

ORCA Assessment Workflow – Technical Guide

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1 ORCA Assessment Workflow

One of the major changes in Release 6.1 is the implementation of an Assessment Workflow within the ORCA registry. The workflow allows ANDS to incorporate a level of quality assessment and approval within the record publishing process (both manual and harvest). The workflow relies on a new larger state model* and is managed via an enhanced Manage My Records screen.

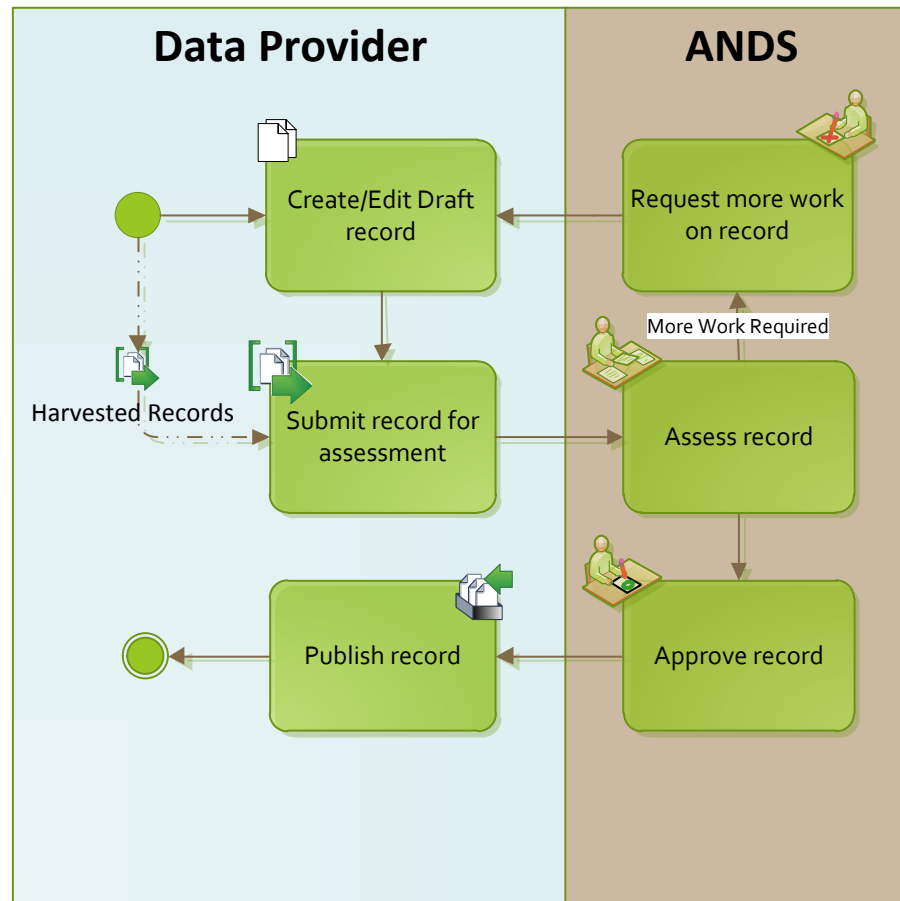
The Assessment Workflow is currently only intended for new data providers who are gathering an understanding of the RIF-CS schema and ANDS metadata best practices. For this reason a 'Quality Assessment Required' flag has been set up in all Data Source Accounts that allows ANDS to manage which data providers are required to publish their records through the new workflow. The flag is set by default for new accounts and can only be managed by ANDS staff with the appropriate ORCA roles.

Implementation of the workflow removes the need for Data Source Administrators to have access to multiple environments (Sandbox and Production), and simplifies the publishing process by allowing records that are to be published to be created directly in the Production environment.

*see [Why do my 'Approved' records now appear as 'Published' on the Manage My Records screen?](#) below for more details.

