



Digital Repository

Training Manual

This manual is meant to be a guide to some of the more common processes within the UT Digital Repository (UTDR). If you are unable to find what you need, please contact Colleen Lyon, Digital Repository Librarian, at utdr-general@utlists.utexas.edu

ROLES

There are three roles within the Repository administrative interface:

- 1) Sub-Community Administrators/Collection Administrators (Collection Administrators are also referred to as Collection Curators)
- 2) Reviewers
- 3) Submitters

Sub-Community Administrators/Collection Administrators

- ✓ Can create workflow steps
- ✓ Can add a logo and description to community and collection home pages
- ✓ Can add submitters to a collection and can add people to workflow steps
- ✓ Can edit descriptive information (referred to as metadata in UTDR) about works in a collection after they have been committed to the archive (i.e. published in the Repository)
- ✓ Can map works from one collection to another collection (cross-reference)
- ✓ Can withdraw works from a collection
- ✓ Can create a metadata template for recurring metadata across a collection

Reviewers

- ✓ Are responsible for taking tasks in the workflow steps
- ✓ Have tasks such as reviewing, editing, and approving works submitted
- ✓ Will receive emails for each new work requiring review

Submitters

- ✓ Can upload (submit) new works to collections

INSTRUCTIONS FOR ADMINISTRATORS

HOW TO CREATE A COLLECTION & ASSIGN ROLES

Sub-community administrators can add new collections to their sub-community.

Important! Before you can add collection administrators, submitters or reviewers to your collection, you must have each person do an initial login to the Repository with their EID and password. If they do not do an initial login, you will not be able to add them. The initial login creates an “e-person” in the Repository.

- 1) Login to Repository
- 2) Click **Communities and Collections** under BROWSE in the right-hand navigation bar
- 3) Click the title of the sub-community you want to add the collection to
- 1) Click **Create Collection** under CONTEXT in the right-hand navigation bar - here you will be able to add the following information about your collection:
 - ✓ Name of collection (required)
 - ✓ Short description of collection (optional)
 - ✓ Introductory text to your collection (optional)
 - ✓ Copyright text (optional)
 - ✓ News about your collection (optional)
 - ✓ Provenance (optional) – provenance is the history of ownership of materials prior to acquisition by the current institution. Typically used to refer to art collections or historical materials.
 - ✓ You can also upload a logo or image by browsing to the file on your local computer
- 4) Once you have added your content, click **Create** at the bottom of the page
- 5) Your screen should switch to the Assign Roles tab within the EDIT COLLECTION menu
- 6) To add an Administrator for the collection, click **Create** to the right of the Administrators option
 - a. Type the last name of the person you wish to add in the Search members to add box
 - b. Click the **E-Person** button to search for that person’s name
 - c. Click **ADD** next to the person’s name you wish to add
 - d. Then click **SAVE**
- 7) To add reviewers, click **Create** for the workflow step you want to choose for your collection (see *Instructions for Reviewers* for more information about workflow steps).
 - a. For a 1-step workflow, select the Accept/Reject/Edit Metadata Step and follow steps a-d from # 6 above
 - b. For a 2-step workflow, follow steps a-d from # 6 above for the Accept/Reject Step and again for the Edit Metadata Step
- 8) To add submitters, click **Create** to the right of the Submitters option
 - a. Follow steps a-d from # 6 above
- 9) When you are finished assigning roles for the collection, click on **Return**

HOW TO CUSTOMIZE YOUR SUB-COMMUNITY PAGE (add logo, introductory text, copyright info, etc.)

- 1) Login to Repository
- 2) Click **Communities and Collections** under BROWSE in the right-hand navigation bar
- 3) Click the name of the sub-community you want to customize
- 4) Click **Edit Community** under CONTEXT in the right-hand navigation bar – here you will be able to add and edit the following information about your sub-community:

- ✓ Name of sub-community (required)
 - ✓ Short description of sub-community (optional)
 - ✓ Introductory text to sub-community (optional)
 - ✓ Copyright text (optional)
 - ✓ News about your sub-community (optional)
 - ✓ You can also upload a logo or image by browsing to the file on your local computer
- 5) Once you have made your changes, click **Update** at the bottom of the page

You can also customize each collection page, if you wish to do so. The directions for customizing collection pages are very similar to customizing your sub-community page.

