

Listings and Reports 2.9+ Admin Documentation

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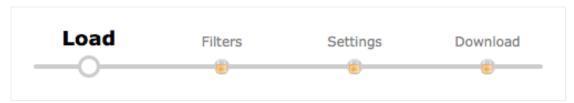
This document is aimed at DSpace administrators and describes how to configure and use @mire's Listings and Reports module.

Introduction

The Listings and Reports module is a tool to generate bibliographies, reports, and other types of Item lists. The items can be sorted, grouped, and styled, and the resulting document can be exported in a variety of formats.

To use the Listings and Reports module click the link marked Listings and Reports in the DSpace navigation. If you're using the XMLUI the module will open in a new window.

At the top of every Listings and Reports page there's a bar you can use to navigate to the different steps. These steps are Load, Filters, Settings and Download and they are explained in more detail in the following sections. Steps that aren't accessible from the current step have a padlock over them and can't be clicked.



The progress bar on the Load page

Load

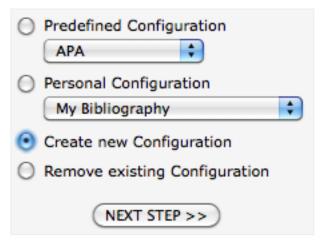
All settings in the Listings & Reports module can be saved in a 'configuration'. The load step allows you to use these saved configurations. Every user can save 'Personal Configurations' that are only accessible to them. Administrators can also make 'Predefined Configurations' that are accessible to every user of the listings & Reports module.

A saved configuration can be used for example by authors who need an updated version of their bibliography frequently. They can configure it once, save the configuration and then load it at a later time to have their latest publications automatically included in the document.

If you select a predefined or a personal configuration and click the 'next step' button you'll go directly to the download step. You'll still have the ability to go back to the filter or settings steps to modify the saved configurations.

If you select 'Remove existing Configuration' and click 'next step' you'll be taken to a page where you can select a configuration to delete. Only administrators can delete predefined configuration.

When there are no personal or predefined configurations in your repository the load step will be skipped and the filter step will be first.



The Load Page

Filters

The filter step lets you determine the list of Items you want to include as citations in your document. Before any filters are applied all Items in the repository are included, and the filters are used to narrow down that list. You have to use at least one filter, because including citations for all Items in the repository in your document could take a very long time.

Each filter is represented by a row in the interface. Filters have a type, a few settings depending on that type, and a green plus and a red minus button. Clicking the plus button will add a new filter, the minus button will remove the current filter. Three filter types are always available:

- **Timespan**: If you only want items published within a certain period you can use a timespan filter specify that period. e.g. If you set the *From* drop-down to 2004 and the *Until* drop-down to 2008 you'll only keep Items that where published between 2004 and 2008.
- Contributor: If you want items that have a certain person as a contributor (i.e. author, editor, ...) you can use the contributor filter. If you select this filter you'll see a text-box where you can enter the name of a contributor, and a plus button. If you press the plus button, it will add another text-box (to add another contributor name) and turn in to a minus button that, when clicked, will remove the current name from the filter. e.g. to only include Items that have 'Miguel Fernandez' or 'M. Fernandez' in a contributor field type 'Miguel Fernandez' in the text-box, click the plus button and type 'M. Fernandez' in the second text-box.
- Communities & Collections: Use this filter to only include Items that are part of a certain Community or Collection. If you select it you'll see all top level Communities with a radio button in front of each one. Click on a Community name to see the Communities and Collections within it. Select the radio button of the Community or Collection you want to filter on.

There can be other filter types but they are dependent on your configuration. They can be specified in the file <code>config/modules/atmire-listings-and-reports.cfg</code>. These filters will have a list of values with checkboxes, allowing you to select more than one at a time. For example if you have specified a filter on publication type, the list would include things like 'article', 'book', and 'conference papers'. You could then select 'article' and 'book' to only have citations for Items that have a publication type of 'article' or 'book'. More information on how to configure these extra filters can be found in the configuration section of this manual.



