**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.

1. Which data source is used on deposit to ORA?

The crosswalk doesn't take data from a single source (be it manual or highest precedence) but selects source to use on a **field by field** basis (a bit like the OAM works through sources to find the publication date). Hence if the lowest precedence source has a field value that none of the other sources do, then it will be crosswalked. It also seems that pub date takes the most granular over a less granular even where it is a lower precedence. 1) Have I interpreted this correctly and 2) were we aware of this already? Will test further.

1. Repository-status values to OAM flags
   * Public -> Live (Green)
   * Private (in review) -> In review (Green)
   * Private -> Deposited (not live) (Red)
2. 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)
3. 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.

1. 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.

1. Fieldnames in OAM

* Are unchanged form RT1

To test:

When does version and embargo comethough.

1. 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)

Updated 15/06/2020 Which data source is used on deposit to ORA?