IsoveraDL User Guide

Definitions

IsoveraDL Access Page:
This is the Login page for IsoveraDL. This is the page that a user will land in when she visits IsoveraDL prior to logging in.

User Home Page

This is the page you will be redirected to after successful login. This page gives the users link to access all areas she is permitted to access based on her Group.

Metadata Record Cataloging Forms

These are forms for submitting/cataloging new Metadata Records to IsoveraDL, formerly known as Input Processes.

Input Type

Input Type	Description
Author or Editor	Inputs for First and Last Name (Author only), Email, Institution, Department and Date of Contribution/Publication
Checkbox	Check multiple items provided in checkbox list. The list is generated using selected Controlled Vocabulary Terms
Date	Three dropdowns to select month day and year
File	Upload file form local machine
Multi Line Text	Multiple lines of text input
Multi Select	Select multiple items from drop down. The drop down list is generated using selected Controlled Vocabulary Terms
Select	Select single item from drop down. The drop down list is generated using selected Controlled Vocabulary Terms
Single Line Text	Single line text input.
URL	Single line entry for Resource URL.

Peer Review Page

This is the page you will be redirected to after clicking ‘Peer Review’ link from the menu bar or ‘Perform peer review tasks’ link from User Home Page. This page gives the users link to perform peer review task that she is permitted to access based on her Group.

1. User and Profile Management

1.1 User Registration	
Which users have access to this page?	All
What does this functionality allow me to do?	Create account to gain access to restricted sections of IsoveraDL.
Which page do I have to be in to access this functionality?	IsoveraDL Access Page
Steps	1. Click on the "Register for a new account" link. • You will be redirected to the Registration page. 2. Fill in the form. • The fields marked with a * (star) are required. • Username must be at least 6 characters. • Username and Email must be unique to the system. 3. Click Save
Result	An account is created for you in IsoveraDL. You will be redirected to your User Home Page. Note: By default your user group is set to Browser. If you require a higher level of access ask the IsoveraDL Admin to go in and change you group if necessary.
Things to look out for	At step 2 if you a. do not enter all the required fields b. enter an username or email that is already in the system c. enter a username which is less than 6 characters The system will reload the page with all the data you had previously entered and display an error message specifying exactly which fields you need to change.

1.2 Login	
Which users have access to this page?	All
What does this functionality allow me to do?	Log in to gain access to the restricted sections of IsoveraDL
Which page do I	IsoveraDL Access Page

have to be in to access this functionality?	
Steps	1. Enter Username and Password. 2. Click “Login”.
Result	You will be logged in to the system and redirected to User Home Page.
Things to look out for	At step 1 if you enter wrong Username or Password the system will reload the page and display an error message indicating that Username and/or Password is wrong.

1.3 Retrieve Password	
Which users have access to this page?	All users who have an account in IsoveraDL
What does this functionality allow me to do?	Retrieve password via email.
Which page do I have to be in to access this functionality?	IsoveraDL Access Page
Steps	1. Click on the “Forgot your password?” link 2. Enter Email and/or Username. 3. Click “Retrieve Password”.
Result	System will send an email to the email address email address you provided during registration with your Username and Password. You will be redirected to the IsoveraDL Access Page
Things to look out for	At step 1 if you enter wrong Email and Username the system will redirect you to the IsoveraDL Access Page and display an error message indicating that Email and/or Username was not found in the system.

1.4 Edit Profile	
Which users have access to this page?	All
What does this functionality allow me to do?	Edit your profile information.
Which page do I have to be in to	User Home Page

access this functionality?	
Steps	1. Click on the “Edit Profile” link from User Home Page. • You will be redirected to the “Edit Profile” page. 2. System displays a form similar to the registration form with your existing profile information pre-populated. Edit the form: • You can edit previously saved username, first name, last name, email, phone, organization and address. • The fields marked with a * (star) are required. • Username must be 5 to 10 character long. • Email field must be a valid email address. 3. Click “Save” button.
Result	The modified profile information is saved in the system. You will be taken back to User Home Page.
Things to look out for	At step 2 if you do not enter one of the required fields, the system will reload the page and display an error messages indicating what went wrong.

1.5 View All Users	
Which users have access to this page?	Collection Administrator
What does this functionality allow me to do?	View a list of all existing users to view/update their information or changed their user group..
Which page do I have to be in to access this functionality?	‘User Home Page’ and ‘User and Profile Management’
Steps	1. Click on the “View all users” link from User Home Page or the “View all users” link in the User and Profile Management Page.
Result	System displays a list containing the all user information in the system.

1.6 Add User	
Which users have access to this page?	Collection Administrator
What does this functionality allow me to do?	Add new users to the system.

Which page do I have to be in to access this functionality?	User Home Page and View All Users.
Steps	1. Click on the "Add a new user" link from User Home Page or "Add User" link from View All Users page. • You will be redirected to the "Add User" page 2. Fill in the form. • The fields marked with a * (star) are required. • Username must be 5 to 10 character long. • Username and Email must be unique to the system • Email field must be a valid email address. 3. Click "Save" button.
Result	A new user account is created in IsoveraDL for the user. You will be redirected to the View All Users page.
Things to look out for	At step 2 if you a. do not enter the required fields b. enter an username or email that is already in the system c. Enter a username which is less than 5 characters or more than 10 characters. The system will reload the page with all previously entered data and display an error message specifying what went wrong. The user information you entered is not yet saved in the system.

1.7 Edit User	
Which users have access to this page?	Collection Administrator
What does this functionality allow me to do?	Modify details of an existing user.
Which page do I have to be in to access this functionality?	View All Users.
Steps	1. Click on the "Edit" link from View All Users page. • You will be redirected to the "Edit User" page 2. System displays the registration form with profile information for the user pre-populated. Edit the form. • The fields marked with a * (star) are required. • Username must be 5 to 10 character long. • Username and Email must be unique to the system • Email field must be a valid email address.

	3. Click “Save” button.
Result	Modified user information is saved to the database. You will be redirected to the View All Users page.
Things to look out for	At step 2 if you a. do not enter the required fields b. enter an username or email that is already in the system c. Enter a username which is less than 5 characters or more than 10 characters. The system will reload the page with all previously entered data and display an error message specifying what went wrong. The user information will not be modified in the system.

1.8 Change Password	
Which users have access to this page?	All registered users.
What does this functionality allow me to do?	Change your password.
Which page do I have to be in to access this functionality?	User Home Page
Steps	1. Click on the “User/Profile Management” link at the top of the page. You will be taken to the User and Profile Management page. Click on the “change password” link. You will be taken to the Change Password page. 2. Enter your Current Password, a New Password and repeat the New Password in the appropriate boxes. • All the fields are required. 3. Click “Change Password”.
Result	The new password will be saved in the system. You will be taken back to User Home Page.
Things to look out for	At step 2 if you do not enter one of the fields, or enter a wrong existing password, or if the New Password and the Repeat New password fields do not match, the system will reload the page and display an error messages indication what went wrong.

2. Metadata Fields Management

2.1 View All Metadata Fields	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	View a list of all existing Metadata Fields to view/update details of individual fields.
Which page do I have to be in to access this functionality?	User Home Page
Steps	1. Click on the “Metadata Fields” link from the menu bar or the “View Metadata Fields” link in the User Home Page
Result	System displays a list containing the summaries of all Metadata Fields.

2.2 Add Metadata Field	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	Add a custom Metadata Field to the Metadata Structure. You will need to do so for Metadata Fields that are required by your organization but not available in IsoveraDL.
Which page do I have to be in to access this functionality?	2.1 View All Metadata Fields
Steps	1. Click on the “Add a custom Metadata Field” link. • You will be redirected to the Add New Metadata Field page. 2. Fill in the form • All fields are required. • **Name**: Provide the name of the Metadata Field. The field will be represented throughout the system by this name. • **Short Name**: Provide an alphanumeric identifier for the field to be used in the background. This may not contain spaces. • **Required**: Indicate if this field is required in all

	Metadata Record Cataloging Forms. If "Yes" is selected then this field must be added to all Metadata Record Cataloging Forms (See below for instructions on how to Add Metadata Field to Metadata Record Cataloging Form). If the field is not added to a Metadata Record Cataloging Form, users will not be able to Upload Metadata Record since this required field will be missing in the entered data. • **Multiplicity**: Indicate whether a Metadata Record Cataloging Form should allow users to enter multiple values of this field. Results in an "Add Another" button being presented to the User in the Metadata Record Cataloging Form for this field. • **Type**: Indicate the Input Type for this Metadata Field. • **Controlled Vocabulary**: This will appear in the form if Classification or Controlled Vocabulary Term is selected as the Type. Indicate which Controlled Vocabulary terms will be used to populate the options drop down in the Metadata Record Cataloging Form when this field is added to the Form. 3. Click "Add Field"
Result	The Metadata Field is added to the system and is saved in the system. You will be taken back to View All Metadata Fields Page
Things to look out for	At step 2 if you do not enter one of the fields the system will reload the page and display an error message indication what went wrong.

