up limited embargo? –
   Provide future date for access



#### Upload file(s)

- Upload one or multiple files
- Edit metadata specific to each bitstream, including embargo info.



If Collection has no workflow steps, and you did not replace any restrictions on access, the item will be immediately available in DSpace

#### Complete submission

• Click "Complete submission.".



#### Agree to license

• Agree to license



#### Review

Review information and make corrections.





## Practice

Submit an Item to your Collection.

- 1. Click "Submissions"
- 2. Click "start another submission."
- 3. Select a collection and click Next.
- 4. Proceed through the workflow. Upload one or multiple files from desktop folder.





# Editing Items

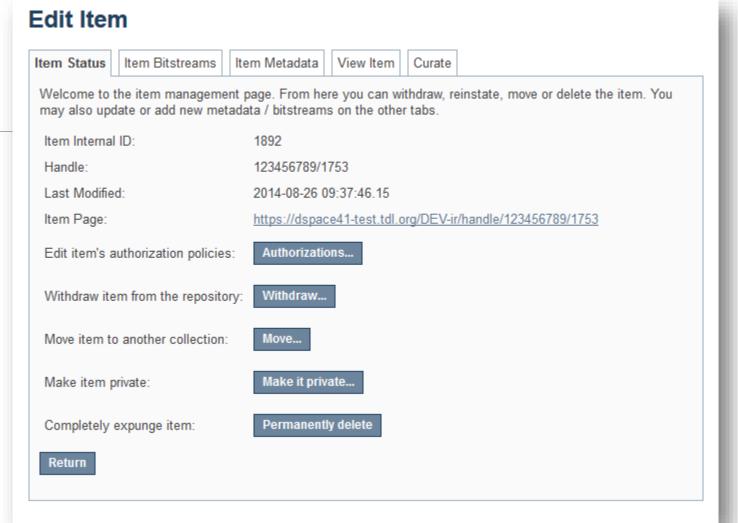
Moving items to a different collection

Making an item private

Replacing or modifying bitstreams

Reordering bitstreams

Editing item metadata



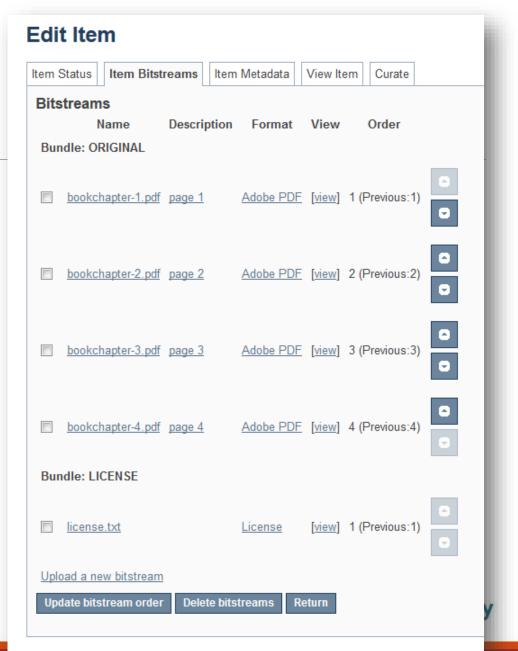




## Reorder bitstreams

In items with multiple files (i.e. bitstreams), an administrator can reorder the files after submission.

