

# InvenioRDM - Mockup Discussions

**Tuesday Jan 21 2020**

Here are the notes from the facilitated mockup feedback sessions. For each mockup page (Record, Deposit, Uploads and Search) feedback, questions, comments, complaints, ideas... are listed with a summary as well. Each Page is given its own space below.

## ## Record Page

- Like the citation highlighted
- Wondering if custom metadata going on top - make details collapsed
- Wondering difference between taxonomic treatment and keywords
- Preview and files should not be displayed
- I like the two columns (content vs statistics)
- The DOI should be better seen
- I like the admin navigation panel and wonder if that quick navigation is a stragy for a common user
- I'm wondering if the all the metadata is a fixed view if we can change the order for some type of visitors.
- Can we change the order of the preview / details easily per community
- I don't like to scroll - can we have tabs to lower page length
- Different kind of view for metadata to see internal names
- Is DOI badge for the specific version of all verisons
- Data coming from different organisations to clearly show the organisation logo (if you have data coming from different org).
- Can we have more usage of the screen to have more content on the screen
- Feature request: export a basic report about statsitics for a spoecific report.
- Stickly menu for the navigation menu
- It should be possible to select by the user the file that is previewed.....
- I like the authors / affiliation - what if I have more than one ID (what happens then)
- Metrics: Is it the right place - what if I want some other information (can I easily customize it).
- Related identifiers should go higher or right side, because you can use it for navigation

- If it has many files, the user be able to select how they can be downloaded (export all or subset of files).
- It would nice to have a configuration file to have custom fields translated and a popup that explains the field
- Interactive way of exploding the JSON\
- I'd like a clarification about the first line of people (are they authors).
- Having something better way of display the contributor roles (e.g. tabular form).
- Admin view: add in the bottom an accordion in the bottom with the raw json
- I would like to copy the DOI directly (make it easy to copy the DOI).
- The description can be very long - so having an elipsis to reduce page length for long content.
- I would like to have a "reproduce button" ie can I customize it,.
- Can I choose only the fields I want to export?
- I'd like to see information about priviledges and who is the curartor of the records. (do I have read-only permissions). Contact the curator or author
- Can I have different previewers.
- Can I have HTML rendered - and if there is hyperlinks in it, can we process them.
- I wonder what is the citation information is for - how can I export it to a reference manager easily?? (confusing an easy export)
- Feature request: Keywords - I would like to use natural language processing to assign keywords to help the user - and on landing page I would like to see if ther keywords are from vocab and come from a user or system
- Details: when we have more details, I would like to group them thematically
- I would like to download multiple files at once 0- x
- What do send message do - send to all authors, a specific person - where does the message go?
- You should be able to customize the underlying logos.

- Can I select one of the files as the main preview.
- What is the "report button" for?
- The metrics are for the records - but can I also have metrics for the file and being able to export in a report.
- Send message: it's not clear to me that I can contact the authors (issue with who to contact)?
- I have 100 images, but it's all one book - would the previewer work in a nice way so that when you click preview button it works nicely.
- How would the page look like for restricted access?
- Can I have different layout per different community for records?
- When you download only 5 out of 10 files, then it should be clear in the downloaded zip is not complete (add a file to mention the record).
- Should all of them not have a disclaimer \
- It would be nice to expand/collapsed - and a simplified view/advanced view.
- Does the previewer have a full-screen option
- Previewer could highlight the previewed file, and a button to navigate to go to next/prev file for preview
- Can the search bar search only BLR or global search.
- Which community is the page related to.
- The 10 files: the dump of all files should be a standardized format.
- Random request: Put a hash on the page, so that people can see that the entire dump is actually valid.
- If content have restricted: is it possible to water mark the content, and add information for the specific content, or digitally sign the file for that specific user
- Can I have a file hierarchy on the upload page.
- Contact button: Send message -> Contact record representative (I would love to see the info button - to contact the data steward).
- It's not clear what the plus do next to the logged in user,.
- I would like to brand more the page for the community
- Different background for the whole page. (template vars)
- Layout customization: Can I move boxes around?

