Repository Tools 2

1. General notes:
   - The Hyrax record replaces the RT1 cache.
   - Therefore, repository/file data is held at Hyrax record level (previously RT1 at object level)
   - Loading publications screen or full text tab will refresh independently of what is queued.

2. Repository-status values to OAM flags
   - Public -> Live (Green)
   - Private (in review) -> In review (Green)
   - Private -> Deposited (not live) (Red)

3. File feedback (on publications page, full test tab)
   - Will display file name (e.g. 'Test deposit.pdf') with no link from text
   - If RIOXX version, displays version e.g. 'AM'
   - On deposit, embargo length is set to 31/12/9999 and will display 'Embargoed'
   - Embargo end date is then set from pub date plus embargo period unless amended or deleted.
   - If embargo end date is in the future, will display e.g. 'Embargoed until 20 Dec 2020'
   - Will concatenate version and embargo status e.g. 'AM, Embargoed'
   - nb. On deposit, embargo release date is set to indefinite (31/12/9999)

4. SE fields used by OAM compliance logic

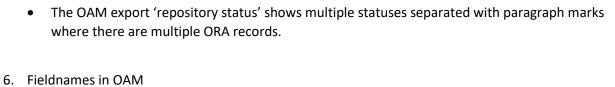| Logic	Output (non compliant reason)	Fields used
1. If there is a Hyrax record *with an OAM override* then stop looking and output nothing.	None - compliant	Override: SE reserved field **is-compliant-with-inst-policy** (n.b. not maintained in Hyrax or crosswalked).
2a. *Is the effective date (DoP/DoA as per policy) missing*?	MissingDateForPolicy	Effective date: SE **publication-date** or SE **acceptance-date** (as per policy settings)
2b. Otherwise, *is the deposit deadline date missing*?	MissingDateForDepositDeadline	Deposit deadline date: calculated from acceptance/publication date as per config (not necessarily the same as effective date used by policy config)
3a. If there are no Hyrax records	ItemNotLive and NoCompliantFileVersion	
3b. Otherwise, look at Hyrax record (each in in turn if >1 :		
4. If the record *has no OAM override*	(Remember RepositoryDecision)	
5. If record is not live (repository status = public)	(Remember ItemNotLive)	Record is not live: SE reserved field **repository-status** != Public (via Harvest

		from Hyrax record_publication_date/ record_review_status
6a. If there are *no compliant files both marked as open-access and of a compliant version (at file level)*	(Remember NoCom1pliantFileVersion)	• Marked as open access: SE **file:is-held-at-source** = true (always set to true by crosswalk if Hyrax record exists) • Compliant version: SE **file:version** (from Hyrax binary_files__file_rioxx_file_version) compliant as per SE config
6b. Otherwise, if *the item is live* (see 5) and *none of the files (of a compliant version see 6b) are out of embargo on time*	(Remember MissingPublicationDateForEmbargoPeriod or EmbargoPeriodExceedsPolicyDeadline) (depending on whether we have a publication date)	Out of embargo on time: (SE reserved field **embargo-release-date** (file level) - **publication-date**) permitted maximum
7. If the *item is live* (see 5) and *there is a deposit deadline which was not met*	(Remember MissedDepositDeadline	Deposit deadline not met = (SE reserved field **record-created-at-source-date**) - effective date < 90 days
8. If we didn't remember anything for this record in steps 4-7	Forget what we remembered and stop looking at records i.e. Compliant	
9. If we have remembered any reasons in steps 4-7 for any records, and not forgotten them in step 8	Output remembered decision(s)	

n.b.:
- Embargo release date only used for calculating length of embargo, not accessibility compliance.
- Blank embargo release date is not interpreted by OAM as indefinite.

5. Display of data in OAM

- The OAM displays Date of acceptance from the highest precedence source that it is available from, if any. Thus, if there is a date in ORA, then uses that date.
- The OAM displays date of publication from the earliest of: the first publication date of the highest precedence source that it is available (if any) and the first online publication date of the highest precedence source that it is available (if any). No? dates from first deposited?
- The OAM displays the earliest deposit date if there are two ORA records.

- The OAM export 'repository status' shows multiple statuses separated with paragraph marks where there are multiple ORA records.

6. Fieldnames in OAM
   - Are unchanged form RT1

To test:
When does version and embargo comethough.

7. Fields for RT2 testing

SE Field/data name	Used for	Type	Object/ Record/ file	Harvest	Deposit	REF Label	Notes
ref_compliant_at_deposit	OA Monitor logic	Field (reserved)	R	N	N		Hyrax Override
publication-date	OA Monitor logic	Field	R	Y	Y		
acceptance-date	OA Monitor logic	Field	R	Y	Y		
repository-status	OA Monitor logic	Field (reserved)	R	Y	N		
embargo-release-date	OA Monitor logic	Field (reserved)	R>F	Y	N		
record-created-at-source-date	OA Monitor logic	Field (reserved)	R	Y	N		
is-open-access	? display	Field (reserved)	R	N	N		
file:url	Operations (display of file link?)	File metadata	R>F	Y	N		
file:version	OA Monitor logic	File metadata	R>F	Y	N		
file:is-held-at-source	OA Monitor logic	File metadata	R>F	Y	N		
Exceptions	Operations (compliance)	OA data	O	Via API	?		
public-url	Operations (display of ORA link)	Field (reserved)	R	Y	N		
oa-location-url (file level)	Operations (deposit)	Field (reserved)	R>F	?	?		Not enabled
oa-location-file-version (file level)	Operations (deposit)	Field (reserved)	R>F	?	?		Not enabled
external-identifers	REF submission	Field (data part)	R	check	check	webOfScienceIdentifier	Field data part
Object.type	REF submission	Field	R	Y	Y	OutputType	
title	REF submission	Field	R	Y	Y	Title	
location	REF submission	Field	R	Y	Y	Place	
publisher	REF submission	Field	R	Y	Y	Publisher	

parent-title	REF submission	Field	R	Y	Y	VolumeTitle	
volume	REF submission	Field	R	Y	Y	Volume	
issue	REF submission	Field	R	Y	Y	Issue	
pagination	REF submission	Field (data part)	R	Y	Y	FirstPage	Field data part
number	REF submission	Field	R	Y	Y	ArticleNumber	
isbn-13 (isbn-10)	REF submission	Field	R	Y	Y	ISBN	Requires logic
Issn (e-issn?)	REF submission	Field	R	Y	Y	ISSN	Requires logic
doi	REF submission	Field	R	Y	Y	DOI	
number	REF submission	Field	R	Y	Y	PatentNumber	
publication-date/start-date	REF submission	Field (data part)	R	Y	Y	Month	Field data part
publication-date/start-date	REF submission	Field (data part)	R	Y	Y	Year	Field data part
tbc	REF submission	Field	R	Y	Y	URL	SE field tbd
tbc	REF submission	Field	R	?	?	IsPhysicalOutput	SE field tbd
tbc	REF submission	Field	R	?	?	MediaOfOutput	SE field tbd

1 November 2019 (after call with S Ltd)
Updated 18/11/2019 (S Ltd ticket 240083)
Updated 20/11/2019 (tidied)