

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

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).

Image 1

Search RUcore

The screenshot shows the Search RUcore interface. At the top, there are three tabs: "Search", "Browse", and "Help". Below the tabs, there are two search input fields. The first field is empty, and the second field contains the text "AND". Both fields have a dropdown menu set to "Full Record". To the right of the search fields, there are three dropdown menus: "Types: All Types of Resourc", "Order by: Relevance", and "Results per page: 10". A "Search" button is located below the search fields. At the bottom left, there is a link that says "Click here to see the collection list".

API Total time: 0.0386

Image 2

Search RUcore

The screenshot shows the Search RUcore interface with a collection list. At the top, there are three tabs: "Search", "Browse", and "Help". Below the tabs, there are two search input fields. The first field is empty, and the second field contains the text "AND". Both fields have a dropdown menu set to "Full Record". To the right of the search fields, there are three dropdown menus: "Types: All Types of Resourc", "Order by: Relevance", and "Results per page: 10". A "Search" button is located below the search fields. Below the search fields, there is a link that says "Click here to hide the collection list". Below the link, there are five buttons: "Select All", "Unselect All", "Expand Selected", "Expand All", and "Close All". Below the buttons, there is a list of collections with checkboxes and expand/collapse icons. The list includes: "Digital Library Repository", "Digital Library Repository General Resources", "Carla and Melissa", "East Asian Library", "Organization Z Collection", "Rutgers University Collection", "Rutgers University Faculty Collection", "Rutgers University Libraries General Collection", "Rutgers University Libraries Special Collections", "SMLR - Library Collection", and "YY-test for handle".

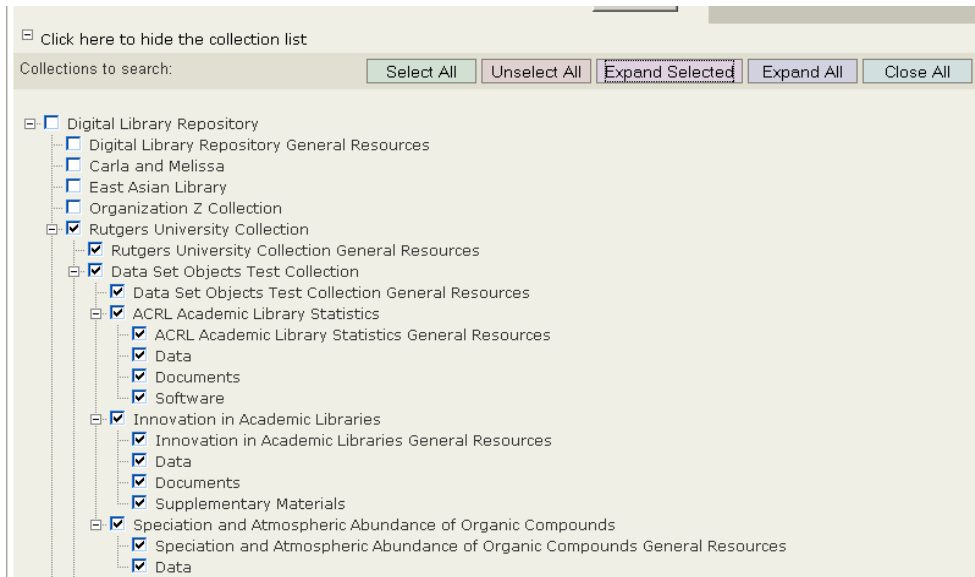
b) Add a new Button: The user should be able to select and expand the selected collection to show all the sub-collections. Add a new button labeled **Expand Selected** after **Uncheck All** button (see Image 3).

Image 3



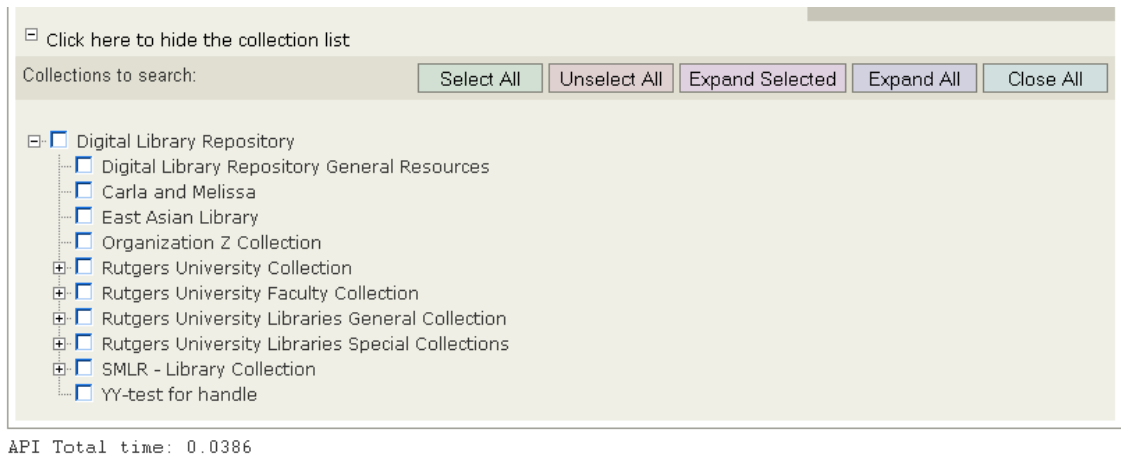
- c) The Expand Selected button should display all the sub-collections in the selected collection(s) (see Image 4).