- If restricted access, can I choose to show only some information publicly.
- The 10 files: Is there latest version of files.
- Some files are not previewable - can I define a standard thumbnail for the preview icon instead of a button.
- License: is there a rights framework behind it? The user can pick which rights they want.
- Question for conversation: I wonder if there's value in knowing the completeness of the record (e.g. 85% complete record),
- How are the thumbnails generated - it would not make sense for most of the files
- I want a commenting feature in the page.
- Can you have groups inside communities - it should be clear what group the record belongs to.
- When you browse for revisions - there should be a way to see the differences.
- Can I have a rating system (3-4 stars for document).

Summarize

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Group 2

- Keywords - tags, or what
- I'm confused and keywords/.citations before the other information
- How long is the authors going to be
- This is a very repository list of files - I'd like to see checksu
- I like the authors clearly - the citation
- I'm confusing about the contributors
- I don't understand what the send message button do - who?
- I'm curious if the grant numbers can be more discrete
- The export could be hidden in a drop down (consistent with search export)
- The license should be located near the top
- Citation -> How to cite

- It looks messy with a lot of information without clear structure
- I'm curious what the other dates could be?
- I don't understand if the preview button is linked to the preview
- It's not clear if preview box is for which file? What is being previewed!
- Cases are associated with the file instead of the record
  - Sensor vs processed
- How does it look like if there's a 100 files
- What is the expected behaviour when you click author / orcid link
- If you have a lot of authors - I have to move the eyes a lot to see their affiliations
- If I click through the citation styles, does it update live on the page
- How do I go back to my search results
- Public record: The contributors are very hidden (should be more prominent)
- How do I translate the page to norwegian
- How many other places can your record be indexed and how do I control it
- Issue with branding top bar - people are missing
- If I'm the owner, can I edit in place or do I go to a different screen
- Which community is the record part of?
- It's confusing to have Published in part of.
- Can I save the record to a reading list
- Should it be Powered by InvenioRDM or Invenio (branding thing)
- What happens if the record has no file - does it disappear
- If I save this record in a bookmark list, can I share it with someone
- As administrator of the site, can I control the order of the details page
- Can I adjust the labels for metadata fields (if I have different opinions on keywords/subjects)
- Is the term linked to a definition elsewhere
- Edit / New version / Replace files / Delete
  - Edit metadata is confusing - be clear about terminology
  - Replace files for the current version

- Navigation links in top (jump to)

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#### Summary:

- Information overload: ideas for reducing clutter
- Customization by resource type, community
- Files and previews; features, download all, select previewable file.
- "Send message" - what does it do?
- Community bar not visible and understandable
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## ## Deposit Page

Questions - Monday Jan 20 2020

- What is data collector role? Using Datacite vocab?
- Implications for search of marking a record private? (files?)
- Way to have dependencies between fields in the UI? E.g. resource type selection sets (default) embargo date/duration
- Is versioning tied to access control? (what happens to previous versions that differ in access control?)
- End-of-life date for private records? (i.e. is there an automatic purging system?)
- Can one specify the storage technology (class) (e.g. tape)?
- How is Datacite reacting to passing HTML in (description) fields?
- If one chooses "only metadata" record type, can files be added later?
- Is there a "sherpa" to guide selection of license
- Can external files be associated with a record (metadata here but data there?)

Summary:

- Access control and its implications generate particularly many questions

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Group 1

- People: Matt (NU), Stefanie, Alex, Tubitak, Geo (2), JRC, TUGraz, Germany, Zenodo (alex),
- Is this community based approach?
  - Community leader can decide the field and the order to reflect its community for deposits (Geo)
- Overwhelming:
  - Red: mandatory
  - Recommended filter to only show what is recommended +1
  -
- Resource types:
  - Change the fields depending on what you upload (resource type)
- Foldable is nice +1
  - Could what is minimized be decided by community
  - Added metadata for the instance
    - How easy to make changes
- What is basic and what is community specific?
- Inline help for each field and section



