

## Administrative Structure

### Configuring a Consortium

If your organization is using the consortial capabilities of Rosetta, your Administrator will set up the individual institutions and make any edits to the consortium properties. This work begins on the List of Institutions page. To access the page, from the Administration Home page, click **Advanced Configuration**, then the **Administrative Structure** heading. This opens the List of Institutions page.

Administrative Structure

**Consortium Information**

\* Code: CRS00      \* Name: Preservation Consortium

\* Description: Preservation Consortium

Updated By: admin1      Updated On: 24/08/2011

**Institution List**

Create New Institution ⚙️

Code	Name	Description	Updated On	Updated By		
1 DUE	Heinrich-Heine-Universität Düssel...	Heinrich-Heine-Universität Düssel...	12/02/2013	admin1	Edit	Delete
2 HARU	Harvard University	Harvard University - Demo	14/08/2013	admin1	Edit	Delete
3 INS00	Demo Institution	Demo Institution	23/01/2018	admin1	Edit	Delete
4 INS01	Ex Libris Institution	Ex Libris Institution	26/05/2020	admin1	Edit	Delete
5 INS07	INS07	INS07	01/02/2018	admin1	Edit	Delete
6 INS15	OBV Inst 1	OBV consortium - Institution 1	10/05/2020	admin1	Edit	Delete
7 NLROSETTA	SIM - Singapore Institute of Mana...	An institution for demo purposes	24/08/2016	admin1	Edit	Delete
8 RESEARCH001	Research Institution	Einstein's Research Institution	11/07/2012	admin1	Edit	Delete
9 TEST	National Geographic	National Geographic demo	14/03/2018	admin1	Edit	Delete
10 TP	Temasek Polytechnic	Temasek Polytechnic - Training	17/04/2014	admin1	Edit	Delete
11 TRAIN00	EU Training institution	TRAINING Institution for PS EU	26/05/2020	admin1	Edit	Delete
12 TRIAL00	Trial	this is a trial	19/12/2011	admin1	Edit	Delete

Back Save

#### List of Institutions for Consortium

The name and description fields of the consortium are editable and any institutions that have been added to the consortium are listed on the lower part of the page.

### Updating a Consortium

Administrators can change the properties of their existing consortium, such as changing the consortium's name and description.

#### To update a consortium:

1. From the Advanced Configuration home page, click **Advanced Configuration**, then the **Administrative Structure** heading. The List of Institutions page opens.
2. In the **Consortium information** pane, modify the fields that you want to update.
3. Click **Save**.

The updated consortium is saved in the Rosetta system.

# Configuring Institutions Within a Consortium

Administrators work with a consortium's institutions using the Institutions List page. The following actions can be performed on this page:

- [Viewing Institutions Within a Consortium](#)
- [Adding a New Institution](#)
- [Updating an Institution](#)
- [Configuring an Institution to Work With a Patron Directory Service](#)
- [Deleting an Institution](#)

## Viewing Institutions Within a Consortium

Administrators can view institutions within a consortium.

### To view institutions within a consortium:

1. Access the List of Institutions page from the Administrative Home page: click **Advanced Configuration > Administrative Structure**.
2. The List of Institutions page opens.

The screenshot shows the 'Administrative Structure' page. At the top, there is a breadcrumb trail: / Administrative Structure. Below this is a 'Consortium Information' section with a blue header. It contains fields for Code (CRS00), Name (Preservation Consortium), Description (Preservation Consortium), Updated By (admin1), and Updated On (24/08/2011). Below the consortium information is an 'Institution List' section with a blue header and a dropdown arrow. It features a 'Create New Institution' button and a table of institutions. The table has columns for Code, Name, Description, Updated On, Updated By, Edit, and Delete. The table contains 12 rows of institution data.

Code	Name	Description	Updated On	Updated By	Edit	Delete
1 DUE	Heinrich-Heine-Universität Düssel...	Heinrich-Heine-Universität Düssel...	12/02/2013	admin1	Edit	Delete
2 HARU	Harvard University	Harvard University - Demo	14/08/2013	admin1	Edit	Delete
3 INS00	Demo Institution	Demo Institution	23/01/2018	admin1	Edit	Delete
4 INS01	Ex Libris Institution	Ex Libris Institution	26/05/2020	admin1	Edit	Delete
5 INS07	INS07	INS07	01/02/2018	admin1	Edit	Delete
6 INS15	OBV Inst 1	OBV consortium - Institution 1	10/05/2020	admin1	Edit	Delete
7 NLR0SETTA	SIM - Singapore Institute of Mana...	An institution for demo purposes	24/08/2016	admin1	Edit	Delete
8 RESEARCH001	Research Institution	Einstein's Research Institution	11/07/2012	admin1	Edit	Delete
9 TEST	National Geographic	National Geographic demo	14/03/2018	admin1	Edit	Delete
10 TP	Temasek Polytechnic	Temasek Polytechnic - Training	17/04/2014	admin1	Edit	Delete
11 TRAIN00	EU Training institution	TRAINING Institution for PS EU	26/05/2020	admin1	Edit	Delete
12 TRIAL00	Trial	this is a trial	19/12/2011	admin1	Edit	Delete

### Institution List Page

## Adding a New Institution

Administrators can add a new institution to a consortium. New institutions copy the settings of the first institution configured for this consortium. Settings can be edited after the new institution has been saved.

