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EQUELLA Workflow Moderation Guide

Version 6.5

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Workflow moderation overview

An EQUELLA workflow is a process whereby a new resource must pass through one or more stages of review or moderation before becoming fully available. The process notifies designated users when they must moderate the resource. A workflow is associated with a collection and can be a simple one-step review or a complex multi-step editorial and technical review comprising multiple publication paths.

An EQUELLA workflow provides a structure for an institution's quality assurance processes. Workflows are used to record the outcomes of each moderation task review and move resources through the review process based on these outcomes. Workflows are typically created by a Content Administrator, who designates reviewers (moderators) and determines the structure of the workflow.

The purpose of this guide is to explain the moderation and review process and demonstrate to users how to perform workflow moderation tasks. Information on workflow creation for administrators is provided in the *EQUELLA Workflow Configuration Guide*.

Please note that this guide has been developed to best reflect the full capabilities of EQUELLA, and as such may differ from your own installation. Contact a System Administrator for access to extra features or to reconfigure your installation.

The workflow process

A workflow is typically created by a Content Administrator as an ordered process that has rules for passing a resource from one step to the next. The Content Administrator designates users, groups or roles to a moderation task to create workflow task moderators. Workflow task moderators can be allocated to multiple moderation tasks with moderator options determined by the workflow creator that can include: rejection, modification, acceptance by one designated moderator or acceptance by all in a group of designated moderators.

Once the moderators have completed their review the next workflow step is determined by the moderator responses. The workflow history displays the resource's workflow progress and can be used to view all review events and moderators.

Resources can enter moderation when they are:

- Contributed—the contributor chooses to submit the resource for moderation and the resource enters the workflow associated with the contributed collection;
- Versioned—a new version enters the workflow and on completion archives all other 'live' versions; or
- Reviewed—a resource that has been 'live' for a designated period is checked for currency using its associated workflow. This process can be triggered manually by the resource owner or automatically by the collection definition. The resource remains discoverable during this review.

Contribute a resource for moderation

Resources can only be submitted for moderation using a collection that has an associated workflow.

Below is an example resource contribution using a *Documentation* collection which has an associated 'Documentation Workflow' workflow. This collection and workflow has been created as an example, and will be different to collections and workflows at your institution.

To contribute a resource for moderation

1. **Contribute** a resource using a relevant contribution wizard with an associated workflow.

NOTE: In the example below, a contribution wizard has been set up with a **Details** and a **Workflow details** page to illustrate how a workflow may work. Contribution wizards at your institution will be configured differently and resources may enter a workflow automatically on saving the resource.

2. Enter the relevant metadata to complete the **Details** page of the wizard. Add required attachments.
3. Click **Next** → to display the **Workflow details** page. An example is shown in Figure 1.

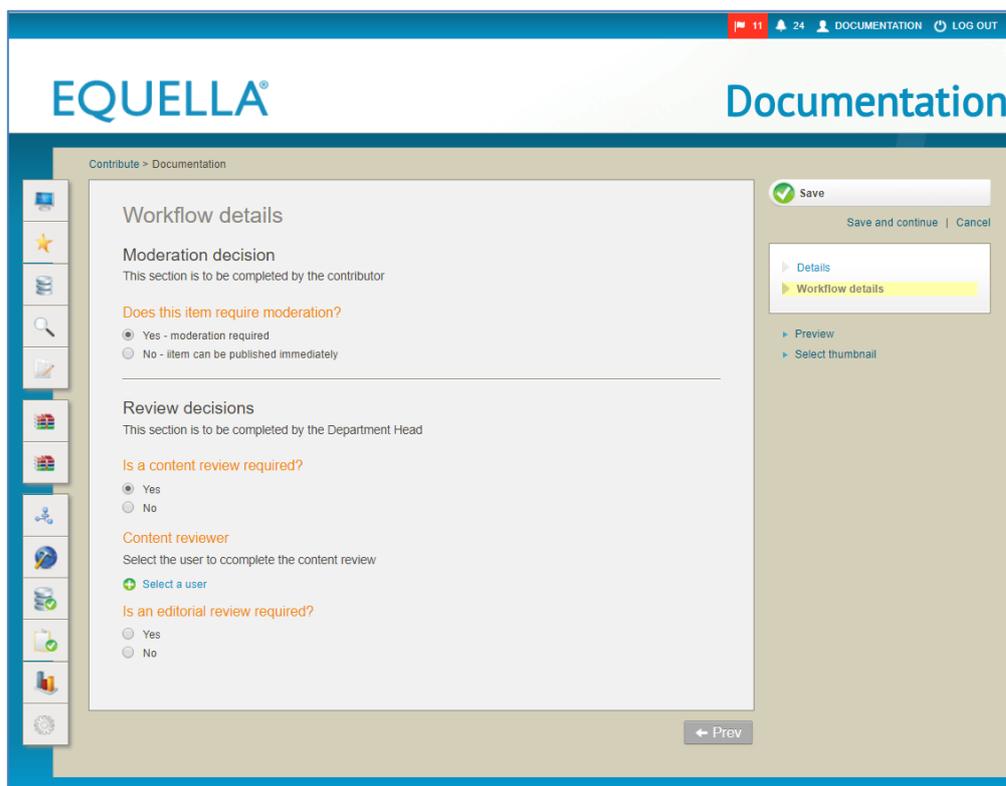


Figure 1 Documentation collection wizard Workflow details page

4. In the *Moderation decision* section, select either:
 - **Yes – moderation required** – options in the *Review decisions* section need to be selected before submitting for moderation and starting the workflow steps, or

- **No – item can be published immediately** which means on submitting to workflow, the item will skip other moderation tasks to move straight to the end of the workflow as a ‘live’ item.

The **Review Decisions** section establishes the structure of the workflow and includes a user selector wizard control to determine who will conduct the content review. This section will be completed as the first step of the example workflow.

5. Click . The **Save** dialog displays, as shown in Figure 2.



Figure 2 Save dialog

6. Enter a message if required (which can be viewed from the Moderation page), then click  to enter the resource into the documentation workflow. Saving as draft will save the resource, but will not enter it into the workflow, nor make it ‘live’.
- The Resource summary page displays. An example is shown in Figure 3.

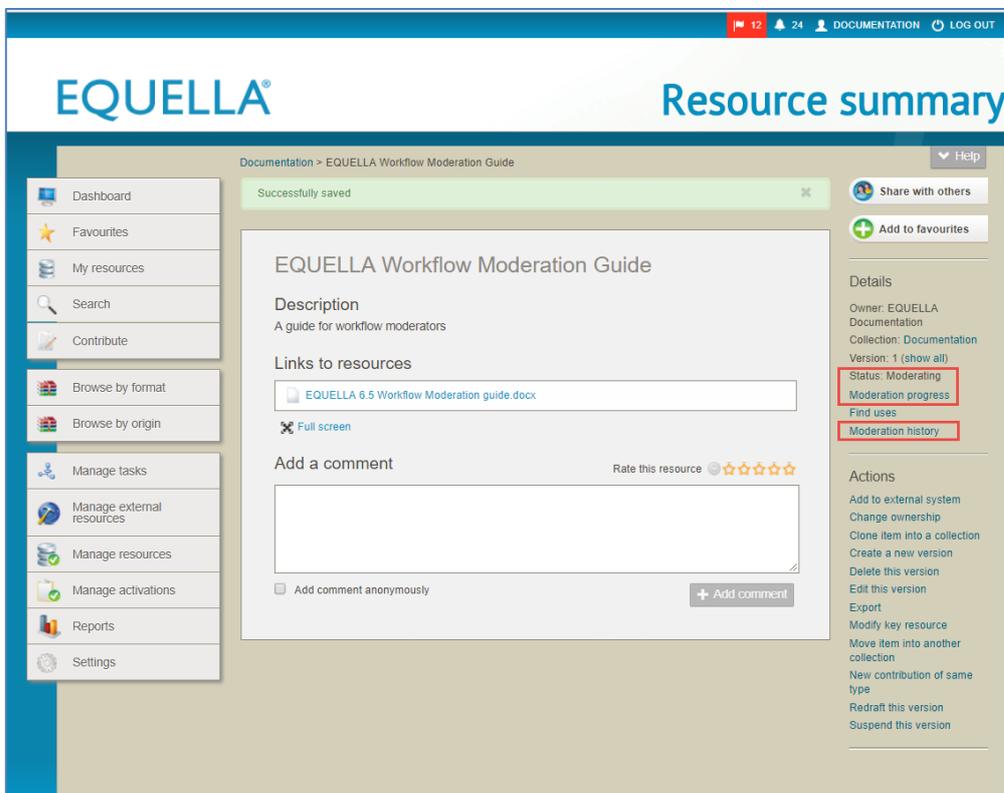


Figure 3 Resource summary page

The Resource summary page **Details** section shows the following links relevant to the workflow:

- **Status: *Moderating***—the resource has just entered the workflow, and is at the first moderation point.
- **Moderation progress**— select this link to display the **Moderation progress** page and see a diagrammatic representation of the workflow. See [Moderation progress](#) on page 7 for more information.
- **Moderation history**—select this link to open the **Moderation history** page. See [Moderation history](#) on page 8 for more information.

Moderation progress

The **Moderation progress** link can be found in the *Details* section of the Resource summary page, and at the bottom of each result on the My tasks page (see [My tasks page](#) on page 13).

Select this link to display the **Moderation progress** page and see a diagrammatic representation of the workflow.

The current step is highlighted in yellow, completed tasks are highlighted in green and a **Tasks awaiting moderation** list displays at the top of the flow chart with moderator details. An example is shown in Figure 4.

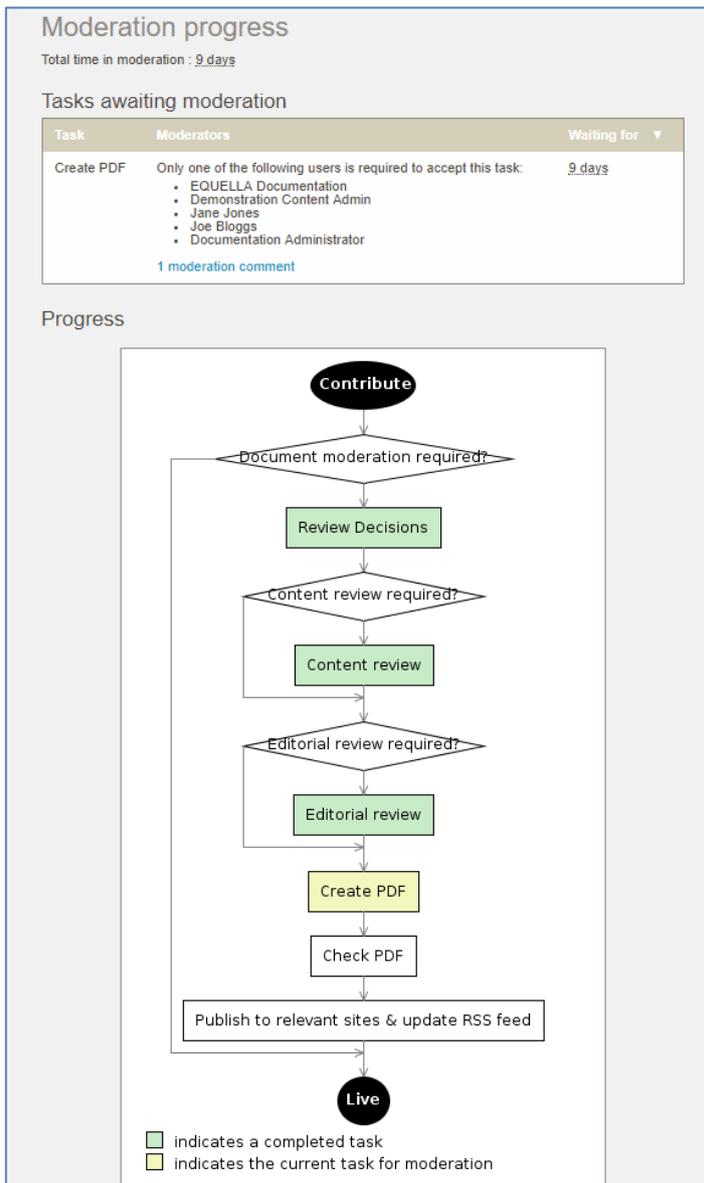


Figure 4 Moderation progress page

Moderation history

The **Moderation history** link can be found in the Details section of the Resource summary page. Select this link to display the **Moderation history** page.

A resource's Moderation history page provides details on any submission, status change and moderation events pertaining to this resource. An example is shown in Figure 5.

Moderation history

Event	User	Date ▾
Reset to task <i>Content review</i>	EQUELLA Documentation	9 days ago
Contributed	EQUELLA Documentation	9 days ago

Basic details
 Include edits
 Include all moderation details

Figure 5 Moderation history page

The Moderation history page has the following elements:

- **Event** (*Submitted for moderation, Went live* etc.)— a descriptive name of the event.
- **User**—the user who performed the event.
- **Date**—how much time has passed since this event was performed (approximate). Hover over this value to display the exact date and time details.
- **Include edits**—displays Edit events in the history.
- **Include all moderation details**—shows all Edit and Workflow reset events. An example of the Moderation history page with *Include all moderation details* selected is shown in Figure 6.

Moderation history

Event	User	Date ▾
Accepted for task <i>Editorial review</i> (Show comment)	EQUELLA Documentation	9 days ago
Accepted for task <i>Content review</i> (Show comment)	EQUELLA Documentation	9 days ago
Reset to task <i>Content review</i>	EQUELLA Documentation	9 days ago
Edited	EQUELLA Documentation	9 days ago
Accepted for task <i>Review Decisions</i>	EQUELLA Documentation	9 days ago
Workflow reset	EQUELLA Documentation	9 days ago
Submitted for moderation	EQUELLA Documentation	9 days ago
Edited	EQUELLA Documentation	9 days ago
Contributed	EQUELLA Documentation	9 days ago

Basic details
 Include edits
 Include all moderation details

Figure 6 Moderation history with *Include all moderation details* selected

Workflow comments can be viewed by clicking on the **Show comment** links.

NOTE: *Workflow file attachments added during moderation are not available to view in the Moderation history. They can be viewed in the Comments area of the moderation page. See [Moderation comments and files](#) on page 20.*

Moderation queue

The **Moderation queue** enables the logged-in user to view all their resources currently waiting for moderation within a workflow. The **Moderation queue** link is accessed from the **My resources** page.

To view the Moderation queue page

1. Select **My resources** from the navigation menu. The **My resources** page displays. The default on first entering My resources is **Published** resources.
2. Click the **Moderation queue** link at the top of the page. The results display all resources belonging to the logged-in user that are currently in a moderation workflow. An example is shown in Figure 7.

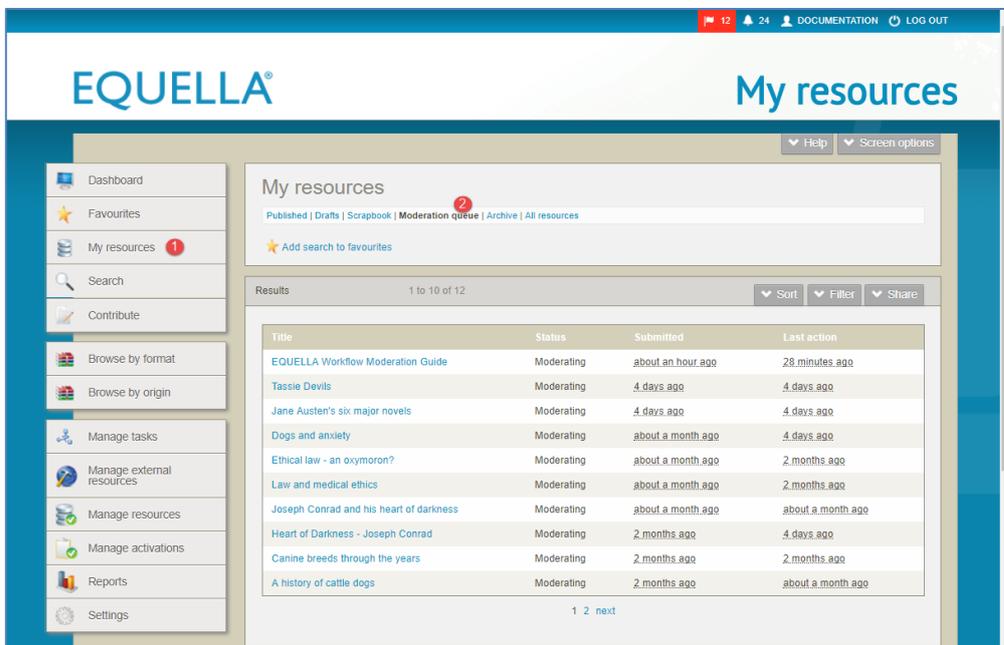


Figure 7 My resources - Moderation queue

The Moderation queue results page elements include:

- **Title**—the resource title. Select the link to go to the Resource summary page.
- **Status**—the resource status on this page will be either *Moderating*, *Review*, *Live* or *Rejected*. If the status is *Rejected*, a **Show comment** link displays. Select this link to view the rejection comment.
- **Submitted**—the time in days since the resource entered moderation. Hover over this value to display the exact date and time details. An example is shown in Figure 8

Title	Status	Submitted	Last action
EQUELLA Workflow Moderation Guide	Moderating	about an hour ago	31 minutes ago
Tassie Devils	Moderating	4 days ago	4 days ago
Jane Austen's six major novels	Moderating	4 days ago	4 days ago
Dogs and anxiety	Moderating	about a month ago	4 days ago
Ethical law - an oxymoron?	Moderating	about a month ago	2 months ago
Law and medical ethics	Moderating	about a month ago	2 months ago
Joseph Conrad and his heart of darkness	Moderating	about 26 September 2017 4:41 PM	month ago
Heart of Darkness - Joseph Conrad	Moderating	2 months ago	4 days ago
Canine breeds through the years	Moderating	2 months ago	2 months ago
A history of cattle dogs	Moderating	2 months ago	about a month ago

1 2 next

Figure 8 Exact Date displayed when mouse hovered over Submitted value

- **Last action**—the time in days since the last moderation task was performed on the resource. Hover over this value to display the exact date and time details.
- **Page controls**—click the **prev**, **(x)** or **next** links to move through the pages.

