

Agents Working Agenda

Resources

- [Zoom Room](#) Meeting ID: 925 4485 9519
- [Agent Committee Github Project](#)
- New Agent Cleanup Google Sheets - [Agent Cleanup - Orgs and Other](#)

2024-08-14

Participants

Agenda

1. Code Table Request - Replace Agent Attributes: last name with surname - [#7477](#)
 - a. Dusty wants to do it all at once. Can we file an issue for first name or cover it in this issue and get this done?
 - b. See also [#7411](#)
2. New Agent Attributes: event values are confusing - [#7437](#)
3. Add Arctos id to agent picks - [#7717](#) (This has been labeled as next task, but if it isn't done by next month Teresa will close as not relevant to the community).

2024-07-10

Participants

Teresa, Jessica W., Dawn

Agenda

4. [Workshop Report: Supporting inclusive and sustainable collections-based research infrastructure for systematics \(SISRIS\)](#)
5. Code Table Request - Replace Agent Attributes: last name with surname - [#7477](#)
 - a. Dusty wants to do it all at once. Can we file an issue for first name or cover it in this issue and get this done?
6. Feature Request - wrap names in agent search results - [#7774](#) (Closed)
7. New Agent Attributes: event values are confusing - [#7437](#)
8. simplify agent relationship attributes - [#7651](#) (Closed)

Agents Working Agenda

9. add Arctos id to agent picks - [#7717](#) (This has been labeled as next task, but if it isn't done by next month Teresa will close as not relevant to the community).

2024-06-12

Participants

Dawn, Jessica W., Teresa

Agenda

I was late and everyone had other things to do - so we canceled and will take this stuff up next month.

2024-05-08

Participants

Teresa, Jessica, Dusty, Beth

Agenda

1. <https://github.com/ArctosDB/arctos/issues/7028>
 - a. Maybe ask for an agent attribute loader instead?
2. <https://github.com/ArctosDB/arctos/issues/7437>
 - a. Can we do something that works here and either simplify or at least make the information from life events more useful for data quality algorithms?
 - b. Lets think about life events for next month's meeting
 - i. Try it out and see what it looks like
 1. For both dead agents and alive agents
 - a. For alive agents -> maybe position dates?

Meeting Chat

14:35:08 From Elizabeth Wommack to Everyone:

Different dashes: <https://www.compart.com/en/unicode/U+2014>

14:36:26 From Elizabeth Wommack to Everyone:

Here's a longer one: <https://www.compart.com/en/unicode/U+2E3A>

14:48:34 From Dusty M to Everyone:

attribute_value | count

-----+-----

Agents Working Agenda

alive		3359
birth		2
born		2598
dead		218
death		2
died		1889

2024-04-10

Participants

Mariel, Teresa, Dawn, Beth, Dusty, Erica, Jessica, Michelle

Agenda

3. [Feature Request - agent pick behavior](https://github.com/ArctosDB/arctos/issues/7458) and also related <https://github.com/ArctosDB/arctos/issues/7458>
 - Dusty is switching to the API in the next release. May get a bit better, will be trying to be more specific.
 - Issue #7434 - maybe try something with allowing for more specific searches.
 - Maybe a box that allows you exclude parts of the agent info fields, e.g. “exclude addresses from this pick”
 - Again - a work in process, and the search will get better as we learn how people are needing to search through the new data available from Agents.
4. [Code Table Request - Agent attribute - add culture of origin attribute to agents](#) - needs DBA approval
 - Where do we want this data to go?
 - Identification -> does not fit as well in there
 - Addresses -> allows for free text with the rest of the free text addresses
 - But not sure if this would be something that curatorial makes sense that would something you would look for under Addresses
 - Other -> also free text, but makes more sense than Addresses
 - Agreed to put it under the Other category.
5. funky agents [#7649](#)
 - How much do we care?
 - How did these happen?
 - Some of these are probably results of Dusty recreating the verbatim agents for collections. So that is creating dupes, and we understand the problem.
 - Article in the Newsletter about adding data and information to agents, and what is the important reason for doing that.

