Version

4

INTERNATIONAL HOUSEHOLD SURVEY NETWORK (IHSN)

National **D**ata **A**rchive (NADA) Version 4.0

Getting Started Guide

INTERNATIONAL HOUSEHOLD SURVEY NETWORK

NADA 4.0 : Getting Started Guide

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Overview

The NADA is a web-based content management application that allows for the building of survey data portals from which researchers can discover, browse and compare information on census and survey data, and where appropriate apply for access and download data.

NADA is as open source application, and is complemented by policy guidelines and other supporting materials, many of which can be found on the www.ihsn.org website. It make use of the XML-based international standards designed for microdata and metadata exchange known as the Data Documentation Initiative (DDI). The NADA is designed to facilitate the process of releasing microdata to the user community, and support the analysis of this data by the provision of standardized information about the data (metadata). Proper microdata management utilizing the NADA software can have the following advantages for data producers:

- Increased quality and diversity of research
- Improved reliability and relevance of data
- Reduced duplication of data collection activities
- Improved visibility of survey institutions as their data becomes more frequently used and is more readily accessible
- Increased donor and public confidence in the survey data producers
- Improved publishing and dissemination efficiency of for data producers
- More efficient access to survey information such as reports, tables, and microdata

Installation

ICON KEY
Important Information
Important Check
Reference Links
Follow steps

Hardware requirements

The NADA application has a very small footprint and as such does not require any special type of hardware configuration. It can even be configured to run on a USB flash drive using a portable web server.

The total application requires at least 100mb of hard disk space for installation. The total amount of disk space that the application will eventually take up is dependent on the number of studies uploaded to the catalog as well as the number and size of any microdata files being disseminated through the application. As with most database based applications a more powerful CPU and more memory will result in a better performance. Special hardware requirements are only applicable if very high server loads are expected.

Software requirements

Operating System:

The software will run on Windows, OS X and Unix\Linux servers.

Web server:

- Apache 2.2+, or Microsoft IIS 7+
- PHP 5.3+ with the following PHP extensions enabled: mysql, simplexml, xsl, zip, mbstring, openssl
- MySQL 5.0 + , MSSQL,
- A mail server running on the server or the ability to send mail through another mail server.
- The NADA 4.0 application: Downloaded from http://ihsn.org/nada

It is beyond the scope of this guide to describe how to setup a web server with the above required software, but the following guides may prove helpful:

- Install and Configure Apache: http://httpd.apache.org/docs/2.2/install.html

- Configuring Microsoft IIS: http://www.iis.net/learn

- PHP on Unix\Linux:
  Most Unix\Linux systems produce versions of Apache, Lighttpd, MySQL and PHP specifically compiled to run on their systems. In this case it is advisable to use the installation method recommended by your operating system to install this software. For example on Ubuntu the command ***sudo apt-get install apache2 php5 libapache2-mod-php5 php5-mysql php5-xsl mysql-server*** will install Apache, MySQL, PHP and the necessary PHP extensions to run NADA. Similar commands exist for most other Unix\Linux operating systems.

  In many cases searching the internet for the Server Guide for your Unix\Linux distribution will provide you with instructions for setting up the required software.

  Tip: For testing and development purposes most Linux distributions also provide instructions for setting up a LAMP (Linux-Apache-MySQL-PHP) server which is an easy means to install all of the above through one package (server bundle\solution stack). These can be found through an internet search for guides on LAMP setup for your Linux distribution.

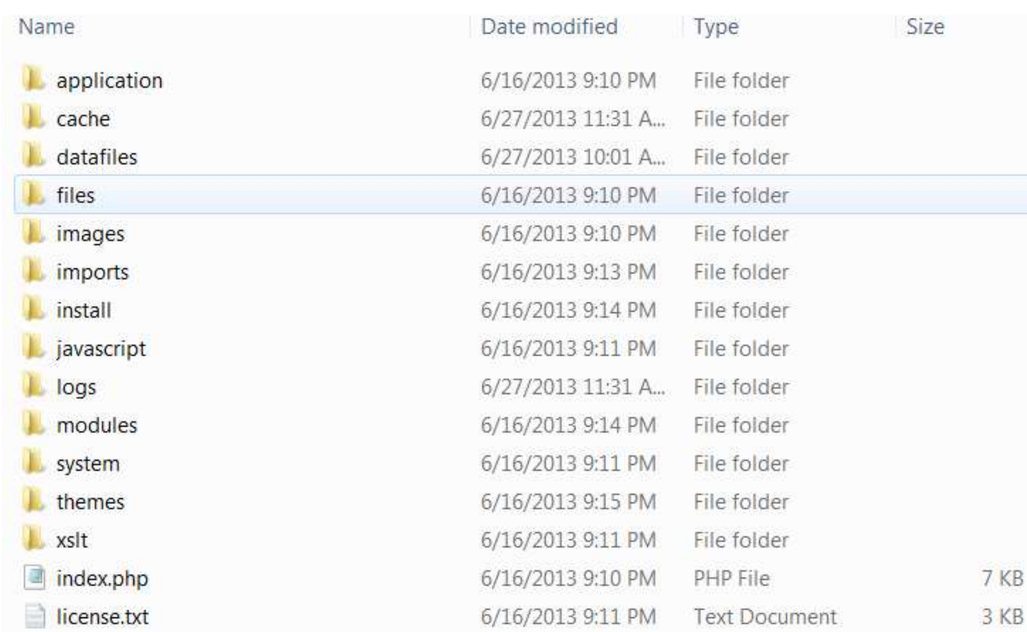
- Microsoft Windows:
  PHP: http://php.net/manual/en/install.windows.php
  MYSQL: http://dev.mysql.com/doc/index.html
  MSSQL: http://msdn.microsoft.com/en-us/library/ms143219.aspx

  An Apache, MySQL, PHP server test environment much like LAMP for Linux is available for Windows and is called a WAMP. A search of the web will yield a number of free options for windows users.

Installing NADA: MySQL

- Download a copy of the NADA 4 software from the IHSN: http://ihsn.org/nada

- Open and extract (unzip) the files to your local hard drive using an appropriate compression program. If you do not already have such a compression program there are many open source compression programs available. For Windows use the built-in compression software wizard or alternatively the 7-ZIP File Manager which is a free compression program. On Linux systems the same tasks can be achieved from the command line, or once again, through the use of a separate program. Mac OSX has a number of options - third party, and built-in, as well as from the command line.



Name	Date modified	Type	Size
application	6/16/2013 9:10 PM	File folder	
cache	6/27/2013 11:31 A...	File folder	
datafiles	6/27/2013 10:01 A...	File folder	
files	6/16/2013 9:10 PM	File folder	
images	6/16/2013 9:10 PM	File folder	
imports	6/16/2013 9:13 PM	File folder	
install	6/16/2013 9:14 PM	File folder	
javascript	6/16/2013 9:11 PM	File folder	
logs	6/27/2013 11:31 A...	File folder	
modules	6/16/2013 9:14 PM	File folder	
system	6/16/2013 9:11 PM	File folder	
themes	6/16/2013 9:15 PM	File folder	
xslt	6/16/2013 9:11 PM	File folder	
index.php	6/16/2013 9:10 PM	PHP File	7 KB
license.txt	6/16/2013 9:11 PM	Text Document	3 KB

  - Copy the files to a **folder** in the web server root folder. If installing on a localhost - for example the computer currently being working on – then copy and paste (or move) the files into the root folder (or a sub-folder) of the web server. If, however, the server is running on a remote host (such as an ISP), then this process will involve the use of a FTP client program or file manager from the ISP's Cpanel.

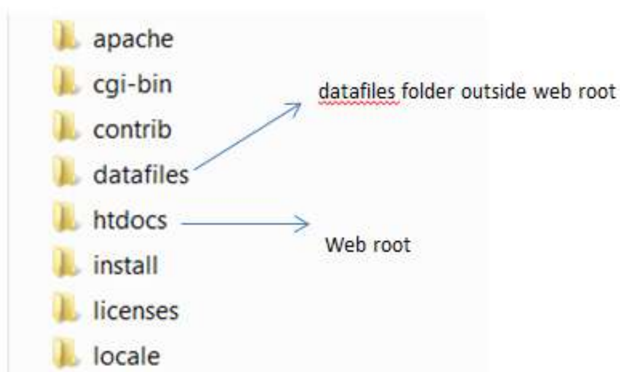
  - Note: The folder name chosen will in many cases become the URL for the catalog. Examples for a folder name might be – data, microdata, catalog etc.

  - The root folder is located in different places depending upon the operating system/distribution and web server package you are using and it might be called **htdocs, httpd, or www**. On Windows servers this might be located in the **inetpub** directory and on Linux in the **/var** directory. Consult the documentation for the distribution being used or contact the ISP if unsure where the root web folder is.

☞ Change the permissions for the following folders and their contents to **read\write** and on Windows servers make sure the "IUSR_" user has **read/write/delete** permissions on these folders:

⌛ *your-nada-web-folder/***datafiles** – this is the folder where the application will store the DDI's, documentation and data.

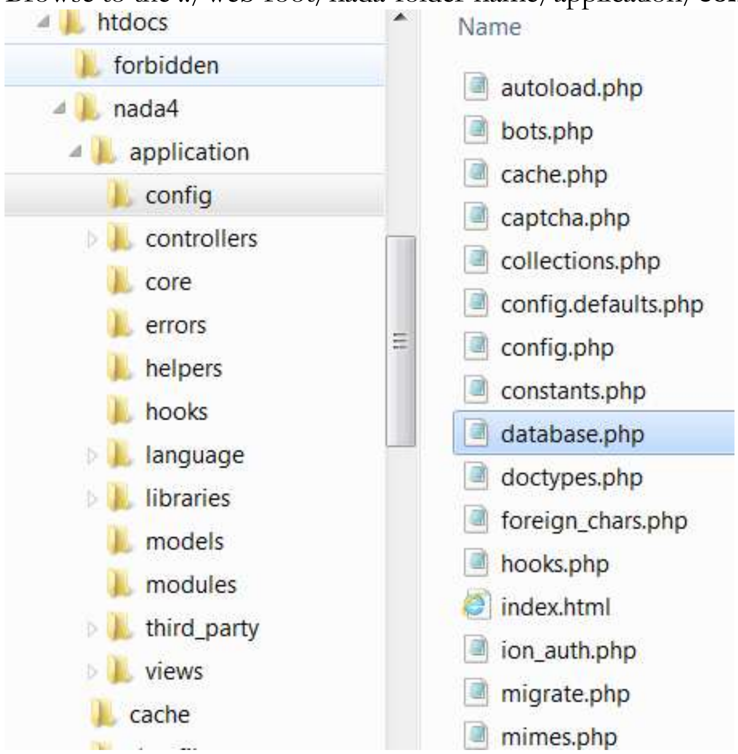
⌛ For added security, it is strongly recommended that the location of the **datafiles** directory be changed **after installation** to a location outside your web root structure.



- your-nada-web-folder/application/**cache** – this is where cached web pages will be stored

- your-nada-web-folder/application/**logs** – this is where the log files will be stored

☞ Browse to the ../web-root/nada-folder-name/application/**config** folder.



NADA database configurations for MySQL

☞ Open the **database.php** file in a text editor like Notepad or Notepad ++, and change the database user name and password to match the database user name and password. Optional: change the database name to use another name. **Save the file.**

$db['default']['username'] = "your-database-username";

$db['default']['password'] = "your-database-password";

$db['default']['database'] = "nada4"

☞ Note: Do **NOT** use the root username and password (MySQL) or SA Account (MSSQL) on your production server. Create a separate user name and password for your NADA database. This can be done either from your Cpanel or from PhpMyadmin, MySQL Workbench.

Creating user accounts and databases in MySQL

Sample command sequence for setting up a ***database*** *user for* ***the NADA*** *– the goal being to avoid using* ***Root*** *for your NADA configuration.*

From the command line type :

mysql -u root –p

Enter your root password you setup when installing MySQL.
Now create a database for the NADA – in this example we call the database nada

mysql> CREATE DATABASE nada;

Now create a user who can access the new nada database and give the user only the rights necessary to run the NADA.

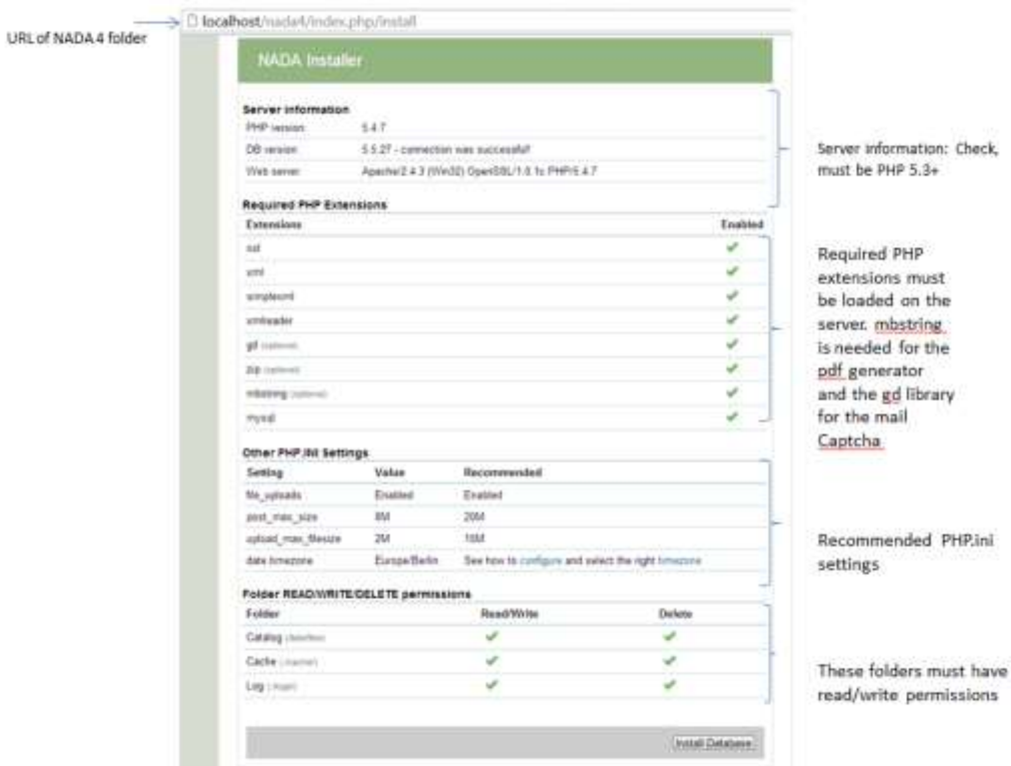
mysql> GRANT SELECT, INSERT, UPDATE, DELETE, CREATE, DROP, INDEX, ALTER, CREATE TEMPORARY TABLES,LOCK TABLES ON nada.* TO 'nada'@'localhost' IDENTIFIED BY 'yourpassword';

'yourpassword' can be anything you choose. nada is the name of the database the user gets access to. localhost is the location which gets access to your database. Note: **remember this password** you will need it to configure your NADA installer! Then exit MySQL console by typing exit.

mysql> exit

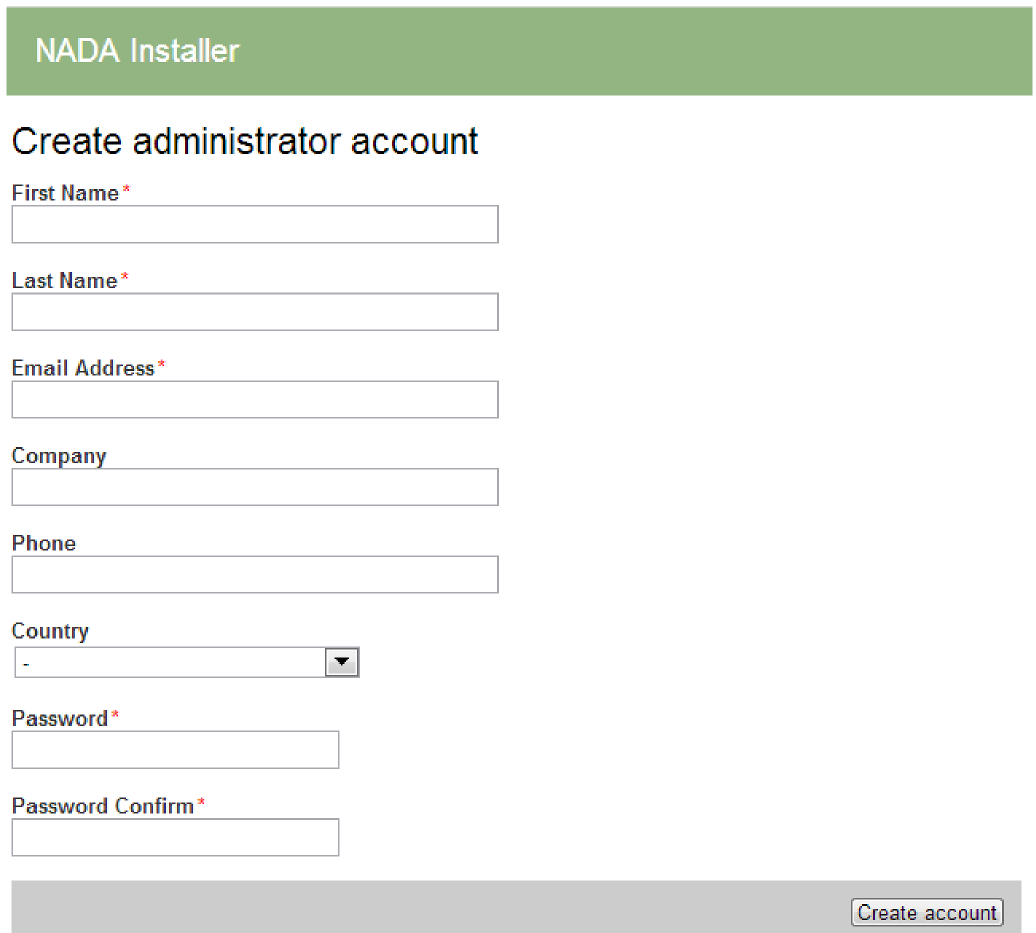
Running the installer

- Open a web browser to the location of the NADA installation. For example: http://your-domain/*nada-folder-name*, or localhost/*nada-folder-name*.

