# nada Documentation

Release 4.0

IHSN

February 07, 2014

Contents

NADA is an open source microdata cataloging system, complaint with the Data Documentation Initiative (DDI) and Dublin Core's RDF metadata standards. It serves as a portal for researchers to browse, search, compare, apply for access, and download relevant census or survey datasets, questionnaires, reports and other information.

Project home page: http://www.ihsn.org/nada

Documentation topics:

### **Requirements**

NADA requires PHP and a MySQL database at minimum.

### **1.1 PHP requirements**

The minimum required version is PHP 5.2 but we strongly recommend that you use PHP 5.3 or 5.4. The following PHP extensions are required for NADA:

- xsl
- xml
- mbstring
- mysql or sqlsrv

Note: See section on PHP configurations for configuring your server for NADA.

### **1.2 Web Server requirements**

- Apache 2.x
- IIS 6/7.x

### **1.3 Supported Databases**

- MySQL 5.x
- Microsoft SQL Server with fulltext support

### Installation guide

### 2.1 Requirements

NADA requires PHP and a MySQL database at minimum.

### 2.1.1 PHP requirements

The minimum required version is PHP 5.2 but we strongly recommend that you use PHP 5.3 or 5.4. The following PHP extensions are required for NADA:

- xsl
- xml
- mbstring
- mysql or sqlsrv

Note: See section on PHP configurations for configuring your server for NADA.

### 2.1.2 Web Server requirements

- Apache 2.x
- IIS 6/7.x

#### 2.1.3 Supported Databases

- MySQL 5.x
- Microsoft SQL Server with fulltext support

# 2.2 Installation

#### 2.2.1 Download the latest NADA

• 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	Туре	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

### 2.2.2 Setup application folder

• 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.

### 2.2.3 Folder permissions

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.

**Note:** 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/cache this is where cached web pages will be stored
- your-nada-web-folder/logs this is where the log files will be stored

### 2.2.4 Configure MySQL database

1. Browse to the your-nada-web-folder/application/config folder.



- 1. 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.
- 2. Optional: change the database name to use another name.
- 3. 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.

### 2.2.5 Create database user account

The goal being to avoid using Root for your NADA configuration.

1. From the command line type:

mysql -u root -p

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

mysql> CREATE DATABASE nada;

4. 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

5. 'yourpassword' can be anything you choose. 'nada' is the name of the database the user gets access to. 'local-host' is the location which gets access to your database.

Note: Remember this password, you will need it to configure your NADA installer!

6. Then exit MySQL console by typing exit.

mysql> exit

#### 2.2.6 Running the installer

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

URL of NADA 4 folder	ocalhost/nada4/index.p	ohp/install				-
one of the best of black	NADA Installe	er				
	Server information				٦	
	PHP version:	5.4.7				
	DB version:	5.5.27 - connection		-	۲ ۲	Server information: Check,
	Web server:	Apache/2.4.3 (Win	32) OpenSSL/1.0.1c PHP/5.4	1.7		must be PHP 5.3+
	Required PHP Exter	nsions			J	
	Extensions				Enabled	
	xsl				A      A  A     A	Required PHP
	xml				× .	extensions must
	simplexml				4	be loaded on the
	xmlreader					server. mbstring
	gd (optional)				v [	is needed for the
	zip (optional)					pdf generator
					· ·	
	mbstring (optional)					and the gd library for the mail
	mysql					
	Other PHP.INI Settin	ngs				Captcha
	Setting	Value	Recommended			
	file_uploads	Enabled	Enabled			
	post_max_size	8M	20M		_	
	upload_max_filesize	2M	15M			Recommended PHP.ini
	date.timezone	Europe/Berlin	See how to configure and	select the right timezone		settings
	Folder READ/WRITE	DELETE permise	ions			
	Folder	Decere permas	Read/Write	Delete	1	
	Catalog (datafiles)		×	~		
	Cache (./cache/)		×	×		These folders must have
	Log (./logs/)		4	×		read/write permissions
				(Install D	Database	

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!

# NADA Installer

# Create administrator account

•

First Name\*

Last Name\*

Email Address\*

Company

Phone

**~ . .** 

Country

1		
1	-	

Password\*

Password Confirm\*

Create account

**Congratulations: Launch the new site** 

# NADA Installer

# Installation completed!

The application installation has completed, the summary of the tasks is below:

Task	Status
Database	×
Tables	×
Admin account	×

Click here to launch the website!

# 2.3 Installing NADA using Microsoft SQL Server

### 2.3.1 PHP database drivers (sqlsrv)

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

### 2.3.2 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.

### 2.3.3 Download drivers

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 drivers:

- 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 information about downloading and installing PHP, visit PHP on Windows (http://windows.php.net).
- Microsoft SQL Server 2012 Native Client available in the SQL Server 2012 Feature Pack. (This is needed if database and web server are on different machines)
- Any edition of SQL Server 2005 or later.

#### 2.3.4 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.

#### 2.3.5 How to install the SQLSRV driver for PHP

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

- 1. The drivers are available from the Microsoft website: http://www.microsoft.com/downloads/en/details.aspx?FamilyID=80e44913-24b4-4113-8807-caae6cf2ca05
- 2. Download the drivers and run the setup file.
- 3. The setup file will extract a number of .dll files to your PHP extension folder.
- 4. Browse to the PHP extension folder E.g. c:phpext.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\_vc6.dll
php\_sqlsrv\_53\_nts\_vc9.dll
php\_sqlsrv\_53\_ts\_vc6.dll
php\_sqlsrv\_53\_ts\_vc9.dll

1. 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(); ?>

- 2. 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'll 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

Sy	stem	Windows NT PN3022058 6 i586		
Bu	ild Date	te Mar 17 2011 10:46:06		
Co	mpiler	MSVC9 (Visual C++ 2008)		
	Thread Safety		disabled	

1. With the above values you would choose the file: php\_sqlsrv\_53\_nts\_vc9.dll

ts=Thread safety nts=Non-thread safety

2. 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

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

sqlsrv.WarningsReturnAsErrors

### 2.3.6 Testing the SQLSRV drivers and SQL Client

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

sql	srv
-----	-----

sqlsrv support		enabled	
Directive	Loc	al Value	Master Value
sqlsrv.LogSeverity	0	ai vaide	0
sqlsrv.LogSubsystems	0		0

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.

