

ComPADRE Editors Guide 2008

Figure 1 shows the pathway of an item from its initial submission through the tagging, librarian, and editorial processes (on right).

Everything submitted goes into the primary filter. It also goes into the filter of the collection to which it was submitted, where the editor can process it (on left).

Status codes indicate the status of an item on a particular collection.

Status Codes:

A = Active – Available to users

R = Awaiting Site Re-approval – Available to users. The record of the item has changed (other editors, usually).

F = Filter – Awaiting Librarian Approval (Can be moved to a collection by editor)

L = Librarian – Awaiting Cataloging Assignment

T = Awaiting tagging/cataloging – Assigned to cataloger, cataloging not complete

M = Awaiting Metadata approval – Cataloging complete, waiting for Librarian approval

E = Editor – Awaiting editor to assign “Choosing”

C = Choosing – Assigned for “Choosing”, choosing not complete

S = Awaiting Site Approval – Choosing complete, awaiting editor approval

X = Excluded – Item not in collection workflow (never included or declined)

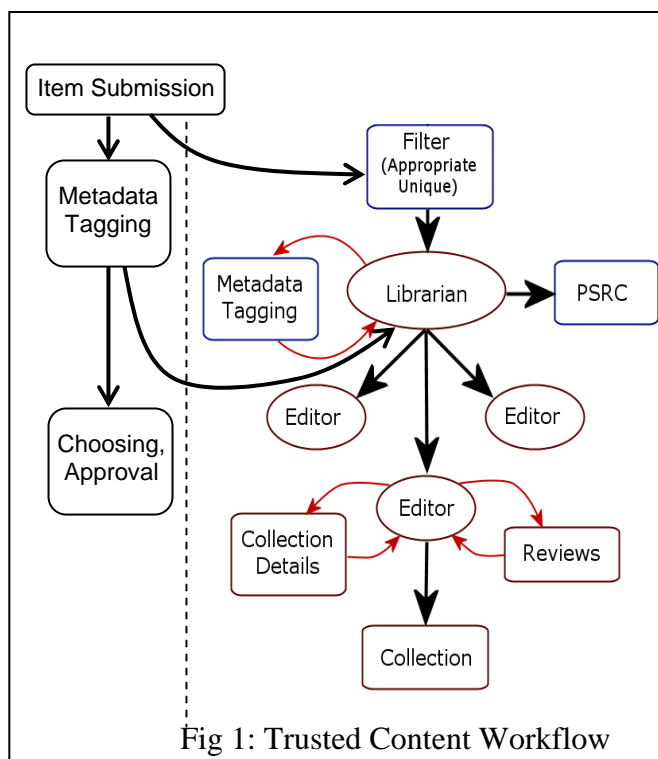
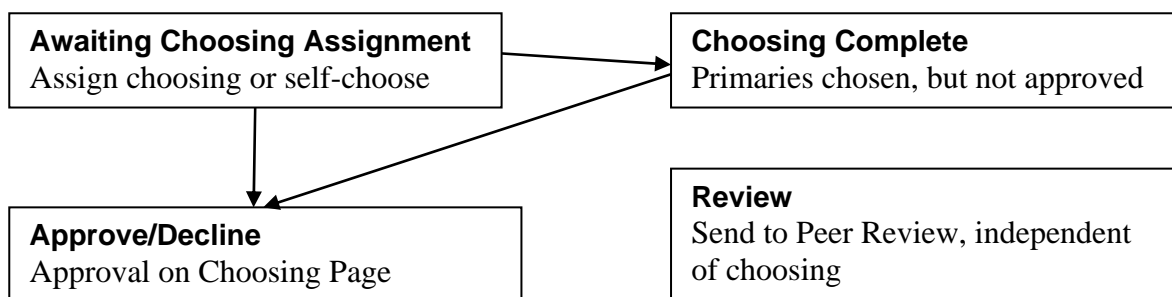


Fig 1: Trusted Content Workflow

Editor Workflow Page: “Primaries Choosing” (Item customization and approval)



Administrative Tools for Editors

Manage (Collection)	Manage Items	Manage Users
<ul style="list-style-type: none"> • Features • News & Events • Logs • Reviews • Surveys • Re-index 	<ul style="list-style-type: none"> • Editor Workflow • Librarian Workflow • Filter Suggestions • Location Checker 	<ul style="list-style-type: none"> • Accounts • Account Levels • Groups • VCards

Features: Manage special collection features, such as Archives or Featured Images.

