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Table of Contents

1  Document Description ............................................................................................................................................. 6
  1.1  Project Web Site .................................................................................................................................................. 6
  1.2  Project Group ...................................................................................................................................................... 6
  1.3  Suggestions ........................................................................................................................................................... 6
2  Home Page ............................................................................................................................................................... 7
3  Logging in as administrator ........................................................................................................................................ 8
  3.1  Home account – Initial view .................................................................................................................................. 9
4  Administration Menu .................................................................................................................................................. 11
  4.1  Affiliations Administration Menu ........................................................................................................................ 12
    4.1.1  Adding a New Affiliation .................................................................................................................................. 14
    4.1.2  Deleting an Affiliation ...................................................................................................................................... 15
  4.2  Approve User Affiliation ........................................................................................................................................ 15
  4.3  Checksum Information .......................................................................................................................................... 17
  4.4  Content Types ...................................................................................................................................................... 20
  4.5  Contributor Types ............................................................................................................................................... 24
  4.6  Copyright Statements .......................................................................................................................................... 24
  4.7  Departments ....................................................................................................................................................... 25
  4.8  Dublin Core Mappings ......................................................................................................................................... 27
    4.8.1  Contributor type DC Mapping .......................................................................................................................... 27
    4.8.2  Identifier type DC Mapping ................................................................................................................................ 28
4.9 Extent Types.................................................................30
4.10 Fields ..............................................................................................................31
4.11 File Storage.................................................................32
4.12 Handle Name Authorities.................................................................34
4.13 Identifier Types .................................................................35
4.14 IP Addresses / Statistics .................................................................36
  4.14.1 Ignore IP Address .................................................................37
  4.14.2 Adding an ignore IP address .................................................................38
  4.14.3 Download Counts by IP Address .................................................................39
  4.14.4 Ignore Download Counts by IP Address .................................................................39
4.15 Institutional Collections .................................................................40
  4.15.1 Adding a new collection .................................................................41
  4.15.2 Adding Images/Logos to a collection .................................................................43
  4.15.3 Collection Permissions and Groups .................................................................45
  4.15.4 Collection Subscribers .................................................................50
  4.15.5 Statistics (Under Construction) – Currently can be viewed by visiting the collection .........51
  4.15.6 Links ..............................................................................................................52
  4.15.7 Moving Collections .................................................................53
4.16 Language Types ..............................................................................................................55
4.17 MARC21 Mappings..............................................................................................................56
  4.17.1 MARC21 Import ..............................................................................................................56
  4.17.2 MARC21 Leader/Control Field Mappings .................................................................59
  4.17.3 Contributor Type Relator Codes ..............................................................................................................60
  4.17.4 MARC Data Field Mapping ..............................................................................................................62
  4.17.5 MARC21 Export ..............................................................................................................64
4.30 Users ............................................................................................................................................... 100
  4.30.1 Adding a new User .................................................................................................................... 102
  4.30.2 Editing a User ............................................................................................................................. 104
4.31 Managing Publications ..................................................................................................................... 110
  4.31.1 Edit Publication .......................................................................................................................... 112
  4.31.2 Withdraw/Reinstate Publication ................................................................................................. 112
  4.31.3 Move Publication ....................................................................................................................... 114
  4.31.4 Add new publication version ..................................................................................................... 115
  4.31.5 Managing Permissions (Non-Embargoed Publication) .............................................................. 116
  4.31.6 Managing Permissions (Embargoed Publication) .................................................................... 119
  4.31.7 OAI Metadata Records ............................................................................................................ 121
1 Document Description

This document describes the administration functionality of the system. This document assumes the system has already been installed and is ready for use. If you need to install the system please see the IR+ installation manual.

1.1 Project Web Site

If interested, you can visit the project web site on Google code at the following URL:

http://code.google.com/p/irplus/

The source code can be downloaded from this location, as well as finding out more about the project.

1.2 Project Group

The project also has a corresponding Google group at

http://groups.google.com/group/irplus?pli=1

1.3 Suggestions

Please feel free to submit comments and suggestions for how this documentation can be improved.
2 Home Page

An initial installation should look similar to the following image (not including the arrows and numbers). (Figure 1)

Here is a description of the numbered items:

1. **Site logo** – also a link that takes users to the home page (customizable).
2. **Menu Bar** – shown above the default login and create account options on the right hand side. The left hand side Home button takes users to the home page. Upon logging in more options are available to the user.
3. **Browse/Search Module** – allows the user to search the IR+ system.
4. **Institutional Collections Module** – current set of institutional collections.
5. **Statistics Module** – basic statistics for the entire system.
6. **General Links**

The following are **NOT** shown until they have content:

7. **Pictures Module** – a set of pictures/logos can be uploaded for display; randomly chooses from the set each time the page is visited.
8. **Researchers Module** – section that highlights the researcher pages; different ones are displayed each time the page is visited.
9. **News Module** – news that may be important to share with users; for example: maintenance dates, or scheduled down time.

3  **Logging in as administrator**

To log in select the login option in the **Menu Bar** (1)
Here is a description of the numbered items:

1. User Name – user name.
   a. This can be the Net ID for the user if LDAP is used.
   b. For local accounts it is either the user name selected by the user, or a user name assigned by the administrator when creating the account.
2. Password – local password or Net ID password.
3. Login / Reset buttons for resetting the form.
4. Forgot password link to allow a user to reset a password, and Create New Account to allow users to create a new account. Selecting Forgot Password will allow a user to enter their user name and an email will be sent to their default address. Selecting Create New Account will allow a user to create a new basic account in the system.

Log into the system using the administration username and password set up when the system was installed.

3.1 Home account – Initial view

Once you login you should see a home account like the following:
Here is a description of the numbered items (More about the workspace is in the user manual — this is here just to describe what will be seen on an initial login by the administrator):

1. Menu Bar – when logged in the menu bar should change. For an administrator there should be the following on the menu bar:
   a. Welcome [user name] – this drop down menu allows a user to manage their account information.
   b. Workspace – drop down menu that allows a user to navigate to their workspace and researcher page (researcher page option is only shown if user has researcher page rights).
   c. Administration – drop down menu for administration.
   d. Logout – allows a user to log out.

2. Workspace tabs (described below from left to right)
   a. My Files (currently selected) – allows a user to edit and manage their files. This can be thought of as a web based file system.
   b. My Publications – allows a user to manage their publications (publications they have added, or “published,” in the repository).
   c. Search My Workspace – allows a user to search their workspace.
   d. Shared File Inbox – area where shared files are initially put when a file is shared with the user.

3. Current file system size – the total space the user is using in their account. This does NOT include files shared with them; shared files are counted as part of the owning user’s file system account.

4. Path – current location of the user in their web file system.
5. Area where files and folders will be displayed.
6. Set of actions that can be performed in the **My Files tab** workspace.

### 4 Administration Menu

Below is the Administration menu bar. To open the menu bar left click on the drop down.

![Administration Menu](image)

The following is the list of the menu selections (alphabetical order):

1. **Affiliations** – manage affiliations that can be selected and the rights that can be assigned.
2. **Approve User Affiliation** – approve user affiliations.
3. **Checksum Information** – All checksum information available for files in the repository
4. **Content Types** – edit the content type drop down menu (book, article, etc.).
5. **Contributor Types** – edit contribution type drop down (Author, Advisor, etc.).
6. **Copyright Statements** – set of copyright statements that can be applied at a per-item level.
7. **Departments** – edit the department drop down list.
8. Dublin Core Mappings – assists in Dublin core output
   a. Contributor Type DC Mapping – allows mapping of contributor types
   b. Identifier Type DC Mapping – allows mapping of identifier types
9. Extent Types – edit extent types (page size, length of file, length of playing time, etc.).
10. Fields – edit the list of fields (subject disciplines) for researchers (Anthropology, Biology, etc.).
11. File Storage – location of the repository file databases.
12. Handle Name Authorities – area to manage handle information if used in your repository.
13. Identifier Types – edit the list of identifiers that can be attached to an item.
15. Institutional Collections – manage institutional collections: create, delete, or move; access Collection properties (photos, description, permissions, etc.).
16. IP Address / Statistics – Area to manage IP address download information and to exclude unwanted download counts.
17. Language Types – edit language type drop down menu.
18. MARC21 Mappings – assists in MARC21 import / export
   a. MARC21 leader control field mappings
   b. Contributor type relator mappings
   c. MARC21 data field mappings
19. Mime Types – manage mime types in the system.
21. Person Name Authority - manage person name information.
22. Places of Publication – Manage places of publication.
24. Repository – basic repository management, including adding pictures to the Pictures Module.
25. Repository Licenses – area to manage licenses for the repository that users must accept.
27. Roles – view roles in the system.
28. Series – edit the series listing.
29. Sponsors – edit the sponsors listing.
30. User Groups – manage user groups: create, edit, or delete.

4.1 Affiliations Administration Menu

Affiliations are a way to identify how users are associated with your organization and the permissions automatically assigned to users with specific affiliations. Users are allowed to select their affiliation when they register with the system. Affiliations for a particular user can be changed in the user account; however, this does not change the Authoring and Researcher permissions given. The Authoring and Researcher permissions can also be changed manually in the user account.