- Help for specific
- Author disambiguation
  - ORCID...
  - Autocomplete for author
- Resource type inform the fields
  - E.g. clinical trial -> gets those fields to show up
  - Also embargo time : change the embargo time within set time
- DOI prefix
  - Select which DOI prefix for your community
- FAQ
- Contributors:
  - Search for existing contributors (in system)
  - Or hooking up to LDAP
  - Or creating new contributors
- Who decides the added metadata?
  - Community manager? Is more appropriate according to other member
  - Can you add them on the go when you create?
    - If user can decide: chaotic..
- Resource type is not enough to make dependent fields
  - Community is not enough for dependent fields
  - Problem: too many templates if too flexible, not flexible enough doesn't help
  - Solution: ETH: create from a predefined template from a selected list of template
    - How form looks like malleable by instance admin (curator)
    - -> social solution + more access control needed
- Subjects:
  - Autocomplete: add keywords that are user generated (own tagging system)
    - Make it clear it comes from human
- Gamification:
  - Badges, leaderboard
- Access control:
  - Access could be given at field level for record
  - Different access control for files
- Form layout:
  - Modal for each section
  - Color codes: for part that are not finished
    - Impact my uploads search
    - Save a draft of record completely incomplete +1 other person
- Contact me:
  - More flexibility in communication:
    - Enter person or entity for contact
  -

- For additional metadata fields:
  - Can be made mandatory
- Could you share your draft with people?
- 2 levels of visibility to fields:
  - Checkmark section for 2nd level
  - Permission second level
- Sharing:
  - Confusing effect on search: difference between sharing and access control?
  - If curators go away, what happens? Managing turnaround is perceived to be problematic.
    - Ways to automate turnaround
    - Talk to a role rather than a person
  - Within and outside the facility
  - Communities:
    - who defines them? (per instance?) Is it possible to create new communities +1
    - Access for them
- Autosave: + saving time
- Field search in the form to find the field
- Sharing dropdown of same size
- License for different files

## Group 2

People: Euro JRC, Estaban for Hamburg, INFN +1, Hamburg, TUGRaz, Treccani+1,

- Different deposit page for power user
- Sharing with communities what does it mean?
  - Document of community / not same as sharing with people
- Publish box
  - Danger zone!
  - Only show publish when required fields are filled
- Mandatory fields for different communities
- Contact me // access control?
- Private : what happens when contact me
- Is storage good thing to show user // not clear
  - Limit ?
  -
- Save even if mandatory fields not filled
- Select a template for the deposit
- Public / Private + only internal to organization
- Access right and doi (persistent id):
  - Mint doi for private record: no

- Difference between curator and admin?
- How do you fill the location long/lat?!
- Inline help + customizable for community
- Make a record private : worried about the index
- Subjects == Keywords
- Files:
  - Detect already been deposited: allow, but only store once
- Version control on upload?
- Checksum
- Location: extracted automatically from upload
  - location?
- Publish: what does it mean if the record is private?!
- Run background task on uploads
  - Depending on communities perhaps
- Files:
  - Sorting the files
  - Select which one previewed
- Title:
  - Many titles?
  - Edit:
    - should there be fields not editable...
    - Some information would create new record e.g. title
- Save and not publish
- Files:
  - Privacy/access control per file
  - Request quota increase
- Auto save
- Preview landing page
- Terminology
  - What does deposit page : create / edit
- Location: polygons / bounded lines...
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### Highlights:

- Prefilled / defined templates to select / use
- Different fields per template / resource type / community
- Difference between access control sidebar and sharing sidebar
- What are the effects of sharing on access control?
- Per file access control + per field access control
- Auto save / preview
- Help across fields



