

# Zone1 User Documentation

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## Search

Zone 1 provides basic keyword search entered in the text box in the left search column. This keyword search performs a search on the following fields:

- Author
- Contributor Name
- Copyright Holder
- Office
- Display Name
- Original Filename
- Description
- License Name

In addition to keyword search, files may be filtered by tag, entered in the Tags text box in the left column.

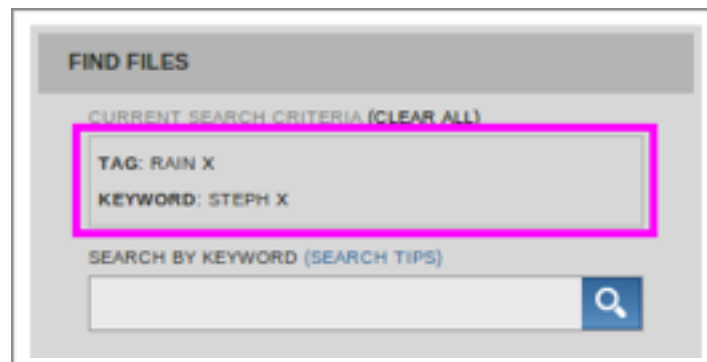
Files may be filtered by upload date and original document date. In both cases, a start and end date may be entered to specify a range, or a start or end date only for an open-ended range.

Files may be filtered by the creator, contributor, or copyright holder and may be entered in the text box under the “PEOPLE” tab.

Files may also be filtered by several file attributes, including:

- Collection Name
- Batch Number
- Flags (nominated for preservation, selected for preservation, preserved, may be university record, and university record)
- File Type (hierarchy of options)
- License Type
- Incomplete File Metadata Status

In all cases, once a search filter is applied, it may be removed independently from other filters that are applied on the current search, by clicking on the “X” in the box above the keyword search, as shown in the following image:



The image shows a search interface titled "FIND FILES". Under the heading "CURRENT SEARCH CRITERIA (CLEAR ALL)", there are two criteria listed: "TAG: RAIN X" and "KEYWORD: STEPH X". These two criteria are enclosed in a pink rectangular box. Below this section, there is a "SEARCH BY KEYWORD (SEARCH TIPS)" section, which includes a text input field and a blue search button with a magnifying glass icon.

## Search Listings

Files in the list view can be displayed in list or thumbnail view, as controlled by the option under the “DISPLAY OPTIONS” tab. The “DISPLAY OPTIONS” tab gives additional options to hide or show specific fields in the list view, as well as control the number of items per page. Thumbnails for JPEG, PNG, and GIF files will be available in all major browsers.

In addition to controlling display options, results may be sorted by name, date, author, file size, batch ID. Each sort option has a default order (descending or ascending), and the non-default option may be chosen by clicking on the arrow next to the sort option, as shown in the following screenshot:



After selecting several files in the search listings, the “SELECTED” tab provides the ability to perform several abilities on the selected files:

- Export to Dash (export to the Dash Repository)
- Download (bulk download)
- Full Edit (bulk edit the selected files)
- CSV Edit Export (export a CSV file containing metadata for all checked files, which can be edited and uploaded later to edit in bulk)
- Delete (bulk delete)

While on the search listings page, the name of the file can be clicked on, which will display several “quick” options for that file, including the ability to download, edit, link to, delete, or edit the flags, tags, or permissions of that file.

## Groups

Users can be invited to join a group and must accept the invitation to receive the benefits of the group.

A user that creates a group may assign file access to one or more files to a group they created. See “File Visibility” below for more information. The screenshot below shows an example of a group edit page for a standard user. Note that a standard user may not assign rights to a group.

Test Group

Name

Test Group

Members

Owner Remove

Steph

☒ ☐

Admin (Invited by you less than a minute ago.) (Re-send invite)

☐ ☐

Enter emails, one per line

UPDATE

DELETE

## File Visibility

File accessibility is controlled by several facets, described below.

The right to view all items can be assigned to a user directly by an admin, to a user through a role that user has, or to a user through a group that user belongs to. This permission is managed through the Zone1 admin interface.

Additionally, an owner of a file may mark it as “Partially Open” and may specify one or more groups of users that can view the file.

A file marked as “Dark” is only visible to the owner of the file and any user that has the right to view all items assigned to the user directly, to a role the user has, or to a group the user belongs to.

The path of logic for whether a file is visible to a user is:

- If a file is marked as “Open”, it is visible to all. Note that regular users may not mark files as “Open” unless they have been given this right.
- If a file is marked as “Partially Open”, it is visible to the owner, any users in any group that the owner has given access to view the file, and any users that have been assigned the right to view all items either directly, through a role they have, or through a group they belong to. If the file has a preserved flag, it is also visible to any users that have the right to view preserved flag content.
- If a file is marked as “Dark”, it is visible to the owner and any users that have been assigned the right to view all items either directly, through a role they have, or through a group they belong to. If the file has a preserved flag, it is also visible to any users that have the right to view preserved flag content.

