EASi Admin Meeting – March 20th 2013

**Agenda**

To clarify what has been agreed and to address some outstanding questions regarding the integration of EAS with DRS2

**Billing Code**

Assign billing code from packet/collection to all items at packet submit time.

Agreed.

Billing code will be mandatory for the packet.

Agreed.

Collection should now be optional at packet submit time.

Agreed.

Should we make the billing code mandatory for items at packet submit time (this would simplify the user interface)?

Agreed – with the following behavior:

On packet submit, if a collection is assigned to the packet, the collection billing code is also assigned to the packet and all the items in the packet. Otherwise a billing code must be manually entered for the packet and it is assigned to all the items in the packet.

**Packets**

Packets will not be deleted from EAS. The only modification to packets in EAS will be the association of delete events with the packet.

Packets will be pushed to DRS when the first item from the packet is pushed to DRS.

Any modification to, deletion or restoration of packets via DRS Web Admin will not be reflected in EAS. There will need to be a “Best Practice” which advises users to not manipulate their packets via the DRS Web Admin while they are being actively used in EAS.

Agreed.

Packets may be modified, deleted or restored in DRS via DRS Web Admin, like any other object.

If a packet has been deleted from DRS and an item for the packet is pushed to DRS – this will result in an error. Ideally this error message should indicate how much time the user has before they will no longer be able to restore the packet. This information can be obtained by retrieving the packet object from DRS and parsing the result.

In order to push the item to DRS the user will need to restore the packet in DRS via DRS Web Admin (they have 2 months from the time of deletion before they can no longer restore the packet).

After the 2 months are up – the packet will need to be ingested as a new packet (it will have the same OSN). The user should be warned that “Continuing to deposit will create a new packet in DRS”. Previously deposited items will lose their association with this “new” packet. All the packet level events for the packet (including those previously written) will need to be written to DRS along with the new packet. This means that EAS will need to retain all packet level events until all items have been written to DRS or deleted from the packet.

**Items (email messages and email attachments)**

Should the collection be optional for items – so that items may be pushed to DRS without having been assigned to a collection? If not, then if items have not been assigned to a collection at “push to DRS” time it will result in an error.

Agreed to make it optional – but to warn users if there are items not associated with a collection. Ideally let them decide to continue or not.

An item may only be pushed to DRS along with all its associated items (email and all its attachments) in order to maintain item level delete events (these can not be maintained across the two systems).

Agreed – and it should be done automatically.

Once written to DRS, items will be deleted from EAS.

Agreed.

Items may be modified, deleted or restored in DRS via DRS Web Admin, like any other object.

A new DRS user story was brought up – the ability to bulk edit relationships.

DID NOT COVER COLLECTIONS – assignment of billing code to items still an issue.

**Collections**

Collections will be created in real-time in DRS via the EASi Create Collection screen.

Only the collection title and identifying information will be stored locally in EAS.

In EAS, events will no longer be associated with collections.

Updates to collections will update DRS in real-time via the EASi Modify Collection screen.

In EAS, updates to the title will involve updating the EAS database, Solr index and DRS. In EAS this will update the collection title in Solr for all the associated items since users search/sort items by collection title.

EAS will poll for updates to collections in DRS soas to pick up any updates to the collection title. Frequency?

Collections may be deleted from EAS if they have no associated items. Deletions of collections via EASi will also delete the collection from DRS. To accommodate the restoration of collections (functionality DRS provides) the collection will be marked as deleted rather than physically deleted.

Collections may be modified, deleted or restored in DRS via DRS Web Admin, like any other object.

Collections may be deleted from DRS via DRS Web Admin. There will need to be a “Best Practice” that users should not delete collections that are being actively used in EAS since DRS cannot check EAS to ensure no items have been associated with it.

EAS will poll for deletions of collections in DRS. If a collection has been deleted in DRS which still has items in EAS – what is the best way of handling that? Should the EAS contact for the collection be emailed that there is a conflict?

Should the “restore” functionality be included in the EASi Modify Collection screen?

EAS will poll for restorations of collections in DRS.

**Packet Level Events**

Packet level delete events will be written to DRS along with the packet when the first item from the packet is “pushed to DRS”.

Agreed

After the packet has been pushed to DRS the delete events will be created locally in EAS and written to DRS on a schedule.

Agreed

Events in EAS are not modifiable.

Agreed

Once written to DRS the packet level delete events will be deleted from EAS.

No. They should be marked as deleted and retained in EAS. Only when the last item has been deleted/written to DRS should the packet level delete events be deleted.

DRS Web Admin will be used to view the packet level events in DRS.

Agreed.

The EASi “Process History” screen will be used to view the packet level events which have yet to be written to DRS.

No. All the packet level events should be displayed, with those already written to DRS displayed differently. Once all items for the packet have been written to DRS/deleted the packet level events for that packet will no longer be displayed in EAS.

There will be a link from the EASi “Process History” screen to the new DRS Web Admin “Object History” screen. Clicking on this link should display the history for the current EAS packet.

Agreed.

Once written to DRS, packet level events in DRS may have their notes modified via the DRS Web Admin like any other events in DRS.

Noted.

**Item Level Events**

In order to maintain item level delete events all associated items (email and all its attachments) will be pushed to DRS along with their events in a single batch.

Agreed.

Events in EAS are not modifiable.

Agreed.

Once written to DRS, item level events will be deleted from EAS.

Agreed.

Once written to DRS, item level events in DRS may have their notes modified via the DRS Web Admin like any other events in DRS.

Noted.

**Descriptors:**

What are the acceptance criteria for the descriptors? Who will verify that they are correct?

Descriptors should be verified by Robin and Andrea.