

Administrator's Guide

Version 2.0

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Introduction

Organizations which need to preserve and make their publications / documents available to users in open as well as controlled way, such as libraries, educational and research institutes, banks, hospitals and government departments can effectively use *Webgenic eLibraryPlus Server* to meet their objectives.

Feature Summary

- Provides comprehensive functionality for running documents management, e-library setup and more
- Manage & host all of your existing digital and scanned publications
- Create new digital publications such as documents, books, magazines, newsletters and more
- Webgenic eLibraryPlus Server Supports for multiple input document types such as MS Word, Text, PDF, OpenOffice and more
- Make publications available to worldwide users over the internet or for internal office use over the intranet
- Ideal for running a paperless office

For a complete usage details, please refer to Webgenic eLibraryPlus Server User Guide

Document purpose and scope

This administrator guide aims to provide a detailed description of features used for the administration of the Webgenic elibraryPlus Server application. It includes topics such as:

- User Management
 - Add/edit a user
 - Reset user password
 - Assigning roles to user(s)
 - Upload user list to auto create large number of users
- Publication Category Management
 - Add/remove/edit ebook category
- Publication Metadata Management
 - Add/remove/edit ebook category

Document History

Version	Version Date
2	02/06/17

Intended Audience

• Users who has been given responsibility of administration of e-Library

1. Role Based Access To Functionality

Webgenic eLibraryPlus Server comprises of following levels of functions:

General Level Functions

• Limited functionality such as reading open-to-all or authorized publications, send subscription requests, queries to publication authors etc.

Author Level Functions

 Higher level of functionality such as create new publications, add members to publication building team, assign properties such as categories, metadata to publications, define publication access control and more.

Library Admin Level Functions

• Create and manage users, publication categories, metadata sets and more.

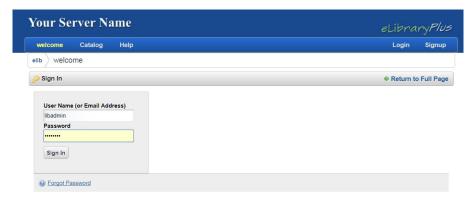
• System Admin Level Functions

• Highest level of functionality. Can manage system level functionality such as add/update functional components, change layouts, add/update help articles and more

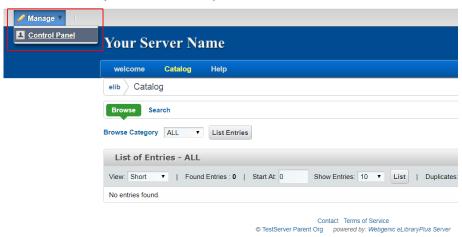
Every user who is registered (signed-up) with the eLibraryPlus Server is assigned specific role based on organization's policy.

2. User Management

Login as library administrator (e.g. libadmin)



Administration functions are available at top left corner menu through $Manage \rightarrow Control\ Panel$. To access, click on $Control\ Panel$ (see red box below)

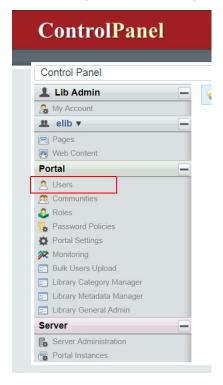


You will see Control Panel as seen in the image below.

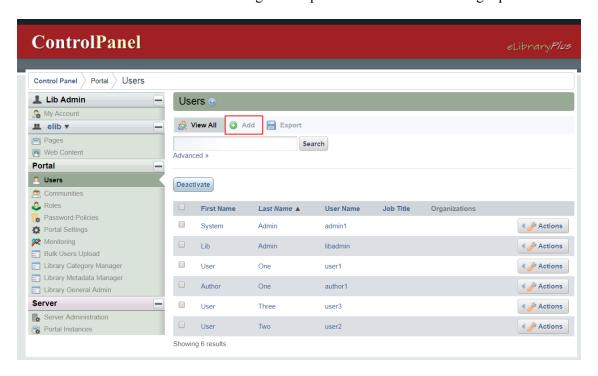


Create User (User Signup)