## Flags

The system has five non-changing flags for which a file can have:

- nominated for preservation
- selected for preservation
- preserved
- may be university record
- university record

A standard user can assign only the “nominated for preservation” and “may be university record” flag to their items. The rights to add “selected for preservation”, “preserved”, and “university record” flags are managed via the admin interface and can be assigned to a user directly, through a role they have, or through a group they belong to.

Additionally, users with the right to view preserved flag content are allowed to access files with the “preserved” flag regardless of their permissions level.

## Comments

Each file has a boolean value controlling the ability to add comments on the file. If that value is true, a text box is shown under the option to enter a new comment, as shown in the screenshot below.



A screenshot of a user interface element. At the top, there is a checked checkbox followed by the text "Allow users to add comments". Below this, the text "New Comment:" is displayed. Underneath the text is a large, empty rectangular text input box with a small cursor icon at the bottom right corner.

Comments are then visible and deletable (by users with the right to delete comments or delete comments on owned items) from both the “edit” and “show” page for that file, as shown in the screenshots below.

 <p>A screenshot of the "edit" page for a file. It shows a checked checkbox "Allow users to add comments". Below it, three comments are listed, each with a delete icon (X) to its right: "Here is a comment! -Admin X", "Here is another comment! -Admin X", and "Here is a comment by another user. -Steph X". At the bottom, there is a "New Comment:" label and a large text input box.</p> <p>Comment ability on “edit” page for file.</p>	 <p>A screenshot of the "show" page for a file. It shows a checked checkbox "Allow users to add comments: Yes". Below it, the same three comments are listed with delete icons (X) to their right: "Here is a comment! -Admin X", "Here is another comment! -Admin X", and "Here is a comment by another user. -Steph X".</p> <p>Comment ability on “show” page for file.</p>
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On the bulk edit page (where you may edit properties of multiple files), the attribute for allowing comments on the set of files can be edited, but individual comments can not be added here, as shown in the screenshot below.

## File Upload & Metadata

**UPLOAD**

**Enter Common Attributes**

Title:

Creator:

Copyright holder:

Tag:

Collection:

License:

Description:

Original date:

Office:

☐ Allow users to add tags

☐ Allow users to add comments

Permissions:

Groups: ☐ Testing2

**Content Flags**

☐ Nominated for Preservation

☐ May be University Record

**Upload Files**

Filename	Status	Size
Drag your files here or click "Add Files"		

0% 0 kb

One or more files can be uploaded to Zone One using the File Upload tool accessible via the "Upload Files" link at the upper right corner of the screen. Only logged-in users may upload files to Zone One.

The top portion of the file upload screen is where users can enter optional metadata about the files they plan to upload. In Zone One, the more metadata supplied for a file, the easier it will be to find via the search feature. Therefore, it is ideal to supply as much metadata as possible when uploading. Naturally, users can always edit the metadata for one or more files after they have been uploaded, but adding the metadata at upload time is easier and more efficient. The bottom portion of the file upload screen is where users can queue up files for upload as well as enable the SFTP upload (described below) window. There are two ways to queue up files to upload; drag and drop them from your computer onto the upload box or click the upload box's "Add Files" button. Both methods produce the same end result.

Once a user has their files queued up and their metadata entered, they can click the "Start Upload" button and their files will begin uploading one at a time. The upload box will show the progress of each file as well as any errors. Each uploaded file will get its own copy of the metadata from the form on this page when the Start Upload button is clicked. This enables workflows like "entering metadata, uploading a file, modifying the metadata on that page slightly, then uploading another file all, all without leaving that page."



Behind the scenes, a “batch ID” is created every time the user visits the File Upload tool. Every file uploaded (via the upload box or SFTP) from that visit to the File Upload tool will get the same batch ID. This batch ID can be entered into the search interface to find all the files uploaded in that batch. The batch ID is not currently displayed on the File Upload page, but it is displayed in every file detail page.

If a user tries to upload a file that is larger than limit configured in Zone One, an error message will be displayed and the SFTP window will open next to the existing “Upload Files” window. The user can then choose to upload some or all of their files via SFTP. Files uploaded via SFTP get their metadata from the form on this page the same as files uploaded through the previously described upload box.

# Editing Multiple Files

## CSV Edit Import tool

To use the CSV Edit Import tool, you first need to export your files' CSV data. Search for and select the files you want to edit, and then open the "Selected" menu and click "CSV Edit Export". This will download a CSV file with your selected files' data, which you can then edit and upload back to Zone1 using the "CSV Edit Import" tool within your user menu.

## Bulk Edit tool

To use the Bulk Edit tool, search for and select the files you want to edit, and then open the "Selected" menu and click "Full Edit". Any changes you make (with the 'Mark for bulk edit' box selected) will be applied to each of the selected files. See the screenshot below for more info:

**EDIT**

**2 Files Selected**

Use the "Mark for bulk edit" checkbox to indicate which fields you want to update for all of the selected files. It will become highlighted when you check it or modify the value of its associated field.

The red highlight indicates that you've changed the associated field's value but haven't marked it for bulk edit, which means that particular change will *not* be applied when you click "Update".

