EQUELLA®

Remote Repositories Configuration Guide

Version 6.4

Document History

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Remote repositories overview

The **Remote repository** search allows users to search multiple external sources, including other EQUELLA repositories, for content using a single search query. The results display and can be imported directly into a contribution wizard.

Remote repository searches can be configured to return results from internet search engines, university library databases and online course management systems using the following search types:

- EQUELLA
- Multimedia Educational Resource for Learning and Online Teaching (MERLOT)
- Search/Retrieval via URL (SRU)
- Search/Retrieve Web service (SRW)
- Z39.50

The purpose of this guide is to provide administrators with an overview of the various remote repository search types available and an understanding of their configuration and use.

Please note that this guide has been developed to best reflect the full capabilities of EQUELLA and as such may differ in appearance to your own installation.

Remote repository searches

A feature of remote repository searches is their link to a collection to import search result metadata into. A collection is nominated while configuring the search, into which the search results are imported for contributing to your EQUELLA repository.

Remote repository searches are accessed from the **Search** page drop-down list, or on the **Contribute** page under the collection where selected results will be added. Figure 1 shows the remote repository search highlighted in the search category list (by clicking the **Within** drop-down list), and Figure 2 shows an example external search (e.g. *MERLOT*) listed under the associated collection (e.g. *Learning resources*).
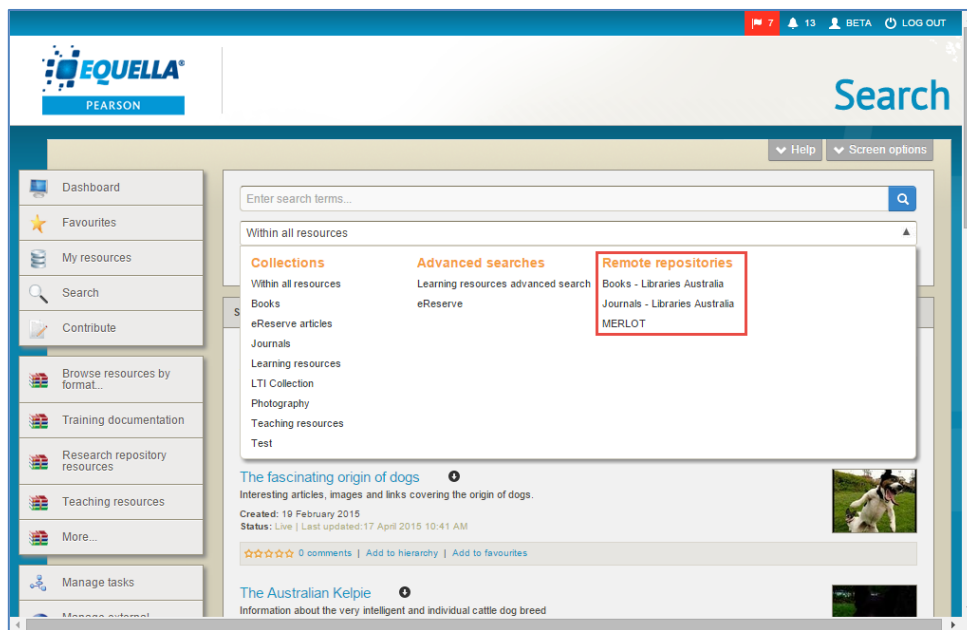
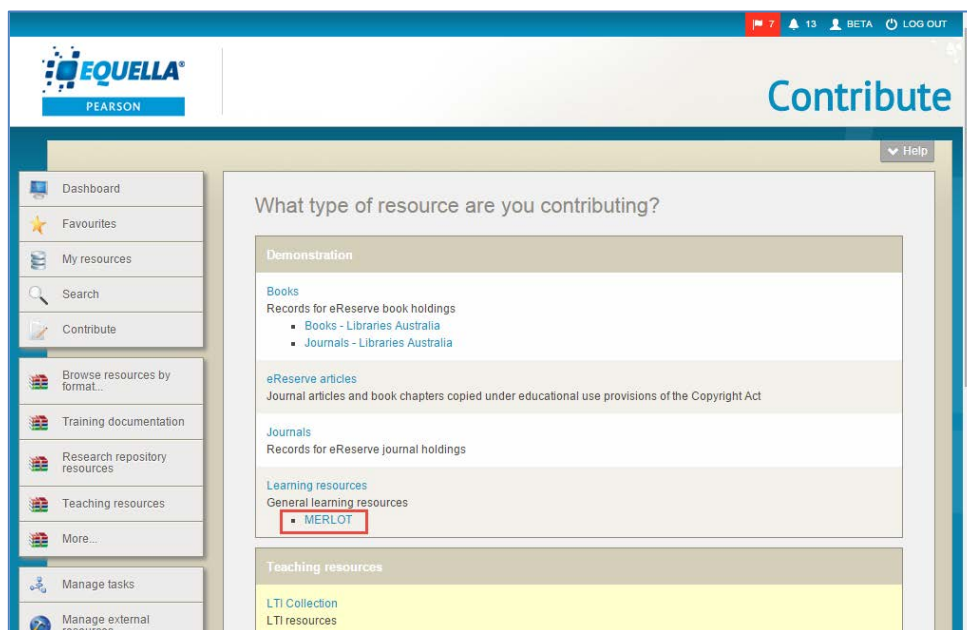**Figure 1 Remote repository search in the search drop-down list**

Figure 2 Contribute page

Selecting the search (e.g. *MERLOT*) displays the search page, with a **Search** box to enter a query, and sorting and filtering options for the result set. The search page can allow basic or advanced searches, depending on the specific search settings and licence.