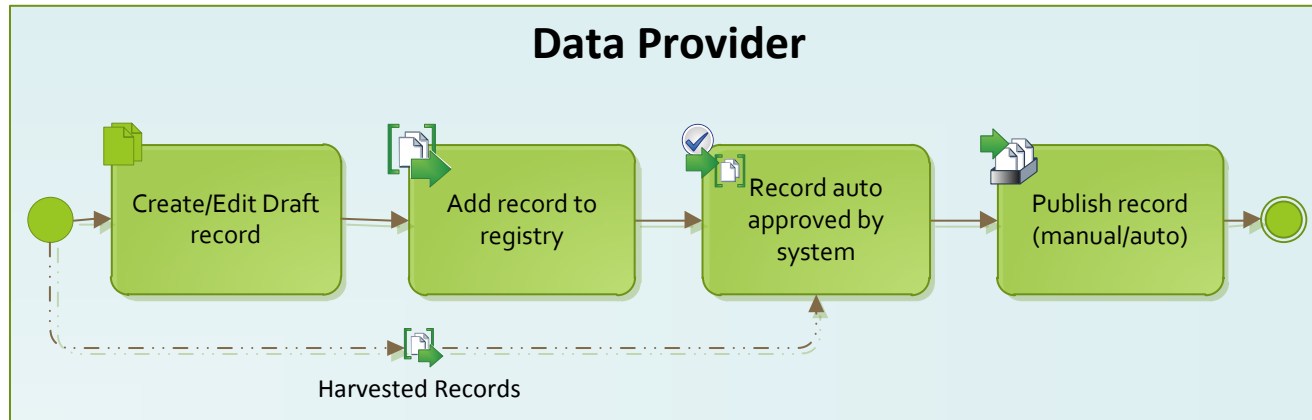
1.1 Publishing Process Through the Assessment Workflow

The diagram below illustrates the basic publishing process for data providers who are required to have their records assessed by ANDS prior to publishing. Each stage of the workflow is managed through the new Manage My Records and Add Record (manual entry) screens. More information on the functionality available to users is found in the following sections of this document.



Note: Harvested records are automatically submitted for assessment.

The diagram below illustrates the publishing process for data providers who are not required to have their records assessed by ANDS prior to publishing.



*Note: Harvested records are automatically approved by the system.
Records are either auto published by the system or manually by the user. See [‘Manually Publish Records’ Flag?](#)*

1.2 What are the changes to the Manage My Records screen?

A number of enhancements have been made to the Manage My Records screen and supporting functionality as part of the Quality Assessment workflow implementation. The following is a list of the main changes:

- Users are able to view and action all records under their data source. (*The screen previously only allowed users to view the records they had created/edited. This caused issues where there were multiple authors of a record as the users couldn't easily collaborate on the single record.*) The last user to update a record will be displayed in the Last Changed column with a date and time.
- New buttons and associated functionality has been added to the screen that allows users to manage records within the quality assessment workflow.
- Errors and Metadata Content Requirements warnings can be easily identified through the use of an Errors/Warnings column.
- Harvested records will now be shown on the screen. The feed type of records will be indicated in a new column. (*The screen previously only showed manually created records. Harvested records are also subject to the quality assessment process and users will now be able to track their progress via the screen.*)
- A Select/Deselect all button has been added to allow users to quickly action multiple records.
- Users who manage multiple data sources will now be able to select which data source they wish to manage on the screen via a data source drop down box.

- Logout
- Change Built-in Passphrase
- Administration
 - List Roles
 - Add Roles
 - Reset Built-in Passphrase
- Styles Documentation
 - General Styles
 - Form Styles
- Collections Registry
 - Search
 - Web Services
- Register My Data
 - My Registry Objects
 - Manage My Records
 - Add New Record
 - Activity
 - Collection
 - Party
 - Service
 - My Data Sources
 - Add Data Source
 - List My Data Sources
 - Data Source Quality Check
 - Export from Data Source
- PIDS IP Administration
 - Add Trusted IP
 - List Trusted IPs

Manage My Records

Managing My Records for: Belvedere Walkthrough 1 [Manage this Data Source](#)

[Hide Information](#)

- This tool allows you to view and manage the records which you have recently created, edited or harvested.
- Records entered into the ANDS registry under the data source 'Belvedere Walkthrough 1' need to be assessed and approved by ANDS staff. Please contact your ANDS client liaison officer for more information.
- Your data source administrator currently has this data source set to 'Manually Publish Records'. Records will need to be manually published from this screen once approved by ANDS.