Agents Working Agenda

- Add a paragraph that if you do accidentally create a duplicate agent -> mark the problem agent as “bad duplicate of”
- <https://github.com/ArctosDB/newsletter/issues/275>
- Ask for help from people who have accidentally created an agent -> how did that happen (e.g. Allison Nelson and John Dunnum)
- 6. <https://github.com/ArctosDB/arctos/issues/7550>
 - Threshold for verification and for accepted?
 - A combination of things
 - An alive date
 - An relationship with a date
 - A date that marks some information in the Agent information
 - An ORCID and Wikidata
 - Dusty will do some automatic assigning for verified using the ORCID and wikidata.
 - Wait maybe hold up.
 - Think about different levels of status:
 - Verified / unverified -> human examined, actively being managed, don't mess with this unless you know what you are doing.
 - Accepted? What are we using this for? Maybe take this out.
 - Disambiguated and ambiguated -> machine examined
- 7. Feature Request - simplify agent relationship attributes [#7651](#)
- 8. [Feature Request - New Agent Attributes: event values are confusing](#)
- 9. [Feature Request - get agent data from Wikidata](#)
- 10. [Code Table Request - Add Family Name to Agent Attributes](#)
- 11. [Code Table Request - New Agents and Agent Attributes - Add Pronouns to new Agent Attributes](#)
- 12. [Agent request: create threshold for verified status](#)
- 13. [Feature Request - New Agent "unrecorded"](#)

Meeting Chat

14:02:25 From Dusty M to Everyone:

I hear apparently can't talk....

14:24:04 From Dusty M to Everyone:

```
arctosprod@arctos>> select purpose from ctagent_attribute_type group by purpose
order by purpose;
```

```
purpose
```

```
-----
```

```
address
```

```
event
```

```
history
```

```
identifier
```

```
name
```

```
other
```

Agents Working Agenda

relationship

(7 rows)

14:28:07 From Dusty M to Everyone:

(142 rows)

14:33:39 From Dusty M to Everyone:

```
arctosprod@arctos>> select attribute_value,count(*) from agent_attribute where
attribute_type ='status' group by attribute_value;
attribute_value | count
```

```
-----+-----
accepted      |    22
unverified    |     1
verified      |   433
```

14:47:27 From Elizabeth Wommack to Everyone:

Ooooh I just realized -> with the meteorite collections, we may eventually have an organization that has an address that is from another planet!

14:48:42 From Jessica Weller (ChAS) to Everyone:

Reacted to "Ooooh I just realize..." with 😬

14:53:17 From Michelle Koo to Everyone:

<https://github.com/ArctosDB/arctos/issues/7550>

14:56:14 From Dusty M to Everyone:

imondi@coastalmarinebiolabs.org | 43

2024-03-13

Participants

Beth W, Teresa MM, Dawn R, Jessica W.

Agenda

1. So far no issues using the new system.
2. Discussed deceased - <https://github.com/ArctosDB/arctos/issues/7437> and found some interesting uses for "dead".
3. I will cancel next month's meeting if it looks like we don't have anything to work on.

2024-02-14

Participants

Dawn R, Jessica W, Teresa MM, Erica K, Dusty M, Beth W, Michelle K

Agents Working Agenda

Agenda

1. Check out the new Agent model - <https://arctos-test.tacc.utexas.edu/agent.cfm>
 - a. Send an announcement about the new Agents system - add screen shots of the new system - and say to see it in demo please come to the AWG Meeting on the 22nd of February.
 - i. Maybe a screenshot with a star agent, the new attribute addition page, and the new search page? Agent page search page search results
 - ii. Add note that launch of the new system will be 26th February.
 - iii. Add comment or requests here - <https://github.com/ArctosDB/arctos/issues/7352>
2. Agent cleaning tools
 - a. Add these tools to the demo at the AWG meeting
 - b. Agent PreBulkloader - will spot if there are duplicates of a name for an Agent
 - i. Will no longer have the "fatal error" info
3. New complaint
 - a. Verbatim agents that used to be agents and converting them back
 - i. Easy to do
 - ii. But we need a strategy
 - iii. Add an AWG announcement that if you have agents that you want converted back to full Agents, please file an issue so we can track the progress. Will that work?
 1. If you want your entire collection verbatim agents converted back to full Agents file an issue so we can track the request.
 - a. It is possible, but we would like to have a record of the change, and confirmation from the people from the collection that they want this.