HOW TO CUSTOMIZE YOUR COLLECTION PAGE(S) (add logo, introductory text, copyright info, etc.)

- 2) Login to Repository
- 3) Click **Communities and Collections** under BROWSE in the right-hand navigation bar
- 4) Click the title of the collection you want to customize
- 5) Click **Edit Collection** under CONTEXT in the right-hand navigation bar – here you will be able to add and edit the following information about your collection:
 - ✓ Name of collection (required)
 - ✓ Short description of collection (optional)
 - ✓ Introductory text to your collection (optional)
 - ✓ Copyright text (optional)
 - ✓ News about your collection (optional)
 - ✓ Provenance (optional) – provenance is the history of ownership of materials prior to acquisition by the current institution. Typically used to refer to art collections or historical materials.
 - ✓ You can also upload a logo or image by browsing to the file on your local computer
- 6) Once you have made your changes, click **Update** at the bottom of the page

HOW TO EDIT ROLES IN YOUR COLLECTION(S)

Editing roles means you can:

- ✓ Add new submitters
- ✓ Delete submitters
- ✓ Add reviewers
- ✓ Delete reviewers

Important! Before you can add new submitters or reviewers to your collection, you must have each person do an initial login to the Repository with their EID and password. If they do not do an initial login, you will not be able to add them as submitters or reviewers. The initial login creates an “e-person” in the Repository.

- 1) Login to Repository
- 2) Click **Communities and Collections** under BROWSE in the right-hand navigation bar
- 3) Click the title of the collection you want to edit
- 4) Click **Edit Collection** under CONTEXT in the right-hand navigation bar
- 5) Click **Assign Roles** at the top of the page under the title of your collection
- 6) To add submitters, click the underlined text **Collection X Submit**. To add reviewers, click the underlined text **Collection X Workflow Step X**. It's possible that your collection may list NONE

for submitters and/or workflow steps. If so, you can click on the **Create** option on the right side of the screen instead.

- 7) Type the last name of the new submitter or reviewer in the Search members to add box
- 8) Click the **E-Person** button to search for the name of your new submitter or reviewer
- 9) Click **ADD** next to the person's name you wish to add
- 10) Then click **SAVE**

To remove a person from the submitter or reviewer list, follow the same directions above, except that rather than searching for the e-person, you can just click the **Remove** button next to the name you wish to remove from the list.

HOW TO EDIT METADATA (DESCRIPTIVE INFORMATION) OF APPROVED WORKS

If you need to edit any of the descriptive information about a work after it has been approved and committed to the Repository, you may do so by following these directions:

- 1) Login to Repository
- 2) Find the work you wish to edit by doing a search or browse
- 3) Click **Edit this work** under CONTEXT in the right-hand navigation bar
- 4) Click **Work Metadata** at the top of the page under the blue line
- 5) Use the pull down menu to add metadata, or edit the metadata directly in the text boxes
- 6) Click **Update**

HOW TO MAP WORKS FROM ONE COLLECTION INTO ANOTHER COLLECTION (ITEM MAPPER)

- 1) Login to Repository
- 2) Click **Communities and Collections** under BROWSE in the right-hand navigation bar
- 3) Click the title of the collection where you want the work to appear
- 4) Click **Item Mapper** under CONTEXT in the right-hand navigation bar
- 5) In the search box, enter the title of the item you want to map into the new collection
- 6) Click **Search works**
- 7) Click the check box next to the work you want to map
- 8) Click the **Map selected works** button at the top of the page

HOW TO SET UP A METADATA TEMPLATE

The metadata template is used when you have metadata elements whose value is the same across the whole collection; you can set up a metadata template to pre-populate those elements. For example, if every work in your collection will have the same description, you can pre-populate that description in the metadata template so that it will automatically be applied to each work submitted to that collection.

- 1) Login to Repository
- 2) Click the title of the collection you wish to apply the template to
- 3) Click **Edit Collection**
- 4) Scroll down to the bottom of the page and click the **Create** button next to Work template
- 5) Click the **Work Metadata** tab
- 6) Find the name of the metadata element in the pulldown menu
- 7) Add the value to the box
- 8) Click the **Add new metadata** button

HOW TO WITHDRAW WORKS IN A COLLECTION

Sub-community administrators have the ability to withdraw works in a collection. Withdrawing a work does not mean the work is completely expunged from the Repository. The UTDR Administrators still have access to withdrawn works and may reinstate those works if a work is withdrawn by mistake.

