

RepoExec IR Subgroup Report - 2015-10-16

Summary report of features and policies needed to support the institutional repository user stories identified by the IR User Stories Working Group. Prepared by the RepoExec IR Subgroup. This report is intended as a resource to help guide the continuing development of a Sufia-Hydra based IR solution for Cornell University.

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1 Methodology

Each user story from the the IR User Stories Working Group report was interrogated to determine which features and policies would be necessary to support that user story. This method resulted in a list of features and policies, which were then prioritized as **Critical**, **Major**, or **Low**, using the following criteria:

- **Critical** - This feature is a core function of the repository, absolutely necessary for its operation. Reasons a feature is considered **Critical** include but are not limited to:
 - many user stories rely on the feature
 - funding or institutional obligations depend on the feature
 - a significant minority of users rely on the feature
 - repository experts aver that it is necessary
 - stakeholder buy-in depends on the feature
- **Major** - While this feature is not necessary for the repository to function, it is considered important to its operation and use. Reasons a feature is considered **Major** include but are not limited to:
 - a fair number of user stories rely on this feature
 - a small but involved constituency of users prioritizes this feature
 - potential stakeholder buy-in or funding opportunities may arise if this feature is implemented
- **Low** - This feature would be good to have, but is nonessential. Reasons a feature is considered **Low** include but are not limited to:
 - only a small segment of users rely on this feature
 - considered to be a niche or tangential repository function

This prioritization allowed us the determine an inferred priority for each user story: the lowest of the priorities of the features and policies that it relies on. This allowed refinement of the features and policies list, and their associated priorities.

2 Features grouped by priority

2.1 Critical priority features

2.1.1 Feature: Collection homepage (IRS-126, Critical)

In order to support collection access and linking we need all collections to have a browse page with a clean and persistent URI for copying/linking.

Is related to: IRS-144

Is relied upon by: IRS-1, IRS-27, IRS-40, IRS-102, IRS-106, IRS-107

User story groups: Branding, Access & Delivery, Accessibility, Maintenance

2.1.2 Feature: Persistent and clean repository item URIs (IRS-127, Critical)

Each item should have a persistent and clean URI to allow easy reference. This should be the URI that appears in the users browser bar.

Is related to: IRS-149, IRS-213

Is relied upon by: IRS-2, IRS-21, IRS-34, IRS-82, IRS-118

User story groups: Branding, Access & Delivery, Interoperability, Accessibility, Preservation

2.1.3 Feature: Metadata can contain actionable link (IRS-130, Critical)

Metadata can contain actionable links that will appear in the interface as HTML links. Details of this feature, nature of link, need to be fleshed out. This will handle external related content.

Is related to: IRS-179

Is relied upon by: IRS-3, IRS-17, IRS-46

User story groups: Access & Delivery, Discovery

2.1.4 Feature: Accepts datasets (IRS-131, Critical)

Questions: Typed as dataset? Minimum or special metadata? File size limits? Download type?

Is related to: IRS-147

Is relied upon by: IRS-3, IRS-23, IRS-38, IRS-39, IRS-79, IRS-81, IRS-86

User story groups: Branding, Access & Delivery, Interoperability, Accessibility, Ingest

2.1.5 Feature: Self-upload (IRS-132, Critical)

A creator can upload their own material/works to the repository.

Is related to: IRS-134

Is relied upon by: IRS-3, IRS-22, IRS-23, IRS-24, IRS-34, IRS-38, IRS-63, IRS-67, IRS-76, IRS-78, IRS-79, IRS-86, IRS-94, IRS-117, IRS-216

User story groups: Branding, Accessibility, Preservation, Access & Delivery, Interoperability, Ingest, Maintenance

2.1.6 Feature: Authentication and authorization (IRS-133, Critical)

Groups of user of interest, including: Cornell faculty, library staff, etc.

Is related to: IRS-159

Is relied upon by: IRS-3, IRS-19, IRS-20, IRS-21, IRS-22, IRS-23, IRS-26, IRS-27, IRS-28, IRS-29, IRS-30, IRS-31, IRS-33, IRS-34, IRS-35, IRS-37, IRS-38, IRS-40, IRS-43, IRS-47, IRS-53, IRS-54, IRS-56, IRS-63, IRS-64, IRS-65, IRS-66, IRS-67, IRS-68, IRS-69, IRS-71, IRS-72, IRS-73, IRS-74, IRS-76, IRS-77, IRS-78, IRS-79, IRS-80, IRS-83, IRS-89, IRS-92, IRS-94, IRS-95, IRS-96, IRS-97, IRS-98, IRS-99, IRS-100, IRS-103, IRS-105, IRS-106, IRS-107, IRS-113, IRS-122, IRS-216

User story groups: Branding, Accessibility, Ingest, Sustainability, Access & Delivery, Interoperability, Preservation, Maintenance, Assessment, Discovery

2.1.7 Feature: Mediated upload (IRS-134, Critical)

Material can be uploaded to the repository by an authorized user who is not the creator of the work.

Is related to: IRS-132

Is relied upon by: IRS-19, IRS-24, IRS-64, IRS-66, IRS-67, IRS-68, IRS-72, IRS-73, IRS-74, IRS-80

User story groups: Access & Delivery, Accessibility, Ingest

2.1.8 Feature: Associated metadata (IRS-135, Critical)

Metadata can be associated with each and every item in the repository.

Is relied upon by: IRS-18, IRS-23, IRS-44, IRS-45, IRS-46, IRS-53, IRS-55, IRS-65, IRS-66, IRS-72, IRS-78, IRS-80, IRS-92, IRS-105, IRS-112, IRS-119

User story groups: Accessibility, Preservation, Sustainability, Access & Delivery, Ingest, Maintenance, Discovery

2.1.9 Feature: Default metadata fields (IRS-136, Critical)

There will be a default set of metadata, some required and some optional, that depositors will be prompted to enter as part of the upload process.

Is relied upon by: IRS-36, IRS-65

User story groups: Branding, Ingest

2.1.10 Feature: Custom metadata (IRS-137, Critical)

Custom metadata fields can be added at the item and/or collection level.

Is relied upon by: IRS-36, IRS-53, IRS-55, IRS-65, IRS-72, IRS-80, IRS-105, IRS-119

User story groups: Sustainability, Branding, Maintenance, Ingest, Discovery

2.1.11 Feature: Batch upload (IRS-138, Critical)

Items can be added to the repository en masse, with associated item-level metadata.

Is relied upon by: IRS-66

User story groups: Ingest

2.1.12 Feature: Collection cross-posting (IRS-144, Critical)

Items within the repository can be assigned to more than one collection, for purposes of browsing and reporting.

Is related to: IRS-126, IRS-158

Is relied upon by: IRS-71

User story groups: Ingest

2.1.13 Feature: Versioning (IRS-146, Critical)

Repository can accept multiple versions of a document, track who made changes, justifications for and dates of new versions, and keep historical versions and have the option to search over and/or display previous versions.

Is related to: IRS-145, IRS-213

Is relied upon by: IRS-37, IRS-62, IRS-73, IRS-74, IRS-88, IRS-117, IRS-120, IRS-125

User story groups: Branding, Preservation, Sustainability, Interoperability, Ingest, Discovery

2.1.14 Feature: Support metadata harvesting (IRS-148, Critical)

The repository should allow metadata from either the whole repository or from collections to be harvested to reuse and indexing in other systems. The metadata should include clean links to the splash pages and content for each item. At present OAI-PMH should probably be supported as the default harvesting mechanism, ResourceSync should also be considered.