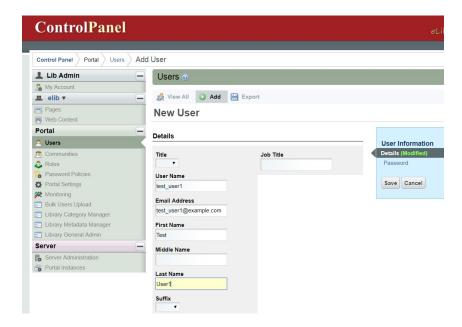
Please click on Users in the panel on the left (see red box below)



You will now see additional controls on the right hand panel. Click on Add in the right panel.



You will now see a user detail form like shown below:

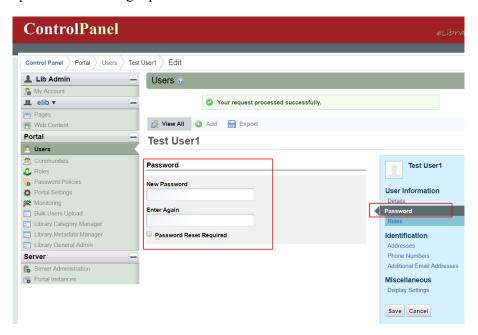


Enter following essential details:

- User Name (login name)
- Email Address
- First Name
- Last Name

and click on Save button (other details are optional)

Now click on *password* in the right panel.

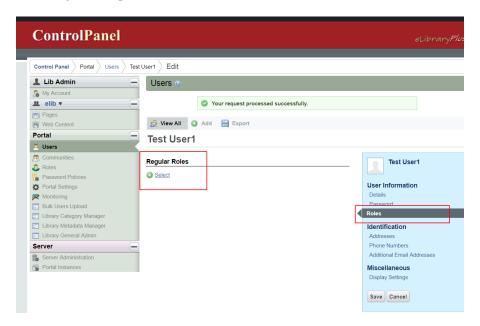


Enter desired password for the user and Save button. This finishes new user creation process.

Assign Role

For general user for whom limited elibrary accessibility is desirable, you do not need to assign any role. Such users can see ebook catalog, read ebooks which have open-to-all access and can also request for ebook subscription. For other users who need higher functionality (e.g. author), please follow instructions below.

Click on Roles in the right hand panel and then click on *Select* in the center (see red boxes below)



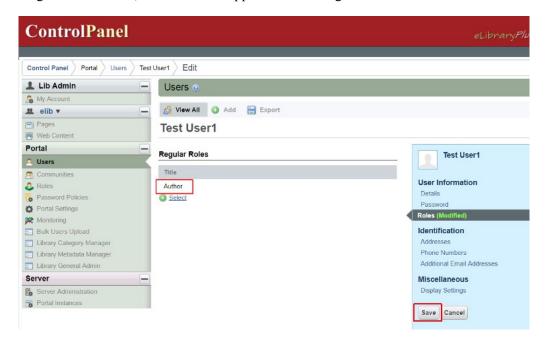
This will pop up a dialog box showing available roles as shown below:



Click on desired role. Following roles are relevant for the elibrary functionality:

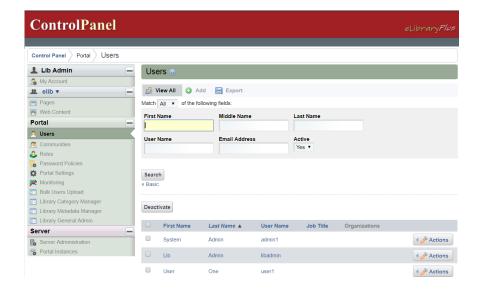
- Administrator: eLibrary Administrator. To be assigned to experienced, technical users only who are responsible of full elibrary administration.
- Author: For creating/managing ebooks.
- *fee-elib-access*: For read-only access to all ebooks in the elibrary. Suitable for organization's staff who need access to all ebooks in the elibrary.

