

Depositor Reassignment

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Introduction

The ePrints Depositor Reassignment project was requested to provide the ability for users who deposit on behalf of other users (typically research assistants, faculty assistants or other research officers) and then have that item at a later date be reassigned to the original “author” of the paper that was being submitted. The idea was that when the paper was retrieved it would contain the name of the relevant academic and permit them to be contacted rather than the surrogate submitter.

Design Evolution

Original Design

The first design was for a system that exposed a simple field to the user to permit to input the name of the person they wished to reassign the item to. A report would run somewhere notifying library staff of the existence of a value and then they would examine the value. The staff member would then somehow work out the appropriate user name and put this into the same box and tick a box. At this point an overnight process would run and reassign all items that were marked to the user denoted in the text box. Through this process the new user was to be notified of their new assignment.

Prototype 1

The first solution to the problem utilised the author ID project's user popup picker to locate users and featured the checkbox however this was hidden to everyone except repository staff. Through a minor amount of research it was found that ePrints could automatically handle the reassignment of the item with a hook that was provided. This was utilised and it also handled clearing the fields handling the user and the checkbox.

This system required that a valid user identifier be located in the box. If a non-numeric value was entered into this field, it would be set to zero. This was deemed to be too complicated for staff and a slight redesign ensued. This system also didn't have a mechanism for emailing users however with consultation it was noted that the email sent could change every time in both the content and its recipients. In some cases only the original depositor should be notified or only the new depositor.

Prototype 2

The second prototype introduced a third field that was displayed to the user to enter a name. This was a free form text field and permitted the user to enter what ever they liked in the field. The other user ID field was hidden and is only available to administrative staff and the checkbox has remained hidden. This prototype featured a link to email users that prepopulated the two email addresses of both the original depositor and the new depositor.

It is this prototype that is demonstrated in this documentation.

User Guide

For Faculty Staff or Research Assistants

To reassign the depositing user of an item from yourself to one of the authors, first open the item up in your inbox, select the “notes” tab and in the “Reassign Depositor” field at the bottom of the screen enter the full name of the person who the item should belong to. Where possible notate their full name and provide an email address to contact them with. this is advised as the author may not already be within ePrints or might present an ambiguity between two authors. You should do this prior to submitting the document.

The screenshot shows the USQ ePrints Development Environment interface. At the top, there is a navigation bar with the USQ logo and the text 'UNIVERSITY OF SOUTHERN QUEENSLAND USQ ePrints Development Environment'. Below this is a search bar and a navigation menu with options like 'Home', 'About', 'Browse by', 'Year', 'Author/Editor', 'Format Type', 'Field Of Research', 'Faculty', 'Department', and 'Centre'. The main content area is titled 'Edit item: Flexural behavior of PC girders with large eccentric external tendons'. Below the title, there is a breadcrumb trail: 'Type → Upload → Bibliographic Information → Abstract and Keywords → FOR2008 → Subjects → Notes → Deposit'. The 'Notes' tab is currently selected. Below the breadcrumb trail, there are navigation buttons: '< Previous', 'Save for Later', and 'Next >'. The 'Additional Information' section is empty. The 'Comments and Suggestions' section contains a comment: 'AMH- can't find in Ulrichs, Google, or G Scholar 7/11/07. Email to author req. more details and copy of author version.' Below the comments, there is a 'Reassign Depositor' section with a text input field containing 'Sam Moffatt (ICT) (samuel.moffatt@usq.edu.au)'. The input field is highlighted with a blue border.

Note the section at the bottom:

This is a close-up screenshot of the 'Reassign Depositor' section. It shows a text input field with the text 'Sam Moffatt (ICT) (samuel.moffatt@usq.edu.au)'. Above the input field, there is a heading 'Reassign Depositor' and a sub-heading 'Enter the details of the depositor to which this ePrint should be assigned. Only people submitting on the behalf of other users should select this option to change the depositor. All reassignments are approved by repository staff.'

So in this case we've noted that the person who we should reassign this item to is “Sam Moffatt”, their department is noted in brackets and their email address is also included. This way an ePrint editor can look them up easily in either ePrints or contact them to get their account created within ePrints.

Until an item is deposited, ePrints staff members will ignore the value of this field. Once the item has been deposited they will complete the reassignment.