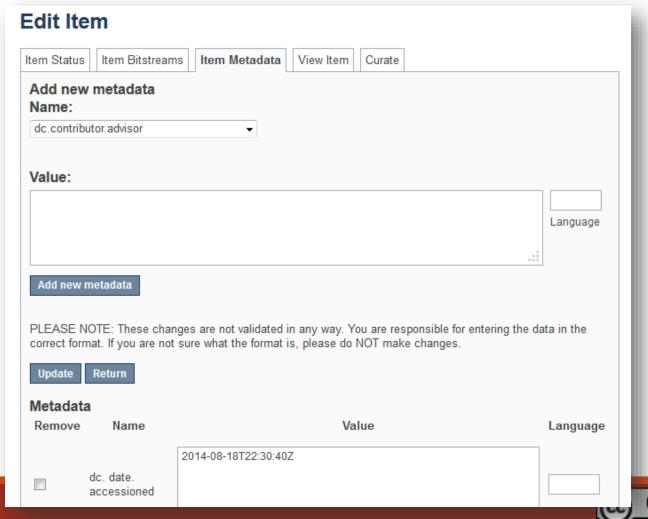
- 1. Complete submission of item.
- Navigate to collection and item just submitted.
- 3. "Edit this item." => Item Bitstreams tab
- 4. Use arrows on right side to reorder the files





# Editing Item Metadata

- 1. Navigate to the Item
- 2. Click "Edit this item" under "Context."
- 3. Go to "Item Metadata" tab.
- Edit existing metadata, or add new fields.





# Roles and Workflows

E-PEOPLE, GROUPS, AUTHORIZATION





# Roles within DSpace

More privileges Fewer privileges

Repository Administrator

**Community Administrator** 

**Collection Administrator** 

Reviewer OR Submitter

Reader





## E-People and Groups

E-People and Groups are the way DSpace identifies users for the purpose of granting privileges.

#### E-Person = User Account

- An E-Person can be granted certain privileges within DSpace.
- ➤ In TDL-hosted systems, an E-Person is created when a user logs in for the first time.

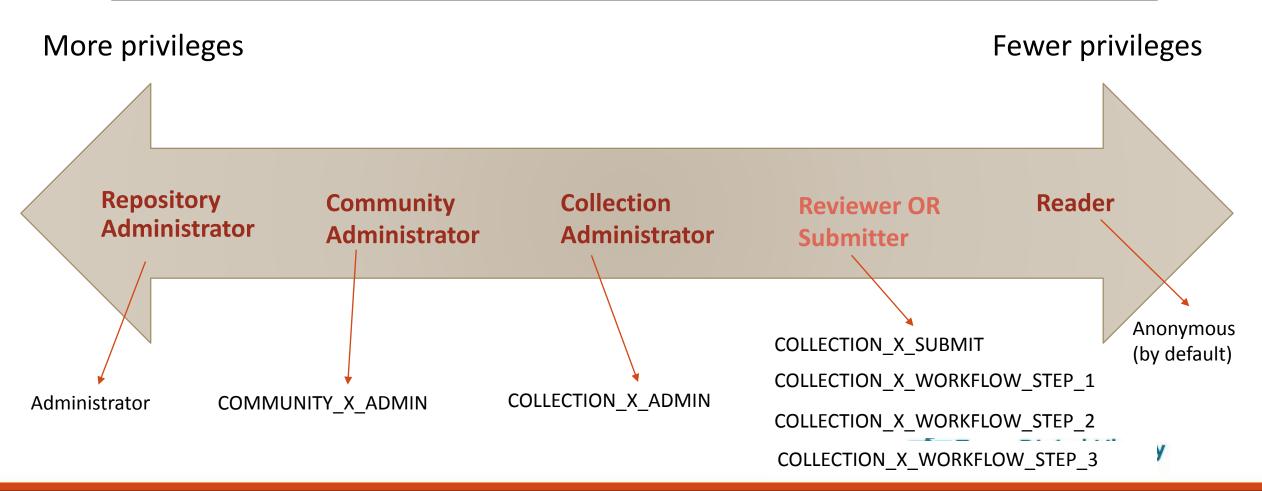
#### Groups = a list of E-People

- Groups can be granted permissions.
- Anyone listed in the group gets the permissions granted to the group.
- Two default groups in DSpace: Administrator and Anonymous