Entering search criteria and clicking [Q] displays a list of results. An example is shown in Figure 3.
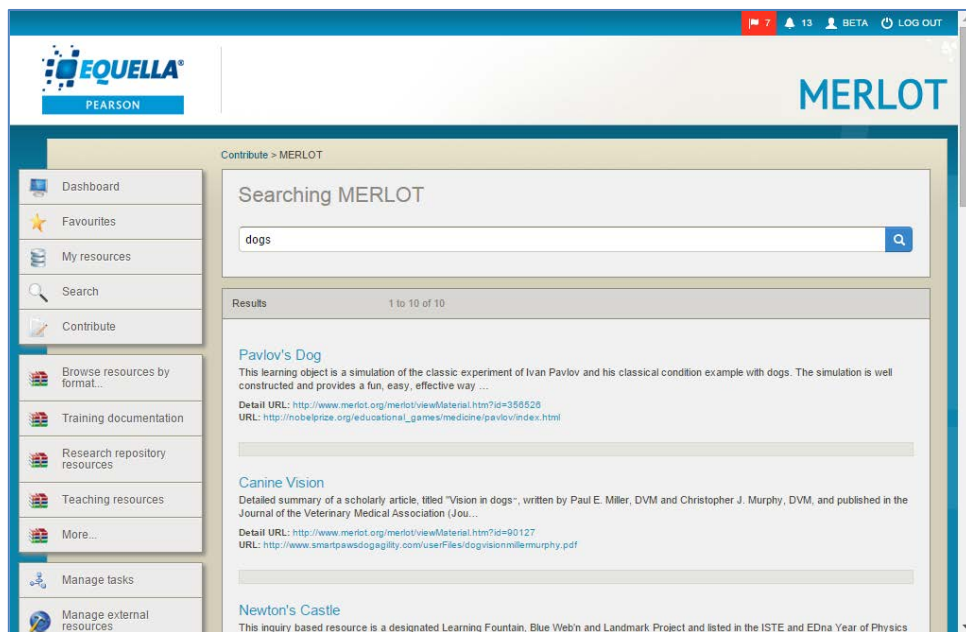
Figure 3 Example of a simple MERLOT search page

Selecting a result displays a selection of the result's information. Import transformations can be configured to adjust which content displays here. Figure 4 shows the data associated with a result from a MERLOT search using the default display with no import transformation set.
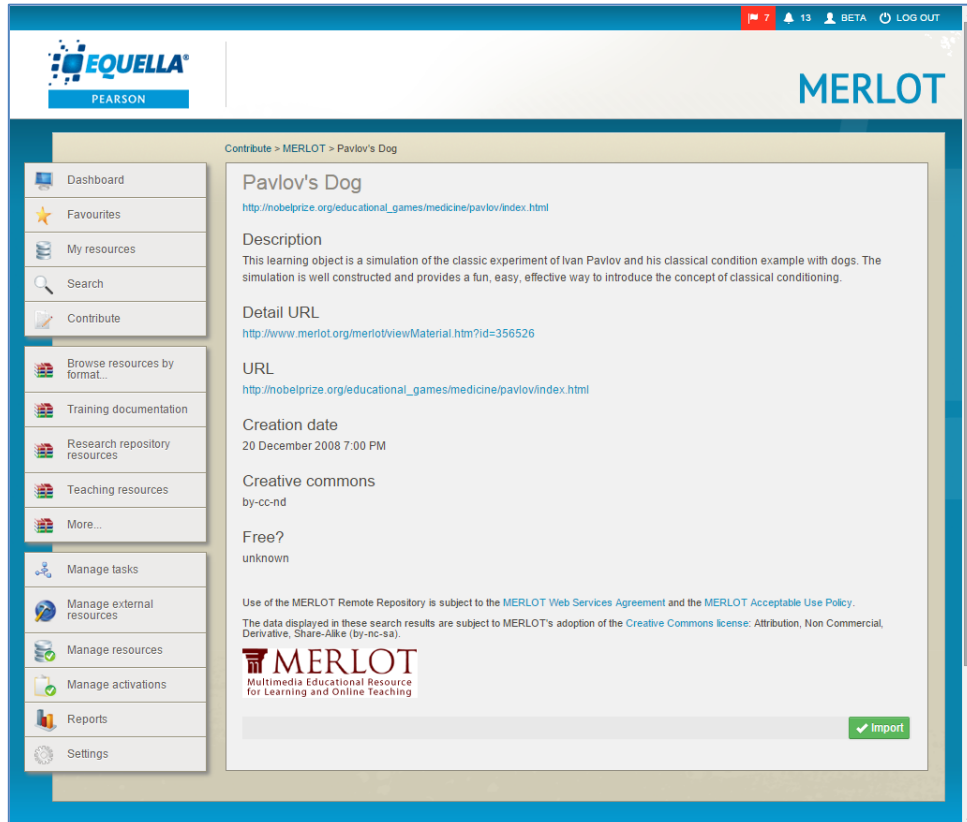

