Creating pre-defined (Custom) Queries & Results (CQRs)

Before You Begin

To access your CONTENTdm® training Collections from the Host, you will need your CONTENTdm URL.

What you will learn

You will see how the **Custom Queries & Results (CQR)** easily facilitates customization.

The Exercise

To start the wizard, open the Host URL and add *cdm4/cqr/cqr1.php* to the end:

https://collections.carli.illinois.edu:8443/cdm4/cqr/cqr1.php

This launches the **Custom Queries and Results** wizard.

NOTE ABOUT THE CQR BUILDER: The CQR wizard was written under earlier versions of CONTENTdm software, but there are still some types of CQRs that can be created and used in version 6.

1)   You may present your end-users with four different types of pre-built queries: simple hyperlinked statements, pull-down lists of queries, index searches (by field), or text (keyword) boxes.

   The options of "generate the default view parameters for the browse or results page" is now obsolete in CONTENTdm Version 6. DO NOT USE THIS OPTION.

NOTE: Collection(s) need to be PUBLISHED before you can create CQRs for them. If you need to have your collection temporarily published to create a CQR, please contact the CARLI Office to have CARLI Staff do that for you.

2) Select the **drop-down list box**, and click **Next**.
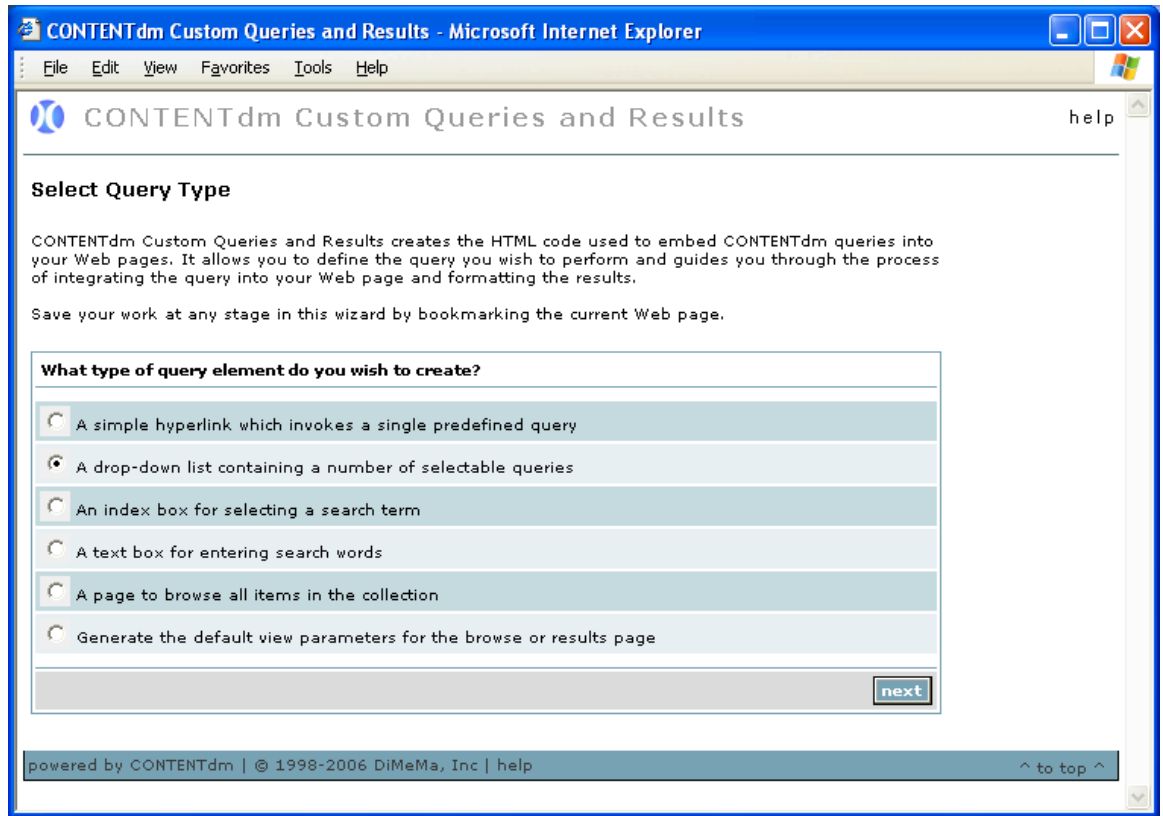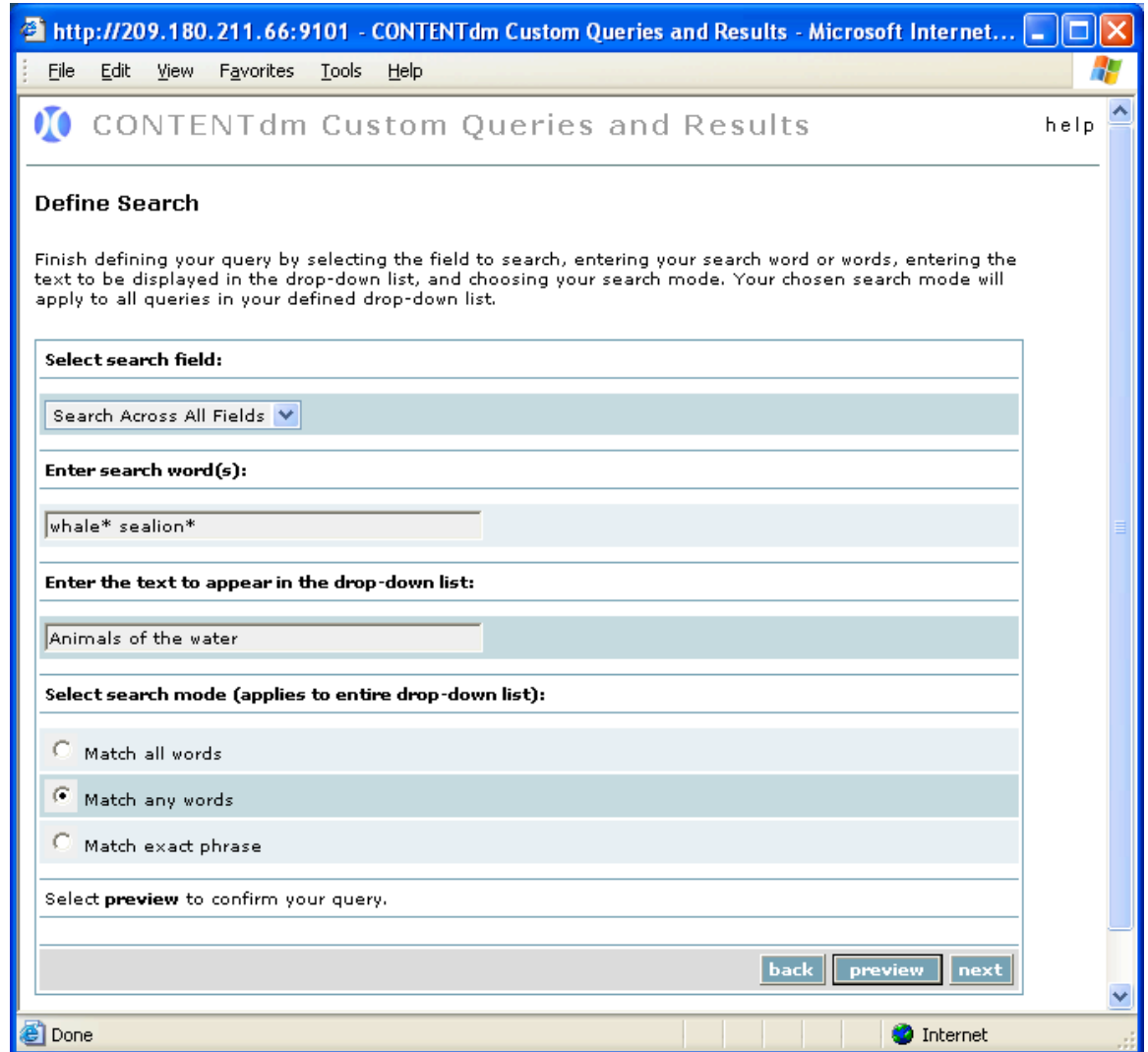
◆ **Figure 1: Select the drop-down list box.**