# Roles and Groups



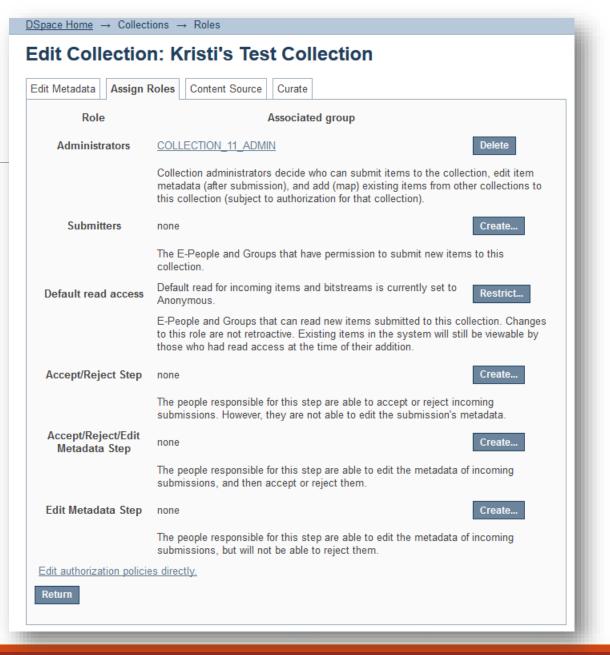


# Managing Groups Method #1

### Edit Collection => Assign Roles

- Create a group of Collection
   Administrators
- Create a group of Submitters
- Create a specified Group who can access materials (default is "anonymous")
- Create Workflow Steps (more on this later)

**To create a Group:** Click "Create" (or "Restrict"), search for and add E-People to the group, click SAVE.



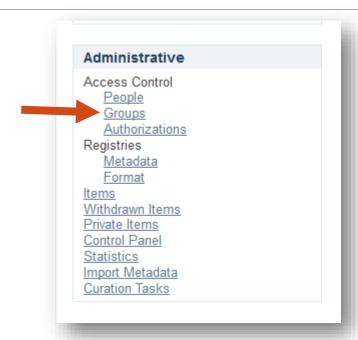


# Managing Groups (Method #2)

### Access Control => Groups

**To create a Group:** Click "Click here to add a new Group," give new Group a name, search for and add E-People to the group, click SAVE.

**Note:** No privileges are attached to any groups created through this method. But groups created here are available to be authorized in other parts of the interface.







## Workflows

Without a Workflow in place, items submitted to a Collection in DSpace will automatically be archived and published.

Workflows allow for one, or multiple, steps for reviewing submissions and editing metadata prior to publication.

- A Workflow can have 1, 2, or 3 steps.
- Each step will have an E-Person Group attached.







## Available Workflow Steps

### Step 1

 Can accept or reject submission

### Step 2

Edit
 metadata;
 accept or
 reject
 submission

### Step 3

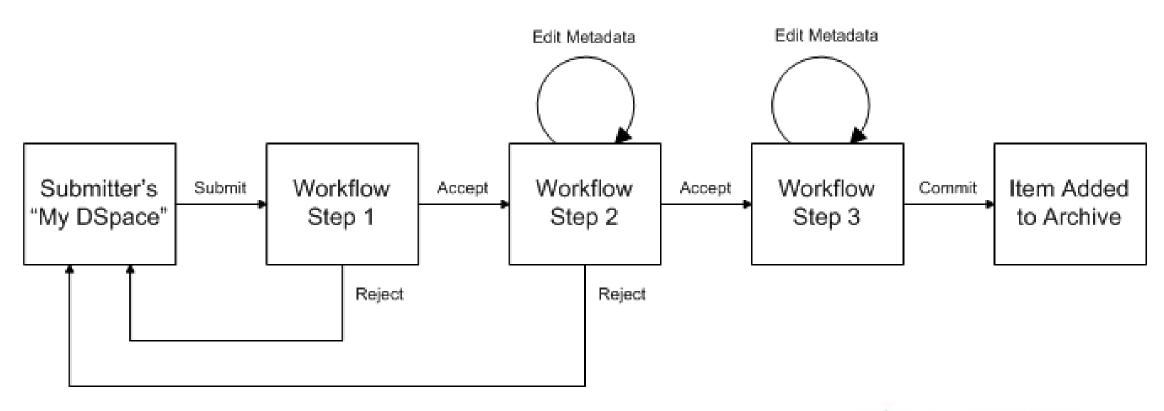
Edit
 metadata
 and publish;
 cannot
 reject

Notes: A collection might have one or all of these steps. It could have any one of these steps but not the other two.

