



# Monitoring List feature Specifications

## 1 Document versions

Version	Date	Redactor	Description
1.0	13/10/2021	CLQ	Creation
2.0	01/08/24	CL	Modification : <ul style="list-style-type: none"> <li>• Roles</li> <li>• How to add/remove a work to the monitoring list</li> <li>• What data and export format for the monitoring list</li> <li>• Monitoring list and user Profil Setup</li> <li>• Excel file with fields to monitor</li> <li>• Include development for a LOT 2</li> <li>• Delete Annexes</li> </ul>
2.1	03/09/24	CL	Modification: <ul style="list-style-type: none"> <li>• 5. &amp; 8.3 : Users role</li> <li>• 8.2 Fields to monitor</li> <li>• 8.3 Access to Monitoring List</li> <li>• 8.5 Monitoring List set-up</li> <li>• 8.6 Add/remove new works in the ML</li> <li>• ADD 8.9 Usage : Initiate your ML</li> <li>• 12.0 Planning</li> </ul>
2.2	25/11/24	CL	Modification: <ul style="list-style-type: none"> <li>• 7.2 By file name change</li> <li>• 8.4 User set-up</li> <li>• 8.6 Add/Remove new works in the Monitoring List</li> <li>• 8.8 Export of the Monitoring List</li> </ul>

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## 2 Purpose of the document

The purpose of this document is to describe the solution drawn by the members of the workgroup: Update CMO IT Systems. It addresses IDA users of the IDA web application as well as the SFTP users.

The feature is not available through API.

**In Lot 2**, we will consider the future development of access to the monitoring list through the API. It would be much simpler to be able to directly query the database (or even update it to add a work to be monitored) by searching for all works modified since a specific date.

## 3 Context

During the TC of June 16<sup>th</sup>, 2020, Members [SSA, SACD] expressed their wishes to “*create a working group for supporting members in updating their internal system...*”, they “*want to be able to update their own IT systems*”.

A WorkGroup has been created. It counts 4 members from:

- SACD – Sandrine Sandoval
- SIAE – Cina Piani (Alessandra Vitelli since June 2024)
- SSA – Carlo CAPOZZI
- SUISSIMAGE – Martin Hettich

## 4 Objectives

The objective of the Monitoring List feature is to inform IDA users, of changes that occur on specific data, from a list of works of their choice.

Users can select the type of change they want to be notified for, as well as the works concerned by the monitoring. The goal of the WG is to support IDA member societies, in keeping their IT internal systems up to date with IDA and IPI changes.

Due to the variety of Society internal organisation, they do not have the same needs in term of technology. However, they share the same stack: Having the latest accurate and reliable information about a Work registered into IDA.

Some Societies use “simple” works reference database, such as excel files; some others hold solid IT resources and tools.

IDA will provide a list of changes on data and works; societies have an interest for.

The Monitoring List feature aim to notify the IDA users of changes that have occurred into the work references and the fields, controller users from his society have selected.

## 5 Users' role

Note that ONE monitoring list (list of works to monitor) is set up by society, but each user can define their own setup (fields to monitor and fields to export).

NB: A user belonging to CMO is defined to use the "fields to monitor" setup and the "fields to export" setup to generate the automatic export.

- CMO's Controller & Consulting users can access and add or delete a work reference in or from the Monitoring List.
- Only CMO's Controller users can set and amend the edition frequency of the Monitoring List and the user setup to use for the automatic export. Consulting users cannot change these parameters.

Indeed, since the Monitoring List file is used to update the CMO internal IT system, ~~the works list should not be changed by any user to avoid inaccurate or incomplete data being transmitted. This means that the works to be included in the Monitoring List, as well as the frequency to edit the Monitoring List, are managed by Controller users.~~

- Consulting users can set up their own parameters: add or delete fields to monitor in or from the Monitoring List and set and amend the fields to export.

