Chapter 2: Getting Started

The following topics are covered in this chapter:

- ✓   A brief Glossary
- ✓   First-time login to the DAITSS Workflow Interface
- ✓   Creating an Operator User
- ✓   Creating DAITSS Accounts
- ✓   Creating Projects in Accounts
- ✓   Creating Affiliate Users

Brief Glossary

DAITSS Users: DAITSS Users are either Operator Users or Affiliate Users as defined below.

DAITSS Operator Users: DAITSS Operator Users have maximum privileges in the repository and can perform the following operations:

- Create/modify/delete Users, Accounts, and Projects
- Submit, Disseminate and Withdraw materials in any Account, when appropriate.
- Manage processing of materials within the DAITSS repository

DAITSS Affiliate Users: DAITSS Affiliate Users are non-operator users that are associated with a specific DAITSS Account and can perform the following operations:

- Submit materials for the Account to which they're assigned
- View materials in the Account to which they're assigned

DAITSS Accounts: DAITSS Accounts generally reflect distinct organizations or administrative units within an organization that have a contractual relationship with the archive.

- All 'Affiliate' type users must be tied to an Account.
- Conceptually, an 'Affiliate' user is an employee or agent of the institution or administrative unit reflected in the Account.

DAITSS Projects: DAITSS Projects are used to group materials within an Account but otherwise have no other function within the repository.

1. Project structure can vary according to the needs of the Account holders.
2. Project codes can be helpful when creating reports from the DAITSS preservation database.

First-time login to the DAITSS Workflow Interface

To log into the DAITSS Workflow Interface, point your browser at the URL to the DAITSS Workflow Interface. (This URL will vary according to the specific instance being used.)

A login screen will be displayed. Use the default Operator User: daitss and password: daitss for first-time login and click "login":

Creating an Operator User

The DAITSS Workflow Interface is installed with a default Operator User. To simulate the creation of your own DAITSS repository you should create your own Operator User, as follows:

- Click on the "admin" tab in the Operator's Toolbar at the top of the page
- In the "admin" tab, click on the "users" link.
- Select "operator" from the "type" pulldown menu
- Fill in all required fields, ignoring "account" and "permissions" settings (Operator Users have access to all actions in all accounts):

dashboard : packages : errors : workspace : stashspace : batches : requests : log : admin

admin

- accounts
- projects
- users

create new user

type	operator ▼
account	ACT ▼
permissions	☑ disseminate ☑ withdraw ☑ peek ☑ submit ☑ report
id	Ollie_Operator
password	••••••
first	Ollie
last	Operator
email	ollie@any.edu
phone	(999)555-1212
address	Any University 1 University Parkway Anytown, USA

Create User

- Click on "Create User" to create the new Operator User.
- Click on the "dashboard" tab in the toolbar at the top of the page and log out.
- Log in as the new Operator User and proceed with initial Account and Project setup.

Creating DAITSS Accounts and Projects

Before you can submit packages to the repository for archiving you must create at least one Account and one Project. (Note that the DAITSS demonstration repository is set up with one default Account, "ACT", and one default Project, "PRJ", which can be used to archive the demonstration packages.)

DAITSS Account and Project codes allow a DAITSS repository to archive materials from a number of different organizations or administrative units while keeping users and materials administratively separate.

Valid DAITSS Account and Project codes must be included in DAITSS Submission Information Package (SIP) descriptor files. See Chapter 5 for DAITSS SIP specifications and examples.