Is relied upon by: IRS-44, IRS-82, IRS-91

User story groups: Interoperability, Discovery

2.1.15 Feature: Can associate Creative Commons Licenses (IRS-151, Critical)

Can apply Creative Commons (or comparable license) as it is being uploaded, or after the fact.

Is relied upon by: IRS-38, IRS-76

User story groups: Branding, Ingest

2.1.16 Feature: Batch revision (IRS-152, Critical)

Ability to download metadata for an entire collection, make changes, and re-upload the metadata, thus revising multiple items in a collection simultaneously.

Is relied upon by: IRS-77

User story groups: Ingest

2.1.17 Feature: Collection creation (IRS-156, Critical)

Ability to define and create collections, which are structural groupings of deposited items and perhaps other collections.

Is relied upon by: IRS-27, IRS-35, IRS-40, IRS-102, IRS-106, IRS-107, IRS-119

User story groups: Sustainability, Accessibility, Maintenance, Branding

2.1.18 Feature: Display rights metadata/URI if available (IRS-157, Critical)

There may be a more general "display metadata" feature, but not all metadata will be displayed, and perhaps some customization is available per collection.

Is relied upon by: IRS-18, IRS-38

User story groups: Branding, Access & Delivery

2.1.19 Feature: Item can appear in multiple collections (IRS-158, Critical)

To be worked out, whether there is a 'home' collection with virtual mappings to others, or what exactly is required here.

Is related to: IRS-144

Is relied upon by: IRS-43

User story groups: Branding

2.1.20 Feature: Levels of accessibility (IRS-159, Critical)

Authentication in the system will allow different levels of users. For example some maybe be just registered and so therefore can sign up for things like notifications, but other may be able to create and/or edit collections within their approved space.

Is related to: IRS-133, IRS-184, IRS-214

Is relied upon by: IRS-22, IRS-97, IRS-119

User story groups: Sustainability, Accessibility, Maintenance

2.1.21 Feature: Vendor contract addresses sunseting, data export and interoperability of metadata (IRS-160, Critical)

Maybe this should be three separate features??

Is relied upon by: IRS-28, IRS-121

User story groups: Sustainability, Assessment

2.1.22 Feature: Mechanism for contacting admins (IRS-161, Critical)

Users should easily be able to contact admins to report problems or ask questions, via email or form or messaging system internal to the system.

Is relied upon by: IRS-123

User story groups: Sustainability

2.1.23 Feature: Automatically generated citations (IRS-165, Critical)

The system can take associated metadata and create a citation that will also be included in the metadata.

Is relied upon by: IRS-23

User story groups: Accessibility

2.1.24 Feature: Remote access for users (IRS-168, Critical)

Users can log in remotely.

Is relied upon by: IRS-26

User story groups: Accessibility

2.1.25 Feature: Usage reports and analytics (IRS-170, Critical)

System must provide usage reports at the repository, collection, author, and item levels.

Is relied upon by: IRS-29, IRS-30, IRS-31, IRS-84, IRS-113

User story groups: Assessment, Interoperability, Preservation

2.1.26 Feature: Author updates (IRS-172, Critical)

Authors should receive regular updates on the usage their works are seeing.

Is relied upon by: IRS-30, IRS-31, IRS-57

User story groups: Assessment, Discovery

2.1.27 Feature: Interoperability with discovery systems (IRS-173, Critical)

Repository content can be discovered through external search engines like Google, as well as through in-house discovery systems like Blacklight.

Is related to: IRS-223

Is relied upon by: IRS-44

User story groups: Discovery

2.1.28 Feature: Internal search (IRS-175, Critical)

System must have an internal search engine which allows for searching within the repository as a whole and within a specific collection.

Is relied upon by: IRS-48, IRS-50, IRS-51, IRS-55, IRS-58, IRS-59, IRS-60, IRS-61, IRS-105

User story groups: Maintenance, Discovery

2.1.29 Feature: Faceted search (IRS-176, Critical)

Internal search engine must allow for faceted search, including author names and identifiers.

Is relied upon by: IRS-41, IRS-48, IRS-50, IRS-51, IRS-55, IRS-57, IRS-58, IRS-59, IRS-60, IRS-61, IRS-105

User story groups: Branding, Maintenance, Discovery

2.1.30 Feature: Track revisions (IRS-182, Critical)

When an authorized user makes changes to an item or its metadata, those revisions are tracked and associated with the user.

Is relied upon by: IRS-92

User story groups: Maintenance

2.1.31 Feature: Admin levels (IRS-184, Critical)

Administrators can adjust administration levels of other users.

Is related to: IRS-159

Is relied upon by: IRS-98, IRS-99, IRS-103

User story groups: Maintenance

2.1.32 Feature: Content removal (IRS-185, Critical)

We should be able to remove content from the repository.

Is relied upon by: IRS-100

User story groups: Maintenance

2.1.33 Feature: Ability to include geographic coordinates in metadata (IRS-187, Critical)

In order to support geographic discovery of items there need to be the ability to specify geographic coordinates for points and/or shapes in the metadata for items. The particular coordinate system must either be standardized or specified.

Is relied upon by: IRS-85

User story groups: Interoperability

2.1.34 Feature: Map view of results showing location information for items that include geographic information (IRS-188, Critical)

Need to decide on support for points and/or shapes (see also IRS-187). Assume that items without geographic information would simply not show up.

Is relied upon by: IRS-85

User story groups: Interoperability

2.1.35 Feature: replication of storage with intermediation/gating (IRS-192, Critical)

Feature: replication of storage with intermediation/gating.

Is related to: IRS-199

Is relied upon by: IRS-108, IRS-109

User story groups: Preservation

2.1.36 Feature: Checksums creation/storage for resource and metadata that will be preserved in CULAR (IRS-199, Critical)

Checksums will support a method for smart/automated ingest of IR repository assets and meta-data into CULAR. If they are made immediately after upload, and stored in the IR, checks and reconciliation can be made by CULAR. Appropriate handling of asset can be scripted based on result.

Is related to: IRS-192

Is relied upon by: IRS-108, IRS-109, IRS-111, IRS-117

User story groups: Preservation

2.1.37 Feature: leverage checksums to determine diffs between IR and CULAR (IRS-202, Critical)

Will support: (1) incremental updates (2) detection of issues with assets in IR (corruption).

Is relied upon by: IRS-108, IRS-110

User story groups: Preservation

2.1.38 Feature: Provide download (IRS-203, Critical)

Resources can be downloaded from users by the repository. May involve a variety of formats - local systems will likely not be able to play all of them. Filesize limits may apply for some local systems. Streaming content might present complications with this feature.

Is related to: IRS-211, IRS-217, IRS-219

Is relied upon by: IRS-111, IRS-218

Relies on: IRS-217

User story groups: Ingest, Preservation

2.1.39 Feature: Ability to assign DOIs to supplementary files (IRS-220, Critical)

There should be the ability to create a DOI for a supplementary files. This might either always happen or be on request (create DOI button). Where there is a DOI this must be shown to users of the repository.

Is relied upon by: IRS-3, IRS-68

Relies on: IRS-221

User story groups: Access & Delivery, Ingest

2.1.40 Feature: Ability to adding DOIs to objects (IRS-222, Critical)

There should be the ability to create a DOI for objects in the repository. This might either always happen or be on request (create DOI button). Where there is a DOI this must be shown to users of the repository.

Is relied upon by: IRS-3, IRS-68, IRS-118

Relies on: IRS-221

User story groups: Access & Delivery, Preservation, Ingest

2.1.41 Feature: Interface well with Google indexer (IRS-223, Critical)

What it takes to interface well with Google would need definition.

