

SCOPE USER MANUAL

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Version 1.0

SCOPE is a software package that allows direct user access to Dissemination Information Packages (DIPs) in Archivematica. It is open source and licensed under the GNU Affero General Public License v3.0.

SCOPE development is managed by the Canadian Centre for Architecture (CCA) in collaboration with Artefactual Systems. It is based on a project initially conceived by Tim Walsh, the digital archivist at CCA from 2015-2018. It is a project financed within the framework of the Montreal Cultural Development grant awarded by the City of Montreal and the Quebec Department of Culture and Communications.

Revision Summary:

This version supersedes the [SCOPE User Manual, beta version](#). Major revisions include:

- 1 [Overview](#) -- updated to include Archivemata integration and filtered search.
- 2.a. [System requirements](#) -- upgraded to reflect additional requirements for the new version.
- 2.b. [Installation](#) -- updated to add mention of Archivemata Storage Service integration.
- 3.b.ii [Manually adding content: Creating Folders and linking DIPs](#) -- section title updated from "Creating Folders and linking DIPs"
- 3.b.iii [Archivemata integration and orphan folders](#) -- section added to reflect how editors can manage the Archivemata integration.
- 3.d.iii [Deleting Collections and Folders](#) -- updated to reflect how deletions can be handled with the Archivemata integration
- 3.d.iv [Creating and changing stock text](#) -- section added to reflect newly customizable stock text
- 4e [File-level](#) -- updated to reflect the ability to do filtered searching

Screenshots were updated across the document to be of higher quality.

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1 Overview

SCOPE is a software package designed for digital archives that streamlines user access to DIPs stored in Archivematica and improves file-level discoverability of digital objects.

Archives staff can create Collection- and Folder-level description, and link them to DIPs. SCOPE can optionally be configured to link to Archivematica DIP Storage so that DIPs are linked automatically during ingest. SCOPE uses the METS files in the DIPs to automatically display File-level description and additional Folder-level metadata.

Researchers can search through the Collection-, Folder-, and File-level description using keyword searching and filters, and download a copy of the DIPs on their local machine for direct access to the files.

2 Getting Started

2.a System Requirements

SCOPE is a Django application that uses Elasticsearch 6.x as search engine, Celery 4.2 to process asynchronous tasks, a SQLite database and Redis as message broker. For more information see [SCOPE on Github](#).

The following are system requirements:

- Processor, 2 CPU cores.
- Memory, 2GB:
 - 1GB JVM heap size.
 - Biggest METS file size expected.
 - Other services (Nginx, Redis)
- Disk space, the sum of:
 - ~1GB for source code, dependencies and needed services.
 - ~1GB for SQLite database and Elasticsearch data (to be revised as data grows).
 - Biggest DIP file size expected.
 - Biggest METS file size expected.
 - Total DIP storage size.

2.b Installation

For full installation instructions, see [SCOPE on Github](#).

SCOPE can also be configured to link to Archivematica DIP storage. See the Github page for configuration instructions.

3 User Groups

An account is necessary to login to SCOPE. There are four user groups:

1. **Viewers** can search the content. This role was designed with external researchers in mind.
2. **Editors** manage content. They can create Collections and Folders, and link DIPs. This role was designed with processing archivists in mind.
3. **Managers** create and edit user accounts. This role was designed with reference staff in mind.
4. **Administrators** set global preferences for Dublin Core, create other Administrators, and can delete Folders and Collections. By default, they also have all the privileges of Editors and Managers. This role was designed with digital archivists or systems administrators in mind.

User groups can be combined as needed. All users have Viewer privileges by default, in addition to whatever other user groups they may be a part of. If no user group is selected, then that user still has Viewer privileges.

If a user is not logged in, they only have access to the login page and the FAQ page.

3.a Viewers

Viewers are able to conduct research in SCOPE. See section 4. Conducting Research for more information.

