2019-08-27 DSpace 7 Entities WG Meeting

Date & Location

27 Aug 2019 at 15:00 UTC (11:00am EST)

Location:

Join from PC, Mac, Linux, iOS or Android: **https://lyrasis.zoom.us/my/dspace** *(Meeting ID: 502 527 3040)*

Attendees

Actual attendee list will be updated after meeting.

- Tim Donohue - LYRASIS
- Pascal-Nicolas Becker - The Library Code **(unavailable)**
- Alexander Sulfrian - Freie Universität Berlin **(unavailable)**
- Lieven Droogmans - Atmire
- Ben Bosman - Atmire
- Paulo Lopes - FCT|FCCN **(unavailable)**
- Mark H. Wood - IUPUI
- Paulo Graça- FCT|FCCN **(unavailable)**
- Jose Carvalho - University of Minho
- Heather Greer Klein - LYRASIS **(unavailable)**
- Dimitris Pierrakos - ARC/OpenAIRE
- Oliver Goldschmidt - Hamburg University of Technology (TUHH) **(unavailable)**

Agenda

#	Time	Item	Information	Who
1	5mins	Agenda	Any additional topics to today's agenda?	All
2	20mins	Entities + Authority Control	Deeper dive discussion into how Entities will work with Authority Control, and how ORCID integration will work (as ORCID integrates with Authority Control). Some useful resources: • Authority Control of Metadata Values • ORCID Integration#Importingexistingauthors&keepingtheindexuptodate	Atmire + All
3		Topic #2	Any other topics??	
5	5mins	Wrap-up and Assigning tasks	• Assign tasks / PRs to review (as needed) • Next Meeting is Tues, Sept 3	

Current Work

Tickets to Resolve

- All JIRA tickets tagged with "Configurable Entities": https://jira.duraspace.org/issues/?jql=project%20%3D%20DS%20AND%20component%20%3D%20%22Configurable%20Entities%22
    - Critical Tickets: https://jira.duraspace.org/issues?jql=project%20%3D%20DS%20AND%20priority%20%3D%20Critical%20AND%20component%20%3D%20%22Configurable%20Entities%22
    - Major Tickets: https://jira.duraspace.org/issues?jql=project%20%3D%20DS%20AND%20priority%20%3D%20Major%20AND%20component%20%3D%20%22Configurable%20Entities%22

PRs Needing Review

1. **(HIGHEST PRIORITY)** (REST) support for defining relationship lookups in the submission forms https://github.com/DSpace/DSpace/pull/2472 **UPDATED** (✅ Tim Donohue - **Will Review Alexander's comments**, Alexander Sulfrian - re-review)
2. **(NEW)** (REST) Rename properties and support for name variants https://github.com/DSpace/DSpace/pull/2488 (Tim Donohue , Dimitris Pierrakos)
   a. related to https://github.com/DSpace/dspace-angular/pull/461
3. (Angular) (Entities) Deleting relationships: https://github.com/DSpace/dspace-angular/pull/402 **UPDATED** (Paulo Graça - ⚠️ reported issues, Tim Donohue - **REVIEW**)
   a. **Has been updated by Kristof** => https://www.dropbox.com/s/kk53ob35urtiryw/schermopname%202019-08-20%20om%2016.11.05.mov?dl=0 (Video of Ben using this PR)
4. (Angular) (Entities) Grid templates for entity types https://github.com/DSpace/dspace-angular/pull/433 (blocked URLPaulo Graça, Alexander Sulfrian , Tim Donohue - **REVIEW)**
5. **(NEW)** (Angular) Rename relationship type properties https://github.com/DSpace/dspace-angular/pull/461 (✅ Tim Donohue, **HAS A SECOND REVIEW)**
   a. related to https://github.com/DSpace/DSpace/pull/2488 (WAIT TO MERGE UNTIL REST IMPLEMENTATION IS MERGED)
6. (Backend) (Entities) DS-4316: Indirect entity refs during csv import https://github.com/DSpace/DSpace/pull/2471 **UPDATED** (Tim Donohue - re-review, Ben Bosman - re-review, Paulo Graça - added feedback)

PRs Merged this week!

1. (Rest Contract) (Entities) Rename properties and support for name variants: https://github.com/DSpace/Rest7Contract/pull/67

Task List

This list was roughly prioritized in the meeting on May 23, 2019 (just before OR2019). The prioritization below may change, but it gives a high level overview of what still needs to be done. *NOTE: Keep in mind, just because an item is listed here does NOT guarantee it will be completed for DSpace 7. Some of these tasks may need to be delayed for a future release.*