- 1) Login to Repository
- 2) Navigate to the work to be withdrawn
- 3) Click **Edit this Work** under CONTEXT in the right-hand navigation bar
- 4) Click **Withdraw**

INSTRUCTIONS FOR REVIEWERS

Reviewers are responsible for checking works submitted to collections. Reviewers are assigned to what the Repository calls Workflow Steps.

The workflow steps aid in the process of quality control for your collections. Every time a new work is submitted to one of your collections, the quality control workflow begins. Each workflow step has a task associated with it.

Workflow steps in the UTDR:

There are two workflow options available: a **1-step workflow** OR a **2-step workflow**

- ✓ The **1-step workflow** uses only **Step 2**
- ✓ The **2-step workflow** uses **Steps 1 and 3**

Step 1: Accept/Reject Step

The people responsible for this step are able to accept or reject incoming submissions. However, they are not able to edit the submission's metadata.

Step 2: Accept/Reject/Edit Metadata and Commit to Archive Step

The people responsible for this step are able to edit the metadata of incoming submissions, and then accept or reject them.

Step 3: Edit Metadata and Commit to Archive Step

The people responsible for this step are able to edit the metadata of incoming submissions, but will not be able to reject them.

So, how does it work?

First, a submitter needs to submit his/her work; a work may consist of one file or multiple files. Once a submission is done, the submitter will get a message on the screen that looks like this (the following assumes a 1-step workflow):

Submission complete

Your submission will now go through the review process for this collection. You will receive e-mail notification as soon as your submission has joined the collection, or if there is a problem with your submission. You may also check on the status of your submission by visiting your submissions page.

Meanwhile, the person, or persons, that are responsible for Step 2, will get this email message:

A new work has been submitted:

Title: My life as a librarian
Collection: UT Faculty/Researcher Works
Submitted by: Colleen Lyon (c.lyon@austin.utexas.edu)

The submission must be checked before inclusion in the archive.

To claim this task, please visit your "My Account" page:
<http://dspace2.lib.utexas.edu/mydspace>

The reviewer who gets this message will need to go to her/his **submissions** page under MY ACCOUNT, in the right-hand navigation bar on the main page, or simply click on the link in the email message. Each step in the review workflow is defined as a "task". The reviewer needs to "claim" or take the task before he/she can work on it. Under **Tasks in the Pool**, check the box near **Awaiting editor's attention** and click on **Take selected tasks**. Now you will "own" that task. Notice that the task you have just claimed moves up to the **Tasks you own** section. In order to actually review the submitted work, click on the work title or on the task itself. In both cases you will get to the actual work you need to review.

Step 2: Approve (=commit to Repository), Reject, Edit metadata, or return task to pool.

What do you need to ask yourself here?

- ✓ Does the submitted work indeed belong to the collection it was submitted to?
- ✓ Was the metadata entered correctly?
- ✓ Are there typos?
- ✓ Does the actual file look okay?
- ✓ Is the content appropriate?
- ✓ Is the quality of the descriptive information and the file itself acceptable?

First, decide whether the work can be accepted or should be returned to the submitter for improvements and resubmission. In order to answer those questions, you need to click on the **show full record** button to see all of the associated metadata and you need to open the file itself.

Rejection:

If you have reviewed the work 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 work is unsuitable, and whether the submitter should change something and resubmit. You would then click **Reject item**. The submitter will get an email message that looks like this:

You submitted: This is a test by Tester Choice

To collection: UT Faculty/Researcher Works

Your submission has been rejected by Colleen Lyon (c.lyon@austin.utexas.edu), and has not been accepted due to one of the following reasons:
-One or more required fields are empty or missing information;
please repeat the description workflow of your work and resubmit.

This is not appropriate for several reasons! -**This is the reason entered by the reviewer**

Please refer to the Contact Us section in the Repository website at <http://repositories.lib.utexas.edu/contact> in order to contact the Collection Curator with further questions.

