

Background Jobs

Overview	1
Renaming/Clarifying “Background Jobs”	1
Background Jobs Menu Clarification	2
Functionality and Visual Layout of Background Jobs	3
Jobs list view and search functionality	4
Completed Jobs functionality and view	6
Current view of New Background Job -- Reports:	8
Proposed view of the Reports List view	8
Export menu functionality of Print Resource to PDF	9
Accessions integration with Import/Export/PDF functions	9
Additional topics	10
CSV Importer	10
Download CSV	10
Customize File Naming for Export Background Jobs	11

Overview

In this document, SIEWG addressed potentially renaming background jobs and its functions for clarity, improving the visual layout of background jobs and the availability of functions within menus, streamlining navigation for creating jobs, and enhancing jobs functionality.

Renaming/Clarifying “Background Jobs”

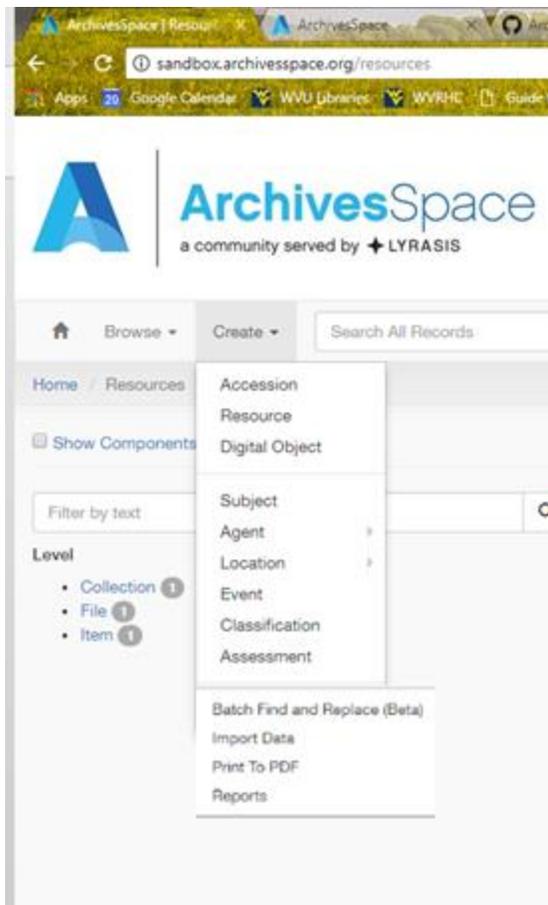
- The Background Job option under Create seems to be a catch-all term for importing data, exporting data and reports, and completing batch editing. These functions may run in the background, but that term is meaningless for users, and nesting the functions under this title only adds an extra click/layer of work for users. Consider getting rid of this overarching term and moving each of the tasks to a higher level on menus.

Issues:

- Current name has no meaning for users
- Not clear what functions users can expect from this menu option

Possible Solutions:

- Rename “Background Jobs” to a more intuitive label, some suggestions include “Import/Export,” “New Job,” “Actions,” “Functions,” “Tools,” etc. OR
- Break the subcategories out of Background Jobs so they stand on their own, as in the image below:



Additional Term Changes

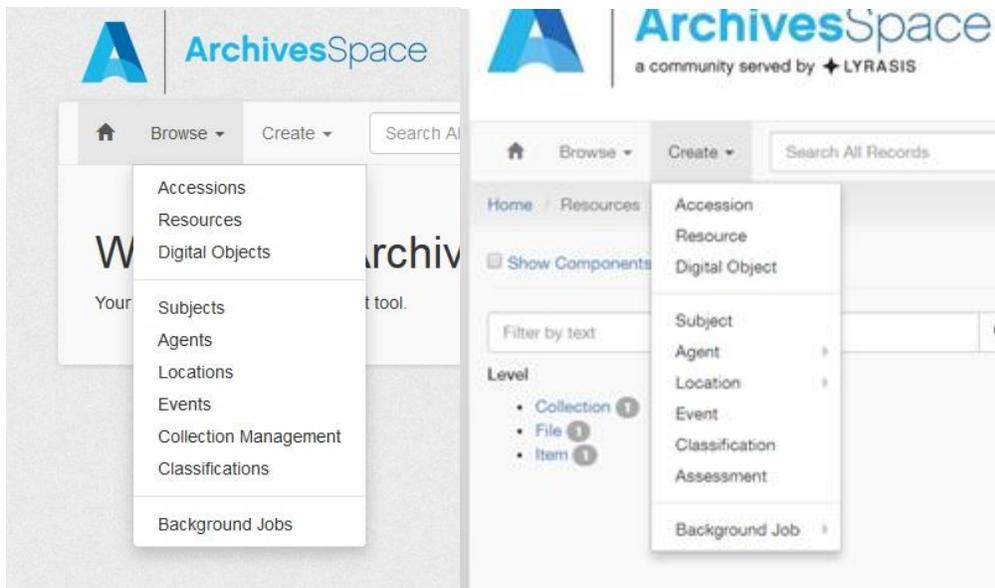
- Under the menu “Background Jobs” is the option to “Print to PDF.” To make it clear what this option allows users to do, this term should be changed to “Generate PDF.” (If this change is made, the language within the export menu of resource records could be changed to match.)
- The term “Reports” should be changed to “Create Report” to align it with the other options in this menu.
- The “Queue Job” button should be changed to “Start Job”/“Submit” or something like that (depending on whether we want to keep calling these jobs).

Background Jobs Menu Clarification

Issue:

- There are two ways to access Background Jobs - “Create” takes you to “New Background Job”, and “Browse” takes you to “Background Jobs”, which is a list of active and archived jobs

Current View: seemingly duplicate “Background Jobs” listing (although functionally different) on “Browse” and “Create” menus



Suggested solution:

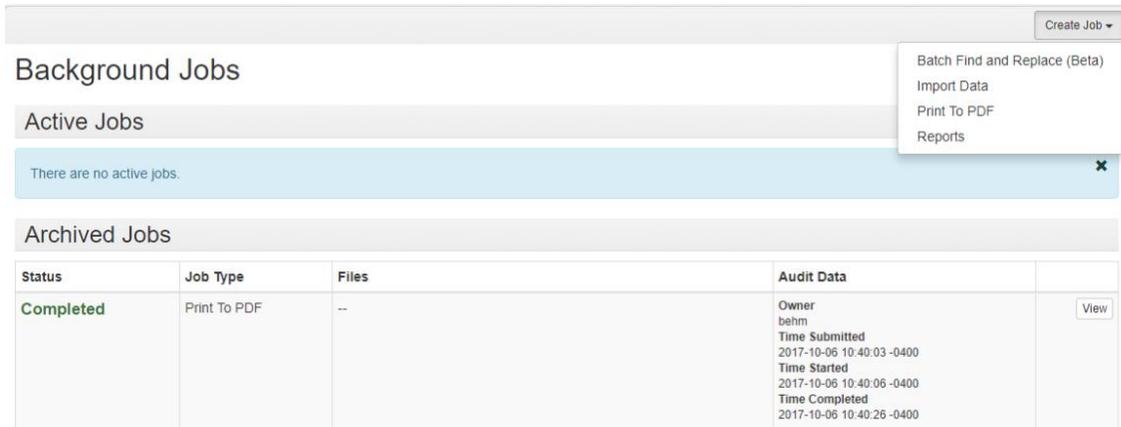
- Consider letting the jobs and reports be top level menu items (see image under “Renaming/Clarifying” above)
- Rename “Browse” option to “Background Job History” OR break it out as has been suggested for the “Create” menu, which could give us the following instead of “Background Jobs”:
 - Batch Find and Replace (Beta) History [sidenote--is this really still in beta?]
 - Data Import History
 - PDFs Generated
 - Reports Generated

Functionality and Visual Layout of Background Jobs

Issues:

- Many items seem to be overly nested in Background Jobs, requiring the user to click more than they should have to in order to view basic information.
- Would like downloadable file to appear in the “Files” column of the Background Jobs history page (Make the name of the downloadable file appear in the Files column of the ‘Background Jobs’ table -- [ANW-83](#))
- You must open the completed jobs page to access the created file, and it is not immediately apparent where this is.
- The current list view for Jobs doesn’t give enough information to easily search/utilize older Jobs.
- Archived Jobs remain indefinitely, users want the option to manage them (Add Ability to Delete an Archived Background Job -- [ANW-84](#))