Is related to: IRS-173

Is relied upon by: IRS-42

User story groups: Branding

2.2 Major priority features

2.2.1 Feature: Readership map (IRS-129, Major)

Feature: Readership map.

Is relied upon by: IRS-193

User story groups: Assessment

2.2.2 Feature: Embargo (IRS-139, Major)

Items can be uploaded such that they will only become publicly available after a certain date (set by the depositor).

Is related to: IRS-215

Is relied upon by: IRS-19, IRS-67, IRS-79, IRS-216

User story groups: Access & Delivery, Ingest

2.2.3 Feature: Embedded streaming media (IRS-141, Major)

Streaming media can be embedded within the repository's item metadata page.

Is related to: IRS-142

Is relied upon by: IRS-69

User story groups: Ingest

2.2.4 Feature: Streaming view of media housed within the repository (IRS-142, Major)

Media housed within the repository can be streamed.

Is related to: IRS-141

Is relied upon by: IRS-69, IRS-82

User story groups: Interoperability, Ingest

2.2.5 Feature: Accepts multimedia (IRS-143, Major)

Multimedia items can be uploaded into the repository.

Is relied upon by: IRS-69, IRS-70, IRS-81

User story groups: Interoperability, Ingest

2.2.6 Feature: Item replacement (IRS-145, Major)

Items within the repository can be replaced by new versions in case of error or update.

Is related to: IRS-146

Is relied upon by: IRS-73

User story groups: Ingest

2.2.7 Feature: Ability to associate supplementary files/objects with a scholarly work (IRS-147, Major)

Either as part of the same object or as related objects it must be possible to associate additional files (datasets, multimedia, etc.) with a scholarly work object. The way to access these additional files must be clear on the splash page for the scholarly work object.

Is related to: IRS-131

Is relied upon by: IRS-24, IRS-68, IRS-81

User story groups: Interoperability, Accessibility, Ingest

2.2.8 Feature: Incorporates author identifiers (IRS-153, Major)

Repository can accept author identifiers (e.g. ORCID) as item-level metadata.

Is relied upon by: IRS-41, IRS-49, IRS-50, IRS-57, IRS-78

User story groups: Branding, Ingest, Discovery

2.2.9 Feature: Collections can have customized look and feel (IRS-154, Major)

Collections can be customized for branding, descriptive text, collection-level metadata, and item sorting.

Is relied upon by: IRS-27, IRS-33, IRS-35, IRS-40, IRS-107

User story groups: Branding, Accessibility, Maintenance

2.2.10 Feature: Notifications (IRS-163, Major)

User-requested notifications of new content for a given topic, department, author, or the repository as a whole; updates to specific items or topics; or new versions of a given item.

Is relied upon by: IRS-15, IRS-16, IRS-20, IRS-31, IRS-47, IRS-61, IRS-89

User story groups: Interoperability, Access & Delivery, Assessment, Discovery

2.2.11 Feature: Author works homepage (IRS-164, Major)

A single page where all of an author's works can be listed, whether they're in the repository or not. Possibly redundant with VIVO.

Is relied upon by: IRS-21, IRS-49, IRS-57

User story groups: Accessibility, Discovery

2.2.12 Feature: Accepts multiple file types as primary file (IRS-166, Major)

System can accept multiple file types as the primary file, perhaps even being completely format agnostic in this manner.

Is relied upon by: IRS-24, IRS-75, IRS-86

User story groups: Interoperability, Accessibility, Ingest

2.2.13 Feature: Mobile ready UI (IRS-167, Major)

User interface is designed for use on mobile devices.

Is relied upon by: IRS-25

User story groups: Accessibility

2.2.14 Feature: Interoperability with external analytics and altmetric systems (IRS-171, Major)

System must be able to work with external systems to provide useful analytics and altmetrics, or be able to provide the same internally.

Is related to: IRS-113

Is relied upon by: IRS-29, IRS-30

User story groups: Assessment

2.2.15 Feature: Ability to add cover pages to PDFs (IRS-174, Major)

Users who go directly to a PDF in the repository – without passing through a metadata page – still see information on a cover page about the location of the item in the repository and other metadata. Will have to decide when the cover page is added (added dynamically, cached derivative), what portions of the repository this applies to and how that is controlled (perhaps flag by collection), and how to handle cases where there are problems with a particular PDF.

Is relied upon by: IRS-45

User story groups: Discovery

2.2.16 Feature: Browse by author (IRS-177, Major)

Users should be able to browse the repository by author name.

Is relied upon by: IRS-49, IRS-52

User story groups: Discovery

2.2.17 Feature: Browse by subject (IRS-178, Major)

Users should be able to browse the collection by subject.

Is relied upon by: IRS-52, IRS-58, IRS-59, IRS-60

User story groups: Discovery

2.2.18 Feature: Link to external system in lieu of providing direct download (IRS-181, Major)

The repository should be able to provide a link to an item in a trusted external system in lieu of the item being directly downloadable from the repository. This substitution should be seamless and intuitive to the user.

Is relied upon by: IRS-56

User story groups: Discovery

2.2.19 Feature: Accepts large files (IRS-183, Major)

The system should be able to handle files larger than 1GB, allowing them to be uploaded and downloaded smoothly.

Is relied upon by: IRS-94
User story groups: Maintenance

2.2.20 Feature: Flexible collection infrastructure (IRS-186, Major)

Collections can be moved between parent structures after creation.
Is relied upon by: IRS-106
User story groups: Maintenance

2.2.21 Feature: Special class of logins called asset managers, which are authorized for enhanced functions of management (IRS-205, Major)

This class should be able to derive administrative reporting of large classes of assets. This class may affect assets deposited by others, possibly including the reorganization, addition deletion or re-description of assets.
Is related to: IRS-201
Is relied upon by: IRS-113
User story groups: Preservation

2.2.22 Feature: CULAR development to identify a wider range of filetypes (IRS-207, Major)

Feature: CULAR development to identify a wider range of filetypes.
Is relied upon by: IRS-115
User story groups: Preservation

2.2.23 Feature: Provide file integrity verification (IRS-211, Major)

Ideally, checksum would be available for comparison to a displayed value to assure downloaded file is identical to stored copy.
Is related to: IRS-203
Is relied upon by: IRS-111
User story groups: Preservation

2.3 Low priority features

2.3.1 Feature: Support persistent URIs for direct access to datastreams to allow reuse and embedding (IRS-149, Low)

In order to be able to readily re-use content from the repository without having to separately crawl/harvest it, there should be direct and persistent URIs for access to content. For example, this would allow an image in the repository to be included in a libguide or in an exhibition webpage.

Is related to: IRS-127, IRS-213

Is relied upon by: IRS-82

User story groups: Interoperability

2.3.2 Feature: Authentication for users beyond Cornell (IRS-150, Low)

Builds on IRS-133 (auth) to cover the need for restricted access to users and or groups of users that are not part of Cornell. FIXME - will need to refine specification to be clear about how such users will be identified, how groups might be implemented, and how such data will be maintained.

Is relied upon by: IRS-83, IRS-89

User story groups: Interoperability

2.3.3 Feature: Ability to limit access to current version only (IRS-155, Low)

Required when older versions should not be publicly accessible. Will need to decide policies about when and by whom access might be limited in this way (IRS-213).

Is related to: IRS-213

Is relied upon by: IRS-37

Relies on: IRS-146

User story groups: Branding

2.3.4 Feature: Disposition scheduling (IRS-162, Low)

I see this as the opposite of an embargo in a way - rather a time frame after which an item no longer needs to be stored (or made accessible). This might include true disposition, or it could be movement to an archived location??