### To add an institution:

1. Open the List of Institutions page by clicking **Advanced Configuration > Administrative Structure** from the Administration Home page.
2. Click the **Create new Institution** button. The institution information form opens.

Administrative Structure / Details

### Institution Information

\* Code  Base institution Demo Institution ▾

\* Name  Color and Logo Settings Alternative ▾

\* Description

Updated By - Creation date -

### Department List

Create New Department

No records were found

#### Institution Information Form/List of Departments

3. Enter information in the **Code**, **Name**, and **Description** fields.

#### Note

The code is any alphanumeric combination (but cannot start with a number) that has meaning within the context of your institution. It will also be used for identification purposes within the Rosetta system.

#### Note

Institution **Name** value is limited to 50 characters.

4. Select a **Base institution** from the drop-down list of existing institutions.

#### Note

The base institution determines default settings for institution-level items like metadata profiles, SIP processing rules, and SIP routing rules.

5. Click **Create New Department**.

#### Note

Every institution must create at least one department before it can be saved to the database and included as a member of the consortium.

A new department form opens in a light box over the page.

\*Code  \*Name

\*Description

Close Add

## New Department Form

6. Enter a **Code**, **Name**, and **Description** for the department and click **Add**.  
The department information displays on the Department List section of the List of Departments page.
7. Add as many departments as you need for your institution.
8. Click **Save**.

The new institution is displayed in the Institution List pane and is saved in the Rosetta system.

At the top of the list, Rosetta indicates your username and password for the new institution. This username and password is necessary to prevent your current user information from being shared with other institutions. To add users to your new institution, log out and log in again with the new username and password.

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## Updating an Institution

Administrators can change the properties of an existing institution, such as changing the institution's name and description, by updating it.

### To update an institution:

1. On the Institution List page (see [Viewing Institutions Within a Consortium](#)), in the **Institution List** pane, locate the institution with which you want to work and click **Edit**.  
The Department List page opens.

Institution Information						
* Code	INS01	* Name	Ex Libris Institution			
Color and Logo Settings	TIB Flavour					
* Description	Ex Libris Institution					
Updated By	admin1	Creation date	26/05/2020			
Department List						
Create New Department						
Code	Name	Description	Updated On	Updated By	Edit	Delete
1 DPR02	Second Department	Second department	17/06/2015	admin1	Edit	Delete
2 DPR01	Archive Department	Archive Department	14/03/2011	admin1	Edit	Delete
Back						
Save						

### Department List Page

2. In the **Institution Information** pane, modify the fields that you want to update.
3. Click **Save**.

The updated institution is saved in the Rosetta system.

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## Configuring an Institution to Work With a Patron Directory Service

In order for users to sign in to the new institution, the institution must be configured in the PDS as well as in Rosetta.

### To create a PDS-enabled institution:

1. On the Institution List page (see [Viewing Institutions Within a Consortium](#)), in the **Institution List** pane, locate the institution you want to configure for PDS and click the corresponding **PDS** text link. The Ex Libris PDS Configuration page opens.
2. Fill out the PDS Configuration form and click **Save & Continue** to move through the remaining configuration pages.

For information about Patron Directory Services and how to configure them, see the *Patron Directory Services Guide* in the Cross-Product section of the Ex Libris Documentation Center.

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## Deleting an Institution

Administrators can delete existing institutions as long as there are no IEs associated with the institution. An Administrator cannot delete an institution through which he or she is currently logged on.

**CAUTION:** Deleting an institution will cause the user to lose access to all objects that were deposited through this institution.

### To delete an institution:

1. On the Consortium Information page (see [Viewing Institutions Within a Consortium](#)), in the **Institution List** pane, locate the institution that you want to delete and click **Delete**. The confirmation page opens.
2. Click **OK**.

The institution is deleted from the Rosetta system.

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## Configuring Departments Within an Institution

Administrators can work with an institution's departments using the List of Departments page. The following actions can be performed on this page:

- [Viewing Departments Within an Institution](#)
- [Adding a New Department](#)
- [Updating a Department](#)
- [Deleting a Department](#)

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## Viewing Departments Within an Institution

Administrators can view departments within an institution.

### To view departments within an institution:

1. On the Consortium List page (see [Configuring a Consortium](#)), in the **Institution List** pane, locate the institution with which you want to work and click **Edit**. The Institution List page opens.
2. Locate the institution within which you want to view departments and click **Edit**. The Department List page opens.

