

Submission wizard

Users that have the permission to ADD content to at least one collection will have an easy to use and intuitive user interface (this is related to the use case: [End User - Easy and Intuitive Deposit Interface](#))

- three options to start a submission
 - (priority 1) Drag & drop area to supply a file with bibliographic references or the fulltext. Depending on the recognized file format a pluggable process will be triggered on the server to initialize one or more items
 - (priority 1) support for RIS, EndNote, BibTeX
 - (priority 1) support for CSV, TSV
 - (priority 1) support for PDF file with metadata extraction using fulltext parsing ([Grobid library](#)) with fallback to the pdf metadata
 - (priority 2) the system will assign the submission automatically to one of collection available to the user depending on some pluggable logic based on the extracted metadata (out-of-box a mapping between dc.type and collections will be supported)
 - (priority 3) ... extends to other (?) common file formats
 - (priority 1) Create a new item specifying an identifier. Depending on the recognised identifier type one or more pluggable providers will be queried to retrieve the actual metadata and maybe the fulltext. The submitter can force the use of a specific collection or rely on the automatic guess described above
 - (priority 1) retrieve the metadata from Crossref, PubMed, PubMed Europe, arXiv, Cinii, Scopus and Web of Science
 - (priority 2) retrieve the fulltext from PubMed Europe, arXiv
 - (priority 3) ... extends to other (?) providers (ADS, DBLP, ...)
 - (priority 1) Create a new item from scratch. Depending on the number of collections where the submission can be done a dropdown to select the target collection will be shown or not. A default could be set to streamline the process.
 - (priority 1) The submitter or the responsible of the workflow should be able to change the collection at any time - this is related to the use case: [Admin UI - Reviewers can move a submission to a different collection](#)
- once the submission is started a single form page is presented
 - (priority 1) options to enrich the record using identifiers or supplying file are still available
 - (priority 1) all the steps are presented as "accordion" in the same page giving immediate access to all the functionalities without the need to follow a single predefined linear process
 - (priority 1) the requested metadata are configured in an extended input-form configuration file with the following features
 - (priority 1) all the current options available in the input-form
 - (priority 1) additional input types: calendar, number
 - (priority 1) validation support: regex and ranges - this is related to the use case: [Structure - Format checking of data entry in input forms](#)
 - (priority 1) size of the input box
 - (priority 1) put multiple metadata on the same row to save space
 - (priority 1) require or not to specify the language for a metadata, supporting mandatory of one or more values in specific languages and/or avoid input of multiple values for the same language
 - (priority 2) group some metadata together to be able to collect and keep in sync linked information such as the author name and the affiliation, the journal title and the ISSN, etc.
 - (priority 1) upload files
 - (priority 1) additional technical metadata will be automatically recorded with a pluggable framework (out-of-box JHove will be integrated) - this is related to the use case: [Admin UI - Advanced Preservation - Format characterization](#)
 - (priority 2) Sherpa/Romeo integration
 - (priority 3) ability to configure descriptive metadata requested for each file - this is related to the use case: [Structure - Describe Individual Bitstream within an Item](#)
 - (priority 1) deposit license. A must to agree license is presented before to send the submission to the workflow
 - (priority 1) creative commons license integration
 - (priority 1) access condition for the item metadata and each single files can be easily set:
 - inheriting collection policies
 - setting or adding custom policies for specific groups with/without a date validity
- the system should detect near duplicates allowing the submitter to suspend or proceed the submission. This is related to the use case: [Detect potential duplicates](#) see also the [existent feature in DSpace-CRIS](#)

Macro changes required to the DSpace architecture

- (priority 1) the transition between the current linear steps based submission wizard to the "single page" model should be clarified:
 - when temporary data are saved?
 - how item aware services like the sherpa/romeo integration or the detect duplicate are invoked? is it required a stored incomplete workspaceitem or should be based on an item mock?
- (priority 1) the interaction with the BTE framework need to be revised to allow storing of the original PDF file or linked files in the generated item
- (priority 1) support the definition of custom accordion like the current visibile custom steps
- (priority 2) the inheritance of collection policies should be optional in the item creation
- (priority 3) a validation framework to allow pluggable complex rules to be checked against the whole item before the submission should be introduced
- (priority 4) it could be convenient to split the inputform in multiple files, one for each template definition

Related tasks

- (priority 1) a REST endpoint need to be created to support item(s) creation from a file containing bibliographic references (RIS, Endnote, BibTeX, etc.) or PDF with metadata extraction
- (priority 1) a REST endpoint need to be created to list the queued processes for an user
- (priority 1) define REST endpoints for the detect duplicate features and the sherpa/romeo integration
- (priority 1) define REST endpoint for the creative commons integration

MOCKUPS

i If you want propose changes to these mockups please add a comment in this page referencing to your own version of the mockups. The editable version of the mockup are linked just below each images. Clone the mockup page, make your own change editing the page and the balsamiq mockup and don't forget to link to your proposal in your comment!