On

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

On

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:

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

ODBC Data Source Administrator						
User DSN System DSN File DSN Drivers Tracing Connection Pooling About						
ODBC Drivers that are installed on your system:						
Name	Version	Company	<b>^</b>			
Microsoft Text Driver (*.txt; *.csv)	6.01.7601.17632	Microsoft Corporatio	on I			
Microsoft Text-Treiber (*.txt; *.csv)	6.01.7601.17632	Microsoft Corporatio	on I			
Microsoft Visual FoxPro Driver	6.01.8629.01	Microsoft Corporatio	n '			
Microsoft Visual FoxPro-Treiber	6.01.8629.01	Microsoft Corporatio	n '			
SQL Server	6.01.7601.17514	Microsoft Corporation	n :			
SQL Server Native Client 10.0	2009.100.1600.01	Microsoft Corporation	n 🗐			
SQL Server Native Client 11.0	2011.110.2100.60	Microsoft Corporation	on E			
			*			
<			- F			
An ODBC driver allows ODBC-enabled programs to get information from ODBC data sources. To install new drivers, use the driver's setup program.						
ОК	Cancel	Apply	Help			

### 2.3.7 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

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 ODBC above to confirm that the client has been installed.

### 2.3.8 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']['dbdriver'] = "nada-database";
$db['sqlsrv']['dbdriver'] = "sqlsrv";
$db['sqlsrv']['dbprefix'] = "";
$db['sqlsrv']['dbmect'] = FALSE;
$db['sqlsrv']['db_debug'] = FALSE;
$db['sqlsrv']['cache_on'] = FALSE;
$db['sqlsrv']['cachedir'] = "";
$db['sqlsrv']['cachedir'] = "utf8";
$db['sqlsrv']['dbcollat'] = "utf8_general_ci";
```

Fill in the database connection settings for the database created for NADA.

Save the changes.

### 2.3.9 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.

NADA Installe	er			
Server information PHP version:	5.4.7			
DB version:	5.5.27 - connection	n was successful!		<ul> <li>Server information: Check,</li> </ul>
Web server:	Apache/2.4.3 (Win	32) OpenSSL/1.0.1c PHP/5.4.7		must be PHP 5.3+
Required PHP Exter	rione			
Extensions	isions		Enabled	T I I I I I I I I I I I I I I I I I I I
xsl				
xml			· · · · · · · · · · · · · · · · · · ·	Required PHP
			· · · · · · · · · · · · · · · · · · ·	extensions must
simplexml			~	be loaded on the
xmlreader			-	<ul> <li>server. mbstring</li> </ul>
gd (optional)			×	is needed for the
zip (optional)			×	pdf generator
mbstring (optional)			×	and the gd library
mysql			<ul> <li></li> </ul>	for the mail
Other PHP.INI Settin	as			Captcha
Setting	Value	Recommended		1
file_uploads	Enabled	Enabled		
post_max_size	8M	20M		
upload_max_filesize	2M	15M		Recommended PHP.ini
date.timezone	Europe/Berlin	See how to configure and sele	ect the right timezone	settings
Folder READ/WRITE	DELETE permiss	ions	-	J –
Folder		Read/Write	Delete	
Catalog (datafiles)		×	×	
Cache (./cache/)		×	×	- These folders must have
Log (/logs/)		4	<b>v</b>	read/write permissions
			Install Database	

- 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 of atleast 12 characters long with some uppercase, punctuation and numbers to aid security of your site. Do not forget this username and password!

# NADA Installer

# Create administrator account

٠

First Name\*

Last Name\*

Email Address\*

Company

Phone

Country

Password\*

Password Confirm\*

Create account

**Congratulations: Launch the new site** 

## **NADA Installer**

# Installation completed!

The application installation has completed, the summary of the tasks is below:

Task	Status
Database	×
Tables	×
Admin account	×

Click here to launch the website!

# 2.4 PHP settings

### 2.4.1 Finding the correct PHP.INI

To make sure you are editing the correct PHP.INI settings file, create a PHP file (e.g. info.php) in your nada website folder with the following contents:

<?php phpinfo(); ?>

Open the phpinfo page in your web browser and you should see output similar to below screenshot. Edit the php.ini file displayed by the setting **Loaded Configuration File**.

# PHP Version 5.4.10



System	Linux lvivdev.whbdns.com 2.6.32-042stab059.7 #1 SMP Tue Jul 24 19:12:01 MSK 2012 x86_64
Build Date	Jan 16 2013 15:24:03
Configure Command	'/configure' 'enable-bcmath' 'enable-calendar' 'enable-exif' 'enable-ftp' 'enable- gd-native-ttf' 'enable-intl' 'enable-libxml' 'enable-mbstring' 'enable-pdo=shared' 'enable-soap' 'enable-sockets' 'enable-wddx' 'enable-zip' 'prefix=/usr/local' 'with- apxs2=/usr/local/apache/bin/apxs' 'with-bz2' 'with-curl=/opt/curlssl/ 'with-curlwrappers' 'with-enchant=/usr' 'with-freetype-dir=/usr' 'with-gd' 'with-gettext' 'with-icu-dir=/usr' 'with-imap=/opt/php_with_imap_client/' 'with-imap-ssl=/usr' 'with-jpeg-dir=/usr' 'with- kerberos' 'with-libdir=lib64' 'with-libexpat-dir=/usr' 'with-libxml-dir=/opt/xml2/' 'with- libxml-dir=/opt/xml2/' 'with-mcrypt=/opt/libmcrypt/' 'with-mysql=/usr' 'with-mysql- sock=/var/lib/mysql/mysql.sock' 'with-mysqli=/usr/bin/mysql_config' 'with-openssl=/usr' 'with-openssl-dir=/usr' 'with-pcre-regex=/opt/pcre' 'with-pdo-mysql=shared' 'with- pdo-sqlite=shared' 'with-pgsql=/usr' 'with-pic' 'with-png-dir=/usr' 'with-pspell' 'with-snmp' 'with-tidy=/opt/tidy/' 'with-xmlrpc' 'with-xpm-dir=/usr' 'with-xsl=/opt/xslt/' 'with-zlib' 'with-zlib-dir=/usr'
Server API	CGI/FastCGI
Virtual Directory Support	disabled
Configuration File (php.ini) Path	/usr/local/lib
Loaded Configuration File	/usr/local/lib/php.ini
Scan this dir for additional .ini files	(none)
Additional .ini files parsed	(none)
PHP API	20100412
PHP Extension	20100525
Zend Extension	220100525
Zend Extension Build	API220100525,NTS
PHP Extension Build	API20100525,NTS
Debug Build	no
Thread Safety	disabled
Zend Signal Handling	disabled
Zend Memory Manager	enabled Chapter 2. Installation gu

#### 2.4.2 File upload limits

By default PHP allows uploads of 2MB which could be a problem if you have large DDIs and external resource files. To change the settings:

- 1. Edit the php.ini file in notepad and look for the setting upload\_max\_filesize
- 2. The line should look like:

```
; Maximum allowed size for uploaded files.
; http://php.net/upload-max-filesize
upload_max_filesize = 2M
```

3. Change it to the required file upload limit per your needs

upload\_max\_filesize = 50M

4. There is another setting that MUST be changed as well for the file upload limits to work. Look for the configuration **post\_max\_size** and change it to match the value for upload\_max\_filesize:

 $post_max_size = 50M$ 

#### 2.4.3 TimeZone settings

This is for setting the timezone for your application. To findout what is the correct timezone for your website, go to http://php.net/manual/en/timezones.php and find your country/city.

Example:

```
date.timezone = "America/New_York"
```

#### 2.4.4 Increase page execution/timeout

This setting controls the maximum execution time of a page in seconds.

max\_execution\_time = 300

#### 2.4.5 Increase PHP memory limit

It controls the memory available to PHP scripts.

memory\_limit = 128M

#### 2.4.6 Enable/disable PHP extensions

NADA requires the following PHP extensions:

- xsl
- mbstring
- mysql or sqlsrv

To enable XSL extension, add this line:

extension=php\_xsl.dll

#### To enable mbstring:

extension=php\_mbstring.dll

# 2.5 Configure Captcha

By default NADA version 4.1 comes with image captcha and user does not need to make any changes to use image captcha. To use Google Captcha please follow the steps given below:

- 1. Open application/config/captcha.php in editor
- 2. Change line number 12 as shown in below image

NADA 4	
Log in	
Email Address:	]
Password:	]
Login Register Forgot password	
Information you provide by registering or login to our catalog will be used in compliance with the terms of the World Bank <b>Privacy Policy</b> .	

- 3. Click on above URL to generate Public and Private key URL: http://www.google.com/recaptcha/whyrecaptcha
- 4. Click on sign up now
- 5. Sign in using your Gmail account
- 6. After signed in you will have to enter your URL (Domain URL)



- 7. Click on "enable globel key for all domain
- 8. Click on Create Key button
- 9. Copy public key and private key from Google Captcha website and inserte it on line number 51 and 52 respectively as shown in below image

I	47	-*/
I	48	<pre>\$config['recaptcha']['apiserver']="http://www.google.com/recaptcha/api";</pre>
I	49	<pre>\$config['recaptcha']['apisecureserver']="https://www.google.com/recaptcha/api";</pre>
I	50	<pre>\$config['recaptcha']['verifvserver']="www.google.com";</pre>
I	51	<pre>\$config['recaptcha']['publickey']="6Lfwn-0SAAAAAHG9Zp3LVsi4EGCeF8iFBnuFQTK5";</pre>
I	52	<pre>\$config['recaptcha']['privatekey' = 6Lfwn-0SAAAAAA1-oojkBQhGSS9-FvMWA0yFkwse";</pre>
I	53	<pre>\$config['recaptcha']['language']="en";</pre>
I	54	<pre>\$config['recaptcha']['theme']="clean";</pre>

10. To check the Google catpcha configuration go to register page and look for image as shown in below URL highlighted in Red suqare

# User Registration

First Name*	
Last Name*	
Email Address*	
Country*	
- • Password*	
Password Confirm*	
9534325 115	
Type the text	Privacy & Terms
Register Cancel	

# 2.6 Email configurations

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.

- 1. Login to your NADA as an administrator
- 2. Go to Site administration, click on the Settings menu and choose "Settings"

#### C Find the section "SMTP settings"

SMTP settings	
Protocol for sending emails	<ul> <li>Use PHP's builtin mail</li> <li>Use SMTP Server</li> </ul>
Host name	
SMTP port	
Account username	
Account password	

4. 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"

- 5. Enter the host name for the server
- 6. Enter the port used by the server to send mail
- 7. If required, enter the user name used to send mail on the server
- 8. 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.

· Click on forgot password

NADA				
Data Catalog	Citations			
		+ SHARE	f	E

Home > Forgot password

### Forgot password

Please enter your email address so we can send you an email to reset your password.

Email Address Submit

- 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.

Login

### Upgrading from previous versions

### 3.1 Upgrade from NADA 3

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.

Important: Backup the NADA 3.x database before doing anything!!

- 1. Follow the instructions on page 4 and set up a folder in the web root containing the NADA 4 files.
- 2. Edit the database.php file as instructed in the section above: NADA database configurations for MySQL.
- 3. 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";
```

- 4. Save the file.
- 5. Navigate to the URL for the NADA4 site: Example: http://your-nada-site/nada4/index.php/nada4\_upgrade
- 6. The following page loads:

← → C 🗋 localhost/nada4/index.php/nada4\_upgrade

### NADA 3 to 4 upgrade

Please confirm you have done the following steps before you start the upgrade process.

- Make a backup of your nada 3 database. The upgrade script will modify your database and it will no longer work with the NADA 3.
- Make sure the nada database user account has access to create, update, delete, alter database tables, otherwise the script won't work.

#### Upgrade database to NADA 4

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.

#### 3.1.1 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 enoughto 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.

NADA 4.0	Dashboard	Studies -	Citations -	Users 🕶	Menu 🗸	Reports 🕶	Settings <del>-</del>	DEMO DEMO 🔻
Dashboard							Settings Countries	
CENTRAL DATA	A CATALOG				USER	3	Regions	
Catalog contai Owned: 0	Published: 0				1 Activ 0 Disa	bled	Vocabularies	
Linked: 1	Unpublished:				0 Inact	ive - never log	ged in	

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

NADA 4.0 Dashboar	rd Studies <del>-</del>	Citations - Users -	Menu <del>-</del>	Reports -	Settings <del>-</del>		DEMO DEMO 🕶
							Updat
General site settings							
Language							
Use HTML Editor for H	HTML editing?						
Survey catalog settings	\$						
Catalog folder	datafiles	🗸 T	his folder is f	for storing DD	l and related files		
DDI import folder	imports	<b>√</b> F	older to look	for DDI files f	or importing in bulk		
Select topic vocabulary	CESSDA Topi	cs Classifications 💌 Se	lect the voca	bulary to use	for Topics classification	1	

- 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.

#### 3.1.2 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

### 3.1.3 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

NADA 4	1.0 Dashboard	Studies -	Citations -	Users -	Menu <del>-</del>	Reports <del>-</del>	Settings <del>-</del>	
<b>R</b>	Central Data	Manage st	tudies					
	central	Licensed r	equests					Manage studies Add study Bulk im
Dashboard	d › Central Data Catalo	Manage co	ollections					

### Manage Studies [Central Data Catalog] switch

Sort results by:	ountry Title Surv	reyID Modified	Showing 1-1 of 1
Transfer owner	Apply		
	Popstan M Namibia, 20	ultiple Indicators Cluster Survey 2010, Round 1 010	Published
	ID: Collection: Modified on:	NAM_NSA_2010_POP_v01 CENTRAL 06/28/2013	
	Edit   Delete		
Select number of reco	rds to show per	page: 5	Showing 1-1 of 1

Select number of records to show per page: 5

- 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

	NADA 4.0 D	ashboard Studies -	Citations • Users •	Menu <del>+</del> Re	eports≖ Settings≖		
	Cent	tral Data Manage s	studies				
	Central	Licensed	requests	Manage studies Add study Bulk im			
	Dashboard > Central	Data Catalo Manage d	collections				
Select transfer st	udies from dropd	down					
Manage Studies [Central Data Catalog] switch							
	Sort results by:	Country Title SurveyID	Modified			Showing 1-1 of 1	
	Transfer owner	Apply					
Select studies	<sup>&gt;</sup> 🛛 🌄	Popstan Multiple Namibia, 2010	e Indicators Cluster Su	rvey 2010, Rou	ind 1	Published	
		Collection: CE	M_NSA_2010_POP_v01 NTRAL 28/2013				
		Edit   Delete					
	Select number of re	ecords to show per page:	5 💌			Showing 1-1 of 1	

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

# Transfer study owner

Select the collection from the list below to transfer ownership to another collection.