2.3 Edit Metadata Field	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	Edit an existing Metadata Field
Which page do I have to be in to access this functionality?	View All Metadata Fields
Steps	1. Click on the "Edit" link of a Metadata Field. • You will be redirected to the Edit Metadata Field page. 2. System displays the pre-populated form with information previously recorded. Edit the form. • The system will provide you with the following options: Name, Short Name, Required, Multiplicity, Type, Controlled Vocabulary.

	• If an existing Metadata Record Cataloging Form uses a Metadata Field or there is data for that field in an existing Metadata Record, then it is not possible to modify any options except 'Name' field. 3. Click "Save Edits"
Result	The modifications to the Metadata are saved in the system. You will be taken back to View All Metadata Fields Page
Things to look out for	At step 2 if you do not enter one of the fields, the system will reload the page and display an error message indication what went wrong.

3. Controlled Vocabulary Management

3.1 View All Controlled Vocabularies	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	View a list of all existing Controlled Vocabularies to view/update details to the vocabularies or to create mappings between Controlled Vocabularies.
Which page do I have to be in to access this functionality?	User Home Page
Steps	1. Click on the "Controlled Vocabularies" link from the menu bar or the "View controlled vocabularies" link in the User Home Page
Result	The system displays the list of controlled vocabularies in the system including the Name, Short Name and Description for each controlled vocabulary.

3.2 View Details of Controlled Vocabulary	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	View the details of an existing controlled vocabulary.
Which page do I have to be in to access this functionality?	View All Controlled Vocabularies
Steps	1. Click on the "View Details" link from View All Controlled Vocabularies page
Result	The system will display the details of the selected controlled vocabulary including the name, short name, description, terms with hierarchy level and mapping details if it is mapped to other control vocabularies.

3.3 Add Controlled Vocabulary	
Which users	Collection Administrator and Collection Manager

have access to this page?	
What does this functionality allow me to do?	Add a new custom controlled vocabulary to the system.
Which page do I have to be in to access this functionality?	User Home Page or View All Controlled Vocabularies
Steps	1. Click on the "Add a new controlled vocabulary" link from the User Home Page or "Add controlled vocabulary" link from the View All Controlled Vocabularies page. • You will be redirected to the Add a new Controlled Vocabulary page. 2. Fill in the form • **Name**: Provide the name of the Controlled Vocabulary. The Controlled Vocabulary will be represented throughout the system by this name. This is a required field. • **Short Name**: Provide an alphanumeric identifier for the field to be used in the background. This is required field and needs to be unique. • **Description**: This is optional field. You may enter a description for newly created controlled vocabulary. • **Term**: You must enter at least one term for this controlled vocabulary according to the inline instruction of this page. 3. Click "Add Controlled Vocabulary" 4. You will be taken to "Confirm Controlled Vocabulary" page. Here the system will display the all information you had entered in step 2 and ask for confirmation. 5. Click "Confirm changes"
Result	The Controlled Vocabulary will be saved in the system. You will be taken back to View All Controlled Vocabularies Page.
Things to look out for	At step 2 if you do not enter one of the required fields, the system will reload the page and displays an error message indicating what went wrong.

3.4 Edit Controlled Vocabulary	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality	Edit an existing controlled vocabulary in the system.

allow me to do?	
Which page do I have to be in to access this functionality?	View All Controlled Vocabularies
Steps	1. Click on the "Edit" link from the list in View All Controlled Vocabularies page. • You will be redirected to the "Edit Controlled Vocabulary" page. 2. The system will display a form pre-populated with information about the Controlled Vocabulary that was previously saved in database. Edit the form. • You can edit previously saved name, short name, description and terms. • Name, short name and terms are required field. • The short name may not be edited if it is in use in an existing Metadata Record Cataloging Form or Metadata Record. 3. Click "Save the Controlled Vocabulary" 4. You will be taken to "Confirm Controlled Vocabulary" page. Here the system will display the all information that had just entered in step 2 and ask for confirmation. 5. Click "Confirm changes"
Result	The Controlled Vocabulary is modifications will be saved in the system. You will be taken back to View All Controlled Vocabularies Page.
Things to look out for	At step 2 if you do not enter one of the required fields, system will reload the page and displays an error message indication what went wrong.

3.5 Manage Controlled Vocabulary Mappings	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	Map Terms of a Controlled Vocabulary to the Terms of a different one. Normally you would use the mapping features to map the Terms of a custom Controlled Vocabulary that was not originally available in the system but is required by your organization to the Terms on an existing Controlled Vocabulary
Which page do I have to be in to access this functionality?	View All Controlled Vocabularies
Steps	CV1: Controlled Vocabulary you want to be mapped.

<table>
<tr><td></td><td>CV2: Controlled Vocabulary you want to map to CV1
1. Select CV2 from the drop down list in the Actions column of CV1.
2. Click on the “Map To” button in the Actions column of CV1
• You will be redirected to the Map Controlled Vocabulary Terms page.
• Initially you will see a table containing the Unmapped Terms of CV1 and CV2.
• On the left you will see the Terms of CV1 and on the right you will see the Terms of CV1
• You may map multiple CV1 Terms to a single CV2 Term.
• You must map all CV1 Terms to at least one CV2 term
• You will be able to re-map terms as many times as you wish before you finish. The mappings will not be finalized until you confirm that the mappings are completed.
3. Select one or more CV1 terms and then select one term from CV2 that you want the selected CV1 terms to be mapped to
4. Click on the “Map These Terms” button.
• You will see another table called “Mapped Terms” on the page which displays the mappings you just created.
• The CV1 terms you have already mapped will appear in the “Mapped Terms” table and disappear from the “Unmapped Terms” table.
• You may undo these mappings by checking the check box on the row of the mapping you want to undo and clicking on the “Undo Selected Mapping” button at the bottom of the table.
5. Repeat steps 3 and 4 until all CV1 terms are mapped to one or more CV2 terms. In other words, all CV1 terms need to be covered but it is not necessary to cover all CV2 terms.
6. Click on the “Save Mappings” button at the bottom of the “Mapped Terms” table.</td></tr>
<tr><td>Result</td><td>CV1 will be mapped to CV2. When your collection is harvested to the BEN portal the system will know how to catalog Terms in your custom Controlled Vocabulary using the Terms of CV2.
Note that once you have mapped CV1 terms to CV2 terms there is no way of editing/deleting these mappings. Should you need to do so, please contact Isovera.</td></tr>
<tr><td>Things to look out for</td><td>At step 6, if you have not covered all CV 1 terms the page will be reloaded and you will be asked to map all CV1 terms to at least one CV2 term.</td></tr>
</table>

4. Metadata Record Cataloging Forms Management

4.1 View All Metadata Record Cataloging Forms	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	View the list of all existing Metadata Record Cataloging Forms to preview, edit, enable, disable, copy or delete individual Cataloging Forms.
Which page do I have to be in to access this functionality?	User Home Page
Steps	1. Click on the "Cataloging Forms" link from the menu bar or the "View all Metadata Record Cataloging/Submission Forms" link in the User Home Page.
Result	1. The system will display the list of all Metadata Record Cataloging Forms the list of all Metadata Fields associated with each form. 2. You can preview, edit, enable, disable, copy or delete this process by clicking the appropriate link right under the title of each Cataloging Form.

4.2 Preview Metadata Record Cataloging Form	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	Preview the Metadata Record Cataloging Form to see exactly how it will be viewed as by users when they upload a record using this form.
Which page do I have to be in to access this functionality?	View All Metadata Record Cataloging Forms
Steps	1. Click on the "Preview" link from under the Submission Form heading from View All Metadata Record Cataloging Forms page.
Result	The system will display the preview of Metadata Record Cataloging Form.