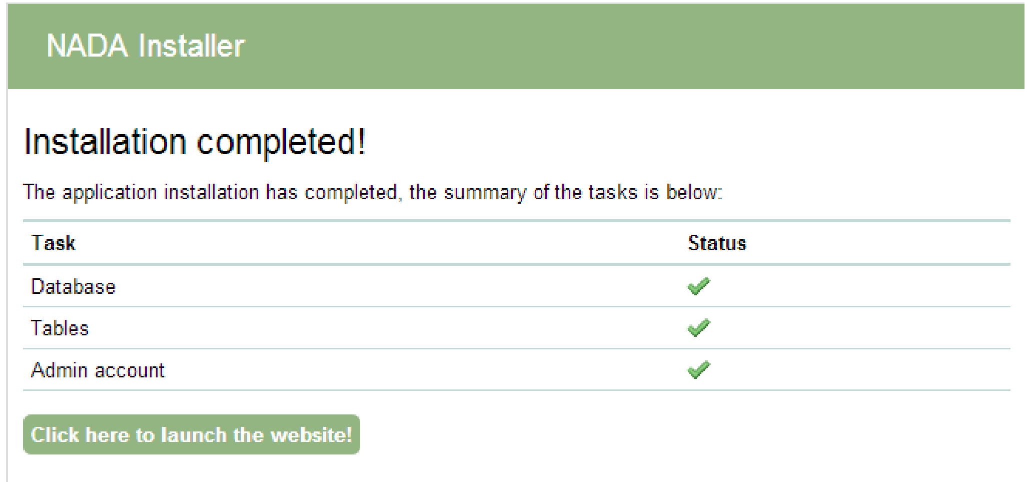


- Check that all settings are marked with a green tick and fix any that are not on your webserver before running the installer.

- Click on the Install Database button and complete the form to create an initial Site Administrator account.
  Note: create a complex password at least 12 characters long with some uppercase, punctuation and numbers to aid security of your site. Do not forget this username and password!



☞ Congratulations: Launch the new site:



Installing NADA: Microsoft SQL

NADA 4 with SQLSRV drivers

✍ The new Microsoft SQL drivers for PHP are called SQLSRV and provide native support for connecting to a Microsoft SQL Server database. The drivers have been tested with NADA for SQL Server 2008 and 2012.
The drivers are available for download from here: http://www.microsoft.com/en-us/download/details.aspx?id=20098

NADA Microsoft SQL Requirements

To use Microsoft SQL Server database for NADA, it is recommended to use SQL Server 2008, or later, with **Full-Text** support enabled. The full-text engine provides faster search than the normal SQL search.

✍ The default installation of SQL Server does not include the Full-Text engine, so before continuing on to installing NADA, please make sure you have full-text installed on your database server.

Driver Requirements

Microsoft provides two versions of the SQLSRV drivers namely version 2.0 and 3.0. NADA has only been tested with version 2.0 but should work with version 3.0. Requirements for using the version 3.0 drivers:

- Windows 7, Windows Server 2008 R2, Windows Server 2008 Service Pack 2, Windows Vista Service Pack 2
- Windows 7, Windows Server 2008 R2, Windows Server 2008 Service Pack 2, Windows Vista Service Pack 2

- PHP 5.3.6 or PHP 5.4. For more information about downloading and installing PHP, visit PHP on Windows.
- Microsoft SQL Server 2012 Native Client available in the SQL Server 2012 Feature Pack.
- Any edition of SQL Server 2005 or later.

The Microsoft SQL Client

Microsoft SQL Client is required for connecting to your SQL database using NADA. The client is installed automatically if your database is hosted on the same machine as your web server. If your SQL database is running on a different machine then you must install the latest version of the SQL Client on your web server to ensure NADA can connect to your database. See section on installing Microsoft SQL Client.

How to install the SQLSRV driver for PHP

Note: The steps are for version 2.0 but the same applies to version 3.0

🕮The drivers are available from the Microsoft website:
http://www.microsoft.com/downloads/en/details.aspx?FamilyID=80e44913-24b4-4113-8807-caae6cf2ca05

- Download the drivers and run the setup file.
- The setup file will extract a number of .dll files to your PHP extension folder.
- Browse to the PHP extension folder E.g. c:\php\ext.
  Notice there are multiple dll files included all referencing _sqlsrv.
  - php_sqlsrv_52_nts_vc6.dll
  - php_sqlsrv_52_ts_vc6.dll
  - php_sqlsrv_53_nts_vc6.dll
  - php_sqlsrv_53_nts_vc9.dll
  - php_sqlsrv_53_ts_vc6.dll
  - php_sqlsrv_53_ts_vc9.dll
- To find out which driver library is suitable for your version of PHP, create a php file using a text editor like Notepad e.g. info.php and place this code inside it:

```
<?php
phpinfo();
?>
```

- Save the file and copy it to your web server root folder. Open your web browser and type the location and name of the file e.g. info.php into your browser URL. The phpinfo() function prints your PHP version and other configuration settings for PHP. For Example: **localhost/info.php.** To select the right sqlsrv DLL, you need to know:

- The version of PHP. E.g. 5.3
- Which compiler is used e.g. either VC9 or VC6
- Check whether Thread Safety is enabled or not.

PHP Version 5.3.6

System	Windows NT PN3022058 6. i586
Build Date	Mar 17 2011 10:46:06
Compiler	MSVC9 (Visual C++ 2008)

Thread Safety	disabled

- With the above values you would choose the file:
  php_sqlsrv_53_nts_vc9.dll
  ts=Thread safety
  nts=Non-thread safety

- Once you know which dll file to use, open the php.ini file using a text editor and add the following entry at the end of your PHP.INI file.:

  extension=php_sqlsrv_53_nts_vc9.dll

- Save your php.ini file and restart your web server.

Testing the drivers

- To make sure the driver/extension is installed correctly. Reload the phpinfo page and check if the extension SQLSRV is listed on the page.

sqlsrv

sqlsrv support	enabled

Directive	Local Value	Master Value
sqlsrv.LogSeverity	0	0
sqlsrv.LogSubsystems	0	0
sqlsrv.WarningsReturnAsErrors	On	On

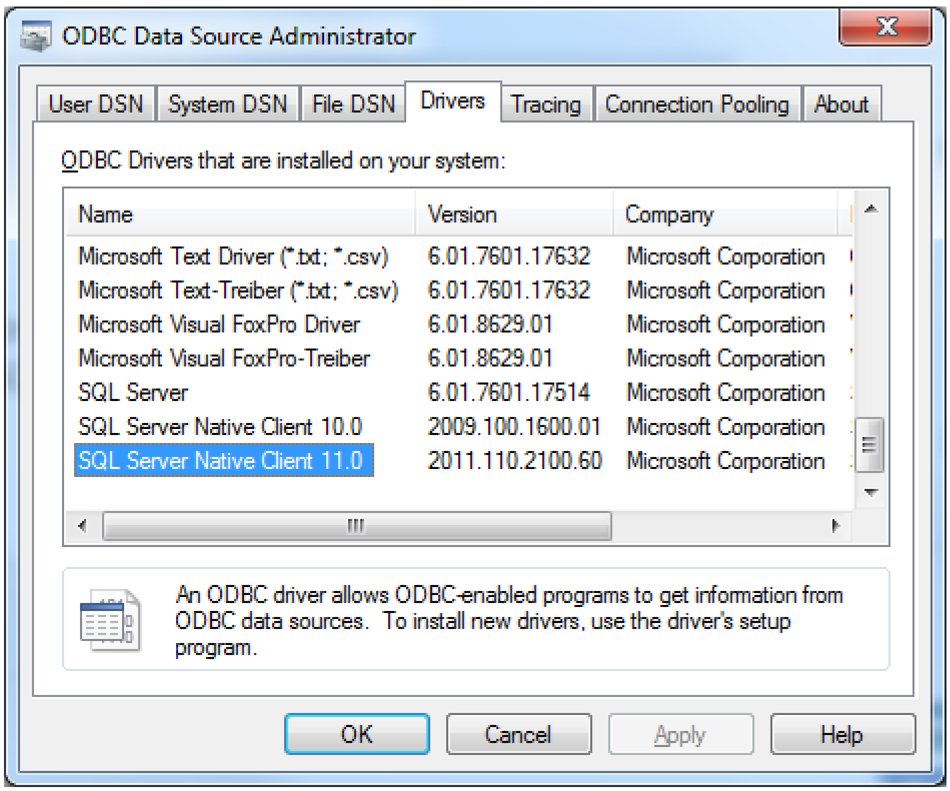
- If the extension is not listed on the page, recheck if the correct php.ini file has been edited. To locate the php.ini file being used by PHP look at the output of the phpinfo page in the section shown below.

Configuration File (php.ini) Path	C:\Windows
Loaded Configuration File	C:\Program Files\PHP\php.ini

SQL Client Installation

This step is only required if SQL Server is not on the same server as your web server. To check if the SQL Client is already installed or not, follow the steps below:

- Open Control Panel, Administrative Tools on your server
- Open ODBC and switch to the tab "Drivers"



If the SQL Client is installed, you should see it listed as "SQL Server Native Client 10.0".

Download the Microsoft SQL Client

Note: The instructions here are provided for Microsoft SQL Server 2008, if are running on a later version of Microsoft SQL Server, the latest drivers can be obtained from the Microsoft website. The installation steps are the same.

📖 The SQL Client is available from the Microsoft website from here:
http://www.microsoft.com/en-us/download/details.aspx?id=16978
Microsoft® SQL Server® 2008 R2 Native Client

Microsoft SQL Server 2008 R2 Native Client (SQL Server Native Client) is a single dynamic-link library (DLL) containing both the SQL OLE DB provider and SQL ODBC driver. It contains run-time support for applications using native-code APIs (ODBC, OLE DB and ADO) to connect to Microsoft SQL Server 2000, 2005, or 2008. SQL Server Native Client should be used to create new applications or enhance existing applications that need to take advantage of new SQL Server 2008 R2 features. This redistributable installer for SQL Server Native Client installs the client components needed during run time to take advantage of new SQL Server 2008 R2 features, and optionally installs the header files needed to develop an application that uses the SQL Server Native Client API.

Audience(s): ***Customer, Partner, Developer***
X86 Package *(sqlncli.msi)*
X64 Package *(sqlncli.msi)*
IA64 Package *(sqlncli.msi)*

- Download the appropriate package for the system being used i.e. (32bit/64bit) and run the installer to install the client.
- Once the client is installed, restart your computer and check again from the ODBC screen above to confirm that the client has been installed.

NADA Database configurations for SQLSRV

- Create a database and the user account to use with NADA beforehand. The permissions need to include - create/alter tables, indexes.

  📖 See the following reference from Microsoft for instructions on how to do this. Database - http://msdn.microsoft.com/en-us/library/ms186312.aspx
  User - http://msdn.microsoft.com/en-us/library/aa337545.aspx

- Open the nada database configuration file /your-nada-folder/application/config/database.php file and look for the following lines:

```
$db['sqlsrv']['hostname'] = "localhost\sqlexpress";
$db['sqlsrv']['username'] = "db-user-name";
$db['sqlsrv']['password'] = "password";
$db['sqlsrv']['database'] = "nada-database";
$db['sqlsrv']['dbdriver'] = "sqlsrv";
$db['sqlsrv']['dbprefix'] = "";
$db['sqlsrv']['pconnect'] = FALSE;
$db['sqlsrv']['db_debug'] = FALSE;
$db['sqlsrv']['cache_on'] = FALSE;
$db['sqlsrv']['cachedir'] = "";
```

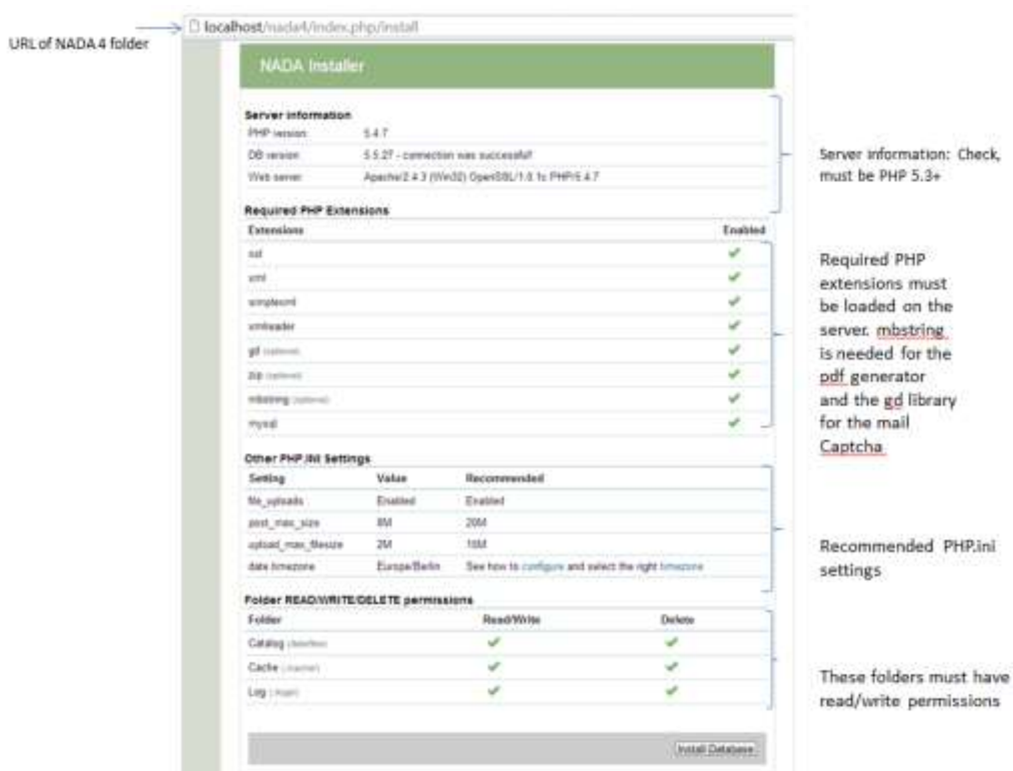
$db['sqlsrv']['char_set'] = "utf8";
$db['sqlsrv']['dbcollat'] = "utf8_general_ci";

- ☞ Fill in the database connection settings for the database created for NADA.
- ☞ Save the changes.

Running the installer

- ☞ Open a web browser to the location of the NADA installation. For example: http://your-domain/*nada-folder-name*, or localhost/*nada-folder-name*.

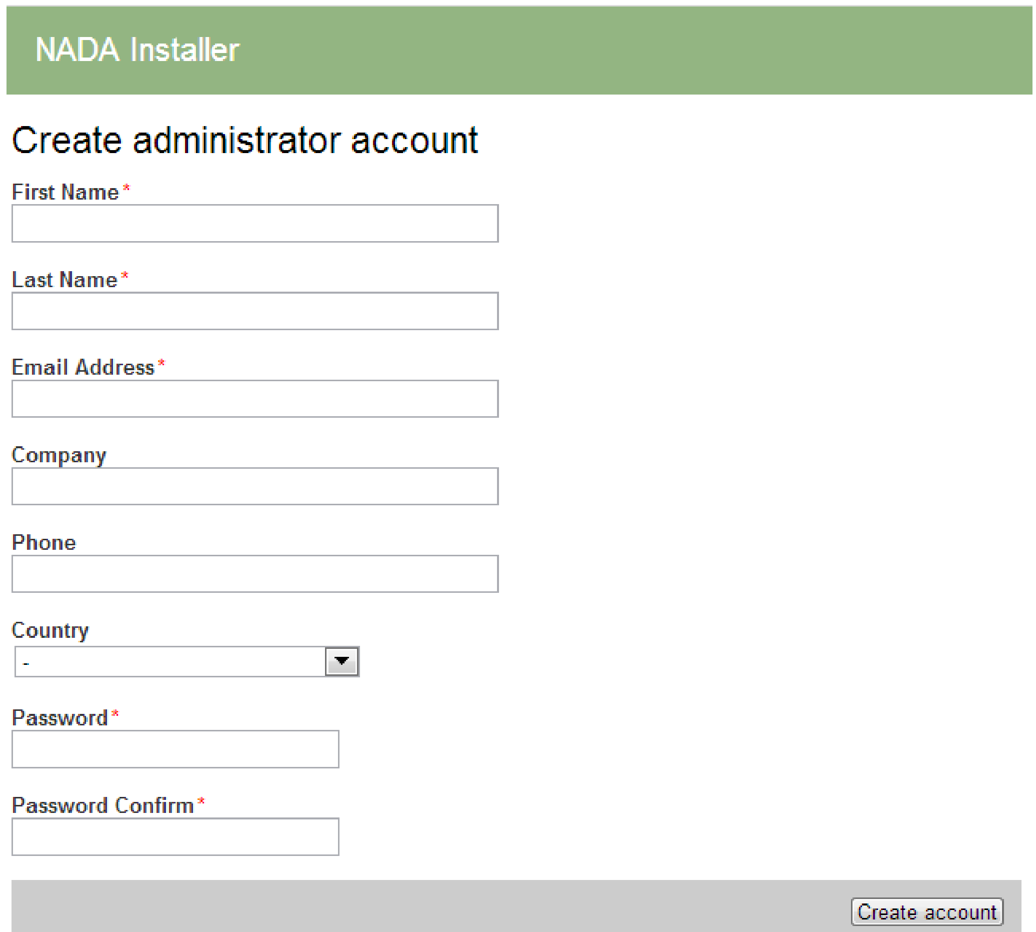
- ☞ If the Microsoft database connection is setup correctly, you should see the nada installer.



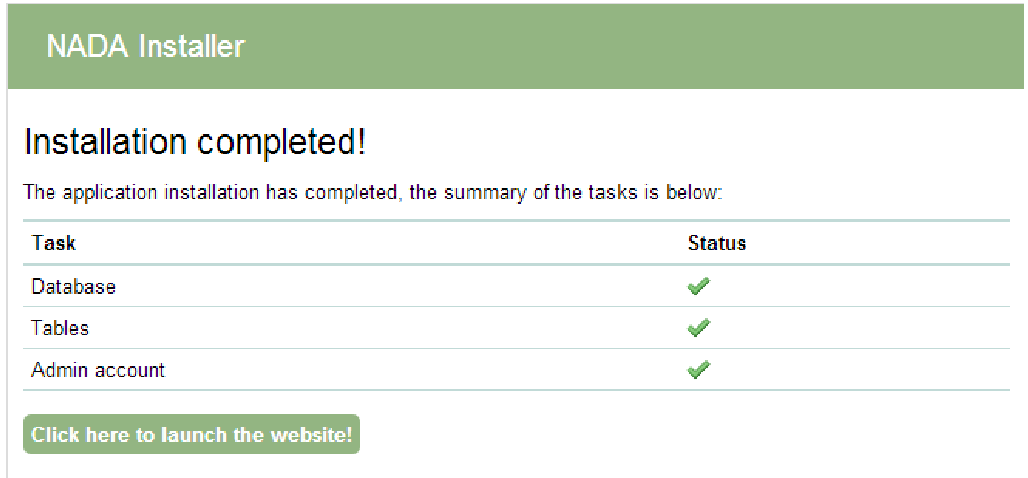
- ☞ Check that all settings are marked with a green tick and fix any that are not on your webserver before running the installer.

☞ Click on the Install Database button and complete the form to create an initial Site Administrator account.

⌛ **Note: create a complex password as least 12 characters long with some uppercase, punctuation and numbers to aid security of your site. Do not forget this username and password!**



☞ Congratulations: Launch the new site:



Upgrading from NADA 3.x to NADA 4.x

For users with an existing NADA 3.x catalog an upgrade script is included that will update your NADA 3.x database to NADA 4.x. **The process involves modifying your NADA 3.x database and thus carries some risks.** The script will add new tables to the NADA 3.x database. All user accounts and survey information will be retained by the upgrade.