	ADD field(s) to monitor	DELETE field(s) to monitor	ADD work(s) to monitor	DELETE work(s) to monitor	ADD field(s) to export	DELETE field(s) to export	Choose frequency & define a CMO user setup
	User Profile setup		ML setup		User Profile setup		ML setup
Consulting user	Yes	Yes	Yes	Yes	Yes	Yes	No
Controller user	Yes	Yes	Yes	Yes	Yes	Yes	Yes

## 6 Monitoring List files

### 6.1 Which file format?

XML or CSV: These formats are already used to deliver Works export. The file provided for the monitoring list will contain only works concerning the monitored works, focusing on the relevant field changes and during the chosen period.

**LOT 2 - CSV LOG**: This format is already used to deliver daily logs. The file provided for the monitoring list will filter only the logs concerning the monitored works, focusing on the relevant field changes and during the chosen period.

## 6.2 Where to retrieve the files?

- On IDA web application on the Monitoring list page
- On IDA file server on the Monitoring list folder

## 7 Notification of changes

### 7.1 By email

**Users can choose in the My User Profile page**, if they want to receive the “Monitoring list notification”. The mail sent, displays a link through the latest CMO Monitoring list, on the IDA web application.

*Note that it is a parameter to add in the User profile.*

The email to notify the latest monitoring list is available is as below:

Dear [username],

We are pleased to inform you that the new Monitoring List [IDAML\_XXXX] is now available for download on the FTP server.

To access the file, please follow these steps:

1. Connect to the FTP server using your credentials.
2. Navigate to the directory monitoringlist where the monitoring lists are stored.
3. Locate the file named "IDAML\_XXXX".

If you encounter any issues or have any questions, please do not hesitate to contact our support team for assistance.

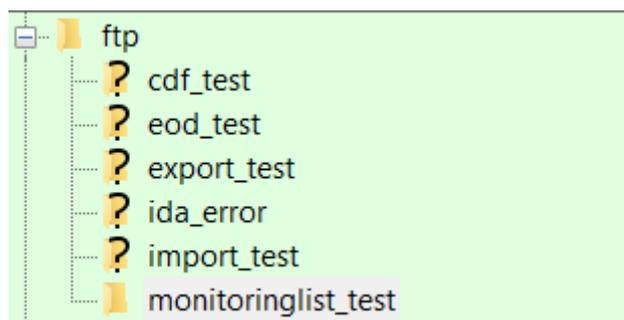
Thank you for your attention.

Best regards,

The IDA team.

### 7.2 By file name change

The Monitoring List files can be retrieved on IDA file servers, from the monitoringlist\_test or monitoringlist\_prod folder.



The file names are incremented with “IDAML”, then the CMO’s code, the two dates between which the change occurred: IDAML\_[CMO Code]\_[Start Date]\_[End Date] and the username of the user;

Example: if XML format has been selected:

- IDAML\_314\_20240225\_20240325\_jDoe.xml (1 month)
- IDAML\_056\_20240512\_20240519\_jDoe.xml (1 week)

**NOTE :** For the global CMO export (the one for the referent) the name is :

GLOBAL\_IDAML\_[CMO Code]\_[Start Date]\_[End Date].xml

Please see section 8.7 to know better about monitoring list exports.

## 8 Monitoring List feature

### 8.1 Action to monitor

Add, update, delete.

### 8.2 Fields to monitor

These areas of interest are:

- Important change of Work Documentation
- Change in Work status
- Minor change in work documentation
- Change in Roles
- Important change in rights situation
- Important change in IPI situation
- Minor change in IPI situation

Users select the fields (one by one) or by area of interest, from the IDA web platform, for their society. The selected fields are those on which IDA will perform the tracking to edit the society Monitoring List files. The selected fields will apply on the society selection of works.