After clicking on desired role, will see that it appears in the assigned roles list for the user. Click on Save.



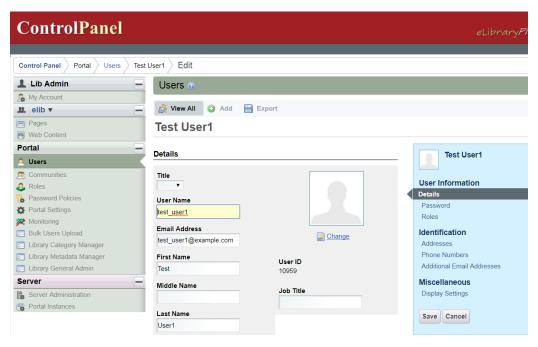
Search User

To see the created user in the user list, click on the *user* in the left panel. You can also search the user by *user name*, *first name* etc. Click on *Search* button.



Edit User

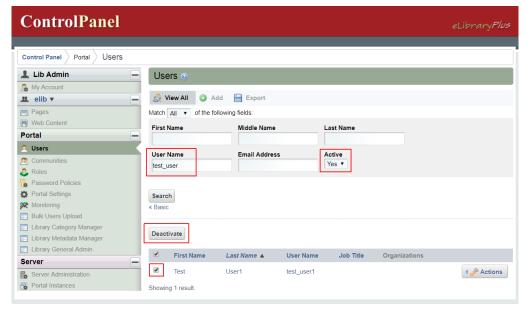
To edit user information, click on $Actions \rightarrow Edit$. This will open user details panel on the right. Make changes and click on Save button.



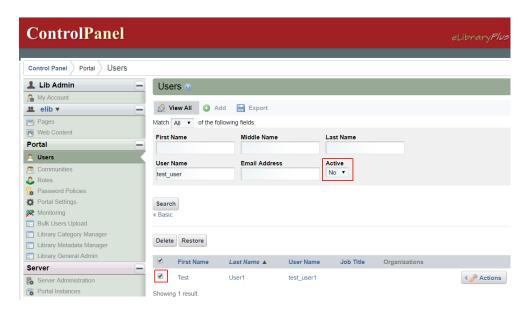
Delete User

To delete a user, you need to follow a two step process.

• First list or search users as described in the search user above. Make sure *Active* option is *Yes* during listing or searching. Once you see list of user(s) to be deleted, click on check box next to the user(s) to be deleted. and click on *Deactivate* button. (see red boxes below)

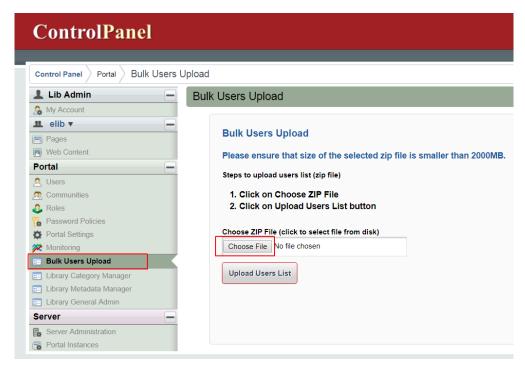


• Now go to *Active* option in the search fields above and select *No* and click on *Search* button. You will see a list of deactivated users. Click on check box next to the user(s) to be deleted and click on *Delete* button. (Here you can also restore (reactivate) users who have been deactivated by clicking on Restore button)



Bulk Upload of New Users (Auto Add Large Number of Users)

If you need to add large number of users to the elibrary, you can do so using Bulk Users Upload tool.



