

	A	B	C
1	1 = required; 2 = optional; 3 = not required		
2	<b>functional requirements</b>		
3	<b>Discovery tools available to end-users:</b>		
4	searching	1	
5	browsing	1	
6	syndication for end users (e.g. RSS)	1	
7	notification for end users (e.g. e-mail)	1	
8	navigation and search available within complex objects	1	
9	simple query interface available	1	
10	simple browsing interface available	1	
11	query by title	1	
12	query by creator	1	
13	query all collection items	1	
14	query all items in data store (for administrator)	1	
15	query all items in data store (for end-user)	2	
16	inventory complex object's contents as individual subsets	1	
17	advanced query available	1	
18	query by keyword	1	
19	query by any descriptive metadata fields	1	
20	query by administrative or technical metadata fields	1	
21	complex filtering allowed on queries	1	
22	fulltext searching	1	
23	find related items (e.g. the Amazon ability)	2	
24	find recommended items based on user history	2	
25	search results sorted by date original material created	1	
26	search results sorted by date object entered into system	1	
27	search results sorted by last modified date	1	
28	search results sorted by title	1	
29	search results sorted by author	1	
30	search results sorted by relevancy	1	
31	user-available documentation on search methods and available metadata	1	
32	ability to configure system to display only minimal metadata	1	
33	ability to display complete descriptive metadata	1	
34	ability to display complete administrative and technical metadata	1	
35	ability to export metadata in standard formats for later reuse	1	
36	sufficient metadata to make it possible to cite an item in scholarly form	1	
37	standard citation formats available for export or cut and paste	1	
38			
39	<b>End-User Interface:</b>		


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40	personal collections	1	
41	user-packaged , persistent, shareable multipart objects	1	
42	annotation system for objects	1	
43	wish lists	3	
44	ability for administrators to hide or turn off all end-user features for specific groups of users	1	
45	ability for administrators to hide or turn off all end-user features on a case-by-case basis	1	
46	ability to deliver content to an externally-provided display software	1	
47	personalization of interface by administrator	1	
48	personalization of interface by end-user	2	
49	users can download object bit streams into local applications and systems, within limitable rights	1	
50	all descriptive metadata available to users for viewing	1	
51	all descriptive metadata of viewable to users for download	1	
52	administrators have ability to make any subset of metadata (descriptive, administrative, or technical) available to users for view and download	1	
53	content viewable via the Web (installation of client software not necessary for end-user viewing)	1	
54	ability to annotate content from an external source	3	
55	management of multiple collections with different discovery methods	1	
56			
57	<b>content types:</b>		
58	multipart objects	1	
59	provide persistent identifiers for each item in the repository	1	
60	provide persistent identifiers which will outlive the particular product being used as a backend	1	
61	support for audio, and video, textual, and image	1	
62	bitstreams as assets		
63	ability to access specific components of any multipart object and design component-specific metadata	1	
64			
65	<b>Cataloging:</b>		
66	metadata creation for a single item via a form	1	
67	metadata creation via batch upload	1	
68		1	
69			
70	supports standard metadata schemas		
71	extensible to use other schemas as necessary	1	

	A	B	C
72	cataloging user interface customizable to user group needs	1	
73	workflow: initial input of digital asset	1	
74	workflow: initial input of metadata	1	
75	workflow: modification of asset	1	
76	workflow: modification of metadata	1	
77	workflow: deletion of asset		
78	workflow: deletion of metadata	1	
79	workflow: Association of asset with collections	1	
80	workflow: permissions associated with asset	1	
81	save draft copies of work in progress	1	
82	workflow flexible and able to be used or disabled and tuned to the university's needs	1	
83	management of multiple collections with different workflows	1	
84	configurable cataloging roles within collections	1	
85	configurable notification of changes to administrators	1	
86	catalog URLs which are remote to the system	1	
87	workflow: metadata review support	1	
88	configurable default metadata fields	1	
89	cataloger can add metadata fields to input form from an approved list while cataloging	1	
90	system-wide default values for metadata entry	1	
91	user-wide default values for better data entry	1	
92	collection-wide default values for metadata entry	1	
93	on-the-fly user-configurable default values for metadata entry	1	
94	verify metadata against a controlled vocabulary	1	
95	ability to select certain metadata fields from a short controlled vocabulary	1	
96	ability to select certain metadata fields from a long controlled vocabulary	1	
97	ability to use shared metadata for a single object	3	
98	ability to copy metadata to a new object	1	
99	catalog or can create metadata templates for similar objects	1	
100	metadata templates are configurable as shareable between catalogers	1	
101	ability to mark certain metadata fields in all records as invisible to end-users	1	
102	certain metadata fields marked as required	1	
103	certain metadata fields marked as optional	1	
104	revision control for multiple users modifying same metadata or object	1	
105	ability for cataloger to edit metadata on assets selected from a set of search results (global change on any metadata field)	1	
106	macro automation (e.g. export, save, localize) customizable	1	

