

Metasearch Project

Documentation Plan

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This plan describes proposed documentation to accompany the CDL's metasearch infrastructure, which surfaces search results derived from harvested metadata along with search results from traditional academic abstracting and indexing databases.

Project Goals

The Metasearch documentation project addresses two user groups:

- Developers, to whom it explains how to implement and configure the Metasearch architecture
- Team leaders, to whom it explains the actual use of the Metasearch portal

Document Format

Documents will be written in FrameMaker, and delivered as PDF files using the established format for technical documentation at CDL.

Resources

The documentation project will use the services of a full-time technical writer for three to four weeks of research, writing, and review.

The project will require some advisory and review time commitment from members of the Metasearch team, including Heather Christenson and Roy Tennant.

Existing documents include documents related to the Metasearch project and existing documentation for Metalib.

Scope

The documentation will support the portal's deployment and use at UC research libraries. It will provide all information needed to deploy and use the portal.

- The document aimed at metasearch developers will include instructions on how to install, configure, brand, and launch the portal.
- The document aimed at metasearch users (team leaders) will describe how to use the portal to search, to specify sources searched, and to use the results.

Schedule

Each of the two documents will take from one and a half to two weeks of research, writing, and review.

Descriptions of Documents

The documentation will comprise two main documents, each aimed at a distinct audience.

- a developers' guide, to be called *Guide for Metasearch Developers*
- a user guide for librarians, to be called *Guide for Metasearch Team Leaders*

Both documents are described and briefly outlined below.

Guide for Metasearch Developers

This document's audience consists of developers who will install and brand and customize the portal for individual research institutions.

Architecture Overview

Section describing the three application levels: (1) the user interface, (2) the MAX API, and (3) the Metalib X-server. Also described: SOAP communications among the three levels.

How to Set Up Query Processing

Using MAX, XTF, and MetaLib to Set Up Metasearch at a Research Institution

Proxy Server

IDE Installation and Setup

MetaLib Resources

Using the Brand File

JSPs and Struts

- index.jsp: implementing optional components (e.g., journal browse, RSS feed)
- summary.jsp: includes, available variables
- results.jsp: includes, available variables
- display.jsp: includes, available variables

Guide for Metasearch Team Leaders

This document will explain the use of the metasearch portal. Its audience is librarians who deploy the portal.

Metasearch Overview

Metasearch Documentation Plan

Section describing what the metasearch portal can do, with explanations of its architecture and its purpose.

Tasks

- Specifying Sources
- Query Status
- Results (interpreting results)

Full-text and OpenURL links

Available Components

- Links
- Using RSS Feeds
- Browsing Journals
- Standards