Digital Resource Commons
Authorizations - Creating and Modifying Groups, Users, and Permissions

There are two parts to this document – creating and editing groups and user accounts, and then managing the authorizations that are available to those accounts.

This document assumes that:
　The reader has an administrator user account for a DRC instance.

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The Sidebar Menu

This document refers frequently to the "sidebar menu." This menu usually appears on one side of your browser window and changes to reflect the context of your user at any given time. So, for example, if you are not logged in, you only see the "Browse" and "My Account" sections.

If you are logged in, but not an administrator, you will also see two additional options under "My Account:" "Profile" and "Submissions." Clicking on "Profile" takes you to a page for editing your user information, including your password. Click on "Submissions" to view pending or saved item submissions or tasks in your pool.

The Context menu appears when you are viewing a community, collection or item, and lists the actions you are able to perform based on your permission levels. To edit permissions and authorizations for a collection or community, you must be a system admin, or have the rights to edit that collection.
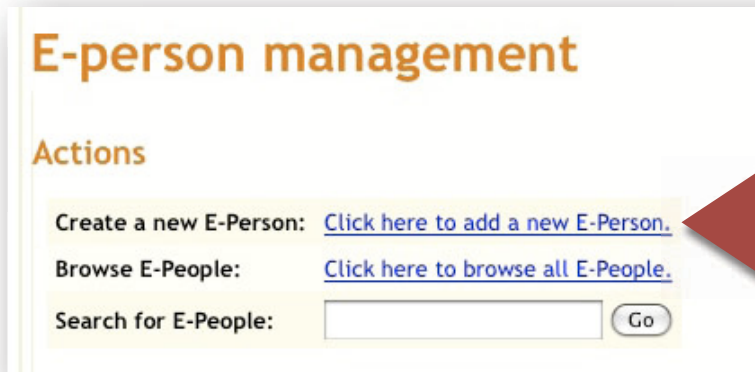
The part of this menu we will refer to most frequently in this document is the Administrative section. This will only appear to you if you are logged in as an administrator, and contains all the links you need to manipulate user accounts, groups, and permissions.

E-People and Groups
DSpace refers to user accounts as "E-People." You can create groups of E-People, which will allow you to assign permissions to a group of users at once.

A. *Create a User, or E-Person*
1. Log in to the DRC with an admin user.
2. In the sidebar menu, under the "Administrative" menu, there is a sub-menu called "Access Control." Click on the first item in this menu: "People"
3. This takes you to the E-Person management page. At the top of this page, under "Actions", click on "Click here to add a new E-Person."

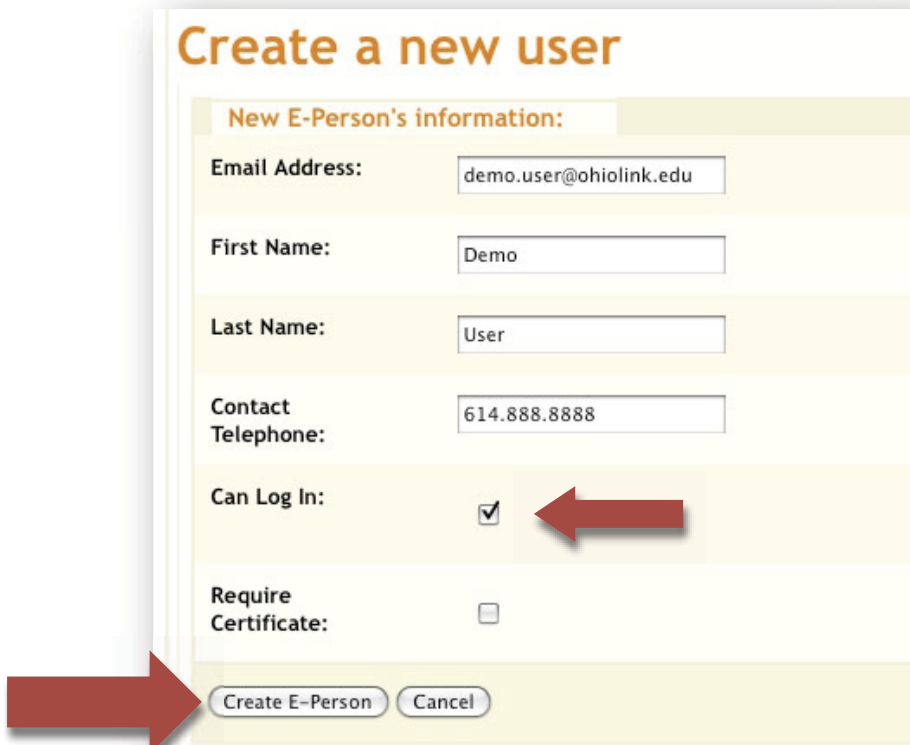4. Fill in the user's email address, first name, last name and telephone number as prompted.