More Work Required (2 records found) [edit these records and resubmit them for assessment](#)

<input type="checkbox"/>	Record Key	Name/Title	Last Changed	Class	Errors / Warnings	Options	Flag	Feed Type	Status
1	Belvedere8	Great Barrier Reef Outlook Project	10:49 am, 13 Sep 11 by: Harvester	Activity	0		★	Harvest	More Work Required
2	Belvedere5	Sarah Geggan	10:49 am, 13 Sep 11 by: Harvester	Party	0		★	Harvest	More Work Required

Draft Records (2 records found) [Submit for Assessment](#) [Delete](#)

<input type="checkbox"/>	Record Key	Name/Title	Last Changed	Class	Errors / Warnings	Options	Flag	Feed Type	Status
1	Belvedere2	Great Barrier Reef Landscape Scenes	10:48 am, 13 Sep 11 by: Harvester	Collection	0		★	Harvest	Draft Records
2	Belvedere1	Great Barrier Reef Aerial Photography	10:48 am, 13 Sep 11 by: Harvester	Collection	0		★	Harvest	Draft Records

Records Submitted for Assessment (2 records found) [Start Assessment](#) [Revert to Draft](#)

<input type="checkbox"/>	Record Key	Name/Title	Last Changed	Class	Errors / Warnings	Options	Flag	Feed Type	Status
1	Belvedere4	Simon Smitherson	10:09 am, 2 Sep 11 by: Harvester	Party	0		★	Harvest	Records Submitted for Assessment
2	Belvedere3	Great Barrier Reef Reefscape Scenes	10:09 am, 2 Sep 11 by: Harvester	Collection	0		★	Harvest	Records Submitted for Assessment

Record Assessment in Progress (2 records found) [Approve](#) [More Work Required](#)

<input type="checkbox"/>	Record Key	Name/Title	Last Changed	Class	Errors / Warnings	Options	Flag	Feed Type	Status
1	Belvedere10	High Definition Phantom Reef Camera	10:48 am, 13 Sep 11 by: Harvester	Service	0		★	Harvest	Record Assessment in Progress
2	Belvedere9	Great Barrier Reef Marine Park Authority	10:48 am, 13 Sep 11 by: Harvester	Party	0		★	Harvest	Record Assessment in Progress

Approved Records (1 record found) [Publish](#) [Delete](#)

<input type="checkbox"/>	Record Key	Name/Title	Last Changed	Class	Errors / Warnings	Options	Flag	Feed Type	Status
1	Belvedere7	Remaining Impacts from fishing Project	10:48 am, 13 Sep 11	Activity	0		★	Harvest	Approved Records

Records Published in the last 7 days (1 record found) [Delete](#)

<input type="checkbox"/>	Record Key	Name/Title	Last Changed	Class	Errors / Warnings	Options	Flag	Feed Type	Status
1	Belvedere6	Peter Teethers	10:48 am, 13 Sep 11	Party	0		★	Harvest	Records Published in the last 7 days

Add New record

1. New Manage My Records Screen

1.2.1 Why do my 'Approved' records now appear as 'Published' on the Manage My Records screen?

In order to implement the new Quality Assessment workflow the ORCA record state model was expanded with additional statuses. A number of the new statuses are only visible to data source administrators that are required to have their records assessed by ANDS before publishing.

One major change to note is that the meaning of the 'Approved' status has been altered. Previously 'Approved' records were visible in Research Data Australia and the ORCA registry to general users. From release 6.1 only 'Published' records will be visible in Research Data Australia and the ORCA registry to general users. Any records that were a status of 'Approved' prior to the 6.1 release will have been migrated by ANDS to a status of 'Published'. An explanation of each of the statuses is below:

Status	Definition
Draft	The record is still being worked on by the user.
Submitted for Assessment	The record has been submitted for assessment.
Assessment in Progress	The record is currently being assessed by an ANDS Quality Assessor.
More Work Required	The record has been assessed by an ANDS Quality Assessor who has determined that further work is required on the record.
Approved	The record has been approved by ANDS. <i>These records are not visible in Research Data Australia.</i>
Published	The record has been published. <i>These records are visible in Research Data Australia. (See section What is the 'Manually Publish Records' Flag? for more information on publishing records)</i>
Deleted	The previously 'Approved' or 'Published' record has been deleted. <i>These records can be restored via the history tool.</i>