For ePrints Editors

ePrints editors get a slightly extended view of the same form. On screen they see the original “Reassign Depositor” field in addition to three other panels:

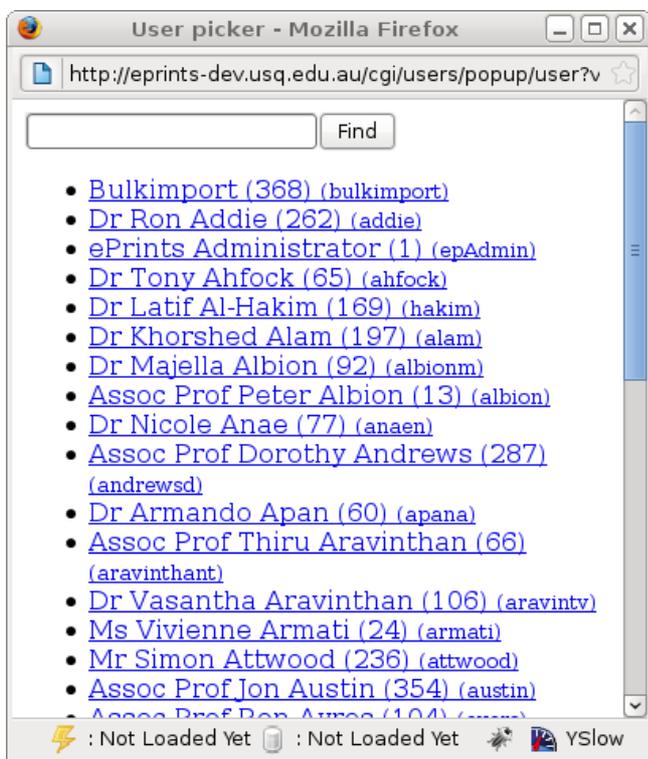
Reassign Depositor About this field

New Depositor About this field

New depositor ID is unset. Setting the depositor ID will activate this item.

Approve Depositor Reassignment About this field

When they first navigate to the screen, there will be no value for the new depositor field. This field utilises the ePrints user ID (the unique number to identify the user as opposed to the username they log in with) determine the user. If you know the user number, you can put this into the field and click “lookup”. It will update the form with the users name and activate the next panel down. Alternatively you can click on “Find Entry” and a new window will popup to allow you to find the specific user:



The search box at the top of the screen permits you to enter the start of the persons first name or last name as well as a number identifying the user. The list return is limited to 40 items and displays their name, their user ID and their username. Clicking on the name will close the window and automatically populate the new depositor screen and refresh the page.

Reassign Depositor

Enter the details of the depositor to which this ePrint should be assigned. Only people submitting on the behalf of other users should select this option to change the depositor. All reassignments are approved by repository staff.

Sam Moffatt (ICT) (samuel.moffatt@usq.edu.au)

New Depositor

Select the new depositor for this ePrint to reassign them as the depositor. There is no issue if this is set to 0.

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Mr Sam Moffatt

Lookup

Find entry

[Click here to populate a new email message to the depositors](#)

Approve Depositor Reassignment

Ticking this box will trigger the reassignment of this item's depositor to the value specified in the new depositor field.

Once you have set the depositor either by entering their username and clicking lookup or using the "Find Entry" popup, the screen will refresh to display their name next to the lookup button and will display a link which pre-populates an email addressed to both the user who has just been selected and the original depositor (in the CC field). The message is pre-filled with both names as relevant:

The screenshot shows an email composition window with the following details:

- From:** Sam Moffatt <Samuel.Moffatt@usq.edu.au>
- To:** moffatts@usq.edu.au
- Cc:** eprints@usq.edu.au
- Subject:** EPrints Depositor Reassignment
- Text:** Hi Mr Sam Moffatt,
An item has been deposited on your behalf by ePrints Administrator.
You can view this item here: <http://eprints-dev.usq.edu.au/3502/>

Note: the email is originally one line with spaces, where these spaces are a new line has been placed.

When the “approve depositor reassignment” checkbox is ticked the value of the depositor field for the ePrint is altered to the value specified in the new depositor field. After this has been done the check, the reassign depositor field and the new depositor fields are cleared of their values.