Tasks

After a resource has been submitted for moderation, users allocated to the first moderation task will have the task added to their **My tasks** page. As the resource moves through the workflow steps, the relevant users will receive their tasks.

The user is notified of pending tasks with the My tasks icon (flag and number of waiting tasks) shown in red at the top of the page. This icon displays as grey with a zero (0) when there are no tasks pending. An example is shown in Figure 9.

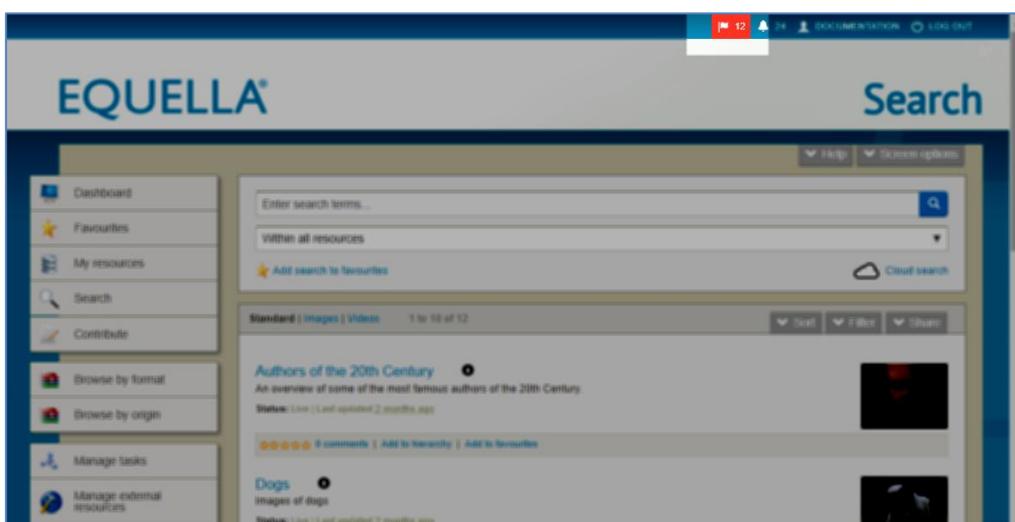


Figure 9 My tasks icon with pending tasks

Clicking on the **My tasks** icon displays the My tasks page with all pending tasks displayed. See [My tasks page](#) on page 13 for more information.

Tasks portlet

The **Tasks** portlet on the Dashboard page also shows the user the number of pending tasks. An example is shown in Figure 10.



Figure 10 Tasks portlet

Each item on the Tasks portlet is a link. In the tasks section of the portlet, selecting any link takes the user to the **My tasks** page, with the relevant tasks displayed. The Tasks portlet includes notifications. See [Notifications](#) on page 31 for more information.

Selecting the following task links opens the My tasks page and displays:

- **All tasks**—all tasks waiting for moderation where the logged-in user is set as a moderator.
- **Tasks assigned to me**—tasks waiting for moderation where the task has been assigned to the logged-in user. See [Assigning tasks](#) on page 20 for more information.
- **Tasks assigned to others**—tasks where the logged-in user is set as one of a number of possible moderators and another moderator is assigned to those tasks. This allows the logged-in user access to the task for review purposes, even though it has been assigned to another moderator.
- **Unassigned tasks**—tasks waiting for moderation where the currently logged-in user is set as a moderator in a moderation group but the tasks are not specifically assigned.
- **Must moderate**—tasks waiting for moderation where the currently logged-in user is set as the only moderator.

My tasks page

The **My tasks page** displays the tasks waiting to be moderated where the logged in user is an appointed moderator. An example is shown in Figure 11.

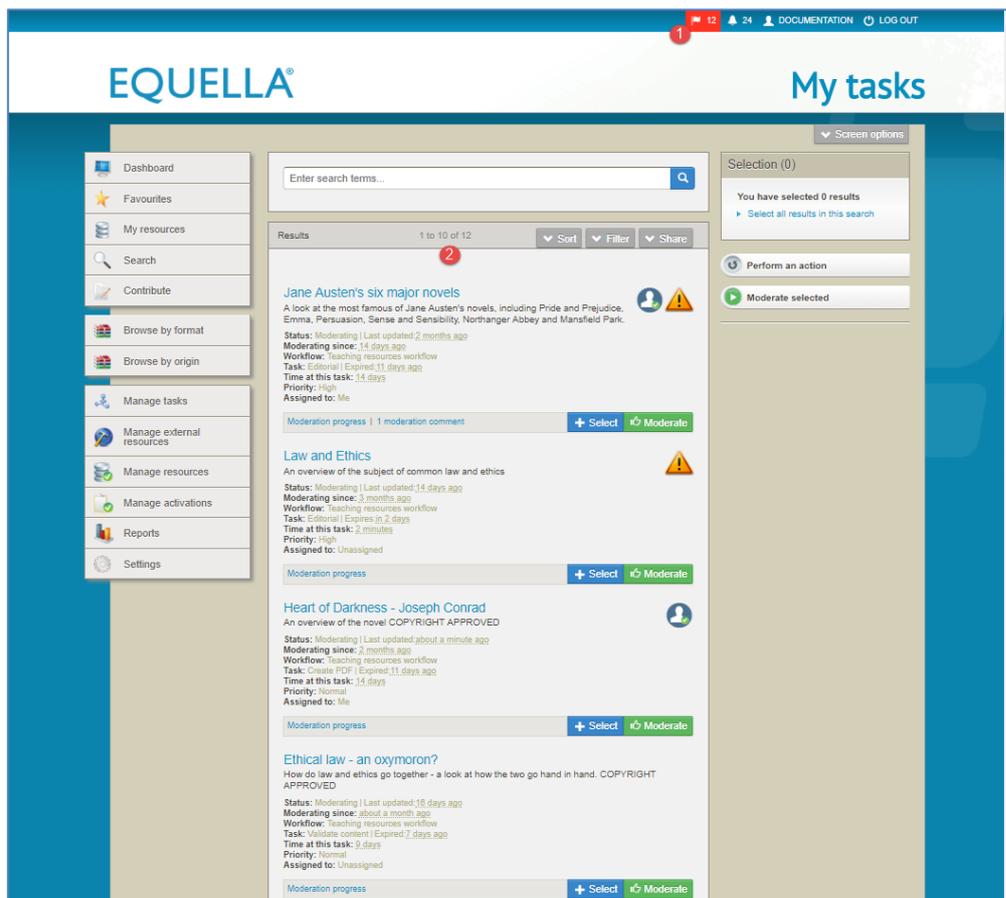


Figure 11 My tasks page

The tasks on the **My tasks** page are displayed in the following default order:

- **Priority** (High, Normal then Low), then
- **Assignment** (Me, Unassigned then assigned to another user), then
- **Time at this task**

Tasks where the priority is set to **High** display with an  icon.

Tasks assigned specifically to the logged in user display with an  icon.

The **My tasks** page elements are:

- **Resource title**—click on the resource title to open the *Resource summary* page with the *Task moderation* section displayed at the top of the page.
- **Status**—this could be *Moderating*, *Review*, *Live* or *Rejected*.
- **Last updated**—time since the resource was last updated (edited). Hover over this value to display the exact date and time details.
- **Moderating since**—time since resource entered the workflow. Hover over this value to display the exact date and time details.

- **Workflow** – name of the associated workflow.
- **Task**—the name of the current workflow task.
- **Expires / Expired**—number of days before or since task expiry date.
- **Time at this task**—time since resource arrived at this workflow task.
- **Priority**—the priority of the task (can be *Low*, *Normal* or *High*).
- **Assigned to** – name of assigned user. Values can be *Me* (logged in user), *Unassigned* or a specific user’s name (e.g *Joe Bloggs*).
- **Moderation progress**—select this link to see a diagrammatic representation of the workflow. See [Moderation progress](#) on page 7 for more information.
- **(x) moderation comments**—select this link to view comments that have been added during the moderation process. See [Moderation comments and files](#) on page 20.
-  **Select**—click to select the task for further actions.
-  **Moderate**—click to open the resource in a read-only contribution wizard view, with the Task moderation section displayed at the top of the page.
- **Selection box** - shows the number of tasks currently selected in brackets, and the following links:
 - **View selected results** – click this link to display only selected tasks
 - **Unselect all results** – unselects any tasks currently selected
 - **Select all results in this search** – selects all tasks in the current search results

An example of the Selection box is shown in Figure 12.



Figure 12 My tasks - Selection box

-  **Perform an action** - click this button to approve or reject the selected tasks in one action.

NOTE: This option will not display if the logged in user has not been granted the bulk approve and/or bulk reject privileges (see [Bulk approval or rejection of tasks](#) on page 27).

-  **Moderate selected** - click this button to sequentially moderate a selected group of tasks without returning to the My tasks page after each task has been moderated (see [Sequential task processing](#) on page 26).

Sort and filter

Sort

The **Sort** options on the My tasks **Sort** tab display options relevant to tasks. An example of the **Sort** tab options is shown in Figure 13.

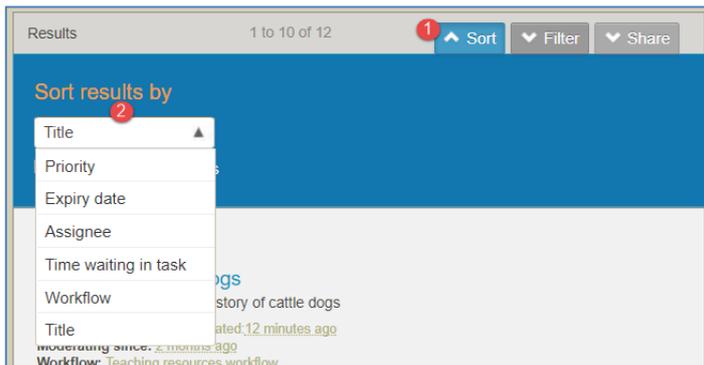


Figure 13 My tasks sort box

The sort options are:

- **Priority**—the priority of the resource’s current workflow task.
- **Expiry date**—the date set as the last day that the task can be performed.
- **Assignee** – assignment (*Me, Unassigned* and other users (e.g. *Joe Bloggs*)).
- **Time waiting in task**—time since resource arrived at current workflow task.
- **Workflow** – workflow name.
- **Title**—name of the resource.
- **Reverse order of results**—check to reverse the order in which the results display.

Filter

The My tasks **Filter** tab displays options relevant to tasks. An example of the **Filter** tab is shown in Figure 14.

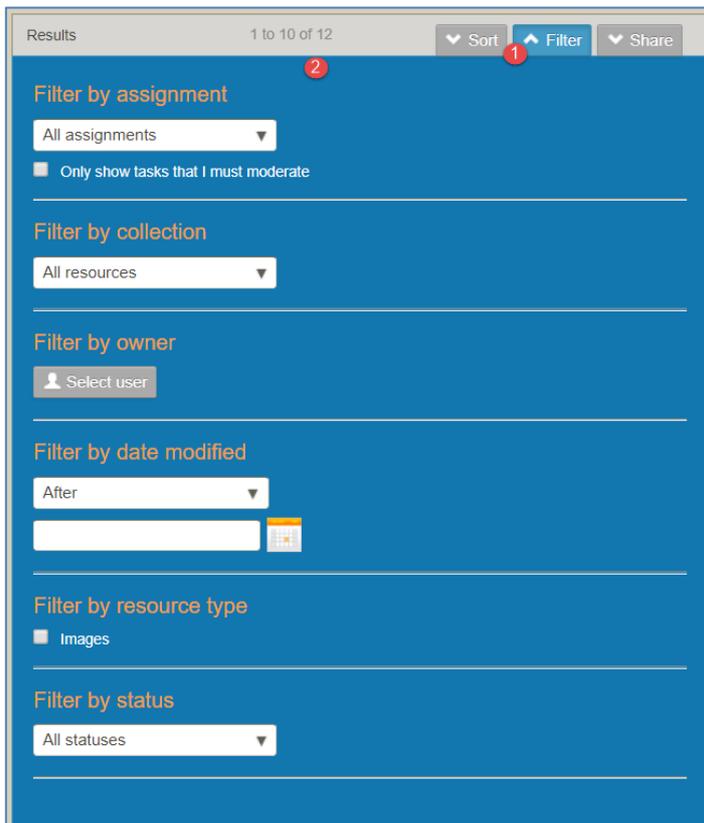


Figure 14 My tasks filter box

From the My tasks page, the following filter options are available:

- **Filter by assignment**—select a value from the drop-down list. Available options are *All assignments*, *Assigned to me*, *Assigned to others* and *Unassigned*.
- **Show only tasks that I must moderate** – check to display tasks where you are the only moderator.
- **Filter by collection**—select the required collection from the drop-down list to see only tasks related to resources belonging to that collection. Once a collection is selected, a **Filter by workflow tasks** drop-down displays. Workflow tasks belonging to the workflow associated with the selected collection display. A specific workflow task can be selected.
- **Filter by owner**—click  to display the **Select owner to filter by dialog** and search for and select the required owner.
- **Filter by date modified**—select a qualifier from the drop-down list (*After*, *Before*, *Between* or *On*), then click the calendar field or icon to display a calendar control.
- **Filter by status** - select to show only resources with the selected status. Available values are *Moderating*, *Live* and *Review*

Moderating a task

Accessing task moderation

Tasks can be moderated from the Resource summary page or the Contribution wizard page. Moderating from the contribution wizard page enables the moderator to access all the metadata stored during contribution, depending on workflow configuration.

To moderate from the resource summary page

1. From the **My tasks** page, click on the relevant resource's title link. The resource summary page opens with the task moderation panel displaying above the resource details. An example is shown in Figure 15.

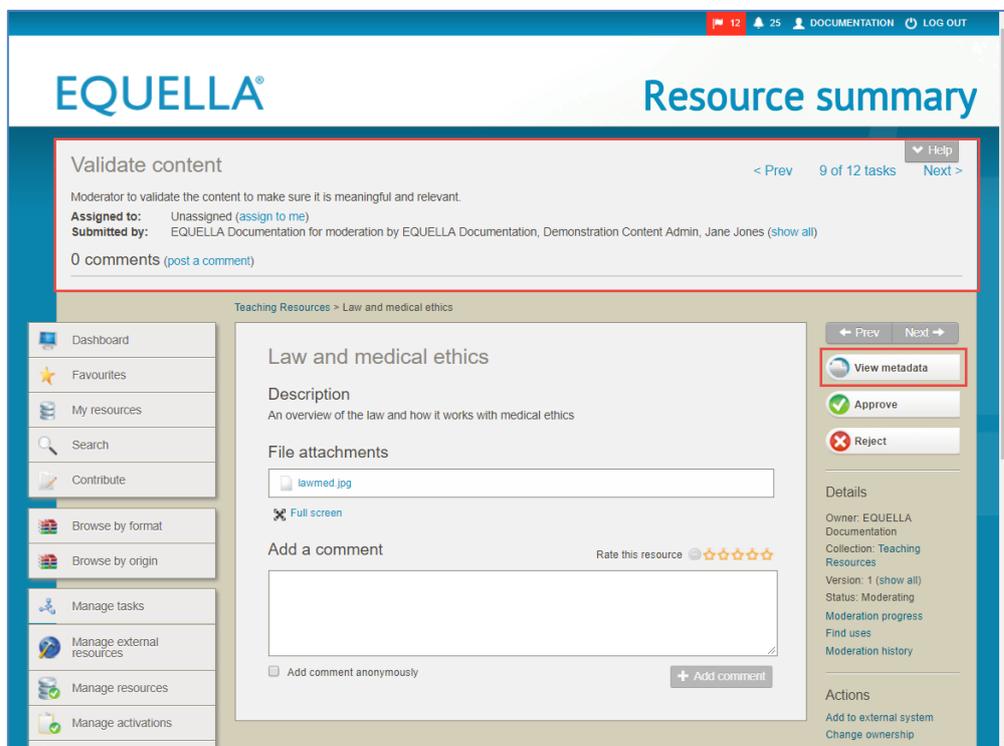


Figure 15 Resource summary page with task moderation section

To change the view to the contribution wizard page where the task moderation section is also displayed, click the  button.