5. Click in the box under "Can Log In:"
6. Click on "Create E-Person."

Notice

The user was added successfully.
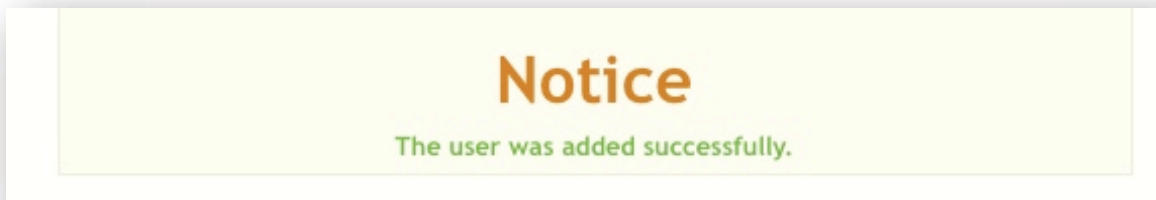
7. You should see a message that reads, "The user' was added successfully."
8. Email the user to let them know that their account has been created and:
    i.   Send them the instructions to log in for the first time. (See Appendix A)
    ii. Reset their password so that they receive an email to select a password. (See Edit or Delete a User)

B. ***Edit or Delete a User***
1. Log in to the DRC with an admin user.
2. In the sidebar menu, under the "Administrative" menu, there is a sub-menu called "Access Control." Click on the first item in this menu: "People"
3. This takes you to the E-Person management page. Find the account you'd like to edit – either by scrolling through the list, or typing one part of their name (no spaces) in the search box and clicking "Go"
4. Click on the name of the user you'd like to edit.

E-person management

Actions

Create a new E-Person:	Click here to add a new E-Person.
Browse E-People:	Click here to browse all E-People.
Search for E-People:	[ ] (Go)

Search results

	ID	Name	Email
☐	1	Test Account	
☐	2	Meghan Frazer	frazerm@kenyon.edu

5. You can do three things from here: Modify information, Reset the user's password, or Delete the user.

Edit an E-Person

Meghan Frazer's information:

Email Address: frazerm@kenyon.edu

First Name: Meghan

Last Name: Frazer

Contact Telephone:

Can Log In: ☑

Require Certificate: ☐

> To Modify information, just change the text in the desired fields, and click on Save. Be careful – if you uncheck "Can Log In:" the user will no longer be able to log in to the system.

> To Reset the user's password, click on "Reset Password."

> To Delete the E-Person:
> 1. Click on "Delete E-Person."
> 2. You will be directed to a confirmation page. Click on "Confirm Deletion" to delete, or "Cancel" to return to E-person management page.