Texas Digital Library



# A Workflow with all three steps







# Creating a Collection Workflow

#### Edit Collection => Assign Roles

- Create a Group for the Workflow step(s) you want.
- A Step without a Group does not exist.

Accept/Reject Step	none	Create
	The people responsible for this step are able to accept or reje- submissions. However, they are not able to edit the submission	_
Accept/Reject/Edit Metadata Step	none	Create
	The people responsible for this step are able to edit the metad submissions, and then accept or reject them.	data of incoming
Edit Metadata Step	none	Create
	The people responsible for this step are able to edit the metad submissions, but will not be able to reject them.	data of incoming





### Working within a Workflow

Submitter submits item to a Collection with "Step 2" in place. Submitter gets this message:

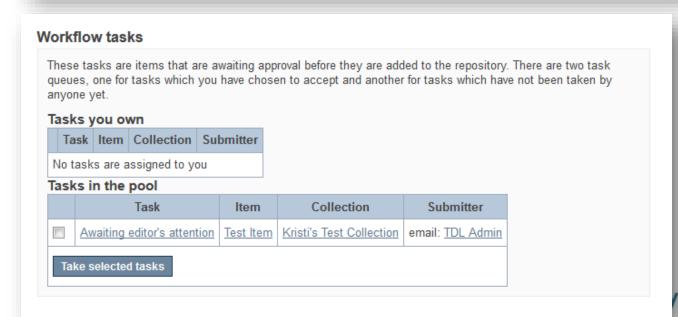
 An email is sent to every E-Person in the Workflow/Reviewer Group.

Reviewer Group also sees this on their Submissions page:

#### Submission complete

Your submission will now go through the review process for this collection. You will receive e-mail notification as soon as your submission has joined the collection, or if there is a problem with your submission. You may also check on the status of your submission by visiting your submissions page.

Go to the Submissions page





## Workflow, cont.

Review takes the task and reviews submitted item.

Reviewer can edit the item's metadata, approve or reject the item, or return the item to the pool for another Reviewer to pick up.

#### **Test Item**

Date: 2014

#### Files in this item



Name: TDL-preservation- ...

Size: 290.8Kb Format: PDF





Name: TDL-value-proposi ...

Size: 119.6Kb Format: PDF



#### Show full item record

#### Actions you may perform on this task:

If you have reviewed the item and it is suitable for inclusion in the collection, select "Approve".

If you have reviewed the item and found it is **not** suitable for inclusion in the collection, select "Reject". You will then be asked to enter a message indicating why the item is unsuitable, and whether the submitter should change something and resubmit.

Select this option to change the item's metadata.

Return the task to the pool so that another user may perform the task.

Approve item

Reject item

Edit metadata

Return task to pool

Cancel



### Authorization Policies

VERY specific permissions can be created for e-persons and groups by creating authorization policies at the Collection, Item, or Bitstream Level.







### Collection-Level Authorization Policies

COLLECTION LEVEL	
ADD/REMOVE	add or remove items (ADD = permission to submit items)
DEFAULT_ITEM_READ	inherited as READ by all submitted items
DEFAULT_BITSTREAM_READ	inherited as READ by Bitstreams of all submitted items. Note: only affects Bitstreams of an item at the time it is initially submitted. If a Bitstream is added later, it does not get the same default read policy.
COLLECTION_ADMIN	collection admins can edit items in a collection, withdraw items, map other items into this collection.