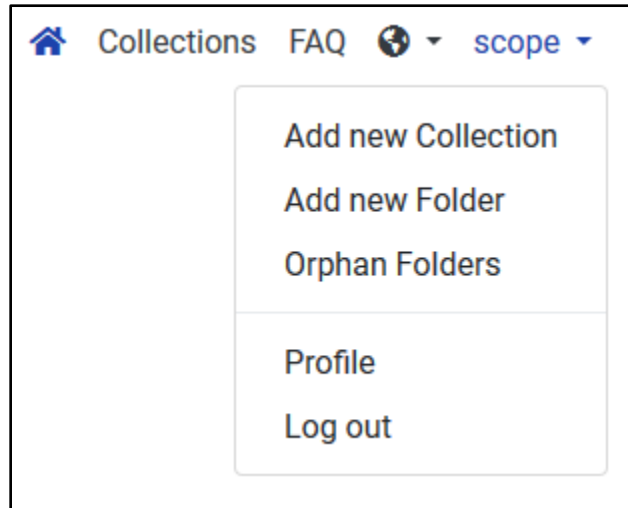
Viewer is effectively a placeholder user group, created so that the list of users is more easily sortable. All logged in users have Viewer privileges by default, in addition to whatever other user groups they may be a part of. If no user group is selected, then that user still has Viewer privileges.

3.b Editors

Editors manage content within SCOPE. They can create Collections and Folders, and link DIPs to Folders.

3.b.i Creating Collections

To create a Collection, click on the drop-down menu underneath your username in the top-right corner of any page.



Screenshot of drop-down menu

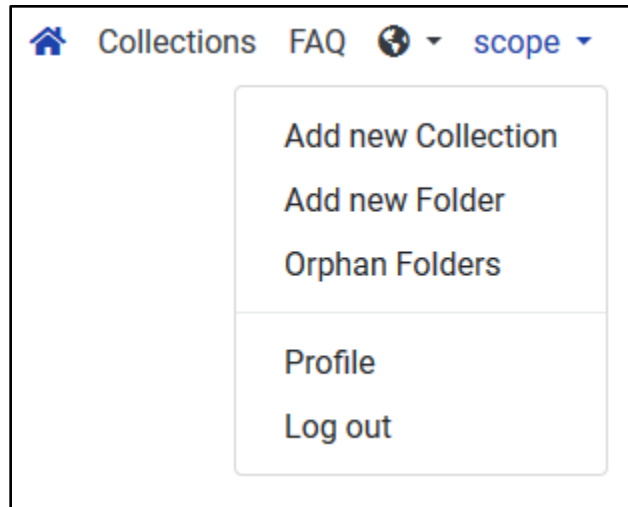
Select “Add new Collection.”

On the next screen, enter metadata in the appropriate fields according to your local metadata standards. Note that the metadata fields available are Dublin Core. When complete, click “Submit” to save your Collection.

Collections cannot be created automatically with the Archivematica Storage Service integration.

3.b.ii Manually adding content: Creating Folders and linking DIPs

To create a Folder, click on the drop-down menu underneath your username in the top-right corner of any page. Note that a Folder must belong to a Collection, and the Collection must already exist before you can add a Folder to it.



Screenshot of drop-down menu

Select “Add new Folder.”

On the next screen, enter the unique identifier of the Folder in the “Identifier” field.

Then select the identifier of the related collection from the “Collection” drop-down menu.

Finally, select the zip file of your DIP from your local computer to upload by clicking “Browse” in the “Objects zip file” field. The DIP must contain at least an objects folder (the directory name does not matter), and a METs file. The zip file must be in a .zip format, and not other compression formats.

Click “Submit.”

This will bring you to the page of the Collection for the Folder you just created. At the top of the page, there should be a blue banner that reads “A background process has been launched to extract and parse the METS file. After the process finishes and the interface is reloaded, a link to the Folder will show up in the Folders table at the related Collection page.”