- ☞ **Backup the NADA 3.x database before doing anything!!**

- ☞ Follow the instructions on page 4 and set up a folder in the web root containing the NADA 4 files.

- ☞ Edit the database.php file as instructed in the section above: **NADA database configurations for MySQL.**

- ☞ Instead of entering a new database name, user account name and password - fill in the details of **the existing NADA 3.x database**. Note: these can be found by looking at the existing NADA 3.x database.php file and entering the settings into the NADA 4 database.php file.

```
$db['default']['hostname'] = "localhost";
$db['default']['username'] = "NADA3_database_username";
$db['default']['password'] = "NADA3_database_password";
$db['default']['database'] = "NADA3_database_name";
$db['default']['dbdriver'] = "mysql";
```

- Save the file.

- Navigate to the URL for the NADA4 site:

  Example: http://your-nada-site/nada4/index.php/nada4_upgrade

- The following page loads:

  Take note of the warnings and make any necessary corrections before clicking the "Upgrade database to NADA 4" button.

- **Warning: This step makes changes to your nada 3 database that are not undo-able so make sure you do make a database backup before this step.**

- Click on the "Upgrade database to NADA 4" button and wait for the page to reload. The output of the page will look something like below:

- The script will print number of messages about failed table updates. This does not mean the script failed to upgrade. It just means some of the updates were not needed on your version of NADA 3. Different versions of NADA have different numbers of fields in the database and the upgrade script tries to fix the missing fields for all these different versions of NADA. If the existing NADA 3 database already has that field then it reports it as an error.

- You can ignore the error messages that include the wording "Duplicate column name" or "Duplicate entry".

- Verify the database upgrade. Open the NADA catalog page by going to http://[your-nada4-site]/index.php/catalog page and verify all studies from NADA 3 are listed.

Linking your NADA 3 data files to NADA 4

The upgrade script has only upgraded the database. It is now necessary to tell the NADA4 where to locate the datafiles that were uploaded to the original NADA 3 site.

There are two options available:

- Option 1: Copy the datafiles folder from NADA 3 to NADA 4. This works best if you have only a few studies and the datafiles folder size is small enough to be moved easily from one location to another.

- Option 2: If it is not possible to easily move the datafiles folder from NADA 3 to NADA 4, you can tell NADA 4 the location of the datafiles without moving the files. Here are the steps:

- Use your NADA 3 administrator login credentials to login to your new NADA 4 site.

- Click on Site administration in the top right corner of the screen.

- Go to the "Settings" menu and click on the "Settings" sub-menu .

- Under Site configurations, expand the "Survey Catalog Settings" section

- For the setting "Catalog folder", enter the relative or full path to where the NADA 3 datafiles folder is located. For example, if the nada3 datafiles are located on c:/nada3/datafiles, enter that path here.

- Save the configurations by clicking on the update button. If now errors are shown then you have successfully updated the folder path.

- Check your new NADA 4 site to make sure the migration was successful

  - Check the user administration page from site administration to make sure the users from the nada3 site were migrated.

- Check the "Data Catalog" page and view the studies by clicking on the study title to make sure the study information pages are correct.

- Check the site menus are the same as the NADA 3 site.

Refresh DDI

In NADA 4, more information is stored in the database from the DDI than in the NADA 3. To bring all these new fields into the imported studies it is necessary to refresh the DDI's. The refresh DDI feature in NADA updates the database with metadata from the DDI without having re-uploading the DDIs.

To update the metadata for all studies in your catalog:

☞ Open the following NADA 4 URL in your browser:

http://[your-nada-4-site]/index.php/admin/catalog/batch_refresh

☞ **Select all studies**

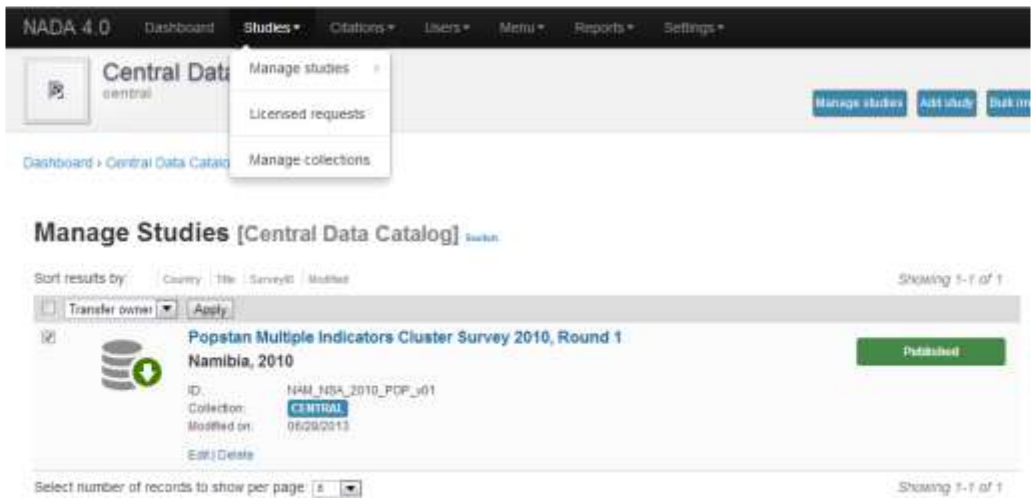
☞ **Click on the "Refresh DDI" button**

Transferring ownership

NADA 4 has a collection management feature. When studies are imported from the NADA3 catalog into NADA4 they are put into a collection called DEFAULT. They need to be moved from this default system collection to the Central Data Catalog of the NADA4.

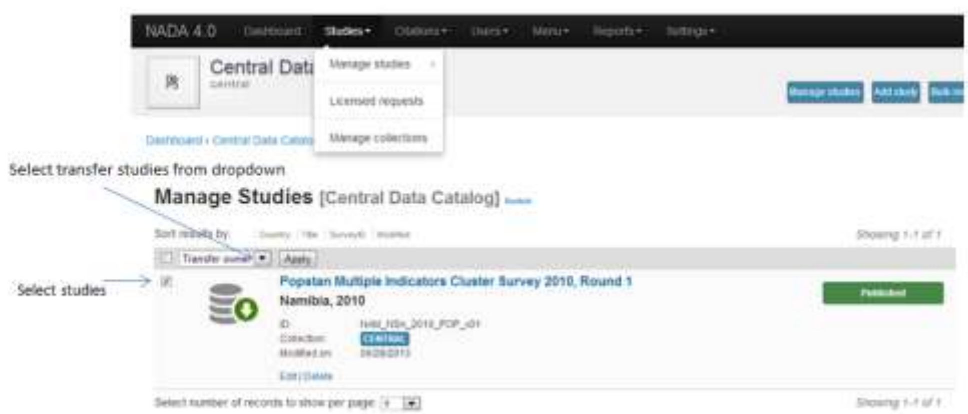
To do this:

- Go login to the Site Administration and navigate to the Studies, Manage Studies, Central Data Catalog page

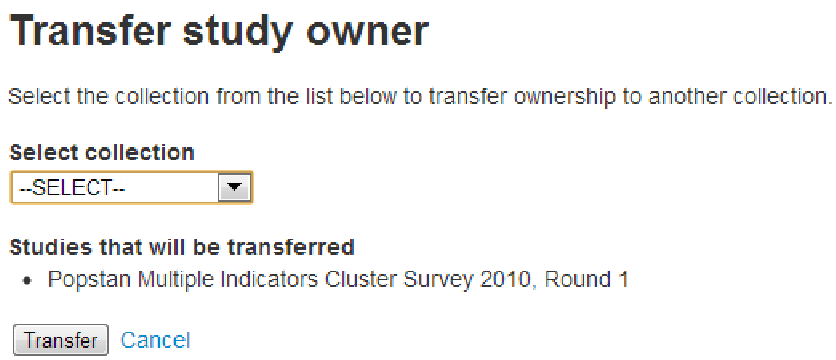


- Select all the studies by ticking the check boxes next to each study on the right.

- Click on the dropdown menu and select Transfer owner



- From the Transfer study owner page: Select Central Data Catalog and then click transfer.



Updating the Site theme/template

You cannot use your NADA3 template in NADA4 without making some changes. Here are general guidelines but steps may differ depending on your nada site template.

- Copy your NADA3 template to the NADA4 themes folder.
- Edit the [nada4-root]/config/template.php following the steps below:
- Look for the setting "theme_name", by default it is set to "wb":
- Change "wb" to the theme name you want to use. Theme name is the folder name you copied to [NADA4]/themes/[your-site-theme] from your nada3 site.
- Save the file.
- **NB: The template may need some adjusting to run properly on the new NADA 4 site. This will involve editing the layout.php and other template files within the template folder which is now located in the NADA 4 themes folder.**

Post installation configuration

After installation there are some important post-configurations to set. The most important of these is the configuration of the site email settings.

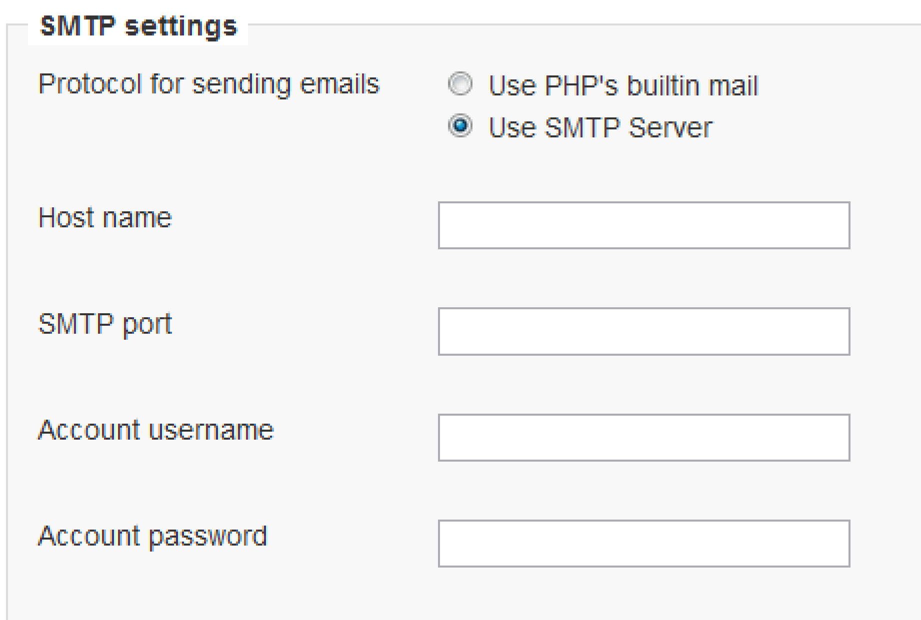
Other settings that might need to be set include: setting the path to the datafiles folder if the recommendation to move this outside the web root folder is to be followed.

Configure Email settings

For the NADA to function correctly it is important that this step be completed.

Many of the functions within the NADA – such as registration and applying for access to datasets require that the NADA be able to send emails to users.

- Login to your NADA as an administrator
- Go to Site administration, click on the Settings menu and choose “Settings”
- Find the section “SMTP settings”



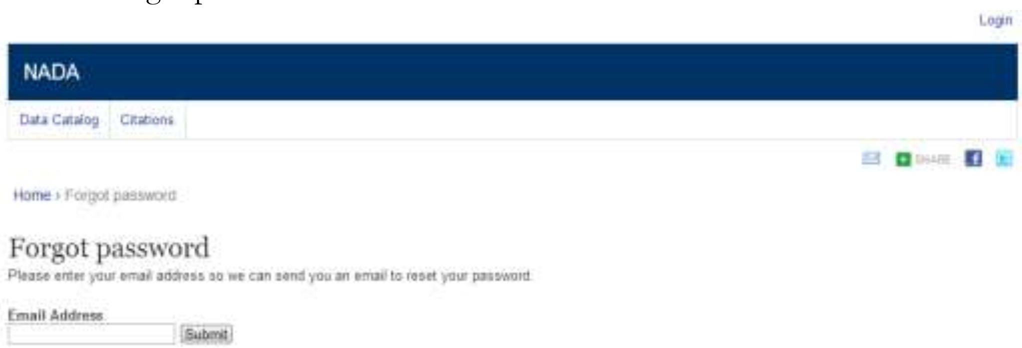
- If the PHP/web server is configured to send email using PHP’s MAIL function, select the first option and don’t fill in anything else.
- If the organization has a mail server and has a dedicated account that can setup for NADA, use the following settings:
    - Check the radio button “Use SMTP Server”
    - Host name: Enter the mail server’s address e.g. mail.example.org
    - SMTP port: Enter 25 or whatever port your server is running on.
    - Account username: Enter the username/email address for the mail server. For example, nada@example.org
    - Account password: Enter the password for the mail server
- If the organization does not own a mail server, a Gmail account can be configured to be used with NADA.
    - Check the radio button “Use SMTP Server”
    - **Host name:** ssl://smtp.googlemail.com or ssl://smtp.gmail.com
    - **SMTP port:** 465

- **Account username:** email-address@gmail.com
- **Account password:** password for the gmail account

- Test the email settings

The quickest way to test if the email settings are working is to use the "forgot password" option from the user login page.

- Click on forgot password



- Enter the administrator or any other accounts email address.
- Check to the email account the mail was sent to.
- If no mail is received the settings are wrong and need to be corrected.

Change the datafiles folder location

- Use your administrator login credentials to login to your new NADA 4 site.
- Click on Site administration in the top right corner of the screen.
- Go to the "Settings" menu and click on the "Settings" sub-menu .

- Under Site configurations, expand the "Survey Catalog Settings" section

- For the setting "Catalog folder", enter the relative or full path to where the datafiles folder are now located (outside root). For example, if the nada3 datafiles are located on c:/nada3/datafiles, enter that path here.

- Make sure this folder has read write permissions.

- Save the configurations by clicking on the update button. If no errors are shown then you have successfully updated the folder path.

Chapter

2

Site Management

Understanding NADA 4

NADA is a web-based cataloging application that allows for the creation of portals that allows users to browse, search, compare, apply for access, and download relevant census or survey information.

It was originally developed to support the establishment of national survey data archives. The application is used by a diverse and growing number of national, regional, and international organizations. NADA, as with other IHSN tools, uses the Data Documentation Initiative (DDI), XML-based international metadata standard.

Concepts

CENTRAL DATA CATALOG

The default catalog created when a NADA instance is installed is the Central Data Catalog. All studies uploaded to the NADA are visible, searchable and accessible from the Central Data Catalog. For many institutions the Central Data Catalog will remain the only catalog in their NADA instance. For some institutions being able to divide the contents of the Central Data Catalog into more refined collections will be desirable.

COLLECTIONS

Collections are sub categories of the Central Data Catalog. They allow administrators of a NADA instance to group studies into what can be thought of as sub-catalogs of the Central Data Catalog. This has a number of benefits both from the user and the administrator perspective. From the users' perspective, being able to filter and view groups (collections) of studies that logically belong together makes finding what they are looking for easier. From the administrators' perspective, the ability to create collections of studies that may logically belong together facilitates the ability to decentralize the management of each collection of studies to specific administrators (for example collections can be managed by different departments in an institution).

NOTE: The creation of collections will in general only be useful and necessary for large catalogs or for catalogs that desire more decentralized management of groups of studies by different departments.

STUDIES

Studies are carried out to gather more knowledge about a subject. Studies may gather information from a number of different sources in order to answer the questions asked. The information gathered for a study will, in the context of NADA catalogs, usually come from either a census or a survey\s. It is therefore not uncommon to hear the terms survey and study used interchangeably when listening to people talk about their NADA catalog.

METADATA

Metadata are data about the data. They are not the actual data collected from the survey, but rather the information that describes the survey process and the data. The NADA uses the Data Documentation Initiative (DDI) – ddialliance.org – standard for the presentation of metadata for each study. The DDI document (which is an XML document) is prepared outside the NADA application either manually or using a tool like the Nesstar Publisher – nesstar.com – and then imported into the NADA. The detailed information about the survey is searchable down to the variable level for each survey in the catalog.

DATA ACCESS TYPES

The NADA allows for the level of access to datasets for studies to be controlled at the study level. In other words the level of restriction can differ from study to study and can be defined on a scale ranging from direct access, with no restrictions, to no access. Briefly the available access types are:

- *Data not available* - data are not available for this study.
- *Direct Access Data Files* - data shared under this policy can be downloaded without any restrictions. The user is not required to be logged into the site

and no personal information is collected on the person downloading the data.

- *Public Use Data Files* - data shared under this policy requires that the user be logged in and registered on the site before they are able to download the data. The user is required to agree to a terms of use of the data and the application keeps records of who downloads the data.
- *Licensed Data Files* - data shared under this policy requires that the user be logged in and registered on the site. Users are also required to fill in and submit a detailed application form listing their reasons for wanting access to the data. Once the user submits the application form the system informs the system administrator that an application has been made. In order for the person to get access to the data the system administrator needs to review the application and approve it.
- *Data available in an Enclave* - under this policy no data is shared through the application. Users submit an application to access the data at a secure facility physically located on the premises of the data producer or a facility nominated by the data producer.
- *Data available from external repository* – The NADA allows for studies and their metadata to be listed in a NADA catalog but for a link to be created to another site when the data for that study are available elsewhere.

CITATIONS

Citations are references that can be included at the study level which point to published works that have used the data from a particular study. In many cases this will be a reference to a Journal Article, Working paper, Newspaper article etc. Such resources are useful to researchers who are interested in seeing how the data have been used before. They are also a good way of showing the funders of surveys that the data are being used for policy and research purposes and thus are an indicator of some of the impact a study has had.

USERS

Users in the NADA can be defined according to three broad groups:

- **General Users** – this is the normal user who registers on a NADA site from the user interface. This user type has no access to the site administration. It is required to register as a user when accessing public use and licensed data types.
- **Site Administrators (unlimited)** – this user has access to all functions and all collections within the Site Administration. System wide access.
- **Limited Administrators** – these administrators have access to a limited set of functions within the Site Administration. Examples would be an administrator

of a specific collection\s, or licensed survey reviewer for all or only some collections, or report generator etc.

Why do NADA administrators need to understand these concepts?