### Other Authorization Policies

Item-Level	
ADD/REMOVE	add or remove bundles
READ	can view item (item metadata is always viewable)
WRITE	Can modify item

Bundle-Level	
ADD/REMOVE	add or remove bitstreams to a bundle

Bitstream-Level	
READ	view bitstream
WRITE	modify bitstream





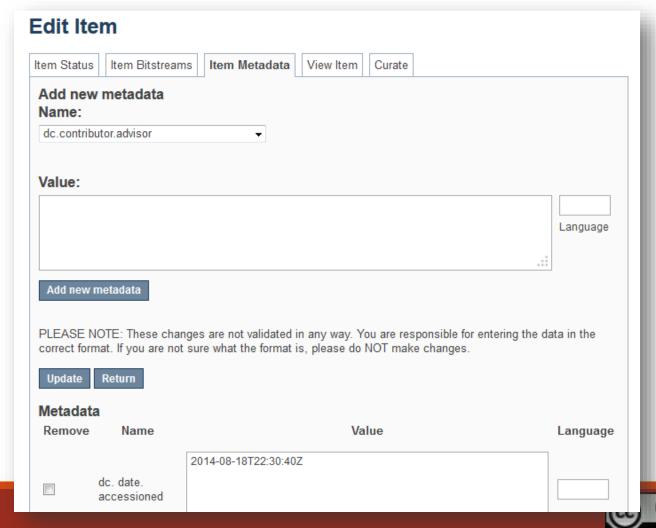
# Metadata





# Refresher: Editing Item Metadata

- 1. Navigate to the Item
- 2. Click "Edit this item" under "Context."
- 3. Go to "Item Metadata" tab.
- 4. Edit existing metadata, or add new fields.





## DSpace and Dublin Core



Dublin Core is at the heart of DSpace

2 mandatory elements when submitting thru UI:

- Title (dc.title) and
- Date of Publication (dc.date.issued)

7 automatic elements created by the software without any need for contributor input.

- 3 date elements
- 2 format elements
- Identifier
- Provenance.





## Creating Metadata Templates

#### When you should use metadata templates:

 Use metadata templates when you have one or more metadata elements whose value is the same across the whole collection

#### What you should know about metadata templates:

The value you enter in the template will automatically be applied to each work submitted to that collection.

If you create a metadata template for a collection that already has items in it, the template value will *only* be applied to future submissions.

Go to: Collection => Edit Collection => Edit Metadata => Item Template





### How To:

Create a Metadata Template

- Navigate to the desired Collection.
- Click Edit Collection
- 3. On the "Edit Metadata" tab, scroll down to the bottom of the page and click the **Create** button next to Item template
- 4. Click the **Work Metadata** tab
- 5. Select the metadata element in the pulldown menu
- 6. Enter the value for this metadata element in the provided field.
- Click the Add new metadata button.





# Adding Items to Metadata Registry



- The metadata registry maintains a list of all metadata fields available in the repository.
- These fields may be divided amongst multiple schemas. However, DSpace requires the qualified Dublin Core schema.
- You may extend the Dublin Core schema with additional fields or add new schemas to the registry.





# New metadata schema

Add the web address of the new schema

Add a prefix to be used for each term.

#### Metadata registry

The metadata registry maintains a list of all metadata fields available in the repository. These fields may be divided amongst multiple schemas. However, DSpace requires the qualified Dublin Core schema. You may extend the Dublin Core schema with additional fields or add new schemas to the registry.

ID	Namespace	Name
1	http://dublincore.org/documents/dcmi-terms/	<u>dc</u>
2	http://purl.org/dc/terms/	<u>dcterms</u>

#### Delete schema

#### Add a new schema

#### Namespace:

Namespace should be an established URI location for the new schema.