#### Select collection



#### Studies that will be transferred

Popstan Multiple Indicators Cluster Survey 2010, Round 1

Transfer Cancel

### 3.1.4 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.

# 3.2 Migrate MySQL to Microsoft SQL

TODO
## **User manual**

# 4.1 Overview and core concepts

### 4.1.1 About NADA

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.

### 4.1.2 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 surveys. 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 collections, or licensed survey reviewer for all or only some collections, or report generator etc.

### 4.1.3 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.

# 4.2 Site Administration Overview

TODO

# 4.3 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.

		₿					<b>G</b>		
NADA 4.0	Dashboard	Studies -	Citations -	Users -	Menu 🕶	Reports -	Settings -		DEMO DEMO 👻
Dashboard									
CENTRAL DAT	A CATALOG						USERS		
Catalog conta Owned: 1 Linked: 0 Manage studies	Pu Unpu	blished: 1 blished: 0	1 PUF	with no data	i files		1 Active 0 Disabled 0 Inactive - new 21 Anonymous 1 Logged in: de	s users viewing the site	
							CACHE FILES		
							No cache files	were found	
							RECENTLY UP	PDATED STUDIES	
		- U	2				CENTRAL	Popstan Multiple Indicators Cluster Survey 2010, Roun	d 1 Today
								↓ <b>↓</b>	

- 1. Menu link to the Dashboard
- 2. Menu link to the Study Management pages, submenus include: Manage Studies, Licensed requests and Manage Collections
- 3. Menu link to the citations management pages
- 4. Menu link to the User management pages, submenus include: All users, Add user and Impersonate User
- 5. Menu link to create menu pages for the site frontend
- 6. Menu link to generate usage reports
- 7. Menu Link to the settings pages, submenus include: Settings, Coutries, Regions and Vocabularies
- 8. Useful navigation links, submenus include: Change Password, Log out, Catalog Home, Data catalog, Citations
- 9. 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 publishedunpublished, 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
- 10. Provides a summary of users, registrations and number of users currently logged in.
- 11. Show how many pages are being cached on the site with a link to clear the cache if need be.
- 12. 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.

# 4.4 Manage Collections

### 4.4.1 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.

### 4.4.2 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.



### Manage Studies [Central Data Catalog] switch

Sort results by:	Sort results by: Country Title SurveyID Modified						
Transfer owner	Apply						
	Popstan Multiple Indicators Clust Namibia, 2010	ter Survey 2010, Round 1	Published				
	ID: NAM_NSA_2010_POP_v01 Collection: CENTRAL Modified on: 06/28/2013						
	Edit   Delete						
	ords to show per page: 5 💽	ult NADA 4 installation.	Showing 1-1 of 1				
NADA 4.0 Dashboard	rrd Studies∓ Citations∓ Users∓ Meno	u≁ Reports∓ Settings∓	DEMO DEMO 🕶				
Collections	All fields 💌 Search	Click to create new collection	Create new collection & Collection Groups E				
No records were found			(				

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

Create new	collection
Create new	conection
Collection Identifica	
DHS	Health Surveys
Short description*	
The Health Survey	Collection is a collection of all health surveys conducted by the Statistics Office as well as other data producers.
Long description (th	s will become the collection about page)*
	s his become the concerton about page)
	collection aims to provide frequent high quality and timely health data needed by the decision makers
when designing pu	collection aims to provide frequent high quality and timely health data needed by the decision makers lic health programs.
when designing pu	collection aims to provide frequent high quality and timely health data needed by the decision makers
when designing pu	collection aims to provide frequent high quality and timely health data needed by the decision makers lic health programs.
when designing pu	collection aims to provide frequent high quality and timely health data needed by the decision makers lic health programs.
when designing pu	collection aims to provide frequent high quality and timely health data needed by the decision makers lic health programs.
when designing pu	collection aims to provide frequent high quality and timely health data needed by the decision makers lic health programs.
when designing pu	collection aims to provide frequent high quality and timely health data needed by the decision makers lic health programs.
when designing pu	collection aims to provide frequent high quality and timely health data needed by the decision makers lic health programs.
when designing pu Health surveys pr Thumbnail*	collection aims to provide frequent high quality and timely health data needed by the decision makers lic health programs.
when designing pu Health surveys pr Thumbnall* Pro	collection aims to provide frequent high quality and timely health data needed by the decision makers lic health programs. vide useful information on health status and health consumption and their determinants.
when designing pu Health surveys pr Thumbnall* Prc	collection aims to provide frequent high quality and timely health data needed by the decision makers lic health programs. vide useful information on health status and health consumption and their determinants. Ide thumbnall path icon-blank png
when designing pu Health surveys pr Thumbnall* Pro file OR	collection aims to provide frequent high quality and timely health data needed by the decision makers lic health programs. vide useful information on health status and health consumption and their determinants. ide thumbnall path icon-blank png upload a thumbnall file (gif,png.jpg)
when designing pu Health surveys pr Thumbnall* Pro file OR	collection sims to provide frequent high quality and timely health data needed by the decision makers lic health programs. vide useful information on health status and health consumption and their determinants. Ide thumbnall path icon-blank png
when designing pu Health surveys pr Thumbnall* Pro file OR	collection aims to provide frequent high quality and timely health data needed by the decision makers lic health programs. vide useful information on health status and health consumption and their determinants. ide thumbnall path icon-blank png upload a thumbnall file (gif,png.jpg)
Thumbnail*	collection aims to provide frequent high quality and timely health data needed by the decision makers lic health programs. vide useful information on health status and health consumption and their determinants. ide thumbnall path icon-blank png upload a thumbnall file (gif,png.jpg)
Thumbnall*	collection aims to provide frequent high quality and timely health data needed by the decision makers lic health programs. vide useful information on health status and health consumption and their determinants. ide thumbnall path icon-blank png upload a thumbnall file (gif,png.jpg)

1. 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> The Health Surveys collection aims to provide frequent high quality and timely health data needed by the decision makers when designing public health programs. Health surveys provide useful information on health status and health consumption and their determinants.

Copy any images to be displayed into the NADA "files" folder on your server .. image:: ../images/thumbnil-image.png

4. 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.