Current view of Background Jobs:



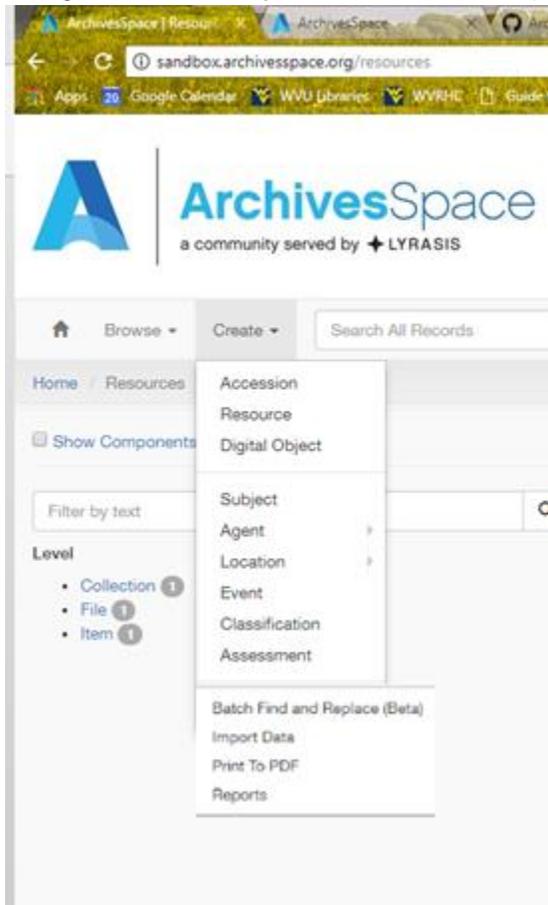
[Proposed] Jobs list view and search functionality (see image below):

- Contents of “Create Job” now a ribbon of buttons immediately under Background Jobs
- Includes a Search Background Jobs function
- Revises the order of Archived Jobs columns to be more mobile-friendly and functional:
 - Actions (includes option to View, Download File, and Delete Job), Job Type, Job Summary (to enable a baseline of searching old Jobs), Audit Data, and Status.
- Make the Archived Jobs columns sortable and searchable both in the specific job pages and also by the main search box. In a sidebar, the list view should be sortable by Job Type and date.
- Add a “Delete Job” or radio button on the list view to delete one or multiple Jobs, and possibly add a retention settings under System Settings which could:
 - Automatically delete background jobs after a certain amount of time
 - Only save the last 50/100/1000 jobs.
 - “Save only” with radio buttons to select the category of Imports/Exports/Reports
 - Note: this function would only delete the record of the background job in the history list, not the generated file or data itself