To moderate from the contribution wizard page

1. From the **My tasks** page, click the  button for the relevant task. The contribution wizard page opens with the task moderation panel displayed above the contribution page. An example is shown in Figure 16.

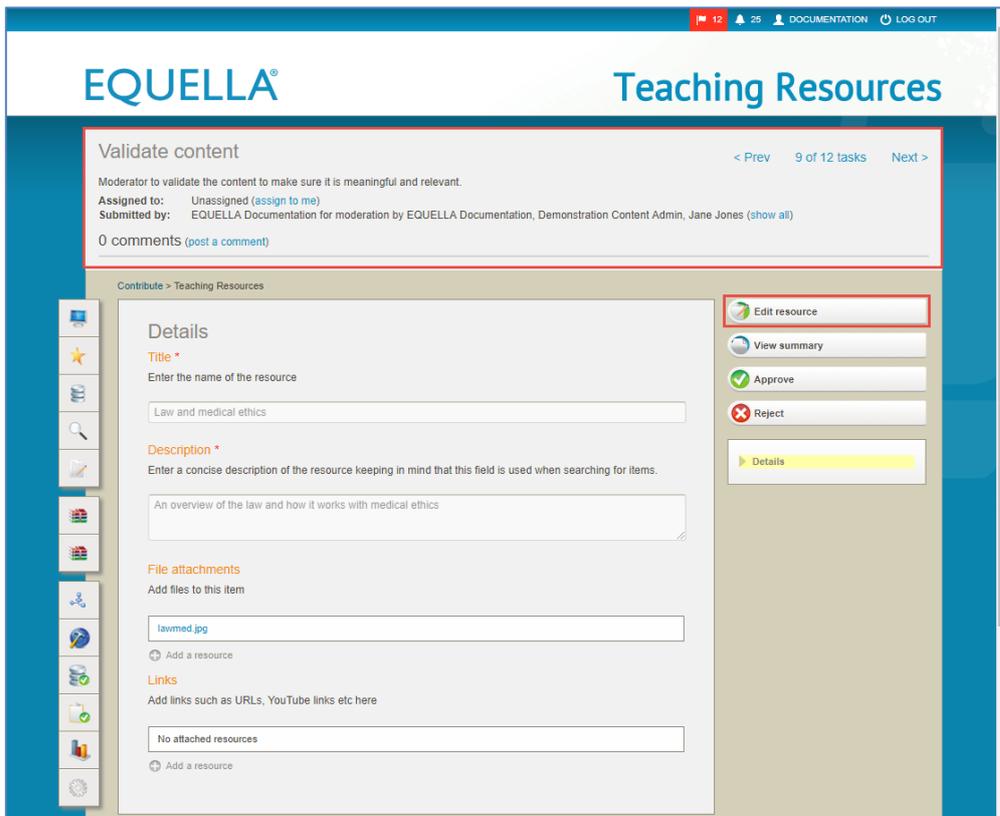
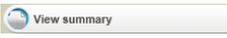


Figure 16 Contribution wizard page with task moderation panel

If required, click  to edit the contribution wizard fields.

Click  to display the resource summary screen with the task moderation section displayed at the top.

Task moderation panel

The task moderation panel displays information about the task. It also allows users to assign tasks to themselves, cancel assignments, view and post moderation comments and move between tasks. An example is shown in Figure 17.



Figure 17 Task moderation section

The task moderation section is made up of the following elements:

- Task name and description
- [< Prev](#) [9 of 11 tasks](#) [Next >](#) —use the **<Prev** and **Next>** links to move through tasks, or click **x of y tasks** link to return to the task list.
- **Assigned to**—see [Assigning tasks](#) on page 20.
- **Submitted by**—shows the owner of the resource and the moderators allocated for this task.
- **(x) comments (post a comment)**—see [Moderation comments](#) on page 20.
- **Comment display box with scroll bar** – displays moderation comments (pink background for rejection comments, green background for approval comments and white background for comments added using the *post a comment* link from the moderation task panel.

Assigning tasks

If there is a group of moderators selected for a task, of which only one is required to complete the task, a moderator could assign themselves the task. Assigning the task informs the other moderators that someone has already taken ownership of the task.

To assign a task

1. Click the **assign to me** link in the task moderation section. An example is shown in Figure 18.

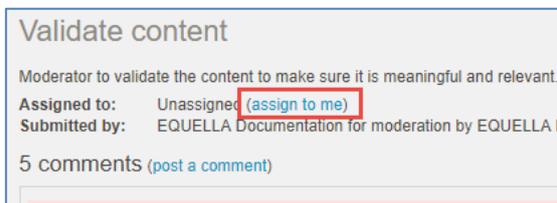


Figure 18 Assign to me link

The **Assigned to** field changes to *Me*, and the link changes to *cancel assignment*. An example is shown in Figure 19.



Figure 19 Assigned task

Select the **cancel assignment** link to change the status back to *unassigned*.

Moderation comments and files

Comments, which can be read by other moderators, can be added to a task. Additionally, files that are relevant to the moderation process can also be uploaded and viewed by other moderators. These

files can be viewed only within the moderation process, and can't be accessed once a resource has completed the workflow cycle.

Comments and files can also be added when Approving or Rejecting tasks. This is a great way to share information.

Comments and files can be viewed in the Comments display box in the Moderation panel. Comments added when a task is rejected are shown with a pink background, those added when a task is approved are shown with a green background and those added from the Moderation panel *post a comment* function have a white background. Use the scroll bar to move through all comments.

To post a moderation comment (and upload moderation file/s)

1. Select the **post a comment** link in the task moderation section. The **Post a comment** dialog displays. An example is shown in Figure 20.

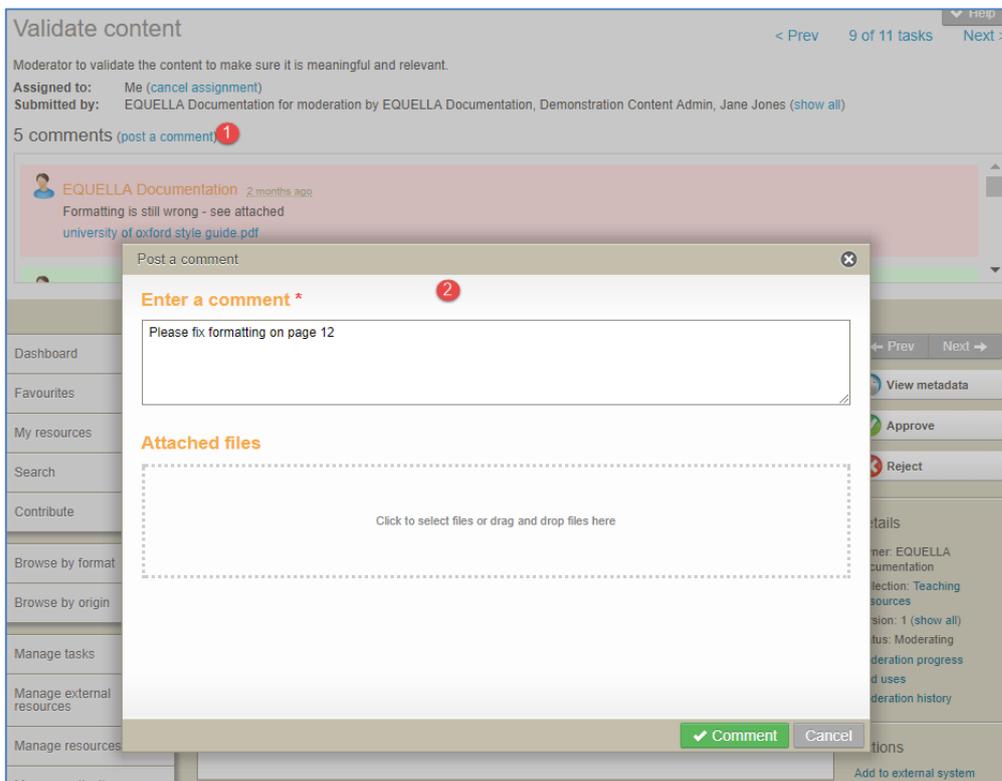


Figure 20 Task comments page—post a comment

2. Type the required text in the **Enter your comment** text box (mandatory).
3. Drag and drop or click in the Attached files box to upload one or more files relevant to the workflow process.
4. Click . The comment (and a link to uploaded file/s) display in the Comments display box. An example is shown in Figure 21.

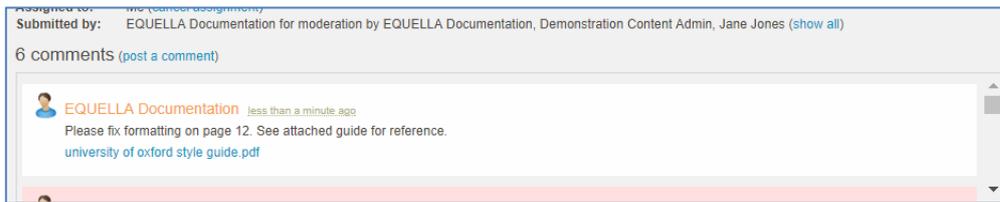


Figure 21 Comment display box displaying comment with file link

Rejecting a task

A task is rejected when the moderator decides changes need to be made before the resource moves on to the next step of the moderation workflow.

When a task is rejected, the moderator enters a mandatory moderation comment outlining the reasons for rejection, the resource goes back to the rejection point set in the workflow and a rejection notification is sent to the appropriate users. Depending on what step the resource is sent back to, a previous moderator may repeat an earlier workflow task or the owner of the resource may need to edit and redraft the resource to re-enter it into the workflow. See [Redrafting](#) on page 38 for more information.

To reject a task

1. Click  from either the Resource summary moderation view or the Contribution Wizard moderation view. An example from the Resource summary moderation view is shown in Figure 22.

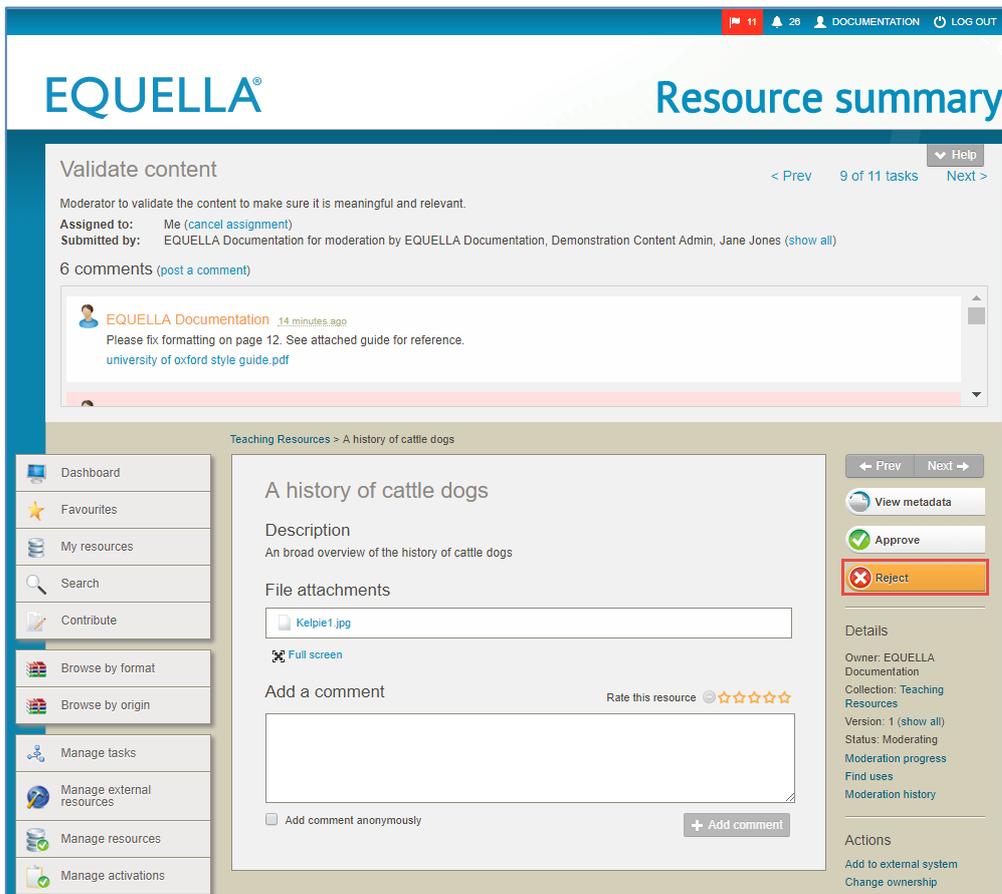


Figure 22 Reject button from the Resource summary moderation view

2. The **Reject** task dialog displays. An example is shown in Figure 23.

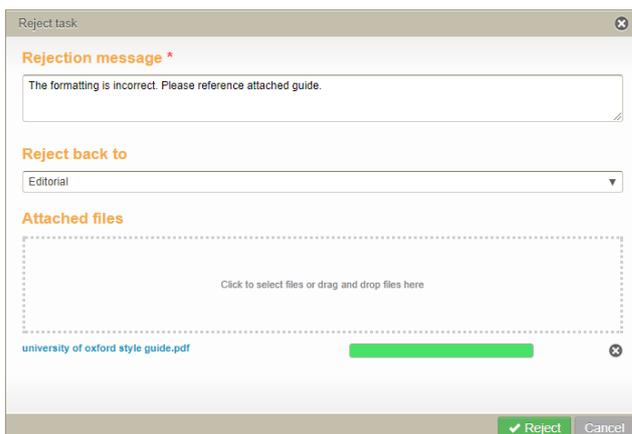


Figure 23 Reject task dialog

3. Type in the mandatory **Rejection message**, making sure the reason for the rejection is clear for the recipient.
4. Select the rejection point from the **Reject back to** drop-down. This field does not display unless there is more than one rejection point option.

5. Select (drag and drop or click in the box to select) any files relevant to the moderation process to be uploaded and stored with the comment.
6. Click **Reject**. The resource moves back to the selected rejection point and a confirmation displays. An example is shown in Figure 24.

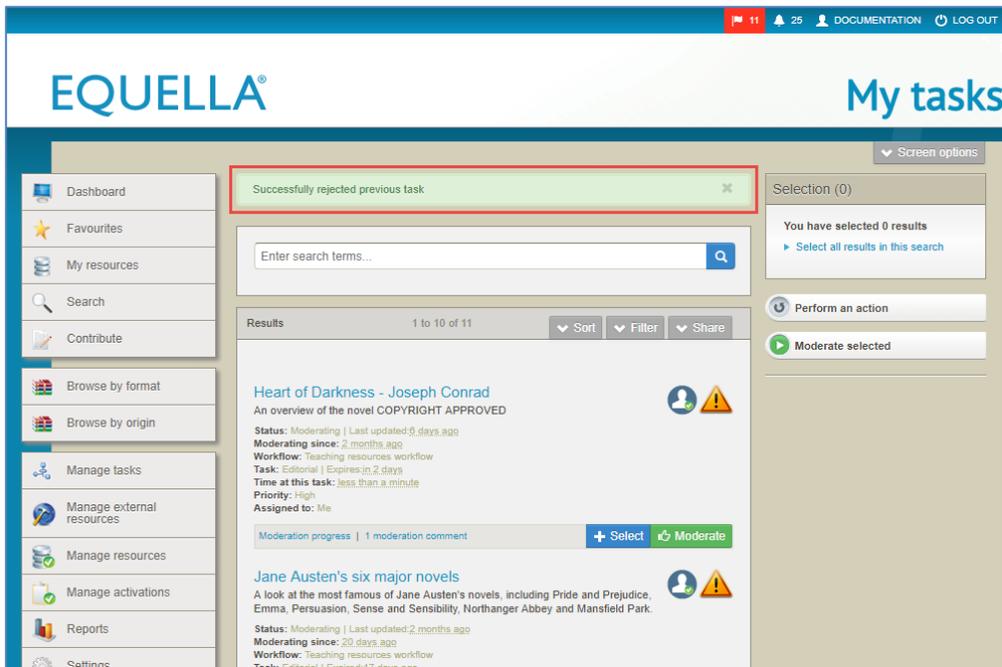


Figure 24 My tasks with rejection confirmation

Approving a task

A task is approved once the required moderator or moderators have completed the task and decide it is ready to move to the next stage of the moderation workflow.