To use this tool, you need to create a CSV (Comma Separated Values) file which contains user information. You can use any spreadsheet software (e.g. MS Excel, OpenOffice Calc) to create this. You need to create the CSV file containing following columns (fields):

- First Name: First Name of user
- Last Name: Last Name of user
- Email ID: Email address of user
- Password Prefix: Server creats password starting with this prefix
- Password Suffix: Server creats password ending with this suffix
- *Free Access:* Specify "yes" (without quotes) if needs free read-only access to all ebooks for this user. (useful for creating organization staff account who need free read-only access)

Specify these as column header in the first line. (Password Prefix and Password Suffix are optional) Then add all users' information in lines below with one user information per line. A sample CSV file is shown below:

	А	В	C	D	E	F
1	First Name	Last Name	Email ID	Password Prefix	Password Suffix	Free Access
2	AAAA	BBBB	aaaa_bbbb@example.com		#@TEMP	yes
3	CCCC	DDDD	cccc_dddd@example.com		#@TEMP	no
4						

CSV file viewed as spreadsheet (e.g. in MS Excel, Open Office Calc etc)

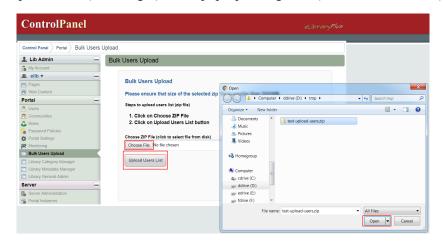
```
test-upload-users.csv

1 First Name, Last Name, Email ID, Password Prefix, Password Suffix, Free Access
2 AAAA, BBBB, aaaa_bbbb@example.com,, #@TEMP, yes
3 CCCC, DDDD, cccc_dddd@example.com,, #@TEMP, no
4
```

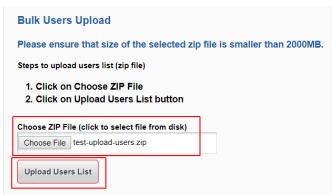
CSV file viewed as Text file (e.g. in Notepad)

Once all the user information is added, create a compressed (ZIP) file of the CSV file. On Windows, you can use steps select file \rightarrow right click \rightarrow Send To \rightarrow Compressed Zipped Folder option. This will create a compressed ZIP file with .zip extension (e.g. *test-upload-users.zip*)

Once .zip file is created, go back to *Control Panel* \rightarrow *Bulk Users Upload* and click on *Choose File* button. This will pop-up an *Open* dialog box. Go to the folder where the zip file is created. Select the zip file and click on *Open* button (lower right) in the pop-up dialog box. (see red boxes below)



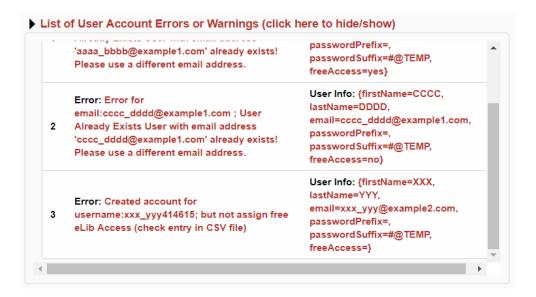
You will see name of the zip file appear next to the *Choose file* button. Then click on *Upload Users List* button. (see red boxes below)



Server parses the uploaded CSV file and auto creates login accounts for users in the file and generates report as shown below:



If you try to upload the file containing same user information again (or if there is any error in user information), you will get report like shown below:



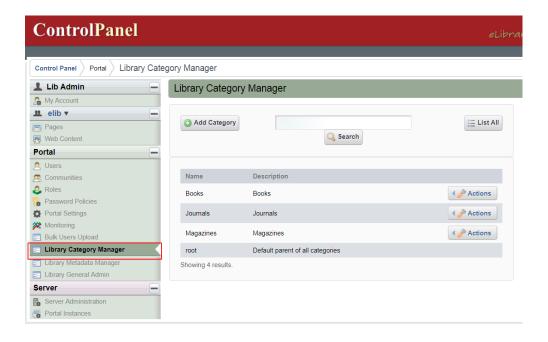
During bulk upload, server automatically sets username and password for the user account using *emailAddress*, *PasswordPrefix* and *PasswordSuffix* information provided for the user. For example,