Your submission has not been deleted. You can access it from your My Account page: <http://dspace2.lib.utexas.edu/mydspace>

Once the submitter resubmits his or her work, the review process will resume.

Return to task pool:

This option is available in case you decide you'd prefer someone else in the reviewers group to take the task. Click on **Return to task pool**; this will generate an email message similar to the first one, which will be sent to the reviewers group again. Now, someone else can claim that task.

Edit metadata:

When you click on **Edit metadata** you actually repeat the submission steps previously done by the submitter. You will then have the option to fix errors or add additional metadata as you please. You need to click next after every screen in order to move forward. Once you click complete submission you will be taken back to the four options – approve, reject, edit metadata, or return to task pool.

Approval:

If you approve* the submission, click on **Approve work**.

**Note that here, approve actually means commit to Repository; this is the final step in which the work is ingested into the Repository and added to the collection.*

The submitter will then get a message that looks like this:

You submitted: This is a test by Tester Choice

To collection: UT Faculty/Researcher Works

Your submission has been accepted and archived in the Repository, and it has been assigned the following identifier:
<http://hdl.handle.net/123456789/13490>

Please use this identifier when citing your submission. If you have any questions at this point, please refer to the contact us section in the Repository website.

You, as the reviewer, would be taken back to your Submissions & workflow tasks page.

INSTRUCTIONS FOR SUBMITTERS

Submitters are people who can upload files to collections. People must be assigned to the role of Submitter in the Repository administrative interface before they can submit. See the section on *How to Edit Roles* for more details.

The submission process is the function that enables users to add a work to the Repository. The process of submission includes uploading the file(s) comprising the digital work and entering the descriptive information about the work.

Submitting a work to the Repository is a multi-step process. At any point in the submission process you can stop and save your work for a later date by clicking on the **Exit, Save, or Delete Work** button at the bottom of the page. The data you have already entered will be stored until you return to the submission, and you will be reminded on your MY ACCOUNT page that you have a submission in process. If somehow you accidentally exit from the submission process, you can always resume from your MY ACCOUNT page. You can also cancel your submission at any point.

HOW TO SUBMIT (UPLOAD FILES)

- 1) Login to Repository
- 2) Click **Communities and Collections** under BROWSE in the right-hand navigation bar
- 3) Click the title of the collection you wish to submit to
- 4) Click **Submit a new work to this collection**
- 5) Begin the submission process by clicking the license agreement and then uploading your file(s). The interface will guide you through the submission process.
- 6) Once submission is done, you will get a message on the screen that looks like this:

Submission complete

Your submission will now go through the review process for this collection. You will receive e-mail notification as soon as your submission has joined the collection, or if there is a problem with your submission. You may also check on the status of your submission by visiting your submissions page.

Once the item you submitted is reviewed and approved, you will get a message like this:

You submitted: This is a test by Tester Choice

To collection: UT Faculty/Researcher Works

Your submission has been accepted and archived in the Repository, and it has been assigned the following identifier:

<http://hdl.handle.net/123456789/13490>

Please use this identifier when citing your submission. If you have any questions at this point, please refer to the contact us section in the Repository website.

See the section, *Instructions for Reviewers*, for more information about the review process.

HOW TO ASSIGN A PRIMARY FILE IN A WORK SUBMISSION

When uploading more than one file in a work submission, you have the ability to assign one of the files as the primary file. This means that the file will be listed first in the work record.

The second step of the submission process is to **Upload file(s)**. When uploading more than one file, you will click the button **Upload file and add another**. Once all files have been uploaded, you will see a list of all files uploaded at the bottom of the screen. To the left of each file you will see a column called **Primary**. Here you can select the file you wish to be the primary file.

HOW TO ASSIGN FILE DESCRIPTIONS

File descriptions can be very important when you have multiple files in a work. For example, if you are uploading an audio file and a transcript, it may be important to add a file description to each file noting what each part is. The file descriptions will show up in a work record like this:

Files	Size	Format	View	Description
a20a.mp3	28.57MB	audio/mpeg	View/Open	Conversation Part 1
a20phonefriends.pdf	1.749MB	application/pdf	View/Open	Transcript

To add file descriptions, you simply add a description in the **File Description** box in the upload step of the submission process. The File Description box is underneath the box where you Browse to find the files you are uploading.

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