<table>
<tr><th colspan="2">4.3 Copy Metadata Record Cataloging Form</th></tr>
<tr><td>Which users have access to this page?</td><td>Collection Administrator and Collection Manager</td></tr>
<tr><td>What does this functionality allow me to do?</td><td>Add a new Metadata Record Cataloging Form to the system by creating a duplicate of an existing Cataloging Form. This is the only way to add a new Metadata Record Cataloging Form to the system.</td></tr>
<tr><td>Which page do I have to be in to access this functionality?</td><td>View All Metadata Record Cataloging Forms</td></tr>
<tr><td>Steps</td><td>1. Click on the “Copy” link from under the Submission Form heading from View All Metadata Record Cataloging Forms page.
• The system will prompt you for confirmation.
2. Click “OK” button to copy this Metadata Record Cataloging Form.</td></tr>
<tr><td>Result</td><td>• A new Metadata Record Cataloging Form will be created and will contain the same Metadata Fields as the one it was copied from.
• All the attributes of newly created submission will be same except the name and prompt of Submission Form. The text “Copy of” will be added at the beginning of Submission Form’s name. The text “(via copy of the first input form)” will be added at the end of Submission Form prompt. The system will display a message indicating that new Metadata Record Cataloging Form is created.
• You must now enable this newly created form in order for it to become usable by the users.
• Make sure to edit at least the “name” and the “prompt” for the new Form.</td></tr>
</table>

<table>
<tr><th colspan="2">4.4 Edit Metadata Record Cataloging Form</th></tr>
<tr><td>Which users have access to this page?</td><td>Collection Administrator and Collection Manager</td></tr>
<tr><td>What does this functionality allow me to do?</td><td>Modify an existing Metadata Record Cataloging Form. Particularly after you have just added a new Form by copying an existing one.</td></tr>
<tr><td>Which page do I have to be in to access this</td><td>View All Metadata Record Cataloging Forms</td></tr>
</table>

functionality?	
Steps	1. Click on the "Edit" link from under the Submission Form heading from View All Metadata Record Cataloging Forms page. • You will be redirected to the "Edit Metadata Record Cataloging Form" page. 2. System will display a form pre-populated with information previously saved for the Cataloging Form. Edit the form. • The fields marked with a * (star) are required. • At the top of the page the properties of the Cataloging Forms are displayed. • In the section below the properties of the Metadata Fields in this Form are displayed. 3. If you want your Cataloging Form to contain multiple pages you may add more pages to the Form by clicking on the "Add a page to the end of this input process" button at the bottom of the page. Once you create a new page you may change the order the Catalogers will see these pages by clicking on the "Move this page to the right" and "Move this page to the left" buttons at the bottom of each Page. 4. You can Add/Edit Fields to each page of the Cataloging form by clicking on the 'Add a field to the end of this page' button at the bottom of the page. 5. The positions of Metadata Fields within the Cataloging Form reflect the exact order they will appear when users come to use this Form. You may change the order of fields by clicking 'Move this field up' or 'Move this field down' links that are available for each Field. 6. You may remove fields from the Form by clicking on the 'Remove this field' link. However, if the Metadata Field is a Required Field you will not be able to save the Cataloging Form until you have added the Field to any Page of the Cataloging Form. 7. Click the 'Save and Finish' button at the bottom of the page. • You will be taken to "Confirm Record Submission Page" page. The system displays a preview of Metadata Record Cataloging Form with all information as user it will appear to the user at the time of record submission. At the top of the page three buttons will appear mark with 'Go back and make more changes before saving', 'No. Cancel all changes' and 'Yes, save all changes '. 8. Click 'Yes, save all changes'.
Result	The modifications to the Cataloging Form will be saved in the system.
Things to look out for	At step 2 if you a) do not enter the required fields

	b) do not include one or more required fields of metadata structure the system will reload the page with all previously entered data, displays an error message specifying what went wrong. At step 8, if you click on “Go back and make more changes before saving”, you will be return to step 2 and may continue to working on Metadata Record Cataloging Form. At step 8 if you click on “No. Cancel all changes”, all your work for this Cataloging Form will be discarded, and you will be return to the View All Metadata Record Cataloging Forms page.

4.4.1 Add or Edit Metadata Field to a Metadata Record Cataloging Form	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	Add a new Metadata Field or edit an existing Field to a Metadata Record Cataloging Form.
Which page do I have to be in to access this functionality?	Edit Metadata Record Cataloging Form
Steps	1. Click on the “Add a field to the end of this page” button at the bottom of the Metadata Record Cataloging Form. 2. A new blank field will display at the bottom of the page. • The fields marked with a * (star) are required. 3. Select a Metadata Field first and enter a Prompt for this field. The prompt is the question that a Cataloger will see when they use this form. 4. Enter Brief and Extended help texts for the field. These are guidelines/information that you want to be available to a Cataloger entering value to this field. 5. Select an Input Type for this field. Note that the Input Type depends on the Metadata Field. Changing the Metadata Field changes the list of eligible Input Types for this Field. 6. Select a Method of display for this Field. This will determine whether this field is: a. Visible to Cataloger so that they can update the value b. Visible but not editable so that the input for this filed is fixed and visible to the Cataloger but may not be edited by her. If you use this option then you would have to provide the default value in the “Default” input box just below.

	c. Not visible and not editable so that it is fixed at the Default and not seen by Catalogers. 7. Select a Controlled Vocabulary for this Field. Again the list of eligible Controlled Vocabularies will depend on the Metadata Field. Some Metadata Fields such as Keyword will not have any associated Controlled Vocabulary so this list will be empty. For the Fields that have one or more Controlled Vocabularies associated with them you will be able to select one from the list. If you do so, Catalogers will be presented with the Terms of the Controlled vocabulary as the eligible inputs for this Field.
Result	The Field will temporarily added/edited to the Metadata Record Cataloging Form. You must now save this Form in order to make the addition/modification permanent.
Things to look out for	If you do not save the Cataloging Form, the addition/modification will not be saved in the system.

4.5 Enable Metadata Record Cataloging Form	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	Enable a Metadata Record Cataloging Form so that it may be used to by Catalogers to catalog Metadata Records.
Which page do I have to be in to access this functionality?	View All Metadata Record Cataloging Forms
Condition	Metadata Record Cataloging Form is disabled.
Steps	1. Click on the "Enable" link from under the Metadata Record Cataloging Form heading from View All Metadata Record Cataloging Forms page. • The system will prompt you for confirmation. 2. Click "OK" button to enable this Metadata Record Cataloging Form.
Result	The Metadata Record Cataloging Form will be available to users to catalog new Metadata Records. The system will display a message indicating that the Metadata Record Cataloging Form is enabled.

4.6 Disable Metadata Record Cataloging Form	
Which users have access to	Collection Administrator and Collection Manager

this page?	
What does this functionality allow me to do?	Discontinue the use of a particular Metadata Record Cataloging Form. The Form will not however be deleted from the system as there may be existing records that were uploaded using the Form.
Which page do I have to be in to access this functionality?	View All Metadata Record Cataloging Forms
Condition	Metadata Record Cataloging Form is enabled.
Steps	1. Click on the "disable" link from under the Metadata Record Cataloging Form heading from View All Metadata Record Cataloging Forms page. • The system will prompt you for confirmation. 2. Click "OK" button to disable this Metadata Record Cataloging Form.
Result	Metadata Record Cataloging Form will no longer available to users for cataloging new Metadata Records. The system will display a message indicating that the Metadata Record Cataloging Form was successfully disabled.

4.7 Delete Metadata Record Cataloging Form	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	Delete an existing Metadata Record Cataloging Form.
Which page do I have to be in to access this functionality?	View All Metadata Record Cataloging Forms
Condition	A Metadata Record Cataloging Form may not be deleted if there is a Metadata Record which was created using that process.
Steps	1. Click on the "Delete" link from under the Metadata Record Cataloging Form heading from View All Metadata Record Cataloging Forms page. • The system will prompt you for confirmation. 2. Click "OK" button to delete this Metadata Record Cataloging Form.
Result	Metadata Record Cataloging Form will be deleted from system.

5. Metadata Records Management

5.1 Catalog/Upload Metadata Record	
Which users have access to this page?	Collection Administrator, Collection Manager, Validator and Cataloger.
What does this functionality allow me to do?	Catalog a new Metadata Record for a Resource. You may either provide a link for your Resource or upload the Resource.
Which page do I have to be in to access this functionality?	User Home Page
Steps	1. Click the process (Metadata Record Cataloging Form) you want to use 2. The system will display the Metadata Record Cataloging Form. Fill the form. • The fields marked with a * (star) are required 3. At the bottom of the page click 'Save and Finish' button. • You will be taken to record confirmation page. • The system displays a preview of the Metadata Record with all the information you entered in the previous page. At the top of the page you will see four buttons: 'No - I want to cancel all my work on the record', 'No - let me go back and continue editing', 'Yes - Save my changes and take me back to the Submission Form to upload a similar record' and 'Yes - I am done, save all my changes'. 4. Click 'Yes - I am done, save all my changes'.
Result	The new Metadata Record will be added to the system and marked as 'Unvalidated'.
Things to look out for	1. At step 2, you do not enter the required fields the system will reload the page with all previously entered data, display an error message specifying what went wrong. The Metadata Record will not be added to the system at this point. 2. At step 4, if you click on "No - I want to cancel all my work on the record", all your work for the Metadata Record will be discarded, and you will be redirected to Catalog/Upload Metadata Record page. 3. At step 4, if you click on "No - let me go back and continue editing", you will be return to step 2 and may continue to working on Metadata Record Cataloging Form. 4. At step 4, if you click on 'Yes - Save my changes and take me back to the Submission Form to upload a similar record' the

	new Metadata Record will be saved to system and you will be redirected to step 2 and allowed to catalog a similar Metadata Record with the same Metadata Record Cataloging Form. 5. At step 4, if you click on 'Yes - I am done, save all my changes' the new Metadata Record will be saved to database and you will be taken back to Catalog/Upload Metadata Record page.