3) You may choose to query a single CONTENTdm collection on the Server, multiple collections, or all collections on the Server. Choose your test collection. Click **Next.**
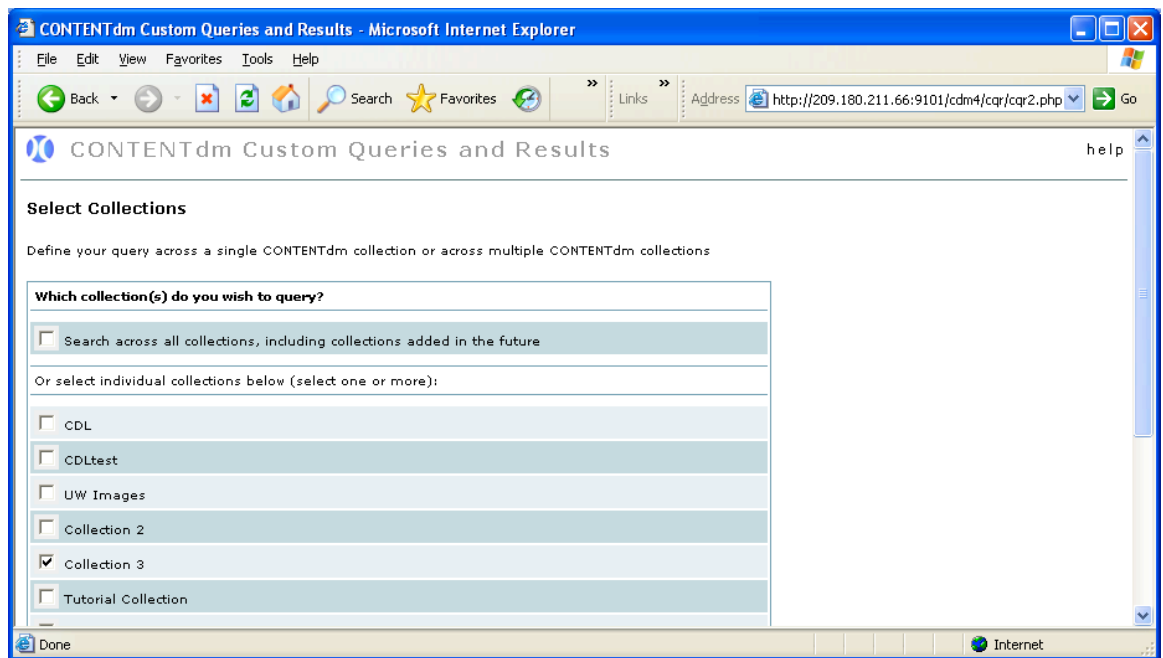
◆ **Figure 2: Select Collection**