Developer Guide

In ePrints when an eprint is deposited it is marked against the user who deposited it. This user has the ability to do tasks with the paper until it is submitted for review and it eventually works its way into the repository. When it is in the repository this is the name that is assigned to the document.

Here at USQ we have cases where we have departmental staff in faculties or research centres that deposit papers on the behalf of academics. These might be secretaries or research assistants who handle the initial entry of data into the system, attaching the paper and the other tasks that are required. At the end of this process the library wanted to change the depositor from this user and reassign it to the primary author of the paper. So they needed a way to reassign the depositor. They didn't want this to occur immediately and wanted to have some control over the reassignment. Initially I built it with a user picker for the depositor to select the new user however the Library requested a generic text field instead that the depositor could use to type the details of the person to which they wished the depositor reassigned.

So the first step in all of this drama is to add a few fields. We ended up with three fields: the first was a field for the depositors to enter the name of the user who the item should be reassigned to, the second was an ItemRef field which linked to the user table to have a representation of the user and the last was a checkbox which controlled if the user of the item is reassigned. The first field is visible to any one in the repository who has an account whilst the last two are visible only to repository staff (e.g. editors or administrators).

So to do this, we need to navigate to `/opt/eprints3/archives/[archivename]/cfg/cfg.d/eprints_fields.pl` and add the following:

```
{
  'name' => 'new_depositor_name',
  'type' => 'text'
},
{
  'name' => 'new_depositor_assignment',
  'type' => 'itemref',
  'datasetid' => 'user'
},
{
  'name' => 'new_depositor_update',
  'input_style' => 'checkbox',
  'type' => 'boolean'
}
```

Once we've done this, you need to run `"/opt/eprints3/bin/epadmin update_database_structure [archivename]"` to add the new fields to the database.

The next task we need to do is add this to the eprint workflow so that the fields turn up on the screen. This can be achieved by going to `"/opt/eprints3/archives/[archivename]/cfg/workflows/eprint/default.xml"` and adding it into one of the stages. I picked the "Notes" stage or tab to put it in, eventually it looked like this:

```
<stage name="notes">
<component><field ref="new_depositor_name"/></component>
<epc:if test="$STAFF_ONLY = 'TRUE'">
<component><field ref="new_depositor_assignment"/></component>
<component><field ref="new_depositor_update"/></component>
</epc:if>
</stage>
```

If you don't have a "notes" stage already, you will need to add a new one to the flow at the top, if you're using a standard ePrints configuration, it will look similar to this:

```
<flow>
<stage ref="type"/>
<stage ref="files"/>
<stage ref="core"/>
<stage ref="subjects"/>
```

```
<stage ref="notes"/>
</flow>
```

Pretty easy! The next step is to add some translations in `"/opt/eprints3/archives/[archivename]/cfg/lang/en/phrases/eprint_fields.xml"`. Add these lines before the final `</epp:phrases>` line:

```
<phrase id="eprint_fieldname_new_depositor_name">Reassign Depositor</phrase>
<phrase id="eprint_fieldhelp_new_depositor_name">Enter the details of the depositor to which this
ePrint should be assigned. Only people submitting on the behalf of other users should select this
option to change the depositor. All reassignments are approved by repository staff.</phrase>
<phrase id="eprint_fieldname_new_depositor_assignment">New Depositor</phrase>
<phrase id="eprint_fieldhelp_new_depositor_assignment">Select the new depositor for this ePrint to
reassign them as the depositor. There is no issue if this is set to 0.</phrase>
<phrase id="eprint_fieldname_new_depositor_update">Approve Depositor Reassignment</phrase>
<phrase id="eprint_fieldhelp_new_depositor_update">Ticking this box will trigger the reassignment
of this item's depositor to the value specified in the new depositor field.</phrase>
```

So there are two phrases for each field, the name and the help text that goes with it. Most of it is pretty self explanatory. The final step in this trip is to alter `"/opt/eprints3/archives/usqep3/cfg/cfg.d/eprint_fields_automatic.pl"` to set it so that it will change the depositor of the item once the tick box is checked.

```
$c->{set_eprint_automatic_fields} = sub
{
my( $eprint ) = @_;
# Depositor Reassignment
if( $eprint->get_value( "new_depositor_update" ) eq "TRUE" && $eprint-
>get_value( "new_depositor_assignment" ) != 0 )
{
$eprint->set_value( "userid", $eprint->get_value( "new_depositor_assignment" ) );
$eprint->set_value( "new_depositor_assignment", "" );
$eprint->set_value( "new_depositor_name", "" );
$eprint->set_value( "new_depositor_update", "FALSE" );
}
# End Depositor Reassignment
my $type = $eprint->get_value( "type" );
if( $type eq "monograph" || $type eq "thesis" )
{
```

These nine lines surrounded by Depositor Reassignment is inserted where it is and at this point we're done. We'll need to restart the server before we get too far just to ensure that everything takes properly and then we can test it all out.