Figure 4 Import screen

Clicking ![Import] displays a contribution wizard. The wizard can be configured to automatically populate fields with the metadata from the imported resource. An example is shown in Figure 5. Regardless of whether the resource metadata is visible in the wizard it will still be saved to the item, and can be retrieved by configuring the display options for the collection.
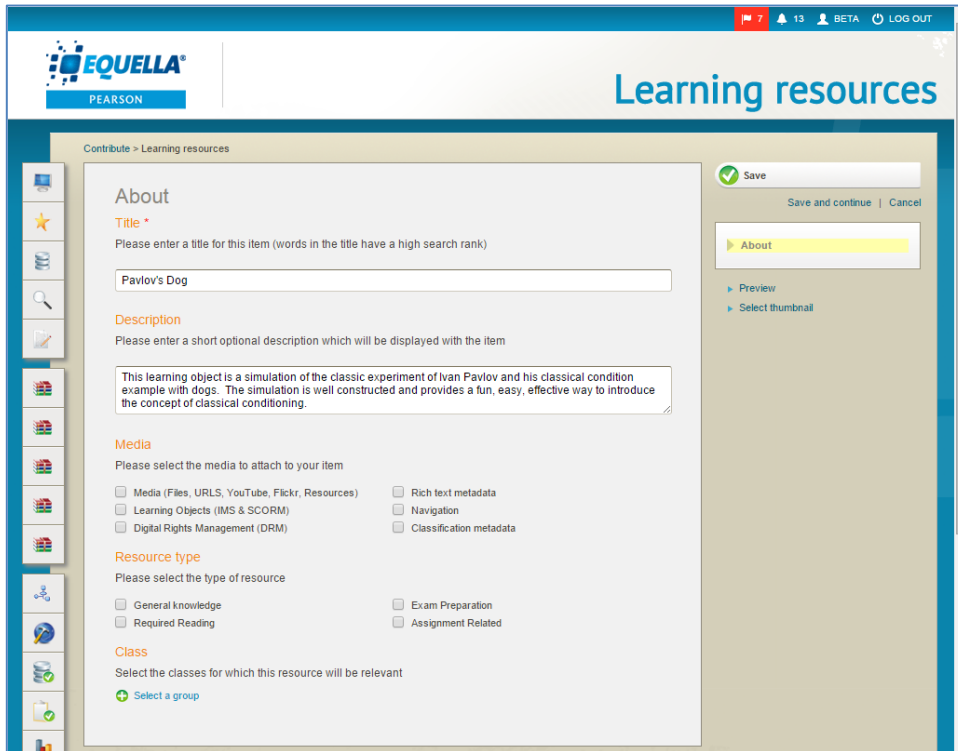

Figure 5 Contribution wizard

Users can complete and publish the wizard as normal to contribute the imported search result to the repository. An example resource summary page of a successfully imported resource is shown in Figure 6.
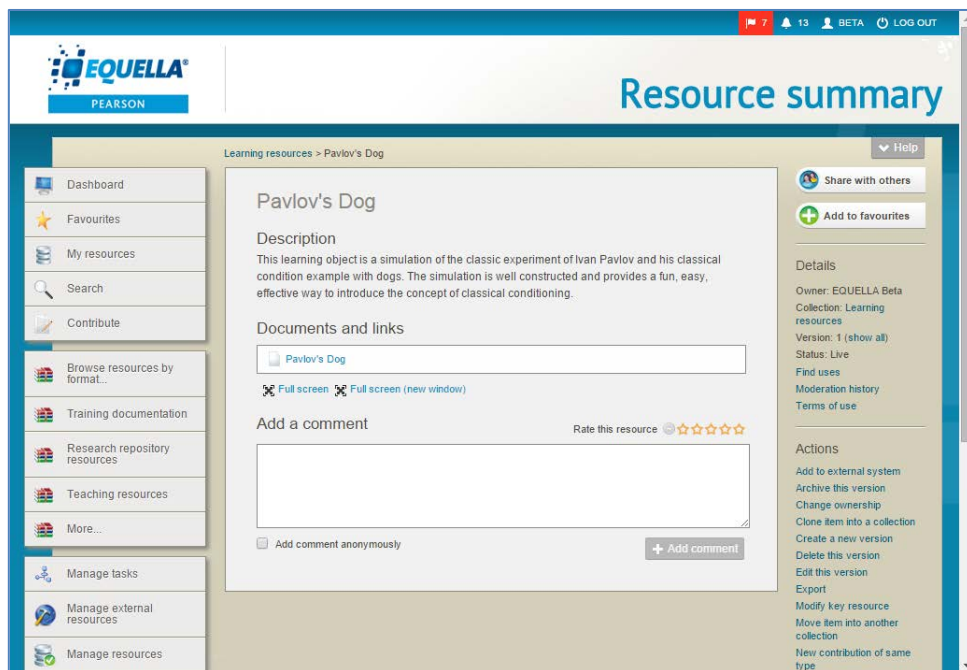
Figure 6 Successfully imported resource

Configure a remote repository search

Remote repository searches are created and modified using the **Remote Repositories** tool available from the Administration Console.