The image shows a mockup of the DSpace 7 Submission form. The form is titled "New item" and includes several sections: "Collection", "Author/s", "Title", "Identifiers", "Indexing", "Files & access condition", "CC Licence", and "Distribution License". The form is annotated with several yellow callouts and red boxes. A callout on the left says "All the steps are presented as 'accordion'". A callout on the right says "Default group of metadata are automatically activated. Optional groups of metadata or steps can be added." Another callout on the right says "If one of the metadata in a group is filled with a value, for instance because the submission has been imported from an external datasource or is resumed by a previous edit the group will be activated automatically." A callout at the bottom right says "Mandatory field in an optional group will be required only if the group is active." A callout at the bottom center says "Once a file has been uploaded the files & access condition accordion will appear allowing editing of the file information and access condition". A callout in the middle right says "Group of metadata are bound to one primary metadata (author in this example) when a new author is entered all the coupled metadata are presented. Once input the information is showed in a compact form like 'tags' in the textarea with some icons to give immediate feedback about the coupled metadata (ORCID, affiliation, etc.). Tags can be reordered with drag&drop, removed or clicking on it open to be further edit". The form also includes a "Discard" button, a "Save for later" button, and a "Deposit" button. The browser address bar shows "DSpace 7 - Submission form".

[Edit form \(editable mockup\)](#)

DSpace 7 - Submission form

New item

Drop here the actual content or bibliographic records or [browse](#)

+ Add more ▾

Collection ? Sample collection ▾

Basic information ✔ ▾

Indexing ! ▾

Abstract ? En ▾

Keyword ? En ▾

Keyword 1 ✕ Keyword 2 ✕

Files & access condition ! ▾

CC Licence ! ▾

Distribution License ! ▾

Discard
Save for later
Deposit

An icon show the state of a section to indicate whether all mandatory fields have been compiled or not.

Edit form optional accordion (editable mockup)

New item

Drop here the actual content or bibliographic records or [browse](#)


+ Add more


Collection ?


Basic information	✓
Indexing	✓
Files & access condition	! ▲

! Please note that uploaded files in the "Sample collection" collection will be accessible, in addition to what is explicitly decided for the single file, with the following policies:

Institutional network

 **File_one.tif**
Title for File one
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras dignissim risus dapibus dictum euismod. Proin venenatis lacus sed quam cursus, eget porta velit scelerisque. Donec et magna et leo imperdiet vehicula. Fusce in sem at leo accum...
Open Access

 **File_two.tif**
Title for File two
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras dignissim risus dapibus dictum euismod. Proin venenatis lacus sed quam cursus, eget porta velit scelerisque. Donec et magna et leo imperdiet vehicula. Fusce in sem at leo accum...
Embargo until 15/10/2033

 **File_three.xml**
Title for File three
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras dignissim risus dapibus dictum euismod. Proin venenatis lacus sed quam cursus, eget porta velit scelerisque. Donec et magna et leo imperdiet vehicula. Fusce in sem at leo accum...
Open Access

CC Licence	! ▼
Distribution License	! ▼

This message is visible only if access policies preset are configured for the "Sample collection".

Files and access condition (editable mockups)

New item


 Drop here the actual content or bibliographic records or [browse](#)
+ Add more ▾

Collection ?

Basic information	✓ ▾
Indexing	✓ ▾
Files & access condition	! ▾

! Please note that uploaded files in the "Sample collection" collection will be accessible, in addition to what is explicitly decided for the single file, with the following policies:

Institutional network






File_one.tif

Title for File one

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras dignissim risus dapibus dictum euismod. Proin venenatis lacus sed quam cursus, eget porta velit scelerisque. Donec et magna et leo imperdiet vehicula. Fusce in sem at leo accum...