4) Define the pertinent query information including the search field, the search word or words. Since **your test collection** is rather scant, **Search Across All Fields**, use the terms: *whale* seal** and allow **Match any words** to retrieve a result.
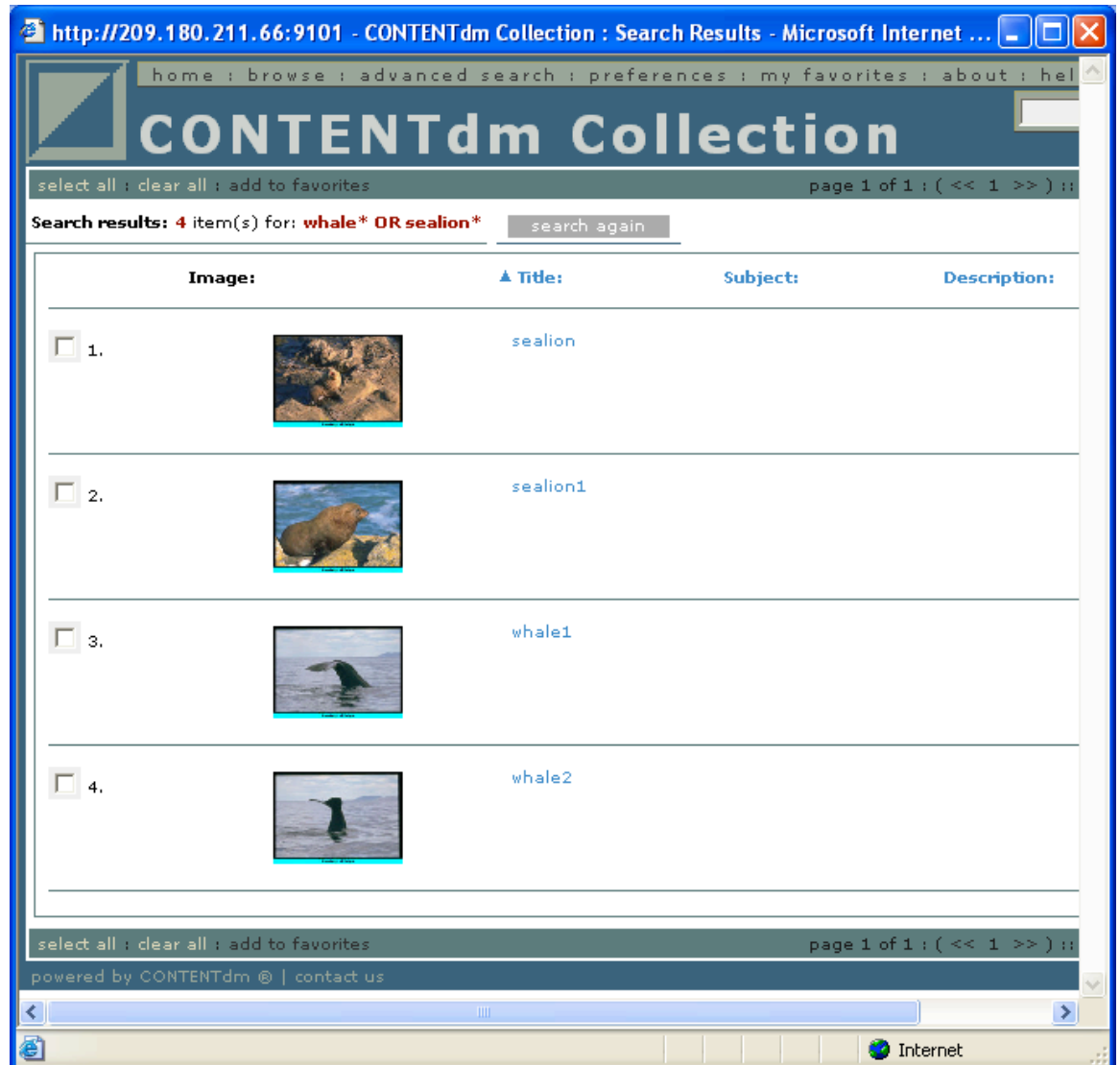
With your user population in mind, give your query a name appropriate for this search.

◆   **Figure 3: Define the search terms for the query.**

5) After defining your query, click the **Preview** button to preview the search results in a new browser.

◆   **Figure 4: The results generated by the defined query.**

6) When you are satisfied with the search result, close the new browser window (X in upper right.)