2024-01-09

Participants

Teresa, Dusty, Beth W., Erica K., Jessica W., Rosie P., Dawn R., Michelle K., Derek S.

Agenda

After the [Bionomia webinar](#), Michelle, Dusty and Teresa were thinking about Agents and what could end the current anxiety over the "required" use of verbatim agent when little is known about an agent.

Please read these before coming to the meeting if you can!

[Arctos Agents - Functional Requirements](#)

Agents Working Agenda

Arctos Agents Roadmap

We hope that we can at least reach an agreement on how to end the current situation and be happy with whatever happens after that.

See [Agent Attribute Experiment](#)

Discussion During Committee Meeting

- Standard Agent names creates better data -> merging verbatim and non-verbatim agents will lose standardization of the data.
- Problem of verbatim agents not appearing in the search results for downloadable data in a search results in the same column as Collectors/Preparators/Identifiers
 - Using the Summarize By... function in Arctos.
 - Summarize by Collector in a Catalog Record Search
 - Look up names on all of the people who have donated material to your collection
 - Can search both verbatim and formal agents using the Agent Search
 - Catalog Record Search - Agent Field will allow you search both verbatim and formal agents now.
 - So next step is to make it possible through the Summarize Catalog Record Search?
 - Also allow for Verbatim Agents be accessible in a data download the same as the Collector Field
 - Possible fix would be to allow FLAT of Verbatim Agents and FLAT combination of Verbatim and Formal Agents
- Verbatim agents are not shared with Data Aggregators.
 - Verbatim Agents are in the attribute fields, not in the same field where formal Agents are listed as Collector/Preparator/Identifiers
 - Can we map verbatim agent field to the collector/preparator field in the Data Aggregator info? So they show up in the same field in GBIF, iDigBio, etc.
- Is there a way to merge the Verbatim and Formal Agent Fields?
 - For a Catalog Record Search
 - For Data Aggregators
- With Verbatim Agents - you may have multiple ways that one person writes their name, but there is no way to link all of those different spellings together. In Verbatim Agents there is not a big way to link different verbatim agents that may be the same individual.
- How to handle updating a Verbatim Agent to a Full Agent?
 - If you get more info you can create a Formal Agent and link them to all of the Verbatim Agent Records, but keep the Verbatim Agent as well, so the records have both Formal and Verbatim Agents.
- Simplify the work flow for how to convert verbatim Agent to a formal Agent would be helpful for clean up of agents.

Agents Working Agenda

- Make sure that keep Data Record Reports that flag Agents with problems attached to collection objects
 - Ones that are tied to objects that fall outside of their year of collection
 - Ones that are tied to objects that are part of a different type of collection from the collections that they are already associated with

Agreed upon next step to focus on is this point below.

- A way to identify high quality and low quality Agents notices [see Agenda notes from last Agent Committee Meeting] that would be something you could apply when you create an agent.
 - Or curated Agent
 - Or managed by this collection/collector
 - Create a relationship between the created Agent and the curatorial Agent who created/managed them.
 - Maybe also allow for locking of Agent
 - Similar to the verified lock from Georeferenced localities
 - What specific flags do we need?
 - Need a multiple level tiers -> no data, low quality, medium quality, high quality, locked - super duper
 - Are there specific natural flag that we can pull out and use?
 - No we need a specific flag that a collection can tick off

Meeting Chat

14:01:48 From Teresa Mayfield-Meyer to Everyone:

<https://docs.google.com/document/d/1-nssmG4VRJFP8Ek1wPDzfkpDoqLMs3eR/edit>

14:31:56 From Michelle Koo to Everyone:

yes

14:38:19 From Elizabeth Wommack to Everyone:

We've got a fire alarm test happening soon if you see lights flashing

14:43:54 From Elizabeth Wommack to Everyone:

I think some collectors specifically use both verbatim and the formal agent together.