1. **(Lieven, Ben, Tim, Fernando, Jose, Mark, Oliver, Paulo)** Submission integration (creating Entities & relations using the Item submission process) - Mockups already created by Paulo previously. - *In implementation*
2. **(Lieven, Ben, Tim, Jose, Oliver, Paulo)** Which metadata fields should be used for each Entity type. (DS-4223). - *In implementation*
3. **(Lieven, Ben, Tim, Mark)** Additional data for relations (essentially "metadata" or labels on relations) - Related to many other features / use cases. - *In implementation*
4. **(Oliver, Paulo)** Author name variants - *In implementation*
5. **(Jose)** Configuration of batch import (via CSV) for Entities - Already a CSV import available, but can only link entities in CSV to existing entities (in the system). Need to decide how to represent relations in CSV. - *In implementation*
6. **(Mark)** Permissions on Relations (who has permissions to add/modify/delete relations) - Currently, if you have Edit permissions on the Entity, then you can edit/delete any relationships to/from that Entity. (**NEEDS DISCUSSION**)
7. **(Fernando)** Deleting objects with Relations (How or should deletion propagate between closely related objects, e.g. delete entire Journal) - Currently, deleting a relation just decouples the two Entities. E.g. If you delete a Person entity, that Person may no longer be listed on any Publications it is linked to (may want to copy info over after deletion). - **Discussed on Aug 6**
   a. Relates to GDPR
8. **(Alexander)** AIP Backup & Restore (of Entities)*
9. Dynamic display of Relations - determine automatically how a list of entities displayed on an Item page (list vs search). Currently hardcoded based on entity type (in item page template). Want to make it configurable/dynamic. (**NEEDS DISCUSSION**)
10. SWORD integration (submission of Entities via SWORD) - Uses same format as AIP. Once AIP is implemented, SWORD should be easy.
11. OpenAIRE v4 implementation using Entities* - Brought up in Steering. Possibly just an OAI-PMH configuration which maps Entity metadata fields to OpenAIRE v4
12. ORCID integration with Entities (for Person Entities). (**Related to #15**)
13. Best Practices around Entities in Collections. We've suggested in the Preview Release to structure Collections based on Entity Type (Person Collection, Projects Collection, etc). We should better document and formalize these best practices. Can we hide these Collections which only serve to store Entity Type.
14. The ability of pick the proper affiliation of a Person for a specific context. DSpace should address this use case to allow the user to describe something like in this document http://repositorium.sdum.uminho.pt/bitstream/1822/46268/1/1-s2.0-S1877050917302788.pdf regarding the authors and affiliations. You have different persons, each can belong to an institution at the time of that publication. The affiliation shouldn't be changed afterwards. And the user should be able to pick the proper one if an Author has more than one. *(PER discussion on July 16, this is lower priority and may be more likely to be implemented in DSpace 8)*
15. **(REQUIRED)** Deeper dive discussion into how Entities will work with Authority Control, and how ORCID integration will work (as ORCID integrates with Authority Control). Some useful resources: (**NEEDS DISCUSSION** - **On agenda on Aug 27**)

   - Authority Control of Metadata Values
   - ORCID Integration#Importingexistingauthors&keepingtheindexuptodate

Notes

- Discussion of Entities + Authority Control
  - Slides / Mockups presented by Lieven
  - Includes a brief status update of Entities in Submission progress (screenshots from active work). Does not include all functionality yet, but has the basics of searching & selecting Entities via a popup module
    - Tim asks if it's time to do an initial PR of this work? Is this a good "first cut"?   Ben will talk to Art
  - Authority Control mockups
    - Cover cases of displaying Authority Control vs Entities, how to make it clear when users are importing from external sources (into either an authority record or Entity)
    - Does not yet cover how to convert Authority Record to Entity (or visa versa), or upgrading authority control (as needed)
    - Basic idea is a single search, but a tabbed view of results... "Local Entities", "Local Authority", one or more external source tabs (e.g. ORCID), and a "Current Selection" tab.

- Tabbed approach was chosen because facets only apply to some tabs & search results are displayed slightly differently based on the source. Also, it better clarifies external sources (which must be imported) vs internal sources
- Also, worth noting that tabs would only appear based on field configuration. If entities is disabled in your system, the "Local Entities" tab would not appear. Same if you don't have Authority Control configured on a field, then the "Local Authority" tab would not appear, etc.
  - All feel this approach is definitely clearer than Authority implementation in DSpace 6.
  - However, End Users may not understand "Entity" vs "Authority" concept. We may need clear documentation / use cases to define why an end user would choose one over the other.
    - E.g. some local policies may decide to have Entities for local staff and Authority Records for external collaborators (who work at a different institution)
    - We may also want to add descriptive hints / tooltips into the UI itself to describe Entity vs Authority. E.g. for People, an end user might want an Entity if they want to create a Profile page.
  - When importing from an external source, user will have option to create either an Entity or an Authority.... also, system will check for existing Entities & Authority Records to prompt you to enhance them instead of creating a new one.
    - Might consider doing something similar to allow transforming an existing Authority into a new Entity. However, that hasn't been fully figure out & other question exist (e.g. when creating an Entity from an Authority, would all relationships be auto-created based on where Authority record was linked?)
  - Overall, all agree this general design is a great first step. We may have areas to enhance / improve on, especially as we do more user testing...but this is a nice design overall.
- Assignment of PRs for this week
  - See updates to PRs Needing Review above.
- Next meeting is next week, **Tues Sept 3 at 15UTC.** Agenda topics are welcome, please send to Tim or mention on Slack (#entities-wg channel)