5.2 View All Metadata Records	
Which users have access to this page?	Collection Administrator, Collection Manager, Validator and Cataloger.
What does this functionality allow me to do?	View the list of all existing Metadata Records in the system.
Which page do I have to be in to access this functionality?	User Home Page
Steps	1. Click on the "Catalog" link from the menu bar or the "View existing Metadata Records" link in the User Home Page under "View Metadata Records" heading.
Result	1. The system displays the list of uploaded record in the system. 2. The top of the page also contain the links for view Metadata Record Modification History.

5.3 View Details of Metadata Record	
Which users have access to this page?	Collection Administrator, Collection Manager, Validator and Cataloger.
What does this functionality allow me to do?	View details of a previously uploaded Metadata Record.
Which page do I have to be in to access this functionality?	View All Metadata Records
Steps	1. Click on the Metadata Record's name from View All Metadata Records page.
Result	The system will display the details of the Metadata Record.

5.4 Edit Metadata Record	
Which users have access to this page?	Collection Administrator, Collection Manager.
What does this functionality allow me to do?	Edit the details of a previously uploaded Metadata Record.
Which page do I have to be in to access this functionality?	View All Metadata Records By Validation Stage
Steps	1. Click on the "Edit" link for a Metadata Record from the View All Metadata Records By Validation Stage page. • You will be redirect to Edit Metadata Record page. • A pre-populated Metadata Record Cataloging Form will be displayed. 2. Make necessary changes to the Metadata Record by updating the inputs in the Cataloging Form. 3. Click on the "Finish and save" button at the bottom of the page. • You will be taken to Metadata Record confirmation page. The system displays a preview of the Metadata Record with all updates you made in the previous page. • At the top of the page four buttons will appear mark with 'No - I want to cancel all my work on the record', 'No - let me go back and continue editing' and 'Yes - I am done, save all my changes'. 4. Click 'Yes - I am done, save all my changes'.
Result	Modifications to the Metadata Record will be saved in the system.
Things to look out for	1. At step 2, if you do not enter the required fields the system will reload the page with all previously entered data, display an error message specifying what went wrong. Information about the Metadata Record is not modified in the system at this point. 2. At step 4, if you click on "No - I want to cancel all my work on the record", all your work for this Metadata Record will be discarded, and you will be redirected to Upload/Catalog Metadata Record page. 3. At step 4, if you click on "No - let me go back and continue editing", you will be return to step 3 and may continue to working on Metadata Record.

5.5 View Record Modification History Report	
Which users have access to	Collection Administrator and Collection Manager.

this page?	
What does this functionality allow me to do?	See details about when and by whom each Metadata Record in the system was modified.
Which page do I have to be in to access this functionality?	User Home Page
Steps	1. Click on the “View Record History” link from the menu bar or the “View record modification history” link under “View Records” heading in the User Home Page.
Result	The system will display the history of all Metadata Record in the system. The details displayed includes Record Title, The name of the user who acted on the record, the action that was taken on the record and the time of the action, the stages the record was in before and after the action.

6. Validate Metadata Records

6.1 View All Metadata Records by Validation Stage	
Which users have access to this page?	Collection Administrator, Collection Manager and Validator.
What does this functionality allow me to do?	View all the existing Metadata Records according to their validation stage.
Which page do I have to be in to access this functionality?	User Home Page
Steps	1. Click on the "View all records by validation stage" link from the User Home Page under "Validate Records" heading. • You will be redirected to "View All By Stage" page.
Result	The system will display all existing Metadata Records in the system according to their validation stage. There are five validation stages: a) **Unassigned** – Metadata Records have not yet been assigned to Validators. b) **Assigned** – Metadata Records which have been assigned to Validators but not yet validated. c) **Validated** – Metadata Records which have been validated and are a part of the collection d) **Unvalidated Archive** – Metadata Records which have been archived from the collection before validation. e) **Validated Archive** – Metadata Records which have been archived from the collection after validation

6.2 Assign Un-validated Records	
Which users have access to this page?	Collection Administrator and Collection Manager.
What does this functionality allow me to do?	Assign un-validated Metadata Records to Validators.
Which page do I have to be in to access this functionality?	User Home Page
Steps	1. Click on the "Assign unvalidated records" link from the User

	Home Page under "Validate Records" heading. • You will be redirected to "View Unvalidated Metadata Records" page. • The system displays the records which have not yet been validated. Alongside each record, the system displays a dropdown list containing the names of all Validators in the system. 2. Select a Validator for a Metadata Record from the dropdown list. 3. Click "Assign" button.
Result	The Metadata Record will be assigned to the selected Validator and promoted to the "Assigned" stage. Now the assigned Validator can see this record in her "View Metadata Record Validations Assigned To You" page.

6.3 View Metadata Record Validations Assigned To You	
Which users have access to this page?	Validator
What does this functionality allow me to do?	View all the Metadata Records that have been assigned to you for validation.
Which page do I have to be in to access this functionality?	User Home Page
Steps	1. Click on the "View all validations assigned to you" link from the User Home Page under "Validate Records" heading. • You will be redirected to the "View Assigned Validations" page.
Result	1. The system will display the Metadata Records that have been assigned to you. 2. Alongside each record, the system displays a "Validate" link. See Validate Metadata Record below for record validation process.

6.4 Validate Metadata Record	
Which users have access to this page?	Validator.
What does this functionality allow me to do?	Validate the Metadata of a Record and make it a part of the collection.
Which page do I	View Metadata Record Validations Assigned To You

have to be in to access this functionality?	
Steps	1. Click on the "Validate" link of a record from View Metadata Record Validations Assigned To You page. • You will be redirected to the Validate Metadata Record page. • A pre-populated Metadata Record Cataloging Form will be displayed. 2. Update necessary fields for this Metadata Record. 3. Click on the "Validate the record" button at the bottom of this page.. • You will be taken to record confirmation page. The system displays a preview of user input with all information as user entered in the previous page. At the top of the page you will see three buttons: 'No - I want to cancel all my work on the record', 'No - let me go back and continue editing' and 'Yes - I am done, save all my changes'. 4. Click 'Yes - I am done, save all my changes'.
Result	The Metadata Record will be marked as "Validated" in the system and will be added to the collection. This metadata Record will now be available for Search and Browse.
Things to look out for	1. At step 2, if you do not enter the required fields the system will reload the page with all previously entered data, displays an error message specifying what went wrong. The Metadata Record modifications are not saved in the system at this point. 2. At Step 4, if you click on "Place the record in the archive" button, the Metadata Record will be archived and will not be added to the collection, it will not show up during search or browse. 3. At step 4, if you click on "No - I want to cancel all my work on the record", all your work for this Record will be discarded, and you will be redirected to View Metadata Record Validations Assigned To You page. 4. At step 4, if you click on "No - let me go back and continue editing", you will be return to step 2 and may continue to working on Metadata Record. 5. At step 4, if you click on 'Yes - I am done, save all my changes'. You will be taken back to View Metadata Record Validations Assigned To You page.

6.5 De-Accession Metadata Record	
Which users have access to this page?	Collection Administrator and Collection Manager.
What does this	Remove a Metadata Record from the collection. While the Metadata

functionality allow me to do?	for the Resource remains in the system, it is no longer considered part of the collection.
Which page do I have to be in to access this functionality?	View All Metadata Records By Validation Stage
Steps	1. Click on the "DeAccession" link of a record from View All Metadata Records By Validation Stage page. • You will be prompted to confirm that you really want to de-accession this record. Click "ok".
Result	The Metadata Record will be de-accessioned from collection and marked as "Unvalidated Archive".

7. Author Directory Management

7.1 View All Authors	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	View a list of all existing authors to add new Authors to the system or view/update details of existing Authors.
Which page do I have to be in to access this functionality?	User Home Page.
Steps	1. Click on the "View the authors directory" link from User Home Page or the "Manage Authors" link from the menu bar.
Result	System displays a list of all existing Authors and associated links to add new or edit/delete existing Authors.

7.2 Add Author	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	Allow users to add a new Author to the system.
Which page do I have to be in to access this functionality?	View All Authors
Condition	None
Steps	1. Click on the "Add Author" link from View All Authors page. • You will be redirected to the "Add a new Author" page 2. Fill in the form. • The fields marked with a * (star) are required. • Email field must be a valid email address. 3. Click "Save" button.
Result	The new Author is added to the system and will be available for selection in the Author dropdown in Metadata Record Cataloging Forms. You will be taken back to View All Authors Page.
Things to look	At step 2 if you do not enter one of the required fields or a valid email

out for	address, system will reload the page and displays an error message indication what went wrong.

7.3 Edit Author	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	Edit details of an existing Author.
Which page do I have to be in to access this functionality?	View All Authors
Steps	1. Click on the “Edit” link from the list in View All Authors page. • You will be redirected to the “Edit Author” page. 2. The system will display the Author detail form pre-populated with information already saved in database. Edit the form: • The fields marked with a * (star) are required. • Email field must be a valid email address. 3. Click “Save” button.
Result	The modified details will be saved in the system. You will be taken back to View All Authors Page.
Things to look out for	At step 2 if you do not enter one of the required fields or a valid email address, the system will reload the page and displays an error message indication what went wrong.