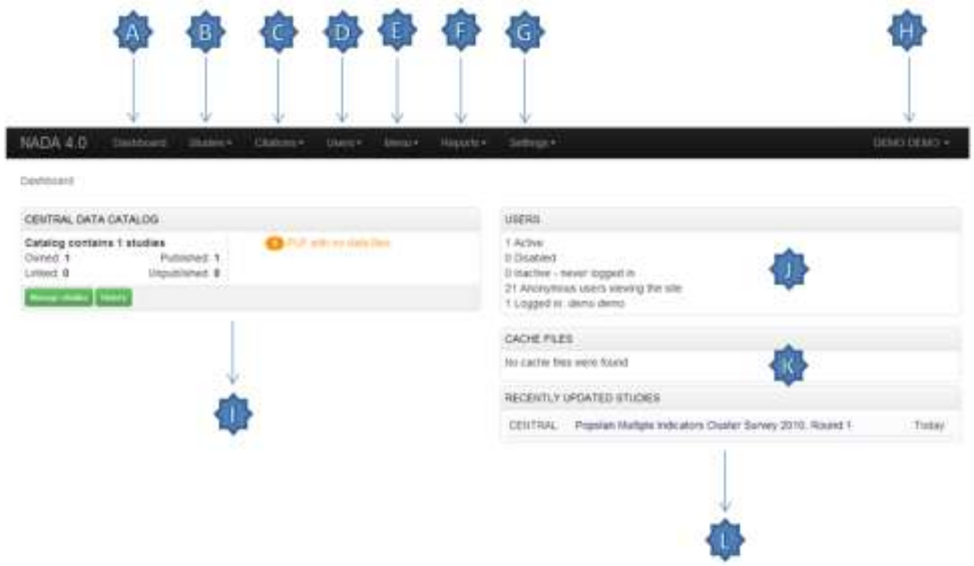
Understanding these concepts is important as it:

- Is critical to understanding the new permissions, and administrator types introduced in NADA 4. Administrators are now able to ***create collections*** within their NADA's and ***assign different roles to administrators*** and more granular levels of access to catalog administration at the collection level. It is now possible, for example to have administrators who's '*powers' range* from being able to manage all parts of a collection's administration down to ones with more restrictive access such as ones whose only function is as licensed survey reviewer, or report generator, or catalog reviewer, or citation manager. etc.
- Ensures that the correct level of permissions and access is assigned to users based on security policies within the institution. Unlike previous versions of NADA, not all users who have access to the Site Administration need have the level of access of an "unlimited site administrator". This limits security risks associated with having too many "unlimited site administrators" managing a site.
- Assists in assigning an appropriate data access type to data based on institutional distribution polices.
- Makes it easier to explain more clearly to institutional managers what the capabilities of the NADA application are and to advise on how to best manage the allocation of responsibilities.

The Dashboard

After logging in to the Site Administration with administrator credentials the user is taken to the dashboard.

The Dashboard provides a quick glance summary for administrators to get an overall picture of what has been happening on the site as well as what pending tasks are outstanding for the administrator.



A. Menu link to the Dashboard

B. Menu link to the Study Management pages, submenus include: Manage Studies, Licensed requests and Manage Collections

C. Menu link to the citations management pages

D. Menu link to the User management pages, submenus include: All users, Add user and Impersonate User

E. Menu link to create menu pages for the site frontend

F. Menu link to generate usage reports

G. Menu Link to the settings pages, submenus include: Settings, Coutries, Regions and Vocabularies

H. Useful navigation links, submenus include: Change Password, Log out, Catalog Home, Data catalog, Citations

I. This section lists all collections in the catalog. Within each collection a summary is given of the number of studies along with diagnostics related to the number of studies published\unpublished, missing questionnaires, data access types set but with no data attached as well as some buttin links to Manage the collections, studies, users and a History of changes made to the collection

J. Provides a summary of users, registrations and number of users currently logged in.

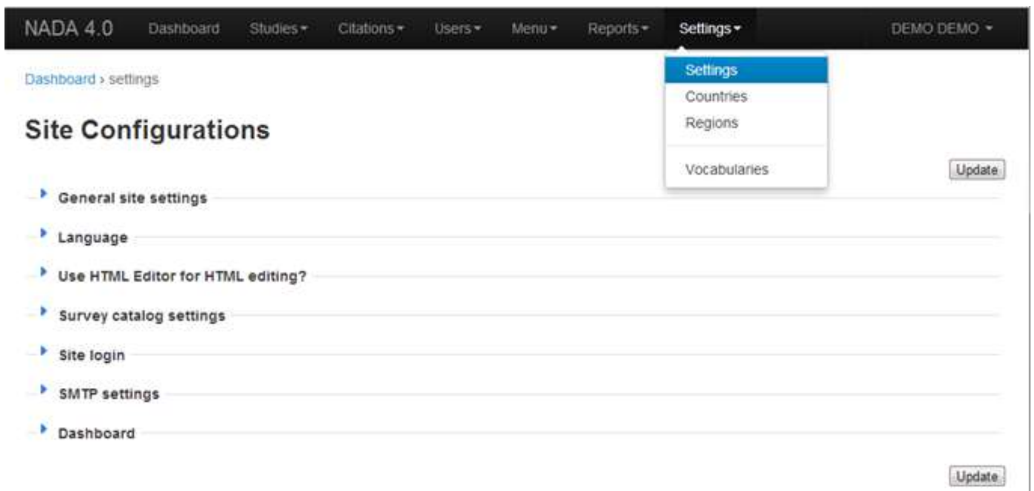
K. Show how many pages are being cached on the site with a link to clear the cache if need be.

L. Show a list of recently added or updated studies. Clicking on a study in the list takes you to the page to manage that study.

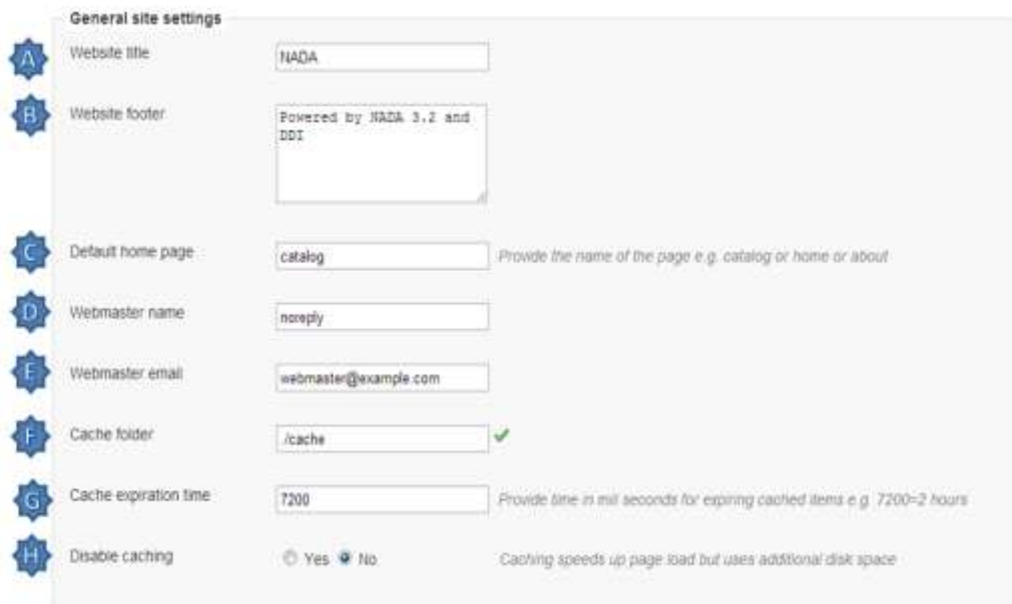
The Site Settings Page

ICON KEY	
	Important Information
	Important Check
	Reference Links
	Follow steps

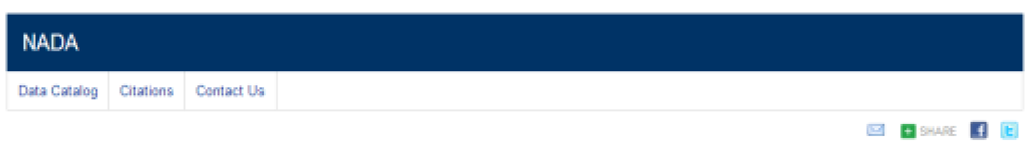
All settings for the application are controlled via the Settings menu at the top of the Site Administration page. There are seven main settings sections: See screenshot below.



General Settings



A. Type the Title of the site here: This will become the front page title of the NADA site. In this case the Title is NADA



B. The footer text can be changed in this field. This displays at the bottom of your site page.

C. The initial page that loads when a user visits the NADA site can be set here. In this case the catalog page is set to open by default.

D. The name of the webmaster can be set here. This is the name that will be used in system emails sent to users.

E. ⌛ Enter the webmaster email address here. This should be the address that will be used in communication with users. Typically this is a general enquiries email set up by the organization and not a personal email address for a particular person. **Note: to avoid mail systems rejecting mail as spam make sure to enter an address here that is on the same domain as the server used in the email settings at setup.**

F. This field sets the location of the Cache folder. The cache folder stores pre-generated pages of the site to allow for faster browsing by the user. By default it is set to ./cache. This can be moved to another location if desired but must be writable. The green tick indicates that the folder can be found and is set up correctly. Enter either relative or absolute paths to the folder location.

G. Set the time that the Cache takes to expire. By default it is set to 2 hours (in milli seconds).

H. If it is desired to turn off caching then select no here. Sometimes it is useful to turn off caching when developing or updating a site so as to ensure that content changes become immediately visible on the front-end without having to wait for the cache to expire and the new changes to show. Turn this back on to speed up page loading for users.

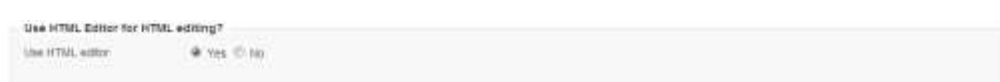
⌛ Click update to save all settings.

Language

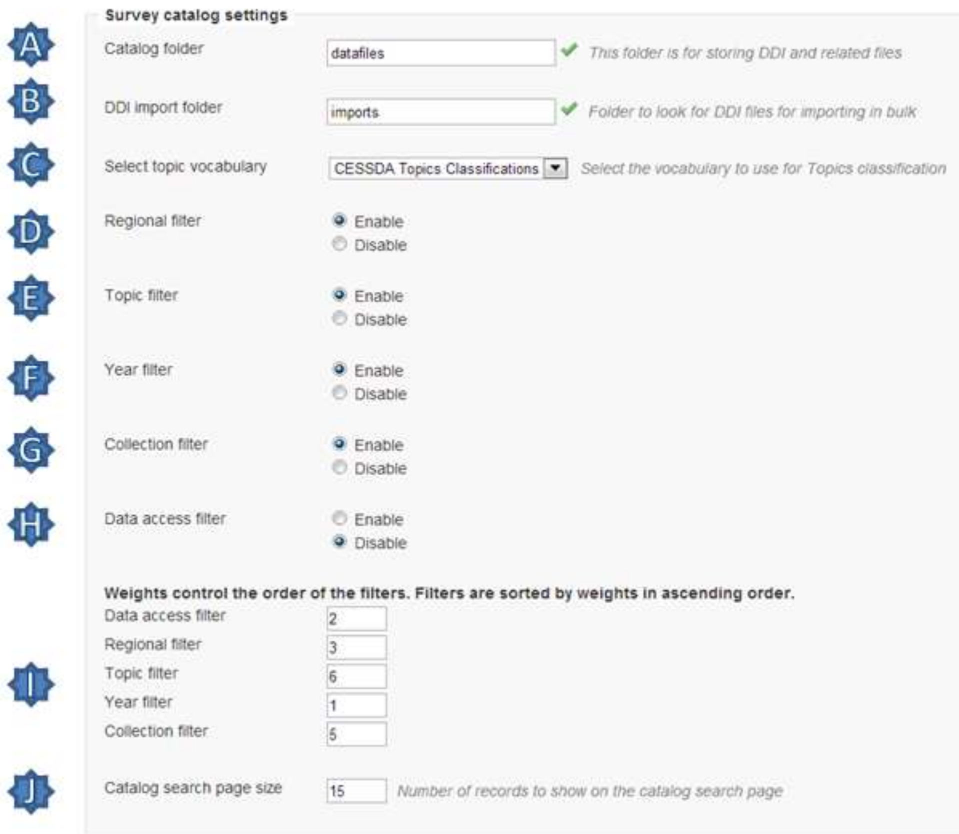
☞ To change the language of the application expand the language section and choose the desired language. Click update to save and apply the setting.

Enable or disable the HTML editor

☞ A basic HTML editor is provided in the menu and page creating section of the application. This setting allows this to be turned on or off.



Survey catalog settings



A. This is the folder where the files for the study are stored on the server. This includes the DDI, eternal resources and data files. This folder can be moved to a location outside the web root as described in the installation instructions in Chapter 1. Enter either relative or absolute paths to the folder location.

B. This is the folder where DDI's can be placed in order to use the bulk study import function in the NADA. In NADA3 files had to be physically copied to this folder on the server, but this is no longer necessary in NADA 4. Files can now be directly uploaded to this folder from the Site Administration – Manage Studies page page.

C. Select the vocabulary to use for the topic filter. By default this is set to the CESSDA classification as recommended in the IHSN templates supplied at IHSN.org for the Nesstar Metadata Publisher.

D. Enable or disable the Country filter on the user interface search page here. If the catalog only contains studies for one country then turning this filter off is recommended.

E. Enable or disable the Topic filter on the user interface search page here. If no topics have been defined in the DDI's being uploaded then it is recommended to turn this filter off (disable).

F. Enable or disable the Year filter on the user interface search page here.

G. Enable or disable the Collection filter on the user interface search page here. If no collections have been defined then it is recommended to disable this filter.

H. Enable or disable the Data access filter on the user interface search page here. This filter is not needed if there are very few studies in the catalog or if all studies hare set to the same access type.

I. This section controls the order in which the filters appear on the search page. Enter numbers here that rank the order of the filters in the order they should be displayed.

J. This setting determines how many studies are displayed by default to the user on the search page – catalog view.

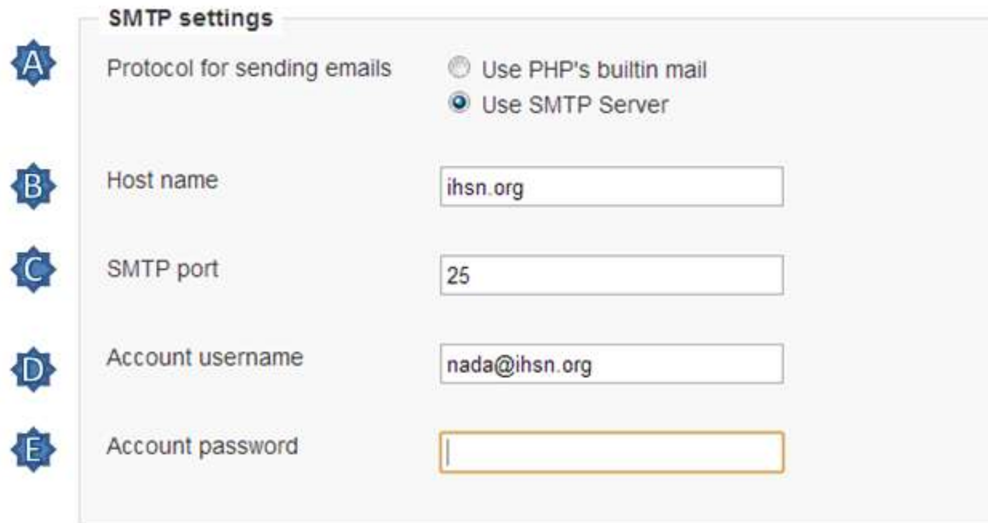
Site Login settings

A. To require that users login before being able to access the website set this option to Requires all users to login to access the website.

B. Determined how long a user will stay logged in. After this time the user will be automatically logged out.

C. Sets the minimum length for passwords created by the users at registration or for manual user creation.

SMTP Settings



A. If the PHP/web server is configured to send email using PHP's MAIL function, select the first option and don't fill in anything else.

   If your organization has a mail server and has have a dedicated account that can be setup for NADA, use the following settings: Check the radio button "Use SMTP Server"

B. Enter the host name for the server

C. Enter the port used by the server to send mail

D. If required, enter the user name used to send mail on the server

E. Enter the password used to send mail on the server

If the organization does not own a mail server, a Gmail account can be configured to be used with NADA.

- Check the radio button "Use SMTP Server"
- **Host name:** ssl://smtp.googlemail.com or ssl://smtp.gmail.com
- **SMTP port:** 465
- **Account username:** email-address@gmail.com
- **Account password:** password for the gmail account

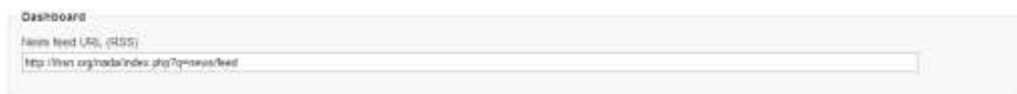
- ☞ Test the email settings

The quickest way to test if the email settings are working is to use the "forgot password" option from the user login page. If no mail is received when doing this test then go back and correct the mail settings. Check with the ISP or server administrator for the correct settings.

- ☞ Click on update to save all settings

Dashboard setting

Provides a means to automatically have content loaded into the dashboard via an RSS feed from a site. The default setting is set to receive updates and news from the IHSN website.



Uploading Studies

Files needed to upload a study include:

- A DDI 2.x xml file containing the study metadata.

  📖 The IHSN recommends the freeware **Nesstar Publisher** for preparing the DDI document. The program may be obtained from http://www.nesstar.com.

  📖 For further references in preparing a DDI compliant metadata document see: http://ihsn.org/HOME/software/ddi-metadata-editor

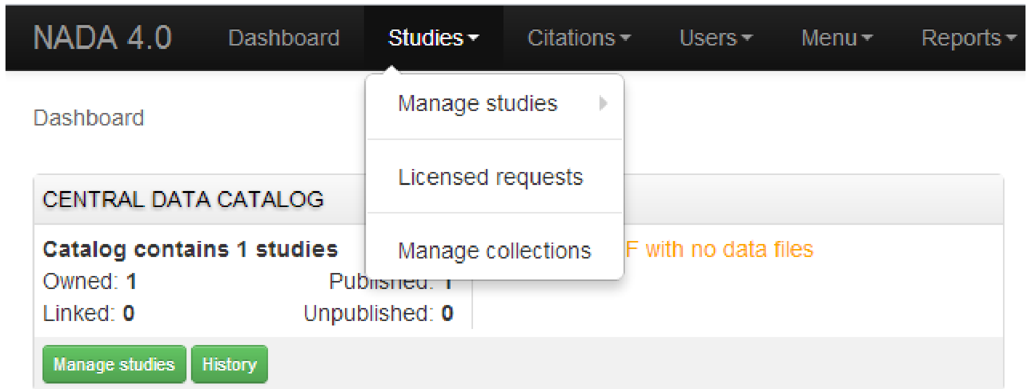
  📖 **As well as the Quick Reference Guide for Data Archivists:** http://ihsn.org/HOME/sites/default/files/resources/DDI_IHSN_Checklist_OD_06152007.pdf

- A Dublin Core , resource description file (RDF) – see the above programs and links for preparing an RDF file.