#### Name:

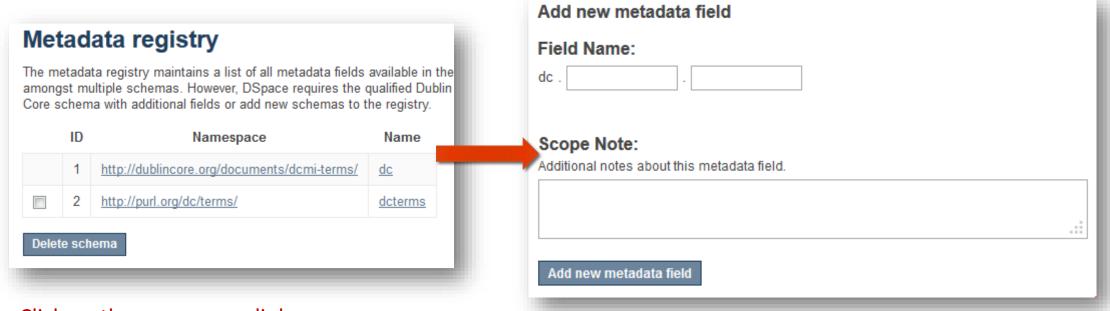
Shorthand notation for the schema. This will be used to prefix a field's name (e.g. dc.element.qualifier). The name must be less than 32 characters and cannot include spaces, periods or underscores.

Add new schema





# Add fields to an existing schema



Click on the namespace link.

Add new field.





# Good to Know

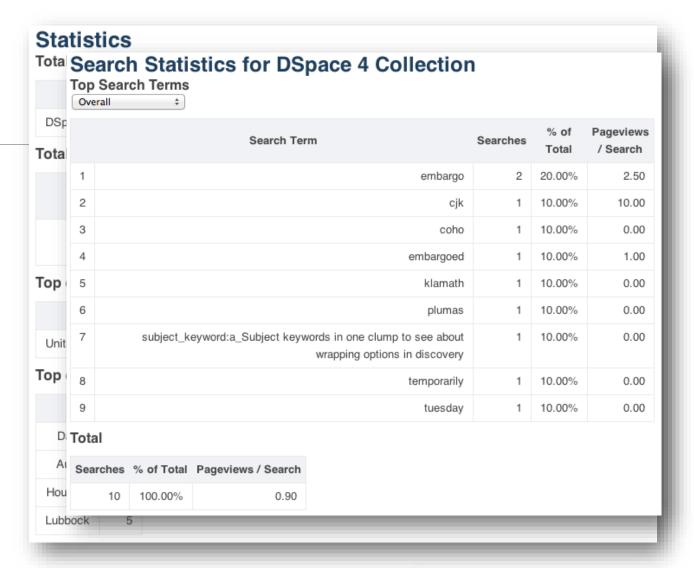




### Statistics

Usage statistics can be retrieved from individual item, collection and community pages. These Usage Statistics pages show:

- Total page visits (all time)
- Total Visits per Month
- File Downloads (all time)\*
- Top Country Views (all time)
- Top City Views (all time)







Withdrawing and Deleting Items **Edit Item** Item Status Item Bitstreams Item Metadata View Item Curate Welcome to the item management page. From here you can withdraw, reinstate, move or delete the item. You may also update or add new metadata / bitstreams on the other tabs. Item Internal ID: 1892 Handle: 123456789/1753 2014-08-26 09:37:46.15 Last Modified: Item Page: https://dspace41-test.tdl.org/DEV-ir/handle/123456789/1753 Withdraw an item = item is Authorizations... Edit item's authorization policies: hidden from view, leaves a Withdraw item from the repository: Withdraw... "tombstone," can be reinstated Move item to another collection: Move... Make item private: Make it private... Expunge an item = item is completely erased from the

Completely expunge item:

Return

archive, cannot be retrieved.

Permanently delete





### Mapping items

- One item may be displayed in multiple Collections simultaneously.
  - "Owned" by the original Collection to which it was submitted. "Mapped" to additional Collections. (Think of a desktop "shortcut" to an application or file on your computer.)
  - The "mapped" item inherits all the permissions, licenses, etc. of the original item.