Filter on publication date and Collection

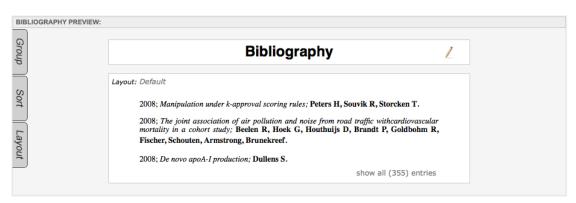
If you've configured the filters click the 'next step' button on the bottom of the page to go to the settings step. There you'll see a list of all Items that matched your filter settings. If that list includes too many or too few items you can always come back and adjust your filters using the bar at the top of the page.

Settings

The settings page gives you an overview of the document you're creating. If you created a new configuration the page will contain two white boxes. The top one contains the title of the Document. If you click on it, a text-box will appear and you can change it.

The bottom one contains a citation for all items that match the settings you made in the Filters step. Only the first few are shown by default. Click show all entries in the bottom right of that box to see them all. You can exclude a citation from the final document by clicking on it. Excluded citations are grayed out. If you click on it again it will be included again. You can exclude or include consecutive citations by clicking on the first, then holding down the shift button and clicking on the last one.

On the left edge of the screen are three tabs: Group, Sort and Layout.



The Settings Page

Grouping

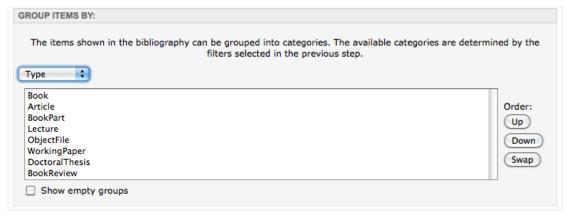
Using the Group tab you can divide the items in separate groups. A group is shown as a separate section in the document with its own title and its own style. Two options that are always available are:

- No groups: Don't use groups. This is the default option.
- Year: Group by year of publication.

Other options are dependent on your configuration. You can group by any of the filter types that are also configured as group types in the file <code>config/modules/atmire-listings-and-reports.cfg</code>. A common example is grouping by publication type: This will make a separate group for 'Articles', 'Books', 'Lectures', ... More information on how to configure these custom group types can be found in the configuration section of this manual.

If you choose a group type, you'll see a list of all possible values for that type. The order the values have in this list will be the order in which their groups will be shown in the document. If you select one of those values you can move it up or down using the buttons on the right side of the list. If you select one and then hold the ctrl key (cmd on a mac) and click another one, you should have two selected, and you can use the swap button to switch their places.

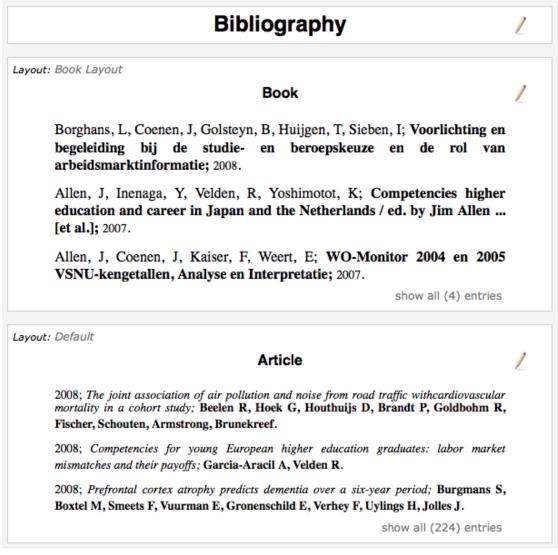
Under the list is a check box labeled 'Show empty groups'. If it's not checked, groups will only be shown in the document if there are Items in your selection that are part of them. If you check it, all groups will be shown regardless of whether or not they have Items in them.



Group by publication type

Click the Update button to apply any changes you've made, or Cancel to go back.

