I. Review of Agenda

1. Workflow
2. ID management and ePeople
3. Authorization & Policy Implementation
4. Other?

II. Workflow

See diagram at []

1. Current Ingest "Workflow"
   - Submission
   - "workflow" (post-submission)
   - install

2. Event Mechanism (Larry Stone, MS, RR)
   - a general purpose notification system
   - policy driven
   - customizable

3. History System
   - creates an audit trail
   - follows an ABC ontology
   - writes to triple-store

4. Preservation

5. Versioning

6. Issues
   **what** are the first-class items we’re worried about for long-term preservation?
   - establishing precedent for life-cycle management; not much experience in the field
     - lifecycle management currently is done poorly in all systems
   - little things (improving current workflow) vs big things (event mechanism)
   - future robust content integrity service
     - where do the artifacts

7. Providing hooks and innovations that enable experimentation in this area

**RECOMMENDATION:** Move towards improving some sort of improved history system
   - which includes rigorously improved event system

8. Discussion of relationship between versioning, events and history system
   - Q: what do we get from a

9. Workflow: There have proposals to RIP OUT DSpace workflow "engine"
   - and replace with third-party system
   - (rob) brief history of dspace workflow system
   - (rj) definitely need more flexible workflow capability
   - (sp) degree to which Manakin helps
   - (rob) BUT aspects are baked into data model

10. Workflow: (rob) Opportunity to use flexible workflow system for implementation e.g. preservation workflows, etc.
    - (ms) Also: a generic workflow system would help untangle administration system

**RECOMMENDATION** (ms) Keep “lightweight” system whilst enabling access by other systems via LNI??
   - Or: re-implement "Workflow" module in DS based on third-party, open-source workflow engine & language
     - e.g. OpenWFE
• e.g. Enhydra Shark
• e.g. Lenya
• etc...

Q: Are there any plugin mechanisms that work esp well with any workflow systems, etc?
• (md) See Open Symphony
  *Do as much as we can to improve workflow with Manakin
  *Investigate and recommend a third-party open-source workflow engine

11. Identify Management (hj)

• (hj) trouble with changing eperson records
  • changing email addr, etc
• (jse) what is req’d? what is ‘identity” used for?
• permission control (persons and groups)
• “role” management
  • permissions and responsibility
  • auditing (events/history)
  • eperson record is the source of the data
  • who did what (name, email)
• authority control
• persistent query
  • notification services
  • creator metadata
• every item has the submitting ePerson

• (jse) how is “role” specified?
• policy table
  • eperson/group, action, object
• problems occur with administration

• relationship between DSpace ePerson and e.g. LDAP
• protected data in record

• (rob) Three basic ways that identity manifest
  • There is the "stuff" to do with roles and permissions
    • getting authoritative assertions from third-party services
  • Records in the metadata
    • different set of issues
  • Notifications
    • e.g. email address
    • (rj) could abstract how notifications are done

RECOMMENDATION: It would be useful to have persistent IDs for ePeople

• that are valid URIs
  • format that the URIs could take
• aggregating metadata associated with ePerson
• should they be actionable
• they could be handles
• they could be managed by some other system
• Reminder: “Out-of-the-box” is in the manifesto
• Application-specifiable
  • format
  • some way of minting them
• Ways of importing epeople?
• (ms) making people equivalent to items

• (ms) What about the Info URI system the Rob proposed years ago
  • See “info” URI scheme

12. Authorization

• (ms) today we have a home-grown but okay for “version 1” solution
• do we re-factor for “glamorous”?
• do we fix specific problems?

• (rob) what do permissions really mean?
  • e.g. what are the semantics of a particular permission
  • bigger problem is managing permissions, ui, etc
  • there are certain inconsistencies in management
  • set of behaviors that are undocumented; e.g. changing permissions on collection, impact on other
  • whole load of unconfigurable, invisible baked-in logic
  • roles and permissions are conflated, which makes making a UI hard
  • (rj) can roles be aggregations of permissions, to which people are assigned?
  • set of actions that are distinguished
    • roles and actions are currently mixed up, need to be clarified
    • these defined roles, these defined permissions
  • (rj) do we need a way to define roles?
• are e.g. WfS1, WfS2 states or actions or????
**RECOMMENDATION:** Current conflation isn’t working

- do we incrementally change vs refactor and adopt
- Clean up/carry specification of model
- re-implement (or tweak) based on cleaned model

- Rob: strawman model
  - role, permissions, objects, actions
  - eperson, group

**RECOMMENDATION:** For workflows, rely on the AuthZ engines of an adopted Workflow Engine

- Conversely, make Workflow AuthZ a criteria/requirement of Workflow Engine selection
- (rj) presumably such an AuthZ is specific

13. Topics for Thursday and Friday

- in the perfect world, setting up a Community is a workflow step
- also, extending
  - Abstract data model
    - communities/collections
    - bitstream relationships
  - concrete data model & storage
  - history, provenance, audit
    - admin, curatorial -> workflow
- Friday:
  - requirements