To approve a task

1. Click **Approve** from either the Resource summary moderation view or the Contribution Wizard moderation view. An example from the Resource summary moderation view is shown in Figure 25

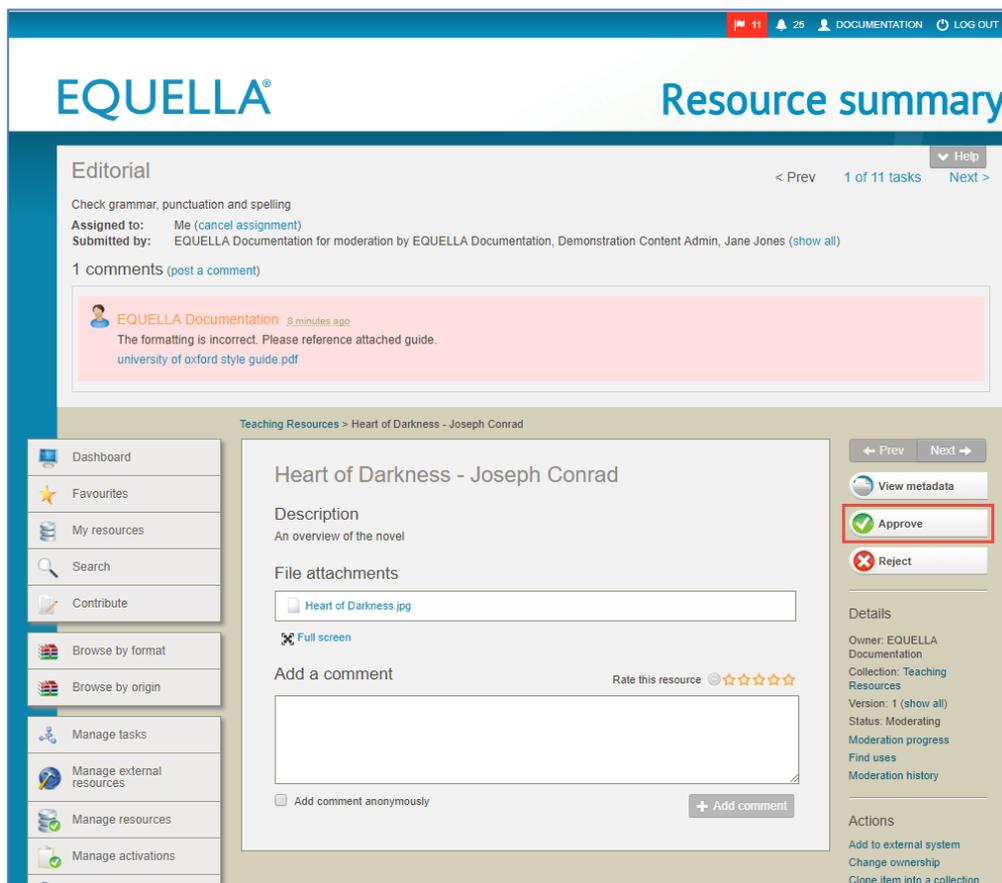


Figure 25 Approve button from the Resource summary moderation view

2. The **Approve** task dialog displays. An example is shown in Figure 26.

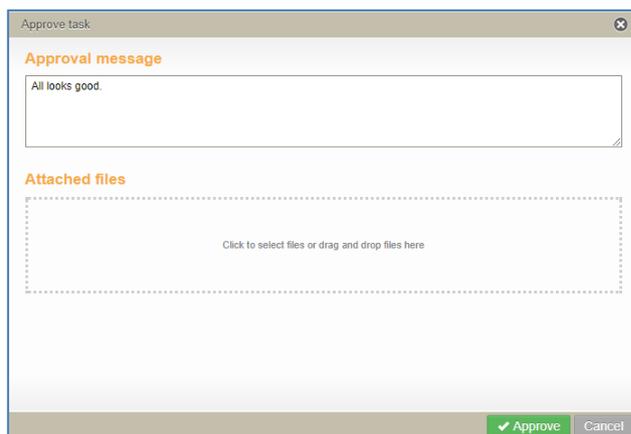


Figure 26 Approve task dialog

3. Type in an optional **Approval message** if desired.
4. Select (drag and drop or click in the box to select) any files relevant to the moderation process to be uploaded and stored with the comment.

NOTE: If one or more files are uploaded, the Approval message becomes mandatory.

5. Click **Approve**. The resource moves to the next task in the workflow (or out of workflow if last task) and a confirmation displays. An example is shown in Figure 27.

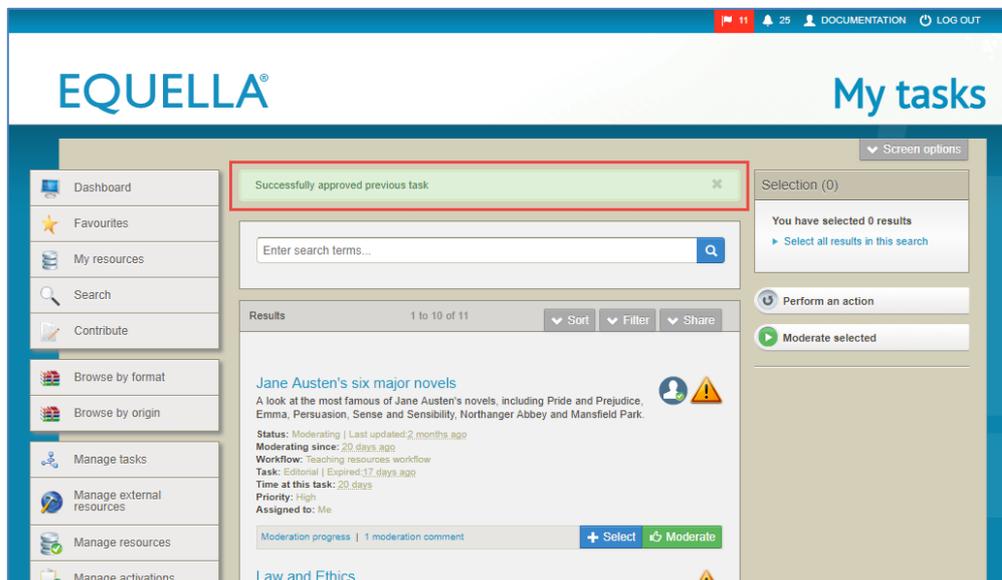


Figure 27 My tasks with approval confirmation

Sequential task processing

Sequential task processing allows moderators to select the tasks they wish to moderate, then move through and moderate them sequentially without returning to the My tasks page.

To moderate tasks sequentially

1. From the **My tasks** page, select the tasks to be moderated, then select **Moderate selected**. An example is shown in Figure 28.

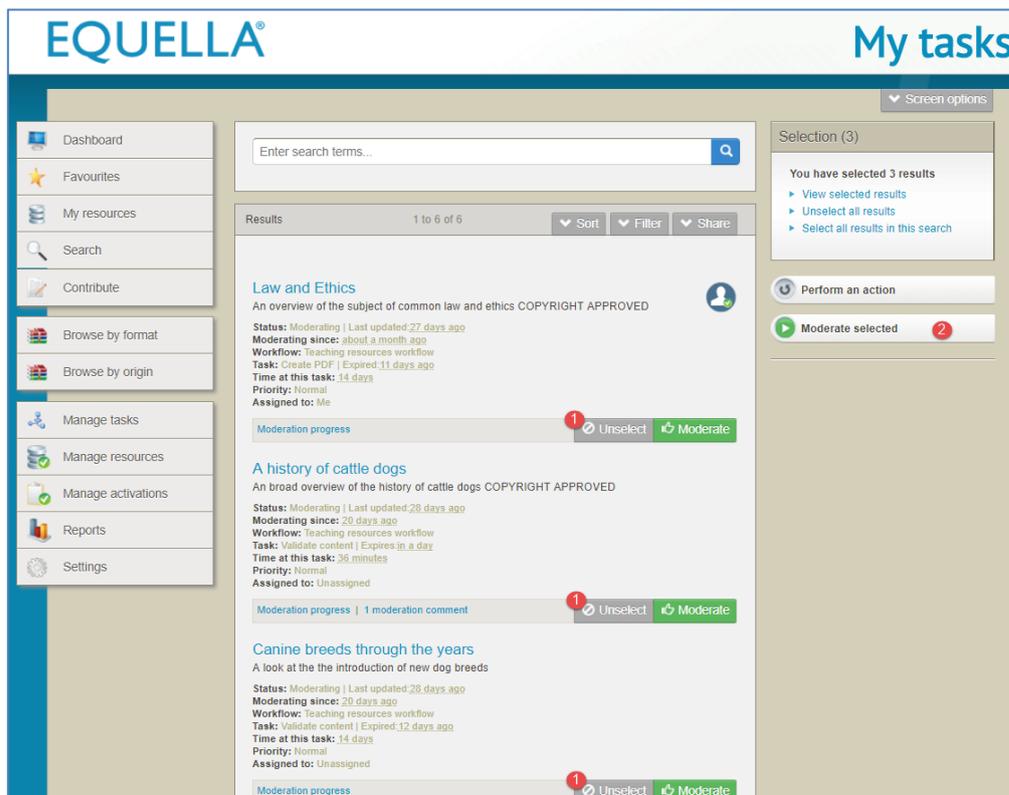


Figure 28 My tasks - Moderate selected

The **Moderation** page for the first task selected displays.

2. **Approve** or **Reject** the task to move to the Moderation page of the next task, and repeat the process until all the selected tasks are moderated. Once completed the My tasks page displays.

Bulk approval or rejection of tasks

The following privileges must be granted to the moderator by an administrator before the bulk action options display in the Bulk actions dialog:

- **APPROVE_BULK_TASKS** – allows granted users to approve multiple tasks in one action.
- **REJECT_BULK_TASKS** – allows granted users to reject multiple tasks in one action.

Approving or rejecting a selection of tasks

Multiple tasks can be selected then approved or rejected in one action. A single moderation comment can be recorded and will be stored in the moderation history for each task moderated in the bulk action.

To approve or reject a selection of tasks

1. From the **My tasks** page, select the tasks to be approved or rejected.

- From the right-hand panel, select the **Perform an action** button. An example is shown in Figure 29.

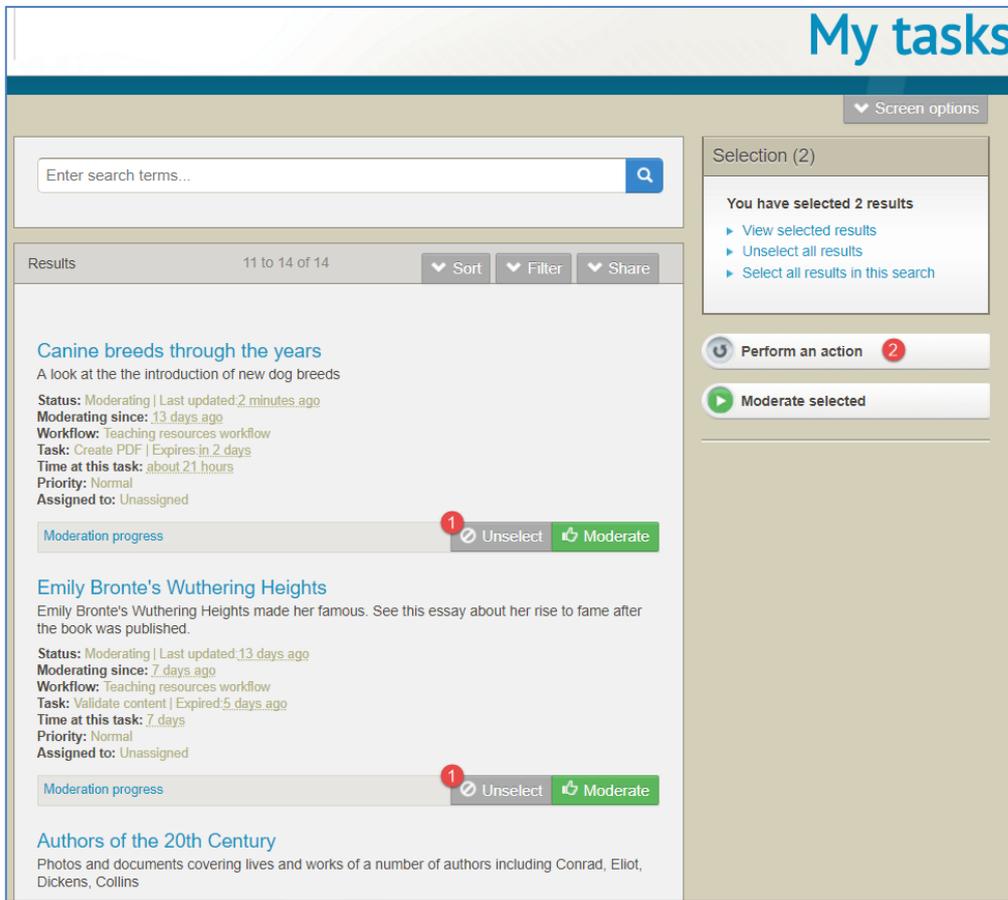


Figure 29 My tasks - Perform an action

The **Bulk actions** dialog displays. An example is shown in Figure 30.

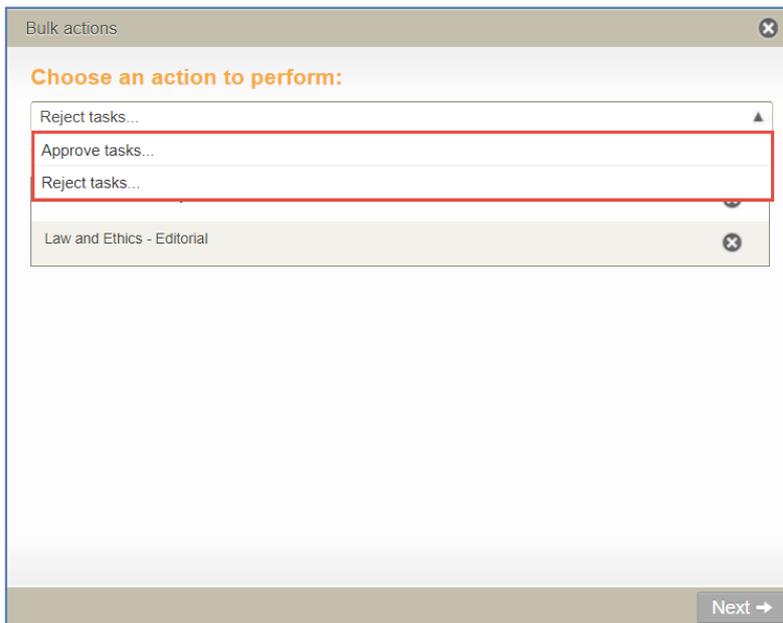


Figure 30 My tasks - Bulk actions dialog

3. Select **Approve tasks** or **Reject tasks** from the Bulk actions dropdown and click **Next**.
4. **Enter an optional approval message** or **Enter your rejection message** (mandatory) in the dialog's text box, noting that this message will appear in the moderation history for each selected task. An example with an approval message is shown in Figure 31.

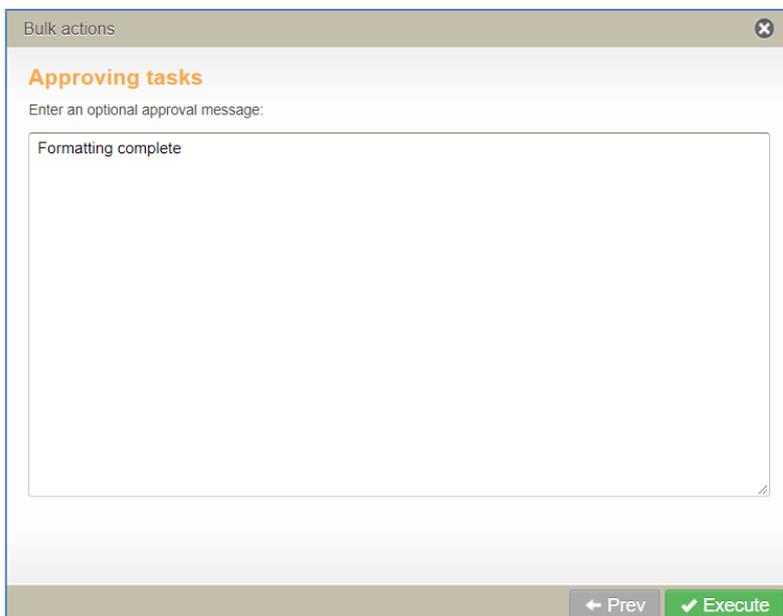


Figure 31 My tasks Bulk actions - Approving tasks comment text box

5. Click **Execute** then **OK** to confirm. The selected tasks move to the next task in the workflow if approved, or move to the relevant rejection point if rejected.