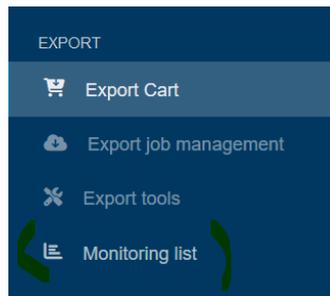
Details of fields are explained in the file IDA\_documentation\_ML\_20240723\_EN.xlsx.

The new feature of the Monitoring List is that IDA provides its members with a tracking of changes that occurred on IPI. **No old and new values will be provided to members**, as IPI information are not logged so only the last value is stored. Members will only be able to track if a minor or major change has been made, thus including impacted works in the export.

IPI information in IDA is up to date each day by synchronizing information from IPI change files.

### 8.3 Access to the Monitoring List

- The Monitoring List have its own page, accessible through the sidebar, on the export section menu items. A Monitoring List menu item will be displayed on the Home page sidebar.



- The list of monitored works appears, depending on your CMO:
  - The page will **allow Consulting or Controller Users to remove** any Work reference from the Monitoring List.
  - It will allow **Consulting or Controller Users to export** the list of the Work references with the fields selected in the User profile.

**LOT 2:** On the screen below, add a search and/or filter function to easily search and sort monitored works.

**Add an upload button to import file.** (file to ADD and DELETE works to monitor)

Monitoring List							Export	Remove selected works
#	IDA Reference	Title	Last change date	Year	25 Works			
3692	31423000044	HEARTLAND	2024-05-07 16:32	2023	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3693	240201038755	Memorias de Idhun	2024-05-07 16:32	2020	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3694	056240000647	test2 title 2	2024-05-07 16:32	2024	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3701	073042572366	DE TINTIN A TITEUF LES MYTHES DE LA BANDE DESSINEE		2004	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3700	073135854359	BELGIQUE-TINTINOPHILE		2013	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3699	055090002221	AFFAIRE TOURNESOL		1965	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3698	073890254834	60 ANS DE TINTIN		1989	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3697	074243188123	Summer '82: When Zappa Came to Sicily	2024-05-24 10:28	2013	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3708	073022311518	G. MARCHADIER DIT TINTIN		2002	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3712	073146364912	HERGE,TINTIN A LA CAMPAGNE		2014	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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### On-demand export:

When the user clicks on Export, a pop-up is displayed with:

- 2 input dates:
  - The first one is the start date and must be filled in by the user.
  - The second one is the end date, and its value is set to the current date by default but can be modified by the user.
- A dropdown list to select which export the user wants: Global XML, Global CSV.

The export will contain all changes occurred during this period.

Nb : As we stored the last date of change concerning IPI, it's possible that the track of some works are missed if you choose an end date different from the current day.

**LOT2** : Add CSV LOG in the dropdown list

## 8.4 User set-up

The setup of fields to monitor and the fields to export are done in the User profile **and in the Manage Users menu for administrators.**

**Note: When a user arrives on the user setup page for monitoring, there is a radio button to enable or disable the use of the monitoring list. If it is not used, all fields are grayed out.**

**Note : A link to download the documentation is provided.**

### Fields to monitor

The page will display the fields to be included in the Monitoring List file and explained in the section 8.2 and in the file IDA\_documentation\_ML\_20240723\_EN.xlsx.

If "right owner" is selected, the list of specific roles is displayed to monitor only certain role. The benefit is greatest for companies that manage only one type of role. If a role is monitored, the monitoring list must track changes to this role, and if the role is deleted or added. Role which are not selected are not monitored.

- The page will display a button radio, user select the format: XML or CSV export.

### Fields to export

A second section, titled "Export Data Monitoring List," will be displayed, similar to "Export Data Filters."