Thumburailt	Upload thumbnail or copy to the files folder and enter the path to the image here					
Thumbnail*	Provide thumbnail path					
	files/dhs-icon.jpg					
2	mes/uns-icon.jpg					
and the state	OR upload a thumbnail file (gif,png,jpg)					
	Choose File No file chosen					

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:

Т

							Preview
10	)	Title	Туре	Weight	Status	Actions	
D	HS	Health Surveys	Internal	0	Published	Edit   Delete   Permission	ns   Preview

### Health Surveys



• 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).

### Central Data Catalog



• 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.

Dashboard

CENTRAL DATA CATALOG							
Catalog contains Owned: 4 Linked: 0	4 studies Published: 4 Unpublished: 0	<ul><li>3 PUF with no data files</li><li>1 pending requests</li></ul>					
Manage studies Histo	Manage studies History						
COLLECTION: HEA	LTH SURVEYS						
Collection contains 0 studiesOwned: 0Published: 0Linked: 0Unpublished: 0							
Manage studies Administrators History Edit collection							

### 4.4.3 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.							
NADA 4.0	Dashboard	Studies -	Citations -	Users -	Menu 🕶	Reports -	Settings -	
He He	alth Surv	Manage st	udies 🔸	Central Data	a Catalog			
DHS	S	Licensed r	equests	Health Surv	eys			Manage studies
Dashboard > Health Surveys > Ma		Manage co	ollections	Na				
				ine	w cata	alogto	manag	ge (e

#### upload the study to

# Manage Studies [Health Surveys] switch

No records were found

• 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

	P	Add Study
Health Surveys		Manage studies Add study

#### Dashboard > Health Surveys > Manage studies

### Manage Studies [Health Surveys] switch

No records were found

• 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).

Manage Studies [Central Data Catalog] switch



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.

### 4.4.4 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.



Manage studies	Add study	Bulk import DDI	Copy studies	Licensed requests

• 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.

#### Copy studies to Health Surveys

All falda 💻 Caarab

Click on the Link or Unlink buttons to link or unlink studies

		All fields V Search			
Studies linked from other collections: 0					
Collection	Country	Title	Modified	Actions	
CENTRAL	Namibia	Demographic and Health Survey 1992 - 1992	07/01/2013	Unlink	
CENTRAL	Namibia	Demographic and Health Survey 2000 - 2000	07/01/2013	Unlink	
CENTRAL	Namibia	Demographic and Health Survey 2006-2007 - 2007	07/01/2013	Unlink	
CENTRAL	Namibia	Popstan Multiple Indicators Cluster Survey 2010, Round 1 - 2010	06/28/2013	Link	
Select number of records to show per page: 15					

• 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 publishunpublish green button is absent for the copied studies

### 4.4.5 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

NADA 4.0 Das	hboard Studies •	Citations -	Users -	Menu 🕶	Reports -	Settings -
Dashboard > settings						
Site Configu	urations					I.
-> General site set	lings					
Language						
- Use HTML Editor	for HTML editing? -					
Survey catalog set	tings					
Catalog folder	datafiles		✓ 7	'his folder is	for storing DD	I and related files
DDI import folder	imports		✓ F	older to looi	k for DDI files t	or importing in bulk
						or importing in cont
Select topic vocabul	CESSDA T	opics Classifica	tions 💌 Se	elect the voc	abulary to use	for Topics classification
Regional filter	Enable					
	Disable					
Topic filter	Enable Disable					
Year filter	Enable Disable					
Collection files	a Fachla					
Collection filter	Enable Disable		Enab	letov	view co	llection filte
Data access filter	Enable		Linds			incetion mee
	<ul> <li>Disable</li> </ul>					

### 4.4.6 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.

Demograp	hic and Health Survey 1992	Survey options
Reference No.	NAM_1992_DHS_v01_M	Browse metadata     Upload RDF
Year	1992	Link resources
Country	Namibia	Generate PDF     Transfer study owner
Publisher	Ministry of Health and Social Services (MOHSS)	Replace DDI
Sponsor	Government of Japan Funding World Bank Channel of delivery	Export DDI     Refresh DDI     Export RDF
Folder	central/8f4571b3c88b73807148c3089314541f	Delete study
Collection	CENTRAL DHS	

• Select the collection to transfer from the dropdown box.

# Transfer study owner

Select the collection from the list below to transfer ownership to another collection.

### Select collection

Health Surveys

### Studies that will be transferred

Demographic and Health Survey 1992



- 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.

rt results by: c	ountry Title SurveyID Modified	Showing 1-4 o
Batch actions	Apply	
Batch actions Transfer owner Publish unpublish Delete	Demographic and Health Survey 2003           South Africa, 2003 - 2004           ID:         ZAF_2003_DHS_v01_M           Collection:         DHS           Modified on:         07/01/2013           Edit   Delete	Published
	Demographic and Health Survey 1992 Namibia, 1992	Published
20	ID: NAM_1992_DHS_v01_M Collection: DHS Modified on: 07/01/2013	
	Edit   Delete	
	Demographic and Health Survey 2000 Namibia, 2000	
	ID: NAM_2000_DHS_v01_M Collection: CENTRAL DHS Modified on: 07/01/2013	
	Edit   Remove	
	Demographic and Health Survey 2006-2007 Namibia, 2006 - 2007	pending request
	ID: NAM_2006_DHS_v01_M Collection: CENTRAL DHS Modified on: 07/01/2013	
	Edit   Remove	

### Manage Studies [Health Surveys] switch

# 4.5 Manage Studies

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

### 4.5.1 Option 1:

- 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.

### 4.5.2 Option2:

#### 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 publishunpublish green button is absent for the copied studies

# 4.6 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.

CENTRAL DATA CA	ATALOG	
Catalog contains Owned: 2 Linked: 0	2 studies Published: 2 Unpublished: 0	<ul> <li>PUF with no data files</li> <li>pending requests </li> </ul>
Manage studies Histo	iry	

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

NADA 4.0	Dashboard	Studies -	Citations -	Users -	Menu 🕶	Reports -
Dashboard		Manage s	tudies >			
CENTRAL DATA	A CATALOG	Licensed	requests			
Catalog contai Owned: 2 Linked: 0	Pub	Manage of Manage		with no data ing requests		
Manage studies	History					

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

		Search				
Batc	h actions 💌 🗛 App	ly				Showing 1-1 of 1
	Repository	Title	Requested By	Status	Date	Actions
	CENTRAL	Namibia - Demographic and Health Survey 2006-2007 - 2006	demo demo	Pending	06-28-2013	Edit   Delete
						Showing 1-1 of 1

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

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

# Edit licensed request

Request information Process	s Communicate Monitor Forward request				
Request information	Request status: Pending				
	Request ID: 1, Dated: Fri, Jun/28/2013 23:11:38				
First Name	Demo				
Last Name	Demo				
Organization	IHSN				
Email	demo@ihsn.org				
Dataset requested	Namibia - Demographic and Health Survey 2006-2007 NAM_2006_DHS_v01_M				

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

Request information Process Communicate Monitor	Forward request	
Request status: Pending		
Select action      Approve      Deny      Request more information	on © Cancel authorization	
Grant access to licensed data files		
✓ File	Download limit	Expiry
✓ popstan_2010_hld.dta	3	07/31/2013
To change all settings at once, fill the boxes and click apply.	3	07/31/2013 Apply
Comments (comments will be visible to the user)		, i
View request history		
Votify user by email Update Cancel		

- 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.

