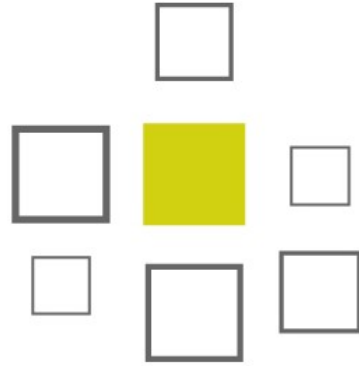


2008-08-14

The DSpace Course - Item Submission Workflows

<https://hdl.handle.net/2160/628>

Boston University



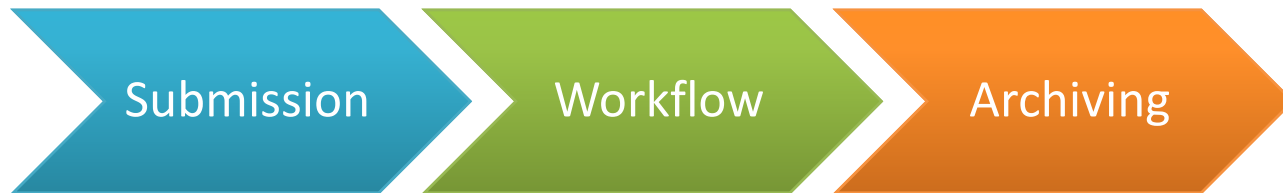
D SPACE

The DSpace Course

Module – Item submission workflows

- By the end of this module you will:
 - Understand the purpose of workflows
 - Be able to describe the three different workflows available in DSpace and when each might be used
 - Be able to create, modify or remove a workflow step from a collection
 - Have created a workflow, submitted an item into the collection with the workflow, and completed the workflow.

- A step in between submission and archiving



- Allows administrative input to submissions
- Workflows are assigned to collections
- Emails are sent, and the item appears in the relevant user(s) 'My DSpace' workspace

- Scenario 1: Head of research

I want to be able to see everything my researchers deposit for quality control purposes



- Scenario 2: Repository manager

I want to approve everything that goes in to the repository to make sure there are no copyright issues or bad metadata



- Scenario 3: Cataloguer

I want to be able to see everything my researchers deposit for quality control purposes



- DSpace has three workflow steps
 1. Accept/Reject Step
 2. Accept/Reject/Edit Metadata Step
 3. Edit Metadata Step

- You can use any combination of the three
 - Steps are worked through in order

- Which might be used in each of the previous scenarios?

- Created during the 'Describe the Collection' stage

Describe the Collection

Please check the boxes next to the statements that apply to the collection. [More Help...](#)

<input checked="" type="checkbox"/> New items should be publicly readable
<input checked="" type="checkbox"/> Some users will be able to submit to this collection
<input type="checkbox"/> The submission workflow will include an <i>accept/reject</i> step
<input type="checkbox"/> The submission workflow will include an <i>accept/reject/edit metadata</i> step
<input type="checkbox"/> The submission workflow will include an <i>edit metadata</i> step
<input type="checkbox"/> This collection will have delegated collection administrators
<input type="checkbox"/> New submissions will have some metadata already filled out with defaults

Next >

- Edit a collection
 - Find the ‘Submission Workflow’ section

Submission Workflow

Submitters:

Accept/Reject Step:

Accept/Reject/Edit Metadata Step:

Edit Metadata Step:

- Click to ‘Create...’ a workflow step

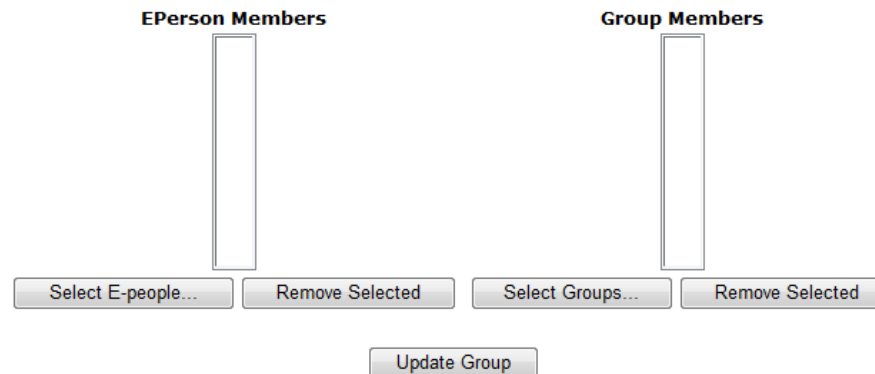
- Select the correct users and/or groups

Edit Group : COLLECTION_83_WORKFLOW_STEP_1 (id: 362)

[Help...](#)

Name: COLLECTION_83_WORK

After making changes to this group you must click the "Update Group" button below.

