

Specification for external document references

ExD--1: Scope / Purpose

The external document reference feature allows the operator to define one or more sub-records that link an external file to certain types of context records. The feature also allows the operator to open and read the linked file in a new window. The file being referenced by the sub-record must reside at a resolvable URI or within a locally mounted/mapped file management system. The file must be accessible to the application.

The purpose of the external document reference feature is to allow users to link to documents that provide additional administrative information about the accession or resource (such as a deed of gift, a word processed finding aid, or accession inventory). A referenced document may be of any content type (e.g., image, text, audio, etc.) or file format (e.g., jpeg, tiff, html, doc, xls, xml, wav, etc.).

Opening a referenced document will be governed by the conventions or configurations (such as MIME associations) defined by the host operating system.

ExD--2: Record / template description

The external document sub-record will include three fields, all of which are required for a valid external document sub-record to be saved and linked to a context record:

- Title
- Location (i.e., a URI or file path statement)
- Public Enabled (default value = False)

It will also include System Control Data (generated by application and not editable by operator)

- Record Created Timestamp
- Last Modified Timestamp
- Record Created Staff Name
- Last Modified Staff Name

It will also include several command options:

- Save record
- Cancel record

- Open document
- Navigate across all external document records linked to the same context record:
 - First
 - Previous
 - Next
 - Last

ExD--3: Displaying external document references

All external document references are to be displayed in a pane or displayed on a tab embedded within the context record to which they are linked, (e.g., an accession, resource, digital object, or rights record).

The pane will be divided into two columns. The left column will be labeled “Title” while the right column will be labeled “Identifier”.

The contents of the pane will be sortable by either column. The contents of the pane as a whole should be scrollable for cases where the number of rows in the list exceeds the number of rows supported by the pane.

The external document pane will also include two control buttons: “Add” and “Remove”

ExD--4: Creating / deleting external document references

External document references are made from within a context record. Permissible context records are the accession, resource, digital object, and rights records. Document references, as defined here, are not to be supported at the resource component or digital object component levels.

A user may declare 0 or more external document references per context record. However, a user should be prohibited from making duplicative external document references within the same context record. In other words, the application should check to ensure that each sub-record attached to a context record has a unique identifier (URI or file path).

To reference an external document, the user selects “Add Document” option in the context record. This will open the external document sub-record. The user must then record the following statements in order to save the record and link it to the context record:

Title

Location

Public Enabled (checkbox)

Successfully adding an external document reference sub-record will result in the title and location of the document being listed in the document pane.

To delete an external document reference, the user must highlight the external document reference in the document pane in the context record and then select the control for removing a reference. The user will be requested to confirm the intention to delete one or more external document references. If confirmation is given, the selected external document references will be removed from the list of external document references in the document pane, thereby signaling that the corresponding external document sub-records have been deleted.

ExD--5: Business rules

1. An external document reference may be added, edited, or removed by all staff users who have permissions to edit the context record to which the reference sub record is being attached.
2. A valid external document reference record must contain statements for
 - a. Title
 - b. Location
 - c. Public Enabled
3. An external document reference record must be linked to a permissible context record (e.g., accession, resource, digital object, or rights record).
4. Each external document reference record must be linked to only one context record. In other words, a one to many relationship is not allowed.
5. Zero, 1, or more external document reference records may be linked to the same context record.
6. Duplicate external document reference records may not be linked to the same context record. Duplication is evaluated solely on the basis of the Location value.
7. Records with the Public Enabled field checked (= True) will be accessible to the public web access component of the application.

- Records with the Public Enabled filed unchecked (= False, and default setting) will not be accessible to the public web access component of the application.

ExD--6: Required task sequence

- Within an appropriate context record, select the option to reference an external document.
- Record the title statement for the external document
- Record the location for the external document
- Record the Public Enabled value for the external document (default = False)
- Save the external document reference record

ExD--7: Optional task sequence

There are no optional tasks supported.

ExD--8: User intentions / Application response sequence

User intention (Required fields in <i>italics</i>)	Application response / action
<i>Within an open context record, select the option to add a reference to an external document</i>	
	Application opens the external document reference sub-record
<i>Record the title statement for the referenced document</i>	
<i>Record the location for the referenced document</i>	
<i>Indicate if referenced document is to be publicly available (default is = False)</i>	
<i>Save the external document reference sub-record</i>	
	If the external document reference is not

	valid, the application will indicate the record is lacking a value for the title and / or the identifier fields
	If the external document reference record is a duplicate, the application will indicate the record is already attached to the current context record
	If the external document reference record is valid and not a duplicate, the application will indicate the record has been saved, and the external document reference will be listed in the document pane for that context record

User intention (Required fields in <i>italics</i>)	Application response / action
<i>Within an open context record, select an external document reference in the document pane to edit</i>	
	Application displays the selected external document reference record
<i>Edit either of the three fields comprising the external document reference record</i>	
<i>Save the edited external document reference record</i>	
	If the external document reference is no longer valid, the application will indicate the record is lacking a value for the title and / or the identifier fields
	If the external document reference record has become a duplicate, the application will indicate the record is already attached to the current context record

	If the external document reference record is valid and is not a duplicate, the application will indicate the record has been saved, and the revised external document reference will be listed in the document pane in the context record
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User intention (Required fields in <i>italics</i>)	Application response / action
<i>Within an open context record, select one or more external document references in the document pane to delete</i>	
<i>Select the option to delete the selected external document references</i>	
	Application responds: "Are you sure you want to delete "N" date record(s). Yes or No
<i>Select the No option</i>	
	Application reverts to the state before selecting delete option
<i>Select the Yes option</i>	
	Application indicates N records have been deleted
	before clearing message
	Application refreshes list of external document references in document pane of open context record

User intention (Required fields in <i>italics</i>)	Application response / action

<i>After adding one or more external document references, choose the option to save the open context record</i>	
	Application will indicate the open context record is updated.

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ExD--9: Date data elements

Element	Definition	Type	Default Values	Required
exDocTitle	Title or description describing the document	Text > 256		Yes
exDocLocation	URI or file path statement	Text < 256		Yes
exDocPublicEnabled	Checkbox defining whether the resource is available for public web access	Y/N	FALSE	Yes
accessionRecordCreatedTimestamp		timestamp	Automatically generated when record is created	Yes
accessionLastModifiedTimestamp		timestamp	Automatically updated when record is saved.	Yes
accessionRecordCreatedStaff		Text < 256	Automatically insert lookup of staff name from user tables	Yes
AccessionLastModifiedStaff		Text < 256	Automatically insert lookup of staff name from user tables	Yes

ExD--10: Imports

None supported.

ExD--11: Exports

None supported.

ExD--12: Reports

None supported.

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