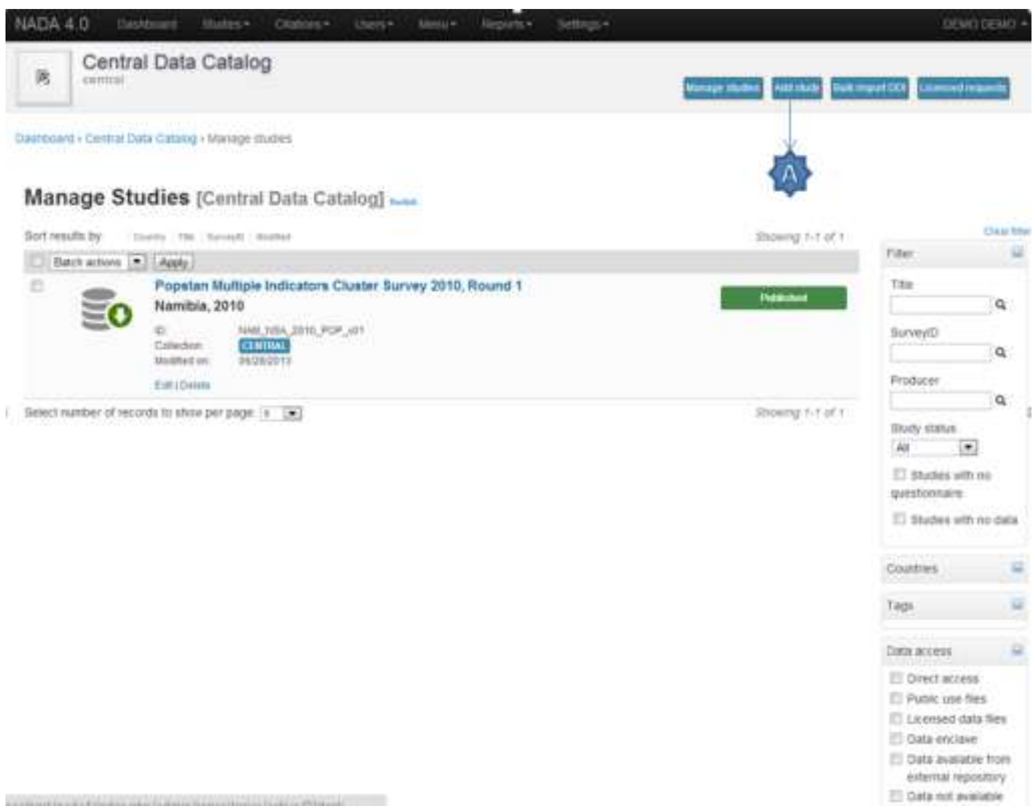
- Any documents such a questionnaires, reports and technical documents to be shared

- Any data files that are to be shared

- The URL's to any external sites that might be linked to from the study page.

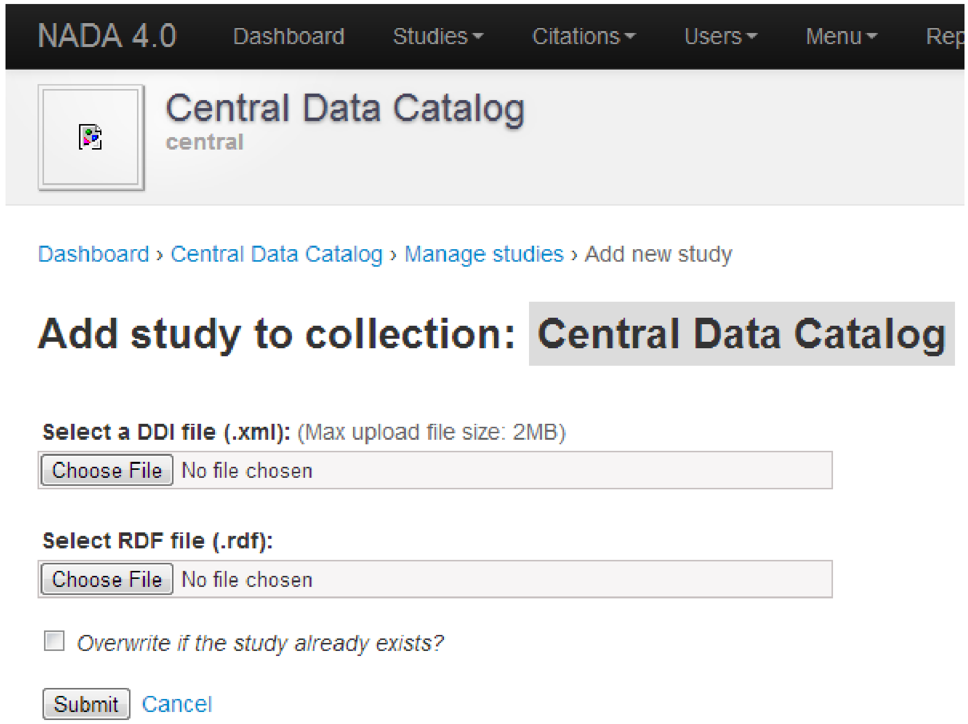


☞ From the Manage Studies link select the collection to which the study will be uploaded. Only one Collection exists in the default NADA4 installation. The Central Data Catalog.

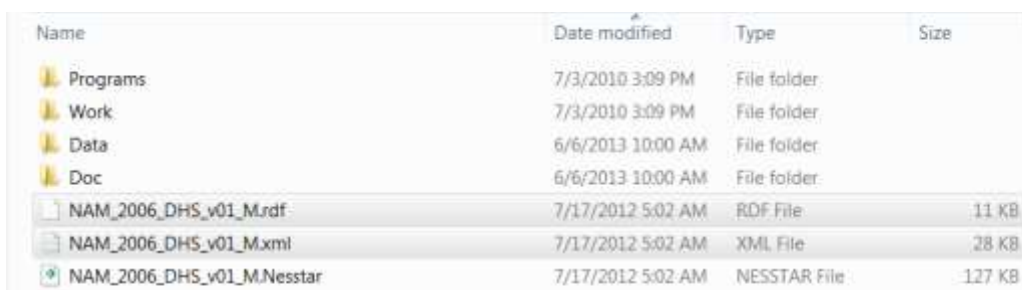


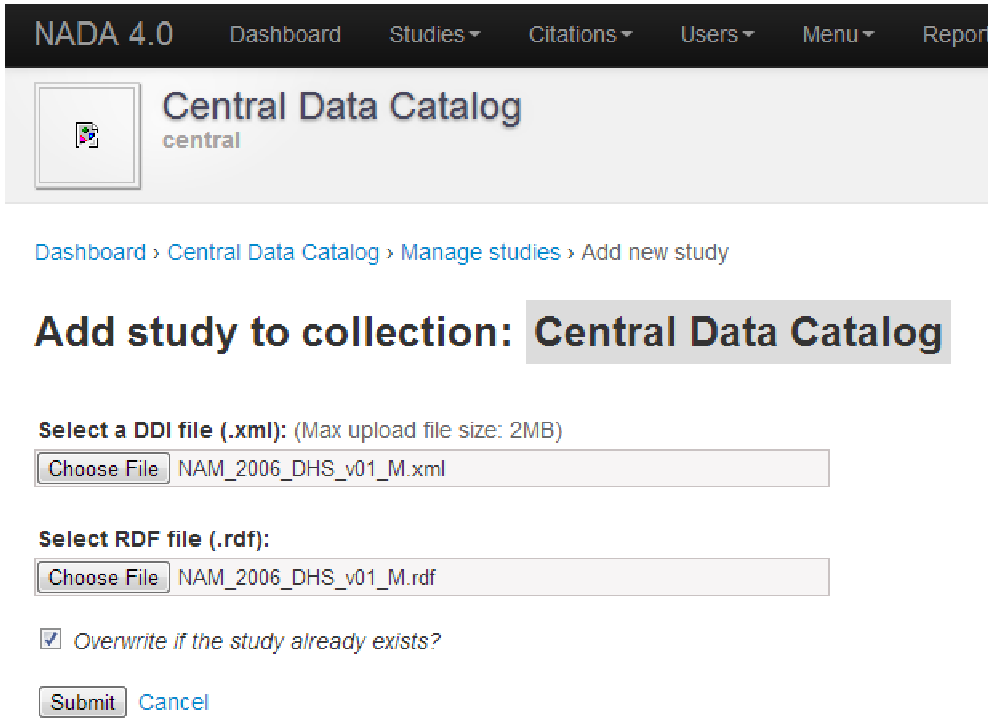
Uploading a DDI

- To add a new study: Click on the Add Study link in the top right (A)



- Select the location of your DDI and RDF files for the study to be uploaded.





☞ Select the Overwrite button if updating an existing study with the same ID. **Click submit**

Note: It is possible to upload more than one study at once using the "Bulk import DDI" link next to the "Add study" button. Simply select the DDI's you want to upload and follow the dialogue instructions. This is useful when you have many DDI's load and want to do it all in one step.

☞ The Study edit page loads.

A. Tells the administrator that this study has not been published yet and that the documentation in PDF format for this study has not been generated.

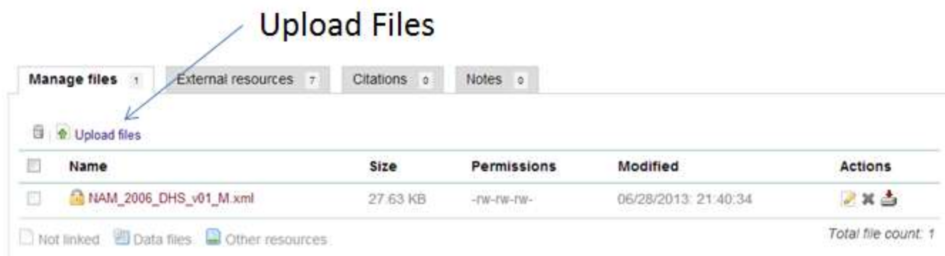
B. Is where Files (Questionnaires, reports and data) are uploaded, resource descriptions are added, citations and notes are added

C. From this area a study can be published, a data access type set, a pdf metadata document generated and links to external sites set

D. Provides a shortcut menu to some common study management taks. Including a link to browse the metadata from the frontend perspective.

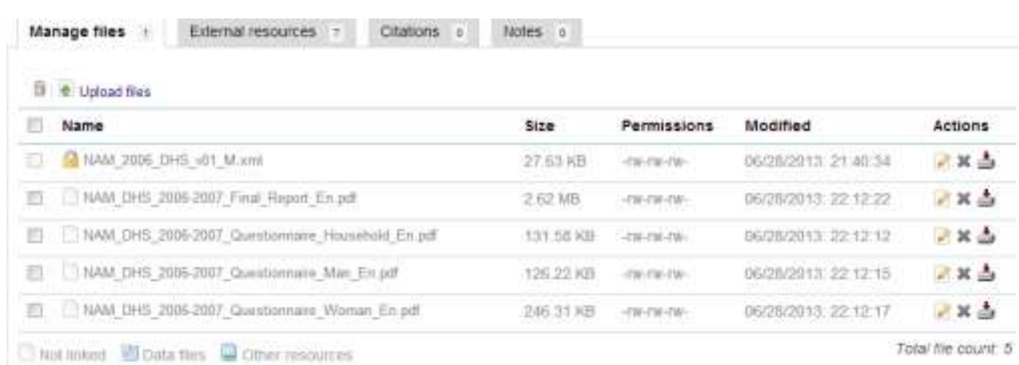
Uploading resource files and publishing

- Select the Upload files link under the Manage files tab



- The Upload External Reources page opens. Select all the external resource (questionnaire, reports etc) and data files to be shared by clicking on the Add files button. The upload tool allows for multiple files to be selected at a time. When all files are slected - click on the Start upload button. When done the page returns to the study edit page.

- The uploaded files are now visible under the Manage files tab



☞ If a RDF file was uploaded when the DDI was uploaded in the first step then the next step is to link the RDF descriptions to the newly uploaded files. This describes them to the system as document types, such as Questionnaire, Report, and Technical Documents. This is necessary before a file becomes available for download from the frontend.

☞ To link the RDF with the uploaded files click on the **Link Resources** link under the Survey Options menu at the top right.

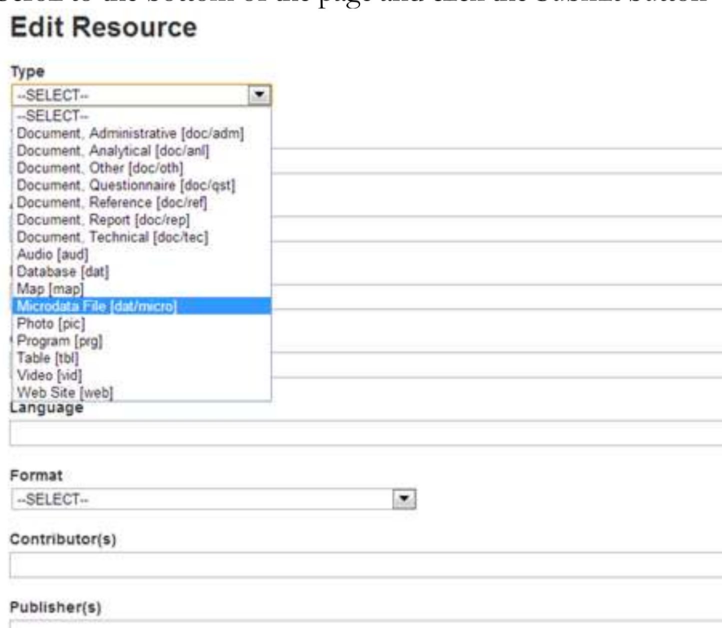
☞ The External Resources tab opens and if the linking was successful a green link appears next to each successfully linked resource.

Title	Link	Resource type	Modified	Actions
2006-07 Namibia Demographic and Health Survey (NDHS) - Fact sheet	✔	Document, Report [doc/rep]	06/28/2013	Edit | Delete | Download
2006-07 Namibia Demographic and Health Survey (NDHS) - Policy brief	✔	Document, Other [doc/oth]	06/28/2013	Edit | Delete | Download
Namibia Demographic and Health Survey 2006-07 - Final Report	✔	Document, Report [doc/rep]	06/28/2013	Edit | Delete | Download
Namibia Demographic and Health Survey 2006-07 - Key Findings	✔	Document, Report [doc/rep]	06/28/2013	Edit | Delete | Download
NDHS III - Household Questionnaire	✔	Document, Questionnaire [doc/qst]	06/28/2013	Edit | Delete | Download
NDHS III - Man's Questionnaire	✔	Document, Questionnaire [doc/qst]	06/28/2013	Edit | Delete | Download
NDHS III - Woman's Questionnaire	✔	Document, Questionnaire [doc/qst]	06/28/2013	Edit | Delete | Download

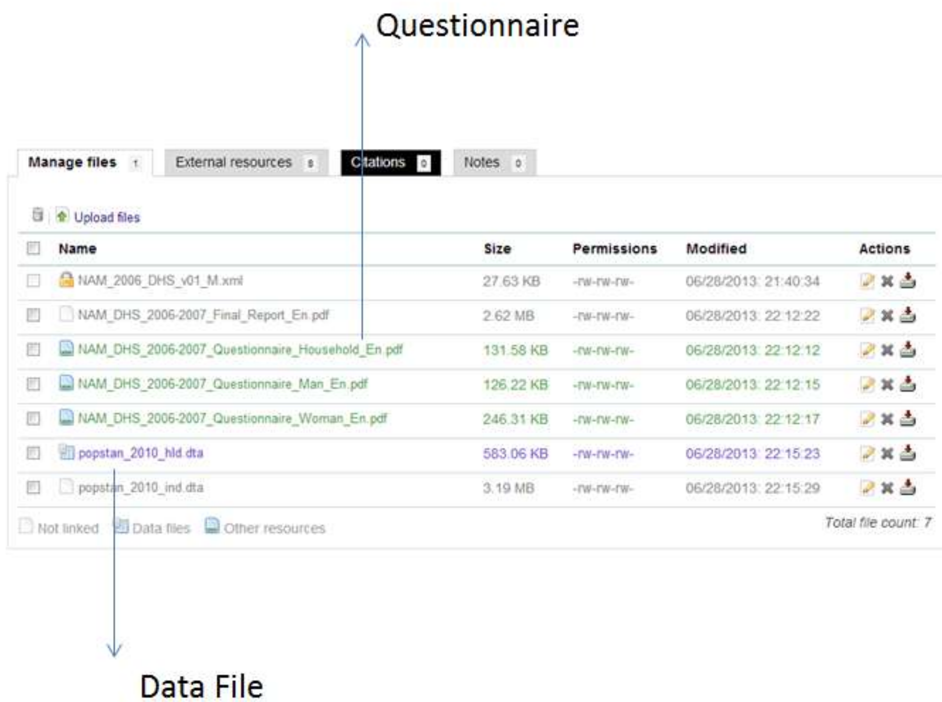
☞ To manually add a description to an uploaded file click on the file name in the Mange Files tab. The Edit Resource page opens. Fill in the file details – the most important fields are the Type and Title boxes.

- **This manual edit step is necessary for all data files that are to be shared. For a data file select Microdata File [dat/micro] from the Type dropdown box. Then fill in all other appropriate fields**.

- Scroll to the bottom of the page and click the Submit button



☞ Data Files display in the Manage Files tab as purple text. Questionnaires and other external resources as green text. Files listed in grey (except the .xml file with the yellow lock next to it) are undefined. Click on the file name to assign them as resource types or data –as above.



Publishing a study

Before publishing the study four more steps need to be covered. These involve setting an access type for data that are to be shared, generating a pdf metadata document, providing links to any external sites related to the study and publishing the study.

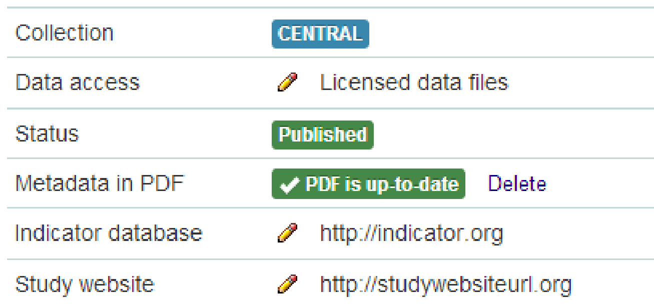
A. Click on the next to "Data Access" and select the appropriate data access type for the data. Click update.

B. Click on the Generate PDF link to generate the metadata in PDF.

Edit any fields and select the Report details. **Note: for studies with many hundreds of variables you will need a powerful server and the process may take a long time.** Click generate PDF

C. If available edit the Indicator database link and put in the URL which points to the indictor database for this study – DEVINFO, NESSTAR SERVER, SUPERCROSS etc. Edit the Study website link to enter a link to a website link for the survey.

D. Click on the Browse metadata link at the top right of the page in the Survey Options box to review the site and when satisfied. Click on the Status link to immediately publish the study

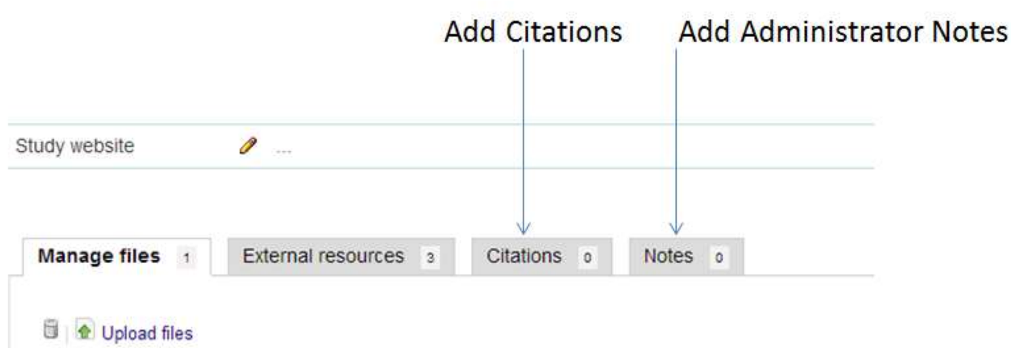


The Study is now published and is visible to the users on the frontend.