1.2.1.1 What is the difference between the record statuses?

Record Behaviour	Unapproved Statuses				Approved Statuses		
	Draft	Submitted for Assessment	Assessment in Progress	More Work Required	Approved	Published	Deleted
Changes status to 'Draft' upon edit		✓	✓	✓	X	X	X
Creates duplicate 'Draft' record upon edit		X	X	X	✓	✓	✓ (via History Tool)
Can be restored via History Tool after being deleted.	X	X	X	X	✓	✓	
Displayed in Research Data Australia	X	X	X	X	X	✓	X
Visible on Manage My Records screen if data source is not flagged as requiring Quality Assessment	✓	X	X	X	✓	✓	X
Visible on Manage My Records screen if data source is flagged as requiring Quality Assessment	✓	✓	✓	✓	✓	✓	X

Notes:

- Editing records in a status of 'More Work Required', 'Submitted for Assessment' & 'Assessment in Progress' changes the status of the record to 'Draft'.
- 'Submitted for Assessment' & 'Assessment in Progress' records can only be edited by ANDS staff.
- Unapproved status records that have not previously been through to an Approved status do not have a backup. When these records are deleted they are deleted permanently and cannot be restored via the History Tool.
- Editing records in an Approved status creates a duplicate of the record with a 'Draft' status. Approved status records are only overwritten when a 'Draft' duplicate is pushed through to an Approved status. This means that it's possible for a single record to have 2 versions:
 1. 'Draft', 'Submitted for Assessment' or 'More Work Required',
 2. 'Approved' or 'Published'

1.2.2 Moving Records through the Workflow

A record can be moved through the workflow via the Manage My Records screen by selecting the record using the checkbox at the start of the row, then using the buttons available in the header of each table. Multiple records can be actioned by selecting multiple records.

Draft Records (2 records found)										Submit for Assessment	Delete
	<input type="checkbox"/>	Record Key	Name/Title	Last Changed	Class	Errors / Warnings	Options	Flag	Feed Type	Status	
1	<input checked="" type="checkbox"/>	Belvedere2	Great Barrier Reef Landscape Scene	10:48 am, 13 Sep 11 by: Harvester	Collection				Harvest	Draft Records	
2	<input checked="" type="checkbox"/>	Belvedere1	Great Barrier Reef Aerial Photograph	10:48 am, 13 Sep 11 by: Harvester	Collection				Harvest	Draft Records	

2. Submitting records for assessment via Manage My Records

Note: Which buttons are available depends on the users roll. Certain actions cannot be performed on some statuses (e.g. 'Submitted for Assessment' records cannot be deleted). For more detail of who can perform which actions please refer to the [Appendix A – Actor Functionality Matrix](#).

1.2.3 Deleting Records

Users are only able to delete records that are in a status 'More Work Required', 'Draft', 'Approved' or 'Published'. This can be achieved by either:

- Using the delete icon shown in the options column of each record, Or
- By selecting the records to be deleted using the checkbox next to each record then using the Delete button shown in the header of the table.

Draft Records (2 records found)										Submit for Assessment	Delete
	<input type="checkbox"/>	Record Key	Name/Title	Last Changed	Class	Errors / Warnings	Options	Flag	Feed Type	Status	
1	<input type="checkbox"/>	Belvedere2	Great Barrier Reef Landscape Scene	10:48 am, 13 Sep 11 by: Harvester	Collection				Harvest	Draft Records	
2	<input type="checkbox"/>	Belvedere1	Great Barrier Reef Aerial Photograph	10:48 am, 13 Sep 11 by: Harvester	Collection				Harvest	Draft Records	

3. Deleting records via the Manage My Records screen

Records that are in a status of 'Submitted for Assessment' or 'Assessment in Progress' cannot be deleted directly and will need to be changed to a status of 'Draft' or 'More Work Required' before they can be deleted.

- 'Submitted for Assessment' records can only be changed to a status of 'Draft' by ANDS. Users will need to speak to their ANDS Liaison Officer to have them changed. This can be carried out by the ANDS Client Liaison or Quality Assessor by using the 'Revert to Draft' button. (See [Reverting 'Submitted for Assessment' Records to 'Draft'](#)).

- ‘Assessment in Progress’ records can also only be changed to a status of ‘More Work Required’ by ANDS. Users will need to speak to their ANDS Client Liaison Officer to have the records moved to a status of ‘More Work Required’.