Selecting the "Mark for bulk edit" checkbox will highlight it in green, signifying that your change *will* be applied once you click "Update".

**Selected files:** gill bridge turners falls.jpg, millers falls.jpg

**Contributor:**

<input checked="" type="checkbox"/> <b>Mark for bulk edit</b>	<input type="checkbox"/> Mark for bulk edit
<b>Title:</b> <input type="text" value="New_title_to_be_updated"/>	<b>Creator:</b> <input type="text"/>
<input type="checkbox"/> Mark for bulk edit	<input type="checkbox"/> Mark for bulk edit
<b>Tags:</b> <input type="text"/>	<b>Collections:</b> <input type="text"/>
<input type="checkbox"/> Mark for bulk edit	<input type="checkbox"/> Mark for bulk edit
<b>Description:</b> <input type="text" value="Images related to the area in and around Montague, MA"/>	<b>Original date:</b> <input type="text"/>
<input type="checkbox"/> Mark for bulk edit	<input type="checkbox"/> <b>Mark for bulk edit</b>
<input checked="" type="checkbox"/> <b>Allow users to add tags</b>	<b>Office:</b> <input type="text" value="This field has changed, but will not be updated"/>
<input type="checkbox"/> Mark for bulk edit	
<input checked="" type="checkbox"/> <b>Allow users to add comments</b>	

## Export to DASH

Files stored in Zone1 can be exported directly from Zone1 into the DASH repository without the user needing to download files to their computer. Single files can be exported via the “Export” button on their file detail or edit pages, while one or more files can be exported from the search results page by checking each file’s checkbox and then choosing the “Export To DASH” option under the “Selected” menu. Either technique will display the Export pop-up that will prompt the user for their DASH repository username and password as well as the DASH collection to which they wish to export their files. To refresh the list of collections, simply click the “refresh collections” link on that pop-up after entering your DASH username/password. Then, select the desired DASH collection from the list, and click “Export Now.” The user’s files will be exported to DASH behind the scenes.

## SFTP File Upload

The SFTP (Secure FTP) functionality built into the Zone1 web application allows users to upload files to Zone1 using SFTP rather than the Zone1 web upload interface. SFTP has a few advantages over the web upload interface: It supports larger files than the web upload, it can recursively upload an entire tree of directories and their files, and it can upload files that are not located on the user's local computer.

### Workflow

Once you're logged into Zone1, there are a few basic steps to uploading files to Zone1 using the SFTP feature:

#### Request a temporary SFTP login

- i. Click the "Upload Files" link at the top of the page
- ii. At the bottom right of the page, click the "Enable SFTP Upload Mode" button
- iii. Temporary SFTP login credentials will be created and displayed

#### Upload your files using an SFTP client program

- i. Using any number of freely available SFTP programs, use the previously mentioned login credentials displayed to log in and upload one or more files.

#### Tell Zone1 to fetch your files

- i. Once your files are finished uploading through your SFTP client program, switch back to the Zone1 interface that's still open in your web browser.
- ii. At this point, as with all uploads to Zone1, you have the option of supplying metadata about your files in the form at the top of the page.
- iii. Click the "Start Upload" button to the left of the SFTP login credentials box.
- iv. Zone1 will start importing your SFTP files behind the scenes.
- v. (Notice how in the example screenshot, I also have files queued to upload via the web upload interface. Zone1 can handle both types at the same time)
- vi. Once Zone1 is finished importing those SFTP files, it will delete them from the SFTP server where you uploaded them. It will also delete those temporary credentials.
- vii. At this point, your files have been imported into Zone1 and will behave just like files uploaded through the normal web upload interface. You're done!

Queued-up web upload files on the left, temporary SFTP credentials on the right

Filename	Status	Size
ruby-best-practices_1-6.pdf	0%	2 MB
couchdb-ref.pdf	0%	249 KB

2 files queued Start Upload 0% 2 MB

**SFTP Upload Instructions**

1. Login to the SFTP server with the account info below
2. Use SFTP to upload your large files or entire directories
3. Once you're done uploading through SFTP, click the "Start Upload" button to the left.
4. The files you uploaded via SFTP will be imported into Zone 1 in the background, and associated with the metadata you've entered on this page

Connect To: user@x-2024-02/01

Password: bcof00HcJ9/Hic

### SFTP Caveats

Once you've clicked Start Upload, and Zone1 has detected that you've uploaded one or more files to its SFTP server, it will take a snapshot of your files on its SFTP server and import them as part of this batch. (See section "File Upload & Metadata" for more details on batches.) It will only do this \*one\* time from this page. That means you'll want to make sure to upload all your SFTP upload files to the Zone1 SFTP server before you click that Start Upload button.

If you upload some of your files to the Zone1 SFTP server, then click the Start Upload button, then decide you want to upload more files to the Zone1 SFTP server, any files you add after clicking Start Upload will \*not\* get imported into Zone1. In that case, you would have to reload the File Upload page in your browser, re-enter your metadata, request new SFTP credentials and repeat the process of uploading your new files to the Zone1 SFTP server and clicking the Start Upload button.