**Titles**

**Keywords**

**Participants**

**Real exploitation**

**Shooting languages**

**Production country**

**Logs**

**Links**

**Controls**

**Comments**

**Society Int. Ref.**

**All distribution modes**

**Include IPI data**

**Personal information**

**IP Nationalities**

**IP Usages**

**Agreements**

**Remarks**

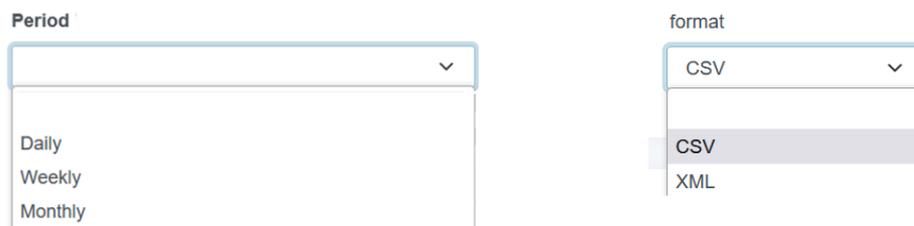
**IP status history**

**Export IPI data only once per export file**

## 8.5 Monitoring List set-up

The setup of frequency, format and user setup to use for automatically frequency is done by CMO controller in the ML set up.

- The page will allow the CMO Controller users to choose the frequency for executing the file (no execution if empty) and to select which format XML or CSV. (XML if empty)



The image shows two dropdown menus side-by-side. The first is labeled 'Period' and has a list of options: 'Daily', 'Weekly', and 'Monthly'. The second is labeled 'format' and has a list of options: 'CSV' and 'XML'. The 'CSV' option in the 'format' menu is currently selected and highlighted.

Exports depend on the chosen period:

- If daily: the export is triggered in the morning and concerns all monitored works updated the day before (past 24hours)

- If weekly: the export is triggered on the first day of the new week (on Monday) and concerns all monitored works updated the week before
- If monthly: the export is triggered on the first day of the new month and concerns all monitored works updated the month before
- The page will display a dropdown list containing the list of Controller users of the society, to choose a Controller user belonging to the company and define its configuration (fields to be monitored and fields to be exported) as the configuration for the automatic export file.
- The page will display in import area to import a file to add or remove works from the Monitoring list (see 8.6, 1)

## 8.6 Add/Remove new works in the Monitoring List

There are **4 ways to add a work**:

**For methods 2 and 3, where you can delete works from monitoring for the entire CMO, add a pop-up warning to inform the user that monitoring for this/these work(s) will be deleted.** Since a consulting user can perform this action, it is important to provide this warning.

**Additionally, for all actions described below, a logging system must be implemented to keep track of the addition and removal of monitored works.**

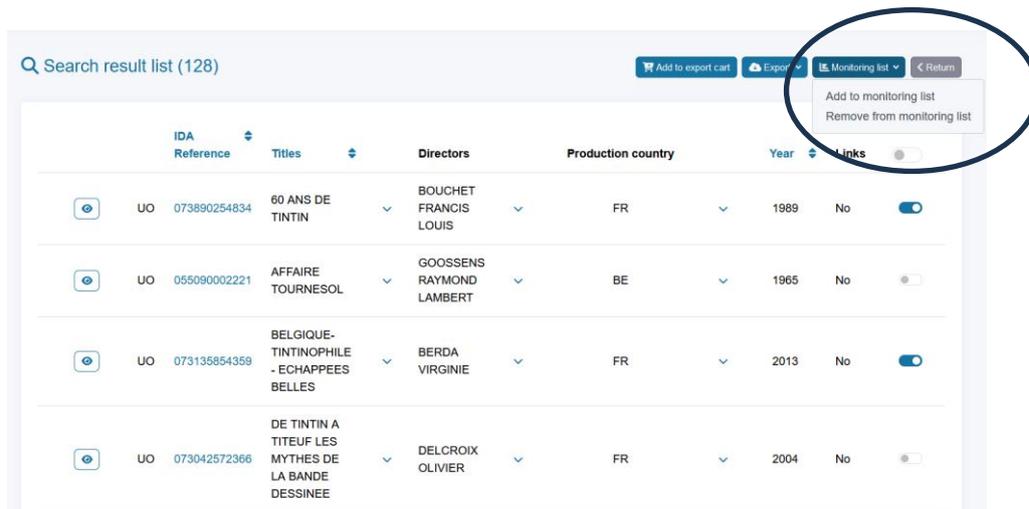
- 1) Each CMO Consulting and Controllers can send a file with reference to add or remove to their Monitoring List. Otherwise, the list is empty by default.