Click **Next**.
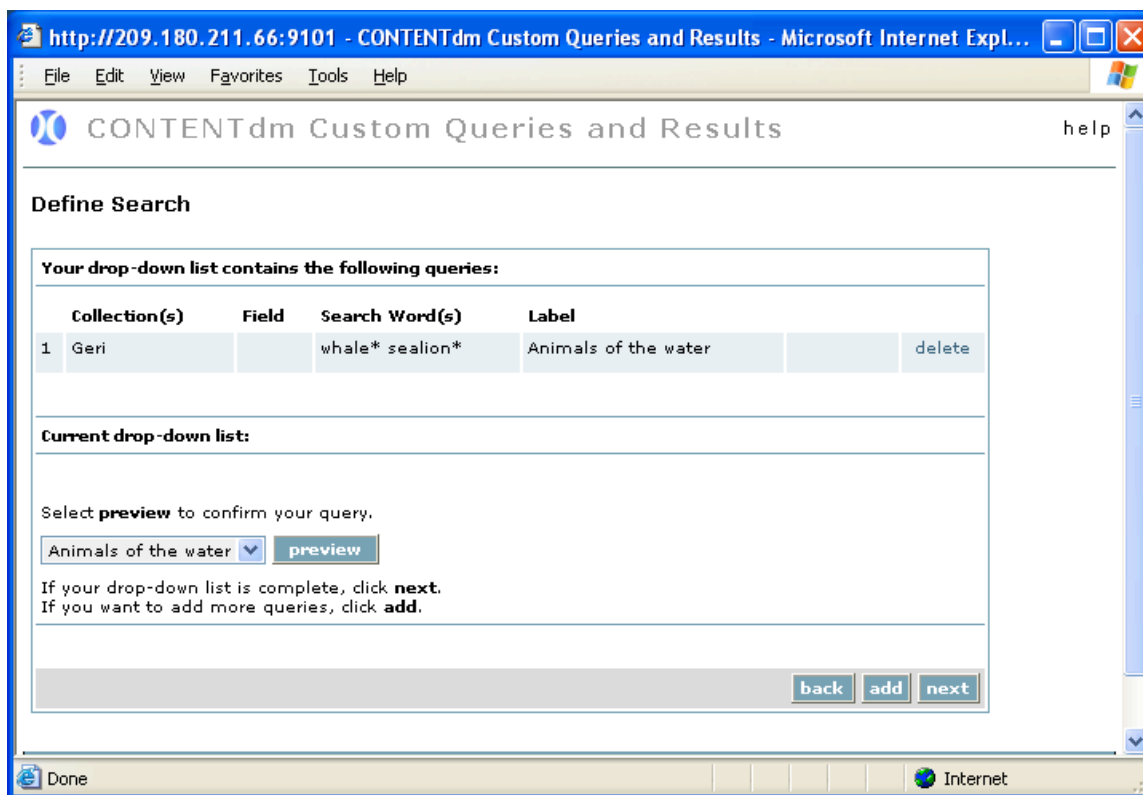
◆   **Figure 5: Add another query.**

7) Add another query so that your pull-down list has a choice of predefined queries.