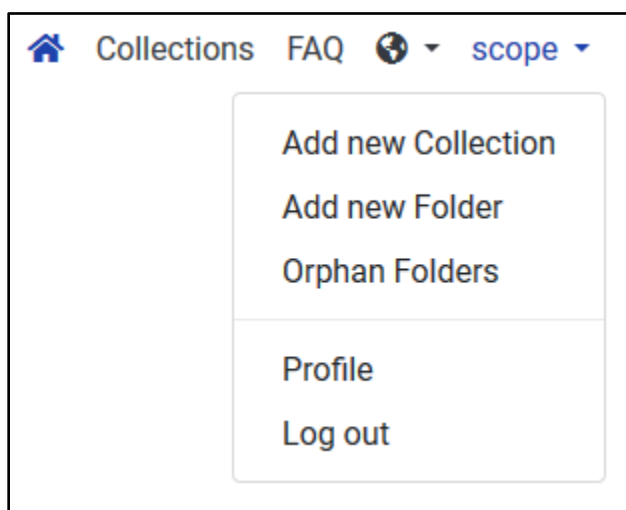
The Folder should be listed under “Folders in this collection,” and a spinning circle in the “Details” column will indicate that the application is processing the DIP. This may take some time, depending on the size of the zip file.

Refresh the page intermittently to confirm that the Folder was added successfully. When this is finished, the spinning circle will be replaced by a “See More” link. It is recommended that you follow this link to confirm that the Folder- and File-level metadata was successfully created.

3.b.iii Archivemata integration and Orphan folders

If an Archivemata integration has been successfully configured, each new Archivemata ingest should generate a DIP, which is then accessible to SCOPE. Each DIP creates one Folder, which should be automatically linked to the correct Collection using the dc.terms:isPartOf field or dc.terms:relation field in the DIP’s METS file.

If the dc:Related field is empty or if SCOPE does not recognize the identifier present in that field, the folder will be sent to the Orphan folder tab.



Screenshot of drop-down menu

If files are sent to Orphan folders, the individual files are available via the cross-collection search; however, the Folder itself will not be browsable until it is added to a Collection.

If an Orphan folder is to be associated with a particular Collection, first ensure that the Collection has been created. Then go to Orphan folders and click “See more” for the Folder. Then click “Edit” and update the Collection field to the correct Collection identifier. This will launch a background process resulting in the Folder being correctly associated with its Collection, and all related metadata will be updated to reflect that.

3.b.iv Editing Collections and Folders

To edit a Collection or Folder, navigate to that Collection or Folder’s page. Find the “Edit” button on that page and click.

Collection description

Identifier: AP022

Title: Arthur Erickson fonds

Creator: Arthur Erickson

Description: The fonds documents the work and activities of architect Arthur Erickson from 1947-2002 (predominantly circa 1963 - 2000). The records are concerned primarily with the buildings and projects of Erickson / Massey Architects (1963-1972), Arthur Erickson Architects (1972-1991), and to the work of Arthur Erickson as a design consultant from 1991 and after.

Date: 1947 - 2002

Format: See finding aid for related physical material.

Language: English

Finding aid: <https://www.cca.qc.ca/en/archives/108951/arthur-erickson-fonds>

Edit

Screenshot of "Edit" location for Collections

Folder description

Identifier: ARCH280463

Title: Sections of the provincial government building, Thunder Bay, Ontario, 5.25" floppy disk, 360 KB

Creator: Arthur Erickson

Description: Labelled: "Thunder Bay (Struct); Sections 109 F10 27/7/88". File format: AutoCAD Drawing.

Date: 1988

Format: 5.25" floppy disk (360 KB)

Edit

Attachments

Digital files: ARCH280463-23905dab-32f2-49cc-b52b-fd787c31c45a.tar

By clicking on the button below you'll download all the digital files included in this folder.

Download DIP

Screenshot of "Edit" location for Folders

Edit the metadata as needed, and click “Submit” to save.