You may also permanently remove this E-Person from the [...] *reset his/her password. When resetting a password* [...] *sent an email containing a special link they can* [...] *new password.*

(Reset Password) (Delete E–Person) (Login as E-Person)

(Save) (Cancel)

Groups this E-Person is a member of:

- Anonymous
- Administrator
- Demo Group

6.   Click on Save when you've finished making changes.

C. *Create a group*
1. Log in to the DRC with an admin user.
2. In the sidebar menu, under the "Administrative" menu, there is a sub-menu called "Access Control." Click on the second item in this menu: "Groups"
3. This takes you to the Group management page. At the top of this page, under "Actions", click on "Click here to add a new Group."

4. In the first box, next to "Change group name:" type in the name of this group.

5. In the second box, next to "Search members to add:" you can search for users or groups.
   i. To search for a user, type in a portion of the user name you'd like to add to this group (no spaces) and then click on "E-People…"
   ii. To search for a group, type in a portion of the group name you'd like to add to this group (no spaces) and then click on "Groups…"

6. Click the "Add" button to the right of the user name or group you'd like to add to this new group.

7. Repeat steps 5 & 6 until you have the members you want.
8. Click on "Save" to save the group.

D. **Edit a group**
   1. Log in to the DRC with an admin user.
   2. In the sidebar menu, under the "Administrative" menu, there is a sub-menu called "Access Control." Click on the first item in this menu: "Groups"
   3. This takes you to the Group management page. Find the group you'd like to edit – either by scrolling through the list, or typing one part of the group name (no spaces) in the search box and clicking "Go"
   4. Click on the name of the group you'd like to edit.

5. From this screen, you can do the following: Change the group name, Remove members, Add members. **This an important screen, because authorizations are modified using groups, so you will see this screen again and again.**

To change the Group name, type your corrections into the first text box, next to "Change group name:"

To Remove a member, click on the "Remove" button to the right of their name. You will now see a "Pending" message next to their name until you click on "Save."

i. To Add a member, you can select from existing users or groups.
   a. To search for a user, type in a portion of the user name you'd like to add to this group (no spaces) and then click on "E-People…"
   b. To search for a group, type in a portion of the group name you'd like to add to this group (no spaces) and then click on "Groups…"

   c. Click the "Add" button to the right of the user name or group you'd like to add to this new group.
   d. The user or group name will show up in the Members list as "Pending."
   e. Repeat steps above until you have the members you want.
6. After making all desired changes to group, click on "Save."
7. You should see a message that reads, "The group was edited successfully."

E. ***Delete a group***
   1. Log in to the DRC with an admin user.
   2. In the sidebar menu, under the "Administrative" menu, there is a sub-menu called "Access Control." Click on the first item in this menu: "Groups"
   3. This takes you to the Group management page. Find the group you'd like to edit – either by scrolling through the list, or typing one part of the group name (no spaces) in the search box and clicking "Go".

Group management

Actions

Create a new group: Click here to add a new Group.
Browse groups: Click here to browse all Groups.
Search for groups: [   ]   (Go)

Click in the box to the left of the group name to select it.

Search results

	ID	Name	Members	Community / Collection
	1	Administrator	2	
	0	Anonymous	-	
☐	2	COLLECTION_1_ADMIN	-	Test Collection [View]
☐	3	Demo Group	1	

Click on "Delete Groups."

(Delete groups)

4. Click on "Delete" to confirm the deletion or "Cancel" to return to the Group management page.

Authorizations and Permissions

Special User – The Anonymous User

Before creating and modifying authorization policies, you should know about a special user type: Anonymous. When the DRC is accessed and the user is not logged in, that is considered an "anonymous user". This user type can be assigned permissions in the DSpace workflow. For example, if you would to collect submissions to a collection from people who do not have user accounts, you'll need to assign the anonymous user to the submitter role for that collection.

Submission Workflow

The DRC allows administrators to set up a "workflow" for a given collection, which can include approving or rejecting an item submission and editing metadata associated with a record.

