CEIAR-Document Management System (DMS)

https://dms.tiss.edu

Introduction and Getting Started Guide

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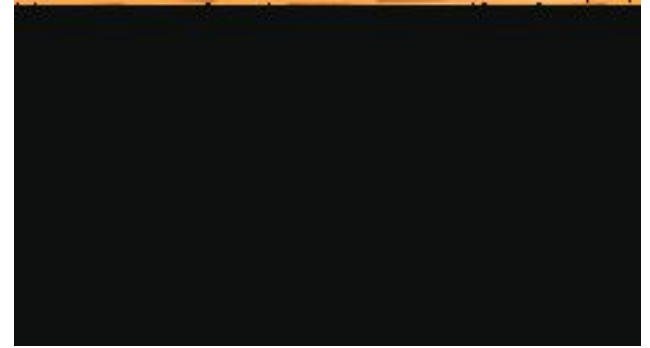
Content

- What is CEIAR-Document Management System (DMS)

- DSpace - features, structure and basic terminologies

- CEIAR-DMS structure/information architecture

- Standard operating procedure (SoP)

- Roles and responsibilities

- Additional help material

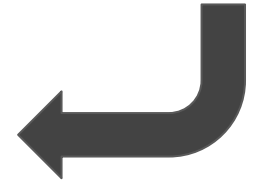# Need for a DMS?

We have lots of documentation...

But when it comes to finding/searching...

Hope not...

Quite often...

3

What is CEIAR-Document Management System (DMS)?

- An online application where various kinds of documents can be efficiently managed.

- URL https://dms.tiss.edu
  - Uses a free and open source software called DSpace - a widely used institutional repository application.

Towards an informed choice:

- We surveyed ckan, nextcloud, eprints and DSpace and found that the last one could best fulfill our requirements.

- TISS Library also uses DSpace http://dspace.tiss.edu/jspui/ to archive thesis and other documents.

CEIAR-DMS Key Features

Organise documents in required structure

Upload in almost any media format

Search/filter based on metadata

Control Access

https://dms.tiss.edu

Note:

- @clixindia drive is where documents can be created by all CEIAR staff, collaboratively edited and kept in draft etcetera.

- DMS is where only finalised documents will be uploaded so that these can be used easily searched and used as reference.

- To avoid messiness, only limited people within CEIAR will have access to upload documents on DMS.

- To enable efficient search and retrieval, documents will be uploaded with necessary and sufficient metadata.

DSpace - structure & terminologies

1

A top level organizational entity - department, project, program etc.

Almost any file format:
- PDF
- Document (.docx/.odt/...)
- Spreadsheet (.xls/.csv/.ods/...)
- Images (.png/.jpg/.svg/...)
- Presentation (.pptx/.odp/...)
- ...

Item 1

Item n

Collection 1

Collection n

Community

3

An item is most basic entity and contains one or more files.

2

A collection contains items(=files). Collections can be organized around a topic, or type of information etc.

Sub community

Collection 1

Item 1

Item n

Collection n

CEIAR-DMS Structure/Information Architecture: Example-1

Almost any file format:
- PDF
- Document
- Spreadsheet
- Images
- Presentation
- ...

Teaching Programs

- **Compendiums**
  - **MA Education compendium**
  - **MA EE compendium**
- **Across program collection**
- **MA Education**
  - **MA Education 2019-20**
    - **Course 1**
      - Doc 1
      - Doc n
    - **Course 2**
  - **MA Education 2020-21**
  - **MA Education admin documents**
- **MPhil-PhD**

CEIAR-DMS Structure/Information Architecture: Example-2

Almost any file format:
- PDF
- Document
- Spreadsheet
- Images
- Presentation
- ...

CLIx

CLIx-Project-Docs
- CLIx-Annual Work Plan-2020-21
- CLIx-MoUs/ToRs

CLIx-Communication-Collaterals

CLIx-Implementation
- CLIx-Chhattisgarh
  - Doc 1
  - Doc n
- CLIx-Telangana
- xyz

CLIx-Research

Standard operating procedure (SoP) - creating collections/ sub-communities

1. Carefully consider the need and decide on structure and number of folders to be created. Avoid redundancy.
2. Check access control
3. Give appropriate title/name (Eg:Name of the project_Year)
4. Add one line description
5. Add introductory text
   a. Sample text
   b. Details about what types of documents are included
   c. Admin/maintainer details
6. Set publication workflow
   a. Approval/review

Tips:

1. Metadata and authorization/access control for a community/collection can also be changed at any stage by admins.
2. Items within a collection can also have different authorization than the collection it resides into. For example, in a private collection some items can be made public.

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Standard operating procedure (SoP) - items and files

1. Upload finalised (could be 0th version) documents only.
2. Give meaningful title/name (Eg: <Name of the project>-<Name of the file>)

Eg: CLIx-LO-Report

3. Add metadata
   a. Author
   b. Publication date mm/yyyy
   c. Subject keyword (To be given by maintner)
   d. Short description
4. Check access control
5. Follow publication workflow

Tips:

● An extra minute spent on metadata may save you an hour later!
● Subject keyword will help filter particular genre of documents and in the search.
● Keywords are similar to tag.
● **Recommended: Use document Type as keyword**
   ○ Report
   ○ Publication
   ○ Proposal
   ○ Presentation
   ○ Template
● Avoid adding too many keywords or new keywords unless very necessary.

Some use cases:

- Adding an item in multiple collections
- Editing an item to add another file
- Moving Items
- Moving communities/collections
- Workflow management (includes review process step)
- Access control
  - Public access - anyone without login
  - Restricted to people within that collection
  - Private
  - URI for each item
- Email notifications

Tips:

1. To edit a community/collection/item "Admin tools" on the right hand side panel.
2. Using admin tools, metadata as well as authorization (access control) can be modified for a community/collection/item.
3. To verify access control, refresh the browser and also check without login in another browser/incognito window.

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Roles and responsibilities

1. Site admin
2. Community admin
3. Sub-community admin
4. Collection admin

Tips:

1. In the communities/collections where you have admin right you will see "*Admin tools*" section and *Add/Edit* option on right hand side.
2. To see your administrative priviledges, Goto *user profile section* top right -> *Administer*

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Way forward...

1. We can practice in sandbox community

2. Decide a timeline for uploading first set of documents

   a. September 10, 2020?

3. If any support/assistance needed, please reach out to Deepa Bhalerao/Manshvi Palan/Sadaqat Mulla/Satej Shende/Shivani Singh/Vishal Kshirsagar.

Tips:

CEIAR-DMS SoP

- *DMS-Folder-Structure* with Admin details
  - https://docs.google.com/spreadsheets/d/1FbBN46I646JHvL2WKyMe-nTgglx0HUgAtFyit3s477M/edit#gid=1848489233

- DMS-SoP
  - https://docs.google.com/document/d/1Volq6vnpmBROKoDu8pgyBZycdFMKmncyI3mZ5k6fU1Y/edit#

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DSpace help guides and references

1. DSpace help section https://dms.tiss.edu/jspui/help/index.html

2. The DSpace Course https://demo.dspace.org/jspui/handle/10673/52

3. DSpace End User FAQ https://wiki.lyrasis.org/display/DSPACE/User+FAQ

4. DSpace wiki https://wiki.lyrasis.org/display/DSPACE/Home

5. SUNScholar/Practical guidelines for starting an institutional repository (IR)
https://wiki.lib.sun.ac.za/index.php/SUNScholar/Practical_guidelines_for_starting_an_institutional_repository_%28IR%29

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Thank You

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