Note: As explained earlier the only records that can be restored via the History Tool after being deleted are ‘Approved and ‘Published’ records. The History Tool can be accessed from the top of the Manage My Records screen by clicking on the ‘View Data Source History’ link. For more detail of who can perform which actions please refer to the [Appendix A – Actor Functionality Matrix](#).

1.2.4 Reverting ‘Submitted for Assessment’ Records to ‘Draft’

Where a user has accidentally submitted multiple records for assessment, or has decided they would like to make additional changes before the assessment, the user will need to speak to their ANDS Client Liaison Officer to revert the records from a status of ‘Submitted for Assessment’ to ‘Draft’.

To revert the records to ‘Draft’ the ANDS Client Liaison Officer needs to:

1. Select the ‘Submitted for Assessment’ records to revert to ‘Draft’ using the checkbox next to each record.
2. Click the ‘Revert to Draft’ button.

Records Submitted for Assessment (2 records found)										Start Assessment	Revert to Draft
	select all	Record Key	Name/Title	Last Changed	Class	Errors / Warnings	Options	Flag	Feed Type	Status	
1	<input checked="" type="checkbox"/>	Belvedere4	Simon Smitherson	10:09 am, 2 Sep 11 by: Harvester	Party				Harvest	Records Submitted for Assessment	
2	<input type="checkbox"/>	Belvedere3	Great Barrier Reef Reefscape Scene	10:09 am, 2 Sep 11 by: Harvester	Collection				Harvest	Records Submitted for Assessment	

4. Reverting records to ‘Draft’ via Manage My Records

Note: No notification is sent to the Quality Assessor to advise that the records have been removed for assessment. The Client Liaison Officer should notify the relevant Quality Assessor of the changes. If the records are already in assessment (‘Assessment in Progress’) the Client Liaison Officer will need to speak to the relevant Quality Assessor to have the records moved to a status of ‘More Work Required’. For more detail of who can perform which actions please refer to the [Appendix A – Actor Functionality Matrix](#).

1.2.5 Flagging Records

The Flag feature on the Manage My Records screen gives users the ability to mark records with an icon which represents a level of importance or grouping (similar to flags used in email applications). The flag is stored with the record and is therefore remembered over a user's separate logins.

Flags are cleared by the system when records change status (e.g. Draft to Submitted for Assessment) allowing the flag feature to be reused at each status.

A feature has also been added to the new 'Select All' button which gives users the choice of only selecting flagged records. This allows users to quickly action all the records they have previously flagged.

Draft Records (2 records found)										Submit for Assessment	Delete
	<input type="checkbox"/>	Record Key	Name/Title	Last Changed	Class	Errors / Warnings	Options	Flag	Feed Type	Status	
1	<input type="checkbox"/>	Belvedere2	Great Barrier Reef Landscape Scene	10:48 am, 13 Sep 11 by: Harvester	Collection				Harvest	Draft Records	
2	<input type="checkbox"/>	Belvedere1	Great Barrier Reef Aerial Photograph	10:48 am, 13 Sep 11 by: Harvester	Collection				Harvest	Draft Records	

5. Flag column on Manage My Records

1.3 What are the changes to the Add/Edit Data Source screen?

In an attempt to make the screen a little more user friendly the layout of the Add/Edit Data Source screen has been changed. Related fields which were previously scattered across the screen are now grouped together under separate headings. 3 new fields have also been added which integrate with the ORCA Approval Workflow. More information can be found in the sections below.

Add Data Source

Account Administration Information

* Key:

* Title:

Record Owner:

Contact Name:

Contact E-mail:

Notes:

Records Management Settings

Reverse Links: Automatically create reverse links within this data source
 Automatically create reverse links from external data sources

Party records to NLA?:

Manually Publish records?:

Quality Assessment Required?

Assessment Notification Email:

Harvester Settings

* URI:

* Provider Type:

* Harvest Method:

Fields marked * are mandatory.

6. New Add/Edit Data Source screen

1.3.1 'Quality Assessment Required' Flag?

To control which data sources are required to publish their records through the Quality Assessment workflow a 'Quality Assessment Required' flag has been set up in all Data Source Accounts. The flag is set by default for new accounts and can only be managed by ANDS staff with the appropriate ORCA roles. Having the flag checked (On) for a data source will force all manually created, edited and harvested records through the Quality Assessment workflow. Once ANDS believes that a data provider has a good understanding of RIF-CS and best practices, the flag can be cleared allowing any future records to be automatically approved.