By selecting the Affiliations administration menu option you should see a screen like the following:
The following is a description of the numbered items:

1. Buttons for managing affiliations
   a. New Affiliation – create a new type of affiliation.
   b. Delete – remove the selected type of affiliation.
2. Table listing all affiliations. The following is a description of the columns:
   a. Name – name of the affiliation.
   b. Author Permission – gives a user with this affiliation author permissions when registering with the system.
   c. Researcher Permission – gives a user researcher permission when registering with the system. See “researcher page” in the User Manual for more about researcher page capabilities.
   d. Approval Required – the affiliation must be approved before it is given to the registering user. Enables administrators to prevent users from registering inappropriately and being given the wrong permissions.
4.1.1 Adding a New Affiliation

To add a new Affiliation, select the **New Affiliation** button.

The following is a description of the numbered items:

1. Name of the Affiliation

2. Description of the Affiliation

3. The types of permissions to give a user with this affiliation upon registration. If the “Needs Approval by admin” option is selected, the extra permissions will not be assigned until after approval is given.
4.1.2 Deleting an Affiliation

To delete an affiliation type, select the checkbox next to the affiliation to delete and then select the delete option (shown below). You will be asked to confirm the delete.

4.2 Approve User Affiliation

When a user registers in the system, if they select an affiliation that must be approved (see 4.1), they will be placed in an area where an administrator can view and approve/change the affiliation.

By selecting the Approve User Affiliation administration menu option you should see a screen like the following (for demonstration purposes, we show a user who needs to be approved):
The following is a description of the numbered items:

1. **Approve Button** – approves all checked registrants.
2. List of all affiliation requests
   a. **Id** – database ID of the registrant record
   b. **User Name** – user name of the user requesting affiliation – selecting the name will take the administrator to the users account information (see section: 4.27).
   c. **First Name** – first name entered by the user
   d. **Last Name** – last name entered by the user
   e. **Type of Affiliation** the user selected.
3. **Affiliation drop down box.** The administrator can change the user’s affiliation.

To approve an affiliation or affiliations check the users you wish to approve. Then select the approve button.

If you wish to change the affiliation before approval, use the affiliation drop down menu (3) and select the affiliation you wish to give the user. If approval is required, the user does not receive all capabilities until the administrator approves the affiliation. Once the affiliation has been approved any abilities not assigned while awaiting approval are given to the user. The user will also receive an email stating their affiliation has been approved.

The user will receive the following email to notify them their affiliation is pending approval

**Dear [user name],**

Your affiliation - "[affiliation type]" is being verified. You will be notified by email when the verification process is complete. Until then your account will have limited functionality.
All administrators will be notified a user is awaiting approval for an affiliation with a message like the following:

Dear admin,

Please verify the following affiliation: "[affiliation type]" for user: "[user name]"

You can login to the system using the link below: [link to installation]

Once the affiliation has been approved or rejected, the user will receive an email like the following:

Dear [user name],

Your affiliation with the system has been confirmed as: "[affiliation type]"

You can login into the system using the link below:
http://localhost:8080/ir_plus/home.action

4.3 Checksum Information

The checksum information shows the current checksum and the checksum checker data. This allows administrators to view any checksum failures within the repository. The checksum checker by default checks a file every four minutes and verifies that the checksums match. A checksum report is sent once a week indicating if there are currently any checksums that do not match.

By selecting Checksum Information you should see a screen like the following:
1. Filter by All or Failed. Filtering by failed allows you to see all checksums that have failed.

2. List of checksums for the filter. Clicking on the id link will give you a screen like the following:
1. Checksum information
2. Check Now – allows the administrator to check the checksum of the file immediately
3. List of reset of the checksum if they needed to be fixed (checksum changed but file integrity still ok)
4. List of major locations of where the checksum is found in the repository (Note: Some checksums are for thumbnails. Those will have a checksum record but will not be listed in any of these locations)

A failed Checksum screen will look like the following:
1. The reset checksum allows the administrator to reset the checksum once the file has been verified as ok. (Not damaged). This will set the file to be rechecked by the checksum checker and make sure the checksums match from this point forward. A reason for the reset is allowed to be entered. A record will be entered into the reset history every time the checksum is reset.

4.4 Content Types

Content types allow users to describe the type of content they are placing in the system.

By selecting the Content Types administration menu option you should see a screen like the following:
The following is a description of the numbered items:

1. Buttons to create a new content type and delete selected content types.
2. List of current content types:
   a. Checkbox – the one in the table header is a quick select: allows you to select all boxes at once.
   b. Id – database id.
   c. Name – name of the content type. Clicking the header will order ascending /descending.
   d. System Code – this is for developers to do processing on a particular content type.
   e. Description – description of the content type.
3. Checkbox for selecting individual content types to delete.

4.4.1.1 Adding a new content type

Select the new content type button.

The content type name must be unique. If the content type name already exists, the new content type will not be created and the user will be notified the content type already exists.

4.4.1.2 Editing a Content Type
To edit a content type, select the name of the content type you wish to edit. This will bring up a screen to edit the content type information.

4.4.1.3 Deleting a content type

Check the content types you wish to delete and select the delete button. You will see a confirmation like the following:
4.5 Contributor Types

Contributor types allow publication submitters to describe the type of contribution each person has made for a particular publication. Administration of contributor types is similar to administering content types: see section 4.3 for examples of adding and deleting.

By selecting the **Contributor Types** administration menu option you should see a screen like the following:

![Contributor Types administration menu](image)

<table>
<thead>
<tr>
<th>Id</th>
<th>Name</th>
<th>System Code</th>
<th>Authoring Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>Arranger</td>
<td>false</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Artist</td>
<td>ARTIST</td>
<td>true</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Author</td>
<td>AUTHOR</td>
<td>true</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Choreographer</td>
<td>false</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Compiler</td>
<td>false</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Composer</td>
<td>COMPOSER</td>
<td>true</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Donor</td>
<td>DONOR</td>
<td>false</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Editor</td>
<td>EDITOR</td>
<td>false</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Illustrator</td>
<td>ILLUSTRATOR</td>
<td>false</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Librettist</td>
<td>false</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Performer</td>
<td>false</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Photographer</td>
<td>PHOTOGRAPHER</td>
<td>true</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Thesis Advisor</td>
<td>THESIS_ADVISOR</td>
<td>false</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Translator</td>
<td>false</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note(1): The authoring type is used for determining which types of contributors should be indexed as authors by Google scholar.

4.6 Copyright Statements

Copyright statements are applied at the publication level. Some publications are in the public domain while others may have different copyrights. This menu item allows an administrator to create copyright statements that can then be applied by users during the publication process.

By selecting the **Copyright Statements** administration menu option you should see a screen like the following (in this example two copyright statements have already been added). Administration of
Copyright Statements is similar to administering content types: see section 4.3 for examples of adding and deleting.

The following is a description of the numbered items:

1. Button to create a new copyright statement.
2. List of current copyright statements:
   a. Id – database id.
   b. Name – name of the copyright statement.
   c. Text – text to be displayed for the copyright.
   d. Description – description of copyright statement.
3. Options for Editing/Deleting the copyright statements.

4.7 Departments

The Departments list allows users to indicate which department(s) they are affiliated with.

By selecting the Departments administration menu option you should see a screen like the one below. Administration of Departments is similar to administering content types: see section 4.3 for examples of adding, editing, and deleting.
The following describes the numbered items:

1. Buttons to manage department information:
   a. New Department – allows administrator to create a new department.
   b. Delete – allows administrator to delete selected departments.

2. Table of all departments:
   a. Id – database ID for the department.
   b. Name – name of the department.
   c. Description – description of the department.
4.8 Dublin Core Mappings

Dublin core mappings allow administrators to map certain types of metadata to the Dublin Core output for the OAI harvesting. IR+ supports both simple Dublin Core and Qualified Dublin Core output. More information about Dublin Core can be found at: http://dublincore.org/

4.8.1 Contributor type DC Mapping

This option allows Dublin core elements to be mapped to contributor types—see section 4.4 for contributor type information. This is generally used to map contributor types such as Thesis Advisor to a contributor Dublin Core element rather than a creator Dublin Core Element. Contributor type mappings are NOT required. If no mapping exists for a given contributor type in the system defaults the contributor type to creator.

To create a mapping, select the new mapping option shown below (1).

A box to create the mapping will be shown. Select the contributor type and the Dublin Core term as shown above. Once completed, select the submit button. This will create a mapping for the output of the record. See section: for viewing the Dublin core output of a record.

Once created you can manage the Dublin core mappings:
The following describes the table data:

1. **Id** – database ID for the mapping
2. **Identifier type** – name of the identifier
3. **Dublin Core term** – term the identifier type is mapped to
4. **Dublin Core Encoding Scheme** – Encoding Scheme the identifier type is mapped to
5. **Actions (Edit/Delete)** the identifier type

### 4.8.2 Identifier type DC Mapping

This option allows Dublin core elements to be mapped to identifier types – see section 4.12 for identifier type information. This is generally used to map data that may have special meaning and has been placed in the identifier fields. For example if MESH has been placed in the identifier field it can still be output correctly in Dublin core. Identifier type mappings are **NOT required**. If no mapping exists for a given identifier type in the system defaults the identifier type to identifier.

To create a mapping, select the new mapping option shown below (1).
A box to create the mapping will be shown. Select the identifier type, the Dublin Core term and optionally the Encoding Scheme as shown above. Once completed, select the submit button. This will create a mapping for the output of the record. See section: 4.28.7 for viewing the Dublin core output of a record.