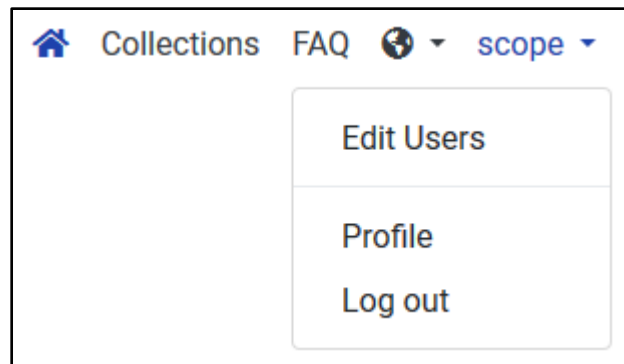
Note that Files cannot be edited because all their metadata is imported from the METS file. Only administrators can delete folders.

3.c Managers

Managers create and manage user accounts.

3.c.i Adding users

To add a user, click on the drop-down menu underneath your username in the top-right corner of any page.



Screenshot of drop-down menu

Select “Edit Users.”

At the bottom of the screen click “Add new User.”

On the next screen, fill out the user’s username, first and last names, and email address in the appropriate fields.

Select “Active” if it is an active user. (This box is checked by default.) Inactive users will not have access to their account. Note that Managers without administrative permissions cannot create Administrators. Only Administrators can create other Administrators. The “Administrator” box will be greyed out as an option for all non-administrative Managers.

Select the user groups that the user should be in, based on how they will use SCOPE. Use Ctrl+click to select multiple groups or unselect.

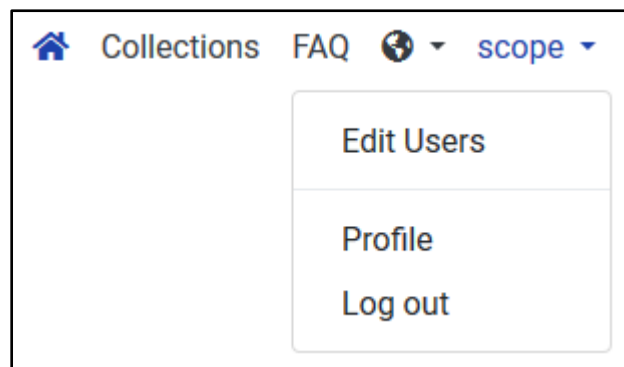
Enter a password for the user, and enter it again to confirm. The password must be at least 8 characters and cannot be entirely numeric. It also cannot be a commonly used password (e.g. “password”) or too close to the user’s personal information.

Click “Submit” to save.

Note that the user will not receive an email regarding their new account, meaning that their new login information needs to be sent to them directly. Additionally, users who are not Managers cannot change their own password, meaning that Managers should create a strong, unique password for users’ accounts.

3.c.ii Editing and deactivating users

To edit a user, click on the drop-down menu underneath your username in the top-right corner of any page.



Screenshot of drop-down menu

Find the user you would like to edit from the list or using the search bar. Click the “See more” button next to their name.

On the next page, make the needed changes. To deactivate a user, deselect the “Active” button. Users accounts cannot be deleted, but deactivation prevents them from accessing their account.

Click “Submit” to save changes.