The remaining tabs :

- Citations - provide a means for the administrator to enter citations of publications (journals and working papers etc) that used the study.

- Notes - provides a place for administrators to enter notes about the study. These notes could be notes to remind and administrator of things still to be completed for this study or notes about decisions made or who to contact about the study within the organization. The fields are open ended.



- To Delete a study use the Delete Study link on the right of the study information page or use the delete link on the manage studies list page either directly or through the batch actions box.

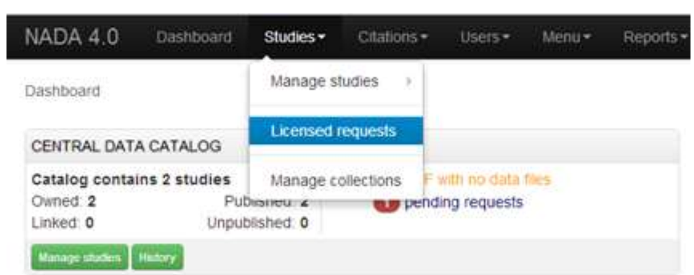
Managing Licensed Requests

Datasets that are assigned the Access Type **Licensed** require approval from the NADA administrator before the user can get access to the data files.

From the site administration there are a number of ways to see if any licensed requests have been received.

- Go to the dashboard. Pending requests show up as red in the catalog quicj summary section. Clicking on this link goes to the Licensed Survey Requests management page.

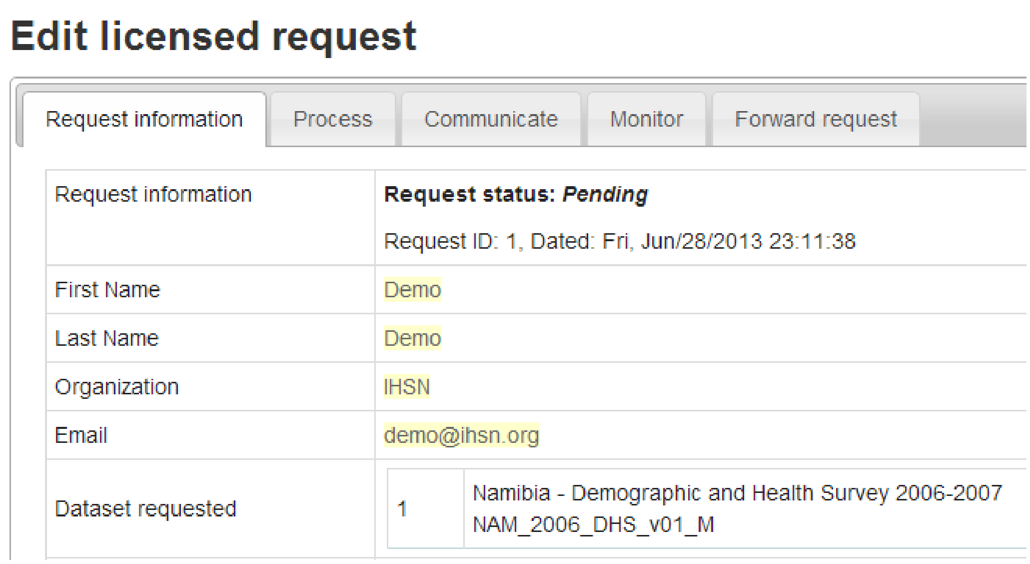
- Or go to the Studies link on the top menu and select Licensed Requests from the submenu.



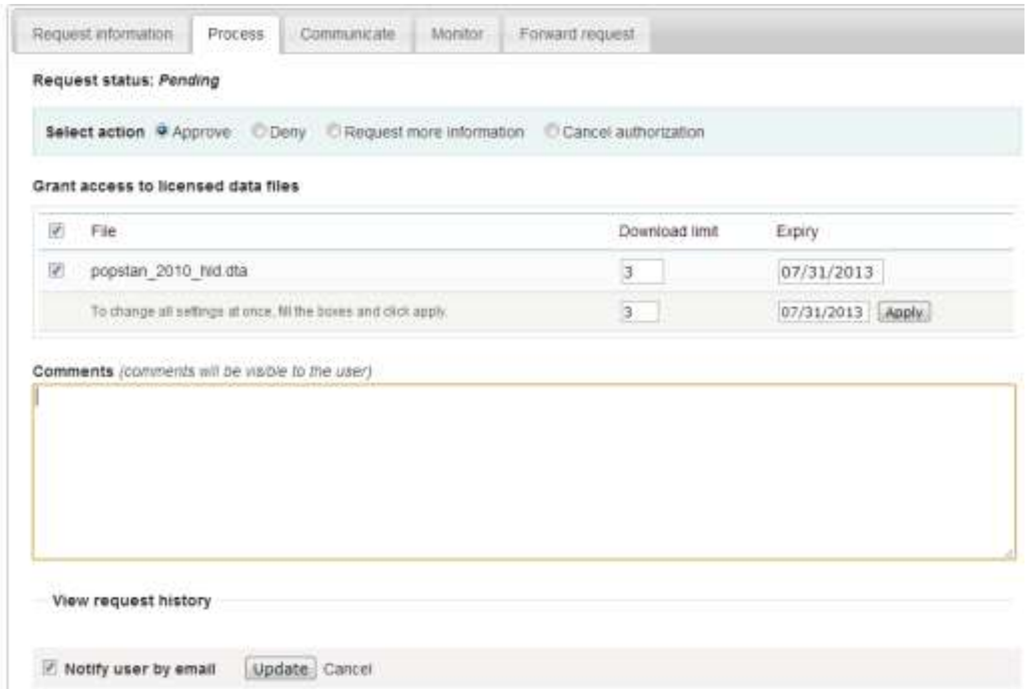
The link shows a page with a list Licensed Requests received. The status column indicated the Pending requests.

☞ Click on the Edit link for to process a request.

The Request information tab shows a summary of the information provided by the applicant.



☞ To Approve or Deny or request further information for the request. Click on the **Process** tab.



☞ Select Approve to approve the request. (other options include Deny as well as Request more information from the applicant).

☞ Select the files that the user will be authorized to download – it is also possible to enter a maximum number of downloads and expiry date for downloads.

☞ Enter any comments to be sent to the applicant

☞ Select Notify user by email to notify them that the application has been processed.

☞ Select Update.

The remaining tabs:

- Communicate - provides a means to ask for more information from the applicant
- Monitor – allows the administrator to see when and how many times the applicant downloaded the data
- Forward Request – provides a means to forward the request to another person for review.

Collections

Collections are sub categories of the Central Data Catalog. They allow administrators of a NADA instance to group studies into what can be thought of as sub-catalogs of the Central Data Catalog.

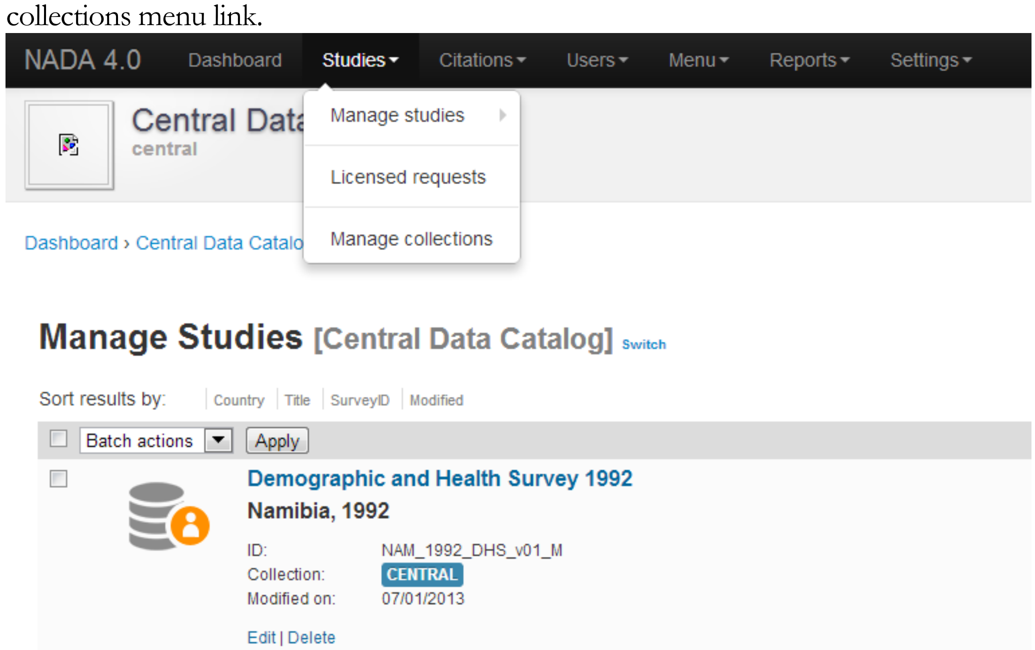
Collections provide a number of benefits both from the user and the administrator perspective. From the users' perspective, being able to filter and view groups (collections) of studies that logically belong together makes finding what they are looking for easier. From the administrators' perspective, the ability to create collections of studies that may logically belong together facilitates the ability to decentralize the management of each collection of studies to specific administrators (for example collections can be managed by different departments in an institution).

- NOTE: The creation of collections will in general only be useful and necessary for large catalogs or for catalogs that desire more decentralized management of groups of studies by different departments.

Creating collections

- Login to the Site administration using an administrator password.

- Collections are managed and created by going to the Studies, Manage collections menu link.



☞ There are no collections defined in the default NADA 4 installation.

☞ To create a new collection click on the Create new collection button.

A. Under **Collection Identification,** provide a short name for the collection. This will become the URL for the collection so pick carefully. For **Title,** fill in the fill title for the collection. This will be the name displayed at the top of the collection page.

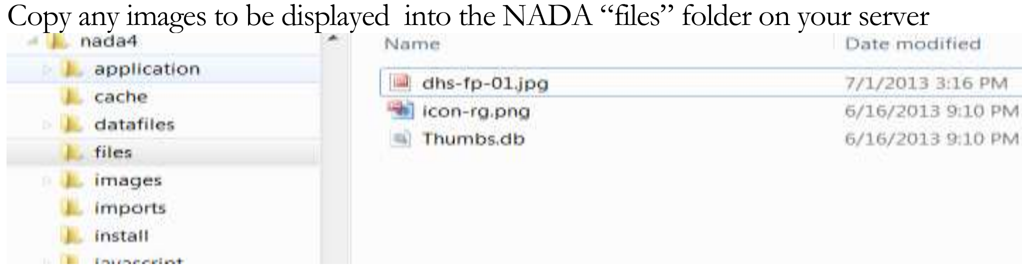
B. Fill in a 3 or four line short description of the collection. This text will display on the front end in the collections list. For examples see: http://microdata.worldbank.org/index.php/contributing-catalogs

C. Fill in a more detailed description of the collection. This will display on the About page for that collection. For example see: http://microdata.worldbank.org/index.php/catalog/dhs/about

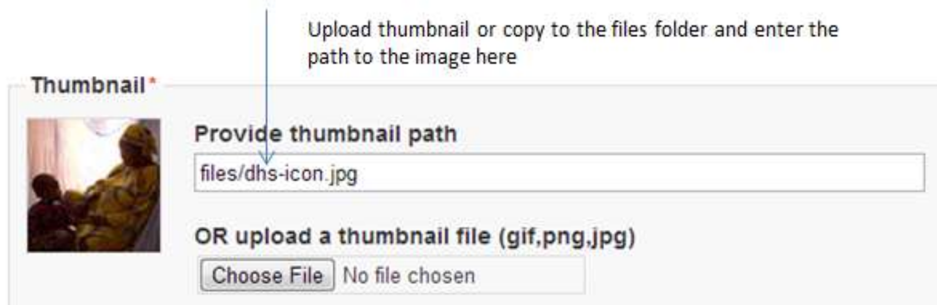
To format the page and include images it is possible to enter HTML code into this box: below is an example piece of code that includes an image.

```
<img src="files/dhs-fp-01.jpg" alt="Health Surveys Image" class="about-photo">
<h2> Health Surveys Collection</h2>
<p align="justify">The Health Surveys collection aims to provide frequent  high quality and
timely health data needed by the decision makers when designing  public health programs.</p>
<p>Health surveys provide useful information on health status and health consumption and their
determinants.</p>
```

Copy any images to be displayed into the NADA "files" folder on your server



D. Upload a file to display next to the collection as it is listed on the collection page. **NOTE: This image should be 82 X 82 pixels.** If the upload does not work automatically then copy the thumbnail image to the "files" folder as shown above.

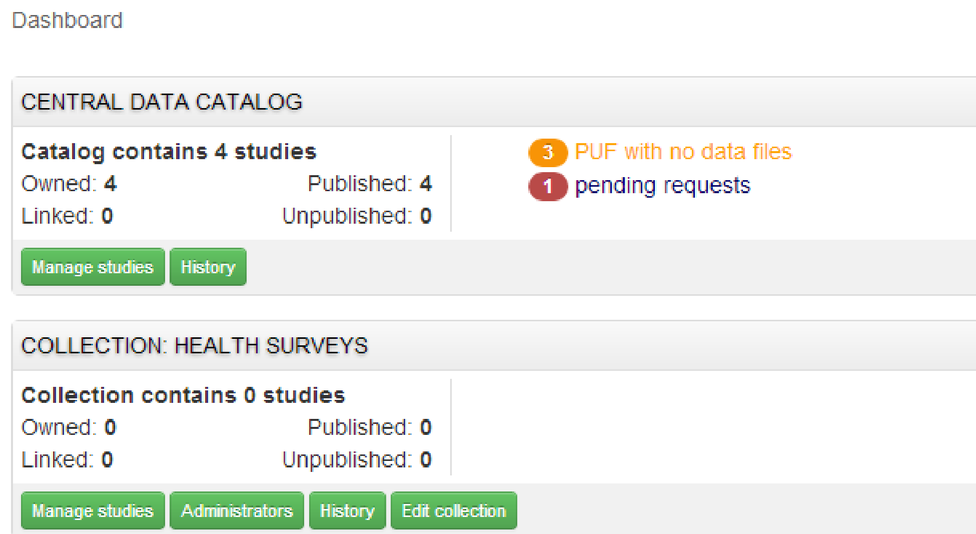


E. The **Weight** field determines in what order collections are shown in the collection list. 0,1,2,3 etc.
The **Select collection** type drop-down is a system value to distinguish between collections that should be viewed as internal to the organization or external. For example, some collections may be made up entirely of studies from an organization outside the host catalog. These collections can be designated as external. The **Section** dropdown allows for the categorization as either a collection based on a specialized collection (like health) or based on a regional breakdown. Selecting **Publish** – publishes the collection.

☞ Click on Submit to save the changes.
To view the results click on the Preview link on the far right:

- ☞ The new collection now also shows in the collection list on the Central Catalog About page (this is where the thumbnail and short description fields are displayed).

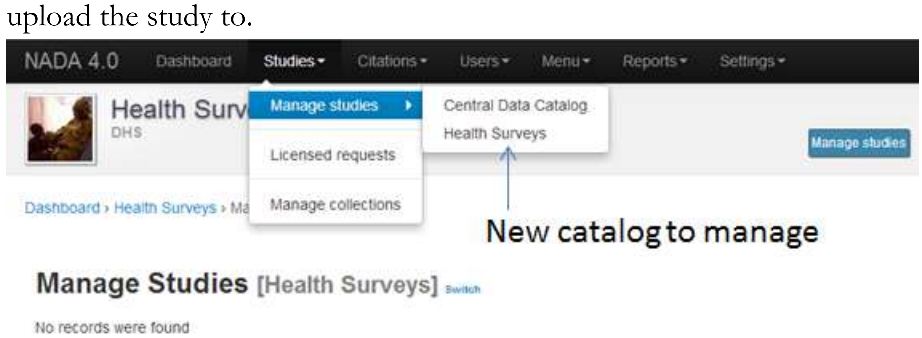
☞ Visiting the Dashboard will now also show the new collection listed below the Central Data Catalog. With a number of green buttons as shortcut links to manage the studies on the collection, assign administrators for the collection, a history of activity on the collection and a link to edit the collection as in the steps above.



Manually adding studies to a collection

There are 2 ways to get studies into the new catalog:

☞ The first is to upload a DDI and all its resources to the collection in the same way as described in the earlier section – **Uploading a Study**. Except instead of choosing Central Catalog chose the collection you want to upload the study to.



- Click on the Add Study button and upload a DDI and RDF and all your resources as described in the earlier section – **Uploading a Study**

- Once a study is added in this way it displays in the Manage Studies list. Notice that the collection summary field shows that the study belongs to (is **Owned By**) the DHS collection (this was the Short name defined in the example when the Health Surveys Collection was created).

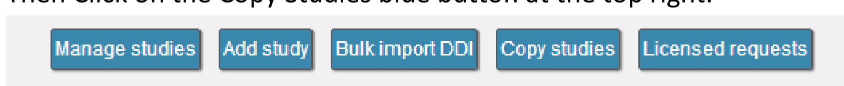
Also, note that the new study also appears in the Central Data Catalog

All studies uploaded to collections will automatically be added to the Central Data Catalog in order to build a common search portal for all studies.

Copying studies from one collection to another

- The second way to add a study to a collection is to **Copy the study** from another collection into the new collection.
- **To copy a study already in the catalog to display in the new collection first make sure to be in the Manage Studies section for the collection you want to put studies into.** To do this either use the Studies – Manage studies menu on the top or simply click on the Switch link next to the Manage Studies [Collection Title] heading.

- Then Click on the Copy Studies blue button at the top right.