Is relied upon by: IRS-124

User story groups: Sustainability

2.3.5 Feature: Interoperability with faculty tracking systems (IRS-169, Low)

Repository should be able to both harvest from and export to faculty tracking systems such as Symplectic Elements, Activity Insight, and VIVO.

Is relied upon by: IRS-28

User story groups: Assessment

2.3.6 Feature: Relationships between items (IRS-179, Low)

Items in the repository can be explicitly related to each other. (External relationships are covered by IRS-130.).

Is related to: IRS-130, IRS-180

Is relied upon by: IRS-54

User story groups: Discovery

2.3.7 Feature: See also for similar items (IRS-180, Low)

Based on the item a user is looking at, the repository suggests other similar items.

Is related to: IRS-179

Is relied upon by: IRS-54, IRS-87

User story groups: Interoperability, Discovery

2.3.8 Feature: Explicit relationships between different items in the repository (IRS-189, Low)

Metadata includes explicit, semantic relationships between items in the repository. Might be as simple as `related_to` or `similar_to`, but could also be more specific such as `replaces`, `update_of`, etc.

Is relied upon by: IRS-87, IRS-88

User story groups: Interoperability

2.3.9 Feature: Associate release schedule/calendar with item (IRS-190, Low)

Ability to associate a release schedule/calendar with an item for past and planned releases. Will need facilities to edit this schedule, tie particular versions to it, probably also generate notifications from it. Will need to be able to display this on the web and also to download in a suitable form/forms for input into common calendar applications.

Is relied upon by: IRS-90

User story groups: Interoperability

2.3.10 Feature: Inclusion of or ability to integrate with calendar system (IRS-208, Low)

The system either includes an internal calendar system, or can integrate with an external one, allowing for the announcement of scheduled releases.

Is relied upon by: IRS-14, IRS-101

User story groups: Access & Delivery, Maintenance

2.3.11 Feature: Different file types can be displayed differently within the repository (IRS-209, Low)

Depending on primary file type, the display may automatically differ.

Is relied upon by: IRS-75

User story groups: Ingest

2.3.12 Feature: Integrate with preservation repository to ensure preservation of metadata and content (IRS-224, Low)

There should be integration with a preservation repository (likely CULAR) such that either all or selected content (perhaps by collection) in the IR is preserved. New content must be added/synchronized to the preservation system within a defined timescale, and there should be a check to ensure consistency over time.

Is relied upon by: IRS-116

User story groups: Preservation

3 Policies grouped by priority

3.1 Critical priority policies

3.1.1 Policy: Dedicated tech support (IRS-196, Critical)

Tech support for repository managers will be provided for, with responses coming quickly and resolution independent of sprint schedules whenever possible.

Is relied upon by: IRS-93

User story groups: Maintenance

3.1.2 Policy: There are policies that govern when a preservation copy is accessed, and by whom (IRS-200, Critical)

Policy: There are policies that govern when a preservation copy is accessed, and by whom.

Is relied upon by: IRS-108

User story groups: Preservation

3.1.3 Policy: minimum required metadata for every asset (IRS-204, Critical)

We almost certainly want to REQUIRE a set of elements at minimum that will describe uploaded assets. Some of this can be automated - snarfed at upload (depositor ID, date/time uploaded, for instance). Other elements are necessary, but will require user input: author, title, etc. The upload interface should enforce required elements.

Is relied upon by: IRS-112

User story groups: Preservation

3.1.4 Policy: Explicit sponsorship of preservation repository (IRS-206, Critical)

Includes explicit institutional expression of appropriate dedication of development resources to CULAR (commitment of \$\$ and FTE), and sustainable business plan for CULAR or other suitable replacement strategy.

Is relied upon by: IRS-114

User story groups: Preservation

3.1.5 Policy: Decide if content has a default rights statement assigned to it (IRS-212, Critical)

Will all content fall under CC-0? Will users be able to assign any license they want to it? Will users be able to not make a right statement at all? Are there any rights statements the IR should not be offering?

Is relied upon by: IRS-38, IRS-39

User story groups: Branding

3.1.6 Policy: Decide and articulate versioning practices (IRS-213, Critical)

IR should have clearly articulated policy on versioning - when and where and by whom it can be applied (eg. currently eCommons applies versioning for only items typed as datasets), and if there are ever exceptions to the stated policy.

Is related to: IRS-127, IRS-146, IRS-149, IRS-155

Is relied upon by: IRS-15, IRS-37, IRS-62, IRS-74, IRS-89, IRS-92, IRS-117, IRS-125

User story groups: Branding, Preservation, Sustainability, Access & Delivery, Interoperability, Ingest, Maintenance, Discovery

3.1.7 Policy: Determine policies for DOI creation (IRS-221, Critical)

Determine policies for DOI creation for objects and supplementary files. These could be created on-demand or for all items, Datasets should have DataCite DOIs (which we can create via the EZID service), need to be decided on appropriate registration agency for articles and other material. Need to determine particular metadata requirements and mapping to support the DOI registrations. Need to decide on the policy for handling DOIs when items are updated or deleted.

Is relied upon by: IRS-3, IRS-68, IRS-118

User story groups: Access & Delivery, Preservation, Ingest

3.2 Major priority policies

3.2.1 Policy: User-sponsored collections (IRS-198, Major)

Users, especially faculty, must have a means to suggest the creation of a series in order to assist their research or instruction.

Is relied upon by: IRS-102

User story groups: Maintenance

3.2.2 Policy: definition of who appropriately fills various decision making roles (IRS-201, Major)

Policy: definition of who appropriately fills various decision making roles.

Is related to: IRS-205

Is relied upon by: IRS-109, IRS-110, IRS-113

User story groups: Preservation

3.2.3 Policy: Decide policies related to embargos (IRS-215, Major)

Decide polices related to embargo, including allowable duration, when they can be applied, who can apply them (can users set at point of upload, or are they administratively applied only?), on what content can they be applied (eg. dissertations only? datasets?).

Is related to: IRS-139

Is relied upon by: IRS-19, IRS-67, IRS-79

User story groups: Access & Delivery, Ingest

3.2.4 Policy: Decide policies related to downloads (IRS-217, Major)

Decide policies related to downloads, eg. can users set a requirement for notification or authorization? This will have long term management implications.

Is related to: IRS-203, IRS-219

Is relied upon by: IRS-218

User story groups: Ingest

3.2.5 Policy: Decide polices related to records management (IRS-219, Major)

Decide policies related to records management, eg. will the IR ever de-accession content? If a cost model is implemented, will fees be related to how long content is maintained in the repository?

Is related to: IRS-203, IRS-217

Is relied upon by: IRS-31, IRS-218

User story groups: Assessment, Ingest

3.3 Low priority policies

3.3.1 Policy: Include advisors as searchable metadata for ETDs (IRS-195, Low)

Include thesis and dissertation advisors as searchable metadata for all ETDs in the repository.

Is relied upon by: IRS-55

User story groups: Discovery

3.3.2 Policy: Administrators can access and make changes to user accounts (IRS-197, Low)

Administrators can access and make changes to user accounts, including aspects such as passwords and even the existence of said account.

Is relied upon by: IRS-32, IRS-96, IRS-99, IRS-104

User story groups: Assessment, Maintenance

3.3.3 Policy: Decide policy regarding granularity of access control (IRS-214, Low)

Decide on granularity of access control, eg. "account holders", CU affiliates, subgroups within CU, particular individuals??? Has implications for long-term management.