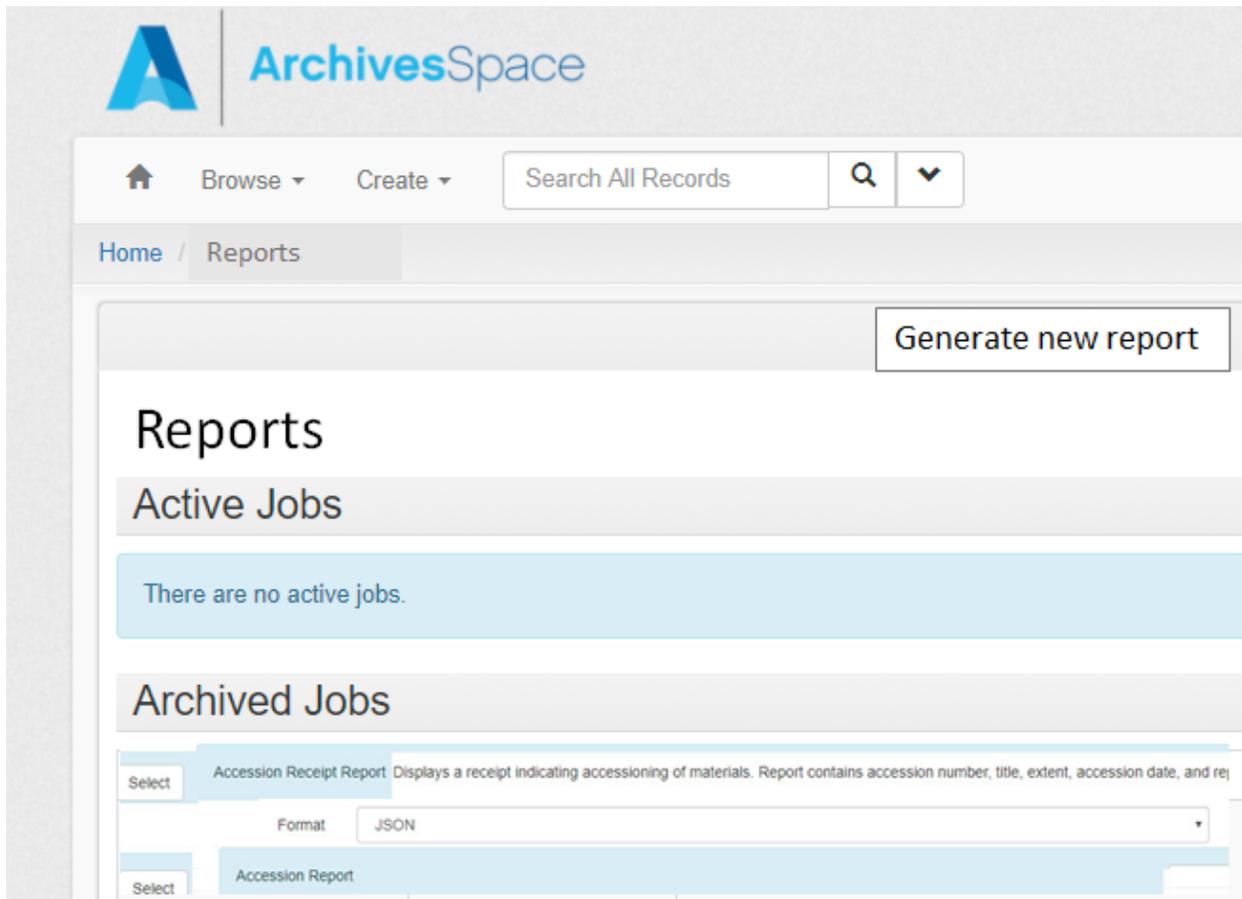


ALTERNATE Proposed Jobs list view:

What if the top-level Create drop-down menu (with Background Job removed and the old job categories all directly in the Create menu):



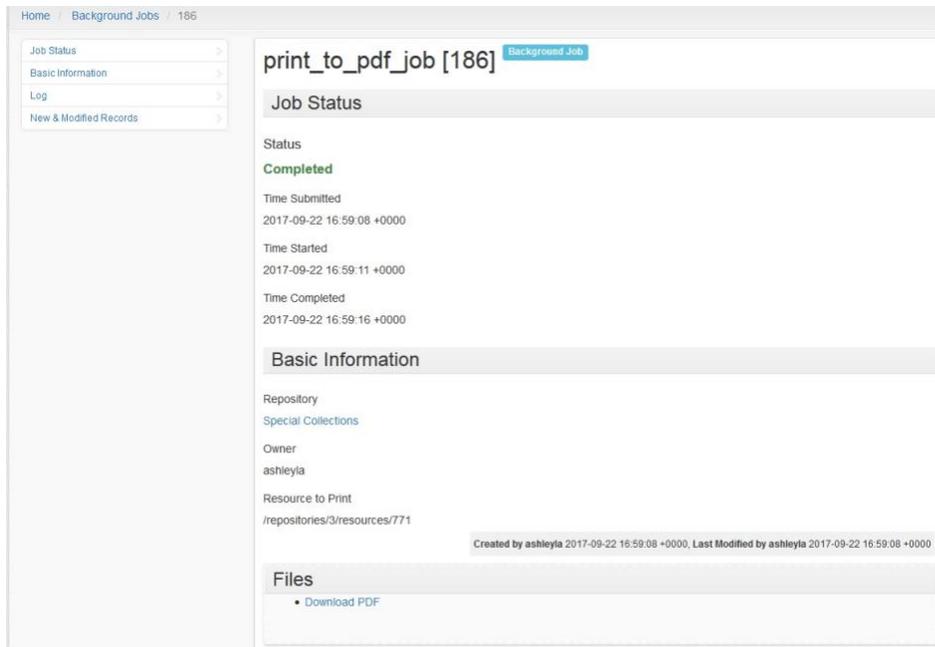
Led directly to this view for each category of action:



Completed Jobs functionality and view

Issue:

- The file is buried below most views of the browser screen and many users don't realize they need to scroll down.
- A file is downloadable even for import jobs (not sure why this happens or what function it accomplishes)
- There isn't a straightforward way to re-attempt a job or start a new job. Currently, if an import job fails, clicking on "Background Jobs" in the left menu takes you to your job history but to actually re-attempt the import job you must navigate from the main "Create" menu.