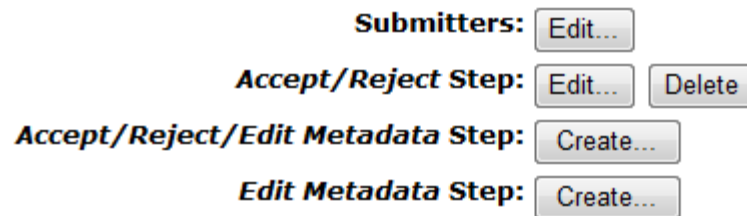


The screenshot shows the 'Edit Group' interface for 'COLLECTION_83_WORK'. It features two columns of member selection options. The left column is titled 'EPerson Members' and contains a vertical list box, a 'Select E-people...' button, and a 'Remove Selected' button. The right column is titled 'Group Members' and contains a vertical list box, a 'Select Groups...' button, and a 'Remove Selected' button. Below these columns is a single 'Update Group' button.

- Press 'Update Group'
 - Note: This creates a DSpace group

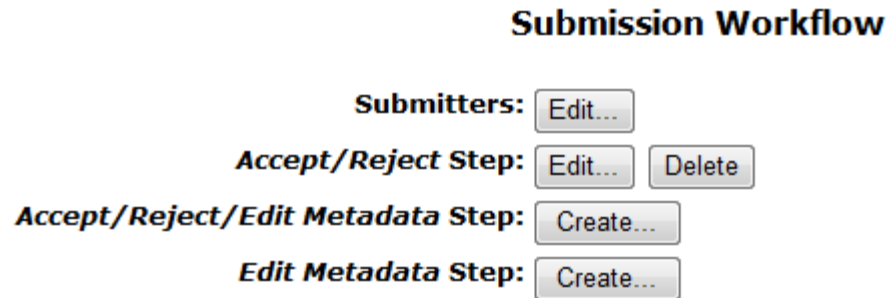
- Edit a collection
 - Find the 'Submission Workflow' section

Submission Workflow



- Click to 'Edit...' a workflow step

- Edit a collection
 - Find the 'Submission Workflow' section



- Click to 'Delete' a workflow step

- Taking a workflow task:
 - Once an item is in a workflow an email will be sent to the relevant users and group members

```
Subject: DSpace: You have a new task
From: dspace@example.org

A new item has been submitted:

Title:          Workflow training package
Collection:     DSpace training materials
Submitted by:   Stuart Lewis (stuart@example.com)

The submission must be checked before inclusion in the archive.

To claim this task, please visit your "My DSpace"
page

Many thanks!

DSpace
```

- Taking a workflow task:
 - The item is in a pool in 'My DSpace'

Tasks in the Pool

Below are tasks in the task pool that have been assigned to you.

Task	Item	Submitted To	Submitted By	
Check Submission	Workflow training package	Art History	Stuart Lewis	<input type="button" value="Take Task"/>

- Taking a workflow task:
 - Preview the task

Preview Task

The following item has been submitted to collection **Art History**. In order to accept the task of checking this item, please click "Accept This Task" below.

Title: Workflow training package
Authors: Lewis, Stuart

Files in This Item:

File	Description	Size	Format
Deposit Plait Logo - small.bmp		122.96 kB	BMP View/Open

Accept This Task

Cancel

- Taking a workflow task:
 - Task options (dependant on the workflow step)

If you have reviewed the item and it is suitable for inclusion in the collection, select "Approve".	<input type="button" value="Approve"/>
If you have reviewed the item and found it is not suitable for inclusion in the collection, select "Reject". You will then be asked to enter a message indicating why the item is unsuitable, and whether the submitter should change something and re-submit.	<input type="button" value="Reject"/>
Select this option to correct, amend or otherwise edit the item's metadata.	<input type="button" value="Edit Metadata"/>
If you wish to leave this task for now, and return to your "My DSpace", use this option.	<input type="button" value="Do Later"/>
To return the task to the pool so that another user can perform the task, use this option.	<input type="button" value="Return Task to Pool"/>

- Create a new collection
- Assign a work flow to the collection
 - Choose the 'Accept/Reject Edit Metadata Step'
 - Assign yourself as a member of the workflow group
- Submit an item to that collection
- Go to 'My DSpace' and complete the workflow
 - If you have time, submit another item, and reject it to see what happens

- These slides have been produced by:
 - Stuart Lewis & Chris Yates
 - Repository Support Project
 - <http://www.rsp.ac.uk/>
 - Part of the RepositoryNet
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