Is related to: IRS-159

Is relied upon by: IRS-22

User story groups: Accessibility

4 User stories

4.1 Access & Delivery

4.1.1 User story: As a faculty member, I want to access a collection within the repository in order to obtain research materials. (IRS-1, Access & Delivery, Critical)

Relies on: IRS-126

4.1.2 User story: As a faculty member, I want to direct students to an item within the repository in order to facilitate my teaching (i.e. desires ability to link to content). (IRS-2, Access & Delivery, Critical)

Relies on: IRS-127

4.1.3 User story: We image that the publication is on an external site (such as a journal website) with a URI or DOI. The repository should be able to present to the user a link to the publication. The idea of receiving attribution is that the dataset is linked and citable. Our current belief is that the best way (often required by public policy) to achieve this is through DataCite DOIs. (IRS-3, Access & Delivery, Critical)

Is related to: IRS-63, IRS-68

Relies on: IRS-130, IRS-131, IRS-132, IRS-133, IRS-220, IRS-221, IRS-222

4.1.4 User story: As a DB/IR administrator, I want to manage report/dataset name changes so patrons are able to find historic reports that have a different name from current report. (IRS-17, Access & Delivery, Critical)

Relies on: IRS-130

4.1.5 User story: As a patron or administrator, I want to select/deselect reports/datasets to be emailed, possibly many at one time, when new versions are available. (IRS-15, Access & Delivery, Major)

Is related to: IRS-117

Relies on: IRS-163, IRS-213

4.1.6 User story: As a DB/IR administrator, I want to mark report/dataset not to be emailed/viewable due to error being discovered. (IRS-16, Access & Delivery, Major)

Relies on: IRS-163

4.1.7 User story: As a library staff member, I want to apply or remove an access embargo to an item, because an item author has asked them to do this. (IRS-19, Access & Delivery, Major)

Is related to: IRS-67, IRS-216

Relies on: IRS-133, IRS-134, IRS-139, IRS-215

4.1.8 User story: As a researcher, I want to stay up to date on research related to a given topic at Cornell, including those in other departments/schools, so my own research remains relevant and innovative. That might include getting notified by email when new materials related to my interests are deposited in one or more repositories. (IRS-20, Access & Delivery, Major)

Relies on: IRS-133, IRS-163

4.1.9 User story: As a patron, I want to know which reports/datasets are coming out when (date and time) in order to access latest report/dataset. (IRS-14, Access & Delivery, Low)

Relies on: IRS-208

4.1.10 User story: A Cornell faculty member/researcher wants to see clearly what reuse rights they have to files discovered in the repository, so that they know how they can reuse them. (IRS-18, Access & Delivery, Low)

Is related to: IRS-38

Relies on: IRS-135, IRS-157

4.2 Accessibility

4.2.1 User story: As a Cornell faculty member I want to upload data and provide a cut and paste formatted citation for people who use it so that I receive proper attribution for my work. (IRS-23, Accessibility, Critical)

Relies on: IRS-131, IRS-132, IRS-133, IRS-135, IRS-165

4.2.2 User story: A Cornell faculty member/researcher wants to login remotely to the repository using Shibboleth, to get remote access to Cornell campus-only content. (IRS-26, Accessibility, Critical)

Relies on: IRS-133, IRS-168

4.2.3 User story: As a faculty member, I want to easily collect my publications – both those within the repository and without – into a single online access point, in order to raise the profile of my work. (IRS-21, Accessibility, Major)

Relies on: IRS-127, IRS-133, IRS-164

4.2.4 User story: As a patron/administrator, I want to view/upload content in multiple formats (e.g. .pdf, .txt, .xls, .zip), including old formats such as Lotus Works. (IRS-24, Accessibility, Major)

Relies on: IRS-132, IRS-134, IRS-147, IRS-166

4.2.5 User story: A Cornell faculty member/researcher wants to search the repository and browse through its contents on their phone, to check things on the go. (IRS-25, Accessibility, Major)

Relies on: IRS-167

4.2.6 User story: A Cornell faculty member/researcher wants to have some control over how items within their collection sort in collection contents lists, because they are very particular about how their work is presented. (IRS-27, Accessibility, Major)

Relies on: IRS-126, IRS-133, IRS-154, IRS-156

4.2.7 User story: As a cross-departmental project team member, I/we need a better place to collect and share project materials, with a range of organization/tagging and access options, including private (internal group use only), University and public. These materials are widely heterogeneous, ranging from raw data to specialized outputs like maps and other data visualizations. (IRS-22, Accessibility, Low)

Relies on: IRS-132, IRS-133, IRS-159, IRS-214

4.3 Assessment

4.3.1 User story: As a library staff member, I want to access useful and comprehensive usage statistics and analytics, including altmetrics, at the repository, collection, author, and item level, in order to assess the results of this service. (IRS-29, Assessment, Major)

Relies on: IRS-133, IRS-170, IRS-171

4.3.2 User story: As an administrator I want comprehensive tracking statistics that can be presented to faculty in a digestible way to increase buy-in for contributing their work. (IRS-30, Assessment, Major)

Is related to: IRS-31

Relies on: IRS-133, IRS-170, IRS-171, IRS-172

4.3.3 User story: As a Cornell faculty member I would like to be notified if someone downloads any of my items or files so I can follow usage and see what others are most interested in reading. (IRS-31, Assessment, Major)

Is related to: IRS-30, IRS-218

Relies on: IRS-133, IRS-163, IRS-170, IRS-172, IRS-219

4.3.4 User story: As an administrator, I would like use of items within the repository to display on a dynamic, embeddable map so that I can showcase our scholarship's global reach. (IRS-193, Assessment, Major)

Relies on: IRS-129

4.3.5 User story: As an administrator, I want to be able to use systems such as Symplectic Elements and Activity Insight to properly track faculty scholarly output in the repositories, in order to facilitate personnel decisions. (IRS-28, Assessment, Low)

Relies on: IRS-133, IRS-160, IRS-169

4.3.6 User story: As a DB/IR administrator, I want to see list of subscribers for specified report in order research missing report complaints. (IRS-32, Assessment, Low)

Relies on: IRS-197

4.4 Branding

4.4.1 User story: As a faculty member, I want to upload my scholarly work to the repository in order to have a persistent URL that can be used for my personal web page and CV. (IRS-34, Branding, Critical)

Relies on: IRS-127, IRS-132, IRS-133

4.4.2 User story: As a Cornell faculty member I want to upload a data file and put a CC-By (or CC0) license on it so that my licensing desires are clearly stated. (IRS-38, Branding, Critical)

Is related to: IRS-18

Relies on: IRS-131, IRS-132, IRS-133, IRS-151, IRS-157, IRS-212

4.4.3 User story: A Cornell faculty member/researcher wants to see items they have deposited in the repository appear high up in Google search results, because that's their ticket to stardom. (IRS-42, Branding, Critical)

Relies on: IRS-223

4.4.4 User story: A repository support team member wants to alias (or map) an item from one collection to another (so the item will appear to belong to both collections), because the collection owner has asked them to. (IRS-43, Branding, Critical)

Relies on: IRS-133, IRS-158

4.4.5 User story: As an administrator, I want to disseminate the aforementioned works in a digital space that is strongly branded, in order to make sure my school is credited for the work. (IRS-33, Branding, Major)

Relies on: IRS-133, IRS-154

4.4.6 User story: As a library staff member, I want to create collections which highlight rare, archival, or endangered material, in order to preserve and provide access to this material. (IRS-35, Branding, Major)