<--- teensy tiny

Suggested Solution:

- Increase the prominence and location for Downloading Files. Have the option to download the generated file in one or both of the following locations: the side menu and/or have that link/button clearly available at the end of the "Job Status" section. A large button would be ideal, visually.
- Add a "New Job" or "Edit/Retry Job" option
 - Note: "Job" should be replaced by the new umbrella term chosen for "Background Jobs", e.g. "New Report" or "Edit/Retry Report"
- Change "Background Jobs" in the left floating menu to "View Job History" to clarify its function

Home / Background Jobs / 1131

print_to_pdf_job [1131] Background Job

Job Status

Status **Completed**

Time Submitted 2017-10-02 11:12:13 -0400

Time Started 2017-10-02 11:12:17 -0400

Time Completed 2017-10-02 11:12:22 -0400

Download File

Basic Information

Repository SPC

Owner ltang5

Resource to Print /repositories/2/resources/1609

Job Status >

Basic Information >

Log >

New & Modified Records >

Delete Job

Start New Job

Redo Job

Download File

Current view of New Background Job -- Reports:

New Background Job — Reports

Choose a report to run by using the **Select** button.

Reports

Accession Receipt Report

Show Description Select

Displays a receipt indicating accessioning of materials. Report contains accession number, title, extent, accession date, and repository.

Format JSON

Accession Report

Show Description Select

Accessions Acquired and Linked Deaccession Records

Show Description Select

Proposed view of the Reports List view

Adds the description next to each report and moves the Select button to the left side to be more mobile-friendly.

New Background Job — Reports

Choose a report to run by using the **Select** button.

Reports

The screenshot shows a web interface for selecting reports. At the top, there is a green instruction bar: "Choose a report to run by using the **Select** button." Below this, the heading "Reports" is displayed. The main area contains a list of reports, each with a "Select" button on the left and a description on the right. The first report is "Accession Receipt Report" with the description "Displays a receipt indicating accessioning of materials. Report contains accession number, title, extent, accession date, and repository." Below the list, there is a "Format" dropdown menu currently set to "JSON". At the bottom, there is a search bar.

Export menu functionality of Print Resource to PDF

- When I want to print a PDF of a resource record, I often start in the resource record by clicking on Export, then Print Resource to PDF. This takes me to Background Jobs page where I have to search for the resource record that I started from--that information is not carried over automatically. This seems like an unnecessary number of steps.

Issue:

- Using the "Export" menu from within a resource does not carry the information about that resource over to the "Print To PDF" page
- Print to PDF from the Export menu does nothing differently from selecting "Background Jobs" under "Create".

Suggested Solution:

- We recommend implementing the solution described in [ANW-142](#), "As an archivist, I'd like Print-to-PDF to require fewer steps" in the next release. In short, "SWIEG recommends that the Export => Print resource to PDF flyout immediately start the printing job, i.e. do not go to a search page, instead just print the resource record that was linked from." As of December 13, 2017, this JIRA status is "Ready for Implementation" and has not yet been implemented in the v. 2.2.1 sandbox.

Accessions integration with Import/Export/PDF functions

Issue:

- Accessions cannot be exported/printed (Add ability to print an accession -- [ANW-28](#))

Suggested Solution:

- Add the ability to search and select Accessions when initiating Background Jobs.
- Add the ability to export accession records with the same capabilities as Resource records, including CSV, MARC, EAD, and PDF. This would enable easily creating stub catalog records as well as printing a PDF for internal administrative records.

Additional topics

Although we were unable to fully flesh out these suggestions below within our allotted time, these topics possibly present greater ease and functionality with the program in the Background Jobs capacity.