Image 4



- d) Change the button labels: Change **Check All** to **Select All**; Change **Uncheck All** to **Unselect All** (see Image 5).

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

g) In a later release, each portal will have its own set of search fields and other display defaults.

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

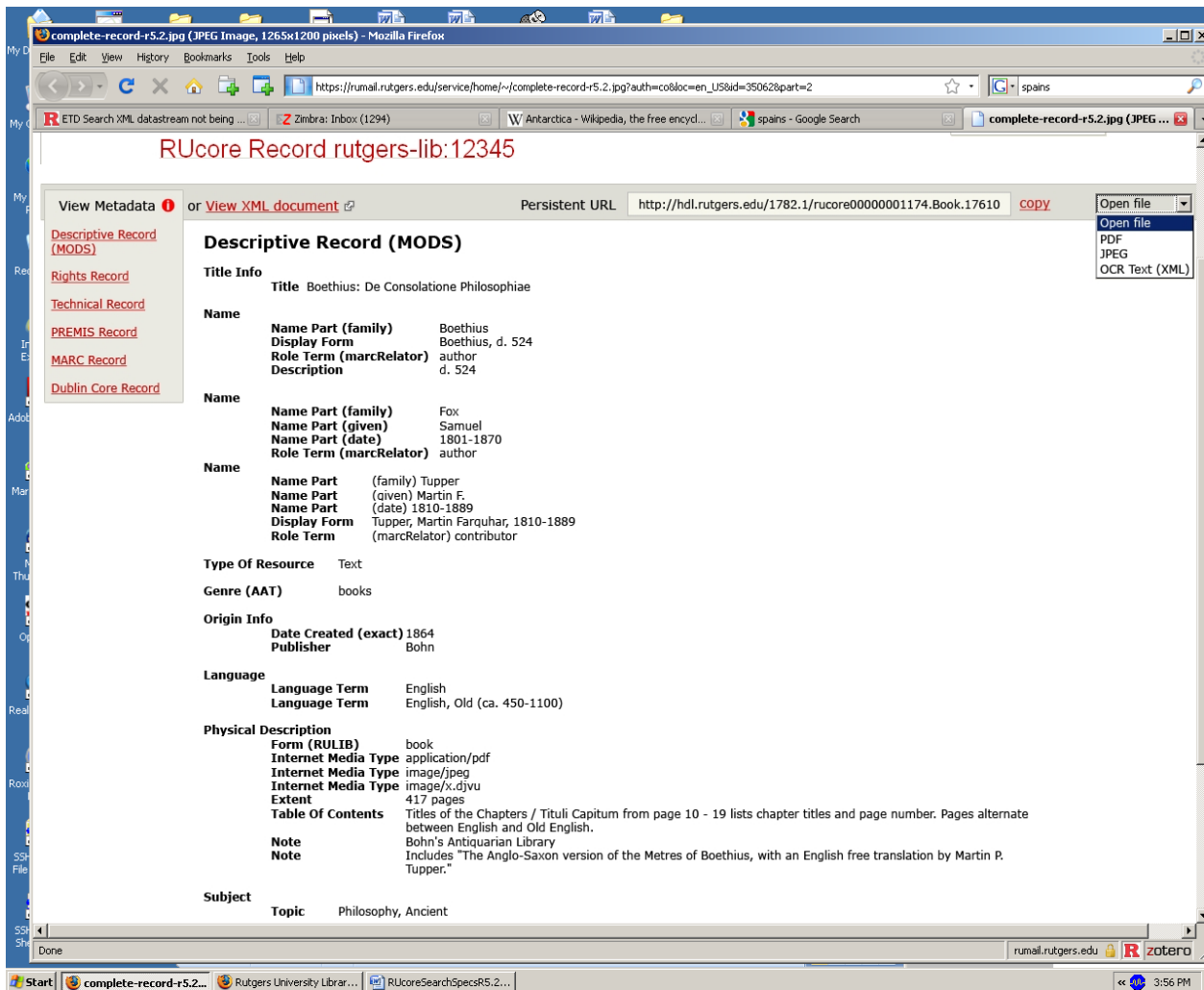
- 1. Collection objects should not be displayed in search results except for the Research Portal, which organizes the display using the collection object in Release 5.2. (Done on test system)**
- 2. In the resource record, display the owner name and hyperlink it with the [owner] URL.**
- 3. Display the [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.