The **Bulk actions** dialog confirms the selected tasks have been successfully processed. An example is shown in Figure 32.

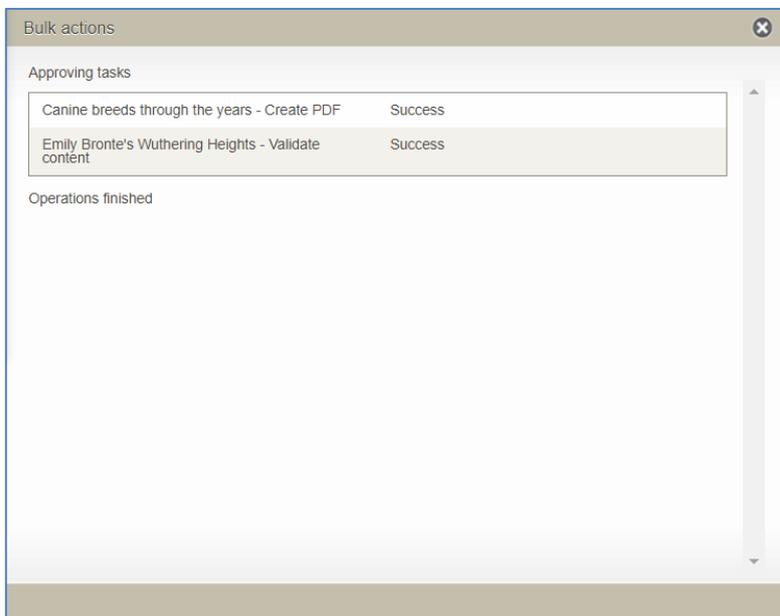


Figure 32 Bulk actions confirmation dialog

Notifications

Notifications are messages used to notify users of an event. These messages are related to a moderation workflow, for example, when a moderation task becomes overdue, or is rejected. Notifications can also be sent when a resource becomes 'Live', which lets the user know that the resource is now available for use.

Rejection notifications are immediate, and can be viewed within minutes of the resource being rejected, whereas other types of notifications are processed as a timed event (for example, overnight), so will not display until after that timed event has run.

There are a number of ways that users can choose to be alerted to notifications. Emails can be sent, RSS and ATOM feeds can be set up as well as the viewing the Notifications page.

Notifications page

The **Notifications** icon displays in the top right hand corner of the page, between the Tasks icon and the Username. The Notifications icon displays as a bell with a number beside it, the number indicating how many notifications are available. An example is shown in Figure 33.

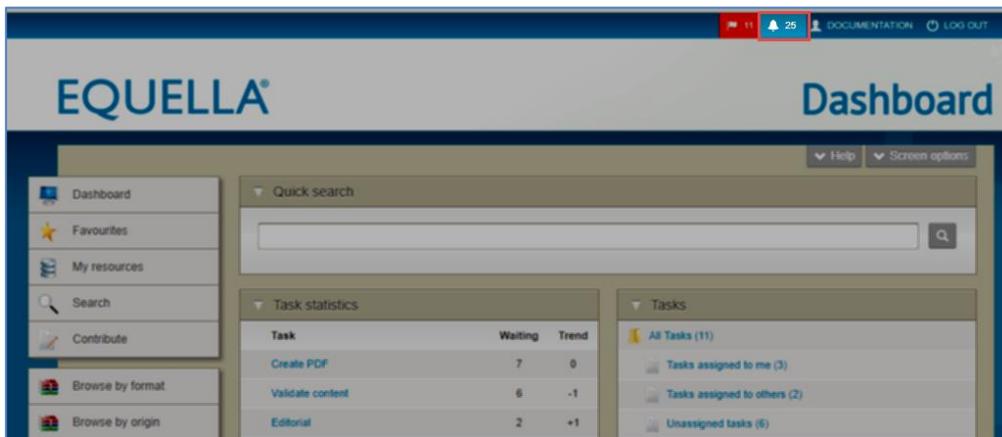


Figure 33 Notifications icon

Click the **Notifications** icon to display the **Notifications** page. An example is shown in Figure 34.

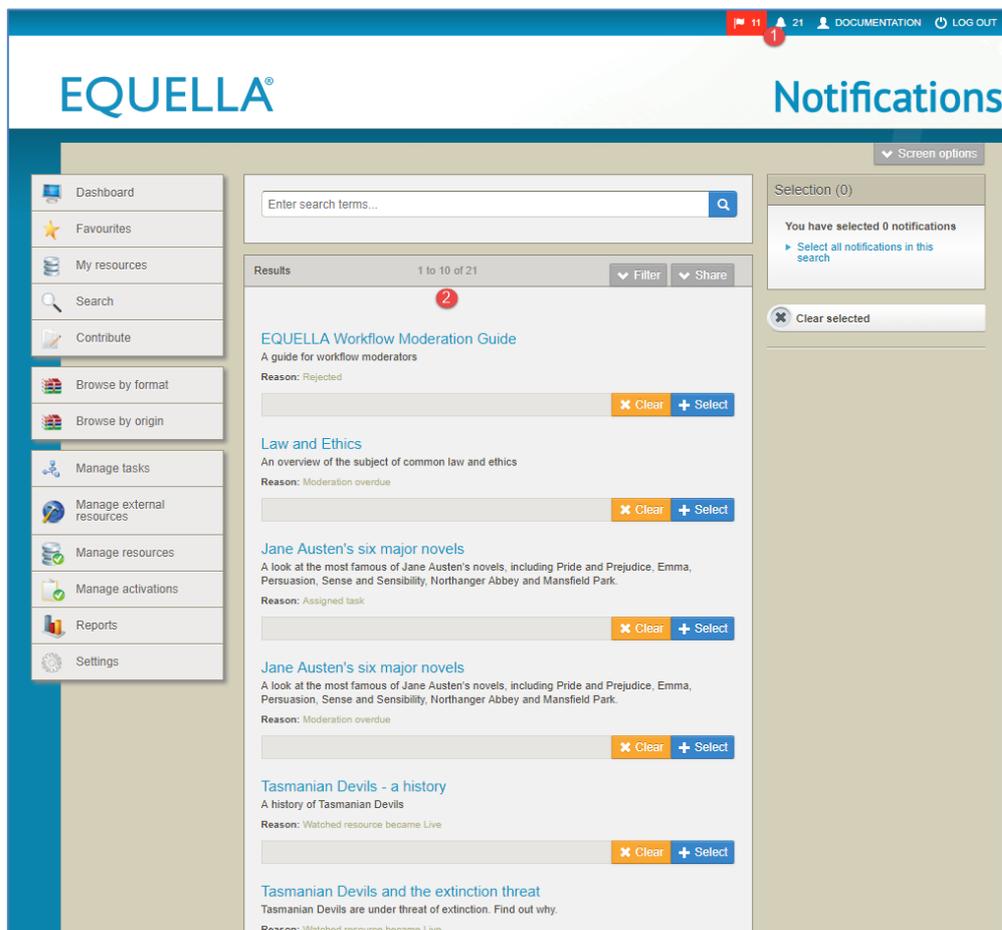


Figure 34 Notifications page

The Notifications page elements are:

- **Resource title**—click the resource title to open the Resource summary page.
- **Resource description**
- **Reason**—brief explanation of the reason for the notification. Reasons can be:
 - **Moderation overdue**—the moderate by date for the current task has passed. These notifications are automatically cleared once the overdue task is moderated.
 - **Contains bad URL**—the resource contains a URL attachment that has an invalid web address. These notifications are automatically cleared once all bad URL attachments for a resource have been corrected.
 - **Script task failed** – a script task the resource has reached in the workflow has not run successfully. Only nominated administrators receive these notifications. These notifications are automatically cleared once the script error has been corrected.
 - **Script task executed successfully** – a script task the resource has reached in the workflow has run successfully. Only nominated administrators receive these notifications.
 - **Assigned task** – a task has been assigned specifically to the logged in user.

- **Was rejected**—the resource has been rejected during a moderation step. The resource is usually updated by the relevant user, then the *'Redraft this version'* action is used to enter it back into the workflow. These notifications are automatically cleared once the associated resources have been redrafted.
 - **Notified of resource becoming Live by owner**—a resource that has become available (*Live*) where the owner of the resource selected the logged-in user to be notified using the *Share with others* function. These notifications are cleared manually by clicking .
 - **Watched resource became LIVE**—a resource belonging to a 'watched' collection selected for notifications has become available (*Live*). See [New resource notifications](#) on page 37. These notifications are cleared manually by clicking .
 - **My resource became Live** – a resource where the logged in user is the owner has become 'Live'. See [My resource notifications](#) on page 38.
-  - click to remove the notification.
 -  - click to select the item.
 - **Selection box** - shows the number of notifications currently selected in brackets, and the following links:
 - **View selected notifications** – click this link to display only selected notifications
 - **Unselect all notifications** – unselects any notifications currently selected
 - **Select all notifications in this search** – selects all notifications in the current search results.

An example of the Selection box is shown in Figure 35.

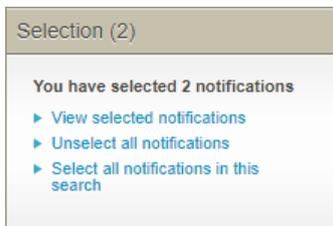
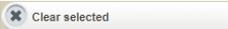


Figure 35 Notifications - Selection box

-  - click to remove selected notifications.

Filter

The **Filter** tab on the **Notifications** page displays options relevant to notifications.

An example of the **Filter** tab is shown in Figure 36.

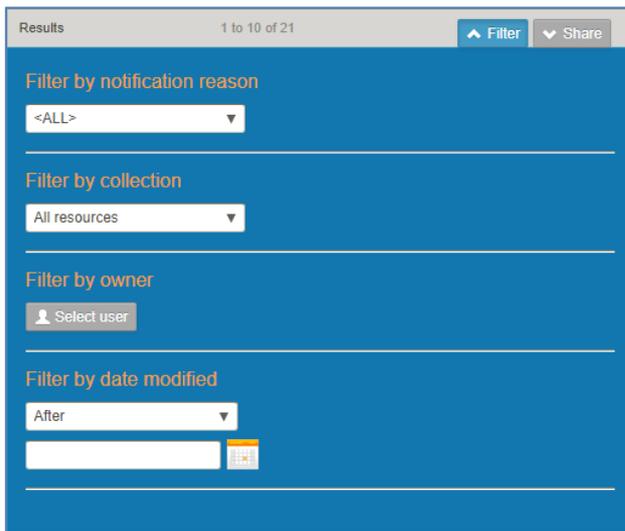


Figure 36 Notifications filter box

From the notifications results pages, the following filter options are available:

- **Filter by notification reason**—select a value from the drop-down list. Available options are *<ALL>*, *Moderation overdue*, *Contains bad URL*, *Script task failed*, *Script task successfully executed*, *Assigned task*, *Was rejected*, *Notified of resource becoming Live by owner*, *Watched resource became LIVE* and *My resource became Live*.
- **Filter by collection**—select the required collection from the drop-down list to see only resources belonging to that collection.
- **Filter by owner**—click  to display the **Select owner to filter by dialog** and search for and select the required owner.
- **Filter by date modified**—select a qualifier from the drop-down list (*After*, *Before*, *Between* or *On*), then click the calendar field or icon to display a calendar control.

Tasks portlet

The **Tasks** portlet on the Dashboard page also shows the user the number of notifications, broken down by type. An example is shown in Figure 37.



Figure 37 Tasks portlet—notifications

Each item in the notifications portlet is a link. In the notifications section of the portlet, selecting any link takes the user to the **Notifications** page, with the relevant tasks displayed. See [Notifications page](#) on page 31 for more information.

Selecting the following notification links opens the Notifications page and displays:

- **All notifications**—all notifications.
- **Resources gone Live (notified by owner)**—all resources where the owner has used the **Share with others** function to set a notification to alert the logged-in user when the resource becomes available (*Live*). These resources have a ‘reason’ of *Notified of resource becoming Live by owner*’ on the notifications results page.
- **Resources gone Live (watching)** - resources that have recently become available (*Live*) that belong in a collection where notifications have been set up via the **Edit User** function. (See [New resource notifications](#) on page 37.) These resources have a ‘reason’ of *Watched resource became Live*’ on the notifications results page.
- **Resources gone Live (owned by me)** - resources that have recently become available (*Live*) where the logged in user is the owner.
- **Resources that were rejected**—resources that have been rejected during moderation. These resources have a ‘reason’ of *Was rejected*’ on the notifications results page.
- **Resources that contain bad URLs**—resources that contain a URL that is not valid. These resources have a ‘reason’ of *Contains bad URL*’ on the notifications results page.

- **Resources that are overdue to be moderated**—resources with tasks that have passed their completed by date. These resources have a ‘reason’ of *‘Moderation overdue’* on the notifications results page.
- **Resources that contain script errors** – resources where the script task they have reached in the workflow has not executed successfully. These resources have a ‘reason’ of *‘Script task failed’*.
- **Resources that have scripts executed** – resources where the script task they have reached in the workflow has executed successfully. These resources have a ‘reason’ of *‘Script task successfully executed’*.

Notification configuration

Notifications can be configured via the **Edit user** page accessed from the username button at the top of any EQUELLA page. An example is shown in Figure 38.

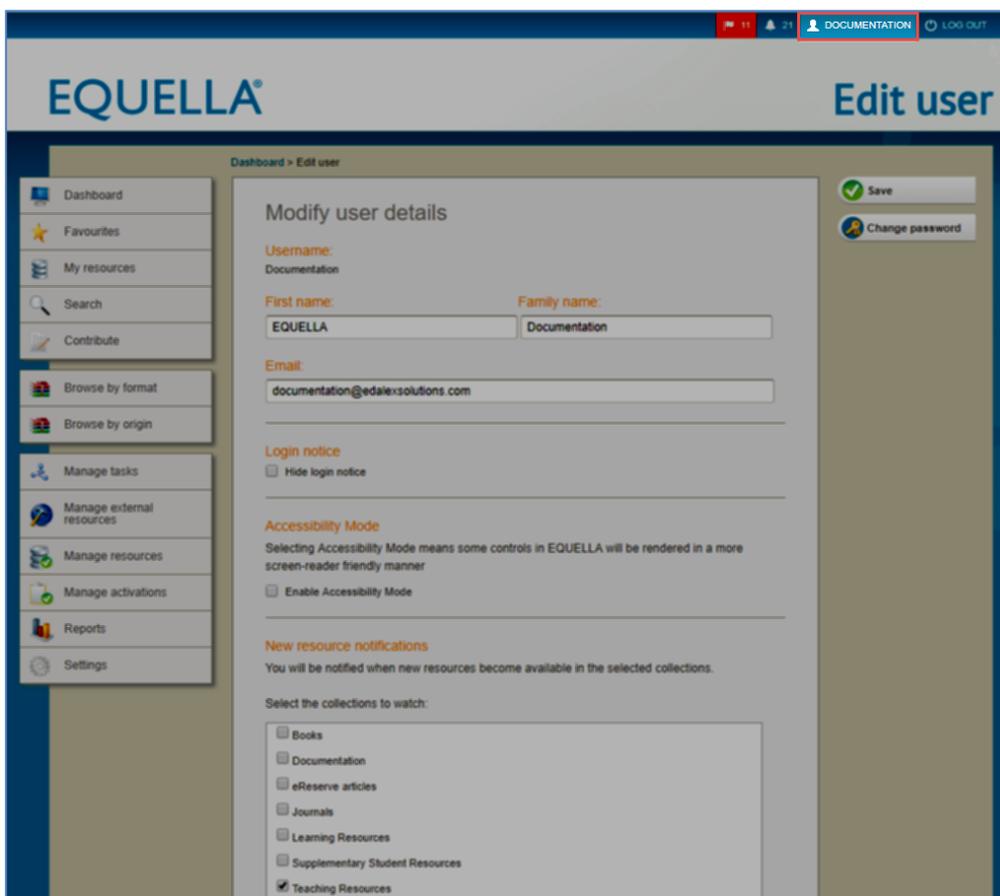


Figure 38 Username icon to open Edit user page

There are three sections on the Edit user page for configuration of EQUELLA notifications:

New resource notifications

This section enables a user to select collections to ‘watch’. The user is notified of any new resources that become available (Live) in the selected collections. An example is shown in Figure 39.