The workflow at this point is that a user of the system marks down the person they wish to reassign as the depositor. We have an overnight report which runs to email one of our repository editors to notify them of items that are being requested to be transferred. They then view these items and enter the user ID of the user in question into the new depositor field (they can use lookup to validate it) and at this point they need to check the box to actually update the assignment. In ticking the box the the depositor is set to the value of the new depositor field, the reassignment field is blanked, the new depositor field is blanked and the check is cleared.

The most unfriendly aspect of this is finding the user in question. To do so you need to traverse the user search, find the user and then grab their user ID and put it in the field. This is a bit much. We also wanted to have the option to send an email but the editors need to be able to customise the email before it is sent and wanted control.

Fortunately the solution to the first problem was to utilise the Itemref custom InputForm Component that I created for the Author ID project. The second was to create a new one that primitively created a "mailto" link with a lot of the details pre-populated. For the latter I might have been able to do it within the workflow language but I felt it was easier to build in Perl. Before we begin, we're going to need a few files:

- The "Itemref.pm" file needs to be put in the "/opt/eprints3/perl_lib/EPrints/Plugin/InputForm/Component" directory.
- The "USQ_DepositorEmail.pm" file needs to be put in the "/opt/eprints3/perl_lib/EPrints/Plugin/InputForm" directory.
- The "user" file needs to be put in the "/opt/eprints3/cgi/users/popup/user" directory. The "popup" directory might not exist in your installation and will probably have to be added first.

Once you've got these files in place we're ready to do some more modifications. In the ***"/opt/eprints3/archives/[archivename]/cfg/workflows/eprint/default.xml"*** file where we had the following:

```
<component><field ref="new_depositor_assignment"/></component>
```

We're going to change that to the following:

```
<component type="Field::Itemref">
  <field ref="new_depositor_assignment" external_lookup_url="{${config{perl_url}}}/users/popup/
  user" external_lookup_params="userid="/>
</component>
```

This then tells the system to add a new "Find Entry" button which will popup with the user search window. The user search is limited to repository users so anyone who isn't authorised will receive a login request form. It also tells ePrints to use the new Itemref Component to handle this field as well, which is what puts the Find Entry button and handles the other logic. To add the email option, we add a single line after the above mentioned on to load it up:

```
<component type="USQ_DepositorEmail" />
```

Pretty simple changes here so far - this then puts some text with a link up if we need it. The last change we need to make is to include this into our language files. There are a few strings, we'll just put them into the ***"/opt/eprints3/archives/[archivename]/cfg/lang/en/phrases/eprint_fields.xml"*** file we used previously:

```
<epp:phrase id="Plugin/InputForm/Component/USQ_DepositorEmail:mail_depositors">Click here to
populate a new email message to the depositors</phrase>
<epp:phrase id="Plugin/InputForm/Component/USQ_DepositorEmail:email_message_subject">EPrints
Depositor Reassignment</phrase>
<epp:phrase id="Plugin/InputForm/Component/USQ_DepositorEmail:email_message_body">Hi <pin
name="new_depositor" />,
An item has been deposited on your behalf by <pin name="current_depositor" />.
You can view this item here: <pin name="eprint_url" /></phrase>
<epp:phrase id="Plugin/InputForm/Component/USQ_DepositorEmail:new_depositor_id_unset">New
depositor ID is unset. Setting the depositor ID will activate this item.</phrase>
<epp:phrase id="lib/metafield/itemref:find_entry">Find entry</phrase>
```

All pretty simple, again these lines should be inserted before the `</epp:phrases>` line in the file. Once you've done this, restart the server again to pick up all of the changes and you should see a user picker interface and a little bit of text you can click to make a quick email message. You can customise the email message by altering the language strings to change what you want to display.