**Institution Information**

\* Code      INS01      \* Name     

Color and Logo Settings     

\* Description     

Updated By      admin1      Creation date      26/05/2020

**Department List**

	Code	Name	Description	Updated On	Updated By		
1	DPR02	Second Department	Second department	17/06/2015	admin1	<a href="#">Edit</a>	<a href="#">Delete</a>
2	DPR01	Archive Department	Archive Department	14/03/2011	admin1	<a href="#">Edit</a>	<a href="#">Delete</a>

## Department List Page

## Adding a New Department

Administrators can add a new department to an institution.

### Note

There is no limit to the number of departments that can be added to an institution.

### Note

Department **Name** value is limited to 50 characters.

### To add a department:

1. On the Department List page (see [Viewing Departments Within an Institution](#)), click the **Create New Department** button.  
A blank department form opens in a light box over the page.

\*Code            \*Name     

\*Description

### New Department Form

2. Enter information for all three required fields.
3. Click **Add**.

The new department is displayed in the Department List pane and is saved in the Rosetta system.

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## Updating a Department

Administrators can change the properties of an existing department, such as changing the department's name and description, by updating it.

### To update a department:

1. On the Department List page (see [Viewing Departments Within an Institution](#)), in the **Department List** pane, locate the department you want to change and click **Edit**.  
The department information displays in a light box over the page.
2. Modify the fields that you want to update.
3. Click **Save**.

The updated department is saved in the Rosetta system.

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## Deleting a Department

Administrators can delete an existing department. However, Administrators cannot delete a department when the department's users (such as Producer Agents and staff users) are depositing, or have already deposited, content to the Rosetta system.

### To delete a department:

1. On the Institution Information page (see [Viewing Departments Within an Institution](#)), in the **Department List** pane, locate the department that you want to delete and click **Delete**. The confirmation page opens.
2. Click **OK**.

The department is deleted from the Rosetta system.

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## Remote Institution Monitoring

You can configure the consortium institution to view dashboard BIRT reports provided by another instance that is not part of your consortia.

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## Member Institution Configuration

Perform the following configurations for each member institution for which you want to view BIRT reports:

1. Set the `enable_remote_reports_user` parameter (Admin UI > General > General Parameters) to `true`.
2. Take the key from the `remote_access_key` parameter to enter in the consortium institution.
3. Click **Update**.

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## Consortium Institution Configuration

Perform the following configurations for the consortium institution:

1. Set the `remote_management` parameter (Admin UI > General > General Parameters) to `true`.

- Open the **Remote Instances for Reports** mapping table (Admin UI > General > Mapping Tables). The following appears:

The screenshot shows the 'Remote Instances for Reports' mapping table configuration page. At the top, it displays the sub-system as 'All' and the table name as 'Remote Instances for Reports'. Below this, there are fields for 'Updated by' (John Smith) and 'Updated on' (Thu Mar 15 16:46:29 IST 2018). The table description is 'Remote Instances for Reports'.

The 'Mapping Table Rows' section contains a table with the following data:

	Key	InstitutionCode	BaseURL	Description	Last Updated	
1	<input checked="" type="checkbox"/>	Fp2sCcsRDbnNWLSPMjtjYmtxkylC	INS00	https://rosetta.exlibrisgroup.com	Demo - INS00	ByJohn Smith <a href="#">Delete</a>
2	<input checked="" type="checkbox"/>	Fp2sCcsRDbnNWLSPMjtjYmtxkylC	CRS00	https://rosetta.exlibrisgroup.com	Demo - CRS00	ByJohn Smith <a href="#">Delete</a>

Below the table is a 'Create a New Mapping Row' form with input fields for 'Key', 'InstitutionCode', 'BaseURL', and 'Description', and a 'Create' button. At the bottom right, there are 'Cancel' and 'Save' buttons.

### Remote Instances for Reports

- For each member institution for which you want to view BIRT reports, enter the key, institution code, base URL, and description.
- Click **Save**.  
A drop-down list appears that allows you to display the BIRT reports provided by another instance that is not part of your consortia:

The screenshot shows the BIRT reports interface. A dropdown menu is open, showing the following options:

- Local Instance
- il-dtldev06a - DUE
- il-dtldev06a - INS00

The main interface is divided into three columns:

- Local Instance:** Shows a table with 'Status' and 'SIPs' columns. 'Rejected' has 2, 'Total' has 2. Below is a bar chart titled 'Deposits Per Producer Group' showing a bar for 'DUE Producer Group' with a value of 2.
- Submissions:** Shows 'Quick Stats' for 'SIPs In Process' (0) and 'In process' (0). It also has sections for 'Technical Analyst' and 'Manual Assessment'.
- Preserved:** Shows 'Quick Stats' for 'Total size (MB): 5615', 'Preserved files: 2552', and 'Number of IEs: 8'. Below is a pie chart titled 'Files by Classifications' with the following data:
 

Classification	Count
Image (Mix)	738
PDF	780
Text (Mark-up)	544

### Remote Institution Monitoring