From the DSpace documentation: "A collection's workflow can have up to three steps. Each collection may have an associated e-person group for performing each step; if no group is associated with a certain step, that step is skipped. If a collection has no e-person groups associated with any step, submissions to that collection are installed straight into the main archive." (DSpace 1.6.2 documenation, Sec. 2.9.1)

The image below depicts the submission process if someone is assigned to each step.
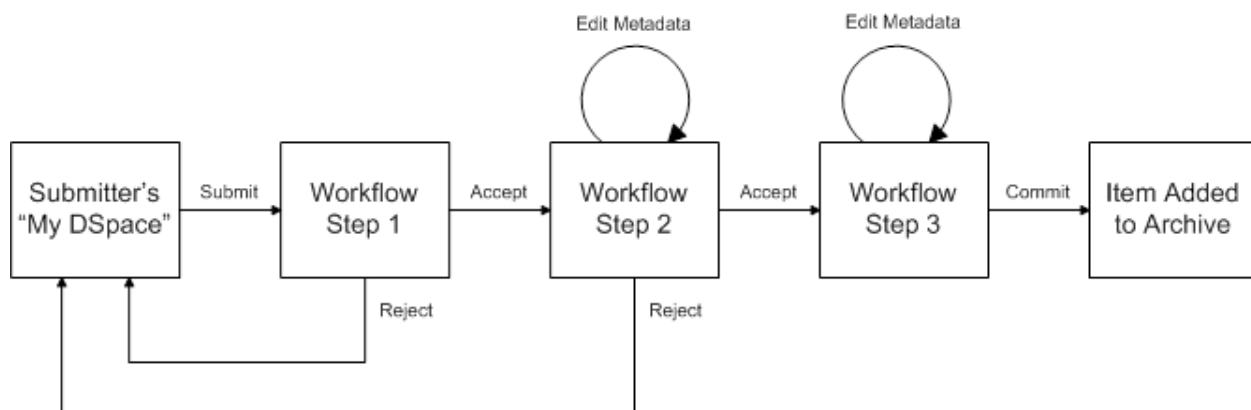
Source: DSpace documentation Section 2.9.1
http://www.dspace.org/1_6_2Documentation/ch02.html#N103C6

Workflow role descriptions from DSpace:
- **Administrators** - Collection administrators decide who can submit items to the collection, edit item metadata (after submission), and add (map) existing items from other collections to this collection (subject to authorization for that collection).
- **Accept/Reject Step** (Workflow Step 1) - The people responsible for this step are able to accept or reject incoming submissions. However, they are not able to edit the submission's metadata.

- **Accept/Reject/Edit Metadata Step** (Workflow Step 2) - The people responsible for this step are able to edit the metadata of incoming submissions, and then accept or reject them.
- **Edit Metadata Step** (Workflow Step 3) - The people responsible for this step are able to edit the metadata of incoming submissions, but will not be able to reject them.*Note* - this is only to edit metadata during the submission process. Editing metadata once an item has been added is another set of authorizations: See…
- **Submitters** - The E-People and Groups that have permission to submit new items to this collection.
- **Default Read Access** - E-People and Groups that can read new items submitted to this collection. Changes to this role are not retroactive. Existing items in the system will still be viewable by those who had read access at the time of their addition.

A. **To Manage Workflow Step Authorizations for a Collection**
   1. Log in to the DRC with an admin user, or a user who has been granted administrative rights on the collection which needs to be modified.
   2. Navigate to the collection for which you need to manage permissions.
   3. In the sidebar menu, under the "Context" menu, click on "Edit Collection."
   4. This takes you to the administrative page for the collection. Click on the "Assign Roles" tab at the top.
   5. You should see a description and edit button for six possible workflow roles