7.4 Delete Author	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	Delete an existing Author from the system.
Which page do I have to be in to access this functionality?	View All Authors
Condition	None
Steps	1. Click on the “Delete” link from the list in View All Authors

	page.
Result	The Author will be deleted from the system. You will be taken back to View All Authors Page.

7.5 Use Author in Metadata Record Cataloging Form	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	If there is a 'Resource Author' input type in the Metadata Record Cataloging Form you are using, you can select an Author from system. This will populate of the fields of 'Resource author' input type will be automatically populated with the details of the existing Author.
Which page do I have to be in to access this functionality?	Upload/Catalog Metadata Record
Condition	There should be one or more authors in Author Directory and Record Submission From must have at least one 'Resource author' input type.
Steps	1. Select an author from the 'Select Author' dropdown list.
Result	The rest of the field of 'Select Author' input type will be populated from database. The Author Details are not yet saved in the system for the Metadata Record. You must save the Record in order to associate the Author permanently to the record in the System.

8. Search and Browse

8.1 Basic Search	
Which users have access to this page?	Collection Administrator, Collection Manager, Validator, Cataloger, Browser
What does this functionality allow me to do?	Basic search allows the user to enter keywords into a search box. The keywords are queried against the following fields in the metadata of the record: Title, General Description, and Keyword. The result returns a list of records in the system which contain the keywords which the user has entered
Which page do I have to be in to access this functionality?	Basic Search Page
Condition	The search index has been updated and contains records.
Steps	1. Enter a keyword into the search box and click the Search button
Result	The result is a list of records which contain this keyword(s) in the following Metadata Fields: Title, General Description, and Keyword.
Things to look out for	There are no matching records and no results are returned.

8.2 Advanced Search	
Which users have access to this page?	Collection Administrator, Collection Manager, Validator, Cataloger, Browser
What does this functionality allow me to do?	The advanced search allows the user to query records by several fields. The first three fields are controlled vocabulary dropdowns; they include the following lists: BEN Subject/Discipline Taxonomy, BEN Pedagogical Use Taxonomy, and Resource Type. The fourth field is a keyword search like basic search which also queries the following Title, General Description, and Keyword. All the dropdown and keyword search fields are connected by AND clause.
Which page do I have to be in to access this functionality?	Advanced Search Page
Condition	The search index has been updated and contains records.
Steps	Entering information in each field is optional. The more information is entered the more filtered your search result will be. Select terms from the dropdown menus and/or add a keyword search in the

	"Search string" box; Click Search.
Result	The result is a list of records which contain the information that was entered.
Things to look out for	There are no matching records and no results are returned.

8.3 Browse	
Which users have access to this page?	Collection Administrator, Collection Manager, Validator, Cataloger, Browser
What does this functionality allow me to do?	The browse interface displays the BEN Subject/Discipline Taxonomy controlled vocabulary list. For each term in the list, a number is displayed in parenthesis indicating the number of resources which have been categorized under that term. If there are any records categorized under a term, a link is displayed allowing a user to view all the records associated with that term.
Which page do I have to be in to access this functionality?	Browse Page
Condition	Records have been validated into the system and categorized using the BEN Subject/Discipline Taxonomy controlled vocabulary list.
Steps	1. Click a term in the BEN Subject/Discipline Taxonomy controlled vocabulary list to view a list of records which are categorized under that term.
Result	The page will display a list of records which are categorized under that term the user clicked.
Things to look out for	No records have been categorized under a specific term so a link does not exist.

8.4 Update Search Index	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	For the basic and advanced search functionality to operate properly the search index update function needs to be run either on a schedule or anytime new records is validated into the system.
Which page do I have to be in to access this functionality?	My Home Page
Condition	Record(s) have been validated into the system.

Steps	1. Click “Update Search Index” from the “My Home” page.
Result	The page displays “The search engine index has been updated successfully.”
Things to look out for	If the search index code is not customized properly some fields may omitted in the update.

Peer Review

9. Peer Review Forms Management

9.1 View All Peer Review Forms	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	View the list of all existing Peer Review Forms in order to Add, Edit or Preview these forms.
Which page do I have to be in to access this functionality?	Peer Review Page
Steps	1. Click on the "View Review Forms" link under the heading "Manage Review Forms" from Peer Review Page.
Result	The system displays the list of all existing peer Review Forms, including name, description, and assigned review states.

9.2 Add Peer Review Form	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	Create a new Review Form to be used by peer reviewers or single reviewers at various stages in a peer review workflow. After you save this form you have to associate it with one of the review steps in a peer review workflow.
Which page do I have to be in to access this functionality?	Peer Review Page
Steps	1. Click on the "Add Review Form" link from Peer Review Page. • You will be redirected to the "Add Form" page 2. Fill in the identifying information such as the title, description and help text for the form of the form: • The fields marked with a * (star) are required. 3. Click "Save" button. • The system will take you to a screen with four sections. The top section allows you to edit the identifying information for the form which you have

	just added. The middle section allows you to add a new question to the form. The bottom left section allows you to edit or delete existing questions from the form. And the bottom right section displays a preview of the form as it will appear at the time of review. The bottom section allows you to "Save" or "Cancel" your work for the form. 4. Add, modify or delete questions from a Review Form. See below for details on how to Add Question To Peer Review Form and Edit Question From a Peer Review Form. 5. After you are done with adding questions, Click "Save". • The system displays a preview of the Review Form, as it will appear to the reviewer. At the bottom of the screen are buttons marked "Finish and save", "Go back", and "Cancel". 6. Click "Finish and save".
Result	The new Peer Review Form will be created in the system. You will be redirected to the View All Peer Review Forms page.
Things to look out for	1. At step 2, if you do not enter the required fields the system will reload the page with all previously entered data, display an error message specifying what went wrong. The form is not yet saved in the system. 2. At step 6, if you click on "Go back", you will be return to step 2 and may continue working on the Review Form. 3. At step 6, if you click on "Cancel", all your work will be discarded, and you will be redirected to View All Peer Review Forms page.

9.2.1 Add Question to Peer Review Form	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	Add a new question at the end of a Review Form.
Which page do I have to be in to access this functionality?	Add Peer Review Form
Condition	You are at step 4 of Add Peer Review Form.
Steps	1. The system displays the following inputs: • **Prompt**: Provide the prompt of Review Form. This is required field. • **Handle**: Must be alphanumeric and unique among all

	other review questions for this form. This is required field. • **Brief Help Text**: This is optional field. You may enter a brief description for this form question. • **Extended Help Text**: Optional extended help text. When users come to answer this question, they will be provided with a link to see the extended help for this question and redirected to a new page containing the text you enter here when they click on this "extended help" link. • **Data Type**: Select a data type for this question. At the time of review, form field value will be validated against data type. This is required field. • **Input Type**: Select an input type and it is required field. • **Required**: Indicate if this field is required in all peer Review Forms. If you select "Yes" then it makes it compulsory for the reviewers to answer this question when they do their review. • **Multiplicity**: Indicate whether peer reviewers are allowed to enter multiple answers for this question. Results in an "Add Another" option being presented to the User in the when they come to use this Peer Review Form. 2. Enter the inputs. 3. Click "Submit".
Result	The system verify the following: 1. A prompt is provided 2. A handle is provided and contains only alphanumeric characters, and is unique among all other questions for this form 3. The input type is compatible with the data type 4. The options are provided and are valid Controlled Vocabularies, if the input type is drop-down list, checkbox, or radio button. You will be returned to the Review Form editing section. In the bottom right-hand corner, the preview of the Review Form is updated. At this time the question is not yet saved in the system. You must save the Review Form to finalize the addition of this question to the Form.
Things to look out for	At step 2, if the system finds an error in your input, you will be notified that there is a mistake in the form, and returned to Step 2.

9.2.2 Edit Question From Peer Review Form	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	Modify an existing question form a peer Review Form.
Which page do I have to be in to access this functionality?	Add Peer Review Form
Condition	You will be at step 4 of Add Peer Review Form.
Steps	1. Click on the edit link of a question from bottom left section. • The system displays the same inputs as those described in Step 1 of Add Question To Peer Review Form, as well as the buttons "Submit", "Disable", "Move up", and "Move down". 2. Fill in the form. 3. Click "Submit", "Move up", or "Move down". • The system verifies that the input is valid and updates the form to include the new inputs. If "Move up" was clicked, the question is switched with the preceding question in the form. If "Move down" was clicked, the question is switched with the succeeding question in the form.
Result	1. You will be returned to the Review Form editing section. In the bottom right-hand corner, the preview of the Review Form is updated. 2. At this time the modifications to the question are not yet saved in the system. You must save the Review Form to finalize the modifications of this question to the Form.
Things to look out for	1. In Step 3, if you click the "disable" link, the question is made inactive for the form. Reviewers will no longer see this question when performing reviews. The preview of the form will be updated. 2. In Step 3, if the system finds an error in your input, you will be notified that there is a mistake in the form. The preview of the form is not updated, you will be returned to Step 2.

