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The DSpace Course - Item Submission Workflows

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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.
What is a 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?
How to create a workflow

- 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...

- New items should be publicly readable
- Some users will be able to submit to this collection
- The submission workflow will include an accept/reject step
- The submission workflow will include an accept/reject/edit metadata step
- The submission workflow will include an edit metadata step
- This collection will have delegated collection administrators
- New submissions will have some metadata already filled out with defaults
How to create a workflow

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

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

- Select the correct users and/or groups

  Edit Group: COLLECTION_83_WORKFLOW_STEP_1 (id: 362)  
  Name: COLLECTION_83_WORK

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

  EPerson Members  Group Members
  Select E-people... Remove Selected  Select Groups... Remove Selected

- Press ‘Update Group’
  - Note: This creates a DSpace group
How to edit a workflow

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

- Click to ‘Edit...’ a workflow step
How to delete a workflow

- 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’
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:**

<table>
<thead>
<tr>
<th>File</th>
<th>Description</th>
<th>Size</th>
<th>Format</th>
<th>View/Open</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deposit Plait Logo - small.bmp</td>
<td></td>
<td>122.96 kB</td>
<td>BMP</td>
<td>View/Open</td>
</tr>
</tbody>
</table>

[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".

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.

Select this option to correct, amend or otherwise edit the item's metadata.

If you wish to leave this task for now, and return to your "My DSpace", use this option.

To return the task to the pool so that another user can perform the task, use this option.
Practical exercise: Create a collection + workflow

- 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:

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