To access the Remote Repositories tool

1. Log in to EQUELLA as an administrator, select **Settings** then **Administration console**, as shown in Figure 7.
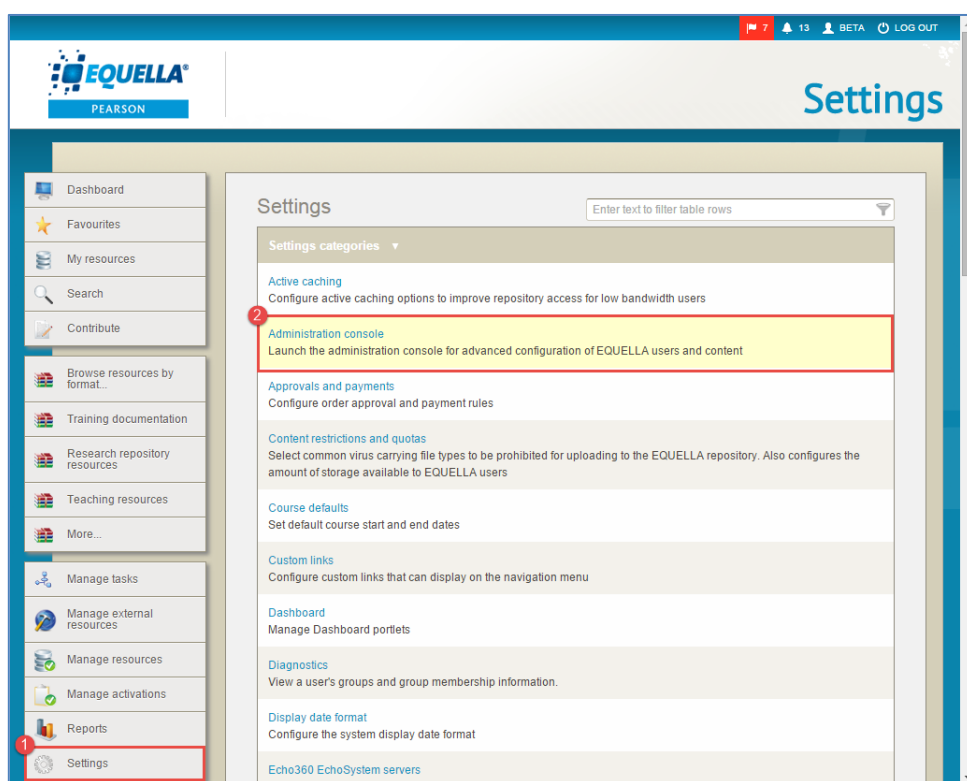
Figure 7 Accessing the Administration console

2. The Administration console displays. Select **Remote Repositories.** A list of all previously configured remote repository searches displays, as shown in Figure 8.
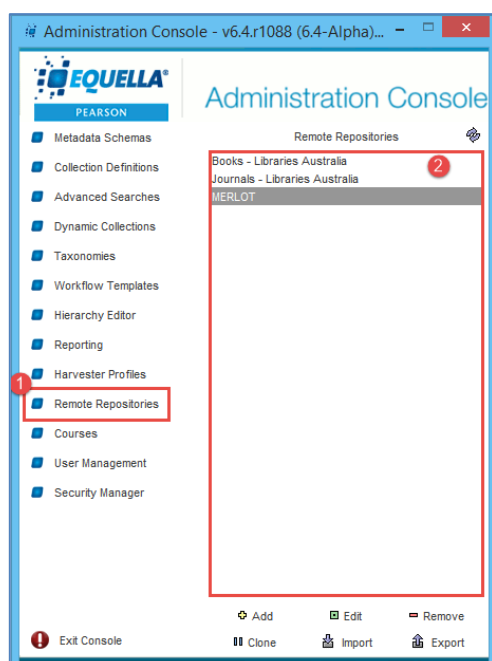

Figure 8 Administration Console—Remote Repositories

Administration Console elements

When a tool has been selected the **Add**, **Edit**, **Remove**, **Clone**, **Import** and **Export** buttons are enabled. (Providing the correct privileges have been granted, refer to the *EQUELLA Administration Security Guide* for further information.)

Add

Click ✛ Add to display the **Repository Types** dialog where a repository type can be selected for the new search. Select a repository type then [OK] to display the **Remote Repository Editor**.

Edit

Select a search then click ⬜ Edit (or double-click on a search) to display the **Remote Repository Search Editor** for modifying the selected search.

If the selected search is being edited by another user a **Locked** dialog is displayed as shown in Figure 9, providing the following options:

- **Open as read-only**—disables the **Save** button so that no changes can be committed.
- **Forcefully unlock**—unlocks the entity from the previous editor. Editing is possible but changes by other users may be lost.
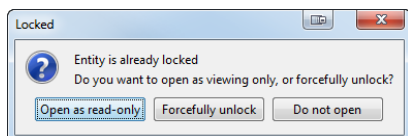- **Do not open**—the search configuration screen will not be opened.

Figure 9 Locked entity dialog

Remove

Click ▬ Remove to delete the selected search.

Clone

Click ‖ Clone to copy an existing search. The cloned search can then be modified by selecting the **Edit** button.