9.3 Edit Peer Review Form	
Which users have access to this page?	Collection Administrator and Collection Manager

What does this functionality allow me to do?	Modify summary and questions of a Peer Review Form
Which page do I have to be in to access this functionality?	View All Peer Review Forms
Condition	There must be at least one Review Form in the system.
Steps	1. Click on edit link of a Review Form in the View All Peer Review Forms page. • You will be redirected to the "Edit Form" page • The system displays a screen with four sections. The top section has inputs for specifying the title, description and help text for the form. The middle section has inputs for adding a new question to the form. The bottom left section has inputs for editing or deleting each of the questions on the form. And the bottom right section displays a preview of the form as it will appear at the time of review. The bottom section contains buttons "Save" and "Cancel". 2. Top section display the pre-populated form with form summary information already recorded. Edit the form. • The fields marked with a * (star) are required. • A form question can be edited or deleted from edit/delete link from bottom left section. • Editing a form question described in Edit Question From Peer Review Form. 3. Clicks "Save". • The system displays a preview of the Review Form, as it will appear to the reviewer. At the bottom of the screen are buttons marked "Finish and save", "Go back", and "Cancel". 4. Click "Finish and save"
Result	The Review Form modifications are saved in the system. You will be redirected to View All Peer Review Forms page.
Things to look out for	1. At step 2, you do not enter the required fields the system will reload the page with all previously entered data, displays an error message specifying what went wrong. Information is not modified to the system. 2. At step 4, if you click on "Go back", you will be return to step 2 and may continue to working on Review Form. 3. At step 4, if you click on "Cancel" your work for this form will be discarded, and you will be redirected to View All Peer Review Forms page.

9.4 Preview Peer Review Form	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	View the Peer Review Form as user view this form at the time Metadata Record review.
Which page do I have to be in to access this functionality?	View All Peer Review Forms
Condition	There must be at least one Review Form in the system.
Steps	1. Click on the "Preview" link of a peer Review Form from View All Peer Review Forms page.
Result	The system will display the preview of peer Review Form.

10. Peer Review Workflow Management

The peer review workflow is the process by which all Metadata Records are peer reviewed. It is a chronological series of steps specified by the administrator. The first step is always the submission of the Metadata Record. Subsequent steps are the combinations of the following steps.

a) **Assignment Step:** In this step, one user orders one or more other users to carry out some other step.
b) **Single Person Review Step:** A single person review is a review conducted by exactly one person, and may result in one of the following decisions:
    - Accept - The Metadata Record is accessioned into the collection, and may not be removed until a user de-accessions it through the Quality Control and Validation module. No further review may be conducted.
    - Reject - The Metadata Record is rejected from the collection. No further review may be conducted.
    - Feedback – Feedback is requested from the resource contact through email. When the resource contact answers the request from feedback, the single-person review step is repeated.
    - Redirect – The reviewer indicates that the Metadata Record should undergo with a preceding assignment step of this workflow.
c) **Parallel Review Step:** Parallel reviews are a set of reviews conducted by one or more person. While the resource is undergoing parallel review, it may not progress until a specified minimum number of reviews are performed.

The collection administrator and manager are free to create and modify the workflow in any way, subject to these restrictions:
- The first step (after the default Submitted Step) must be an Assignment Step.
- An Assignment Step may be followed by another Assignment Step, a Single Review Step or a Parallel Review Step.
- All Single and Parallel Review steps must be preceded by an Assignment step.
- The final step of the workflow has to be a Single Review Step.

10.1 View All Peer Review Workflows	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	View summary of all existing Peer Review Workflows in the system.
Which page do I have to be in to	Peer Review Page

access this functionality?	
Steps	1. Click on the "View peer review workflow list" link under the heading "Manage Workflows" from Peer Review Page.
Result	The system displays the list of all workflows in the system including workflow name and available Metadata Record Cataloging Forms. From here you edit an existing workflow or view it by clicking associated link in action column.

10.2 Create Peer Review Workflow	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	Create a new workflow in the system.
Which page do I have to be in to access this functionality?	Peer Review Page.
Steps	1. Click on the "Create a new peer review workflow" link under the heading "Manage Workflows" from Peer Review Page. • You will be redirected to workflow details form. The system displays a screen which displays the first step of the current workflow, which is the Submitted step. At the top of the screen there will be a summary of the workflow. • After the summary, the system displays a form to specify workflow name and a list of checkboxes, one for each Metadata Record Cataloging Form. By checking of a Metadata Record Cataloging Form, the administrator specifies that Metadata Records from that Metadata Record Cataloging Form should be subject to the peer review workflow. • To view or change the details for an existing, you may click on that step in the summary at the top of the screen. • For all steps in the process, at the bottom of the screen the system will display some of the following buttons, subject to the workflow design restrictions described above: o Add an assignment step before this step o Add an assignment step after this step o Add a single-person review step before this step o Add a single-person review step after this step o Add a parallel review step before this step o Add a parallel review step after this step

	o Delete the last step o Save Workflow o Cancel 2. Add steps to the workflow or delete them from the Workflow (see below for details). 3. Click “Save Workflow”. • The system displays the full details of the workflow, and prompts the user with buttons to “Finish and save”, “Go back” and “Cancel”. 4. Click “Finish and save”.
Result	A new version of the workflow is created and saved in the system. Once you create a workflow and associate it with a Metadata Record Cataloging Form, any Metadata Record cataloged through the associated Metadata Record Cataloging Form will initially be subject to Peer Review before it is ready to be validated through the Quality Control and Validation module.
Things to look out for	1. In Step 3, the workflow is found to have violated one or more restrictions. The “Finish and save” button will be disabled, and displays the reason why the workflow is invalid. The user must go back and fix the problem, or cancel the changes. 2. In Step 4 if you click “Go back”, the system returns to Step 2, and you can continue to work on the workflow. 3. In Step 4, if you click “Cancel”, the system will not save the workflow, and your work will discarded.

10.2.1 Add Assignment Step To Peer Review Workflow	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	Add an assignment step to the workflow. This step facilitates you to manage the workload of Peer Reviewers by distributing a Metadata Record among multiple reviewers of a Peer Review group.
Which page do I have to be in to access this functionality?	Create Peer Review Workflow
Condition	You are at Step 2 of Create Peer Review Workflow.
Steps	1. Click on the “Add an assignment step before this step” or “Add an assignment step after this step” button. 2. The system will display the form with following inputs. Fill the form. • **Assigning step name:** Provide a name for the step. This step will be represented by this name throughout the system.

	• **Assigning Group:** The Assigning Group filed allows you to select the user groups eligible for assigning the tasks for the next step in the workflow when a Record reaches this assignment step. • **Working Group:** The Working Group field allows you to select the user groups eligible perform in the next step of the workflow. • **Minimum number of assignments:** Specify the minimum number of assignment that must be made in this step. If the next step is a Parallel Review Step then the minimum value you set here specifies the number of Peer Reviews required progress the Metadata Record further along the workflow. • **Maximum number of assignments:** Maximum number of assignment may be made. This is applicable only if the next step is Parallel Review Step. • **Time to complete step:** Set the number of days the Assigning Group will have to assign tasks for the next step to the Working Group. • At the bottom of the page the system displays "Add Step" or "Cancel" button. 3. Click on the "Add Step" Button.
Result	The Assignment Step will be added to the workflow and you will be redirected to Create Peer Review Workflow page. At the top of this page the workflow summary will be updated and you will see the step appear in your workflow. At this point the step is not saved in the system. You must save the workflow to finalize the addition of the step to the workflow.
Things to look out for	1. In Step 2, in your inputs are not valid, you will be returned to Step 2, and the errors will be reported. The following are the conditions are errors: • No assigning group is chosen. • No working group is chosen. • Minimum number of assignments input should be numeric. • Maximum number of assignments input should be numeric. • The maximum number of assignments is less than the minimum number of assignments. • Time to complete step input should be numeric. • Time to complete should not be 0 day. 2. In Step 3, if you click "Cancel", you will be redirected to Create Peer Review Workflow page, and no changes are made to the workflow.