Once created you can manage the Dublin core mappings:

The following describes the table data:

6. Id – database ID for the mapping
7. Identifier type – name of the identifier
8. Dublin Core term – term the identifier type is mapped to
9. Dublin Core Encoding Scheme – Encoding Scheme the identifier type is mapped to
10. Actions (Edit/Delete) the identifier type
### 4.9 Extent Types

Extent types allow your users to describe certain physical aspects of their publication. For example, the dimensions of a musical score, or length in time of a movie or sound file. Administration of extent types is similar to administering content types: see section 4.3 for examples of adding, editing, and deleting.

Selecting the Extent Types menu option on the Administration drop down should take you to a screen like the following:

The following describes the numbered items:

11. Buttons to manage Extent Type information:
   a. New Extent Type – allows administrator to create a new extent type.
   b. Delete – allows administrator to delete selected extent types.

12. Table of all extent types:
   a. Id – database ID for the extent type.
   b. Name – name of the extent type.
   c. Description – description of the extent type.
4.10 Fields

Fields allows users to indicate the subject area(s) in which they work. Administration of fields is similar to administering content types: See section 4.3 for examples of adding, editing, and deleting.

Selecting the Fields menu option on the Administration drop down should take you to a screen like the following (a field has been entered for demonstration purposes):

The following describes the numbered items:

1. Buttons to manage fields:
   a. New Field – create a new field entry.
   b. Delete selected fields.

2. List of fields:
   a. Id – database ID for the field.
   b. Name – name of the field.
   c. Description – description of the field.
4.11 File Storage

File Storage allows an administrator to create and view where files are being stored on the file system. The highest level of the file system is the File Server. The file server is a grouping of File Databases. You can think of File Databases as root locations where files and folders are created and stored by the application. Below is a screen shot of the top level File Server screen.

Selecting the File Storage menu option on the Administration drop down should take you to a screen like the following

4.11.1.1 File Server Management

The following describes the numbered items:

1. Button to add a new File Server.
2. List of file servers:
   a. Id – database ID for the file server.
   b. Name – name of the file server.
   c. Description – description of the file server.
   d. Actions to edit or delete the file server. If any file databases have been created, the file server should not be deleted.

4.11.1.2 File Databases
Selecting the name of a file server will bring you to the list of file databases in the file server.

The following describes the numbered items:

1. Button to add a new File Database.
2. List of File Databases for the file Server:
   a. Id – database ID for the file database.
   b. Name – name of the file database.
   c. Path – path to the file database on the file system.
   d. Description – description of the file database.
   e. Actions to edit the file database – the file database **should never** be deleted once it has been used.
4.11.1.3 Root Folders

Root folders of a file database are where files uploaded by the user are stored. Administrators should never need to create root folders in a file database. The system will create new folders as needed automatically.

The following describes the numbered items:

1. Button to add a new Root Folder.
2. List of Root Folders for the file Database:
   a. Id – database ID for the root folder.
   b. Name – name of the root folder.
   c. Path – path to the root folder on the file system.
   d. Description – description of the file database.

4.12 Handle Name Authorities

The handle system allows for persistent URLs to be assigned to publications in the system. If your system has been set up to use handles, the following allows you to set up and manage your handle name authorities. Administration of Handle Name Authorities is similar to administering content types: see section 4.3 for examples of adding, editing, and deleting.

Selecting the Handle Name Authorities menu option on the Administration drop down should take you to a screen like the following:
The following describes the numbered items:

1. Buttons to add a new handle name authority or delete selected handle name authorities.
2. List of handle name authorities set up for the system:
   a. Id – database id.
   b. Name – the handle name authority code.
   c. Base URL – the base URL of the handle; notice the trailing slash. This will almost always be [http://hdl.handle.net/](http://hdl.handle.net/).
   d. Description – description of the handle name authority.

### 4.13 Identifier Types

Identifier types allow users to describe the types of identifiers associated with their publications. Administration of Identifier types is similar to administering content types: see section 4.3 for examples of adding, editing, and deleting.

Selecting the Identifier Types menu option on the Administration drop down should take you to a screen like the following:
1. Buttons to add a new Identifier Type or delete selected identifier types.
2. List of identifier types set up for the system:
   a. Id – database id.
   b. Name – the name of the identifier type.
   c. Description – description of the identifier type.
   d. System Code – code that could be used at a later time by a developer.

4.14 IP Addresses / Statistics

This area allows administrators to view and manage how download counts are tracked. It allows administrators to retroactively remove counts and see the summation of all download counts by a given IP address. This allows an administrator to isolate download counts that may be an crawler and also view ignored download counts.
4.14.1 Ignore IP Address

This allows the administrator to ignore IP addresses that should not be included in statistics. The system stores IP addresses, so adding an IP address to the Ignore list will retroactively remove hits from the count. This could confuse users as the counts may go down.

Selecting the Ignore IP Addresses menu option on the Administration drop down should take you to a screen like the following:

The following is a description of the numbered items:

1. Button to manage IP addresses to ignore:
   a. New Ignore IpAddress – add an IP address range to ignore.
   b. Delete – remove selected IP addresses from the ‘ignore’ list.

2. Table of all IP addresses to ignore:
   a. Id – database id.
   b. Name – descriptive name.
   c. Store Counts – if set to true the counts will be stored in an ignore table – this allows the counts to be brought back if they are determined to be acceptable at a later time. If set to false the counts will not be stored and cannot be retrieved at a later time.
   d. From – start address range.
   e. To – ending address range.
   f. Description – description of the range. For example: “Google,” “invasive crawler,” etc.
3. Select this option to remove counts from the download statistics based on any new IP address ranges added.

4.14.2 Adding an ignore IP address

1. Select New Ignore IpAddress Button.
2. Enter a name and the “From” and “To” Range.
   a. If you wish to only have one ip address ignored, in the "To" range repeat the last part of
      the ip range as in the example above.
3. Determine if you would like to have the counts stored (default is true). If set to false these
   counts will not be stored in the ignore table. Counts stored in the ignore table can be later be
   re-added to the counts. This option is good when you are unsure if the counts may be needed
   later on.
4. Enter a optional description
5. Select the submit button
6. Select Run Update File Download Counts Job:
This will run in the background and update all of the counts and remove any counts that include the new ip address(es). This may take some time depending on the number of download counts recorded in the system.

4.14.3 Download Counts by IP Address

This allows an administrator to see download counts summed by IP Address. This allows an administrator to get an idea of if a given IP address is a crawler or is creating inaccurate download counts:

Table of downloads by IP address:

- IP Address – address creating the download counts.
- Download Counts – total number of downloads by the given IP address.

4.14.4 Ignore Download Counts by IP Address

This allows an administrator to see ignored download counts summed by IP Address. This allows an administrator to see what counts are being stored even though they are being ignored. An administrator may decide to remove these counts if they are found to not be useful.
Table of downloads by IP address:

- **IP Address** – address creating the download counts.
- **Download Counts** – total number of downloads by the given IP address.

### 4.15 Institutional Collections

Selecting the **Institutional Collections** menu option on the Administration drop down should take you to a screen like the following:

1. **Buttons for actions that can be performed:**
   - **New Collection** – creates a new collection.
b. Delete – allows selected collections to be deleted.
c. Move – allows collections to be moved.

2. Location you are in with respect to collections. The name of the system is the root location; in this case it is IR_Plus.
3. List of all collections (currently there are no collections listed).

4.15.1 Adding a new collection

To add a new collection

1. Select the New Collection button. You should see a pop-up box like the following:

2. Enter the collection name (here we have entered Anthropology).
3. Click the submit button – this will create an institutional collection with the specified name and bring you to the following screen:
1. Current location – since the system allows for an unlimited number of collections within collections, we show the current location. In this example, Anthropology is the current location.
   a. The View Collection link takes you to the collection in the repository so you can preview it.
2. Set of tabs for collection information:
   a. Collection Information (currently selected).
   b. Images – images for the collection. These will be shown in the collection images module.
   c. Subscribers – the list of subscribers for the collection.
   e. Links – links that can be added to point users to more information.
3. Name of the collection.
4. Description of the collection.
5. Option to save changes (applies to this tab only).
4.15.2 Adding Images/Logos to a collection

Select the Images tab on the collection page.

The following is a list of the numbered items:

1. **Upload Picture Button** – allows you to upload a picture.
2. **Primary Picture Section** – this is the primary picture / logo. This will always be the picture shown when a user visits the page. It will also be thumbnailed and placed next to the collection when displayed on the home page, or, for subcollections, on the parent collection home page.
3. **Pictures Section** – if there are other pictures, they will be placed in this section. Users will be able to cycle through the pictures on the collection page.
To upload a picture:

1. Select the Upload Picture Button. You should see a screen like the following:

2. Select the browse button and navigate to the image file on your local file system.
3. (Optional) If you want this to be the primary picture, check the Primary Picture option.
4. Click the submit button.
In the example below I have uploaded an image and have selected the primary picture option.