After you've grouped the Items the settings page will have a box for each group. In the center at the top of each box is the group title. You can click it to change it.

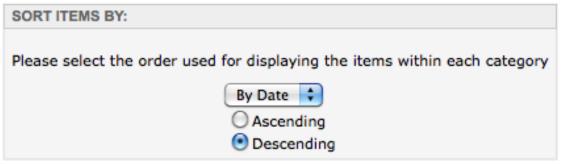


The settings page grouped by publication type

Sorting

With the Sort tab you can configure how Items will be sorted within their group. There's a drop-down list to choose the field you want base the sort on. Underneath it you can select the sort order. The fields in the drop down are all configurable. Common fields used here are 'date', 'title' and 'author'. More information on configuring sort fields can be found in the configuration section of this manual.

Click the Update button to apply any changes you've made, or Cancel to go back



The Sort Tab

Style

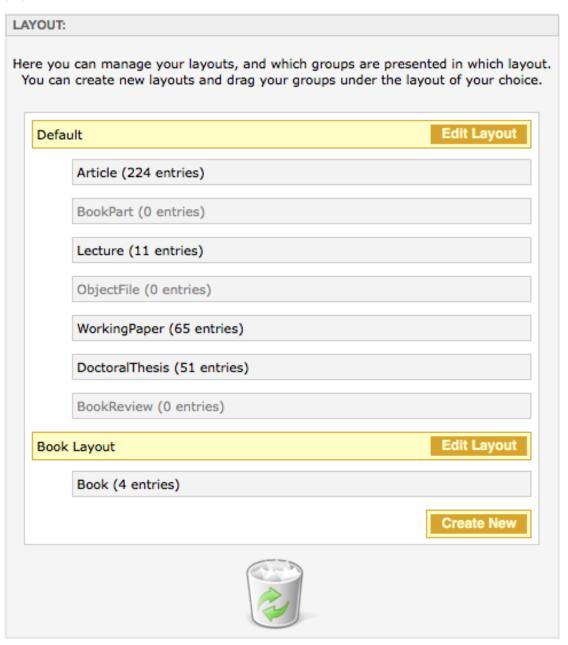
In the top left corner of each group box on the settings page there's a link to the layout style used for the group. If you click the link you'll open that style in the layout editor. To associate a different style with a group use the layout tab.

The Layout Tab

In the Layout tab you can set the style for your groups. By default it will contain one layout style named '*Default*' indicated by a yellow bar, and all groups are represented by gray bars under it. If you don't use any groups there will just be a single gray bar named '*Default group*'. You can create new layout styles by clicking the orange '*Create New*' button in the bottom right of the list.

Once you have more than one style you can apply a style to a group by dragging the group's gray bar under the bar of the style you want it to have. Drag a style to the trash can at the bottom to remove it. You can recover styles from the trash by clicking the trash can to show its contents, and then dragging the style back up to the list above. If you press Update or leave the Settings page, the trash can will emptied.

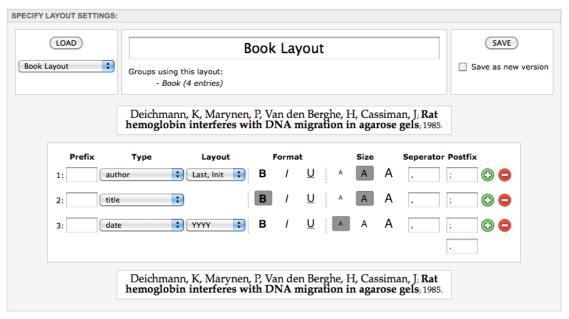
To adjust a style click the 'Edit Layout' button in its bar. Note that this will also cause you to leave the settings page, thereby emptying the trash.



The Layout Tab

The Layout Editor

With the layout editor you can create and modify layout styles for your document. In the top center there's a big text-box containing the name for the current layout style. Underneath there's a preview of the style on an example citation. The same preview is also shown at the bottom of the editor. The content of this example can be configured in the file <code>config/modules/atmirelistings-and-reports.cfg</code>. For more information see the configuration section of this manual.