Open Access





File_two.tif

Title

Description:

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras dignissim risus dapibus dictum euismod. Proin venenatis lacus sed quam cursus, eget porta velit scelerisque. Donec et magna et leo imperdiet vehicula. Fusce in sem at leo accumsan viverra sagittis quis purus. Duis lacinia sodales pulvinar. Phasellus tempor bibendum sodales. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean id elit sagittis, convalis ex a, consectetur purus.

Access policies:

<input type="text" value="Open Access"/>	+ Add more
<input type="text" value="Lease"/>	Remove

Administrator

Lease
! ▾

Embargo
! ▾

Distribution
! ▾

Institutional network
! ▾

Not set

Discard
Save for later
Deposit

Files and access condition (editable mockups)

New item

Drop here the actual content or bibliographic records or [browse](#) + Add more

Collection ?


Basic information ✓

Indexing ✓


Files & access condition !

! Please note that uploaded files in the "Sample collection" collection will be accessible, in addition to what is explicitly decided for the single file, with the following policies:

Institutional network

 **File_one.tif** ✎ 🗑
Title for File one
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras dignissim risus dapibus dictum euismod. Proin venenatis lacus sed quam cursus, eget porta velit scelerisque. Donec et magna et leo imperdiet vehicula. Fusce in sem at leo accum...

Open Access

 **File_two.tif** 📄 🗑
Title

Description:

Access policies:
 + Add more
Until: 📅 Group:

CC Licence !

Distribution License !

"Lease" and "Embargo" options have the same options.

Files and access condition (editable mockups)

New item

Drop here the actual content or bibliographic records or [browse](#)

+ Add more

Collection ?

- Basic information ✓
- Indexing ✓
- Files & access condition !

Uploaded files in the "Sample collection" collection will be accessible according to the following policy: **Open Access**

File_one.tif
Title for File one
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras dignissim risus dapibus dictum euismod. Proin venenatis lacus sed quam cursus, eget porta velit scelerisque. Donec et magna et leo imperdiet vehicula. Fusce in sem at leo accum...

File_two.tif
Title

Description:

File_three.xml
Title for File three
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Cras dignissim risus dapibus dictum euismod. Proin venenatis lacus sed quam cursus, eget porta velit scelerisque. Donec et magna et leo imperdiet vehicula. Fusce in sem at leo accum...

CC Licence !
Distribution License !

Discard Save for later Deposit

This message is visible only if access polices preset are configured for the "Sample collection".

Files and access condition (editable mockups)

DSpace 7 - Submission form

New item

Drop here the actual content or bibliographic records or [browse](#) + Add more

Collection ? Sample collection

Basic information ✓

Indexing ✓

Files & access condition ✓

CC Licence !

Choose a license to apply:

Public Domain

CC0

Creative Commons

Not Set

Apply

Deposit Licence !

Discard Save for later Deposit

Edit form CC License (editable mockups)

DSpace 7 - Submission form

New item

Drop here the actual content or bibliographic records or [browse](#) + Add more

Collection ? Sample collection

Basic information ✓

Indexing ✓

Files & access condition ✓

CC Licence !

Choose a license to apply:

Creative Commons

Allow commercial uses of your work? Yes No

Allow modifications of your work? Yes No Share alike

Apply

Deposit Licence !

Discard Save for later Deposit

Edit form CC License (editable mockups)

DSpace 7 - Submission form


New item

Drop here the actual content or bibliographic records or [browse](#) + Add more

Collection ?

Basic information	✓
Indexing	✓
Files & access condition	✓
CC Licence	✓
Deposit Licence	!

Licence applied:



Remove

Edit form CC License (editable mockups)

DSpace 7 - Submission form

New item

Drop here the actual content or bibliographic records or [browse](#) + Add more

Collection ? Sample collection

Basic information	✓
Indexing	✓
Files & access condition	✓
CC Licence	✓
Deposit Licence	!

I declare that I have read and accepted the terms of the deposit license in the repository. Read the full license

Accept

Discard Save for later Deposit

Edit form Distribution License (editable mockups)

DSpace 7 - Submission form

New item

Drop here the actual content or bibliographic records or [browse](#) + Add more

Collection ?

Basic information	✓
Indexing	✓
Files & access condition	✓
CC Licence	✓
Deposit Licence	✓

I declare that I have read and accepted the terms of the deposit license in the repository. Read the full license

Accepted on 11/09/2017

Revoke

Discard Save for later Deposit

Edit form Distribution License (editable mockups)