Edit Collection: Test Collection

Edit Metadata **Assign Roles** **Content Source**

Role	Associated group	
Administrators	none	Create...
	Collection administrators decide who can submit items to the collection, edit item metadata (after submission), and add (map) existing items from other collections to this collection (subject to authorization for that collection).	
Accept/Reject Step	none	Create...
	The people responsible for this step are able to accept or reject incoming submissions. However, they are not able to edit the submission's metadata.	
Accept/Reject/Edit Metadata Step	none	Create...
	The people responsible for this step are able to edit the metadata of incoming submissions, and then accept or reject them.	
Edit Metadata Step	none	Create...
	The people responsible for this step are able to edit the metadata of incoming submissions, but will not be able to reject them.	
Submitters	none	Create...
	The E-People and Groups that have permission to submit new items to this collection.	
Default read access	Default read for incoming items and bitstreams is currently set to Anonymous.	Restrict...
	E-People and Groups that can read new items submitted to this collection. Changes to this role are not retroactive. Existing items in the system will still be viewable by those who had read access at the time of their addition.	

Edit authorization policies directly.

6. From this screen, we can (i) create a group with the designated role, (ii) we can edit existing permission groups, or (iii) we can delete existing permission groups.

   i. To create a new group, click on the "Create…" button next to the role that you wish to add.
      a. Using the text box next to "Search members to add:" you can search for e-people or groups to add to this workflow step group. This screen looks the same as the "Edit Group" step from earlier.

   b. Click the "Add" button to the right of the user name or group you'd like to add to this new group.
   c. The user or group name will show up in the Members list as "Pending."
   d. Repeat steps above until you have the members you want.
   e. After making all desired changes to group, click on "Save."

   ii. To edit an existing workflow step, click on the name of the group with that permission.

   a. Using the text box next to "Search members to add:" you can search for e-people or groups to add to this workflow step group. This screen looks the same as above.

iii. To delete the group associated with a particular workflow step:
   a. Click the "Delete" button to the right of the associated group.
   b. Click "Delete" to confirm the deletion, click "Cancel" to return to the Edit Collection screen.
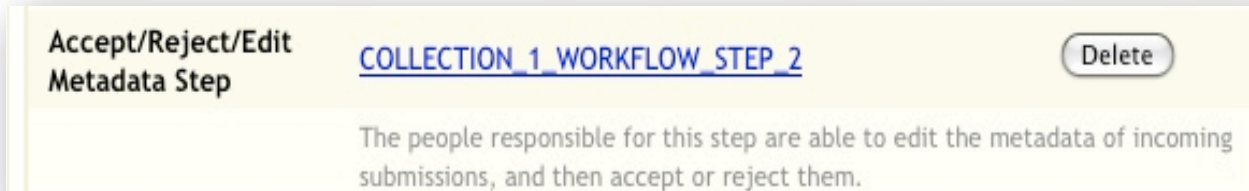
7. *Note* Submissions currently sitting at a step which is changed or deleted WILL NOT reflect any changes made here. For example, adding someone to Workflow Step 1 will only allow them to Accept or Reject new submissions, not submissions which were previously submitted.