The Layout Editor

Between the two previews is the table where the styles are composed. The rows represent the different parts of the citation, in the order they'll appear. The defining part of each row is the drop-down under the heading "Type". With it you can select what the content of this part of the citation should be. Examples are 'date', 'title' or 'author'. The different types you can select here can be configured in atmire-listings-and-reports.cfg. The other settings in a row are:

- **Prefix**: If you type something here it will be shown first in this part of the citation. e.g. type '[' here to start this part of the citation with a square bracket.
- Format: Only relevant for date and name fields. It allows you to select how you want these fields to be formatted. A few examples:
 - ° Date: If the date is '5 mar. 1998' you can choose to show just '1998' or '1998-03'
 - ° Name: If a name is 'Harold Meyers' you can show it as 'Meyers, Harold' or 'H. Meyers' among others
- Layout: The **B** button will make the text **bold**, the *I* will put it in *italics* and the \underline{U} button will <u>underline</u> the text.
- Size: These 3 buttons let you choose the font-size for this part of the citation.
- **Separator**: If you type something here it will be shown between instances of the field you selected in the *Type* column. e.g. If *Type* is keyword and you put a ',' in the *Separator* text-box, then, if an Item has more then one keyword they will be separated by a comma in the citation.
- **Postfix**: If you type something here it will be shown last in this part of the citation. e.g. if you typed '[' in the *Prefix* field you could type '];' here to close the brackets and put a semicolon after this part of the citation.

If you change a setting in the editor the affected part of the citation will be briefly highlighted in yellow in both preview windows. Each row has a green plus and a red minus button at the end. The minus button will remove the row, and the corresponding part of the citation, the plus button will add a new row (and a new part of the citation) after the current one.

There's an extra *Postfix* field under all rows that represents the postfix for the entire citation, you could for example put a '.' here if you want the citation to end with a full stop.

In the top right corner there's a 'Save' button to save your changes to the current style. Underneath it is a checkbox that allows you to save it as a copy. If you check it, a text-box will slide down with a proposed name for the copy. Change it if you like, but note that every layout style needs a unique name.

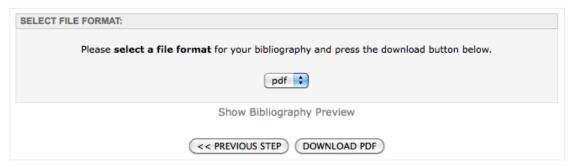
In the top left corner is a 'Load' button with a drop-down list under it. The list contains all styles in your document. Select a style and click the 'Load' button to edit that style.

Download

In the download step you can download the completed document in one of the following formats:

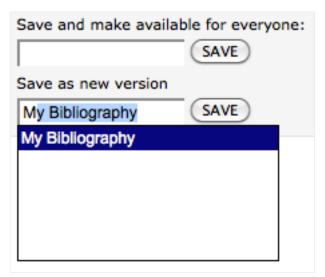
- pdf: Adobe's Portable Document Format.
- ps: PostScript
- txt: A standard text file
- rtf: Rich Text Format

Select the format of your choice from the drop-down list and click the download button to download the document in that format. If you'd like to see a preview first you can click the 'Show Bibliography Preview' link to see how the document will look.



The file format section

You can save the current configuration by typing a name in the text-box labeled: 'Save as new version' and pressing the Save button. That will make it available as a personal configuration in the load step. As an administrator you can also save it as a predefined configuration by typing a name in the text-box labeled: 'Save and make available for everyone'. This will make it available to any user in the load step. If you already have saved configurations (either predefined or personal) you'll see their names in a drop-down list when you type in one of the saved text-boxes. Select one of them, and click 'Save' to overwrite it.