4.15.3 Collection Permissions and Groups

To add/edit permissions on a collection, select the Permissions & Groups Tab.
The following is a list of the numbered items:

1. Change the default view status of publications submitted to the collection. The default is Publicly Viewable, the other option is private. By changing it to private, only groups with view permissions will be able to see publications within collection. **Note: Users will still be able to navigate to the collection.**
2. Link to add groups to a collection.
3. List of groups who have permissions for the collection.
4.15.3.1 Changing Public/Private Status

By selecting the Make Private button it should bring up a dialog box like the following:

If the collection is public the options are:

1. Set the collection as private – make only the specified collection private. Do not change the current status of items within the collection.
2. Set the collection as well as the Publications and files in the collection to private.

If the collection is private (hidden) the options are:

1. Set the collection as public – make only the specified collection public.
2. Set the collection as well as the Publications and files in the collection as public.
4.15.3.2 Adding Groups

Select the Add Groups to Collection link. This should bring you to a screen like the following, which lists all the groups (see section 4.26 for more information about User Groups):

Note: The image shows a list of groups with a `Done` link and a `Add` option for a particular group.

The following is a list of the numbered items.

1. Done link – this allows user to return to the collection after adding group permissions.
2. List of groups that can be given permissions on the collection.

To add permissions for a particular group, select Add in the Action column. This should bring up a screen like the following:
The following are the list of actions that can be assigned to the groups:

ADMINISTRATION – allows the users in the group to administer the institutional collection [NOT YET COMPLETED].

REVIEWER – users in the group can review submitted publications.

DIRECT_SUBMIT – users in the group can submit directly to the collection. Submissions do not need to be reviewed prior to acceptance into the collection.

REVIEW_SUBMIT – users in the group can submit directly to the collection, but the submission will be reviewed prior to acceptance into the collection.

VIEW – users in the group can view the collection. This is only needed when the collection is set to private.

Once you have selected the permissions for the group, click the save button. This will save the selected permissions. Once you have added all of the groups, select the Done option.
You will be returned to the collection management area. Selecting the Permissions and Groups tab again will bring up the following screen, showing the group that has been added and their rights:

4.15.4 Collection Subscribers

To view collection subscribers, select the Subscribers tab. You will see a screen like the following:
4.15.5 Statistics (Under Construction) – Currently can be viewed by visiting the collection

See user’s manual
4.15.6 Links

This allows users to add links to be shown for the collection in the Links module. The following is a screen shot of the Department Links tab:

The following is a list of the numbered items:

1. Add Link – add a new link to be displayed in the Links module of the collection.
2. List of ordered links.

To add a link, select the Add Link button. You should see a screen like the following:
Enter the link information and click Submit. Below, I have created two links:

1. Order can be changed by selecting the down or up arrow on the respective links.

4.15.7 Moving Collections
As the collections grow and develop, you may need to move a collection. To move a collection, navigate to the collection you wish to move. In the example below, we will be moving the collection “Anthropology Faculty Articles” into the “Anthropology” collection. First we check the collection we wish to move (1):

2
1. Checked collection to move.
2. Select the Move button.

Clicking the Move button takes you to the following screen:

The following is a description of the numbered items:

1. Cancel Button – cancel the move.
2. List of collections and publications selected to move.
3. Current location – the current location in the file structure. Selecting the Move button will place the collection in the location listed here.
4. Move Button – move the collections to specified location.
5. Navigation – allows user to navigate to location.

Since we want to move the Anthropology Faculty Articles into Anthropology, we will select the Anthropology collection. This will bring up a screen like the following:

Our “Move To Location” is now /IR_Plus/Anthropology/. Now we can select the Move button.
This will take you to the following screen:

The collection is now moved underneath the Anthropology collection.

1. Shows that the path to this collection is /IR_Plus/Anthropology/.
2. The virtual path shows that Anthropology is the parent collection.

4.16 Language Types

Languages allow users to indicate the language(s) associated with their publications. Administration of languages is similar to administering content types: see section 4.3 for examples of adding, editing, and deleting.

Selecting the Languages menu option on the Administration drop down should take you to a screen like the following:
Buttons to add a New Language or delete selected languages.

List of languages set up for the system:
- **Id** – database id.
- **Name** – the name of the language.
- **ISO 639-2** code.
- **ISO 639-1** code.
- **System Code** – code that could be used at a later time by a developer.
- **Description** – description of the language.

### 4.17 MARC21 Mappings

MARC21 mappings allow administrators to map certain types of metadata to the MARC21 output for the OAI harvesting and MARC21 import features. More information about MARC can be found at:


### 4.17.1 MARC21 Import
MARC21 import can be done by anyone with the role: “ROLE_IMPORTER” (see sections 4.25 for roles and 4.29.2 for editing user). How to import MARC records can be found in the User Manual Importing MARC records section 8.8.5.

The default import sets the following fields and cannot be changed without code changes or a new import implementation:

1. MARC 100 field (Main Contributor)
   a. Subfield ‘a’ Name is added to person name authority
   b. Name is set as contributor to publication
   c. If subfield ‘d’ exists dates are added to birth and death dates
   d. If subfield 4 exists and is mapped the particular contributor type is added otherwise author is used

2. Marc 130 (Uniform Title)
   a. Subfields ‘a’ – ‘t’ are concatenated and added to publication as sub title

3. MARC 240 field (Uniform Title)
   a. Subfields ‘a’ – ‘s’ are concatenated and added to publication as sub title

4. MARC 245 field (Main Title)
   a. Subfield ‘a’ is set as main title
   b. If the second indicator is set the content is trimmed and moved into the articles of the main title. If the second indicator is 0, which it is many times, then no content is moved
   c. If subfield ‘b’ exists – the content is attached to the main title

5. MARC 246 field (Other/Additional title)
   a. First Indicator must be set to 3 or 1
   b. Subfields ‘a’ - ‘p’ are added to publication as sub title

6. MARC 260 field (publisher information)
   a. Subfield ‘a’ is added as the place of publication
   b. Subfield ‘b’ is added as publisher
   c. Subfield ‘c’ is added as date of publication

7. MARC 490 field (series)
   a. If the first indicator is NOT equal to 1 subfields ‘a’ – ‘x’ (except ‘v’ ) are concatenated and added as a series
   b. Subfield ‘v’ is added as the series report number

8. MARC 500, 502, 505 (description)
   a. Subfield ‘a’ is concatenated to description field
9. MARC 520 field (summary/abstract)
   a. Subfield ‘a’ is added to publication as abstract

10. MARC 650 field (subjects)
    a. Subfield ‘a’ - ‘z’ are concatenated and added as key word

11. MARC 653 field (subjects)
    a. Subfield ‘a’ added as key word

12. MARC 700 field (other contributors)
    a. Subfield ‘a’ Name is added to person name authority
    b. Name is set as contributor to publication
    c. If subfield ‘d’ exists dates are added to birth and death dates
    d. If subfield 4 exists and is mapped the particular contributor type is added, otherwise author is used
    e. If subfield ‘t’ exists it is added as a subtitle to the publication

13. MARC 730 field (Uniform title)
    a. Subfields ‘a’ – ‘x’ are concatenated and added to publication as subtitle

14. MARC 740 field (other title/additional title)
    a. Subfields ‘a’ – ‘p’ are concatenated and added to publication as subtitle

15. MARC 830 field
    a. Subfields ‘a’ – ‘x’ (except ‘v’ ) are added as a series
    b. Subfield ‘v’ is added as the series report number

16. If subfield 050 or 09X is mapped using the mapper (See Section 4.16.4.1) subfields ‘a’ and ‘b’ will be concatenated together and placed in the specified field.

17. If a 650 is mapped using the mapper with subfield ‘a’ – all fields a – x are mapped to the property in IR+.

18. If a 028 field is mapped using the mapper with subfield ‘a’ – both ‘a’ and ‘b’ are concatenated and placed into the IR+ field.

19. If a 250 field is mapped using the mapper with subfield ‘a’ – fields ‘a’ and ‘b’ are concatenated and placed into the IR+ field.
4.17.2 MARC21 Leader/Control Field Mappings

This option allows content types within IR+ to have default information set based on the given content when outputting MARC content—see section 4.3 for content type information. Leader/Control Field Mappings are NOT required but highly recommended. If no mapping exists for a given content type in the system it will default the content type to Book. If a book type is not mapped the fields are empty.

To create a mapping, select the new mapping option shown below (1).

1. Link to create a new mapping
2. List of existing mappings
   a. Id – database ID
   b. Content type mapped
   c. Actions that can be performed (Edit/Delete)

4.17.2.1 Selecting New Mapping or Editing an Existing Mapping

The following screen shows what can be set for the leader/control fields. NOTE that these settings will be followed when they can by the export system. Some fields may be filled in automatically or overwritten based on the implementation. The fields set/overwritten by the default implementation are listed below.

In the current default implementation the following is set by the export system by default and will be overwritten in the template:

   a. Language Type – this is the 008 field characters 35 – 37
   b. Type of date/Publication status - the 008 field character 6 is always set to s
   c. Year – this is the 008 field characters 07 – 10
   d. Place of publication – this is the 008 field characters 15 - 17
1. Content type to be mapped
2. Type of Record – leader – see MARC documentation
3. Thesis marker – if set to true the following will be set on export
   a. A 655 data field with indicator 7 will be created
      i. Subfield “a” will be set to “Electronic Dissertations”
      ii. Subfield “2” will be set to “lcgft”
   b. The description will be set in the 502 data field subfield “a” rather than the 500 data field subfield “a”
4. Leader fields – see MARC documentation for descriptions
5. 006 – 008 control fields see MARC documentation for descriptions

4.17.3 Contributor Type Relator Codes

This allows the MARC relator code to be mapped to an IR+ contributor type. This allows for the most correct match between IR+ contributor types and MARC relator codes.
1. Create a new mapping between an IR+ contributor type and MARC relator code
2. List of existing mappings
   a. Id – database ID
   b. IR+ Contributor type
   c. MARC relator code
   d. Actions (Delete/Edit)

4.17.3.1 Creating a New Mapping or Editing an Existing mapping

Selecting “New Mapping” or Edit allows an administrator to create a new mapping or edit an existing mapping.
4.17.4 MARC Data Field Mapping

This area allows an administrator to map certain fields to identifiers and or extent types in IR+.

