

Specification for Repository Record

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Rp1: Scope / Purpose

Repository records provide identification and contact information for repositories having custody of the resources described within the application. These records distinguish one repository's records and data rules from those of another repository using the same database for a multi-repository application implementation (e.g., restricting administrative user permissions to resource, accession, and digital object records linked to a specific repository record).

Rp2: Record / template description

At least one repository record must be created for any given installation of the application before any parent resource, resource component or accession record can be entered into the database. An administrative user may be associated with one or more repositories, via a control in the Staff User/Permissions Record.

The repository record will contain the following required fields

- Repository name
- Repository short name
- Theme (non-config lookup from installed public themes—see Public Interface Specification)
- Template Set (non-config lookup from installed template sets—see Public Interface Specification)

In addition, users may enter information for the following optional fields:

- Organization/Agency code
- Country code
- Parent Institution name
- Address 1
- Address 2
- Address 3

- City
- State/Region
- Country (non config lookup)
- Mail code
- Telephone
- Telephone Extension
- Fax
- Email Address
- Email signature
- Repository URL
- Branding device URL / location

The application will include controls for:

- Saving a repository record
- Editing an existing repository record
- Adding a new repository record
- Deleting one or more repository records
- Browsing a summary list of context records that are directly attached to a repository record (e.g, resources, digital objects, etc). The mechanism to browse the attached context records shall provide separate tabs/panes for each associated record type, and provide a hyperlink to the editing screen for the relevant modules so that users can unrelate the record, if desired.

The programming approach chosen by the technical team and designers for this functionality should be in keeping with the overall interface design philosophy.

Rp3: Displaying repository information

Specific repository-level information (e.g., storage locations, output templates for public web access, staff permissions, etc.) that is associated to a distinct repository-level record will be displayed according to the system rules assigned to a single application installation for a given repository and all of its related resource records. The system

rules governing the input/output of information and access permissions for a specific repository is controlled through the application's administrative manager.

Rp4: Creating / deleting repository records

Repository records will be created using a Repository Management Module, a sub-module of the System Configuration/Management Module. Only users that have administrative permission for the Repository Manager will be allowed to edit, create and delete repository records.

Rp5: Business rules

1. Every application implementation must have at least one repository record, and additional repository records may be added. It will not be possible to delete the last repository record in an implementation.
2. A repository record may be created, edited, or deleted only by a user who has been provided permission in the Staff User/Permissions Module
3. A valid repository record requires the fields marked as required in section Rp2, and may include the fields listed as optional.
4. Every other record in the system (e.g., resource, subjects, location, names, digital objects and locations), **MUST** be linked directly or indirectly to one and only one repository record, **EXCEPT** the user record, which can be linked to one or more repository records.¹ (See the specifications for each of the other record types for a more complete description of the linking process and business rules.)

¹ The link from a repository record to a specific staff user record indicates that the particular staff user will have authority to edit/add or delete context records associated with that repository, subject to the permission level that the user is provided in the permissions/user module. When a staff user logs in under an account that has permissions to more than one repository, then the user must be asked to log in under a particular repository role, which will then remain active for that particular editing session, and the user will be provided add/edit/deletion powers only for those records attached to that repository, subject to their overall restrictions.

Adding/Editing records:

1. User selects the option to add a new repository record or to edit an existing record. Application loads with default values, if adding new records or with pre-existing values, if editing an existing record.
2. User **MUST** record values for all of the required fields and **MAY** record values for all of the optional fields.
3. User may associate staff user records to the repository record.
4. User saves the repository record. If required values are not present, application prompts user to supply the missing values.

Deleting records:

The mechanism for deleting repository records must be implemented with great care. In particular, the deletion of a repository record **MUST NOT result in the deletion of any objects (e.g. Accession, Resources, or Digital Object records) that are attached to the repository).**

1. User selects option to delete repository record.
2. If no records of any type are attached to the repository record, application asks user to confirm the deletion, then deletes the repository record.
3. If other records of any type other than staff users are attached to repository record, **AND** more than one repository record is defined: a) application responds "Repository record cannot be deleted. Please delete or reassign attached context records using the related records pane and/or the editing pages for the records in the appropriate module. b) Application cancels the deletion process.²

² Staff users can only reassign context records between repositories for which they have been associated to through the repository module and have been granted the appropriate permissions to reassign context records across those repositories through the permissions/user module.

Rp8: Exports

The repository record itself will not be exportable. However, certain elements of the repository record should be placed into the EAD, EAC, MARC, and METS output. Data maps will be defined during development of the application.

Rp9: Reports

None.