The save section

Configuration

The Listings & Reports Module can be configured in the file <code>config/modules/atmire-listings-and-reports.cfg</code>. It can contain the following parameters:

- dspace.contexpath.jspui If your DSpace uses XMLUI the path to the JSPUI should be specified here.
- plugin.single.org.infoCon.ConverterPlugin The plugin used to convert documents using InfoCon.
- listingsandreports.converter.fop The path to fop. Only needed if you're not using InfoCon

• listingsandreports.converter.xsl

The path to the docbook to fo conversion stylesheet. Only needed if you're not using InfoCon

• listingandreports.permissions.group

The identifier for the DSpace group that has permission to use the Listings & Reports Module. This parameter is optional, if it isn't specified everybody has access.

export.maxresults

The max number of items in a report. It defaults to 500.

• biblio.filtertype.[number] = [id], [kind], [il8n key], [metadata field], [useAsGroupType], [discovery field]

Specify a new type to use in the filter step. The parameters are:

- **number**: These should be consecutive integers for the filtertypes specified here. The first should be biblio.filtertype.1, the second biblio.filtertype.2 and so on.
- id: for an input filter, this can be anything you like, as long as it's unique among the filters, and doesn't contain any spaces or special characters. For a valuepairs filter this should be the value-pairs-name attribute of the set of value-pairs you want to use.
- * kind: This can be either input, valuepairs or query. If it's input the user can type a string to filter on. if it's valuepairs the filter will make use of value-pairs defined in the file config/input-forms.xml. These will be shown as a list of checkboxes in the UI. If it's query the input is treated as discovery search input.
- $^{\circ}$ il8n key: the propertykey in the file Messages.propeties of the label for this filter.
- ° metadata field name: The Metadata field you want to filter on. e.g. dc.language.iso or dc.type.
- useAsGroupType: Can the categories for this filter also be used to group Items? Should be true or false. Can
 only be true for valuepairs filters.
- o discovery field: The discovery field you want to filter on. e.g. subject or dc.type. For example:

```
biblio.filtertype.1 = semantics_types, valuepairs,
jsp.export.filter-categories.type, dc.type, true, dc.type
```

This line specifies that the first filter uses the set of value-pairs that have 'semantics_types' as value-pairs-name attribute in input-forms.xml the label for the filter is specified by the property-key jsp.export.filter-categories.type in Messages.properties. It will filter on the dc.type field, and its value-pairs can also be used to group items in the settings step.

• biblio.ordertype.[number] = [id], [i18n key], [metadata field]

Specify a new sort type to use in the settings step. The parameters are:

- number: These should be consecutive integers for the sort types specified here. The first should be biblio.ordertype.1, the second biblio.ordertype.2 and so on.
- id: an id for internal use. Make sure it is unique among the order types and does not contain any spaces or special characters.
- ° **i18n key**: the propertykey in the file Messages.propeties of the label for this sort type.
- o metadata field: The metadata field you want to sort on. e.g. dc.date.issued or dc.title For example:

```
biblio.ordertype.3 = author, jsp.search.advanced.type.author,
dc.contributor.author
```

This line specifies that the third sort type will sort on the field dc.contributor.author, it will use the id author and its label is specified by the property-key jsp.search.advanced.type.author in Messages.properties.

• biblio.layout.metadata.[number] = [metadata field]

Specify a metadata field that can be used as part of a citation. The parameters are:

- o number: These should be consecutive integers for the metadata fields specified here. The first should be biblio.layout.metadata.1, the second biblio.layout.metadata.2 and so on.
- metadata field: The metadata field you want to make available as part of a citation.
 dc.publisher.location or dc.subject

```
• biblio.layout.name.[number] = [label]
```

Specify a label for the metadata field specified in biblio.layout.metadata.[number]. The parameters are:

- $^{\circ}$ number: This should be the same integer as the <code>biblio.layout.metadata</code> field this is a label for.
- ° label: The label to be used in the layout editor for the corresponding metadata field.