1. Create a new mapping
2. Table of existing mappings
   a. Id – Database ID of the mapping
   b. MARC Data Field – current MARC data field mapping
   c. First indicator value
   d. Second indicator value
   e. Actions – edit/delete the given mapping

4.17.4.1 Creating a New Mapping or Editing an Existing mapping

By selecting “New Mapping” an administrator will be brought to a screen like the following:

The following is a description of the numbered items.

1. Breadcrumb navigation trail
2. Drop down listing of MARC data field to map
1. First indicator value for the MARC data field
2. Second indicator value for the MARC data field
3. Save and cancel buttons

Selecting Save when editing an existing mapping will bring up a screen like the following:

The following is a description of the numbered items.

1. Identifier Type mapping – allows the identifier type to be mapped to the given data field with the specified indicators.
2. Extent Type mapping – allows the extent types to be mapped to the given MARC data field with the specified indicators.

Creating or editing an **identifier type** mapping looks like the following:

1. The IR+ identifier type to map the MARC subfield to
2. The MARC subfield to map the IR+ identifier to

Creating or editing an **extent type** looks like the following
1. The IR+ extent type to map the MARC subfield to
2. The MARC subfield to map the IR+ extent type to

4.17.5 MARC21 Export

Marc export allows the IR+ data to be exported out to the MARC21 format. The following is how the default MARC exporter works:

The exporter will set the header type based on the MARC Leader/Control field mappings. See section 4.16.2.1 for more information. This maps an IR+ content type to header information. If there is no mapping for the content type of the publication, IR+ will try to default to the book content type that comes with IR+ by default. If this does not exist, only basic header information will be included.
- For the control fields 7 – 10 will contain the publication year if the publication contains a year in the externally published field (1). If the publication has a language and the ISO 639 2 language code is set it will be placed in fields 35 – 37 (7 and section 4.15). If the place of publication is set and the 2/3 letter code for the place of publication is set the 2/3 letter code is set in fields 15 – 17 (6 and section 4.20).

- The primary author (author listed as the first author of the publication) will be mapped to the 100 level data field. If the contributor type has been mapped to a MARC contributor type, the relator code will be set (2 and section 4.16.3).

- All other contributors will be mapped to the 700 level field. If the contributor type has been mapped to MARC contributor types, the relator codes will be set. If the MARC relator code equals “ths” a note in the 500 field will be added: “Advisor: [advisor name]” where advisor name is the name of the thesis advisor (3).

- The main title will be added to the 245 field ‘a’ with the articles appended. The first indicator will be set to the length of the articles in the title if any articles exist otherwise the value will be set to 0. If there is a primary author they will be added to the 245 subfield ‘c’. Subfield ‘h’ will always have the value “[electronic resource]” (4).

- If the publication has been published externally. The data will be mapped to the 260 field. Subfield ‘a’ will hold place of publication (6). Subfield ‘b’ will hold the publisher (5) and subfield ‘c’ will hold the publication date (1).

- If extents have been mapped (8 and section 4.16.4.1) then they are mapped into sections ‘a’ (number of pages), ‘b’ (Illustrations) and ‘c’ (Dimensions).

- If a description exists then it is mapped into the 500 subfield ‘a’ if it is NOT a thesis. If it set as a thesis (thesis type checked see section 4.16.2.1) then the description is mapped into 502 subfield ‘a’ (9).
- If the date the publication can be made available to the public is set (Embargo Date) then the following is added to 506 subfield ‘a’: “Access restricted until [Date]”. Where the date is the date entered by the user (Not Shown).

- If an abstract exists, it is added to 520 subfield ‘a’ with the first indicator set to 3 (10).

- If identifiers are mapped (11 and section 4.16.4.1), they are placed into the MARC fields as mapped.

- Keywords are added to the 653 subfield ‘a’ (12).

- If the item is marked as a thesis type (thesis type checked see section 4.16.2.1) data field 655 subfield ‘a’ is set to “Electronic Dissertations.” and Subfield ‘2’ is set to “lcgft”.

- If the Handle System is setup the handle is placed in the 856 subfield ‘u’ with the first indicator set to ‘4’ and second indicator set to ‘0’ (13).

- Each series is mapped to 490 subfield ‘a’ with the first indicator set to ‘1’ and an 830 subfield ‘a’ with the second indicator set to ‘0’. For both the 490 and 830 the series report number is mapped to the subfield ‘v’ (14).

- If a citation exists, it is mapped to data field 524 subfield ‘a’ (15).

- If a copyright statement exists, it is mapped to data field 540 subfield ‘a’ (Not Shown).

- If other titles exist, they are mapped to data field 246 subfield ‘a’ with the first indicator set to ‘3’ (16).

### 4.18 Mime Types

Mime types allow the system to determine the content type of files. These can be updated and changed over time. To go to mime types, select the Mime Types option in the Administration menu. It will take you to the list of Top Media Types; these are the top-level descriptions of the mime types.

You should see a screen like the following:
The following is a list of the numbered items:

1. Buttons to manage content (mime) types:
   a. New Top Media Type – allows the user to create a new media type.
   b. Delete – delete selected top media types.

2. Table of top media types:
   a. Id – database id.
   b. Name – name of the top media type.
   c. Description – description of the media type.
   d. Edit – edit the name / description of the top media type.
3. Link to view top media type sub types.
4. Link to edit the name and description of the top media type.

### 4.18.1 Sub Types

Sub types can be viewed by selecting the name of the top media type. Here is a screen shot of the Sub Types for the ‘application’ top media type:

1. Points to the pdf application sub type. By selecting this, we navigate to the file extensions for the file type shown below:
Here an administrator can manage the extensions for a given sub type, in this case pdf.

**NOTE:** Do not put in a period before the extension.
4.19 News

News allows administrators to post news information that may be important to users. News is shown on the home page.

Selecting the News menu option on the Administration drop down should take you to a screen like the following:

The following is a description of the numbered items:

1. Buttons for managing news items:
   a. New News Item - button for creating a new news item.
   b. Delete - allows selected news items to be deleted.

2. Table of existing news items:
   a. Checkbox - allows selected news items to be deleted.
   b. Id - database ID of the news item.
   c. Name - name of the news item.
   d. Date Available - date to make the news item available.
   e. Date Removed - date to remove the news item from home page.

4.19.1 Creating a new News Item

Selecting New News Item will bring up the following screen:
Entering the name will bring you to a screen like the following:

1. Welcome admin
2. Workspace
3. Administration
4. Logout

**Edit News**

- New News Item
- Delete

**News Information**

- Name:
- Submit
- Cancel

**News Information & Article**

- Name:
- Short Description:
- Date Available (MM/dd/YYYY):
- Date Removed (MM/dd/YYYY):
- Article

**Text Editing Tools**
The following is a description of the numbered items:

1. Tabs for managing a news item:
   b. News Pictures - allows images to be included in the news article.
2. Name of the news article.
3. Short description - used on the home page to describe the news.
4. Date Available - date the news item should start showing.
5. Date Removed - date the news item should stop showing.

4.19.2 Adding images

To add images to a news article, select the News Pictures tab and click the upload picture button. This should bring up a screen like the following:

The following is a description of the numbered items:

1. Browse to location of the picture file to be uploaded.
2. Primary picture option - if this is selected a thumbnail of the picture will be shown on the home page as the image for the news item.

Uploading an image will result in the following:
The following is a description of the numbered items:

1. Thumbnail of the uploaded image.
2. URL of the image - this can be used to place the image in the news.
3. Delete Picture option.

To place the image in the news article itself, copy the url, return to the News Information & Article tab, then select the add image button (indicated by the number one below):
This should bring up a screen like the following:
Edit News

Name: Welcome to IR+

Short Description:

Date Available (MM/dd/YYYY):

Date Removed (MM/dd/YYYY):

Article

Text Editing Tools

Image Options

Image URL: image URL

Size: 75 x 75

Description:

Link URL:

Paste in the url and it should look something like the following:
Once you are done, select the save option to save the news article.
4.20 Person Name Authority

We have implemented a system to help control names and provide a form of Name Authority Control in IR+. This allows all publications by the same author to point to one record that holds the person, their birth date, and names they have published under. To go to the name authority control administration area, go to Administration -> Person Name Authority menu item.