## ## Uploads Page

- First round: No one :(
- Second round:
  - HZDR, Carlos, CERN (Steffani)
  - Wants to see a summary: how many files, how many views, how many drafts etc. aggregated stats. I is somehow shown on the facets, but a better dataviz would be nice.
    - How many reads
    - How many hits (searches it appeared)
    - Side notes: citations icon was pointed as “comment”.
    - How many comments on the record (Shall we allow comments).
    - Know in which communities can be found. E.g. if I publish this records, which communities will it be in (e.g. which ones are there by default).
    - Know which searches will hit my record (e.g. which keywords).
  - Personalization of the dashboard
  - Search for specific metadata fields (custom) appart from filters
  - Advance search over other parameters (e.g. show me all that parameter X is greater than 30).
  - Search with AND/OR combination.
  - Order of resource types, etc. Alphabetically helps finding.
  - Snippet of code in the bottom that shows you how to do it programatically. E.g. form a help button.
    - A way to tell users that there is an API. They might not know and it might be useful for them.
  - Cloning already created deposits, e.g. it might be super similar but not the same, so it will help to start creating if its a duplicated from another.

- Back-up all your information. Export all your records (with some formats etc.) Bulk export from the selected records and from all of them.
  - Give a sense of completeness. E.g. display a summary of what has been backup in case something was missing.
- Facets are shown based on logical groupings, e.g. if the resource type is a dataset it can show a “size” facets. This is more for search.

#### SUMMARY:

- **Aggregated statictics:** How many views, citations, downloads, etc. Of all my work.
- **Show in which communities is my record at**
- Need to **back up** my information. E.g. bulk export. **Completeness** matrix
- Dynamically **logical groups of facets**
- **Cloning records** to start a new submission (deposit) many common fields
- Some sort of “**help**” **snippet** in order to show users that there is a API

## **## Search Page**

### **Notes from Monday 20/01/2020**

- Keyword searching  
([ICPSR](https://www.icpsr.umich.edu/icpsrweb/content/ADDEP/data.html) Michigan) (easy keyword prefilling search?)
- Not Updated facets -> not expected results (Clicking on 2 facets end to empty results)
- Quick clear facets button
- Add some search tips for advanced search?

### **Group session 1**

- Keywords -> controlled vocabulary?
- How to present huge amount of keywords -> Search autocomplete keywords
- Length of keywords -> how numbering will be shown
- Advanced search apply sophisticated filters
- How you clear the search (already applied query, facets, filters)
- Search results -> more titles and less abstract (Less detailed result)
- Switch layout -> thought to switch the amount of information presented
- Read more button for abstract (EXpand the abstract)
- How will be presented if I change to see all versions (what if a record has a lot of versions ? see only that one?)
- Probably bind all different versions in record result ?
- Show numbers of versions -> on click search for these versions
- Don't understand how versions will be presented
- Probably configurable to use versions or not?
- Publication date facet should be updated on each facet (and in general)
- Instead of filter for versions -> show latest but indicate how many versions exist
- Different presentation of results based on resource type (maybe?) -> Customize the result based on different factor
- Facets are applying and or or ?

- Save search results/ able to share?
- Go to the end page probably not useful (use the sort function)
- Not clear what the plus sign means
- Search order -> order on title (A->Z, Z->A) instead of ascending/ descending
- Probably asc/desc on first author
- Indicate community info on search result
- A lot of concern on the amount of keywords and how to present
- Support decade facet dynamically based on your range of results
- Nice placeholders for each resource type if no thumbnail presented
- Pagination should be the same top/bottom
- Bottom pagination only on scrolling down
- Doubt if top pagination is useful
- Indicate if a record has files
- Download file directly from the view

## GROUP 2

- Save search results under link/name or profile
- Facets: last day/last week/last month
- Author manages the top x publications and be shown as top results(promotion point to have author page nicely done)
- Indicate if files in the record and quick download button
- Indicate which community the record belongs
- Select the results I want to export(current ones)
- Export also current facets metrics for the current query apart from the results
- Export should have a warning if there a lot of results just to inform user about the amount that will be exported
- Big amount of info in result(authors, keywords, abstract) how will be presented, how can be restricted. Use expand options
- See the identifier id of the author so I can click and see author's profile
- Autocomplete popular searches
- Search docs on search syntax(How to search page?)
- Quick change of language per page