Same as we do locality verbatim and specific locality

14:44:06 From Erica Krimmel to Everyone:

Reacted to "I think some collect..." with 100

14:44:18 From Jessica Weller (ChAS) to Everyone:

Reacted to "I think some collect..." with 100

14:54:45 From Teresa Mayfield-Meyer to Everyone:

Angie is definitely curating agents.

14:56:22 From Elizabeth Wommack to Everyone:

Reacted to "Angie is definitely ..." with 100

14:59:34 From Derek Sikes to Everyone:

Agents Working Agenda

here's a specimen cited in 2 publications with a DNA sequence link but the collector is a verbatim agent only: <https://arctos.database.museum/guid/UAM:Ento:65871>

2023-08-09

Sign in: Beth, Teresa, Lindsey

Announcements:

- We're still listed as 1:30 - 3:00pm. Do we want to change that? Yes, updated

Projects:

• Issues

- <https://github.com/orgs/ArctosDB/projects/16/views/1>

• Membership:

- <https://github.com/orgs/ArctosDB/projects/46/views/1>
- <https://github.com/orgs/ArctosDB/projects/17>

Notes:

- Need verbatim agent everywhere agents are used - but this is going nowhere. I don't have answers (Teresa) and we can't stop this - <https://github.com/ArctosDB/arctos/issues/6563> Michelle is concerned that we make it too hard to get data into Arctos and I really feel like people do not understand how the verbatim agent attribute works or even what it is. Sigh - can you tell I'm exhausted with this?
 - This is what you do when you have an agent or a verbatim agent document
 - Verbatim agent for publication, still have participation begin and end dates and remarks
- Requested Dusty to get list of collections without member council

Agent Cleanup:

- Working on agentifying organizations
- <https://github.com/ArctosDB/arctos/issues/5283>
 - Waiting on bulkloader rebuild and attributes to be made in identification table
 - Then need to create verbatim determiner code table request
 - Then we need to do first sweep of determiner clean ups
 - Then we need to do another sweep of determiner clean ups that include agents that only have a status or just one relationship (to catch all the sneaky additions like this one <https://github.com/ArctosDB/arctos/issues/6411>)

Agents Working Agenda

2023-07-12

Sign in: Lindsey, Teresa

Announcements:

- Network might go down for me - Lindsey
-

Projects:

- **Issues**
 - <https://github.com/orgs/ArctosDB/projects/16/views/1>
- **Membership:**
 - <https://github.com/orgs/ArctosDB/projects/46/views/1>
 - <https://github.com/orgs/ArctosDB/projects/17>

Notes:

Need verbatim agent everywhere agents are used

This is what you do when you have an agent or a verbatim agent document

Verbatim agent for publication, still have participation begin and end dates and remarks

Agent Cleanup:

- Working on agentifying organizations
- <https://github.com/ArctosDB/arctos/issues/5283>
 - Waiting on bulkloader rebuild and attributes to be made in identification table
 - Then need to create verbatim determiner code table request
 - Then we need to do first sweep of determiner clean ups
 - Then we need to do another sweep of determiner clean ups that include agents that only have a status or just one relationship (to catch all the sneaky additions like this one <https://github.com/ArctosDB/arctos/issues/6411>)

2023-06-14

Sign in: Lindsey F, Teresa MM, Dawn R

Announcements:

-
-

Issues:

- <https://github.com/orgs/ArctosDB/projects/16/views/1>

Agents Working Agenda

Agent Cleanup:

- Working on agentifying organizations
- <https://github.com/ArctosDB/arctos/issues/5283>
 - Waiting on bulkloader rebuild and attributes to be made in identification table
 - Then need to create verbatim determiner code table request
 - Then we need to do first sweep of determiner clean ups
 - Then we need to do another sweep of determiner clean ups that include agents that only have a status or just one relationship (to catch all the sneaky additions like this one <https://github.com/ArctosDB/arctos/issues/6411>)
 -

2023-05-10

Sign in:

Announcements:

-

Issues:

- <https://github.com/orgs/ArctosDB/projects/16/views/1>
- Working on split/merge requests
-

Agent Cleanup:

- Working on agentifying organizations

Issue Clean Up:

<https://github.com/ArctosDB/arctos/issues/6150>

- Done - split finished and info added (as much as people felt like adding)

<https://github.com/ArctosDB/arctos/issues/6234>

- Setting as a bad duplicate as with Clint N. Morgan
- Problem with the creation of the agent, but never responded to contact attempt by Teresa.
- In future may want to look into setting new restrictions for agent making. This one used an alive on the first of the year, but not sure what that means.
 - Plus that there was no first name given for the person if they were present in the museum this January.

<https://github.com/ArctosDB/arctos/issues/6112>

- Need more help to double check in Utah why they used the name. Is it the same name or a different name?

Agents Working Agenda

- So yes still needs discussion -> or needs help

<https://github.com/ArctosDB/arctos/issues/6143>

- Leeds from previous issue -> we really need a better way to share info that people with the same name are different people.
- Bright ideas and thoughts are most welcome! Think think think

<https://github.com/ArctosDB/arctos/issues/6148>

- Can we separate any info on the different people out? Sent a request to Andy Doll for help with the bird person, since birds have the most permits. Maybe a paper trail.

2023-04-12

Sign in: Lindsey, Beth, Teresa

Announcements:

Team Discussions will be deprecated on May 8th, 2023. We encourage you to transfer these posts to GitHub Discussions. Read more about this deprecation in our [changelog](#).

Transfer

-
- Verbatim Identifiers - <https://github.com/ArctosDB/arctos/issues/5283>
 - Dusty -> how many low quality agents are just identifiers?
 - Need to know before we run forward with requesting changes
 - Need more help with bringing new collections.
 - Problem not having many agents in Arctos -> difficulty is when there are many potential matches to an Agent name that all have no data and so you cannot tell the difference between them.
 - No longer need an agent determiner for identifier, but is there something better we could do?
 - Maybe make it an attribute of the identification.
 - Start by putting the list of low quality identifiers together so collections can look at it?
 - Teresa is going to tackle the list first
 - First need to also figure out what a verbatim identifier would look like on an record information page.
 - Where would it appear?
 - As an identification attribute?
 - We do not have this yet, but probably coming
 - How would you enter it?

Agents Working Agenda

- Where would you record it in relation to Re-Identifications
-
- After verbatim identifiers the next largest group is transactions.
- Agent matching bulkloader check -> does not look at verbatim agents. Verbatim agents do not have data and so would compound the problem of too many names with no data
- Recommendation -> when bringing in a new collection always bring in all collectors/preparator/identifier/agent as verbatim agent in attributes.
 - Can still add them as a proper agent too, but having the verbatim agent means the original information is preserved in the verbatim agent attribute.
- How to make it comparable for in-coming collections with low-quality agents uploads when they now have to follow the more stringent rules.
 - They can see the low quality agents that are still in Arctos, but they can't add any more
-

Documentation Cleanup:

- [Draft Documentation](#)
-

2023-03-08

Sign in: Teresa MM, Dawn R., Beth W.

Announcements:

- Come to the Documentation-A-Thon! March 14 1-4 PM MDT

Agent Cleanup:

- Working on agentifying organizations

Documentation Cleanup:

- https://docs.google.com/document/d/1NSI9e4-F3Ib_mjCafs6ZhqSvLJJ9zYXAASJyO5SU1dQ/edit

2023-02-08

Agents Working Agenda

Sign in: Beth, Teresa, Dusty, Lindsey

Announcements:

- Meeting will start at 2pm and Lindsey might still be late

Documentation Cleanup:

- New Agent Cleanup Google Sheets - [Agent Cleanup - Orgs and Other](#)
- https://docs.google.com/document/d/1NSI9e4-F3Ib_mjcAfs6ZhqSvLJJ9zYXAASJyO5SU1dQ/edit

Agent Documentation

Waiting on Documentation work till after we've finished the Agent conversation and the new forms and tools are finished.