CSV Importer

As described in [Ar-935: Provide a CSV importer for resources](#), it would be great to be able to download the supported CSV template from the application and be able to import full Resource records as well as Archival Components (such as Series) and Digital Objects.

Download CSV

Although not officially a Background Job, we wanted to document the existing issue of downloading CSVs. Currently, these are the returned results from the clicking “Download CSV.”

Browse Container Profiles ×

id,uri,title,primary_type,types,json,suppressed,publish,system_generated,repository,created_by,last_modified_by,user_mtime,system_mtime,c
"/container_profiles/29"/container_profiles/29,"13 x 18 flat box [18d, 3h, 13w inches] extent measured by
width",container_profile,container_profile,{"lock_version":9,"name":"13 x 18 flat
box","extent_dimension":{"width","height":"3","width":"13","depth":"18","created_by":"ltang5","last_modified_by":"ltar
04-25T14:49:31Z","system_mtime":"2017-09-20T20:48:23Z","user_mtime":"2017-09-
20T20:48:23Z","stacking_limit":"3","dimension_units":"inches","jsonmodel_type":"container_profile","uri":"/container_profiles/
x 18 flat box [18d, 3h, 13w inches] extent measured by width"},"false,false,false,global,ltang5,ltang5,2017-09-20T20:48:23Z,2017-09-
20T20:48:23Z,2017-04-25T14:49:31Z,"13 x 18 flat box [18d, 3h, 13w inches] extent measured by
width",13,3,18,inches,1579093107301941248 "/container_profiles/21"/container_profiles/21,"1.5 x 13 x 10 small flat box [13d, 1.5h, 10w
inches] extent measured by width",container_profile,container_profile,{"lock_version":4,"name":"1.5 x 13 x 10 small flat
box","extent_dimension":{"width","height":"1.5","width":"10","depth":"13","created_by":"behm","last_modified_by":"b
02-09T21:40:19Z","system_mtime":"2017-09-11T13:08:32Z","user_mtime":"2017-02-
09T21:47:13Z","stacking_limit":"5","dimension_units":"inches","jsonmodel_type":"container_profile","uri":"/container_profiles/
x 13 x 10 small flat box [13d, 1.5h, 10w inches] extent measured by width"},"false,false,false,global,behm,behm,2017-02-
09T21:47:13Z,2017-09-11T13:08:32Z,2017-02-09T21:40:19Z,"1.5 x 13 x 10 small flat box [13d, 1.5h, 10w inches] extent measured by
width".10.1.5.13.inches.157825756224033792 "/container_profiles/25"/container_profiles/25,"19 x 25 flat box [19d. 3h. 25w inches]

Link to Container ProfilesCancel

When using checkboxes to select search results or Container Profiles and triggering the “Download CSV” function, the user expects that only those selected objects will download, but everything does.

Home / Accessions

Filter by text

Accessions

Showing 1 - 10 of 38 Results Sort by:

<input type="checkbox"/>	Title	Accession Date	Identifier		
<input checked="" type="checkbox"/>	Lansing Association for Human Rights (LAHR) records	2016-01-29	2016-01	Created by Itang5 2016-03-17 11:30:12 -0400 Last Modified by Itang5 2016-03-29 11:02:48 -0400	<input type="button" value="View"/> <input type="button" value="Edit"/>
<input checked="" type="checkbox"/>	Michigan Womyn's Music Festival records	2016-04-28	2016-02	Created by Itang5 2016-06-03 11:36:47 -0400 Last Modified by Itang5 2016-06-03 11:36:47 -0400	<input type="button" value="View"/> <input type="button" value="Edit"/>
<input type="checkbox"/>	Africana photo albums	2016-06-03	2016-03	Created by Itang5	<input type="button" value="View"/> <input type="button" value="Edit"/>

Accession Date

- 2017 17
- 2016 11
- 2014 2
- 2015 2
- 1981 1
- 1987 1
- 1994 1
- 2002 1
- 2005 1
- 2013 1

Creator

- John Galsworthy 1
- Minty, Judith, 1937- 1

Customize File Naming for Export Background Jobs

It would be great if Repository Managers could customize the file naming convention for Background Job exports. For example, when generating a PDF of a finding aid, some users describe regularly renaming the exported file with the resource identifier and collection title in order for it to be useful for the user and researchers request an emailed PDF of the finding aid.