Having the quality assessment flag at the data source account level may affect aggregators who provide ANDS with data through a single data source. The situation may arise where an aggregator has had part of its data source approved for direct publish access to Research Data Australia while another part is still in the assessment period. As the flag is set at the data source record level all records from the aggregator will be sent through the quality assessment process, possibly holding up previously approved records. Aggregators should discuss how to manage these issues with their ANDS contact.

1.3.1.1 Assessment Notification Email

The Assessment Notification Email field is used to enter the email addresses of ANDS Quality Assessors for a data source. The field is only available when the 'Quality Assessment Required' flag has been checked (On) and can only be managed by ANDS staff with the appropriate ORCA roles. Multiple email addresses can be entered by separating them with a comma. The address will be used in notifying the assessor(s) when a data source's records are submitted for assessment.

Note: If records from a data source are already in a status of 'Submitted for Assessment' (email has been sent) and the data source administrator submits further records for assessment, an additional email will not be sent. This is to prevent numerous emails being sent when a data source administrator is submitting records on a record by record basis.

1.3.2 'Manually Publish Records' Flag?

In some situations data providers may be required to have their records assessed and approved by ANDS but do not want to have them published immediately to Research Data Australia. For these users a 'Manually Publish Records' flag has been set up in all data source records within ORCA. Having the flag checked (On) will prevent records automatically moving from 'Approved' to 'Published' after being approved by a Quality Assessor. Users will need to use the Manage My Records screen to move these records to 'Published'. The flag will not be set by default.

The 'Manually Publish Records' flag will also be useful for approved providers (not required to have their records assessed by ANDS) who wish to test their harvest and view the records in ORCA. By checking the flag (On) the providers harvested records will be held at a status of 'Approved' and will not be visible in Research Data Australia. The provider then has the option to either, delete the records, remove the flag and re-harvest, or publish the records manually via the Manage My Records screen.

1.4 What are the changes to the Add Record (manual entry) screens?

A small number of enhancements have also been made to the Add Record screens to make the managing of records easier for users. The main changes are described below.

The screenshot displays the 'View Collection' interface in the ANDS Online Services. The page title is 'ands Online Services' and the user is logged in as 'Joel Benn (u4884351)'. The collection status is 'ASSESSMENT IN PROGRESS'. A red box highlights the 'Approve' and 'More Work Required' buttons. Another red box highlights a message: 'You are currently viewing this record in Read Only mode. Enable Editing or go back to Manage My Records'. The interface includes a navigation menu on the left with options like 'Logout', 'Change Built-in Passphrase', 'Administration', 'Collections Registry', and 'Register My Data'. The main content area shows a collection with the following details: Type: collection, Key: Belvedere1, Source: Belvedere Walkthrough 1, Originating Source: http://test.ands.org.au/home/orca/register_my_data, Group: Belvedere Walkthrough, and Names: Great Barrier Reef Aerial Photography. A red box highlights the 'Preview in Research Data Australia' button. At the bottom, a note states: 'Fields marked * are mandatory. Data captured through this system will be validated against the RIF-CS 1.2.0 Schema and Metadata Content Requirements.'

7. Enhancements to the Add Records screens

1.4.1 Saving Draft Records

To allow users to manage individual draft records via the Add Record screens new options have been added to the Save Draft tab. These options are only available to data sources which are required to be assessed by ANDS prior to publishing. If the data source does not require assessment normal processing occurs.

The user will be given 3 options on the Save Draft Tab:

- Leave the record as Draft and return to Manage My Records.
- Leave the record as Draft but flag the record as being ready for assessment. (This option adds a flag to the record on the Manage My Records screen. See [Flagging Records](#))
- Submit the record for assessment.



The data source you have entered this record under is currently flagged as requiring assessment and approval by ANDS staff. You may either:

- Leave the record as Draft and return to Manage My Records
- Leave the record as Draft but flag the record as being ready for assessment
- Submit the record for assessment

Continue

8. Options when saving records via the Add Record screens

1.4.2 Read Only Mode

To allow users to view unpublished records, a feature has been added to the Add Record screens that allows users to load records in 'Read Only' mode. 'Read Only' mode allows users to view the errors and warnings within a record while also viewing the final report on the Save Draft tab (without actually affecting the record). An 'Enable Editing' button will be available on 'More Work Required', 'Draft', & 'Approved' records within the Read Only mode to quickly enable changes without navigating back to the Manage My Records screen.