B. **To Manage Authorizations for a Community**
   1. Log in to the DRC with an admin user or a user who has been granted administrator rights for this community.
   2. Navigate to the community for which you need to manage permissions.
   3. In the sidebar menu, under the "Context" menu, click on "Edit Community."
   4. This takes you to the administrative page for the community. Click on the "Assign Roles" tab at the top.
   5. You should see a description and edit button for one permission level:
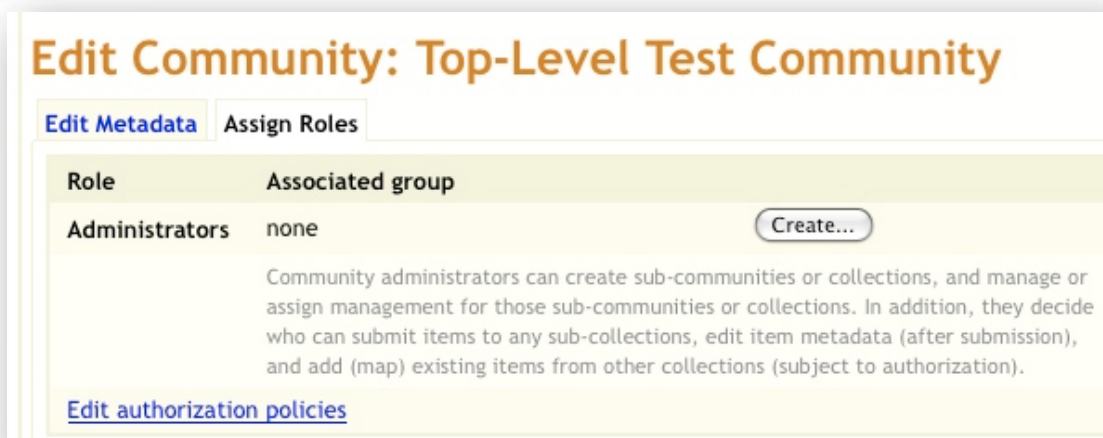
   6. From this screen, we can create a group with the designated role, we can edit an existing permission group, or we can delete an existing permission group. All of these functions work the same as they did for collections (see above).

Editing Authorization Policies Directly
You'll need to do this in order to grant permission for actions which fall outside the submission workflow, i.e. editing an existing item.

C. **To give a group permission to edit existing items**
   1. Log in to the DRC with an admin user.
   2. Click on the collection for which you need to manage permissions.
   3. In the sidebar menu, under the "Context" menu, click on "Edit Collection."
   4. This takes you to the administrative page for the collection. Click on the "Assign Roles" tab at the top.

   5. Click on "Edit authorization policies directly."

6. From here, you can add new policies, delete existing policies, edit existing policies and edit existing groups.

Policies for Collection "Test Collection" (123456789/2,ID: 1)

Click here to add a new policy.

	ID	Action	Group
☐	4	DEFAULT_BITSTREAM_READ	Anonymous [Edit]
☐	3	DEFAULT_ITEM_READ	Anonymous [Edit]
☐	2	READ	Anonymous [Edit]

(Delete Selected) (Return)

7. To add a new policy, click on "Click here to add a new policy."
8. For editing items, we need WRITE permissions. Click in the circle next to "WRITE" to select it.
9. Select the group that contains the users who need the permission.

Create new policy for COLLECTION 1

Select the action:
- ○ READ
- ◉ WRITE
- ○ ADD
- ○ REMOVE
- ○ DEFAULT_BITSTREAM_READ
- ○ DEFAULT_ITEM_READ
- ○ ADMIN

Select a group:
Administrator
Anonymous
Demo Group

Search for a group: [   ] (Search)

(Save) (Cancel)

10. Click on Save.

D. **To give a group permission to remove existing items**
   (the images for these steps are the same as above)
   1. Log in to the DRC with an admin user.
   2. Navigate to the collection for which you need to manage permissions.
   3. In the sidebar menu, under the "Context" menu, click on "Edit Collection."
   4. This takes you to the administrative page for the collection. Click on the "Assign Roles" tab at the top.
   5. Click on "Edit authorization policies directly."
   6. From here, you can add new policies, delete existing policies, edit existing policies and edit existing groups.
   7. To add a new policy, click on "Click here to add a new policy."
   8. Click in the circle next to "REMOVE" to select it.
   9. Select the group that contains the users who need the permission.
   10. Click on Save.

Appendix A - Logging In for the First Time:

1. Go to your DRC page.
2. Click on Login (in sidebar menu, under My Account)
3. Click on "Forgot your password?"
4. Type in your email address (for which the DRC account was created).
5. Click on Send Info.
6. Check your email, there should be an email from drcteam@ohiolink.edu with instructions.
7. Click on the link provided in the email.
8. Select a password and type it in each field, then click Reset Password.
9. On the next page, if you click on DRC Home, it will take you to the new user registration page. Instead, click on Communities and Collections on the left hand side of the page.