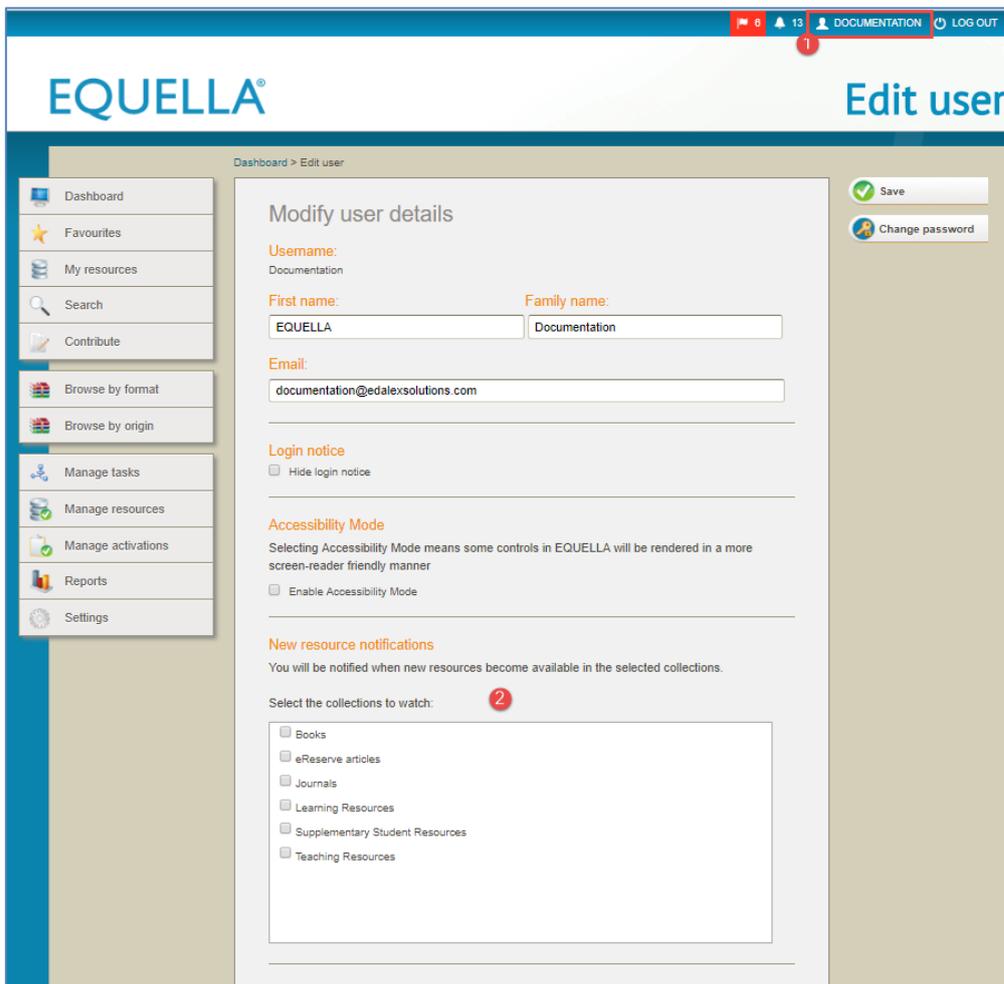


Figure 39 Edit user page - New resource notifications

Workflow email notifications

This section allows the user to unsubscribe from receiving workflow task-specific email notifications. Workflow task notifications are emailed by default, but the user can uncheck the collections from which they do not wish to receive workflow task email notifications.

NOTE: Email notifications are always sent for rejected tasks regardless of configuration.

An example is shown in Figure 40.

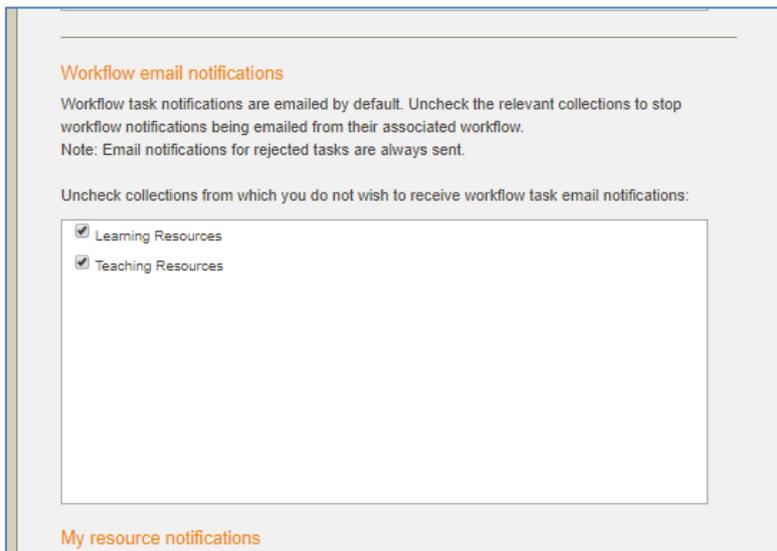


Figure 40 Edit user - Workflow email notifications

Regardless of email notification configuration, internal notifications are always found on the **Notifications** page (see [Notifications page](#) on page 31).

My resource notifications

The user can check this box if they wish to receive notifications that resources they own have become 'live'. An example is shown in Figure 41.

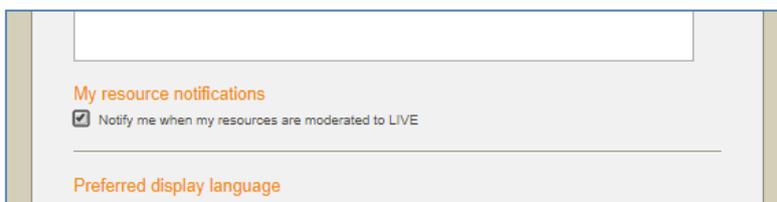


Figure 41 My resource notifications

Redrafting

This action is intended for resources that require redrafting (editing), usually after being rejected and prior to moderation workflow completion. Selecting this operation allows the resource to be edited and re-submitted for moderation or saved as a draft.

To access the Redraft this version function

1. From the *Actions* section of Resource summary page, select **Redraft this version**. An example is shown in Figure 42.

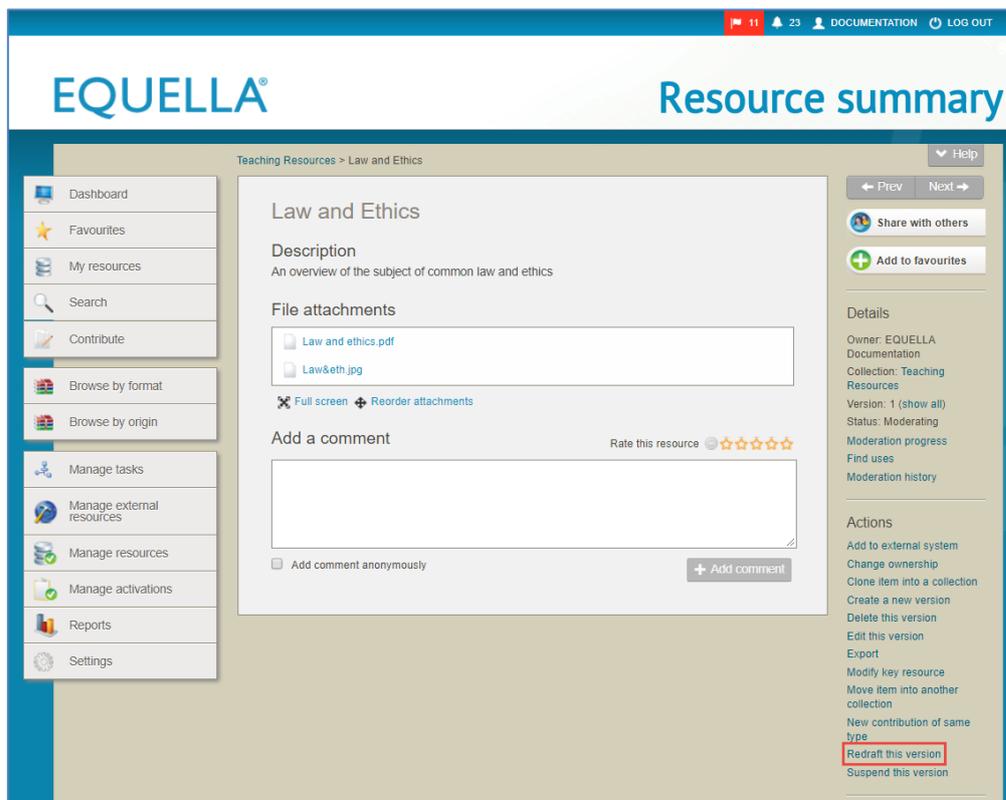


Figure 42 Resource summary page - Redraft this version

The Editing page displays.

2. Edit the resource, then click . The Save dialog displays. An example is shown in Figure 43.

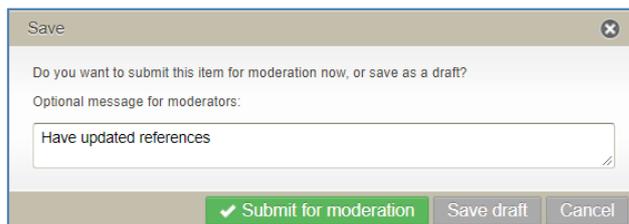


Figure 43 Save dialog with message

3. Enter a message if desired, then click .

The resource re-enters the workflow at the appropriate moderation task.

Manage tasks

There may be many resources at various stages of a workflow at any one time within the EQUELLA system, and the Manage tasks function and Task statistics portlet allow administrators to view the progress of these resources through the workflow. Information, such as moderator details, length of time at a particular task and at what point in the workflow resources are getting held up, can be easily detected using these functions.

Manage tasks privilege

The privilege associated with access to the Manage task function is **MANAGE_WORKFLOW**. Granting this privilege to a user, group or role will display the Manage tasks menu item in the left-hand navigation bar. Users granted the **MANAGE_WORKFLOW** privilege will also be able to access the *Assign/Reassign* task bulk action available from the Manage tasks page.

Manage tasks page

The **Manage tasks** page displays all workflow tasks. Content and system administrators would typically be granted privileges to access this function to view moderation progress. An example is shown in Figure 44.

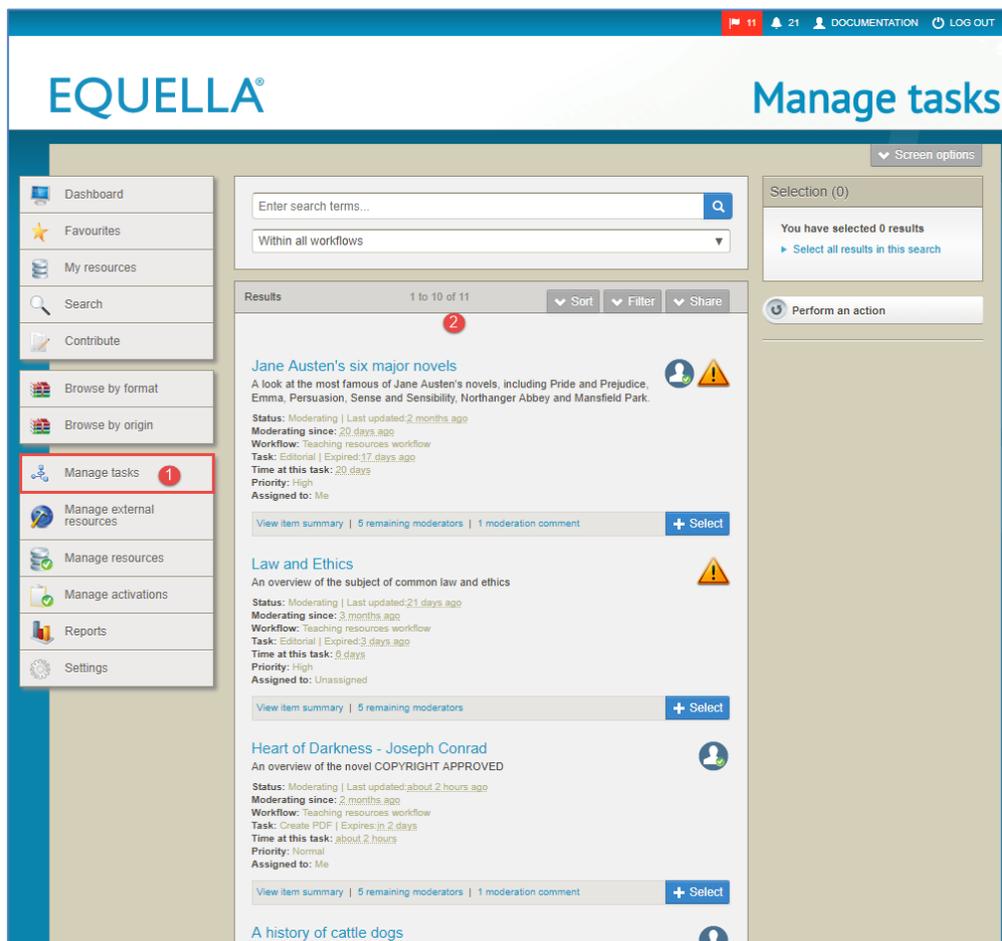


Figure 44 Manage tasks page

The tasks on the **Manage tasks** page are displayed in the following default order:

- **Priority** (High, Normal then Low), then
- **Assignment** (Me, Unassigned then assigned to another user), then
- **Time at this task.**

Tasks where the priority is set to **High** display with an  icon.

Tasks assigned specifically to the logged in user display with an  icon.

The **Manage tasks** page elements are:

- **Within all workflows** drop-down – allows a specific workflow to be selected. An example is shown in Figure 45.

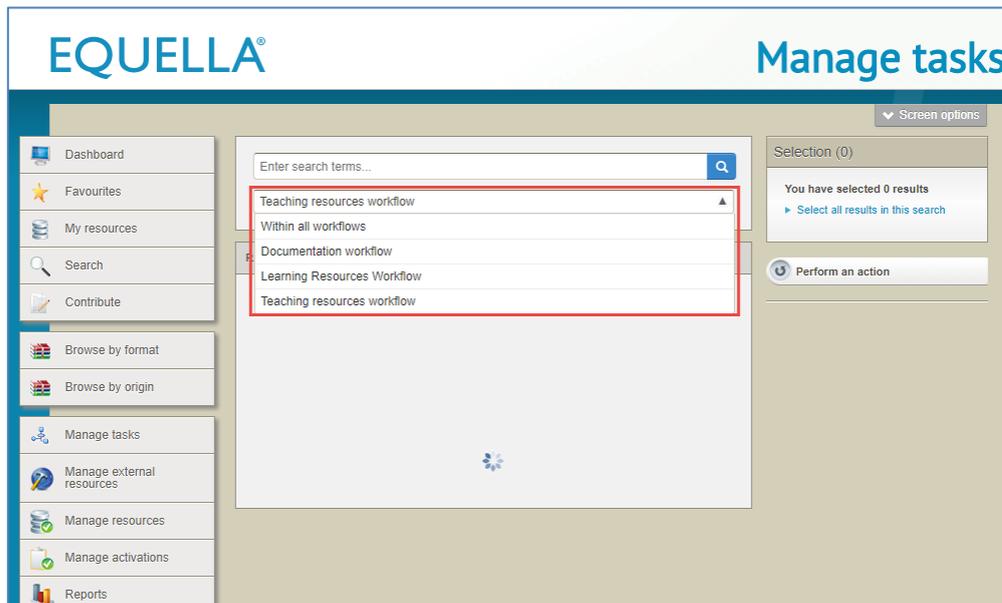


Figure 45 Within all workflows drop-down

- **Resource title**—click on the resource title to open the *Moderation progress* page (see [Moderation progress](#) on page 7).
- **Resource description**
- **Status**—will always be *moderating*, *live* (live items can still be in a workflow) or *review*.
- **Last updated**—time since the resource was last updated (edited). Hover over this value to display the exact date and time details.
- **Moderating since**—time since resource entered the workflow. Hover over this value to display the exact date and time details.
- **Workflow** – name of the associated workflow.
- **Task**—the name of the current workflow task.
- **Expires / Expired**—number of days before or since task expiry date.
- **Time at this task**—time since resource arrived at this workflow task. Hover over this value to display the exact date and time details.
- **Priority**—the priority of the task (can be *LOW*, *NORMAL* or *HIGH*).
- **Assigned to** – name of assigned user. Values can be *Me* (logged in user), *Unassigned* or a specific user's name (e.g *Joe Bloggs*).
- **View item summary** – select to open *Resource summary* page.
- **(x) remaining moderators**—select to open the **Moderators** dialog, which lists moderators who have not yet completed the current task. An example is shown in Figure 46.



Figure 46 Moderators dialog

(NOTE: If multiple moderators are selected for a task, but only one needs to complete it, all the potential moderators display in the Moderators dialog, even if the task has been assigned to one of them.)

- **(x) moderation comment(s)** —select to open the **Moderation comments** dialog, which displays any existing moderation comments. An example is shown in Figure 47.