Relies on: IRS-133, IRS-154, IRS-156

4.4.7 User story: As a librarian / member of the library staff I want to be able to tell the researchers I'm helping with DMPs that Cornell has a repository system they can use for archiving and sharing results of their research so they can easily meet the needs of funder DMP requirements. (IRS-39, Branding, Major)

Relies on: IRS-131, IRS-212

4.4.8 User story: A Cornell faculty member/researcher wants to create a collection for their documents, or their organization's documents, and apply some distinctive branding to that collection, to promote their work, or that of their organization. (IRS-40, Branding, Major)

Relies on: IRS-126, IRS-133, IRS-154, IRS-156

4.4.9 User story: A Cornell faculty member/researcher wants to easily find all the items in the repository that she has authored, by searching on her name (author name authority and/or identification issue), because she keeps her publications in the repository up-to-date and points people to the repository. (IRS-41, Branding, Major)

Relies on: IRS-153, IRS-176

4.4.10 User story: As an Extension Administrator or Staff Content Manager, I want customizable metadata templates to meet the needs of specific user groups (collections or communities). (IRS-36, Branding, Low)

Relies on: IRS-136, IRS-137

4.4.11 User story: As a faculty member/Extension Educator/Extension Associate, I want to maintain versioning of Extension brochures, FAQs, etc., so only the most current are used/adapted by other CCE Educators in their work. (IRS-37, Branding, Low)

Relies on: IRS-133, IRS-146, IRS-155, IRS-213

4.5 Discovery

4.5.1 User story: As a researcher, I want to discover items in the repository through the library's discovery system and Google, in order to facilitate my easy use of the content. (IRS-44, Discovery, Critical)

Relies on: IRS-135, IRS-148, IRS-173

4.5.2 User story: As a researcher, I want to contact the author of a work that interests me, in order to learn more about their research. (IRS-46, Discovery, Critical)

Relies on: IRS-130, IRS-135

4.5.3 User story: As a researcher, I want to search within a repository or collection in an effective manner, including searching within subsets of a given collection, in order to facilitate my use of the collection. (IRS-48, Discovery, Critical)

Relies on: IRS-175, IRS-176

4.5.4 User story: As a patron, I want to search for report/dataset with keywords or a partial or complete title to locate needed report/dataset. (IRS-51, Discovery, Critical)

Relies on: IRS-175, IRS-176

4.5.5 User story: As a DB/IR administrator, I want to manage subject classifications for ease of patron browsing and searching. (IRS-53, Discovery, Critical)

Relies on: IRS-133, IRS-135, IRS-137

4.5.6 User story: As a patron, I want to view multiple versions of a report/dataset to get both timely and historical information. (IRS-62, Discovery, Critical)

Is related to: IRS-117

Relies on: IRS-146, IRS-213

4.5.7 User story: As a researcher, I want to see descriptive metadata for the item whether I come to the item through the repository or directly to the PDF, in order to correctly identify the source of the content. (IRS-45, Discovery, Major)

Relies on: IRS-135, IRS-174

4.5.8 User story: As a researcher, I want to receive updates when new works are published in a given collection or by a given author, in order to discover more of their work. (IRS-47, Discovery, Major)

Relies on: IRS-133, IRS-163

4.5.9 User story: As an academic researcher, I want to find the works of a particular author in one easily sortable spot so I can see the evolution of their scholarship over time. (IRS-49, Discovery, Major)

Relies on: IRS-153, IRS-164, IRS-177

4.5.10 User story: As an academic researcher, I'm interested in finding the thesis paper of an influential judge or legal thinker to gain insight into how their initial scholarship got started. (IRS-50, Discovery, Major)

Relies on: IRS-153, IRS-175, IRS-176

4.5.11 User story: As a patron, I want to browse content by author or subject area to locate needed resources. (IRS-52, Discovery, Major)

Relies on: IRS-177, IRS-178

4.5.12 User story: As a library staff member, I want to make digital items held in trusted external system searchable within our system, in order to provide seamless access to disparate collections. (IRS-56, Discovery, Major)

Is related to: IRS-57

Relies on: IRS-133, IRS-181

4.5.13 User story: As a researcher/faculty member, I want information that will help me identify other faculty I might partner/collaborate with. (IRS-57, Discovery, Major)

Is related to: IRS-56

Relies on: IRS-153, IRS-164, IRS-172, IRS-176

4.5.14 User story: As an external user, I want a way to easily find and access research and educational materials from Cornell faculty related [to a particular topic, such as climate change] which I can use to develop stronger research/evidence based programming, grant proposals, community policy, or business practices. (IRS-58, Discovery, Major)

Is related to: IRS-59, IRS-60

Relies on: IRS-175, IRS-176, IRS-178

4.5.15 User story: As a potential student, I want to learn who at Cornell (on and off campus), has or is engaged in research related to [a particular topic, such as climate change], so I can decide if I would like to pursue studies/research at Cornell. (IRS-59, Discovery, Major)

Is related to: IRS-58, IRS-60

Relies on: IRS-175, IRS-176, IRS-178

4.5.16 User story: As a potential or current student, I want to learn who at Cornell, has or is engaged in research related to [a particular topic, such as climate change], so I can find an appropriate advisor, choose which courses to enroll in, and identify work/internship opportunities. (IRS-60, Discovery, Major)

Is related to: IRS-58, IRS-59

Relies on: IRS-175, IRS-176, IRS-178

4.5.17 User story: As a teaching faculty member, I want to identify timely and relevant research suitable for use in my curriculum, and be notified of new research/content. (IRS-61, Discovery, Major)

Relies on: IRS-163, IRS-175, IRS-176

4.5.18 User story: As a DB/IR administrator, I want to manage customizable relationship groups in support of patron see also option. (IRS-54, Discovery, Low)

Relies on: IRS-133, IRS-179, IRS-180

4.5.19 User story: A Cornell faculty member/researcher wants to search for the dissertations in the repository for which they have been a thesis committee member, to quickly find work by a former student. (IRS-55, Discovery, Low)

Relies on: IRS-135, IRS-137, IRS-175, IRS-176, IRS-195

4.6 Ingest

4.6.1 User story: As a faculty member, I want to upload my scholarly work to the repository in order to reach a non-academic audience, expand my influence within my academic community, and use it for teaching. (IRS-63, Ingest, Critical)

Is related to: IRS-3

Relies on: IRS-132, IRS-133

4.6.2 User story: As a library staff member, I want to upload material to the repository on the authors behalf, in order to fulfill a service obligation. (IRS-64, Ingest, Critical)

Relies on: IRS-133, IRS-134

4.6.3 User story: As a library staff member, I want to create metadata for items within the repository that includes document title, description, author, document type, status, file locations, subscribable flag, subject area, release frequency, and keywords for searching. (IRS-65, Ingest, Critical)

Relies on: IRS-133, IRS-135, IRS-136, IRS-137

4.6.4 User story: As a library staff member, I want to upload large batches of items simultaneously, including descriptive metadata, in order to offer service to authors efficiently. (IRS-66, Ingest, Critical)

Relies on: IRS-133, IRS-134, IRS-135, IRS-138

4.6.5 User story: As a librarian / member of the library staff I want to be able to assign an item to more than one collection. (IRS-71, Ingest, Critical)

Relies on: IRS-133, IRS-144

4.6.6 User story: As a librarian / member of the library staff I want to be able to add custom metadata fields for deposits I make on behalf of researchers to allow for better search capabilities. (IRS-72, Ingest, Critical)