#### WOMEN JAZZ SINGERS OF THE BIG BAND ERA (1930-1945): AN ANNOTATED BIBLIOGRAPHY AND RESEARCH GUIDE

McNair, Sarah E., Texas State University-San Marcos, School of Music

Document Type: Thesis

#### Abstract:

There is a growing body of reference works on women in music: Carolyn Rabson's Women in Music: An Annotated Bibliography (1985); Margaret Erickson's Women and Music: A Selective Annotated Bibliography on Women and Gender Issues in Music, 1987-1992 (1996); Karin Pendle's Women in Music: A Research and Information Guide (2005); and, more specifically, resources on women in jazz include Marie Rodgers's The Harlem Renaissance: An Annotated Reference Guide for Student Research (1998) and Karen Kindig's Women in Jazz: An Annotated Bibliography (2001). An extensive research guide has yet to be compiled on women jazz vocalists of the big band era. By identifying selected sources in the categories of dictionaries and encyclopedias, histories, biographies, discographies, iconographies, dissertations and theses, and other bibliographies, this thesis, an annotated bibliography, documents the historiography of female jazz singers, validating their positions as jazz musicians as well as highlighting references on this topic, thus laying the groundwork for others interested in similar research.

#### Recommended Citation:

McNair, Sarah E., "WOMEN JAZZ SINGERS OF THE BIG BAND ERA (1930-1945): AN ANNOTATED BIBLIOGRAPHY AND RESEARCH GUIDE" (2012). https://digital.library.txstate.edu/handle/10877/4394

#### Show full metadata

#### Download



Name: MCNAIR-THESIS.pdf

Size: 335.4Kb Format: PDF View/Open

#### This item appears in the following Collection(s)

- . Theses and Dissertations-Music
- Dissertations & Theses



### How To:

Use the Item Mapper

- Navigate to the Collection where you want the work to appear (i.e. the "mapped" collection).
- 2. Click Item Mapper under CONTEXT in the right-hand navigation bar
- 3. In the search box, enter the title of the item you want to map into the new collection
- 4. Click **Search works**
- 5. Click the check box next to the work you want to map
- 6. Click the **Map selected items** button at the top of the page





## Batch Metadata Editing



#### 3 Steps:

- Export CSV file
- 2. Edit values in CSV file
- 3. Re-import CSV file

#### Might be useful for:

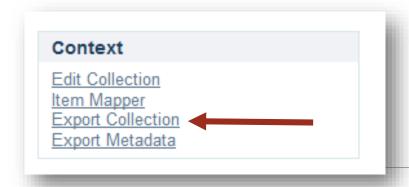
- Batch editing of metadata (e.g. perform an external spell check)
- Batch additions of metadata (e.g. add an abstract to a set of items, add controlled vocabulary such as LCSH)
- Batch find and replace of metadata values (e.g. correct misspelled surname across several records)
- Mass move items between collections
- Mass deletion, withdrawal, or re-instatement of items
- Enable the batch addition of new items (without bitstreams) via a CSV file
- Re-order the values in a list (e.g. authors)