Creating an Account

- Click on the "admin" tab in the Operator's Toolbar
- Click on the "accounts" link
- Fill in the account id code and a description of the account and click "Create Account" to create the Account. (Note that the DAITSS demonstration repository will not be configured to email processing reports, so leave the third field blank. Reports can also be retrieved via the DAITSS Workflow Interface.)
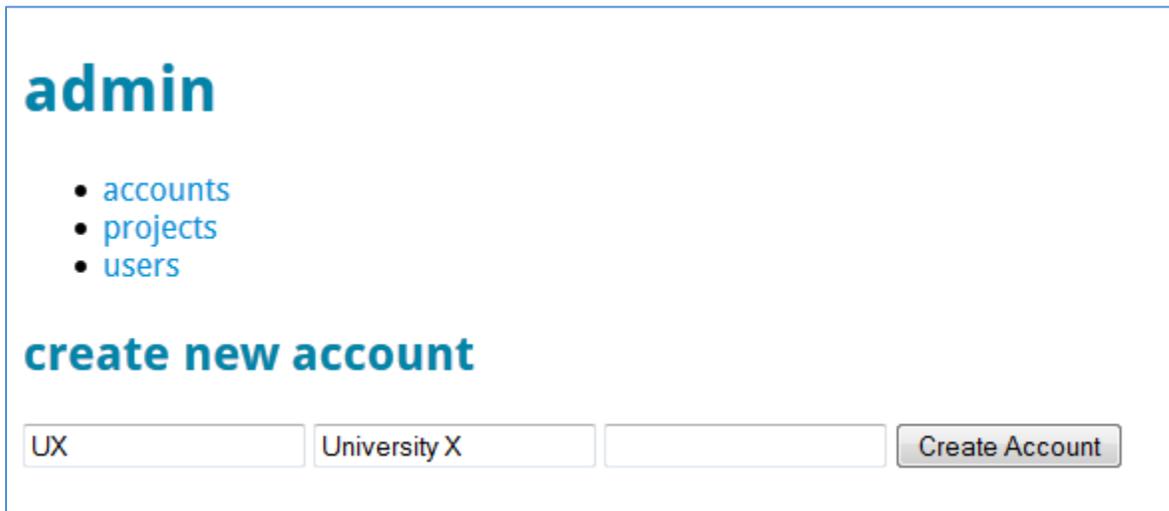
admin

- accounts
- projects
- users

create new account

UX	University X		Create Account

Creating a Project

- From the "admin" tab in the Operator's Toolbar click on the "projects" link
- Use the Account pulldown menu to select the Account to which the new Project will be tied.
- Fill in the new Project code and a text description of the Project
- Press "Create project" to create the project:

Create Affiliate Users

Once DAITSS Accounts have been created you can create DAITSS Affiliate Users who will be associated with a specific Account:

- Click on the "admin" tab in the Operator's Toolbar at the top of the page
- In the "admin" tab, click on the "users" link.
- Select "affiliate" from the "type" pulldown menu
- From the "account" pulldown menu the Account to which this user will be linked.
- Set this user's permissions by clicking in the check boxes. (Note that the ability for Affiliate Users to disseminate and withdraw packages from the repository is not yet implemented in DAITSS, neither is the "peek" function to view package contents.)
- Fill in all required fields, and click "Create User":

You're now ready to use the DAITSS demonstration repository to archive the sample Submission Information Packages (SIPs) provided.

Submitting a Sample SIP

Sample SIPs are provided in the /var/daitss/sample-packages directory of the demonstration DAITSS installation, and a sample SIP that's ready to archive can be downloaded from http://daitss.fcla.edu and saved to your local machine.

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To archive a sample SIP:

1. Point a Web browser at the DAITSS Workflow Interface URL (We recommend either FireFox or Safari.)
2. Log on using the Operator User created above or, if you have not created a new Operator User, use the default "daitss" user and "daitss" password:
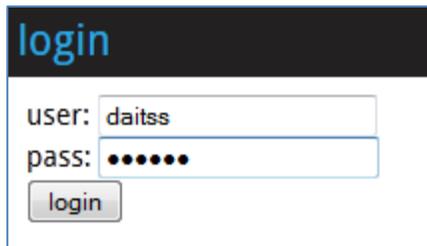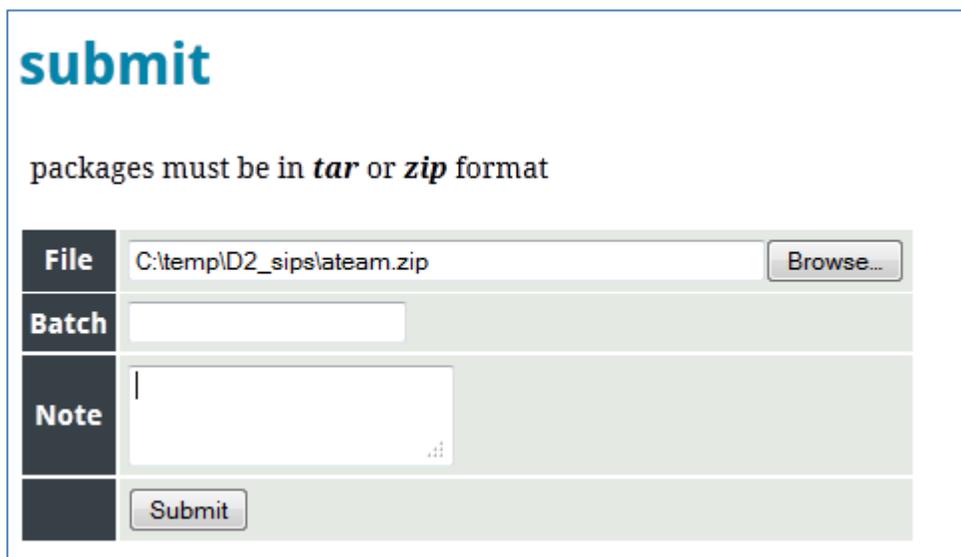

3. Click on the "packages" tab in the Operator's Toolbar at the top of the page:

4. In the "submit" portion of the page, click the "Browse" button to find the "ateam.zip" demo SIP you've downloaded to your local machine, highlight it and click "Open". You should see the location of your copy of "ateam.zip" in the "File" section of the "submit" screen:

5. Click on the "Submit" button.
6. After a few moments you should see the following screen that displays the successful submission of the "ateam" SIP:

dashboard : packages : errors : workspace : stashspace : batches : requests : log : admin

EMCDAVCMA_6CK5LU : ingesting (idle)

sip name	account	project
ateam	ACT	PRJ

events

type	time	agent	comments	notes
submit	Mon Oct 24 2011 02:42:32 PM	daitss	0 comment(s)	

legacy events

type	time	agent	comments	notes

show fixity events

If the Pulse Daemon is running, refreshing the browser window will display detailed information about the archived demo SIP:

dashboard : packages : errors : workspace : stashspace : batches : requests : log : admin

EMCDAVCMA_6CK5LU : archived

sip name	account	project
ateam	ACT	PRJ

events

type	time	agent	comments	notes
submit	Mon Oct 24 2011 02:42:32 PM	daitss	0 comment(s)	
ingest started	Mon Oct 24 2011 02:42:34 PM	SYSTEM	0 comment(s)	
ingest finished	Mon Oct 24 2011 02:43:46 PM	SYSTEM	0 comment(s)	

legacy events

type	time	agent	comments	notes

show fixity events

ingest stats

name	value
elapsed time	72.0 sec

requests

submit request

disseminate ▾ [   ] Request

aip

title	The (fd)A Team
aip descriptor	mets descriptor
descriptor errata	
copy url	EMCDAVCMA_6CK5LU.tar
report	ingest report
report stylesheet	report stylesheet
aip size	1454080
copy sha1	670fa97d06384b065ff9dc089226c3b762c2c6a7
copy md5	fd3958342ae46e8e576b91a82cd814f3
number of datafiles	2
number of submitted datafiles	2

For detailed information about the DAITSS Workflow Interface and the DAITSS Archiving process, consult Chapters 5 and 6 of this User Guide.