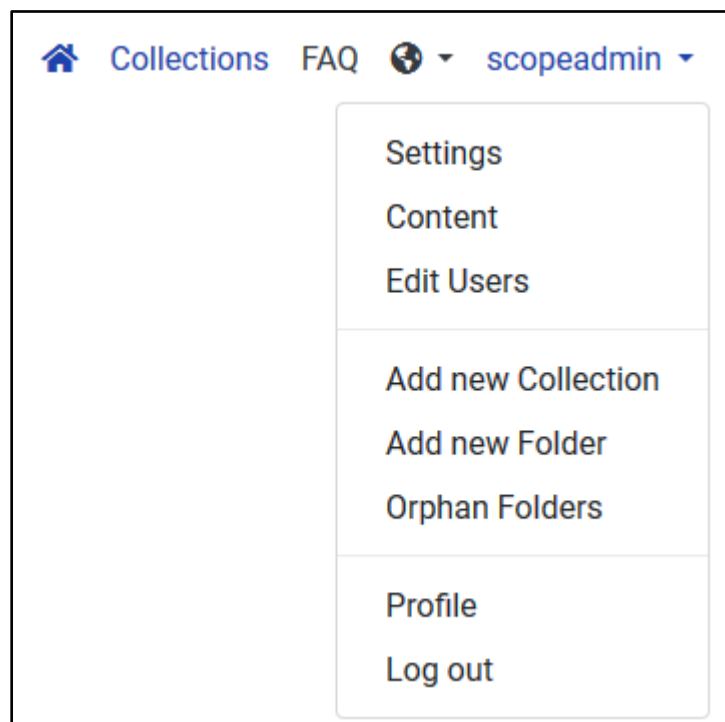
3.d Administrators

Administrators set global preferences for Dublin Core, create other Administrators, and delete Collections and Folders. Additionally, they have all the privileges of Editors and Managers. See sections 3.b and 3.c for more detail.

3.d.i Setting global preferences for Dublin Core

Administrators can decide which Dublin Core elements will display to Editors during data entry.

To set global preferences for Dublin Core, click on the drop-down menu underneath your username in the top-right corner of any page.



Screenshot of drop-down menu

Select "Settings."

On the next page, select the Dublin Core fields that should be used. To select multiple fields or to deselect, use Control+click.

Administrators also have the option to select the "Hide empty fields" button. This prevents the header from displaying in any fields with no data entered in them.

Click "Submit" to save changes.

3.d.ii Adding other Administrators

Administrators, like Managers, can add new users. However, Administrators are the only users that can add other Administrators. To do so, follow the instructions in section 3.c.i "Adding new users" and select the "Administrator" checkbox.

3.d.iii Deleting Collections and Folders

Administrators, like Editors, can add new Collections and Folders. However, Administrators are the only users that can delete them. To do so, navigate to the Folder or Collection that is to be deleted. Find the "Delete" button in the center of the screen.

Collection description

Identifier: AP022

Title: Arthur Erickson fonds

Creator: Arthur Erickson

Description: The fonds documents the work and activities of architect Arthur Erickson from 1947-2002 (predominantly circa 1963 - 2000). The records are concerned primarily with the buildings and projects of Erickson / Massey Architects (1963-1972), Arthur Erickson Architects (1972-1991), and to the work of Arthur Erickson as a design consultant from 1991 and after.

Date: 1947 - 2002

Format: See finding aid for related physical material.

Language: English

Finding aid: <https://www.cca.qc.ca/en/archives/108951/arthur-erickson-fonds>

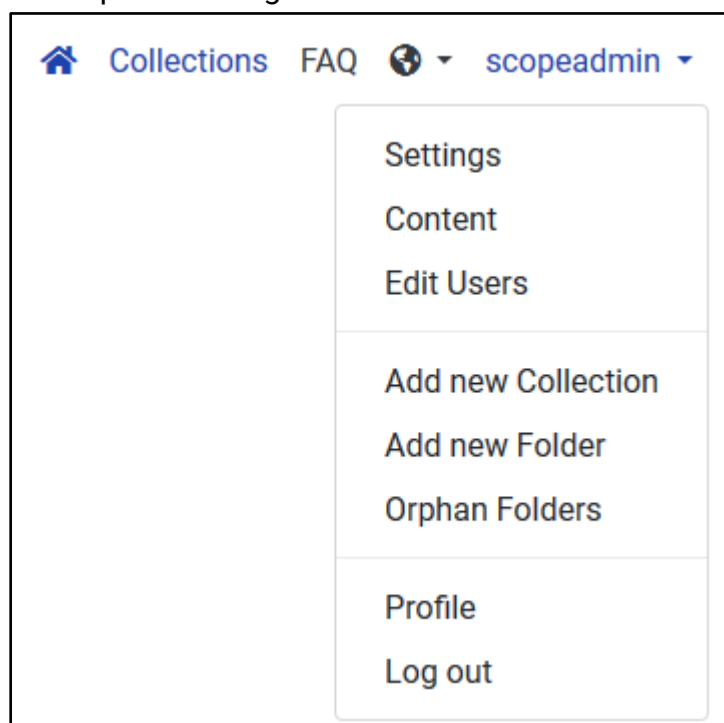
EditDelete

Screenshot of "Delete" location

On the next screen, enter the identifier of the Collection or Folder in the "Identifier" field. Click "Delete" again to confirm.