Import

Click ⬓ Import to import a remote repository search that has previously been exported from the Administration Console. A warning dialog will be displayed, as shown in Figure 10. (*NOTE: Only ZIP files that have been exported from the Administration Console should be imported—other ZIP files may adversely affect the stability of the system.*)
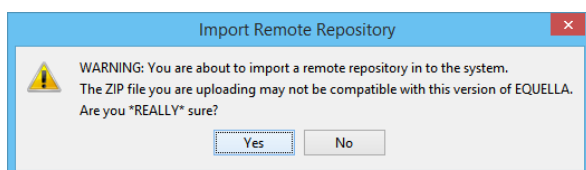

Figure 10 Import Remote Repository Search warning dialog

Export

Click 📤 Export to export a remote repository search as a ZIP file.

Search types

Each remote repository search type can be configured to display results that can be contributed to a collection using the user process described above. Available search types include:

- EQUELLA
- MERLOT
- SRU
- SRW
- Z3950

Add a search

To select a search

1. Click ✛ Add on the Administration Console to display a **Repository Types** dialog listing the available search types; an example is shown in Figure 11.

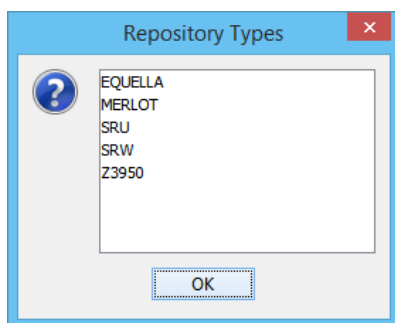
Figure 11 Repository Types dialog

2. Select a repository type from the list.
3. Click [OK] to display the **Remote Repository Editor—Details** tab. An example of a Z3950 repository search type is shown in Figure 12.

Figure 12 Remote Repository Editor—Details page

The **Remote Repository Editor—Details** page comprises configurable elements specific to the selected search type and elements that are common to all search types (highlighted in red in the example above).

The common **Details** page elements are:

- **Name —** enter the display name of the repository.
- **Description** – enter the search description for display on the **Remote repositories** page.
- **Timeout —** select the response time (in seconds) before a search is terminated. The default time is 30 seconds.
- **Owner —** Click the Search button to change the owner of the search; by default this is the search's creator.
- **Contribute to this collection** – select the collection to receive the imported results.
- **Use this import transform** – select an XSLT that transforms the metadata of the imported result from the **Import record format** to the collection XML. The list contains XSL transformations that are added to the metadata schema for the associated collection.
- **Display XSLT** – upload an XSLT for transforming metadata XML into the display format.

- **Disable this remote repository**—check this box to disable the repository link displayed on the **Contribute** page. Uncheck the box to enable the repository.

The search specific elements are described in the sections detailing the individual search types, as follows:

EQUELLA

The **EQUELLA** search allows for the searching of other EQUELLA repositories (version 5.0 and above). Figure 13 shows an example **Details** page for this search type.

Figure 13 Remote Repository Search Editor—EQUELLA—Details page

The configurable elements for the **EQUELLA—Details** page are:

- **Institution URL –** enter the address of the EQUELLA institution to search.
- **Shared secret ID –** enter the shared secret ID for authentication of search requests.
- **Shared secret value –** enter the shared secret value for authentication of search requests.
- **Sign-in option –** select to sign-in as the current user, or specify another user based on your institution configuration.

MERLOT

MERLOT (Multimedia Educational Resource for Learning and Online Teaching) is an open online community of resources designed so higher education members can share learning materials.

Performing a MERLOT search requires access to MERLOT Web Services, which requires a licence key (for information visit http://www.merlot.org/merlot/signWebServicesForm.htm).

Configure a valid MERLOT search by entering your licence key into the **Licence Key** field; an example is shown in Figure 14.

Figure 14 Remote Repository Editor—MERLOT—Details page

Select **Allow advanced searching (requires licence key to have appropriate privileges)** only if the MERLOT licence provided includes advanced searching privileges, otherwise the MERLOT search will return an error. An example is shown in Figure 15.

Figure 15 Example error message if advanced searching selected without appropriate licence

SRU

SRU (Search/Retrieval via URL) is a standard XML-focused search protocol for Internet search queries, utilising CQL (Contextual Query Language), a standard syntax for representing queries. Figure 16 shows an example **Details** tab for this search type.

Figure 16 Remote Repository Search Editor—SRU—Details page

The configurable elements for the **SRU—Details** page are:

- **URL –** connects to the required search engine.
- **Schema Name –** for the type of metadata schema to be searched.

SRW

SRW (Search/Retrieve Web service) is a protocol designed to support interaction over a network such as the Internet. This type of web service promotes interoperability between distributed databases. Figure 17 shows an example **Details** tab for this search type.

Figure 17 Remote Repository Search Editor—SRW—Details page

The configurable elements for the **SRW—Details** page are:

- **URL –** enter the URL to connect to the required search engine.
- **Schema Name –** enter the name of the metadata schema to be searched.

Z39.50

Z39.50 is a client/server protocol for locating information from remote computer databases (a university library title database, for example). Figure 18 shows an example **Details** tab for this search type.