# 4.7 Manage 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.

Deshboard - Citations  Citations  Add new citation  Add new citati	N	IADA 4.0	Dashboard	Studies -	Citations -	Users 🕶	Menu <del>-</del>	Reports <del>-</del>	Settings <del>▼</del>
CENTRAL DATA CATALOG     USERS      OSERS      Osero     The     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.     Related studies     Click on the Attach studies link. This reveals a list of all studies in the catalog.     Select Studies     Title     Title     Country Veer     South Afric 2004 Select     South Afric 2004 Select     South Afric 2004 Select     Namibia 1992	Da	ashboard							
NADA 4.0 Dashboard Studies* Citations* Users* Menu* Reports* Settings* DEMO DEMO   Dashboard > Citations   Add new citation   Citations   Add new citation   Add New Citation * Import Citation   Citations   Add new citation   Add new citation   Citations   Add new citation   Citations   Add new citation   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.   Related studies   No records found Click on the Attach studies link. This reveals a list of all studies in the catalog. Select Studies   Select Studies   The country Year South Africa 2004 Select Demographic and Health Survey 2003 South Africa 2004 Select Demographic and Health Survey 1992 Namibia 1992 Select	C	ENTRAL DATA	CATALOG		Export citati	ons			USERS
Dashboard > Citations          Citations       Add new citation <ul> <li>Add new citation</li> <li>Add new citation</li> <li>Add new citation</li> </ul> • Compete the form including the indication as to whether the citation should be published or not. <ul> <li>Then expand the Related studies link to tell the system which studies the citation "belongs" to.</li> </ul> Related studies         Attach studies the citation should be published or not.           No records found.         Attach studies the citation should be published or not.           • Click on the Attach studies link. This reveals a list of all studies in the catalog.         Select Studies           Select Studies <ul> <li>Title</li> <li>Country</li> <li>Year</li> <li>Demographic and Health Survey 2003</li> <li>South Africa</li> <li>South Africa</li> <li>Select</li> <li>The Select</li> <li>Demographic and Health Survey 1992</li> <li>Namibia</li> <li>1992</li> <li>Select</li> </ul>	•	• To add a citati	ion - click on Al	ll citations th	en click on the A	Add New Ci	itation button at	t the top ri	ght.
Add new citation        Add new citation                 Add new citation	NA	DA 4.0 Dashboard	Studies - Citations	▼ Users▼ Men	iu≁ Reports≁ Settin	gs <del>-</del>			DEMO DEMO 👻
Citations   Add new citation   Alf fields   • 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.   Related studies   No records found.   • Click on the Attach studies link. This reveals a list of all studies in the catalog.   Select Studies   Image: Title Search   Image: Title Search   Image: South Africe 2004 Select   South Africe 2004 Select   Image: South Africe 2004 Select   Image: South Africe 2004 Select   Image: Select Studies and Health Survey 1992	Dast	hboard > Citations							
<ul> <li>Then expand the Related studies link to tell the system which studies the citation "belongs" to.</li> <li>Related studies</li> <li>No records found.</li> <li>Click on the Attach studies link. This reveals a list of all studies in the catalog.</li> <li>Select Studies</li> </ul>	С	itations	All fields		Search No records w		$\rightarrow$ v citation	Add New Citat	tion + Import Citations
Select Studies         Title       Search         ID       Title       Search         South Africa       2004       Select         3       Demographic and Health Survey 1992       Select		•	•	he indication	as to whether the	ne citation s	hould be publis	shed or no	t.
ID       Title       Country       Year         5       Demographic and Health Survey 2003       South Africa       2004       Select         3       Demographic and Health Survey 1992       Namibia       1992       Select	Rela	ated studies	the Related stud	ies link to tel	ll the system whi	ch studies t	the citation "be	longs" to.	Attach studies
ID     Title     Country     Year       5     Demographic and Health Survey 2003     South Africa     2004     Select       3     Demographic and Health Survey 1992     Namibia     1992     Select	Rela No r	• Click on the A		nk. This reve	als a list of all st			longs" to.	
5     Demographic and Health Survey 2003     South Africa     2004     Select       3     Demographic and Health Survey 1992     Namibia     1992     Select	Rela No r	• Click on the A		nk. This reve	als a list of all st			longs" to.	Attach studies
	Rela No r	ect Studies		nk. This reve	als a list of all st		e catalog.		
4 Demographic and Health Survey 2000 Namibia 2000 Select	Rela Nor Sele	ated studies records found. Click on the A ect Studies	Attach studies lir	nk. This reve	als a list of all st		e catalog. Country	Year	Attach studies
	Rela No r Sele	Click on the A     Click on the A     Click on the A     Title     Demographic and Heal	Attach studies lin	nk. This reve	als a list of all st		e catalog. Country South Afric	Year a 2004	Attach studies
2 Demographic and Health Survey 2006-2007 Namibia 2007 Select	Rela Nor Sele	tecords found.     Click on the A     Click Studies     Title     Demographic and Heal	Attach studies lin	nk. This reve	als a list of all st		e catalog. Country South Afric Namibia	Year           a         2004           1992	Attach studies
1 Popstan Multiple Indicators Cluster Survey 2010, Round 1 Namibia 2010 Select	Relation Norr Selection Se	tecords found.     Click on the A     Click on the A     cet Studies     Title     Demographic and Heal     Demographic and Heal	Attach studies lin Ith Survey 2003 Ith Survey 1992 Ith Survey 2000	nk. This reve	als a list of all st		e catalog. Country South Afric Namibia Namibia	Year           a         2004           1992         2000	Attach studies

• 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.

