

## **SW Arch Meeting Minutes – December 04, 2014**

### **Agenda**

- Announcements and Updates
  - DOI/HDL update
  - Updates in the Archive CM and requirements for netID/IP restrictions
- Specification for converting techMD from inline to managed
- Specification for faceted searching
- Release R7.6 discussion
- Inventory of crons (postponed for the next meeting)

### **Announcements and Updates**

We had a very successful run for updating resources with HDLs to DOIs. Of 822 in the first batch, 819 were assigned DOIs and the remaining three already had DOIs. Per CISC reviews, the requirements for the Archive CM and netID/IP restrictions had minor updates. For the CM, access from the persistent URL will be open and we also added another class of archives, i.e. those materials that are not likely to ever be publicly available. It was also noted that the Archive CM will basically allow any file type for the archival master. Regarding the netID/IP restrictions, we agreed not to implement the “restrict by search engine discovery” and also noted that we will need a policy document describing our rationale for various restrictions. Rhonda and Ron will update these documents and we will proceed with implementation specifications for the netID/IP restrictions.

### **Converting techMD from Inline to Managed Datastreams**

Jeffery reviewed the preliminary specification for undertaking the conversion of techMD datastreams. The major issue was how to preserve the original ingest date for the datastreams. Jeffery will investigate to see if the date can be forced on the datastream attribute. If this approach does not work, we may have to proceed with a file level edit. Jeffery will report on the investigation in our next meeting.

### **Specification for Faceted Searching**

Chad reviewed the specification for faceted searching. The group noted that this feature is in great demand for many of our major portals. Chad described the various configuration options that can be set up for the portals that use facets. These options support the many ways a user can organize and display facets.

With minor updates, the specification was accepted and will be implemented in R7.6. We also discussed several issues related to SOLR indexing. For example, special SOLR variables will be needed to convert text for quantities such as weights in the Coins portal (e.g. 2.1 G) to a numeric value that can then be used for interval searching (e.g. give me all coins with weights between 1 and 3 grams). We will

also need to declare string variables for those fields that have multiple terms. It was suggested that we proceed with setting up faceted searching in a few portals in R7.6 (VMC, Coins, Maps) and then establish standards and guidelines in our efficiency release (R7.8).

### **Continued Discussion Releases and R7.6 Priorities**

Regarding our planned renaming of servers, we decided to separate the naming of the servers from the display URL. The development requirement is to insure that “RUcore devel” and “RUcore test” are properly displayed in the URL. Dave can use server names that are most appropriate for his needs.

We continued the discussion of R7.6 priorities. For R7.6, we added WMS custom form enhancements. The target dates from last meeting will be retained, i.e. specifications complete by January 16, 2015; code freeze – April 6; and public release on May 18, 2015. Given the specifications that are already underway, the group was reasonably confident of completing the specifications by January 16. For the release summary, we will retain the priority numbers from the last CISC review with a note that these priorities need to be revisited in the next CISC discussion.

### **Inventory of Crons**

Chad reviewed the list of crons that are run periodically (daily, more than once a week, and weekly). The discussion helped clarify for the group some of the more subtle issues regarding signature checking and SOLR indexing. We will continue to update this document as we add new crons. Dave will create a new mellon/crons directory where we will locate the crons that are relatively independent of other directory associations.

### **Agenda for Next Meeting (December 18)**

- Revisit - converting techMD to managed datastreams (Jeffery)
- dlr/EDIT policy and authentication (Kalaivani, Ron, Jeffery)
- WMS 1:1 policy update (Isaiah)
- Specification for handling PDF deposits that have been restricted (Isaiah)
- Pending
  - WMS custom form enhancements
  - NetID/IP restrictions
  - Decommissioning the HDL server
  - Updating xacml policies (per Chad’s investigation)