Figure 18 Remote Repository Search Editor—Z39.50—Details page

The configurable elements for the **Z39.50—Details** page are:

- **Host** – enter the address of the search gateway. This can be either a host name or an IP address.
- **Port** – set the access port. The default port is 210.
- **Database –** enter the name of the database to be searched.
- **Username** – enter the username for remote repository authentication.
- **Password** – enter the password for remote repository authentication.
- **Import record format –** select from the drop-down list of record formats.
- **Load default attributes –** click [Select] to choose the default advanced search field values to use on the Z39.50 search page. Once selected, the search field values display in the **Advanced search fields** table at the bottom of the page. The options available are:

- **EQUELLA Default** – loads the default EQUELLA values (this is the default value).
- **Bath level 0** – loads the Bath level 0 values.
- **Bath level 1** – loads the Bath level 1 values.

To learn more about the Bath Profile, go to http://www.ukoln.ac.uk/interop-focus/activities/z3950/int_profile/bath/draft/stable1.html.

- **Standard query attributes** – the values for *Any field* for the selected default search field values display by default but can be edited. For information regarding Z39.50 attributes, see http://www.loc.gov/z3950/agency/defns/bib1.html.
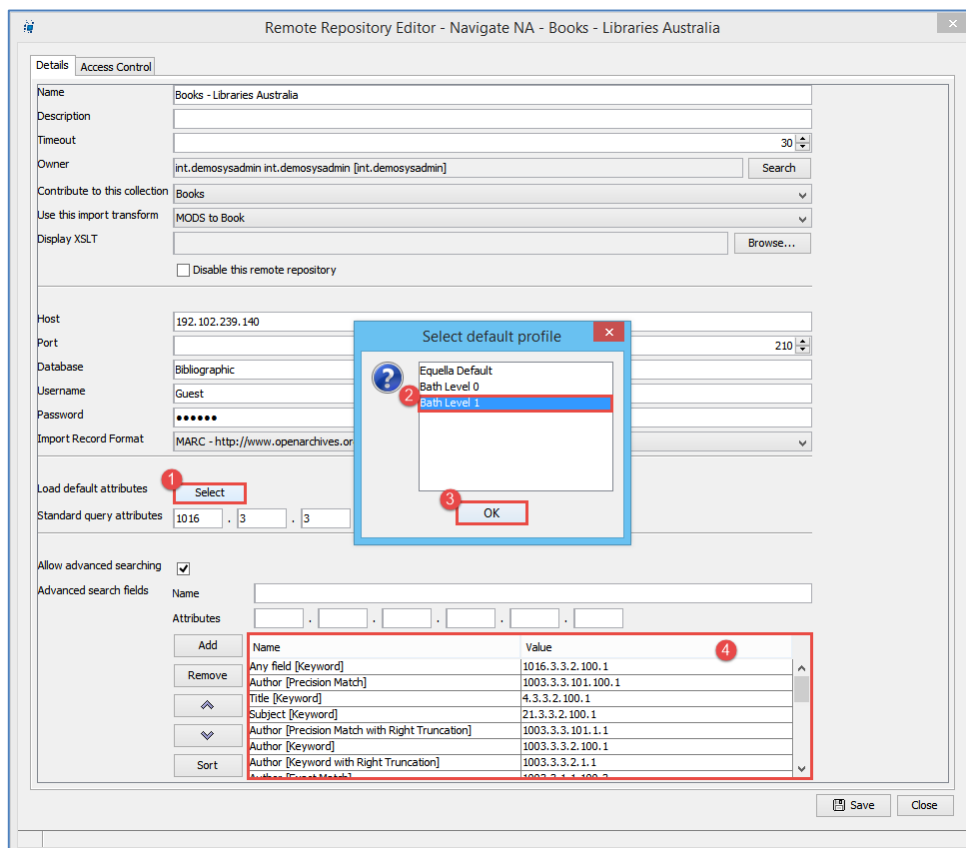
An example is shown in Figure 19.

Figure 19 Load default attributes - Bath Level 1

- **Allow Advanced Searching –** check this box to provide the user with a selection of specific search fields in a library search query rather than one general field. (*NOTE: The Z39.50 host must support advanced searching for this option to be utilised.*). The advanced search fields available display in the **Advanced search fields** table at the bottom of the page.
- **Advanced search fields** – this table lists the search fields that belong to the selected default attributes selected in the **Load default attributes** field. Additional search fields can be added. See Adding additional search fields below.

Adding additional search fields

Additional search fields and their attributes can be added to the table then used when searching the repository from the Search page (when **Allow advanced searching** is enabled).

A user can add a custom field by typing in the field **Name** and associated **Attributes,** then clicking [Add]. For information regarding Z39.50 attributes, see http://www.loc.gov/z3950/agency/defns/bib1.html.

An example is shown in Figure 20

Figure 20 Add an Advanced search field

The new search field is then added to the table, and appears as an advanced search field on the Z39.50 search accessed from the Search page. An example is shown in Figure 21.

Figure 21 Z39.50 Remote Repository search - with Title key search field

Restricting contribution to imported Remote repository results

Where a collection definition is linked to a remote repository, by default the contribution wizard will be accessible from the **Contribute** page in the form of a link. This allows

contribution to this collection in the normal manner. To ensure that contribution to the collection can only occur by importing a result from a remote repository search, this link can be disabled.