- In CSV file shown above, the username (login name) for the user AAAA BBBB (with email address aaaa_bbbb@example.com) will be aaaa_bbbb and password will be aaaa_bbbb#@TEMP.
- If user exists with same email address, error will be generated.
- If does not exits with same email address, but another existing user has same username, the new user will be created with username attached with auto-generated number suffix (e.g. aaaa bbbb4321)
- If PasswordPrefix was defined as 123 the password would be 123aaaa bbbb#@TEMP.
- If PasswordPrefix and PasswordSuffix both are blank, the password would be same as username (i.e. aaaa bbbb)

Users whose accounts have been created successfully can now login using their email address (or username) and password. Once logged in, they can change their personal information such as username, password etc by going to $Goto \rightarrow Account Settings$

4. Manage Categories

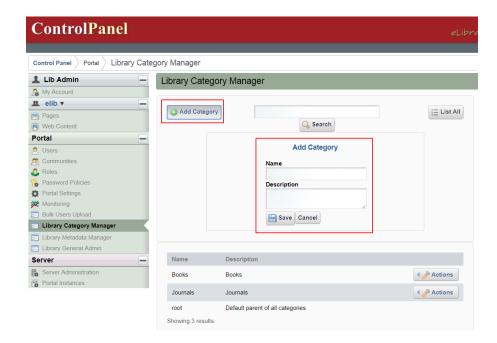
The elibraryPlus server supports assignments of multiple categories to an ebook. These categories can be managed using the *Library Category Manager*.



Click on *Library Category Manager* in *Control Panel*. You will see the Category Manager's panel on the right side.

Add Category

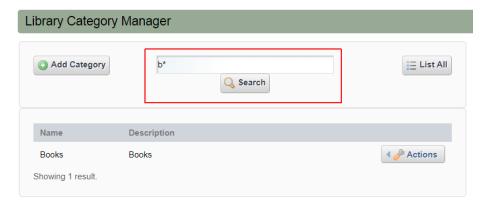
Click on *Add Category* button. This will open controls to input *Name* and *Description* of the category.



Enter desired values and click on Save button.

Search Category

Type few characters of the category and * (e.g. b*) and click on Search button.



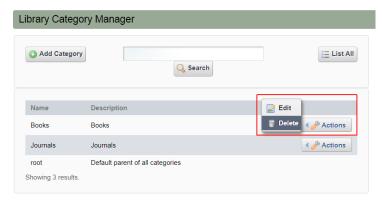
List All Categories

Click on List All button.



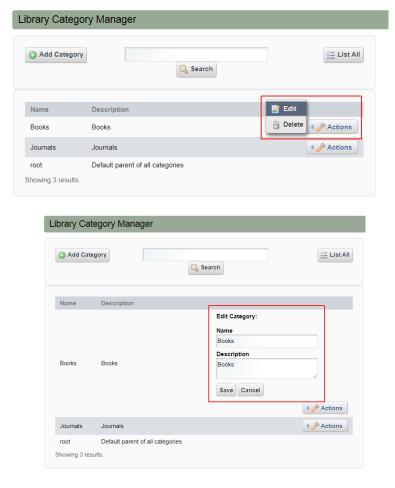
Delete Category

List all or search categories. Once you see a list, click on $Action \rightarrow Delete$ button next to the desired category.



Edit (Update) Category

List all or search categories. Once you see a list, click on $Action \rightarrow Edit$ button next to the desired category. This will show options to edit Name and Description. Type new values and click on Save button.



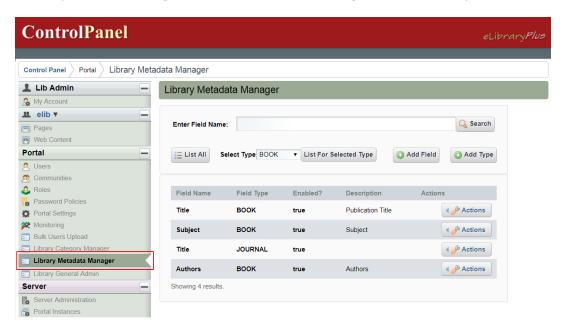
4. Manage Metadata

As the elibrary server is a also a multi-purpose *Document Management Server*, it supports customizable metadata including multiple metadata sets. For example you can create *Type* (a sets of metadata) and each one of this set having its own *fields* as shown in the example below:

- Type: BOOK
 - o fields: Title, Subject, Authors, Date of Publication
- Type: JOURNAL
 - o **fields**: Title, Subject, Editors, Issue Number, Volume Number
- Type: INVOICE
 - o **fields**: Number, Vendor, Tax ID, Payment Status

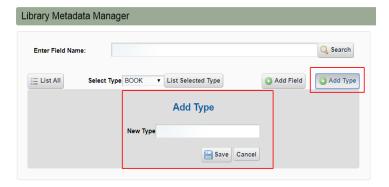
As you can see, there is no limit of type of metadata you can create in the elibrary server.

Click on Library Metadata manager to access the metadata management fucntionality



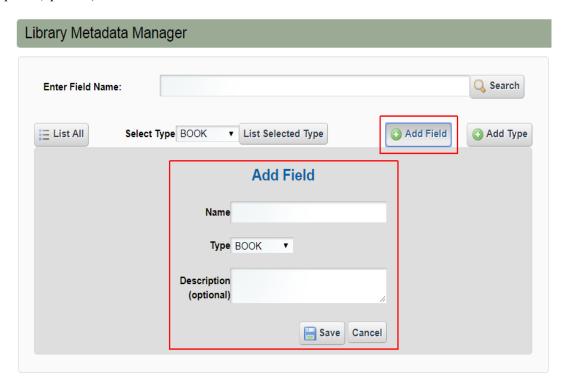
Add Metadata Type

Click on Add Type button (upper right corner). Enter New Type value and click on Save button



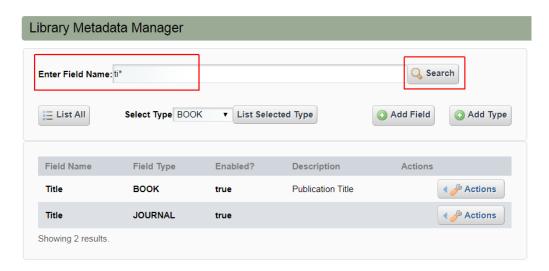
Add Field

Click on Add Field. This will open controls to *Add Field*. Enter Name, select *Type* (from drop down list), *description (optional)* and click on *Save* button.



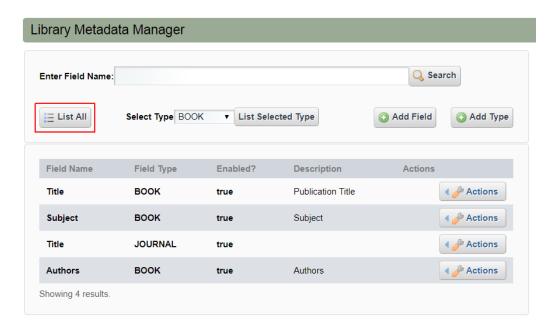
Search Field

Type full or partial (e.g. ti^*) word and click on *Search* button.



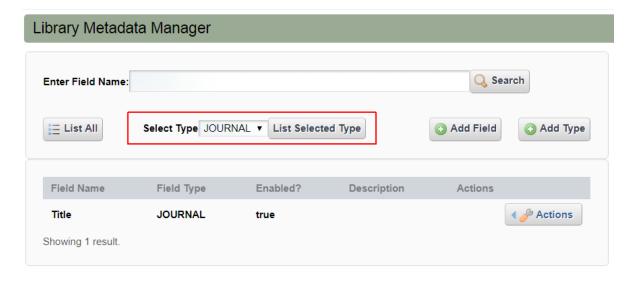
List All Fields

Click on *List All* button to view list of all existing fields.