Is related to: IRS-80

Relies on: IRS-133, IRS-134, IRS-135, IRS-137

4.6.7 User story: As a DB/IR administrator, I want to upload new version of report/dataset while retaining previous versions for patron use. (IRS-74, Ingest, Critical)

Is related to: IRS-117

Relies on: IRS-133, IRS-134, IRS-146, IRS-213

4.6.8 User story: An the repository support team member wants to export a set of records and associated files, manipulate this data set, and reload into the system, because they are aware of a uniform error in a collection. (IRS-77, Ingest, Critical)

Relies on: IRS-133, IRS-152

4.6.9 User story: As a library staff member I want customizable metadata fields so each project is described in the most accurate way possible. (IRS-80, Ingest, Critical)

Is related to: IRS-72

Relies on: IRS-133, IRS-134, IRS-135, IRS-137

4.6.10 User story: As a library staff member, I want to upload an item to the repository that will only become visible after a specific embargo period has expired, in order to comply with author or publisher requirements. (IRS-67, Ingest, Major)

Is related to: IRS-19, IRS-216

Relies on: IRS-132, IRS-133, IRS-134, IRS-139, IRS-215

4.6.11 User story: As a library staff member, I want to include supplementary files such as datasets, slideshows, etc. with DOIs for each, as needed when uploading a given work, in order to provide a robust image of the work in question. (IRS-68, Ingest, Major)

Is related to: IRS-3

Relies on: IRS-133, IRS-134, IRS-147, IRS-220, IRS-221, IRS-222

4.6.12 User story: As a library staff member, I want to deliver streaming media from within the repository, in order to deliver such content in the manner expected and ensure continued access to said content. (IRS-69, Ingest, Major)

Relies on: IRS-133, IRS-141, IRS-142, IRS-143

4.6.13 User story: As an administrator I want a platform that can support a variety of media file and text-based formats to showcase and preserve the intellectual output of the school in a more comprehensive way. (IRS-70, Ingest, Major)

Relies on: IRS-143

4.6.14 User story: As a DB/IR administrator, I want to upload revised report/dataset due to error in report/document. (IRS-73, Ingest, Major)

Relies on: IRS-133, IRS-134, IRS-145, IRS-146

4.6.15 User story: As a Cornell faculty member I would like to associate a researcherID or ORCID with a submission so there is no ambiguity between my work and someone else with the same name. (IRS-78, Ingest, Major)

Relies on: IRS-132, IRS-133, IRS-135, IRS-153

4.6.16 User story: As a student I want to upload to the repository the data that is associated with my embargoed dissertation to meet requirements of a DMP I submitted with my NSF DDIG. (IRS-79, Ingest, Major)

Is related to: IRS-216

Relies on: IRS-131, IRS-132, IRS-133, IRS-139, IRS-215

4.6.17 User story: As a faculty member or student, I want to set my own embargo during the submission process. (IRS-216, Ingest, Major)

Is related to: IRS-19, IRS-67, IRS-79

Relies on: IRS-132, IRS-133, IRS-139

4.6.18 User story: As a patron, I want the option to authorize and also be notified when someone wants to and then downloads my content. (IRS-218, Ingest, Major)

Is related to: IRS-31

Relies on: IRS-203, IRS-217, IRS-219

4.6.19 User story: As a DB/IR administrator, I want the system to recognize/categorize document type (e.g. historical report still published, expired historical report, single topic dataset, broad topic dataset, report with subtopic, computer file) so that report/dataset is processed and displayed properly. (IRS-75, Ingest, Low)

Relies on: IRS-166, IRS-209

4.6.20 User story: A Cornell faculty member/researcher wants to easily assign a CC license to the files they are depositing, so that users know how the materials can be used. (IRS-76, Ingest, Low)

Relies on: IRS-132, IRS-133, IRS-151

4.7 Interoperability

4.7.1 User story: As an Extension Administrator or Staff Content Manager, I want ability to get periodic IR reminders, including when something needs attention (including next ingestion/approval steps), or something that might need to move from a current knowledge collection to Historical. (IRS-84, Interoperability, Critical)

Is related to: IRS-90

Relies on: IRS-170

4.7.2 User story: As a researcher, I want to promote/share my work through interactive maps, displaying the range and extent of my work graphically. (IRS-85, Interoperability, Critical)

Relies on: IRS-187, IRS-188

4.7.3 User story: The operator of library discovery and access services at University YYY wants to harvest useful metadata from the repository via OAI, and continue to do so incrementally, because they have been asked to make Cornell publications discoverable in their repository. (IRS-91, Interoperability, Critical)

Relies on: IRS-148

4.7.4 User story: As a faculty member, I want to associate files – datasets, images, video – with my scholarly works such that someone accessing the latter also receives access to the former, in order to deliver the fullest picture of my research. (IRS-81, Interoperability, Major)

Relies on: IRS-131, IRS-143, IRS-147

4.7.5 User story: As an Extension Educator/Associate, I want a place to store a variety of documents, presentations and data sets I've created, that doesn't require an extra step in making available on my own County/Region/Project site (i.e. a list or directory of materials there is automatically updated when placed in a central archive/repository). (IRS-86, Interoperability, Major)

Relies on: IRS-131, IRS-132, IRS-166

4.7.6 User story: As a library staff member, I want to use content and metadata from the repository in other systems and/or web pages easily, in order to deliver such content in the manner best fit to the audience or occasion. (IRS-82, Interoperability, Low)

Relies on: IRS-127, IRS-142, IRS-148, IRS-149

4.7.7 User story: As an Organization/Extension Administrator, we need to make resources (FIXME - type?) that were developed for specific projects and geographic areas available to other faculty and educators across NYS. Assume here that the key is restricted access to additional users, rather than simply open access which would avoid the need for auth. Otherwise this task relies just on basic ingest and dissemination features. (IRS-83, Interoperability, Low)

Relies on: IRS-133, IRS-150

4.7.8 User story: As a patron, I want to know other reports/datasets that are related (e.g. see also) to report/dataset being viewed for the purpose finding other related information. (IRS-87, Interoperability, Low)

Relies on: IRS-180, IRS-189

4.7.9 User story: As a patron, I want to know previous name(s) and publication date range (first version-last version) of reports/datasets in order to know what historical versions are available and how current more recent version is. (IRS-88, Interoperability, Low)

Relies on: IRS-146, IRS-189

4.7.10 User story: As a patron, I want to create a personal account to request email notification when new version of report/dataset is available. (IRS-89, Interoperability, Low)

Relies on: IRS-133, IRS-150, IRS-163, IRS-213

4.7.11 User story: As a patron, I want to download report/dataset release calendar to load into my own calendar. (IRS-90, Interoperability, Low)

Is related to: IRS-84

Relies on: IRS-190

4.8 Maintenance

4.8.1 User story: As a library staff member, I want to quickly correct errors in uploaded metadata, and even uploaded documents, while leaving a record of my revisions (and possibly the reasons behind them), in order to present correct versions of content and to locate points of error. (IRS-92, Maintenance, Critical)

Is related to: IRS-117

Relies on: IRS-133, IRS-135, IRS-182, IRS-213

4.8.2 User story: As a library staff member, I want to receive a quick response and a reasonable resolution to tech support issues, so that service can proceed with minimal interruption. (IRS-93, Maintenance, Critical)

Relies on: IRS-196

4.8.3 User story: As a DB/IR administrator, I want to login to personal account with access to authorized functions. (IRS-95, Maintenance, Critical)