You should see the following screen:

The following is a description of the numbered items:

1. Tabs for managing person name authorities:
   a. Person Name Authority – browse list of all names in the system.
   b. Search – allows for full text search of person names.
2. Buttons for managing person name authorities:
   a. New Person – create a new person name authority in the system.
3. List of all person name authorities in the system using the Authoritative name:
   a. Database ID of the person name authority.
   b. Last name - selecting this will allow you to manage all names for this person.
   c. First name.
d. Middle name.
e. Family name.
f. Initials.
g. Birth Year.
h. Death Year.
i. Editing options *(Note: the edit option will only allow you to edit the authoritative name. Select the person’s last name if you wish to edit all of the user’s information.)*

**4.20.1 Creating a new Person Name Authority**

Person name authorities are created in several ways. One is in the administration section shown here. The other is during the submission process which is shown in the user manual.

Select the **New Person** button. You should see a screen like the following:

Enter the person name information and click the submit button. This will create a new authoritative name in the system. To view all names associated with the authoritative name or add other names that should be linked to the authoritative name, select the hyperlinked last name.
By selecting the hyperlinked last name in the PREVIOUS screen, you will see a screen like the following:

To add another person name to this authoritative name, click the button: New Person Name. You should see a screen like the following:

<table>
<thead>
<tr>
<th></th>
<th>Id</th>
<th>First Name</th>
<th>Last Name</th>
<th>Middle Name</th>
<th>Family Name</th>
<th>Initials</th>
<th>Numeration</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Nathan</td>
<td>Sarr</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Notice that there are a few differences. There is no birth date or death date. These are associated with the person, not each name. You can change the authoritative name by selecting the authoritative name check box when creating or editing a name.

Below shows a Person Name Authority with two different names (Note: an authoritative name cannot be deleted so there will be no checkbox to allow for deletion. Instead, it is marked as the authoritative name):
4.21 Place of Publication

The Place of Publication menu allows administrators to list the places of publication within the system and add new places of publication as needed. Below is an example of the place of publication admin interface:
1. Create a new place of publication
2. List of places of publication
   a. Id – database ID of the place of publication
   b. Name – name of the place of publication
   c. 2/3 letter code – used in MARC output
   d. Description – description of the place of publication
   e. Actions edit/delete

4.21.1 Creating a Place of Publication

Selecting the “New Place of Publication” link brings up the following screen.

The administrator can enter the Name, letter code and description. Selecting save will save the new place of publication. Selecting cancel will cancel the operation and leave the page without saving the new place of publication.

4.22 Publishers

The Publishers menu allows users to specify the name of the publisher (if any) of their work.

By selecting the Publishers administration menu option you should see a screen like the one below. Administration of Publishers is similar to administering content types: see section 4.3 for examples of adding, editing and deleting.
The following is a description of the numbered items:

1. Buttons to add/delete publishers.
2. Table of all publishers:
   a. Id – database id.
   b. Name – name of the publisher.
   c. Description - description of the publisher.

4.23 Repository

The repository menu item allows you to manage several very important aspects of the repository.
Here is a description of the numbered items:

1. Set of tabs for managing repository information:
   a. Repository Information - allows for re-indexing of repository information and major settings for the repository.
   b. Repository Pictures - allows for pictures to be uploaded for the images module.
c. Retired Licenses - a list of licenses that have been used in the repository but are no longer active. Once a repository license has been used, it cannot be used again.

2. Name given to the repository when the system was installed and set up.
3. Name of the institution where the repository is installed.
4. Default Handle Name Authority - allows the administrator to select the default handle naming authority. This is not required. See Section 4.11 for more about handles.
5. Current File Database. Allows the administrator to select the file database where all files will be stored. This can be useful when a file database is running out of room. See Section 4.10 for more information on the file database.
6. Current License for the repository. This allows the administrator to select the license that a user has to accept when creating an account or submitting. The user is only required to accept the license once. If the License is CHANGED users will be re-prompted to accept the license when visiting their workspace if they have not already accepted the license. See Section 4.22 for more about Repository Licenses.
7. Description for the repository.
8. Suspend Subscription Emails. If this is checked no subscription emails will be sent to users.
9. Location where the name authority index will be created. This allows for the full text search of authoritative names.
10. Location where the user index will be created. This allows for the full text search of users.
11. Location where the researcher index will be created. This allows for full text searching of researchers.
12. Location where the institutional item index folder will be created. This allows for the full text searching of institutional publications.
13. User workspace index folder location. Each authoring user will get their own index folder for searching their personal workspace.
14. Re-Index Institutional Items – will re-index the all the institutional items in the repository. This will fire off a job that will re-index all institutional items. In general this option does not need to be used.
15. Allows the administrator to have the user information be re-indexed. In general this option does not need to be used.
16. Allows researchers to be re-indexed. In general this option does not need to be used.
17. Allows person name authority information to be re-indexed. In general this option does not need to be used.
18. Reset all handles. Updates all handles with the correct repository URL to a publication. In general this option does not need to be used.

4.23.1 Adding pictures to the Picture Module

Select the Add Repository Picture Link in the Repository Administration section. It should bring you to a page like the following:
Select the browse button. Navigate to a picture on your file system and then select the upload button to upload the picture. Once the picture is uploaded, the system will return you to the Repository Administration page. The file will be stored and thumbnailed. The picture will now show on your homepage in the **Pictures module**.

Once the file has been uploaded, clicking back on the Repository Picture tab should produce a screen that looks like the following:
4.23.2 Retired Licenses

Once a repository license has been used, it cannot be changed or re-used. If you create a new version of the license, the previous license will be retired. You can view all retired repository licenses by selecting the Retired Licenses tab. Any user who has submitted under a particular license is stored permanently.

4.24 Repository Licenses
The repository license allows you to set up a license that all users must agree to when creating an account. This license is versioned and you can add new versions of the license. Users will be asked to re-accept the new license when they submit into the repository.

Selecting the **Repository Licenses** menu option will bring you to a page like the following (the example shown has a previously created entry):

Here is a description of the numbered items:

1. **Add License Link** - allows an administrator to create a new license.
2. List of licenses already created.
3. Name of the license - selecting it will take you to a listing of all versions for that license.
4. Option to add a new version to the existing license.

To create a new License click the Add License Link. This should bring up a screen like the following:
4.24.1 Adding a new Repository License

IR+ allows a reviewer to review pending publications and approve or reject the publication. To access items awaiting review go to Administration -> Review Pending Publications.

This will bring up the following screen:

4.25 Review Pending Publications

IR+ allows a reviewer to review pending publications and approve or reject the publication. To access items awaiting review go to Administration -> Review Pending Publications.

This will bring up the following screen:
The following is a list of the numbered items:

1. List of publications the user can review:
   a. Id – database ID of the record.
   b. Publication Name – name of the publication.
   c. Collection – collection the publication was submitted to.

4.25.1 Accepting/Rejecting a publication

By selecting the name of the publication, the administrator can then accept or reject the publication. The following is the screen a reviewer will see by selecting the publication name:
The following is a list of the numbered items:

1. List of files.
2. Option to edit the metadata.
3. Back to Pending Items – takes the user back to the pending items list.
4. Accept Button – accept the publication.
5. Reject Button – reject the publication.

Upon accepting the publication the user will be notified by email. If the publication is rejected, the reviewer will be shown the following screen:
The reviewer will be asked to enter a reason for rejection. This reason for rejection will be sent to the submitter.

4.26 Roles

To review the descriptions of Roles in the IR+ system, select the Roles option in the Administration drop down. **Note: Do NOT change role information.**

The following is a list of default roles for the system:
The following is a description of the Roles:

ROLE_ADMIN – Administrator of the system.

ROLE_AUTHOR – user will be allocated workspace and has the ability to author and share documents with other users in the system. See user manual for authoring.

ROLE_COLLABORATOR – a user who has the ability to work on a file with another author but does not have the ability to start a new work on their own.

ROLE_COLLECTION_ADMIN (Under Construction) – a user who can manage one or more collections but cannot administer the entire repository system like the administrator.

ROLE_IMPORTER – allows a user to import MARC data into their personal workspace

ROLE_RESEARCHER – a user who can create a researcher page within the system. See the User Manual for more about researcher page capabilities.

ROLE_USER – a basic user who can view information and subscribe to collections.

4.27 Series

The Series menu allows users to indicate if a publication is part of a series.

By selecting the Series administration menu option you should see a screen like the one below. Administration of Series is similar to administering content types: see section 4.3 for examples of adding, editing and deleting.
4.28 Sponsors

The Sponsors menu allows users to indicate funding agencies that have provided grants to support the work described in a particular publication.

By selecting the Sponsors administration menu option you should see a screen like the one below. Administration of Sponsors is similar to administering content types: see section 4.3 for examples of adding, editing and deleting.

4.29 User Groups
Selecting the User Groups menu option on the Administration drop down should take you to a screen like the following:

1. Buttons to manage user groups:
   a. New User Group – create a new user group.
   b. Delete – deletes checked user groups.
2. List of user Groups:
   a. Checkbox to delete one or more user groups.
   b. Database ID of the user group.
   c. Name of the user group.
   d. Description of the user group.

4.29.1 Creating a new User Group

To create a new user group, click the New User Group Button. This will bring up a screen like the following:
Enter the Name and (optionally) a description and click the submit button. This will create a user group with the specified name.

Clicking the name of the user group will take you to the following screen:
The following is a description of the numbered items:

1. Tabs for managing group information:
   a. User Group Tab (currently selected) – area to edit name and description of a group.
   b. Group Members Tab – area to add and remove members.
   c. Group Administrators Tab – area to add and remove administrators of the group (Under Construction).

