The DSpace Course - Item Submission Workflows

Lewis, Stuart

http://hdl.handle.net/10673/64

Downloaded from DSpace Repository, DSpace Institution's institutional repository
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)

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

- 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

<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)

<table>
<thead>
<tr>
<th>Action</th>
<th>Button</th>
</tr>
</thead>
<tbody>
<tr>
<td>If you have reviewed the item and it is suitable for inclusion in the collection, select &quot;Approve&quot;.</td>
<td>Approve</td>
</tr>
<tr>
<td>If you have reviewed the item and found it is <strong>not</strong> suitable for inclusion in the collection, select &quot;Reject&quot;. 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.</td>
<td>Reject</td>
</tr>
<tr>
<td>Select this option to correct, amend or otherwise edit the item's metadata.</td>
<td>Edit Metadata</td>
</tr>
<tr>
<td>If you wish to leave this task for now, and return to your &quot;My DSpace&quot;, use this option.</td>
<td>Do Later</td>
</tr>
<tr>
<td>To return the task to the pool so that another user can perform the task, use this option.</td>
<td>Return Task to Pool</td>
</tr>
</tbody>
</table>
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:

- Stuart Lewis & Chris Yates
- Repository Support Project
  - http://www.rsp.ac.uk/
- Part of the RepositoryNet
- Funded by JISC
  - http://www.jisc.ac.uk/