To disable the contribution link

On the **Details** tab of the Collection Definition editor, select the checkbox **Do not allow direct contribution (Remote repository collection only).** An example is shown in Figure 22.
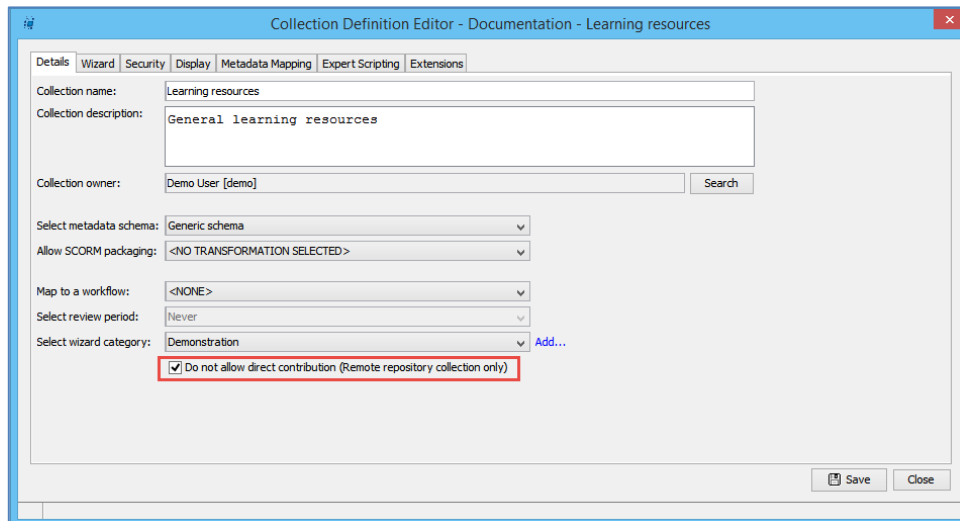

Figure 22 Disable direct contribution

This configures the contribution wizard to be accessible only through a remote repository search. When this option is selected, the collection link on the **Contribute** page as shown in Figure 23 is disabled.
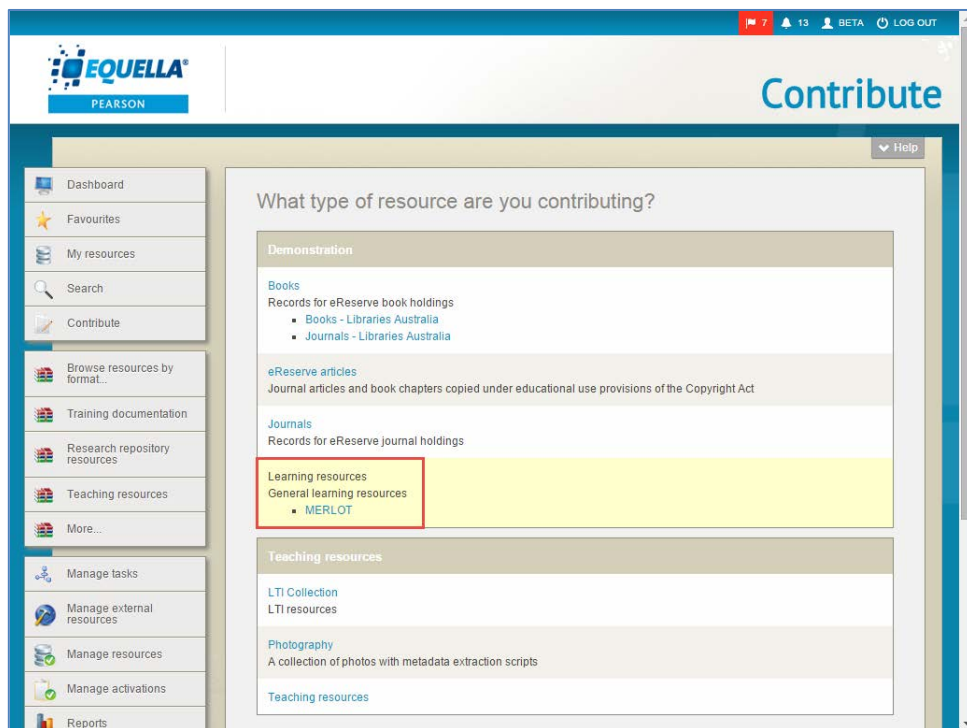
Figure 23 Contribute page with disabled Learning resources collection

Security

Along with the **Details** tab, each search type features an **Access Control** tab. This allows the administrator to configure user access to the selected search. There are four privileges that are associated with the remote repositories:

- CREATE_FEDERATED_SEARCH
- DELETE_FEDERATED_SEARCH
- EDIT_FEDERATED_SEARCH
- SEARCH_FEDERATED_SEARCH.

These privileges can be configured for all remote repository searches using the security manager, or all but CREATE_FEDERATED_SEARCH can be configured for each search using the **Access Control** tab.

The following is an example of how to configure the DELETE_FEDERATED_SEARCH privilege using the **Access Control** tab. This example grants the 'System Administrator' role the delete privilege.