News & Events: Manage news items (not time-based) or events related to your community.

Logs: View collection traffic logs: user hits, sessions, browses, searches, detail pages, etc.

Reviews: Manage peer review process, including assigning reviews and listing status of reviews. This requires a review form be created by an admin.

Surveys: Manage user surveys for the collection. This includes results of surveys.

Re-Index: Update the index of materials on your collection. Ask admins before doing.

Editor Workflow: This page shows items awaiting collection editor. It contains the following:

- **(Collection) Librarian Home** – See Librarian Workflow below
- **(Collection) Workflow Items Listing** – List of all items in collection workflow. Can be sorted by status or item name. It has options to process items.
- **Items - Awaiting Chooser Assignment** – Items needing assignment to a chooser or chooser group
- **Items-Choosing Complete** – Items with primaries chosen, but not approved (if any)
- **Your Choosing Assignments** – Items assigned to you for choosing, but not complete

Librarian Workflow: Items in collection with status L, T, M.

Filter Suggestions: Items in collection with status F. Items submitted to your collection by users will appear here. Items cloned by staff catalogers will also appear here.

Location Checker: Check whether an item is already in the database by URL and Title.

Accounts: Locate a user by name or login name. (Not accessible if not a group admin.)

Account Levels: Shows the permissions level of users (2 – normal, 5 – cataloger, 6 – editor, 8 – admin, 10 – webmaster).

Groups: Organize users on your collection. (Not accessible if not a group admin.)

VCards: Locate and edit any VCard created.

FAQ's

1. How do I change a status from an “R” to “A”?

“R” means Awaiting Site Re-approval following an edit to catalog record. Items with status “R” are viewable to users just the same if they have status “A”. To change the status back to “A”:

- 1) Go to Detail Page and click on Control Menu.
- 2) Click on “Primaries” to go to the Primaries Choosing page.
- 3) Review record and “Approve” at the bottom of the Choosing page.

2. I want to access an item that is active on another collection and add it into my own.

How do I do this?

- 1) Locate the item while on the collection where you have found it (using search or browse).
- 2) Go to the Detail Page and click on the “Control Menu”
- 3) Click on “Add into Workflow” as shown below.

(Your Collection) - X

[Add into Workflow](#) ← **Click here and follow directions**

Note that if the Control Menu looks like:

(Your Collection) – A (or R)

[Primaries](#) | [Standards](#) | [Relations](#) | [Annotations](#) | [Status](#) | [Editor Workflow](#)

The item is already active on your collection and you do not have to do anything.

If the control menu looks like:

(Your Collection) - E (or C or S)

[Primaries](#) | [Standards](#) | [Relations](#) | [Annotations](#) | [Editor Workflow](#)

The item is already in the collection workflow and can be processed normally.

3. Are there instances when I cannot pull an active item over from another collection?

No, this should not happen. If it does, please contact Bruce and Lyle.

4. I find an item using the Location Checker that is in the Filter or Librarian queue and is not active on any collection. Can I load it into my collection?

Yes, you can pull items from the Filter queue to your collection. You must be on your collection:

- 1) Go to the admin page and use the Location Checker to search for the item (URL or Title).
- 2) Click on the Title of the item to go to the detail page.
- 3) Go to the Control Menu
- 4) Click on Add to Workflow. Make sure there is not a duplicate.

(Your Collection) - F

[Add into Collection - Check for Duplicates First!](#) | [Standards](#) | [Relations](#) | [Annotations](#)

5. I was working on an item and lost my Internet connection or had to leave in the middle of my work. Where did it go?

- If you were doing Choosing, it should still be in your Editor Workflow under the Awaiting Choosing. It will be at the bottom.
- If you were cataloging an item in the initial submission process, it has gone to the Filter Suggestions page on your collection. (Note that this will only work on your collection.)

6. How can I quickly find something on the various workflow lists and pages?

Open the page and do a search. On PC's do a [CTRL-F]. In IE a search box will pop up. On Firefox, a search box will appear in the lower left border of the browser. On Mac's do an [Apple-F] (I think...).

7. What is the best way to ensure I don't duplicate a record?

Use the Location Checker.

- 1) Check the base of the URL. For example, for Florida State University the base of the URL would be "fsu.edu". Scroll or search through the results for the item.
- 2) Enter the full URL to check for the item.
- 3) Enter the page title as it appears on the web site. This will help to find mirror copies of a web page (same page, different URL).