- Publication language results
- Clear button on search

## GROUP 1 SUM

- Facets: How will be presented if huge amount, how they will be populated, every facet should be updated in each facet applied, and/or on search?
- Result templates: Customize search result (e.g for resource type), Diff placeholder based on resource type(if thub not presented), community indicator, **file indicator/download files**
- Order: a-z/z-a more human readable, asc/desc based on primary author
- search: Sophisticated advanced search filters
- Not clear what plus sign does
- Versions filter confusing..Probably show latest results plus number of versions(on click search all the versions of this record)

## GROUP 2 sum

- Facets: last day/week/month, publication language results
- Results: file indicator/download, how fields with possibly big amount of information will be presented(e.g authors, keywords, abstract). Maybe some expanding options.**Community indicator**, Author id pointing to profile page
- EXport: results plus facets metrics and stats, select from the current search what will be exported
- Search: autocompleate popular searches, save queries under a named link/profile to be able to be shared. How to search page. Clear button results

## Total sum

- Facets
  - How will be presented when big amount of facet(e.g keywords) -> autocompletion?
  - Every facet should be updated every time a facet is applied
  - Indicate if facet applies “and”/ ”or” operand in the results
  - Suggestion: Publication language facet, last day/week/month, decade facet based on current records on the system
- Results:
  - File indicator + quick download button
  - Community indicator
  - Customized template (e.g based on resource type, community)
  - Hide/expand options for record with big amount of data (e.g abstracts)
  - Authors’ identifiers link a profile page
- Export
  - Results plus facets metrics
  - Select what to export from current results
  - Apart from exporting save/share results
- Search
  - Autocomplete popular searches
  - Save search results/ able to share
  - “How to search” page showing information about search syntax
  - Clear search query/filters/facets button
  - Sophisticated advanced filters
  - Save queries under a link that could be shared
- Order
  - More human readable text for asc/desc like a-z/z-a
- General
  - Plus button not understandable what is it doing
  - Versions a bit confusing on how will be presented if record has a lot of versions.



## Community Creation Page

### Group 1

- Custom metadata for community UI, where?
- How to relate a community to another
  - Associated community to created communities
- Email should be agnostic / not shown (e.g. css)
- Community hierarchy in some sense (2 different people in support)
  - Private communities within community
- Request a community:
  - Prevent fragmentation of community creation
  - Not as much a problem for library bc of mediated deposits
- Are communities available through OAI-PMH / how do they interact with it
- Lifecycle management of community
  - Can they change name / can users define identifier
  - Deprecation notification
- Bulk upload of members in community
- Create community from existing one ("clone from")
- Separate out the customization via an advanced section
- Want more than 1 owner assigned to community
- If community is private, are records searchable (2 people)
  - Community: too much fragmentation
- Have multiple links
- Tabbed interface for creation of community
  - Tab: members
  - Tab: metadata
  - Tab: advanced
- Admin <> curator different
- Community is private / public confusing
  - Difference with how can one join
- What happens if uploaded to wrong community?
- What type means?
- Controlled vocabulary for domains so standard
- Want Description of community
- Curation policy?

## Group 2

- If type: institution/organization, what does it mean to select organizations below (3 people)?
  - Create / request?
- Collections missing in form
- Relationship between communities and resources: many to many?
- Community used as access control list?
- Which fields are mandatory?
  - Public email is good
  - Are all these fields public facing / which ones are?
- What can you actually upload ? details?
- Hierarchy of communities
  - Hierarchy of collections
  - Best practices / definito
- Access right on collection level too
- What does a collection mean?
  - Sub-community or sub group
- Domains / Subjects / Keywords : has to be same vocab
- Who is updating the list of organizations? Where does it come from
- What is identifier? Is it unique ? Is it auto-generated?
- Is it DOI?
- Could we attach a file to community?
- Confusion about curation / upload process?

## Conclusions:

- Hierarchy of communities
-