1.4.3 Preview in Research Data Australia

A link that allows users to preview saved unpublished records in Research Data Australia has also been added to the bottom of the Save Draft tab in the Add Record screens. The link is only available after saving 'Draft' records and is always available in Read Only mode.

1.4.4 Approving Records

Changes have also been made to the Add Record screens that allow ANDS Quality Assessors to manage individual ‘Assessment in Progress’ records without returning to the Manage My Records screen. The assessor will be able to approve or request further work on records via ‘Approve Record’ and ‘More Work Required’ buttons shown above the record.

Appendix A – Actor Functionality Matrix

Note: The *Data Source Administrator* and *ANDS Client Liaison* actors can only action records under data sources they are assigned to.

No changes are being made to the administration of the Production environment as part of this project. The Services team should still be contacted for all Production administration requests.

		ACTOR			
		Data Source Administrator	ANDS Client Liaison	ANDS Quality Assessor	ORCA Admin
FUNCTIONALITY	ADD RECORD SCREENS				
	Access Add Record screens	✓	✓	✓	✓
	Manually Create records	✓	✓	✓	✓
	Edit ‘More Work Required’ Records(s)	✓	✓	✓	✓
	Edit ‘Draft’ Records(s)	✓	✓	✓	✓
	Edit ‘Submitted for Assessment’ Records(s)	-	✓	✓	✓
	Edit ‘Assessment in Progress’ Records(s)	-	✓	✓	✓
	Edit ‘Approved’ Records(s)	✓	✓	✓	✓
	Edit ‘Published’ Records(s)	✓	✓	✓	✓
	Submit record(s) for assessment	✓	✓	✓	✓
	Publish ‘Approved’ record(s)	✓	✓	✓	✓
	Approve ‘Assessment In Progress’ record(s)	-	-	✓	✓
	Request more work on ‘Assessment In Progress’ record(s)	-	-	✓	✓
	MANAGE MY RECORDS SCREEN				
Access Manage My Records screen	✓	✓	✓	✓	

	ACTOR			
	Data Source Administrator	ANDS Client Liaison	ANDS Quality Assessor	ORCA Admin
Edit 'More Work Required' Records(s)	✓	✓	✓	✓
Edit 'Draft' Records(s)	✓	✓	✓	✓
Edit 'Submitted for Assessment' Records(s)	-	✓	✓	✓
Edit 'Assessment in Progress' Records(s)	-	✓	✓	✓
Edit 'Approved' Records(s)	✓	✓	✓	✓
Edit 'Published' Records(s)	✓	✓	✓	✓
Submit record(s) for assessment	✓	✓	✓	✓
Publish 'Approved' record(s)	✓	✓	✓	✓
Mark record(s) as 'Assessment In Progress'	-	-	✓	✓
Approve 'Assessment In Progress' record(s)	-	-	✓	✓
Request more work on 'Assessment In Progress' record(s)	-	-	✓	✓
Delete 'More Work Required' Records(s)	✓	✓	✓	✓
Delete 'Draft' Records(s)	✓	✓	✓	✓
Delete 'Submitted for Assessment' Records(s)	-	-	-	-
Delete 'Assessment in Progress' Records(s)	-	-	-	-
Delete 'Approved' Records(s)	✓	✓	✓	✓
Delete 'Published' Records(s)	✓	✓	✓	✓
Revert 'Submitted for Assessment' record(s) to 'Draft'	-	✓	✓	✓
ADD/EDIT DATA SOURCE SCREEN				
Create data source accounts	-	-	-	✓
Delete data source accounts	-	-	-	✓
Access Edit Data Source screen	✓	✓	✓	✓

	ACTOR			
	Data Source Administrator	ANDS Client Liaison	ANDS Quality Assessor	ORCA Admin
Set 'Quality Assessment Required' flag in data source records	-	✓	✓	✓
Set assessment workflow email addresses in data source records	-	✓	✓	✓
Set 'Manually Publish Records' flag in data source records	✓	✓	✓	✓