	A	B	C
107	spellcheck versus authority record and automatic correction	1	
108	validators for legal MARC/DC	1	
109	maintenance of both local and remote authority files	1	
110	ability to merge local authority files to remote	1	
111			
112	<b>ingest:</b>		
113	ingest user interface customizable to user group needs	1	
114	metadata import tools	1	
115	object import tools	1	
116	ingest compressed files and unzip during ingest	1	
117	store compressed files and unzip during display	2	
118	ingest from URL	3	
119	ability to automatically extract technical metadata during a batch ingest	1	
120			
121	<b>Interoperability:</b>		
122	metadata export tools for administrators extract all metadata	1	
123	metadata export in standard formats	1	
124	object export tools for administrators	1	
125	object export in original/imported formats	1	
126	display of stored asset with a data type conversion	3	
127	on-the-fly	1	
128	metadata export in batch for administrators	1	
129	integration with course management tools either directly or via export mechanisms	1	
130			
131	<b>Backup and sustainability:</b>		
132	data verifiability tools	1	
133			
134	database wide backup	1	
135	record-segmented backup	1	
136	version control for metadata	1	
137	version control for objects	1	
138	load testing reports available	1	
139	benchmarks available	1	
140		1	
141		1	
142	stability reports available	1	
143			
144	<b>Standards compliance:</b>		
145	supports preservation standards	1	
146	Supports intercommunication; federation; and harvesting standards	1	
147			
148			
149	supports internationalization for storage, input and	1	
150	output		

	A	B	C
151	<b>Rights Management:</b>		
152	ability to limit display of an item based on rights policies and user attributes	1	
153	uses an industry standard Digital Rights Expression Language which is freely available to encode DRM	1	
154	Defaults repository functionality and content as open to non-authenticated users or close to authenticated users only on a configurable basis as reflects the general policy of the university.	1	
155	ability to share user authentication systems with other Brandeis systems	1	
156			
157	authenticate only at point of need	1	
158	ability to restrict access by username	1	
159	ability to restrict access by IP	1	
160	ability to restrict access by group	1	
161	ability to restrict access by groups defined in PeopleSoft	1	
162			
163	<b>Reporting:</b>		
164	usage reporting	1	
165	catalog reporting	1	
166	browser reports for Web client access	1	
167	browser reports for referrer access	1	
168	configurable reports	1	
169			
170			
171			
172	<b>System requirements:</b>		
173			
174			
175			
176			
177		1	
178	Cataloging client is browser and platform agnostic	1	
179	ingest available through multiple platforms	1	
180	discovery client; ingest client; and Cataloging client must all be section 508 compliant or otherwise accessible	1	
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	A	B	C
190	automated object retention based on administrative metadata	1	
191	segmented backup and restore or export and import for easy restoration of individual assets	1	
192			
193	<b>vendor, documentation, training</b>		
194	Sufficiently open information about system to document all of our requirements and discovery questions	1	
195	Training in the system available	1	
196	Documentation available	1	
197	either support or an active and helpful user community available, though support need not be from the vendor.	1	
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200			
201	commitment from either vendor or open source development community to smooth the upgrades with backwards compatibility	1	
202	commitment to a patch and upgrade schedule	1	
203			
204	<b>Due diligence -- we must discover:</b>		
205	application server requirements		
206	database requirements		
207	architectural model		
208	cost and model for available support		
209	staffing requirements		
210	cost/licensing model/open source		
211	Company profile, including history, staffing, financial status		
212	number of installations		
213	minimum hardware requirements		
214	database		
215	filesystem support		
216	web server		
217	programming language used for APIs and scripting		
218	reference checks		
219	on-site or offsite hosting		
220			
221	<b>Features we need to implement ourselves which are not part of a product:</b>		
222	document functions of the repository and various collections	1	
223	document copyright and fair use policies	1	
224	document security policies	1	
225	document privacy policies	1	
226	document workflow policies	1	
227	document workflow	1	

	A	B	C
228	document metadata conventions and limited vocabularies used	1	
229	document which collections are available for remote harvest	1	
230	inform relevant gateways and registries of the collections which are available for remote harvest	1	
231	educate end-users	1	
232	published retention schedule for all managed assets	1	
233	published service-level agreement for each collection	1	
234	abstraction layer which hides to set up every mechanisms from end-users	1	
235	abstraction layer which hides input mechanisms from catalogers and ingesters	1	
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