If Archivemata integration is configured, deleting a DIP from SCOPE will only delete the metadata associated with the DIP, and not delete the copy of the DIP in the Archivemata DIP store.

If Archivemata integration is configured and an AIP is reingested, the related DIP in SCOPE will not be refreshed. It is recommended to delete the DIP from SCOPE and the Archivemata DIP store prior to reingest.



Screenshot of drop-down menu

3.d.iv Creating and changing stock text

Stock text may be changed on the login page, the top of the home screen, and for the FAQ text. The Administrator can do so by clicking “Content” on the drop-down menu.

To change the text across the French and English interfaces, switch the language of the interface to the language you’d like to make changes to and update from this interface.

4 Conducting Research

In addition to giving direct access to DIPs, SCOPE was also designed to allow for more robust searching.

4a Changing the language

SCOPE is currently available in two languages: English and French. Change the language by clicking on the globe icon at the top of the screen and selecting the preferred language from the drop-down menu.



Screenshot of globe drop-down menu.

Note that only the interface is bilingual. The language of the database content will reflect the language in the METs file.

4b Searching with simple string syntax

SCOPE uses Elasticsearch, and using [simple string syntax](#) can be useful for searching. Special characters can be added to keyword searches to enable more specific searching. Simple string syntax includes:

Character	Operation	Notes
+	Boolean AND	
	Boolean OR	
-	Omits word	
" "	Wraps a phrase for exact searching	
*	Indicates a wildcard at the end of a phrase	
(and)	Signifies precedence	
~N (where N is a number)	Signifies edit distance/fuzziness of a word or a slop amount for a phrase	Recommended for keyword searching file names

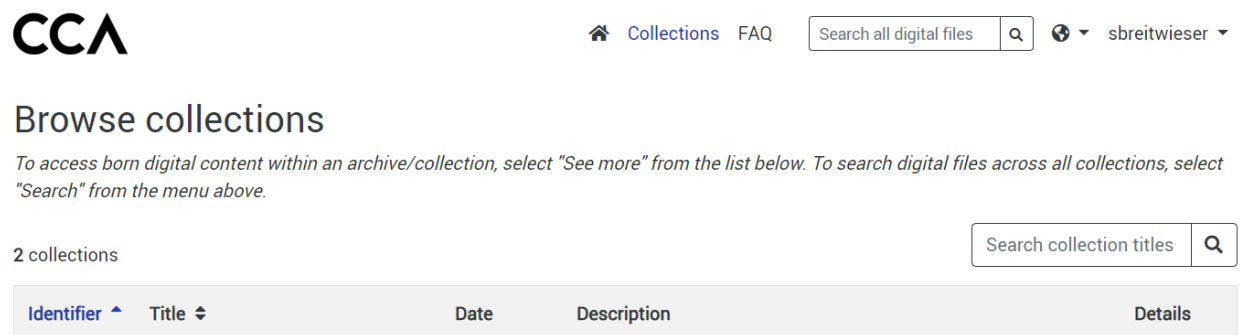
Special characters can be combined.

4c Collection-level

Collections can be browsed on the home page by scrolling down to “Browse our collections.”

Collections can also be browsed by selecting the “Collections” tab at the top of the page. From the “Collections” page, collection titles can be searched using the “Search collection titles” bar.

Click “See more” to access additional information about the Collection, as well as browse the list of available Folders within that Collection.



The screenshot shows the top of the CCA website. The header includes the CCA logo, navigation links for Home, Collections, and FAQ, a search bar for all digital files, a language selector set to German, and a user profile for sbreitwieser. Below the header is the 'Browse collections' section, which includes a sub-header with instructions on how to access digital content. A search bar for collection titles is present, showing '2 collections'. Below this is a table with columns for Identifier, Title, Date, Description, and Details.