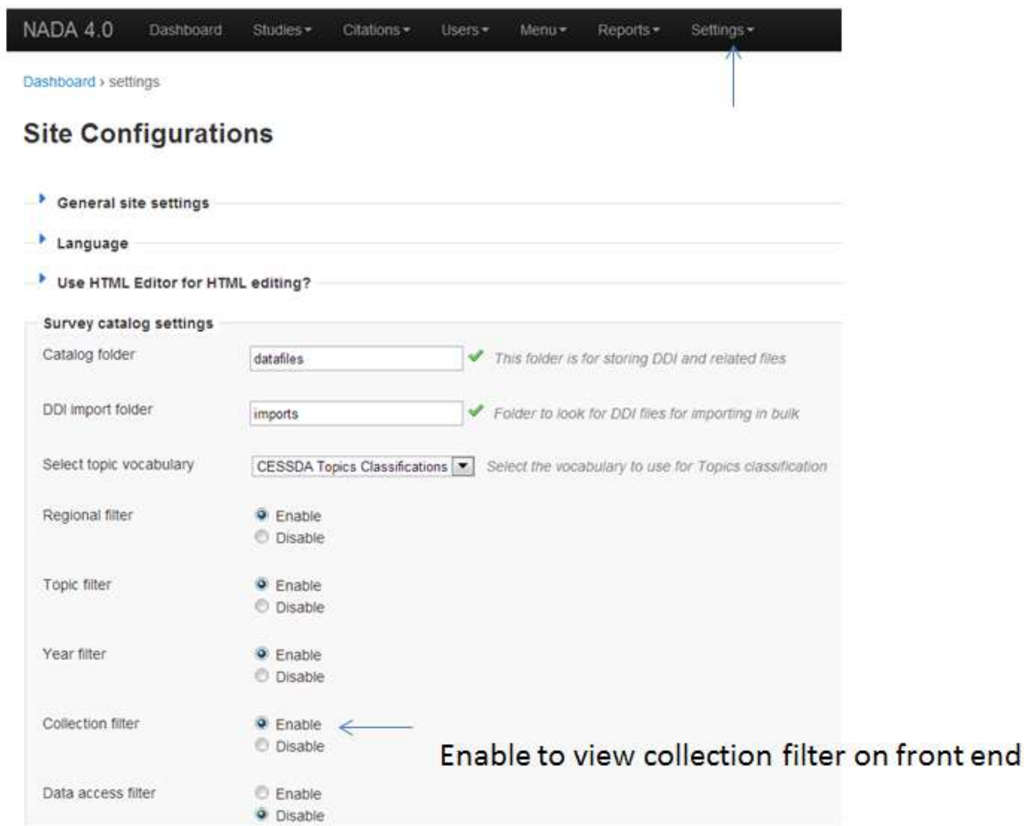


- A list of all studies available to copy to the new collection is listed. Simply click on the Link button in green to copy the study to the collection. The button will turn red and say Unlink. To reverse the process and click the now red button.

- ☞ Going back to the Manage Studies page for the collection will show the newly copied studies in the collection list. Also note that the Collection field now indicated DHS next to Central. DHS is in **grey** to indicate it is **not owned** (it is a copy) by that collection and the Central is in blue to show it **is owned** by the Central Data Catalog. Also note that because the study is not owned by this catalog it cannot be edited from this catalog – hence the publish\unpublish green button is absent for the copied studies

Turning on the collection filter

The final step after creating the first collection is to enable the collection filter option in the Settings menus under Site Configurations – Survey catalog settings

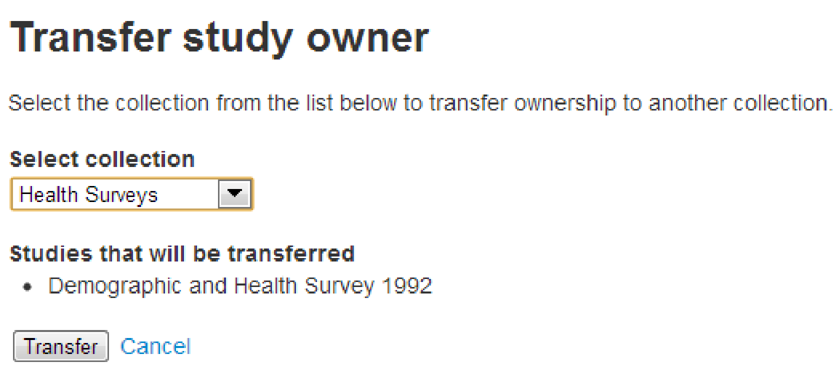


Transferring study ownership

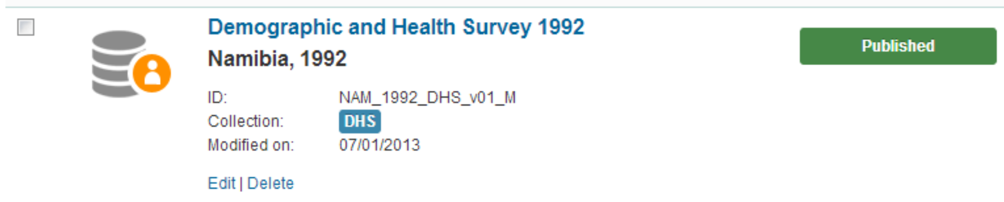
In the previous examples mention was made of studies uploaded to a catalog being owned by that catalog. There may be cases where transferring the ownership from one catalog to another will be desirable. This will become clearer in the next section on user roles but for now the next steps show how transferring ownership from one collection to another can be done.

- Transferring ownership from one collection to another has to be done by the owner of the collection and from the collection it is currently owned by.
- To transfer ownership Go to the Manage Studies screen and select the study to be transferred. Open up the Edit Study page by clicking on the study Title.
- On the right hand side of the screen click on the Transfer study owner link.

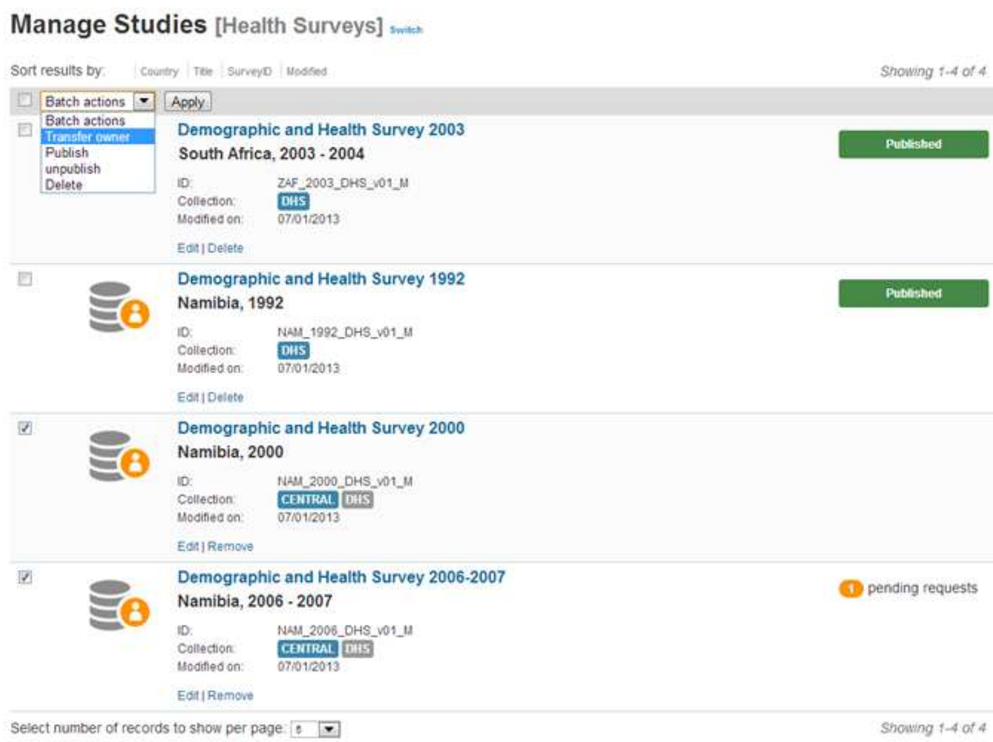
- Select the collection to transfer **from** the dropdown box.



- Click Transfer
- Note: that when looking the study summary for the transferred study the Collection field now shows the study to belong (**owned by**) to the DHS collection and not Central anymore. Also note the option to Publish and unpublish is now active.



- To transfer ownership of a large number of studies all at once - from the Manage Studies page – select the studies to be transferred (tick them in the box left of each study) and then from the top **Batch Actions** drop down, select Transfer owner – then apply.



Managing Users and account types

Users in the NADA can be defined according to three broad groups:

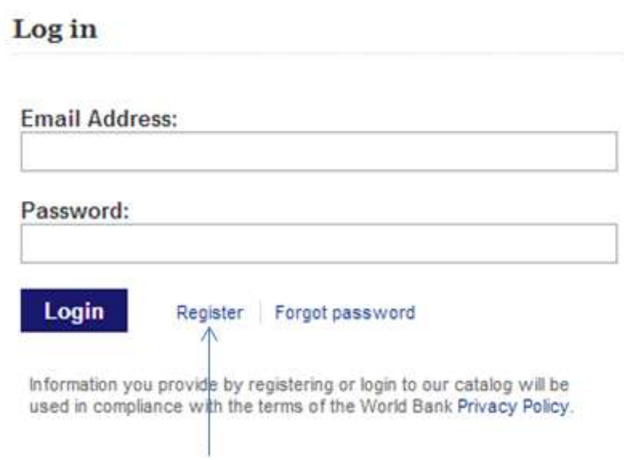
- **General Users** – this is the normal user who registers on a NADA site from the user interface. This user type has no access to the site administration. It is required to register as a user before being granted access to public use and licensed data types.
- **Site Administrators (unlimited)** – this user has access to all functions and all collections within the Site Administration. System wide access.
- **Limited Administrators** – these administrators have access to a limited set of functions within the Site Administration. Examples would be an administrator

of a specific collection\s, or licensed survey reviewer for all or only some collections, or report generator, or citation manager etc.

Creating User accounts

User accounts can be created in two ways:

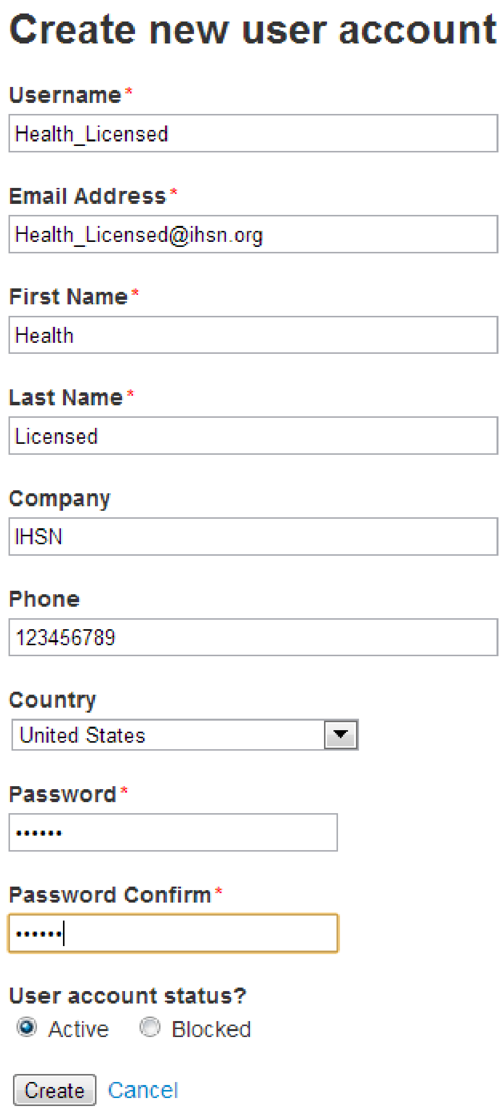
- A General User account can be created by a user directly from the register screen from the login link on the user interface of the application.



  The user created by this process has no access to the site administration. This account can only be used to apply and gain access to public and licensed datasets.

- A user account can also be created by a Site Administrator. To do this login as a Site Administrator and go to the site administration section of the application.
- Select Users – Add user from the top menu.

- Fill in the information for the user in the form and be sure to mark the account status as Active. Then click the Create button.



- Note that the user always starts off as a General User with no access permissions to the Site Administration. The user group column displays as empty for users with only general user accounts.

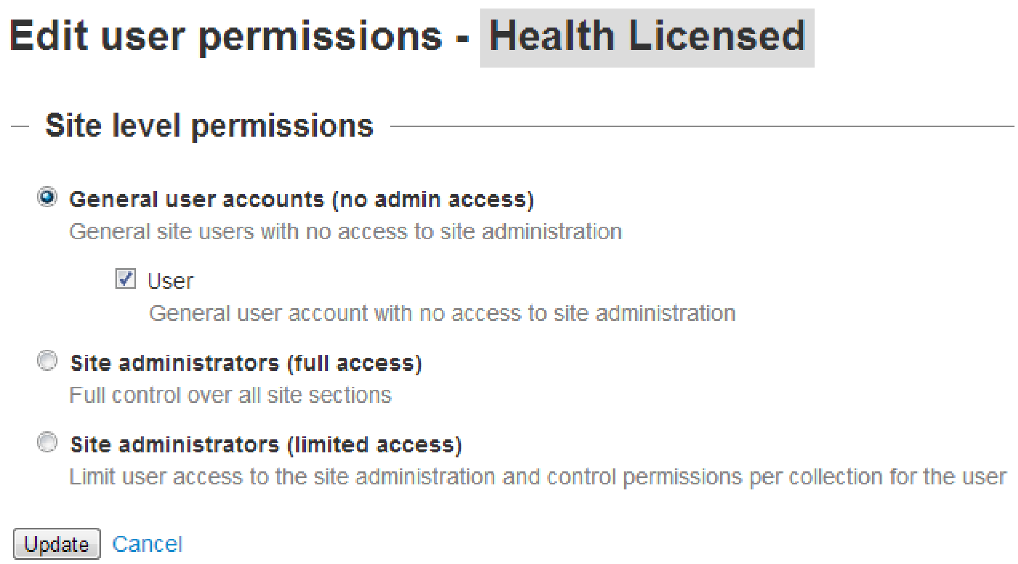
- To see a list of all users in the system go to the Users – All Users menu item at the top of the screen.

- **Note: the new users created have no User group assigned (they are general users). Also note the Actions column on the far right. From these links an account can be edited (including changing the password and blocking an account), deleted and Permissions managed for the account.**

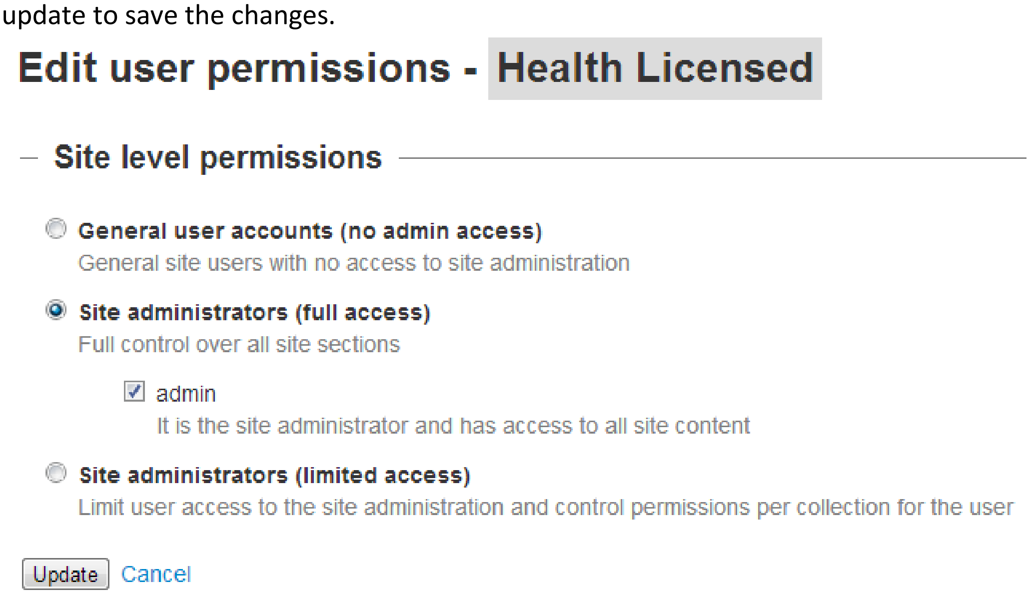
Managing User Account Permissions

User accounts permissions can be only be set and changed by a **Site Administrator.** To change the permissions for an account:

- Click on the Permissions link next to the account to be changed. All accounts start of as General users accounts

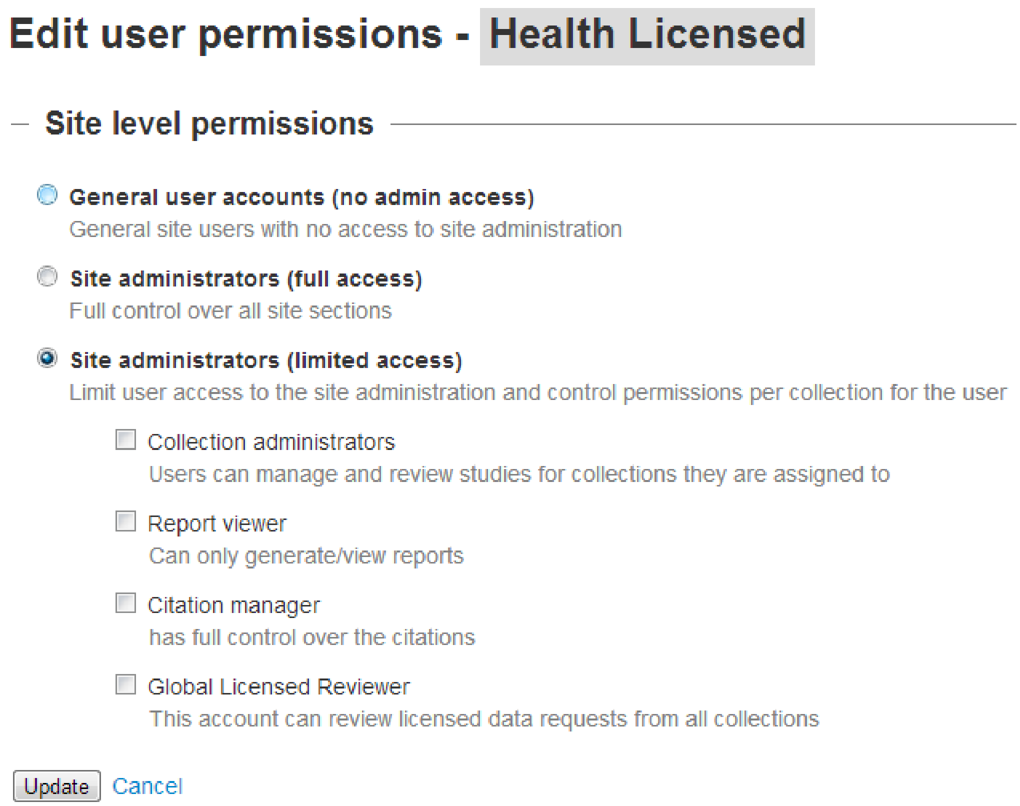


- To change this user to a full site administrator who will have full system wide access to all parts and functions of the NADA administration select the Site administrators (full access) option and tick the admin box as well. Click update to save the changes.