The development consists of to create a file to ADD/REMOVE with work reference to monitor or remove from monitoring list.

This method will be used to initiate the Monitoring list. Works will be added to or removed from the ML of the CMOS's user. It's not possible for a user to manage the ML for another CMO.

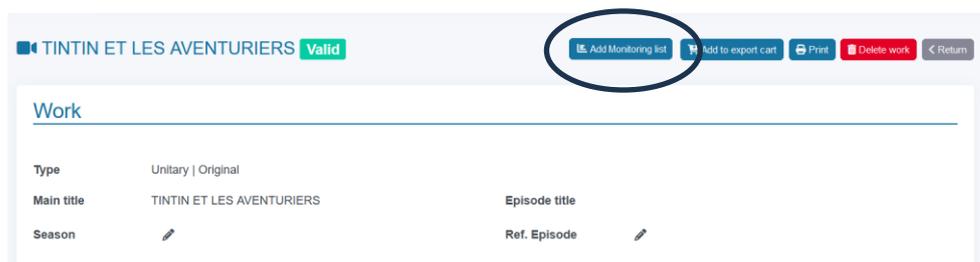
	A	B	C
1	REF_IDA	ACTION	
2	56240000163	ADD	
3	56240000165	REMOVE	
4	56240000100	ADD	
5	56240000121	ADD	
6			
7			

- **2) Search result:** Controller users will be able to add or delete works reference to follow from the “Search Results” page by clicking on a dedicated box.

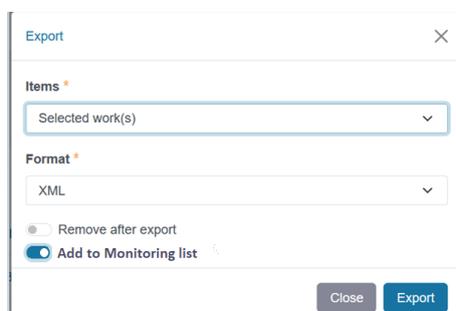


**Note:** In the search result list, add an icon to indicate whether the work is already being monitored or not.

- **3)** Controller users will be able to add a new Work reference into the Monitoring List, **from the Work page** itself by clicking on a dedicated box.



- **4)** When an **export is done from the Export Cart**, a checkbox is available for Controller Users to include the works contained in the export in the Monitoring list. By default, the checkbox is checked.



- **In LOT 2:** The setup of the monitoring list allows adding all works from an automatic export to the monitoring list.

## 8.7 Data included in the Monitoring List export

- For all data, including IPI changes, the export is a **global XML or CSV file** containing all monitored works with changes in the day, week, month, or specific range (depending on the frequency selected in the setup or start date and end date for a manually export). This allows the society to update their own data by a cancel and replace.

*Note that Logs can be contained in these files depending on the export fields setup.*

- **LOT2 : For IDA data,** all changes with the old value and the new value will be provided in the export csv. The export has the same format as the daily log file but the data included depends on the frequency and only includes those concerning monitored works.