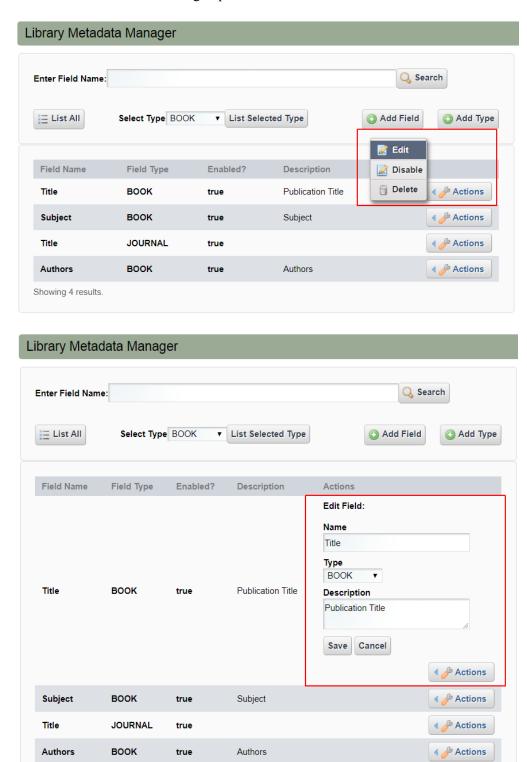
List Fields of Specific Type

Select desired field *Type* from the drop down list and click on *List Selected Type* button. You all see a field list of selected type.



Edit Field

Click on $Action \rightarrow Edit$ for a field. Change/update values and click on Save button.



Delete Field

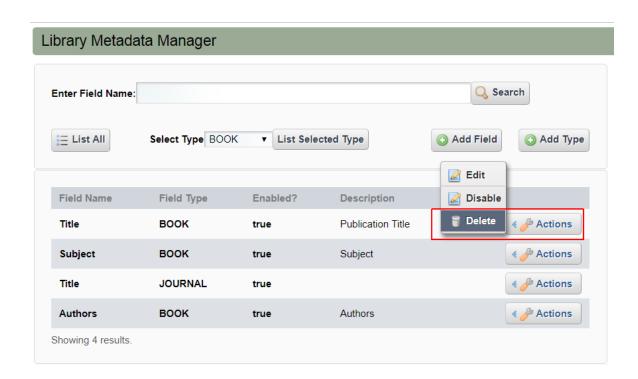
Click on $Action \rightarrow Delete$ for a field.

Please note:

For security purpose, if any field is already in use (i.e. if value has been assigned to the field in any ebook), you will not see delete option when you click on *Action* button for the field. But if you wish to change the name of this field, you can use *Edit Field* option described above.

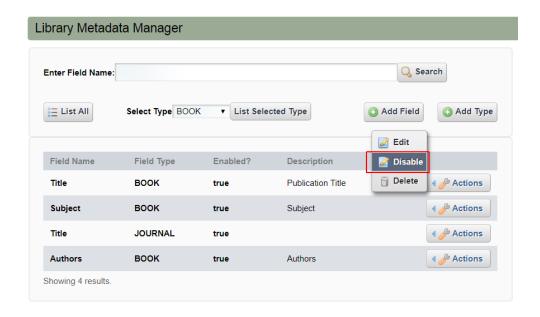
But if you have to delete this field, you will need to clear values assigned to this field in all the ebooks. To do this, follow these instructions:

- Visit *Catalog*. Then go to *Search* → *Advanced Search* and search for this field value (type * as value).
- You will get a list of ebooks where this field has been assigned value. Find out who is the author of each book by click on the ebook thumbnail in the list.
- Ask each author to login and visit My Pages \rightarrow My Books to view/search the desired ebooks. Then click on $Action \rightarrow Edit\ Book\ Properties$ for the ebook.
- Click on *Metadata* tab and clear value assigned to the field.
- Once values for all ebooks have been cleared, login again as *libadmin* and visit *Library Metadata Manager* again to delete the field.



Disable Field

Disabling a field will prevent it from appearing in the *Metadata* section of the ebooks. Click on Action \rightarrow Disable to disable a field.



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