#### Good documentation:

https://wiki.duraspace.org/display/DSDOC 4x/Batch+Metadata+Editing



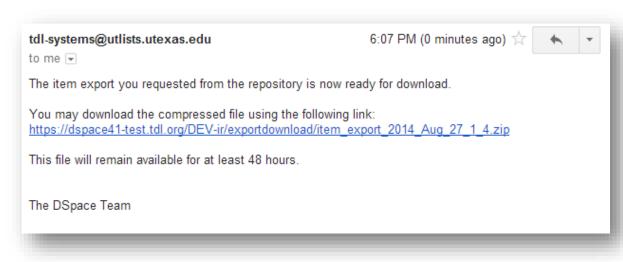




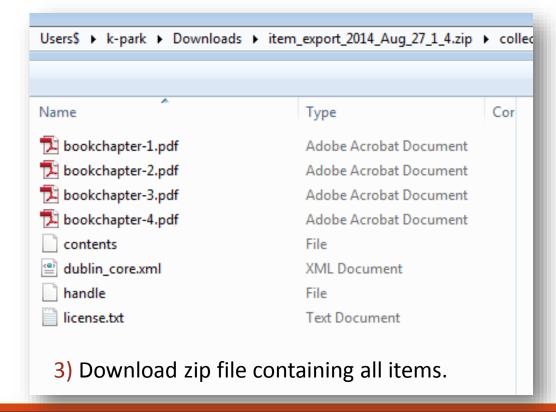
1) Export Collection (or Community)

# **Exporting Collections**

**Export Collection or Community via UI** 



2) Receive email, click on link to access exported files.



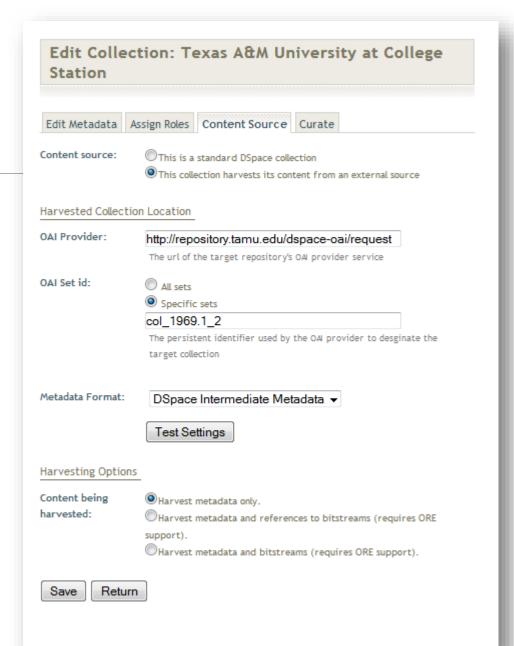


### Harvesting

- DSpace exposes metadata for collection by harvesters using the OAI-PMH protocol.
- DSpace can also harvest metadata and/or objects from other OAIcompliant repositories.
- Harvesting of another collection is configured under "Content Source."

#### **Documentation:**

https://wiki.duraspace.org/display/DSDOC4x/OAI





### **Curation Tasks**

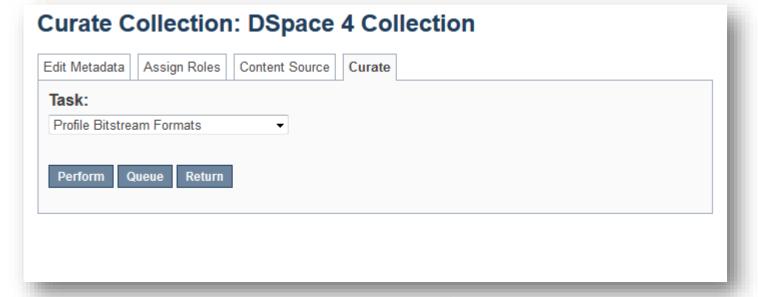
DSpace provides a framework, which it calls a "Curation System" for building programs that do routine repository management tasks.

Several out-of-the-box "curation tasks."

- Profile bitstream formats
- Check for required metadata

Where to find Curation Tasks:

Edit Collection (or Edit Community) => Curate







### Resources

TDL Helpdesk: <a href="mailto:support@tdl.og">support@tdl.og</a>

- http://www.Tdl.org/support/
- 1-855-495-4317

**DSpace Documentation:** 

https://wiki.duraspace.org/display/DSDOC4x/DSpace+4.x+Documentation

TDL DSpace Users Group:

https://utlists.utexas.edu/sympa/info/tdl dspace users group
(Click "subscribe")



Texas Digital Library

### Contact info

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