10.2.2 Add Single Review Step To Peer Review Workflow	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	Add a single review step to the workflow. Single reviews allow a single person to make such as the Collection Manager to make the final decision on whether or not to progress the Metadata Record further into the workflow or make it available for Validators to validate and make this Record a part of the collection.
Which page do I have to be in to access this functionality?	Create Peer Review Workflow
Condition	You are at Step 2 of Create Peer Review Workflow.
Steps	1. Click on the "Add a Single review step before this step" or "Add a Single review step after this step" button. You will be taken to the Single Review Step form. 2. The system will display the form with following inputs. Fill the form. • **Name:** Provide a name for the step. This step will be represented by this name throughout the system. • **Form:** Select the form you want the reviewers to see when they come to perform the review at this step. If you do not have the required form available please create it first (see Add Peer Review Form for details on form creation). • **Redirecting steps:** Specify redirect options for the Single Reviewers. This will allow reviewers at this step to redirect the review to one of the previous assignment steps you check here. • **Email template:** Create a template for the email the reviewers at this stage will be able to use to send emails to the author of the Resource if they have any questions. • **Time to complete step:** Set the time limit in day to complete this step. • At the bottom of the page the system displays "Add Step" or "Cancel" button. 3. Click on the "Add Step" Button.
Result	The Single Review Step will be added to the workflow and you will be redirected to Create Peer Review Workflow page. At the top of this page the workflow summary will update and you will see the step appear in your workflow. At this point the step is not saved in the system. You must save the workflow to finalize the addition of the step to the workflow.
Things to look	1. In Step 2, if your inputs are not valid, you will be returned to Step

out for	2, and the system will report the errors. The following conditions are errors: • No form has been selected. • Time to complete step input should be numeric. • Time to complete should not be 0 day. 2. In Step 3, if you click "Cancel", you will be redirected to Create Peer Review Workflow page, and no changes will be made to the workflow.

10.2.3 Add Parallel Review Step To Peer Review Workflow	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	Add a Parallel Review Step to the workflow. At this step you specify details of the Peer Reviews that will be performed in parallel by Peer Reviewers.
Which page do I have to be in to access this functionality?	Create Peer Review Workflow
Condition	You are in Step 3 of Create Peer Review Workflow.
Steps	1. Click on the "Add a Parallel review step before this step" or "Add a Parallel review step after this step", you will be taken to the Add/Edit Parallel Review Step form. 2. The system will display the form with following inputs. Fill the form. • **Name:** Provide a name for the step. This step will be represented by this name throughout the system. • **Form:** Select the form you want the reviewers to see when they come to perform the review at this step. If you do not have the required form available please create it first (see Add Peer Review Form for details on form creation). • **Assessment options:** Set the assessment options for the reviewers. Each line should have exactly one option and should only contain alphanumeric character and dots. • **Time to complete step:** Set the time limit in day to complete this step. • At the bottom of the page the system displays "Add Step" or "Cancel" button. 3. Click on "Add Step" Button.
Result	The Parallel Review Step is added to the workflow and you will be redirected to Create Peer Review Workflow page. At the top of this page the workflow summary will update and user will see the step appear in your workflow.

	At this point the step is not saved in the system. You must save the workflow to finalize the addition of the step to the workflow.
Things to look out for	1. In Step 2, if your inputs are not valid, you will be returned to Step 2, and the errors will be reported. The following conditions are errors: • No form has been selected. • No assessment options are specified. • Time to complete step input should be numeric. • Time to complete should not be 0 day. 2. In Step 3, if you click "Cancel", you will be redirected to Create Peer Review Workflow page. No changes will be made to the workflow.

10.3 Edit Peer Review Workflow	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	Modify an existing peer review. If you edit a workflow, Records that were already being reviewed using the old workflow will continue to use the old workflow. Therefore, when you edit a workflow a copy of the workflow will be created and new Metadata Records will use this new workflow.
Which page do I have to be in to access this functionality?	View All Peer Review Workflows.
Condition	System must have at least one workflow to edit it.
Steps	1. Click on the "Edit workflow" link of an existing workflow from View All Peer Review Workflows page. • You will be redirected to the workflow details form. The system displays a screen which displays the first step of the current workflow, which is the Submitted step. At the top of the screen is a summary of the existing workflow. 2. After the summary, the system displays a pre-populated form with workflow name and a list of checkboxes, one for each Metadata Record Cataloging Form. By checking the checkbox of a Metadata Record Cataloging Form, you will be able to specify that Metadata Records cataloged using that Metadata Record Cataloging Form are subjected to the Peer Review using this workflow. 3. To view or change the details for another step, Click on that step in the summary at the top of the screen. 4. For all steps in the process, the bottom of the screen will display some of the following buttons, subject to the workflow design

	restrictions described above: a. Add an assignment step before this step b. Add an assignment step after this step c. Add a single-person review step before this step d. Add a single-person review step after this step e. Add a parallel review step before this step f. Add a parallel review step after this step g. Delete the last step h. Save Workflow i. Cancel 5. Add steps to the workflow or delete them from the workflow as described above. 6. Click "Save Workflow". • The system displays the full details of the workflow, and prompts the user with buttons to "Finish and save", "Go back" and "Cancel". 7. Click "Finish and save".
Result	A new version of the workflow will be created and saved in the system. Once you create a workflow and associate it with a Metadata Record Cataloging Form, any Record user upload through the Metadata Record Cataloging Form will initially be subject to Peer Review before it is read to be validated through the Quality Control and Validation module.
Things to look out for	1. In Step 7, the workflow is found to have violated one or more restrictions. The "Finish and save" button will be disabled, and displays the reason why the workflow is invalid. You must go back and fix the problem, or cancel the changes. 2. In Step 7 if you click "Go back", the system you return you to Step 2, and you may continue editing the workflow. 3. In Step 7, if you click "Cancel", the system will not save the workflow.

10.4 Preview Peer Review Workflow	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	Preview the peer review workflow and see how different steps in the workflow are structured.
Which page do I have to be in to access this functionality?	View All Peer Review Workflows.
Condition	System must have at least one existing workflow.

Steps	1. Click on the "View workflow" link of an existing workflow from View All Peer Review Workflows page.
Result	The system will display the workflow details. It also displays the details of all steps.

11. Perform Peer Review

11.1 View Reviews Awaiting Assignment	
Which users have access to this page?	All users who are eligible to perform assignments as indicated in a peer review workflow.
What does this functionality allow me to do?	View a list of Metadata Records that are waiting to be assigned to Reviewers.
Which page do I have to be in to access this functionality?	Peer Review Page
Condition	To access this module you must be in a user group that was selected as assigning group for a peer review workflow.
Steps	1. Click on the "View reviews awaiting assignment" link under the heading "Perform Reviews" from Peer Review Page.
Result	You will be redirected to the Reviews Awaiting Assignment page. The system will display a list of Metadata Records which are awaiting assignments. For each Metadata Record, the following are displayed: • The record title. • Current step name of workflow • Minimum number of assignment must be made to complete this assignment step for this record. In parentheses here also shows number of user already assigned. • Maximum number of assignment allowed for this Metadata Record. • A drop-down list displaying all the eligible reviewers, and their current pending workload in parentheses. The list includes "no assignment" if there is no workload for this user. • Links to add more than one user or remove added users.

11.2 Assign Reviews	
Which users have access to this page?	All users who are eligible to assign reviews as defined in the workflow.
What does this functionality allow me to do?	Assign Metadata Records to eligible reviewers for review.
Which page do I	View Reviews Awaiting Assignment

have to be in to access this functionality?	
Condition	To access this module you must belong to a user group that was selected as the assigning group for a peer review workflow.
Steps	1. Select an eligible reviewer from the dropdown list. • If you want to assign more than one reviewer click on "Add another reviewer" from action column. • Remove selected reviewer by clicking on "Remove all" link. 2. Click on "Assign Reviews" button.
Result	The Metadata Record will be assigned to selected reviewers for review. These reviewers will now be able to see this review in their "View pending reviews" page.

11.3 View Assigned Reviews	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	View all Metadata Records that have been assigned for review. You will be able to re-assign reviews from this page.
Which page do I have to be in to access this functionality?	Peer Review Page
Steps	1. Click on the "View assigned reviews" link under the heading "Perform Review" from Peer Review page.
Result	You will be redirected to the View Assigned Reviews page. The system displays a list of Metadata Records which have been assigned to reviewers for review. For each Metadata Record, the following items are displayed: • The Metadata Record title. • Name of the reviewer. • A drop-down list containing all the eligible reviewers for this Metadata Record and by default the dropdown list is selected with current assigned reviewer. • A "change" button at the bottom of the each dropdown list to allow you to change the reviewer.

11.4 Reassign Reviews	
Which users have access to this page?	Collection Administrator and Collection Manager
What does this functionality allow me to do?	Change assigned reviewers.
Which page do I have to be in to access this functionality?	View Assigned Reviews
Condition	Some reviews were already assigned through Assign Reviews.
Steps	1. Select a reviewer from dropdown list. 2. Click "Change" button at below of dropdown list.
Result	Reviewer will be changed for the associated Metadata Record.