To configure this privilege

1. Select the **Access Control** tab to display the **Access Control** page.
2. Click the **Who can?** drop-down arrow and select the **delete this remote repository** option.
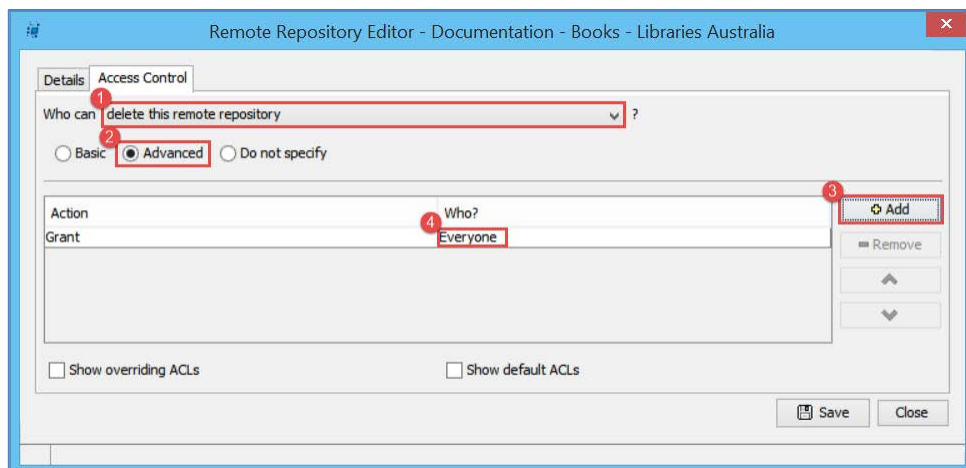3. Select the **Advanced** option to display the access control list.

Figure 24 The Access Control page

4. Click ⊕ Add .

5. In the **Action** field, notice it is already set to **Grant**.

6. In the **Who?** field, click **Everyone** to display the **Select Recipients...** dialog. An example is shown in Figure 25.

7. Select the **Roles** option.

8. Click Search to display a list of available roles to choose from. Alternatively, type the first letter or letters of search item and click Search .

9. Select **System Administrator** then select the > button to move the role to the right-hand pane, as shown in Figure 25.
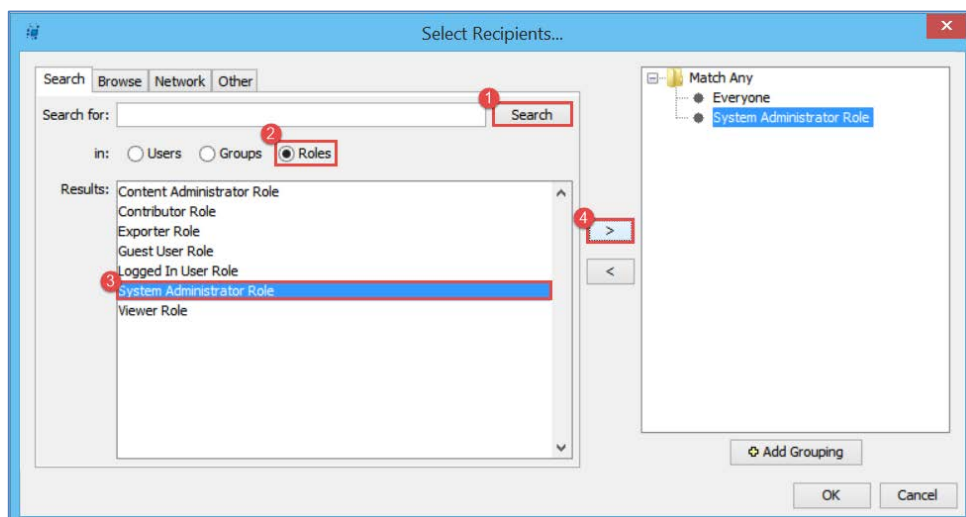

Figure 25 Select Recipients... dialog

10. Remove **Everyone** from the right-hand pane by highlighting it, then click < .

11. Click OK to close the dialog. The delete privilege has now been granted to the system administrator, as shown in Figure 26.
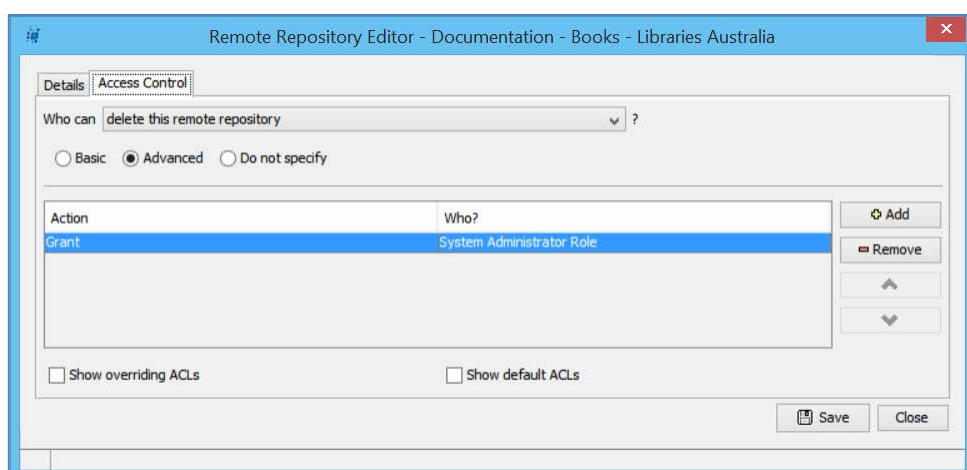
12. Click 💾 Save .

Figure 26 Completed access control configuration

Further privileges and users can be configured using the above procedure. Alternatively, refer to the *EQUELLA Security Administration Guide* for more information on security configuration.

Contact Client Support

We are always happy to help.

If your organisation has a support agreement with EQUELLA then help is available at http://equella.custhelp.com.