CCA Home Collections FAQ Search all digital files Q 🌐 sbreitwieser ▼

Browse collections

To access born digital content within an archive/collection, select "See more" from the list below. To search digital files across all collections, select "Search" from the menu above.

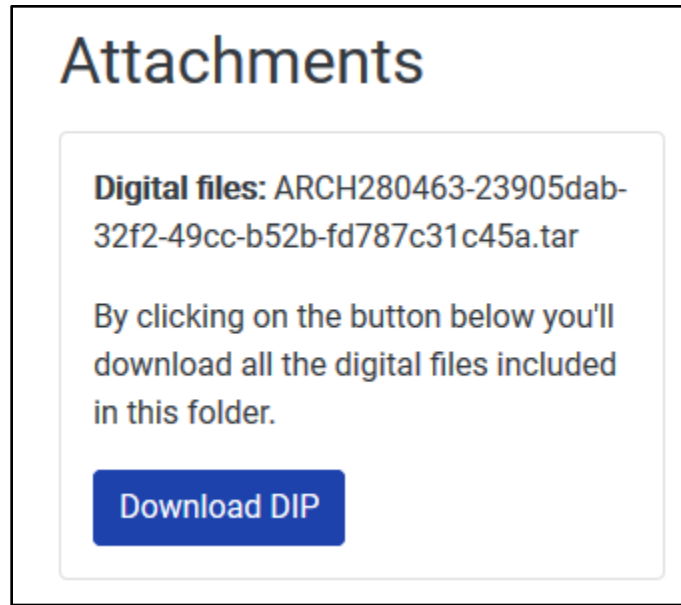
2 collections Search collection titles Q

Identifier ▲	Title ▼	Date	Description	Details
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4d Folder-level

Folders can be browsed within Collections. Navigate to the appropriate Collection following the instructions in 4.b, and select “See More” to view additional information about the collection as well as a list of available folders.

DIPS can be downloaded from Folder pages by clicking the “Download zip file” button.

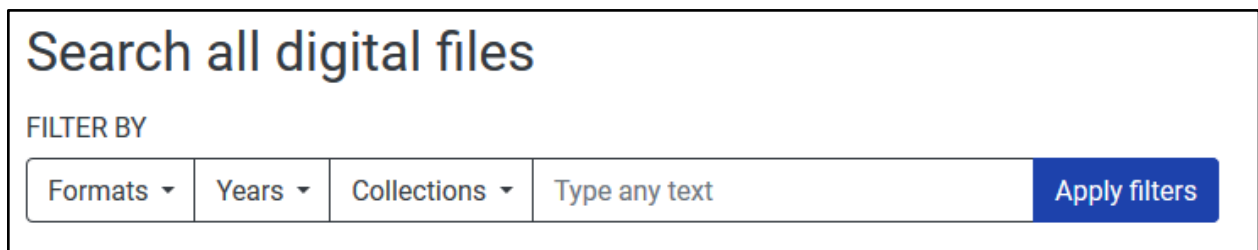


Screenshot of "Download zip file" button location

4e File-level

SCOPE can search at the file-level, meaning that every digital object represented in a DIP's METS file is discoverable.

Files can be searched from across all Collections using the "Search all digital files" bar at the top of the page. This same filtering works within Folders. (See section 4b Searching with simple string syntax for guidance on keyword searching.) In addition to keyword searching, files can be filtered by format, by year, and for cross-collection searching, by particular collections. Files can also be browsed by navigating to any Folder page.



Screenshot of filtering functionality

Clicking the "See more" button next to the file brings a researcher to the File page. This page displays additional metadata assigned by Archivematica, including the file format, file size, and last modified date.

By clicking on the “Preservation metadata” drop-down menu, a researcher can also access each of the PREMIS events logged in the METS file.

DIPS can be downloaded from File pages by clicking the “Download zip file” button. Note that this downloads the entire DIP, not the individual file. Downloading individual files is not possible in SCOPE at this time.