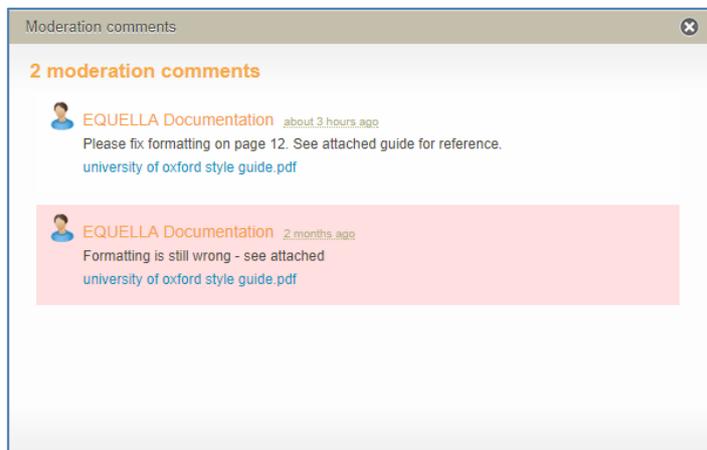


Figure 47 Moderation comments dialog

- **+ Select** —click to select the task for further actions.
- **Selection box** - shows the number of tasks currently selected in brackets, and the following links:
 - **View selected results** – click this link to display only selected tasks.
 - **Unselect all results** – unselects any tasks currently selected.
 - **Select all results in this search** – selects all tasks in the current search results.

An example of the Selection box is shown in Figure 48.



Figure 48 My tasks - Selection box

- **Perform an action** - click this button to select further actions for the selected tasks.

Sort and filter

Sort

The **Sort** options on the Manage tasks **Sort** tab display options relevant to tasks. An example of the **Sort** tab options are shown in Figure 13.

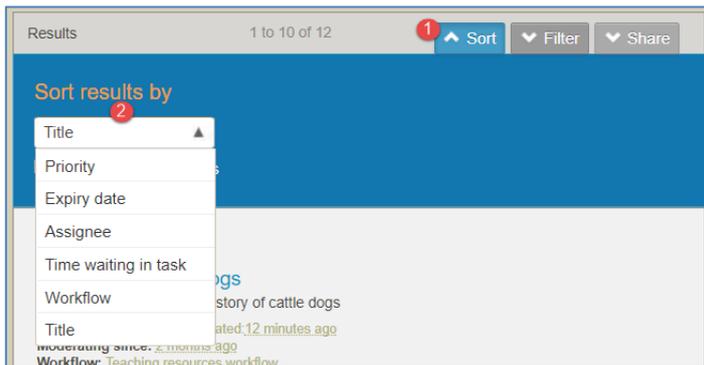


Figure 49 My tasks sort box

The sort options are:

- **Priority**—the priority of the resource’s current workflow task.
- **Expiry date**—the date set as the last day that the task can be performed.
- **Assignee** – assignment (*Me, Unassigned* and other users (e.g. *Joe Bloggs*)).
- **Time waiting in task**—time since resource arrived at current workflow task.
- **Workflow** – workflow name.
- **Title**—name of the resource.
- **Reverse order of results**—check to reverse the order in which the results display.

Filter

The **Filter** options on the Manage tasks **Filter** tab display options relevant to tasks. An example of the **Filter** tab is shown in Figure 50.

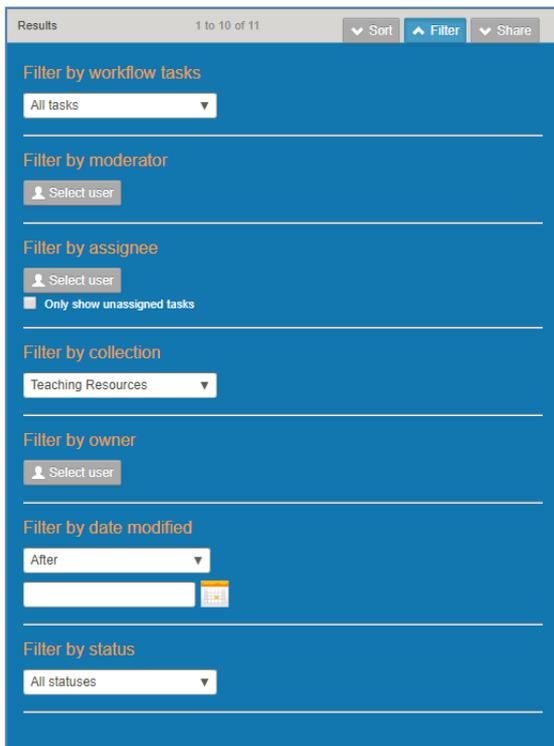


Figure 50 My tasks filter box

From the My tasks page, the following filter options are available:

- **Filter by workflow tasks** – select a workflow task to display only selected tasks. Note that this option displays only if a specific workflow has been selected from the *Within all workflows* drop-down in the search box at the top of the Manage tasks page.
- **Filter by moderator** – click  to display the **Select moderator to filter by** dialog and search for and select the required moderator. This will return any tasks where the selected user has been selected as a moderator for those tasks.
- **Filter by assignee** – click  to display the **Select moderator to filter by** dialog and search for and select the required moderator. This will return any tasks where the selected user has been specifically assigned those tasks.
- **Only show unassigned tasks** – select to show only tasks with no assignments.
- **Filter by collection**—select the required collection from the drop-down list to see only tasks related to resources belonging to that collection.
- **Filter by owner**—click  to display the **Select owner to filter by dialog** and search for and select the required owner.
- **Filter by date modified**—select a qualifier from the drop-down list (*After, Before, Between* or *On*), then click the calendar field or icon to display a calendar control.
- **Filter by status** – select to show only resources with the selected status. Available values are *Moderating, Live* and *Review*.

Bulk actions

Actions that can be applied to selected tasks from the Manage tasks page are:

- **Assign/Reassign tasks** – allows the task administrator to assign selected tasks to a specific moderator (e.g. subject expert) or reassign tasks which have already been assigned a specific moderator (e.g. if a moderator is away or leaves the institution).
- **Approve tasks** – allows the task administrator to approve the selected tasks in one action.
- **Reject tasks** – allows the task administrator to reject the selected tasks in one action.

In addition to the MANAGE_TASKS privilege, the following privileges must be granted to the task administrator by an administrator before the bulk action options display in the Manage tasks Bulk action dialog:

- **APPROVE_BULK_TASKS** – allows granted users to approve multiple tasks in one action.
- **REJECT_BULK_TASKS** – allows granted users to reject multiple tasks in one action.

Approving or rejecting a selection of tasks

Multiple tasks can be selected then approved or rejected in one action. A single moderation comment can be recorded and will be stored in the moderation history for each task moderated in the bulk action.

To approve or reject a selection of tasks

1. From the **My tasks** page, select the tasks to be approved or rejected.
2. From the right-hand panel, select the **Perform an action** button. An example is shown in Figure 51.

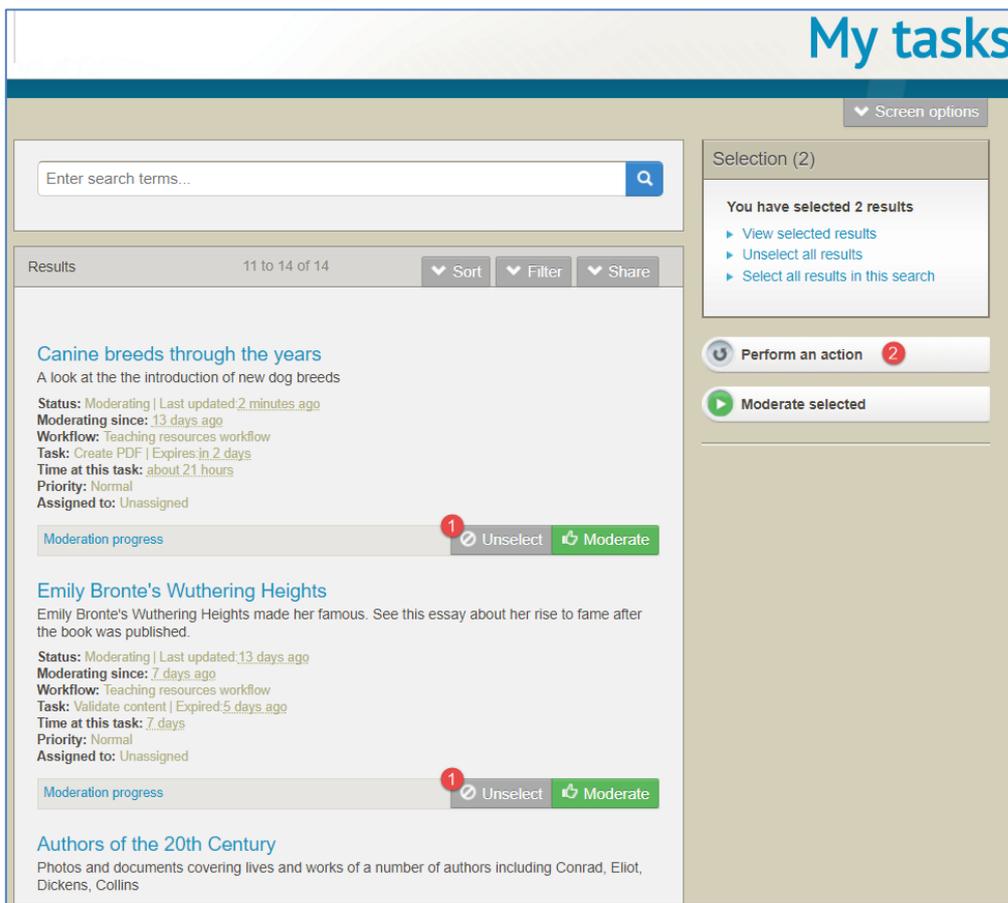


Figure 51 My tasks - Perform an action

The **Bulk actions** dialog displays. An example is shown in Figure 52.

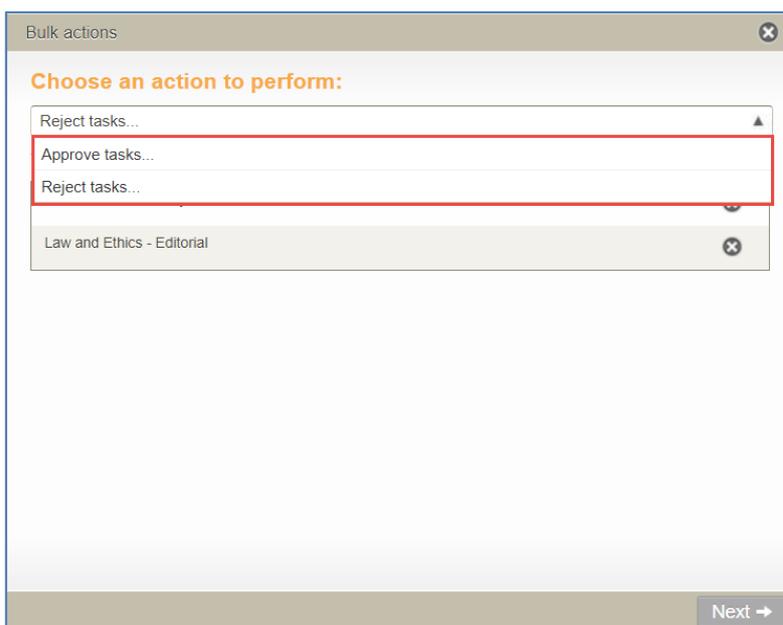


Figure 52 My tasks - Bulk actions dialog

3. Select **Approve tasks** or **Reject tasks** from the Bulk actions dropdown and click **Next**.
4. **Enter an optional approval message** or **Enter your rejection message** (mandatory) in the dialog's text box, noting that this message will appear in the moderation history for each selected task. An example with an approval message is shown in Figure 53.

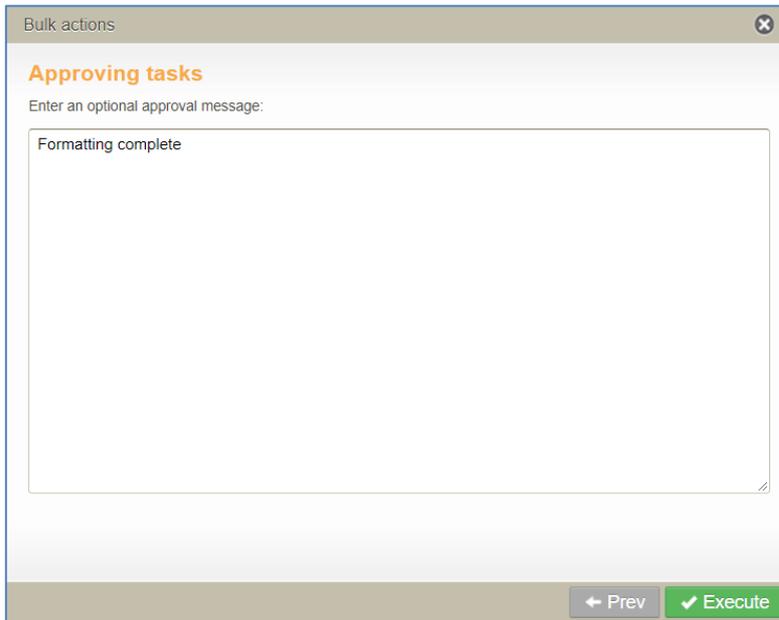


Figure 53 My tasks Bulk actions - Approving tasks comment text box

5. Click **Execute** then **OK** to confirm. The selected tasks move to the next task in the workflow if approved, or move to the relevant rejection point if rejected.

The **Bulk actions** dialog confirms the selected tasks have been successfully processed. An example is shown in Figure 54.

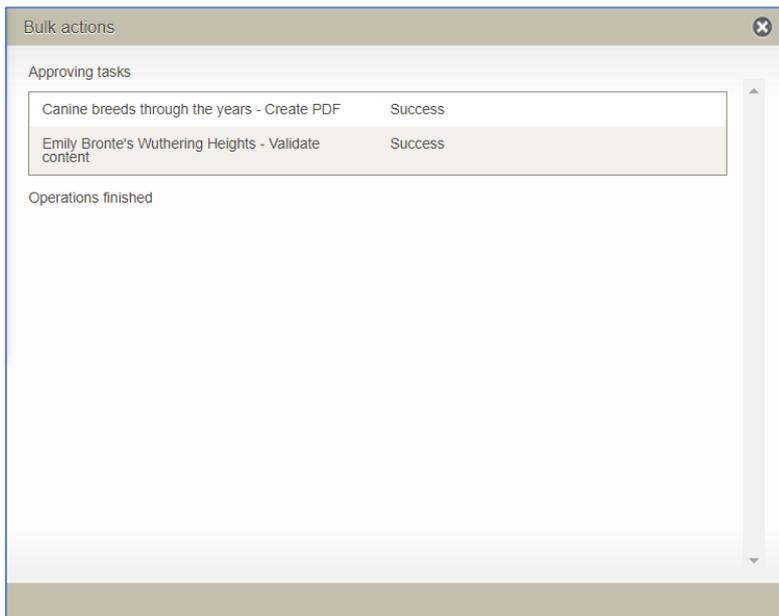


Figure 54 Bulk actions confirmation dialog

Assigning or reassigning a selection of tasks

All administrators who can access the **Manage tasks** page have access to a function enabling them to assign multiple tasks to a specific moderator. For example, one moderator in a group of moderators might have more experience in a specific area, so an administrator can assign tasks with material relating to that area to that moderator. Or a moderator assigned to a group of tasks may be absent, so an administrator can reassign those tasks to an alternative moderator.

NOTE: Only users who are allocated as moderators for a task on the Moderators tab in the Workflow Task Editor (in the Administration Console) can be assigned a task.

To assign or reassign tasks to a specific moderator

1. From the **Manage tasks** page, select the tasks to be assigned.
2. From the right-hand panel, select the **Perform an action** button. An example is shown in Figure 55.