11.5 View Pending Reviews	
Which users have access to this page?	All users who were assigned to perform review.
What does this functionality allow me to do?	View list of reviews that have been assigned to you.
Which page do I have to be in to access this functionality?	Peer Review Page.
Steps	1. Click on the "View pending reviews" link under the heading "Perform Review" from Peer Review page.
Result	For each reviews, the following are displayed: • The Metadata Record title. • Name of the other reviewers assigned for this Metadata Record. • The current status of the review. • A link to complete the review. • A link to view the record's review history (this link is only visible for collection administrator). • A link to view the complete Metadata Record.

11.6 Perform Parallel Review	
Which users have access to this page?	All users who were assigned to perform parallel review.
What does this functionality allow me to do?	Perform peer review on a Metadata Record by completing the Peer Review form. There will be other reviewers performing the same review on this Metadata Record. Once the specified number or peer reviews have been completed the Metadata Record advances to the next step in the workflow.
Which page do I have to be in to access this functionality?	View Pending Review
Steps	1. Click on the "Complete the review" link from View Pending Review page. 2. You will be redirected to the perform reviews page. The system displays a screen with four sections. • The top section displays basic details of the record, including its title, summary, URL and name of the step in the workflow process. • The second section includes a link to view the complete Metadata Record, to edit the record, to view the review history for the record. • The third section includes the Review Form for this record, a dropdown list for review decision and a comments field. Field mark with a star (*) is required. • At the bottom of the screen are buttons for "Complete review", "Save but do not complete", and "Cancel". Complete this form with review decision and comments. 3. Click on "Complete review" or "Save but do not complete". • The system verifies that the Review Form was correctly completed, and that an appropriate review decision was made. • The system displays a preview of the Review Form, the review decision, and the overall comments. At the bottom of the screen are buttons for "Go back", "Cancel all my work", and "Confirm". 4. Click "Confirm".
Result	The review is saved to the database and the system returns you to the View Pending Reviews screen. At Step 2 if your click on "Complete Review", the review will be marked as "Complete". The Metadata Record may advance to the next step of the workflow subject to completion of minimum number of reviews performed by other peer reviewers.

	At Step 2 if you click on "Save but do not complete", the review will be marked as "inprogress". The Metadata Record does not advance to the next step until you come back and complete the review.
Things to look out for	1. In Step 2, if you click "Cancel", all your work for this review will be discarded, and you will be returned to the View Pending Reviews screen. 2. In Step 3, if your inputs are not verified as valid, the system will return you to Step 2, and indicate the errors. 3. In Step 4, if you click "Go back", you will be returned to Step 3 and allowed to continue working. Your review has not yet been saved to the database. 4. In Step 4, if you click "Cancel all my work", all your work for this review will be discarded, and you will be returned to the View Pending Reviews screen.

11.7 Perform Single Review	
Which users have access to this page?	All users who were assigned to perform a single person review.
What does this functionality allow me to do?	Perform a single person review on the Metadata Record. A single person review normally comes after peer reviews are made by peer reviewers in order to aggregate the peer review results. When the review is complete, the review advances to the next step in the workflow.
Which page do I have to be in to access this functionality?	View Pending Review
Steps	1. Click on "Complete the review" link from View Pending Review page. 2. You will be redirected to the perform reviews page. The system displays a screen with four sections. • The top section displays basic details of the record, including its title, summary, URL and name of the step in the workflow process. • The second section includes a link to view the complete Metadata Record, to edit the record, to view the review history for the record. • The third section includes the Review Form for this Metadata Record, a dropdown list for review decision and a comments field. Field mark with a star (*) is required. • At the bottom of the screen are buttons for "Complete review", "Save but do not complete", and "Cancel". Complete the Review Form with review decision and comments.

	And selects “Complete review” or “Save but do not complete”. • The system verifies that the Review Form was correctly completed, and that an appropriate review decision was issued. • The system displays a preview of the Review Form, the review decision, and the overall comments. At the bottom of the screen are buttons for “Go back”, “Cancel all my work”, and “Confirm”. 3. Clicks “Confirm”.
Result	Your review will be saved and you will be returned to the View Pending Reviews screen. At Step 2 if you click on “Complete Review”, the review will be marked as “Complete”. The Metadata Record will advance to the next step of the workflow subject to completion of minimum number of reviews. It will cease to appear in the list of your pending reviews. At Step 3 if you click on “Save but do not complete”, review marked as “inprogress”. The Metadata Record does not advance to the next step. You will have to return to complete the review later.
Things to look out for	1. In Step 2, if you click “Cancel”, all your work for this review will be discarded, and you will be returned to the View Pending Reviews screen. 2. In Step 2, if your input is not verified as valid. The system will return you to Step 3, and indicates the errors. 3. In Step 3, if you click “Go back you will be returned to Step 3 and allowed to continue working on your review. Your review is not yet saved at this stage. 4. In Step 3, if you click “Cancel all my work”, all your work for this review will be discarded, and you will be returned to the View Pending Reviews screen.

11.7.1 View Review History	
Which users have access to this page?	All users who were assigned to perform single person or parallel review.
What does this functionality allow me to do?	View the history of the actions taken on a Metadata Record.
Which page do I have to be in to access this functionality?	Perform Single Review , Perform Parallel Review.

Steps	1. Click on "View review history for the record" link from Perform Single Review or Perform Parallel Review page.
Result	1. The system display list of actions taken on Metadata Record through the workflow process, the name of the user who took the action and the time the action was taken. 2. For reach review performed on the Metadata Record, the system displays a link to the Review Form.

11.7.2 View Reviews Completed By Individual Reviewers	
Which users have access to this page?	All users who are assigned to perform single person or parallel review.
What does this functionality allow me to do?	Allows users to see the reviews performed by peer reviewers in the earlier stages of the workflow.
Which page do I have to be in to access this functionality?	View Review History.
Steps	1. Click on the "View review history" of a Metadata Record from View Review History page.
Result	The system displays the Review Form as completed by the reviewer, including the review decision and the comments made on the Metadata Record overall.

12. Monitor Peer Review Progress

12.1 View Summary Statistics	
Which users have access to this page?	Collection Administrator, Collection Manager
What does this functionality allow me to do?	Get an overview of all ongoing peer review activities in the system
Which page do I have to be in to access this functionality?	Peer Review Page
Steps	1. Click on the “View summary statistics” link under the “Monitor Review Progress” heading in Peer Review Page.
Result	The system displays the following statistics • The number of Metadata Records submitted in the system. • The number of Metadata Records accessioned into the collection. • The number of Metadata Records rejected from the collection. • The number of Metadata Records currently under peer review, grouped by workflow step. • The number of reviewers active in the system, for each group of users eligible to perform reviews or assignments. • The total number of assignments, parallel reviews, and single-person reviews made in the system.

12.2 Monitor User Workload	
Which users have access to this page?	Collection Administrator, Collection Manager
What does this functionality allow me to do?	Monitor workload of all users working at various stages of the peer review workflow.
Which page do I have to be in to access this functionality?	Peer Review Page
Steps	1. Click on “Monitor user workload” link under the “Monitor Review Progress” heading in Peer Review Page.
Result	The system will display a list of reviewers in the system. For each

	user, the system displays: • User group name. • The number of reviews assigned to the user which are not yet completed (the current workload). • The number of reviews assigned to the user which are in progress. • The average time to complete a review (in day). • The total number of reviews assigned. • The total number of reviews completed

12.3 View Summary of Peer Review Progress	
Which users have access to this page?	Collection Administrator, Collection Manager
What does this functionality allow me to do?	Monitor the progress of Metadata Records through the peer review workflow.
Which page do I have to be in to access this functionality?	Peer Review Page
Steps	1. Click on the "Peer Review Progress" link under the "Monitor Review Progress" heading in Peer Review Page.
Result	The system will display a list of the peer review Metadata Records in the system. For each Metadata Record the system displays the following: • Metadata Record title. • The workflow name associated with this Metadata Record. • Current step name of workflow if review is in progress or shows 'completed' if review is already complete. • A link to review the Metadata Record peer review history. See View Review History for details about this page.

12.3.1 View Review History	
Which users have access to this page?	Collection Administrator, Collection Manager
What does this functionality allow me to do?	View the history of the actions taken on a Metadata Record.
Which page do I	View Summary Of Peer Review Progress

have to be in to access this functionality?	
Steps	1. Click on the "View review history" of a Metadata Record from View Summary Of Peer Review Progress.
Result	1. The system will display a list of actions taken on Metadata Record through the workflow process, the name of the user who took the action and the time the action was taken. 2. For reach review performed on the Metadata Record, the system will display a link to the Review Form. From here you can view the details of the review completed by a reviewer. For details see View Reviews Completed By Individual Reviewers.

12.3.2 View Reviews Completed By Individual Reviewers	
Which users have access to this page?	Collection Administrator, Collection Manager
What does this functionality allow me to do?	View the review completed by a Peer Reviewer in order to make the final decision on a Metadata Record.
Which page do I have to be in to access this functionality?	View Review History
Steps	1. Click on the "View review history" of a Metadata Record from View Review History page.
Result	The system displays the Review Form as completed by the reviewer, including the review decision and the comments made on the Metadata Record.