RUcore R5.2 Search Portal Requirements
August 2010, Rev. May 2011

I. Principles

Use collections as an organizing factor behind-the-scenes.
Owners have custody of the collections.
Ownership will be expressed via the Owner Record in WMS.
Authors/Creators have intellectual property rights, not necessarily ownership.
All resources should belong to a collection; A resource may also belong to one or more collections.

II. Current implementation

Resources belong to:
RUcore
    RU
    Faculty Deposit
    RUL/SPCOL/Archives
NJDH
NJEDL

Users are unable to search everything in the repository in the current implementation.

III. Changes to RUcore Search Portal

1) Create search portals
There will be three durable search portals (high level) in RUcore.
These have portal IDs, which should come from an authoritative list (not free text). PortalIDs are used to organize materials for searching in our repository.
Research Resources – unique PortalID #1
    Not just data sets
    Original products of research
Scholarship – unique PortalID #2
    Published or publishable
    Faculty articles
    Secondary, tertiary research literature
    ETDs
Digital Collections – unique PortalID #3
    Includes cultural heritage and historical resources
Collection owners portal – unique PortalID #4
    Special portal, not for end-user searching
    Provide subtle link-to from search portal page
    For licensed documents collections and similar collections

A single resource must belong to at least one of these portals (one or two, probably not all three)
Within a resource record, the portalID is repeatable.
Relationships can exist between resources in different portals
Example: Article (scholarship) has supplemental data (research)

**Portal IDs:** Instead of creating a new portalID index, create a database. This table will store the rutgers-lib number and its associated portalID(s). The Portal ID specification is being drafted by Linda Langshied and Grace Agnew.

**Management implications:**
RUcore admin, collection managers, and collection owners need access to the portalID database.
Admin and collection managers need edit access.
Collection owners need view/display access.

**Note:**
Need to apply Portal IDs retrospectively. Some can be applied en-masse by collection.
For on-going portalID assignment, the cataloger will assign the portalID at the time of ingest. The rutgers-lib number and portalID will be linked in the portalID database.

2) **Default search/Display:**

Default search portal in “RUcore” should search all collections (ETD Collections, Faculty Collections, NJEDL) on servers hosted by RUL.
Results list should display the brief records on the right side of the window. The left side of the window should summarize the results list as indicated below:

- **Limit:**
  - Format

- **Sort:**
  - Content model (default).
  - Search Label: Format
  - Concept illustration from World Cat (see side panel):
    - [http://www.worldcat.org/search?qt=worldcat_org_all&q=gone+with+the+wind](http://www.worldcat.org/search?qt=worldcat_org_all&q=gone+with+the+wind)

3) **Advanced search/Display**

Somewhere on Advanced Search page, “Search collections” button that will show collection list.
Collection list should only show top node with expansion option “+”
Instruction to seacher: click on a collection to select it (highlights it). “Search now” button

- a) Collection List should be hidden. Provide an option “+” to open up the collection list (See Image 1). By default, the collections should all be deselected. Remove Check/Uncheck/Expand/Close buttons and add a search button (second one) next to collection list(see Image 2).
b) Add a new Button: The user should be able to select and expand the selected collection to show all the sub-collections. Add a new button labeled **Expand Selected** after **Uncheck All** button (see Image 3).
c) The Expand Selected button should display all the sub-collections in the selected collection(s) (see Image 4).

Image 4

d) Change the button labels: Change Check All to Select All; Change Uncheck All to Unselect All (see Image 5).
e) **Browse Tab**: The users should be able to perform Browse by broad subject terms.

**Browse By Subject**

Subjects taken from Subject Guides (RUL web pages)

Need to apply retrospectively. Some can be applied en-masse.

f) **Search fields**

Subject search on `<mods:subject>`

Title search on `<mods:title>`

Name search on `<mods:name>`

Date** search on `<mods:originInfo>`

Description search on `<mods:abstract>`

Publisher*** search on `<mods:publisher>`

Category/Genre search on `<mods:genre>`

Note search on `<mods:note>`

**If key date, search that**

If no key date, search date subelements in the `<mods:originInfo>` element in this order: dateIssued, dateCreated, dateOther, dateCaptured, dateValid, copyrightDate, dateModified

***Need best practices for articles metadata, including recommending publisher name in publisher element

**Metadata implications:**

PortalID will not be an element in metadata.

Broad subject topics: new subject/topic CV
IV. Partner portals
We will continue to offer/create partner portals
Collection subscription based
New: add individual resources from other collections (but not the whole collection)
Individual resources selected based on individual record ID or indexed term
Select one or more resources
E.g., Browse by subject and select resources from that list (in Partner Portal app)
Partner portal ID and rutgers-lib ID associated in portal database

V. Changes to RUcore Display
1. Collection objects should not be displayed in search results except for the Research Portal, which organizes the display using the collection object in Release 5.2. (Done on test system)
2. In the resource record, display the owner name and hyperlink it with the [owner] URL.
3. Display the [owner] URL dynamically. Pull into record at the time of request (search).
4. Need a label name for Corporate Owner
5. Use partner portal code to customize showfed and complete record display.

Brief Record Display: No change to the default view. Use the Partner Portal code to customize the view for the Research Portal and other portals as necessary.

Showfed Record Display:
Currently it displays DC elements. It should display MODS elements and the elements and the display labels should be configurable.
Sample Complete Record Display:

6. Display limit/sort
   Format (by date, then title)
   Date (by title)
   Title (by date)

Metadata implications:
Subject (broad subject areas)
Content model (search/display label: Format)

VI. Statistics:
We need to be able to gather statistics reports based on the three new portals. We need to be able to run statistics report and gather how many objects belong to Research Portal, Scholarship portal, and Digital Collections Portal and calculate number of downloads etc.