Relies on: IRS-133

4.8.4 User story: As a DB/IR administrator, I want to set up or delete accounts for other administrators with various levels of permission (e.g. full administrator, editor). (IRS-97, Maintenance, Critical)

Is related to: IRS-98, IRS-99, IRS-103

Relies on: IRS-133, IRS-159

4.8.5 User story: As a DB/IR administrator, I want to see a list of all administrators for ease of administrating accounts. (IRS-98, Maintenance, Critical)

Is related to: IRS-97, IRS-99, IRS-103

Relies on: IRS-133, IRS-184

4.8.6 User story: As a DB/IR administrator, I want to un-publish a report/dataset if requested to do so by USDA agency. (IRS-100, Maintenance, Critical)

Relies on: IRS-133, IRS-185

4.8.7 User story: As a DB/IR administrator, I want to search for administrator accounts using full/partial email or name. (IRS-103, Maintenance, Critical)

Is related to: IRS-97, IRS-98

Relies on: IRS-133, IRS-184

4.8.8 User story: As a library staff member, I want to create custom metadata fields for certain collections, and allow searching of those fields, in order to best reflect and deliver diverse content. (IRS-105, Maintenance, Critical)

Relies on: IRS-133, IRS-135, IRS-137, IRS-175, IRS-176

4.8.9 User story: As a Cornell faculty member I want to share on the repository files that are larger than 1GB in a way that still allows users to download them if they want to use them because thats what I work in and I need to share to meet funder requirements. (IRS-94, Maintenance, Major)

Relies on: IRS-132, IRS-133, IRS-183

4.8.10 User story: As a faculty member, I want to recommend a digital collection be built in the repository in order to assist in my research. (IRS-102, Maintenance, Major)

Relies on: IRS-126, IRS-156, IRS-198

4.8.11 User story: A repository support team member wants to move a collection (move a node to a new parent within tree structure), because the collection owner has asked them to. (IRS-106, Maintenance, Major)

Relies on: IRS-126, IRS-133, IRS-156, IRS-186

4.8.12 User story: A repository support team member wants to rename a collection (a node in tree structure), because the collection owner has asked them to. (IRS-107, Maintenance, Major)

Relies on: IRS-126, IRS-133, IRS-154, IRS-156

4.8.13 User story: As a DB/IR administrator, I want a personal account with the ability to change passwords to make them more secure or to retrieve forgotten ones. (IRS-96, Maintenance, Low)

Relies on: IRS-133, IRS-197

4.8.14 User story: As a DB/IR administrator, I want robust searching and tracking features for existing and newly created patron accounts. (IRS-99, Maintenance, Low)

Is related to: IRS-97, IRS-98

Relies on: IRS-133, IRS-184, IRS-197

4.8.15 User story: As a DB/IR administrator, I want to add future release dates of reports/datasets to calendar for patron FYI. (IRS-101, Maintenance, Low)

Relies on: IRS-208

4.8.16 User story: As a DB/IR administrator, I want to administrate patron accounts for purpose of closing accounts, viewing subscriptions, changing subscriptions, re-setting passwords, changing email address, etc. (IRS-104, Maintenance, Low)

Relies on: IRS-197

4.9 Preservation

4.9.1 User story: As an asset manager/archivist of the current day and the future, I would like the confidence that the digital copy I deposit is stored redundantly, so that when one copy suffers destruction or unwanted changes, I still have other good copies to restore from. (IRS-108, Preservation, Critical)

Relies on: IRS-192, IRS-199, IRS-200, IRS-202

4.9.2 User story: As an asset manager/archivist of the future, I would like to know what the intellectual value of the asset is to the institution at the time of deposit, so as to obtain guidance in evaluation of it for current value for the institution. (IRS-112, Preservation, Critical)

Relies on: IRS-135, IRS-204

4.9.3 User story: As an asset manager/archivist of the current day and the future, I would like the assurance that funding and staffing of the IR have a commitment to longevity of the repository through published plans and/or explicit contract clauses. (IRS-114, Preservation, Critical)

Relies on: IRS-206

4.9.4 User story: As a data curator I would like the ability to upload a new version of an item that has changed, while still allowing old versions to be accessed. (IRS-117, Preservation, Critical)

Is related to: IRS-15, IRS-62, IRS-74, IRS-92

Relies on: IRS-132, IRS-146, IRS-199, IRS-213

4.9.5 User story: As an asset manager/archivist of the current day and the future, I would like to be assured that threats to copies in one repository are not automatically incurred by the redundant copies (usually satisfied by geographical separation of redundant repository storage). (IRS-109, Preservation, Major)

Relies on: IRS-192, IRS-199, IRS-201

4.9.6 User story: As an asset manager/archivist of the current day and the future, I would like to be assured that the redundant copies are continuously monitored for unwanted changes, and that if/when changes do occur, there is a mechanism by which the original can be found, restored, and replicated. (IRS-110, Preservation, Major)

Is related to: IRS-111

Relies on: IRS-201, IRS-202

4.9.7 User story: As an asset manager/archivist of the current day and the future, I would like to be assured that the assets can be taken out of the repository, and that the assets taken out are the same as those that are put in. (IRS-111, Preservation, Major)

Is related to: IRS-110

Relies on: IRS-199, IRS-203, IRS-211

4.9.8 User story: As an asset manager/archivist of the current day and the future, I want a mechanism to obtain a listing or understanding of all the assets that have been deposited, and their current status. (IRS-113, Preservation, Major)

Is related to: IRS-171

Relies on: IRS-133, IRS-170, IRS-201, IRS-205

4.9.9 User story: As a stakeholder in the future, I would like to have files adequately described so I can successfully render them in my contemporary operating environment. (IRS-115, Preservation, Major)

Relies on: IRS-207

4.9.10 User story: As a library staff member I want to generate sustainable links that will not succumb to link rot to preserve access to deposited scholarship. Our current belief is that the best way to achieve this is through DOIs. (IRS-118, Preservation, Major)

Relies on: IRS-127, IRS-221, IRS-222

4.9.11 User story: As a library staff member, I want to preserve both the content and the metadata within the repository in a robust manner, in order to provide stable, long-term access to this material. (IRS-116, Preservation, Low)

Relies on: IRS-224

4.10 Sustainability

4.10.1 User story: As a library staff member, I want to create a collection, sometimes with custom metadata fields, in order to house digital material for wider distribution. (IRS-119, Sustainability, Critical)

Relies on: IRS-135, IRS-137, IRS-156, IRS-159

4.10.2 User story: As a library staff member, I want to trace the list of revisors to determine who uploaded an item to the repository, in order to confirm that proper procedures were followed. (IRS-120, Sustainability, Critical)

Relies on: IRS-146

4.10.3 User story: As an asset manager/archivist of the current day, I would like the assurance that there is a formal plan for the disposition of assets if the IR should cease. (IRS-121, Sustainability, Critical)

Relies on: IRS-160

4.10.4 User story: As an asset manager/archivist of the current day and the future, I would like a mechanism to pass ownership/management of the assets to a successor. (IRS-122, Sustainability, Critical)

Relies on: IRS-133

4.10.5 User story: As a patron, I want to email system provider to report issues and ask questions. (IRS-123, Sustainability, Critical)

Relies on: IRS-161

4.10.6 User story: As a data curator I would like the ability to upload a new version of an item that has changed, while still allowing old versions to be accessed. (IRS-125, Sustainability, Critical)

Relies on: IRS-146, IRS-213

4.10.7 User story: As a data curator I would like a mechanism to allow for records scheduling for items that do not need to be stored indefinitely. (IRS-124, Sustainability, Low)

Relies on: IRS-162