	A	B	C	D	E	F	G	H	I
	REF_IDA	DATE	SOCIETY_CODE	USER	EVENT	INFORMATION_TYPE	LOG_TYPE	OLD_VALUE	NEW_VALUE
1	56140333479	2021-11-26 16:18:51	*314	Laquerriere Christine	UPDATED_WORK	TITLES	add		OTHER test monitoring liste   SQ AL
2	56140333479	2021-11-26 16:21:26	*073	Laquerriere Christine	UPDATED_WORK	TITLES	add		OTHER test monitoring liste avec profil scam   BO KP
3	56140052842	2021-11-26 15:54:09	*073	Laquerriere Christine	UPDATED_WORK	TITLES	add		OTHER test monitoring liste   ZU ZW
4	314178E+11	2021-11-26 15:27:23	*073	Laquerriere Christine	UPDATED_WORK	TITLES	add		OTHER test monitoring liste   CA AF
5	73129447932	2021-11-26 15:36:22	*073	Laquerriere Christine	UPDATED_WORK	RIGHT_OWNER	add		00226496356 CM 50 50 ROL 314 0 314 314
6	73129447932	2021-11-26 15:41:44	*073	Laquerriere Christine	UPDATED_WORK	TITLES	add		OTHER test monitoring liste   AA AF
7	73129447932	2021-11-26 15:43:01	*314	Laquerriere Christine	UPDATED_WORK	TITLES	del		OTHER test monitoring liste   AA AF
8	73129447932	2021-11-26 15:47:55	*314	Laquerriere Christine	UPDATED_WORK	RIGHT_OWNER	add		00248173460 CM 25 25 ROL 314 0 314 314
9									
10									
11									

## 8.8 Export of the Monitoring List

- **The Monitoring List updates files will be available in the Files server to in a dedicated folder: Monitoring List. There is a dedicated folder for each society.**
- The Monitoring List page will display a section where Users would be able to download / export the latest Updates files<sup>1</sup> (1 month archive) available. If empty, it means that there has been no change on the Monitoring List selected Work reference over the last month period.

## 8.9 Initiate the ML

- **Step 1:** Import the file described in section 8.6 (1) with ADD action.
- **Step 2:** Export all works from the Monitoring List in section 8.3. (XML file)
- **Step 3:** Update all works in your own system.
- **Step 4:** Set up a schedule to receive works with changes daily, weekly, or monthly.

## 9 Documentation

### 9.1 Corporate Website: <https://www.ida-net.org>

Several articles will be written by the IDA Project Manager to present the feature and explain in detail how to take advantage of it. These articles will be reviewed by the WG members to ensure it is well understood by the IDA Users.

### 9.2 Guides / Documentation

- The current IDA User guide would be updated by the IDA Project Manager. A chapter will be added to explain in detail the Monitoring List feature. The content will be reviewed by the WG members to ensure it is understandable by anyone.
- The current Technical documentation will be updated by the IDA Technical Manager. A chapter will explain in detail the Monitoring List feature. The content will be reviewed by the IDA Project Manager and the WG members, to ensure it is understandable by any technical newcomers.
- The Change Log will be updated by the IDA Technical Manager and reviewed by the IDA Project Manager.

### 9.3 Webinar

A demo or training can be set up by the IDA Project Manager. This would be an opportunity to present the feature to the IDA Users. 3 sessions could be planned on the 3 weeks period and at different time slot to make sure every member from all over the world can attend.

## 10 Risks

Beware of the email server capacity, it would be bad to be identified as a spammer plus it would be bad to lower our infrastructure resources to accomplish this task.

## 11 KPI

In Lot 2, we will consider the future development of provide statistics :

- Numbers of CMO using the feature.
- Number of Members visiting the Monitoring List page on the IDA knowledge base website
- Impact on IDA infrastructure
- Email server
- File server

## 12 Planning

**Test deployment wish date:** late October 2024

**Production deployment wish date:** Late November 2024

**To do:**

- Finalize the specification: SEPTEMBER
- Switch/redevelop the monitoring list code from the Old IDA to the New IDA: OCTOBER
  - o Retrieve the entity.
  - o Retrieve the business logic.
- Redesign front-end (view) : OCTOBER/NOVEMBER
- Finish development: NOVEMBER