1. Write up for new Agent cleaning tool needed: <https://github.com/ArctosDB/newsletter/issues/189>
2. Give a screen shot of a verbatim Agent Attribute:

collector
unknown ⓘ
verbatim agent
Agents acting only in method-specified role. Please use the "comment or report bad data" link if you have more information.

Agent	Method	By	Date	Remark	More
0.8. Smith	unspecified collector role	Teresa J. Mayfield-Meyer ⓘ	2022-02-17		<input type="button" value="search"/> ⓘ

Agents Working Agenda

Any part of any name smith		Include verbatim agent? yes
Agent Type [dropdown]	Agent Name Type [dropdown]	AgentID agent_id
Agent Name (prefix with = for exact) non-preferred name		
Agent Remark agent remark		
Used by Collection [dropdown]		
Contact Information and Identifiers any part of any address, url, or identifier		
Agent Status [dropdown]	Match At	Status Date mm / dd / yyyy
Created By created by agent	Match At	Created Date created date
<input type="button" value="Search"/>	<input type="button" value="Clear Form"/>	<input type="button" value="Create Person"/> <input type="button" value="Create Agent"/>

- 0.8. Smith (verbatim agent) [SpecimenResults]
- 0.H. Smith (verbatim agent) [SpecimenResults]
- 11.14. Smith (verbatim agent) [SpecimenResults]
- 8.8. smith (verbatim agent) [SpecimenResults]
- 8.8. Smith (verbatim agent) [SpecimenResults]
- 8.H. Smith (verbatim agent) [SpecimenResults]
- A. B. Smith (person: 21338686) [new window]
- A.B. Smith (verbatim agent) [SpecimenResults]
- A. & C. C. Smith (verbatim agent) [SpecimenResults]
- A. E. Smith (person: 21340046) [new window]
- A G Smith (verbatim agent) [SpecimenResults]
- A. G. Smith (person: 21278746) [new window]
- A G Smith et al (verbatim agent) [SpecimenResults]
- A. H. Smith (person: 21250424) [new window]
- A J Smith (verbatim agent) [SpecimenResults]

nshot example of a

Verbatim Agent Attribute

- Move the “Match” statement in Agent Status to How to Search Agents page:
https://handbook.arctosdb.org/how_to/How-to-Search-Agents.html
- it’s already there. Then take out of the Agent documentation page?
-

Issues:

3. Next Steps: Organizations and one name people like “Jenna”
4. Membership: Anything that needs to be pinged?
 - a.
5. [yearly AWG Member roster reconciliation and reminder](#)
 - a. Group is reconciled
 - b. Bring up AWG list in AWG meeting to see if anyone knows someone who has changed position/institution using the AWG Arctos agent page
 - c. Email reminder for February, draft , need to finalize(Issue <https://github.com/ArctosDB/internal/issues/75>):
 - Hello AWG!
 - The Arctos Working Group (AWG) is the heart of the Arctos community. We depend on at least one member from each institution to receive

Agents Working Agenda

emails and participate in the AWG providing ideas and tasks for the Arctos Consortium and supporting new and current curatorial users of Arctos.

- The AWG hosts monthly meetings and we request participation in Github to foster the exchange of ideas and information. Thank you to everyone who participated in the meetings and we look forward to another great year of collaboration.
 - <https://arctosdb.org/calendar/>
 - Please let this serve as a reminder that you are subscribed to the AWG Google Group. If you need to modify your subscription please visit <https://groups.google.com/my-groups> with the email that you are subscribed with.
 - If you have any questions about the AWG google group, meetings or other questions, please contact the Membership Chair, Lindsey Frederick, at arctos.membership@gmail.com
6. Check out the Agent issues under “Agent Committee Discussion”, there are a lot of them:
 - a. <https://github.com/orgs/ArctosDB/projects/16/views/1>
 7. [Feature Request - Agent name enhancement #4385](#) - improving search parameters
 - a. Change error to say Nothing matched, try first or last name only.

OTHER ISSUES:

Agent Documentation:

Issues come from these projects: Membership and [Agents](#)