Title         Country         year           Image: Country of the state of the s			Attach studies
Demographic and Health Survey 2006-2007 Namibia 2006 - 2007	Title	Country	year
	Demographic and Health Survey 2006-2007	Namibia	2006 - 2007

- 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

NADA 4.0	Dashboard	Studies <del>-</del>	Citations -	Users <del>•</del>	Menu <del>-</del>	Reports <del>-</del>	Settings <del>-</del>
Dashboard › Cita	tions → import_ci	tations	All citations Import citatio Export citatio				

# **Import Citations**

• 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** 

						Showin	ng 1-1 of 1
e Title		Date	Published	Created	Modified	Actions	. 4
prevalence and sexua	al behaviors from a nationally	2005	~	07/02/2013	07/02/2013	Edit   Delete	0
mber of records to show pe	r page: 5 💌					Showin	ng 1-1 of 1
n	Young people's sexua prevalence and sexua representative house	Young people's sexual health in South Africa: HIV prevalence and sexual behaviors from a nationally	Young people's sexual health in South Africa: HIV prevalence and sexual behaviors from a nationally representative household survey	Young people's sexual health in South Africa: HIV prevalence and sexual behaviors from a nationally 2005 representative household survey	Young people's sexual health in South Africa: HIV prevalence and sexual behaviors from a nationally 2005	Title     Date     Published     Created       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	Title     Date     Published     Created     Created     Actions       Voung 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

# 4.8 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 collections, or licensed survey reviewer for all or only some collections, or report generator, or citation manager etc.

### 4.8.1 Creating User accounts

#### User accounts can be created in two ways:

1. 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.

- 2. A user account can also be created by a Site Administrator.
- To do this login as a Site Administrator
- Go to the site administration section of the application.

• Select Users – Add user from the top menu.

# Log in

Email Addres	is:
Password:	
Login	Register Forgot password
	provide by registering or login to our catalog will be the with the terms of the World Bank Privacy Policy.

• 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.

# Create new user account

# Username\*

Health\_Licensed

# Email Address\*

Health\_Licensed@ihsn.org

# First Name\*

Health

# Last Name\*

Licensed

## Company

IHSN

# Phone

123456789

# Country

United States	•
---------------	---

# Password\*

.....

# Password Confirm\*

•••••

# User account status?

- 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.

	A 4.0 Dashboa	rd Studies • Citations •	Users -	Menu 🕶	Reports -	Settings <del>+</del>			DEMO DEMO
ebb	oard > Users		All users						
31104	0307 03013		Add user		1				
			Impersona	ate user	]				💠 Create new user accou
Js	er Manager	All fields	<ul> <li>Search</li> </ul>	1					
		1.	Gealen	ļ					Showing 1-3 of 3
	Username	Email Address		er group	Status	Country	Joined	Last login	Showing 1-3 of 3
	Username demo demo				Status	Country United States	Joined 06-28-2013	Last login 07-02-2013	-
		Email Address	Use					-	Actions
	demo demo	Email Address demo@ihsn.org	Use		ACTIVE	United States	06-28-2013	07-02-2013	Actions Edit   Delete   Permissions

• 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.

### 4.8.2 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

# Edit user permissions - Health Licensed

### Site level permissions

### General user accounts (no admin access)

General site users with no access to site administration

User

General user account with no access to site administration

### Site administrators (full access)

Full control over all site sections

#### Site administrators (limited access)

Limit user access to the site administration and control permissions per collection for the user

### Update Cancel

• 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.

# Edit user permissions - Health Licensed

- Site level permissions
General user accounts (no admin access) General site users with no access to site administration
Site administrators (full access) Full control over all site sections
admin It is the site administrator and has access to all site content
Site administrators (limited access) Limit user access to the site administration and control permissions per collection for the use
Update Cancel

### 4.8.3 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)

# Edit user permissions - Health Licensed

<ul> <li>Site level permissions</li> </ul>
General user accounts (no admin access) General site users with no access to site administration
Site administrators (full access) Full control over all site sections
Site administrators (limited access) Limit user access to the site administration and control permissions per collection for the user
Collection administrators Users can manage and review studies for collections they are assigned to
Report viewer Can only generate/view reports
Citation manager has full control over the citations
Global Licensed Reviewer This account can review licensed data requests from all collections

### Update Cancel

- 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.

#### Site administrators (limited access)

Limit user access to the site administration and control permissions per collection for the user

- Collection administrators Users can manage and review studies for collections they are assigned to
- Report viewer Can only generate/view reports
- Citation manager has full control over the citations
- Global Licensed Reviewer This account can review licensed data requests from all collections

### Permissions per collection

### **Health Surveys**

- Manage studies (full access) Full control over the studies including adding, updating, publishing, copying from other collections, e
- Manage studies (limited access) All access except can't publish or unpublish studies
- Manage licensed requests Allows user to view and process licensed data requests for the collection
- Reviewer

Allows user to review studies from the front-end regardless of study publish/unpublish status

### Update Cancel

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

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

### 4.8.4 Global level Limited access accounts

#### Other types of limited access accounts include:

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

Site administrators (limited access) _imit user access to the site administration and control permissions per collection for the user
Collection administrators Users can manage and review studies for collections they are assigned to
Report viewer Can only generate/view reports
Citation manager has full control over the citations
Global Licensed Reviewer This account can review licensed data requests from 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

🔀 localhost/nada4/inc × 🔀 Health Surveys 🛛 × 🔀 C	entral Data Catalo × 🌘 Site configurations 🛛 👋 🕒 Central Data Catalo × 🔪 🕒 (	Citations × 🔽 🗖 🔀
← → C □ localhost/nada4/index.php/admin/u	ers/permissions/3	☆ 😸
NADA 4.0 Dashboard Studies - Citations -	Users ▼ Menu ▼ Reports ▼ Settings ▼	DEMO DEMO 🕶
Edit user permissions - Health	All users Add user	🔹 Users) 🗣 Create new user account)
Eult user permissions - Health	Impersonate user	

Site level permissions

• A list of users to impersonate is shown.

# Impersonate as another user

Select the account below to impersonate as:



Health Reviewer Health\_Reviewer@ihsn.org

impersonate Cancel

- Select the user to impersonate and click on the impersonate button.
- The dashboard view for the impersonated user now shows

NADA 4.0	Dashboard	Studies <del>-</del>		HEALTH_LICENSED -
Dashboard				
CENTRAL DATA	CATALOG		USERS	
Catalog contain Owned: 3 Linked: 2 Manage studies	s 5 studies Published: 3 Unpublished: 0	<ul> <li>2 PUF with no data files</li> <li>1 pending requests</li> </ul>	3 Active 0 Disabled 0 Inactive - never logged in -2 Anonymous users viewing the site 3 Logged in: <i>demo demo, health_licensed, healt</i>	h_reviewer
COLLECTION: HE	EALTH SURVEYS		CACHE FILES	
Collection conta	ains 4 studies	PUF with no data files	You have 2 cached files, click here to clear cach	e.
Owned: 2	Published: 4	with no questionnaires	RECENTLY UPDATED STUDIES	
Linked: 2	Unpublished: 0		DHS Demographic and Health Survey 20	03 Yesterday
Manage studies A	dministrators Histor	/ Edit collection	DHS Demographic and Health Survey 19	92 Yesterday
			CENTRAL Demographic and Health Survey 20	00 Yesterday
			CENTRAL Demographic and Health Survey 20	06-2007 Yesterday
			CENTRAL Popstan Multiple Indicators Cluster 3 2010, Round 1	Survey 4 days ago

- 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.