2. Name of the user group

3. Description of the user group
4.29.2 Add a user to a group

To add a user to a group, find the name of the group in the list of groups, and click it. Then select the Group Members tab (blue tab shown below):

Enter a name or part of a name in the search box (1). If one or more matches are found, they will be listed on the right ("Viewing..."). Click the Add User link to add the desired user to the group.

The following is a description of the numbered items:

1. Search box for a full text search against all users. (Hit Enter after entering the name.)
2. Current members of the group.
3. Results of the search – selecting the Add User link will add this user to the group.

4.29.3 Remove a user from a group
Click the Remove User link. If the group is very large, you can search for the user and remove them on the search side as well (shown on right hand side).

### 4.30 Users

The Users item in the Administration menu allows you to search and find any user registered in the system, and manage their account in various ways.

By selecting Users in the Administration menu, you should see the following screen:
1. Tabs for dealing with user information:
   a. Users – (currently selected tab) offers a full browse of all the users.
   b. Search – full text search for users.
2. Buttons for common actions:
   a. New User – button to create a new user.
   b. Delete – deletes the checked user or users.
3. Page Bar – will show all pages for users if there are a large number of users.
4. List of user information – the following is a list of the columns:
   a. Id – database ID of the user.
   b. User Name – user name given to the user; must be unique.
   c. Last Name – last name of the user.
   d. First Name – first name of the user.
   e. Email – user’s email.
   f. Login Date – last time the user logged into the system
   g. Change Password – allows admin to change the user’s password.
   h. Login as this user – allows administrator to login as the specified user. This takes the administrator into the specified user account.
5. Column that can be sorted – an underlined column means it can be sorted. The arrow next to the column when pointed down means descending order.
4.30.1 Adding a new User

Every user must have a local account. Users can also use LDAP to login but that is a secondary way to login to the system. There are several reasons for this:

1. Not all users of the system will be LDAP users or have an LDAP account.
2. If there is a problem with the user’s LDAP account, they can still access their files using their local account, and if they forget their password, a new one can be created for their local account using their email.

From the main user Administration screen select the new User Button.
This will bring up the screen to add a new user. The following is the description of the form shown above:

1. First Name – first name of the user.
2. Last Name – last name of the user.
3. User Name – user name for the user.
4. Password – local password for the user.
5. Password Check – check to make sure password is correct.
6. NetID – LDAP NetID for the user (so a user can use LDAP to login).
7. Default Email – default email for the user.
8. Phone Number – phone number for the user.
9. Affiliation – affiliation status of the user. The following are the default options:
   a. Not Affiliated
   b. Staff
   c. Undergraduate Student
   d. Graduate Student
   e. Faculty
   f. Alumni
10. Department – these can be customized by each institution.
11. Account Locked – option to set a user’s account as locked.
12. Account Expired – option to set a user’s account as expired (reserved for future use and setting expirations of accounts; should NOT currently be used).
13. Credentials Expired – option to set user’s credentials as expired (should NOT currently be used).
14. Roles:
   a. Admin – gives a user administration role / privileges – can manage all aspects of the system.
   b. User – basic user rights to login and subscribe to collections.
   c. Author – user has rights to upload documents and share with other users. This includes the ability to invite people to work on documents that may not currently be part of the system. See user manual for further explanation.
   d. Researcher – gives a user researcher abilities.
   e. Collections Administrator – allows a user to administer specific collections without giving them full Administrator (Admin) rights. This can be used for distributed collection administration.
   f. Importer (not shown) – allows a user to use the MARC import features
15. Check Box to email the user their password and account creation information.
Filling in the information and submitting will store the user data and bring you to the User Information screen.

### 4.30.2 Editing a User

To edit a user, search for the name as described above. You should get a screen like the following:

1. Select the hyper linked user name (1). This should bring up a screen like the following:
User Information

User Information | Emails | Authoritative name | Accepted Repository Licenses

Re Index User Workspace

File system size: 0 bytes

Last Login:

First Name: Nathan
Last Name: Sar
User Name: * ndsarr
Phone Number: 
Affiliation: Faculty

Account Locked: 
Account Expired: 
Credentials Expired: 

(snap continued on next page)
The following is a description of the numbered items:

1. Back to Users Button – takes administrator back to the list of users.
2. Tabs to manage user information:
   a. User Information (currently selected) – basic user information.
   b. Emails – set of emails that the user may have associated with their account.
   c. Authoritative Name – manage a user’s authoritative name, which links them to published material in the repository.
   d. Accepted Repository Licenses - licenses the user has agreed to.
3. Re-Index Users Workspace - ability to re-index an authoring user workspace. This only needs to be done if the user is having trouble searching their workspace.
4. Information for the user
   a. Space usage
   b. Last login Date
   c. Name, User affiliation and Department information.
   d. Account status
5. Roles the user currently has
   a. Admin – User is an administrator
   b. Collection Administrator (Not yet implemented) – User can administer one or more collections
   c. Researcher – user has researcher tools
   d. Importer – user can use the MARC import features
   e. Author – User has authoring tools
   f. User – Basic user no workspace or researcher tools
   g. Collaborator only – user can only work on documents that have been shared with them. They cannot start new documents or publish.
6. General information:
a. Date the account was created.
b. Where the personal index workspace is located.
c. If the user is self registered.

7. Save - save updated information.
8. Deletes a user’s researcher page if one exists.

4.30.2.1 Managing Emails

This system allows users to store multiple emails.

The following is a description of the numbered items:

1. New Email - allows a new email for the user to be created.
2. List of emails for the user:
   a. Id - database id.
   b. Email - the email address.
   c. Status – ‘verified’ indicates the email has been verified either by an administrator or through email token confirmation. Pending verification means the user has not yet verified the address through email token confirmation.
   d. Actions - actions that can be performed on the email address.
3. Actions that can be performed on the email:
   a. Delete - delete the email.
   b. Set As Verified - allows an administrator to verify an email if a problem occurs.

The default email is the email that all messages generated by the system will be sent to. This can also be changed by the user.

4.30.2.2 Authoritative Name Tab

The best way to explain this section is by describing the problem.

We often deposit (publish) material in the repository for faculty or administrators. Say you created a publication for a faculty member who is not currently registered in the system. One of the steps in the publication process is assigning the Contributor names (and roles), either by searching for existing author names, or creating a new name. In either case, the name assigned is the authoritative name. Later the faculty member decides to register in the system and creates an account. How do you now link the previously published material to that user account? The IR+ system accomplishes this by allowing the administrator to link the user account to their authoritative name. The following is how to do this.

To link an authoritative name to a user account, first search for the authoritative name. In the example below I have searched for Bach. This will return all Authoritative names that contain Bach.
Assume we have a faculty member name Carl Philipp Emanuel Bach.

Description of numbered items:

1. Full text search to find Authoritative name.
2. The current authoritative name linked to the account if one exists. In our example, an authoritative name does already exist for this user. Selecting the Remove option will remove the authoritative name from the user account.
3. List of users found when searching for Bach. The “Add” link allows an administrator to link an authoritative name to the current user’s account. If the user already has an authoritative name, the current name is replaced with the selected name.

4.3.2.3 *Accepted Repository Licenses*

Over time licenses for the repository may change. When a default license is changed, users are required to accept the new license. We track all licenses accepted by a user.

The following shows the license the user has accepted and the date it was accepted:
4.31 Managing Publications

Administrators have the ability to manage publications. The following is the screen an administrator would see when visiting a publication:

Accepted Repository Submission Licenses

<table>
<thead>
<tr>
<th>License Id</th>
<th>Name</th>
<th>Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Default License</td>
<td>NON-EXCLUSIVE DISTRIBUTION LICENSE: In order for the Institutional Repository to reproduce, translate and distribute your submission(s), your agreement to the following terms is necessary. Please read the terms of this license carefully and click on the 'I agree' or 'I disagree' buttons at the bottom of the screen accordingly. This agreement will apply to all of your submissions to the Institutional Repository. By agreeing and submitting this license, you (the author(s) or copyright owner(s)) grant to the University of Rochester the perpetual, non-exclusive, royalty-free right to reproduce, translate (as defined below), and/or distribute your submissions (including the abstracts) in print and electronic format and in any medium. You agree that the University of Rochester may, without changing the content, translate the submission to any medium or format for the purposes of preservation. You also agree that the University of Rochester may keep more than one copy of this submission for purposes of security, back-up and preservation. You represent that any submissions are your original work and that you have the right to grant the rights contained in this license. You also represent that your submissions do not, to the best of your knowledge, infringe upon anyone's copyright or other proprietary rights. IF ANY SUBMISSION CONTAINS MATERIAL FOR WHICH YOU DO NOT HOLD THE COPYRIGHT, YOU REPRESENT THAT, BEFORE SUBMISSION YOU WILL HAVE OBTAINED THE UNRESTRICTED PERMISSION OF THE COPYRIGHT OWNER TO GRANT THE UNIVERSITY OF ROCHESTER THE RIGHTS GRANTED BY THIS LICENSE, AND THAT SUCH THIRD-PARTY OWNER MATERIAL IS CLEARLY IDENTIFIED AND ACKNOWLEDGED WITHIN THE TEXT OR CONTENT OF THE SUBMISSION. IF ANY SUBMISSION IS BASED UPON WORK THAT HAS BEEN SPONSORED OR SUPPORTED BY AN AGENCY OR ORGANIZATION OTHER THAN THE UNIVERSITY OF ROCHESTER, YOU REPRESENT THAT, BEFORE SUBMISSION YOU WILL HAVE FULFILLED ANY RIGHT OR REVIEW OR OTHER OBLIGATIONS REQUIRED BY SUCH CONTRACT OR AGREEMENT. The University of Rochester will clearly identify your name(s) as the author(s) or owner(s) of your submission(s), and will not make any alterations, other than as allowed by this license, to your submission. The use of this system is subject to the University of Rochester IT Policy which can be found at the following URL: <a href="http://www.rochester.edu/it/policy/">http://www.rochester.edu/it/policy/</a></td>
</tr>
</tbody>
</table>
The following is a list of the numbered items:

1. Current location in the repository.
2. Title of the item.
3. View Status of the Item – (Publicly Viewable or Restricted)
4. Handle of item if handle system is enabled
5. Editing options available to administrator
   a. Edit Publication – allows administrator to edit the publication without creating a new version.
   b. Withdraw Publication – allows the administrator to withdraw the publication.
   c. Move Publication – allows the administrator to move the publication (to another collection).
d. Manage Permissions – allows the administrator to change file and item level permissions.
e. Add New Version – allows administrator to add a new version to the publication (publications are versioned).
f. Delete – delete the publication.
g. Add to Researcher Page – allows user to add publication to their researcher page.

6. List of files that make up the item (if more than one file). This includes the status of each file (Publicly Viewable/Restricted/Publicly Viewable after Embargo/Restricted after Embargo).
7. Number of downloads for the file.
8. Metadata.
9. List of metadata formats available to OAI harvesting with link to the record data.
10. MARC file output for record.
11. Versions of the publication.

4.31.1 Edit Publication
The Edit Publication button allows the administrator to edit the publication without creating a new version. See publication process in user manual.

4.31.2 Withdraw/Reinstate Publication
By selecting the withdraw publication button, the administrator can withdraw a publication. The following screen will be displayed:
The administrator must include a reason for the withdrawal and can opt to let the metadata be displayed. The administrator can also withdraw all versions.

Once the withdrawal is complete the screen will display the following:
The administrator can see all the data but a normal user will only be able to see the withdrawn information. The withdrawal statements will always be in red. Also notice the withdraw button has changed to a Reinstatement Publication button to allow the publication to be reinstated at a later date.

4.31.3 Move Publication
If an administrator determines a publication is in the wrong collection, the publication can be moved. The following demonstrates how to move a publication after selecting the Move Publication Button.
The following is a description of the numbered items:

1. Cancel Button – cancel the move.
2. Current item being moved.
3. Current location and navigation – selecting one of the links will take you to the parent collection. Currently we are in the deepest level collection.
4. Move Button – when you have navigated to the correct location, select this button.
5. List of sub collections within the current location.

If we click the Anthropology Faculty Articles link (#5) the following screen is displayed:

By selecting the move button, the thesis will be moved into the Anthropology Faculty Articles collection.

4.31.4 Add new publication version

By selecting the Add New Version button (see section 4.29, item 10) on a publication, we can create a new version of the publication. This brings up a display of the user’s current personal publications (the “My Publications” tab) and the options to add any personal publication as the new version.
The permissions can be managed for a publication by selecting the Manage Permissions button. It will display a screen like the following:

<table>
<thead>
<tr>
<th>Id</th>
<th>Name</th>
<th>Version</th>
<th>Add</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Blog-It</td>
<td>1</td>
<td>Add as version</td>
</tr>
<tr>
<td>2</td>
<td>IR+ User Documentation</td>
<td>1</td>
<td>Add as version</td>
</tr>
</tbody>
</table>
The following is a description of the numbered items:

1. Back to Publication – takes user back to the publication.
2. Tabs for managing permissions:
   a. Publication Permissions – permissions related to the publication.
   b. Publication File Permissions – permissions related directly to the files in the publication.
3. Publication viewable – if this is set to Yes everyone can see the publication; permissions will not be checked.
4. Give permissions for this item only to specific Groups.
5. List of groups with permissions.
4.31.5.1 Adding permissions to a publication

On the Publication Permissions tab, select the Add Groups To Publication link. This displays all the groups that have been created in the system:

Select the Add link for the appropriate group and you will see a screen like the following:

Select the Add link for the appropriate group and you will see a screen like the following:
The following is a description of the permissions for the publications:

1. **ITEM_FILE_EDIT** – user group can add, edit and remove files from the item.
2. **ITEM_METADATA_EDIT** – the user group can edit the item metadata.
3. **ITEM_METADATA_READ** – the user group can view the item metadata.

### 4.31.5.2 Add permissions to a publication file

This tab displays the list of files associated with a publication; in this case there is only one file. This tab is only to manage who can and cannot view the file(s). So if a particular file cannot be viewed by everyone, specific groups can be given view permissions. If the file is viewable by all users this will allow everyone to view the file. To make the file(s) private:

1. First change this option to ‘No’
2. Add the group or groups that can view the file by clicking ‘Add new user group.’

---

**File Read permission groups**

<table>
<thead>
<tr>
<th>Action</th>
<th>Group Name</th>
<th>Item file read</th>
</tr>
</thead>
</table>

---

### 4.31.6 Managing Permissions (Embargoed Publication)
Embargoes can be set during the submission of a publication - see the User’s manual for how to set an embargo during submission. Managing permissions for embargoed items is similar to managing permissions of non embargoed publications. This section will only highlight the differences between the two.

### 4.31.6.1 Publication Permissions on an embargoed publication

If you are managing the permissions on an embargoed publication, a message will be displayed at the top of the manage permissions screen (1) showing the date the publication is embargoed until.

The publication will be set to be viewable by all users BUT ONLY AFTER the Embargo expires (2).

If the permissions are set to no (3), the publication will NOT be viewable to the public EVEN AFTER the embargo expires.
4.31.6.2 File Permissions on an embargoed publication

The above shows two files as part of the publication.

- The first file (1) will be viewable by all users after the embargo expires.

- The second file (2) will NOT be viewable by anyone even after the embargo expires.

4.31.7 OAI Metadata Records

Selecting the available format will show the metadata that would be harvested for the particular format. Below is an example of the OAI dc record when the link is selected:
Below is an example of the dcterms record:

```
<GetRecord>
  <record>
    <header>
      <identifier>oaiuoresearch.rochester.edu:2</identifier>
      <datestamp>2010-09-24T18:54:31Z</datestamp>
      <setSpec>3</setSpec>
    </header>
    <metadata>
      <oai_dc:xsi:schemaLocation>
        http://www.openarchives.org/OAI/2.0/oai_dc.xsd http://www.openarchives.org/OAI/2.0/oai_dc.xsd</oai_dc:xsi:schemaLocation>
      <dcterms:R+ User Manual@dcterms:title>
        <dcterms:Book@dcterms:type>
        <dcterms:Fri, 24 Sep 2010 14:54:31@dcterms:modified>
        <dcterms:Fri, 24 Sep 2010 14:54:31@dcterms:modified>
        <oai_dc:dc>
      </metadata>
    </record>
  </GetRecord>
</OAI-PMH>
```

Below is an example of the MARC21 record:

```
<GetRecord>
  <record>
    <header>
      <identifier>oaiuoresearch.rochester.edu:2</identifier>
      <datestamp>2010-09-24T18:54:31Z</datestamp>
      <setSpec>3</setSpec>
    </header>
    <metadata>
      <oai_dc:xsi:schemaLocation>
        http://www.openarchives.org/OAI/2.0/oai_dc.xsd http://www.openarchives.org/OAI/2.0/oai_dc.xsd</oai_dc:xsi:schemaLocation>
      <dcterms:R+ User Manual@dcterms:title>
        <dcterms:Book@dcterms:type>
        <dcterms:Fri, 24 Sep 2010 14:54:31@dcterms:modified>
        <dcterms:Fri, 24 Sep 2010 14:54:31@dcterms:modified>
        <oai_dc:dc>
      </metadata>
    </record>
  </GetRecord>
</OAI-PMH>
```
  <responseDate>2011-07-26T14:53:20Z</responseDate>
  <GetRecord request="GetRecord" identifier="oai:uir:research.rochester.edu:6980" metadataPrefix="marc21">
    <record>
      <header>
        <identifier>oai:uir:research.rochester.edu:6980</identifier>
        <timestamp>2011-07-26T14:53:20Z</timestamp>
        <setSpec>13</setSpec>
      </header>
      <metadata>
        <record xmlns="http://www.loc.gov/MARC21/slim">
          <leader>00000nn--0000K4500</leader>
          <controlfield tag="005">|d</controlfield>
          <controlfield tag="007">|i</controlfield>
          <controlfield tag="008">|s2009</controlfield>
          <datafield ind1="1" ind2="" tag="100">
            <subfield code="a">Sarr, Nathan Daniel</subfield>
          </datafield>
          <datafield ind1="1" ind2="" tag="245">
            <subfield code="a">The IR + Administration Documentation</subfield>
          </datafield>
          <datafield ind1="4" ind2="0" tag="856">
            <subfield code="u">http://hdl.handle.net/2083/7455</subfield>
          </datafield>
        </record>
      </metadata>
    </record>
  </GetRecord>
</OAI-PMH>