For example:

```
biblio.layout.metadata.9=dc.publisher.location
```

biblio.layout.name.9=location

These 2 lines specify that the ninth option for a metadata field in a citation is the field dc.publisher.location and it will have the label 'location' in the layout editor

• biblio.layout.type.readval.[number1] = [kind] biblio.layout.type.[number1].[number2] = [value]

Optionally specify how the metadata field specified in biblio.layout.metadata.[number] can be formatted. The parameters are:

- number1: This should be the same integer as the biblio.layout.metadata field this is a format for.
- ° kind: The kind of formatting the field needs. This can be date or name.
- o number2: These should be consecutive integers for the formats specified here. The first should be biblio.layout.type.[number1].1, the second biblio.layout.type.[number1].2 and so on.
- value: The value to be used in the layout editor to format the corresponding metadata field. For example

1:

```
biblio.layout.metadata.1=dc.date.issued
biblio.layout.type.readval.1=date
biblio.layout.type.1.1=YYYY
biblio.layout.type.1.2=YYYY-MM
```

These lines specify that for the field do.date.issued a user has the option to format it in a citation as a year in four digits (e.g. 1999) or as a year a dash and a month in two digits (e.g. 2004-06)

```
biblio.layout.metadata.3=dc.contributor.author
biblio.layout.type.readval.3=name
biblio.layout.type.3.1=Last, First
biblio.layout.type.3.2=Last, Init.
```

These lines specify that for the field dc.contributor.author a user has the option to format a name in the citation as 'last name, first name' (e.g. 'Deichmann, Klaus') as 'last name, first initial' (e.g. 'Deichmann, K.')

- biblio.layout.type.value.[number1].[number2] = [value] Specify a value to show in the citation preview boxes of the layout editor for the metadata field specified in biblio.layout.metadata.[number]. The parameters are:
 - onumber 1: This should be the same integer as the biblio.layout.metadata field this is a preview value for.
 - number2: This should be the same integer as the biblio.layout.type.[number1] type this is a preview value for. This number (and the preceding '.') should only be used for metadata fields that have multiple layout
 - value: The value to be shown in the citation previews of the layout editor

For example, if the configuration for the fields looks like this:

```
biblio.layout.metadata.1=dc.date.issued
biblio.layout.type.readval.1=date
biblio.layout.type.1.1=YYYY
biblio.layout.type.1.2=YYYY-MM
biblio.layout.metadata.2=dc.title
biblio.layout.metadata.3=dc.contributor.author
biblio.layout.type.readval.3=name
biblio.layout.type.3.1=Last, First
biblio.layout.type.3.2=Last, Init.
biblio.layout.metadata.4=dc.publisher
The corresponding preview configuration could look like this
biblio.layout.type.value.1.1=1985
biblio.layout.type.value.1.2=1985-09
biblio.layout.type.value.2=Rat hemoglobin interferes with DNA migration in
agarose gels
biblio.layout.type.value.3.1='Deichmann, Klaus', 'Marynen, Peter', 'Van den
Berghe, Herman'
biblio.layout.type.value.3.2='Deichmann, K.', 'Marynen, P.', 'Van den
Berghe, H.'
biblio.layout.type.value.8=Publisher\\'s name
```

Where the first 2 lines are the example dates in both available formats, the third line is an example title, the next 2 lines are example authors in both formats, and the last line is the publisher (the single quote has to be escaped using a double backslash).

Browser Support

The table below shows the browser support for this module

- Browsers that aren't listed are **unsupported**.
- In any browser JavaScript must be enabled for the module to work.

Windows	OS X	Linux

Modules - Listings and Reports 2.9+ Admin Documentation

Chrome	Recommended	Recommended	Supported
Firefox	Recommended	Recommended	Supported
Safari	Supported	Supported	n/a
Opera	Supported	Supported	Supported
Internet Explorer 10.x	Recommended	n/a	n/a
Internet Explorer 9.x	Recommended	n/a	n/a
Internet Explorer 8.x	Supported	n/a	n/a
Internet Explorer 7.x	Unsupported	n/a	n/a

Recommended	The module has been tested and works in this browser
Supported	The module should work in this browser
Unsupported	The module probably won't behave as it should in this browser.