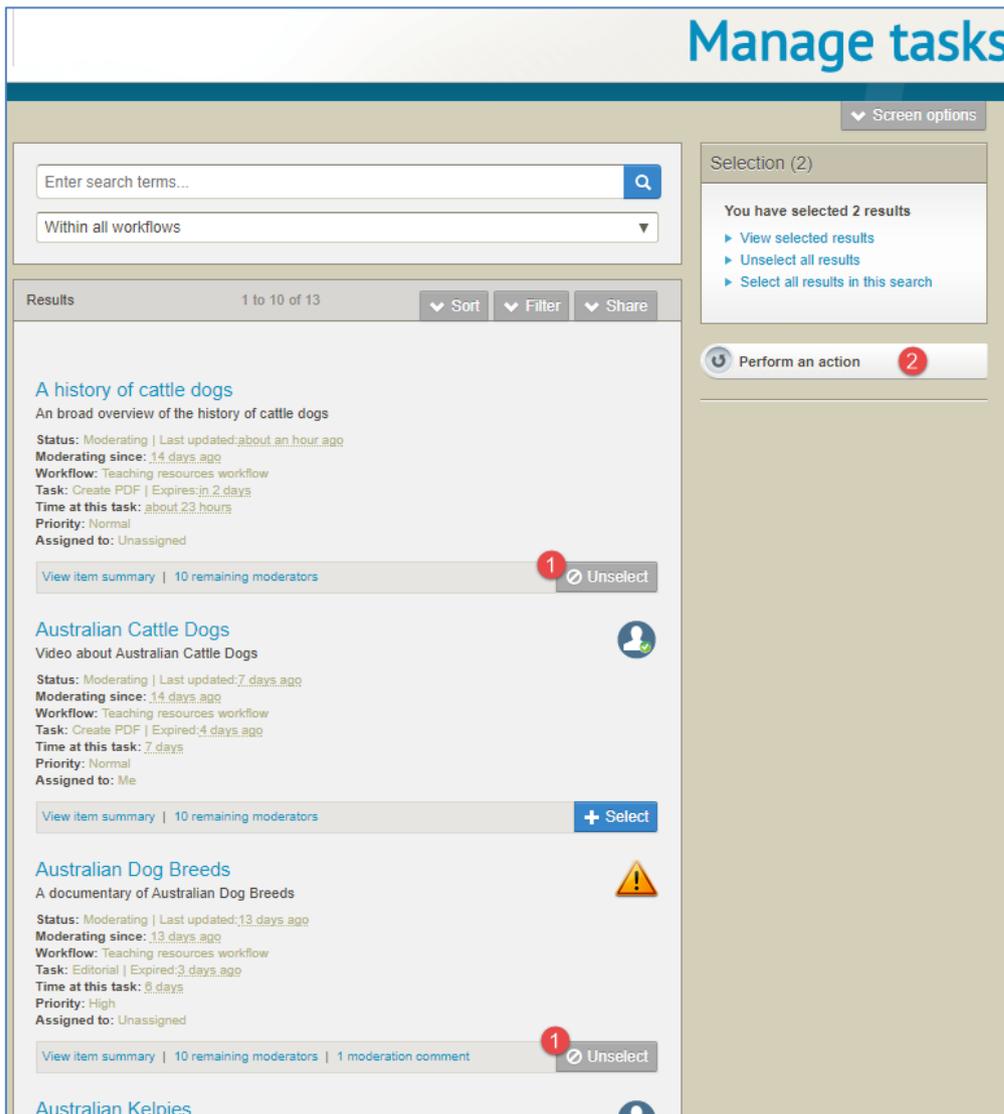


Figure 55 Manage tasks - Perform an action button

The **Bulk actions dialog** displays. An example is shown in Figure 56.

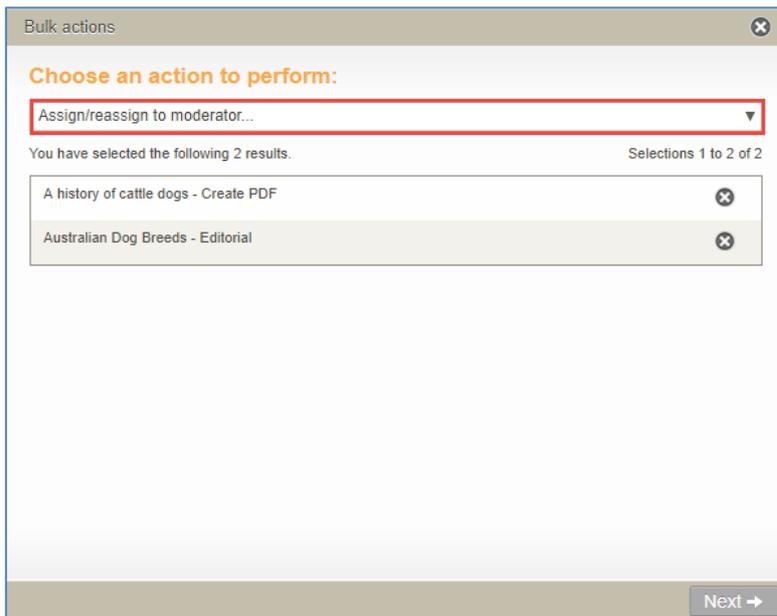


Figure 56 Manage tasks - Bulk actions dialog

3. Select **Assign/reassign to moderator** from the dropdown and click **Next**. The **Select assignee** dialog displays, as shown in Figure 57.

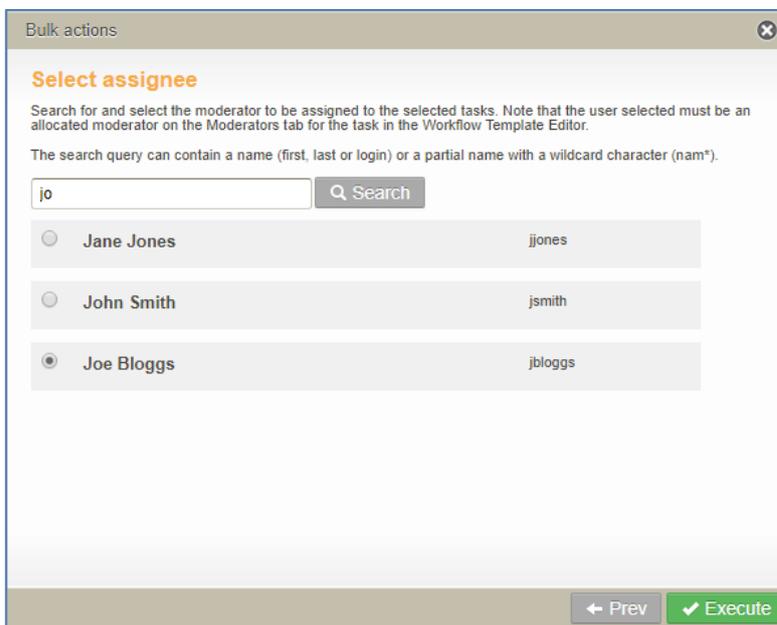


Figure 57 Manage tasks - Bulk actions - Select assignee dialog

4. Search for the required moderator, keeping in mind that the user selected must be an allocated moderator on the *Moderators* tab for the task in the *Workflow Template Editor*.
5. Click **Execute** then **OK** to confirm. The selected tasks are assigned to the selected moderator.

6. The **Bulk actions** dialog confirms the selected tasks have been successfully processed. An example is shown in Figure 58.

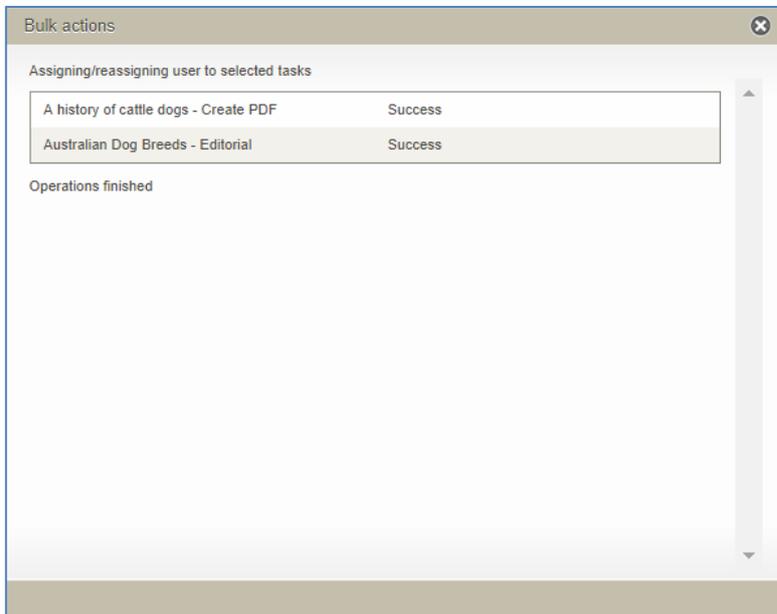


Figure 58 Bulk actions confirmation dialog

A notification is sent to the assignee to inform them of the task assignments.

Task statistics portlet

A Tasks statistics portlet can be added to an administrator's Dashboard to display basic information relating to the number of tasks in a workflow over a weekly or monthly time period.

To create a Task statistics portlet

1. From the Dashboard page, click **Screen options**. The screen options display at the top of the screen.
2. Click the **Tasks statistics** link. An example is shown in Figure 59.

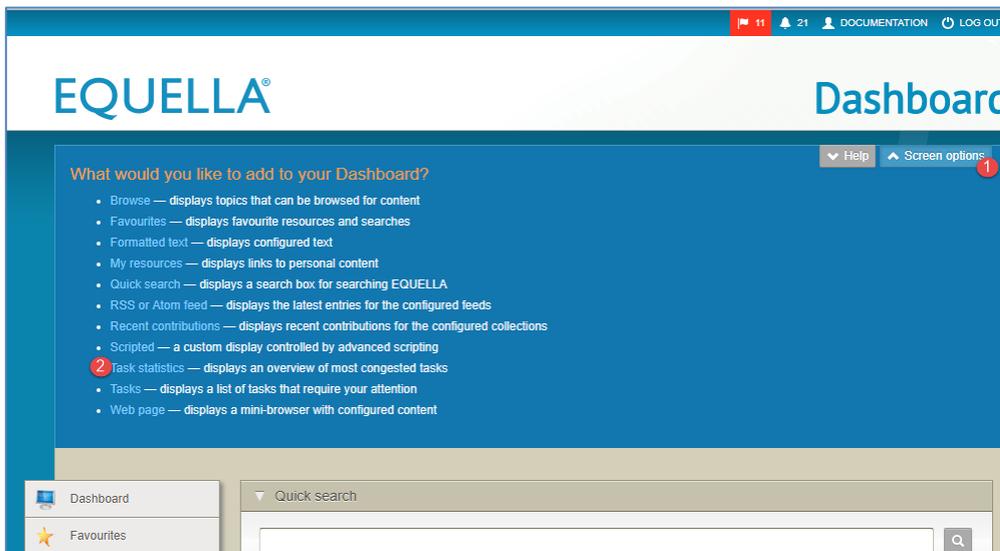


Figure 59 Screen options—Task statistics

The **Create portlet** page displays, as shown in Figure 60.

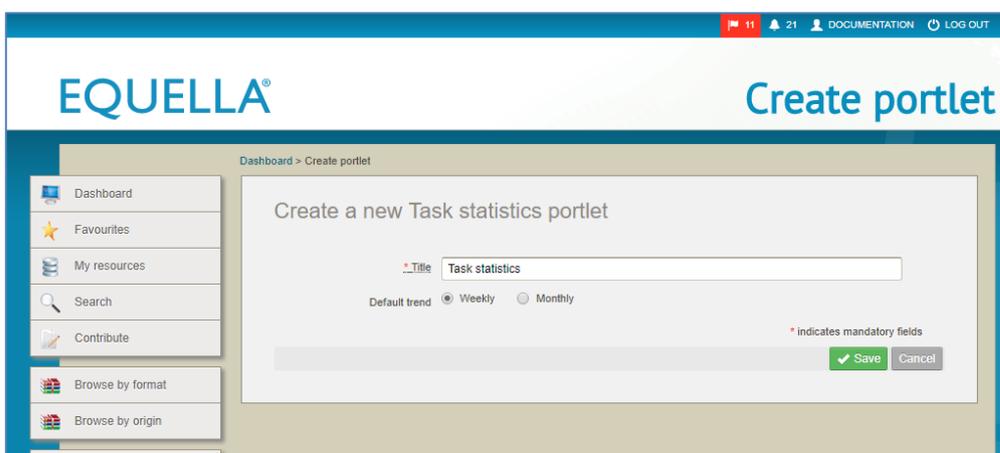


Figure 60 Create portlet page

3. Enter a **Title** (defaults to *Task statistics*).
4. Select a **Default trend** period (*Weekly* or *Monthly*) then click . The new portlet displays on the **Dashboard** page. An example is shown in Figure 61.

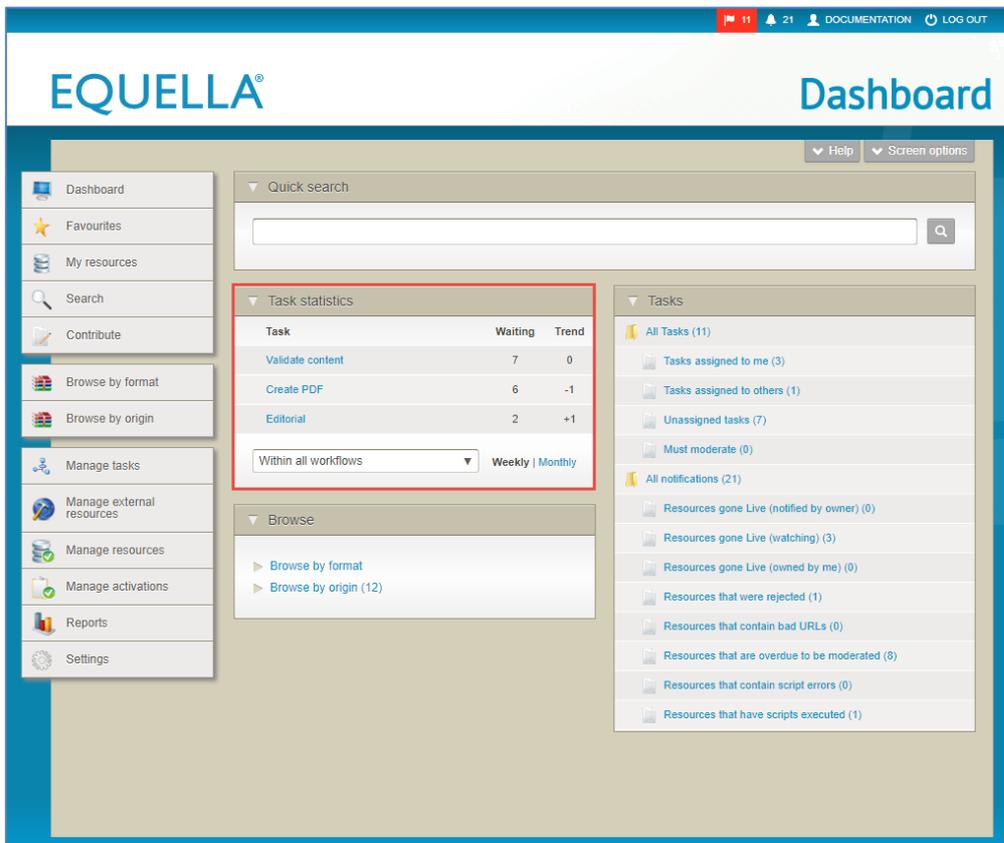


Figure 61 Dashboard with Task statistics portlet

The **Task statistics** portlet lists tasks where there are current resources waiting to be moderated. An example is shown in Figure 62.

Task	Waiting	Trend
Validate content	7	0
Create PDF	6	-1
Editorial	2	+1

Within all workflows Weekly | Monthly

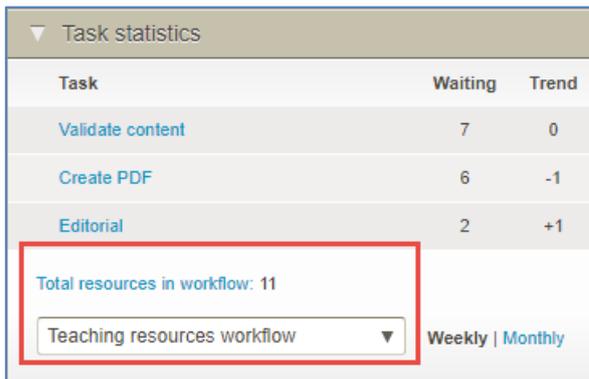
Figure 62 Task statistics portlet

This portlet displays the top five tasks with waiting items, ordered by number of waiting items. (In the example above, there are only three tasks with waiting resources hence it only shows three rows.)

The Task statistics portlet elements include:

- **Task**—the name of the workflow task. Select the links to open the **Manage tasks** page with filters set to display the results at the selected workflow task in the appropriate workflow.
- **Waiting**—the number of resources currently awaiting moderation at that task.

- **Trend**—the number of resources that were awaiting moderation at this task at the same time the previous week or month, which is valuable for comparisons.
- **Workflow drop-down**—select a specific workflow from the drop-down list to limit the results. When a workflow is selected, a **Total resources in workflow** link displays. An example is shown in Figure 63.



Task	Waiting	Trend
Validate content	7	0
Create PDF	6	-1
Editorial	2	+1

[Total resources in workflow: 11](#)

[Teaching resources workflow](#) Weekly | Monthly

Figure 63 Task statistics with selected workflow

Select this link to display the Manage resource page, with the relevant resources listed as results.

- **Weekly | Monthly**—select the links to change the trend between weekly and monthly.

(NOTE: Users will need the 'MANAGE_WORKFLOW' privilege granted to see any of the information in the Tasks Statistics portlet.)

Contact Client Support

We are always happy to help.

Please call 1800 EDALEX (1800 332539) to speak to our Support Team or email support@edalexolutions.com.