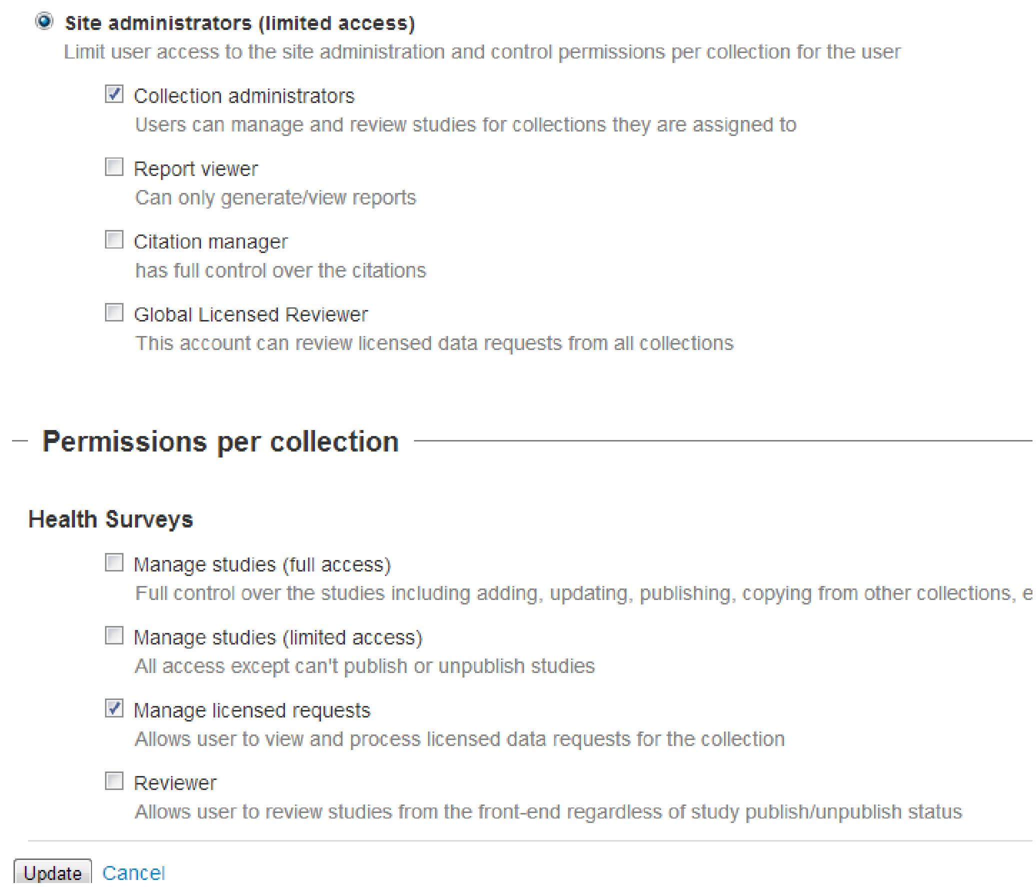
Collection level administrators

- To create a user who only has permissions to administer studies or administration functions for a particular collection. Select Site administrators (limited access)



- It is then necessary to assign a role to this new limited administrator account. To create a limited access administrator **for a particular collection** – select Site administrators (limited access) and then select **Collection administrators**. Notice: The form expands to reveal a list of collections in the system.

- Select the appropriate level of access that this account will have for this collection. In the example below an administrator is being created who can manage **only licensed requests** for the collection – Health Surveys. This account will not be able to upload or publish studies. The account will only be able to process licensed requests for the collection – Health Surveys.



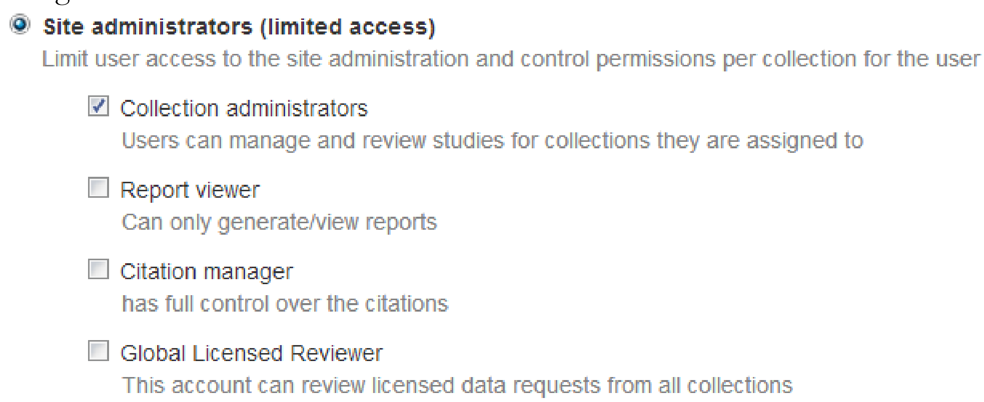
Other levels of access for Site administrators (limited access) – Collection administrators include:

- Accounts that are given full access to manage studies
- Accounts that are given access to upload studies **but not publish them**
- Accounts that are limited to reviewing studies.

Global level Limited access accounts

Other types of limited access accounts include:

- Accounts that can only view system reports at a global level.
- Accounts that can only access the citations section and manage citations
- Accounts that can only access the Licensed Request management system – at the global level for all collections.

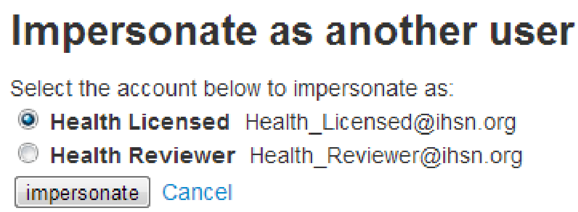


Impersonating a user

The system includes a function that allows a Site Administrator to **impersonate** (take on the role) a user created in the system. This is a useful testing tool when creating users and assigning permissions. It essentially allows the administrator to take on the role of another user temporarily.

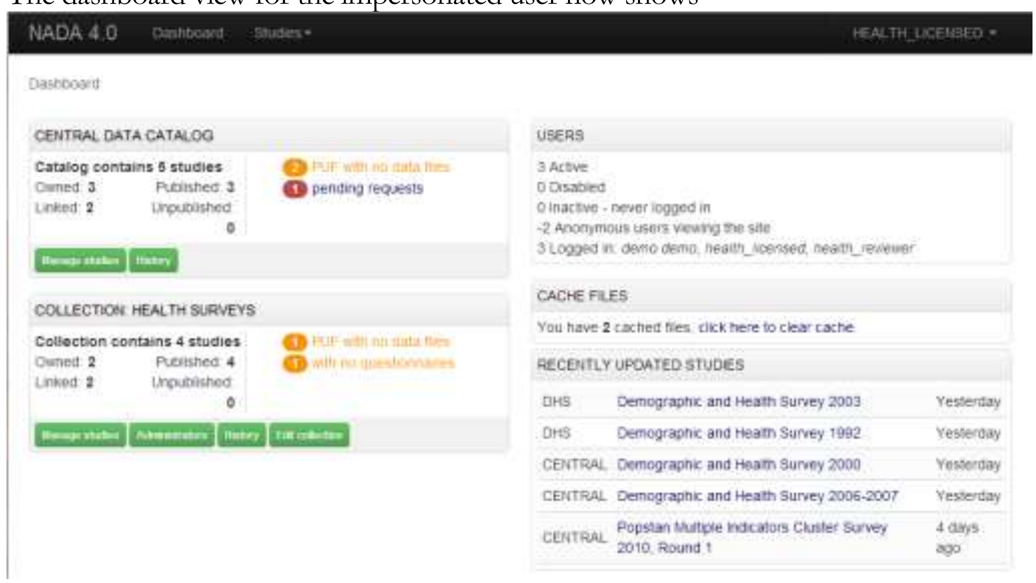
- To access the Impersonate User feature go to the Users – Impersonat user menu at the top of the screen

☞ A list of users to impersonate is shown.



☞ Select the user to impersonate and click on the impersonate button.

☞ The dashboard view for the impersonated user now shows



☞ Note in the example above the account being impersonated is a Limited Account administrator with rights only to manage licensed requests for the Health Surveys Collection. Note that all other dashboard menus are either hidden or clicking on any other function other than manage studies results in an access denied message.

☞ This is a good way to test if the roles assigned to a user account have the expected results.

- To exit the impersonate mode and return to the Site Administrator role – Click on the top right menu and select Exit impersonate mode.

The Reviewer Limited access account

Sometimes it is desirable for catalog administrators to allow certain users to see a collection before it is published but without granting access to the site administration functions.

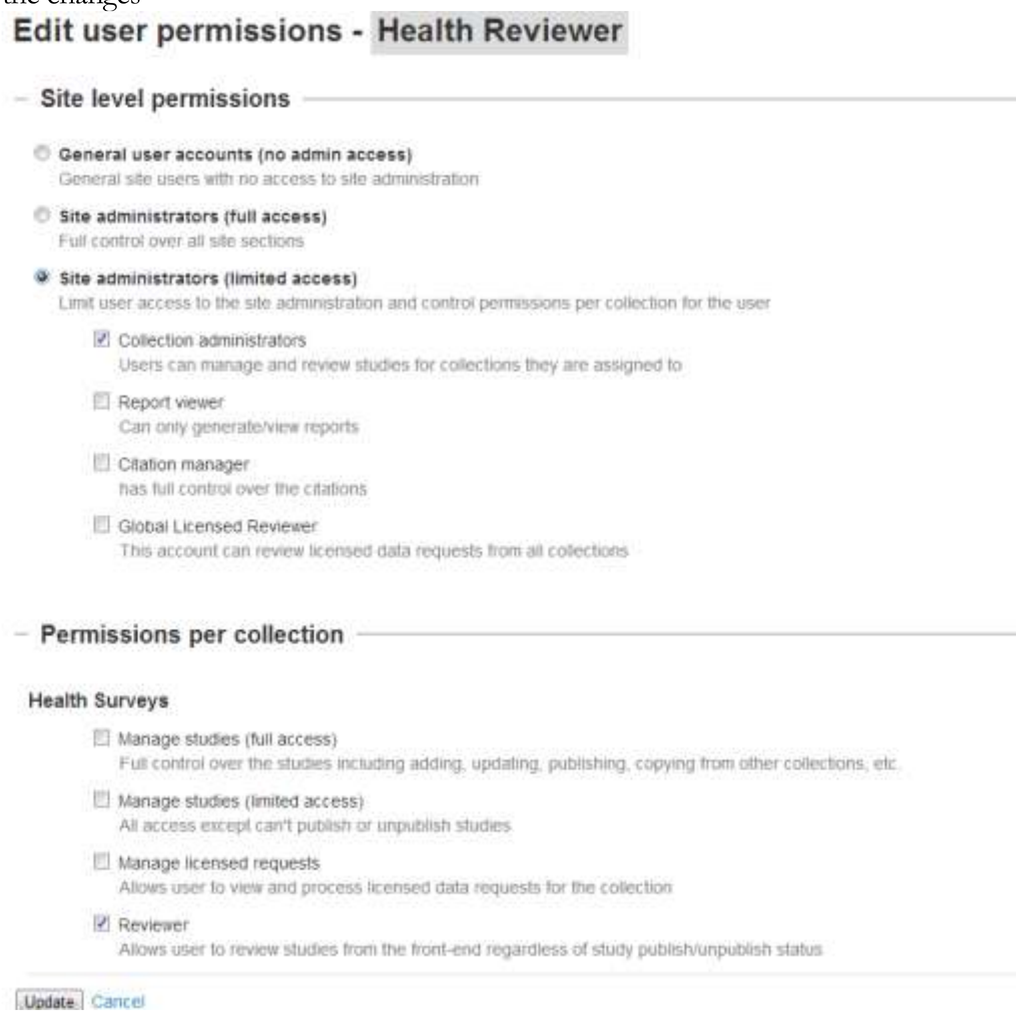
This is useful for getting feedback on the correctness of information on collections or studies before publishing.

To do this:

- First create an account for the user or get the user to create an account by using the register form on the login screen.

- Then edit the permissions for that user selecting Site Administrator (limited access) – Collection administrator

- Then for the appropriate collection select Reviewer and click update to save the changes

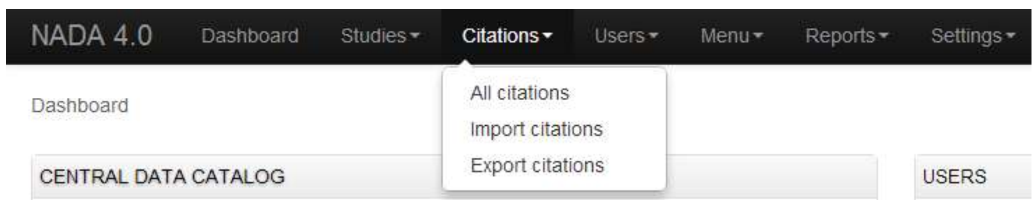


- The newly created reviewer account user can now view all studies in a collection even if the study or collection is unpublished.

Citations

The Citations section is where bibliographic references can be added for publications that use any of the studies in the catalog. These citations can be linked to particular studies in the catalog and are displayed to the users of the system in the study information view of the relevant study.

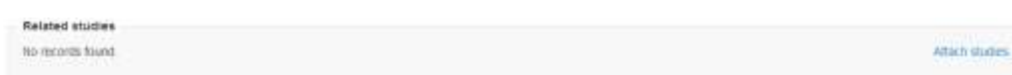
Citations are added from the Citations menu.



- ☞ To add a citation - click on **All citations** then click on the **Add New Citation** button at the top right.

- ☞ Compete the form including the indication as to whether the citation should be published or not.

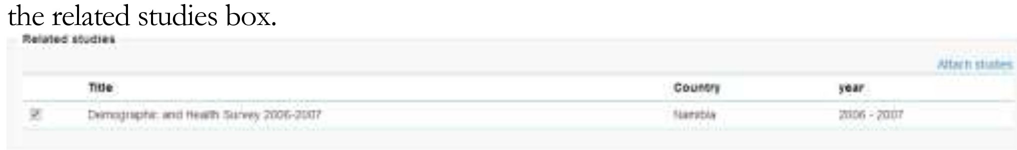
- ☞ Then expand the Related studies link to tell the system which studies the citation “belongs” to.



- Click on the Attach studies link. This reveals a list of all studies in the catalog.

- Select the relevant studies by clicking on the green Select button.

- Click on the apply filter button to save the changes. The study now appears in the related studies box.

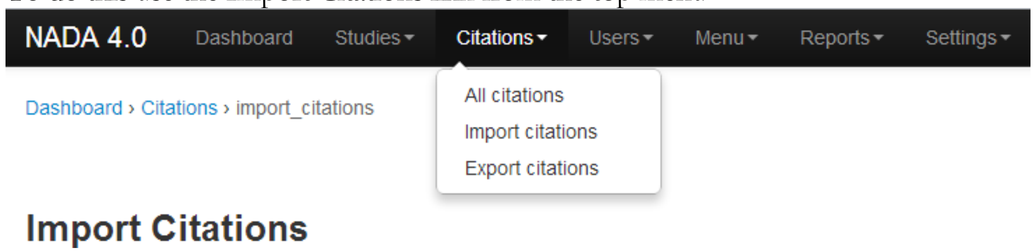


- Click on the submit button to save the citation.

- Note: the flag, keywords and notes fields can be used by administrators to place extra notes only visible to other administrators that might prove useful when there is uncertainty about a citations appropriateness or accuracy.

- It is also possible to import citations in common citation formats such as BibTex and EndNote (RIS).

- To do this use the Import Citations link from the top menu



- Paste the BibTex or RIS text into the form and then at the bottom of the screen click on Attach studies to link the citation to a particular study in the catalog.

- The citation now appears in the citation list as well as on the study information page for the relevant studies.


Citations
All fields
Search
Batch actions
Apply
Showing 1-1 of 1
Type
Title
Date
Published
Created
Modified
Actions
Journal Article
Young people's sexual health in South Africa: HIV prevalence and sexual behaviors from a nationally representative household survey
2005
07/02/2013
07/02/2013
Edit | Delete
Select number of records to show per page:
Showing 1-1 of 1
Owner name
Related studies are attached
No related studies are attached
Entry has notes
Flagged

Creating Menus and pages

The NADA has a small content management component that allows for the creation of menu pages to appear on the user interface.

- Examples of menus that might be useful for users of the site might be: A page dealing with the dissemination policies of the organization or perhaps a page with contact information for the information.

New menu items and pages can be created via the Menu- All pages menu link at the top of the Site Administration page.

- Select **All pages** from the menu.

- To add a new page click on the Add New Page button
- Give the page a Title in the Title field
- Clicking in the URL field will automatically suggest a name for the page in the URL
- Enter the contents for the page in the Body section. Plain text or HTML is accespted by this field.
- Then indicate if the page should be published or not in the Publish dropdown

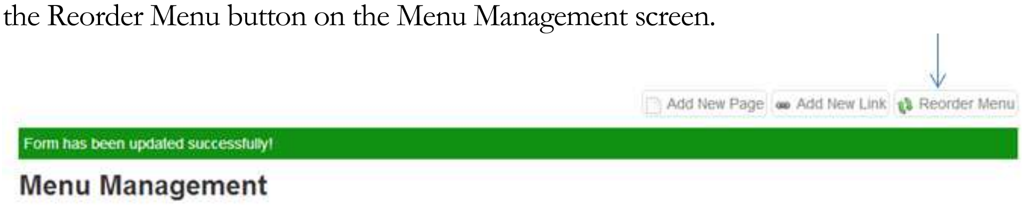
- The Weight field tells the NADA in what order this menu item should display. E.g. 0 would be first, 1 second and 2 third.

- Click on Update to save the changes.

- View the changes from the user interface: In this Example a Contact Us page was created.

- It is also possible from the Menu Management screen to add a menu link that links to an existing page on another site (rather than creating a page itself).

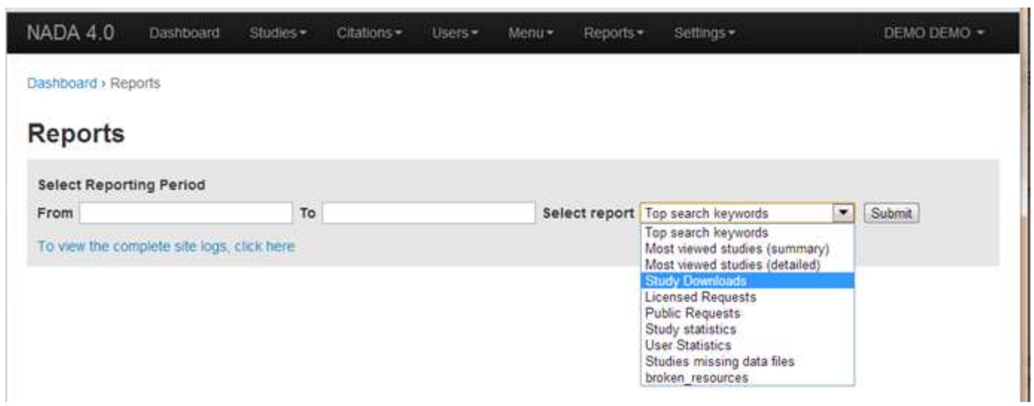
- To change the order in which the menu items display on the user interface, use the Reorder Menu button on the Menu Management screen.



Generating Reports

The NADA has a built in reporting function. To access statistics on downloads number of users, data requests, study views, top keywords used in searches etc. Click on the Reports – All Reports menu on the top menu bar of the Site Administration.

- ☞ Select the time period for which the generate the report and select the type of report from the dropdown box.



- ☞ All study reports may be exported to Excel.