NADA 4.0 Dashboard Studies -	HEALTH_LICENSED -
Health Surveys DHS Manage studies Add study Bulk import DDI Copy stu	Exit impersonate mode Change Password Logout
Dashboard > Health Surveys > Manage studies	Home Data Catalog
Manage Studies [Health Surveys] switch	Citations

### 4.8.5 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

# Edit user permissions - Health Reviewer

### Site level permissions

#### General user accounts (no admin access) General site users with no access to site administration

Site administrators (full access) Full control over all site sections

#### Site administrators (limited access)

Limit user access to the site administration and control permissions per collection for the user

#### Collection administrators

Users can manage and review studies for collections they are assigned to

- Report viewer Can only generate/view reports
- Citation manager has full control over the citations

#### Global Licensed Reviewer This account can review licensed data requests from all collections

### Permissions per collection

#### **Health Surveys**

- Manage studies (full access) Full control over the studies including adding, updating, publishing, copying from other collections, etc.
- Manage studies (limited access) All access except can't publish or unpublish studies
- Manage licensed requests Allows user to view and process licensed data requests for the collection

#### Reviewer

Allows user to review studies from the front-end regardless of study publish/unpublish status

#### Update Cancel

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

# 4.9 Manage Site Pages and Menus

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.

NA	DA 4.0	Dashboard	Studies 🕶	Citations - l	Jsers 🕶	Menu -	Reports •	Settings -		DEMO DEMO 👻
Dash	iboard > Menu	I				All pages				
	Select All ard > Menu	pages from	n the menu.							
								Add New Page	Add New Lin	k Reorder Menu
Ме	nu Mar	na <mark>geme</mark>	nt							
			All	fields 💌 Sea	rch					
Batch	actions 💌	Apply								Showing 1-2 of 2
	Title		URL	Тур	e	Published		Modified	Actio	ons
	Data Cat	alog	catalog	69		~	1	03-22-2011	Edit	Delete
	Citations		citations	69		~	1	08-10-2010	Edit	Delete

Showing 1-2 of 2

- 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.

NADA					
Data Catalog	Citations	Contact Us			
			+ SHARE	f	(

- 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.

Form has been updated successfully!

### Menu Management

Add New Page 📾 Add New Link 🚯 Reorder Menu

# 4.10 The Site Settings Page

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.

NADA 4.0	Dashboard	Studies -	Citations -	Users +	Menu 🕶	Reports -	Settings -	DEMO DEMO 🝷
Dashboard > set	ings						Settings Countries	
Site Con	figuratio	ons					Regions	
	_						Vocabularies	Update
🕂 General si	te settings							
🕂 Language								
-> Use HTML	Editor for HTM	L editing?						
Survey cat	alog settings							
Site login								
-> SMTP sett	ngs							
- Dashboard	1							
								Update

## 4.10.1 General Settings

	General site settings		
	Website title	NADA	
₿	Website footer	Powered by NADA 3.2 and DDI	
¢	Default home page	catalog	Provide the name of the page e.g. catalog or home or about
₫	Webmaster name	noreply	
₿	Webmaster email	webmaster@example.com	
₿	Cache folder	./cache	<
<b>\$</b>	Cache expiration time	7200	Provide time in mili seconds for expiring cached items e.g. 7200=2 hours
働	Disable caching	🔘 Yes 🖲 No	Caching speeds up page load but uses additional disk space

1. 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

NADA		
Data Catalog	Citations	Contact Us

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

	Showing 1-5 of 5 studies	
	Select number of records to show per page: 15 30 50 100	
DA 3.2 and DDI		

- 3. 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.
- 4. The name of the webmaster can be set here. This is the name that will be used in system emails sent to users.
- 5. 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.
- 6. 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.
- 7. Set the time that the Cache takes to expire. By default it is set to 2 hours (in milli seconds).
- 8. 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.

### Site Configurations

			ne
	General site settings		
	Language		
	Language		
	Language	english 💌	
		arabic	
		chinese	
	Use HTML Editor for HTML	english english_ddp	
		engish_microdata	
_	Survey catalog settings —	fench	
		mongolian	
	Site login	russian	
		spanish	
_	SMTP settings		
	Dashboard		
			-
		Upd	ate

Undata

### 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.

Use HTML Editor for H	TML editing?
Use HTML editor	🙆 Yes 🖱 No

### Survey catalog settings

	Survey catalog settings		
A	Catalog folder	datafiles  This folder is for storing DDI and related files	
₿	DDI import folder	imports Solder to look for DDI files for importing in bulk	
¢	Select topic vocabulary	CESSDA Topics Classifications 💽 Select the vocabulary to use for Topics classification	
<b>D</b>	Regional filter	<ul> <li>Enable</li> <li>Disable</li> </ul>	
₿	Topic filter	<ul> <li>Enable</li> <li>Disable</li> </ul>	
<b>(</b>	Year filter	<ul> <li>Enable</li> <li>Disable</li> </ul>	
Ġ	Collection filter	<ul> <li>Enable</li> <li>Disable</li> </ul>	
₽	Data access filter	<ul> <li>Enable</li> <li>Disable</li> </ul>	
	Weights control the order o Data access filter Regional filter	f the filters. Filters are sorted by weights in ascending order.	
Ф	Topic filter Year filter Collection filter	3 6 1 5	
Ф	Catalog search page size	15 Number of records to show on the catalog search page	

- 1. 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.
- 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
   Files can now be directly uploaded to this folder from the Site Administration Manage Studies page page.

- 3. 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.
- 4. 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.
- 5. 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).
- 6. Enable or disable the Year filter on the user interface search page here.
- 7. 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.
- 8. 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.
- 9. 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.
- 10. This setting determines how many studies are displayed by default to the user on the search page catalog view.

#### Site Login settings

A	Site login Password protected website	<ul> <li>Requires all users to login to access the website</li> <li>Login is not required to view the site</li> </ul>
₿	Login timeout (in minutes)	40
¢	Minimum password length	5

- 1. 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.
- 2. Determined how long a user will stay logged in. After this time the user will be automatically logged out.
- 3. Sets the minimum length for passwords created by the users at registration or for manual user creation.

### **SMTP Settings**

. [	SMTP settings	
	Protocol for sending emails	<ul> <li>Use PHP's builtin mail</li> <li>Use SMTP Server</li> </ul>
₿	Host name	ihsn.org
¢	SMTP port	25
₽	Account username	nada@ihsn.org
₿	Account password	

1. 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"

- 2. Enter the host name for the server
- 3. Enter the port used by the server to send mail
- 4. If required, enter the user name used to send mail on the server
- 5. 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
- 6. 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

### 4.10.2 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.

Dashboard News feed URL (RSS) http://ihsn.org/nada/index.php?q=news/feed

CHAPTER 5

Indices and tables

- genindex
- modindex
- search