NOTE: This time, let's prepare to use the new ***compound object page filter*** option. Create a query that will retrieve multiple pages of your compound document. I.e., search on terms that are found in the metadata of the *components* of your letter from Alexander Graham Bell. Previewing this query should return multiple hits.
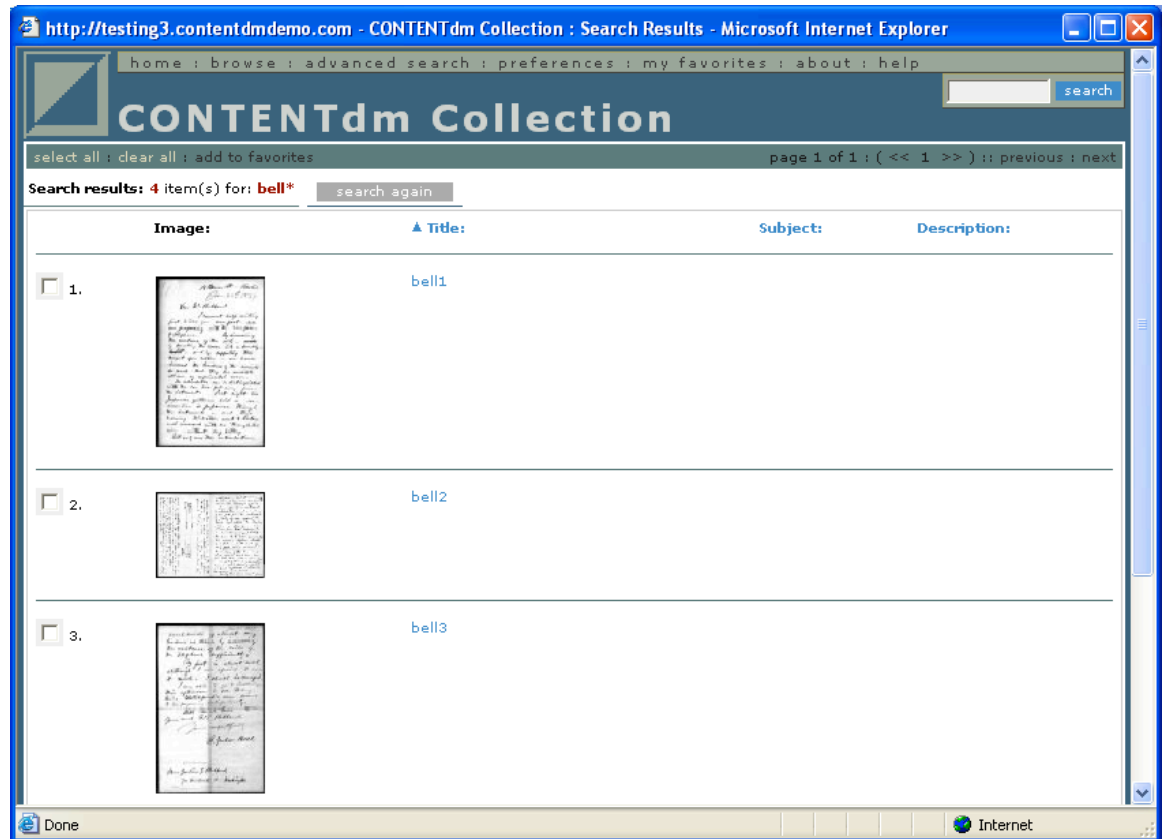
- ◆ **Figure 6: Notice that all three individual pages display**

8) Close the preview window (X in upper right).

NOTE: you have the option at this point of Editing the list box, adding still more queries, or continuing to complete this pulldown list of predefined queries.

9) When finished adding queries, click **Next**.

NOTE: You may specify customized web templates for displaying search results. These HTML pages have code to control the layout of the page and placement of the results within the page. By using custom web templates, the results pages and the individual item display pages can be designed to match the look of your site. If you use your own custom templates, they must be on your Server and you must specify their filenames, relative to the Web home directory, in the two text boxes.

Results and Item display templates: For purposes of this training, we will use the defaults for our *Results Template*, and *Item Display Template*.

But even choosing these default templates, you still have some choices to make about the way your results will display.

10) Change the default view to *Thumbnails*, with *12* **results per page.**

11) Click **"Only show compound object within search results."**

◆   **Figure 7: Accepting templates but setting *new* defaults for display.**

12) Click **Next** to generate the HTML code for your "home page". Your query has automatically been rendered in HTML. The block of code can now be copied and pasted into your Web page using your favorite editor.

NOTE: If you create a CQR for a collection that is being hosted on the CARLI Server, you will simply email the HTML to support@carli.illinois.edu and CARLI Office staff will insert it onto the collection's home page.
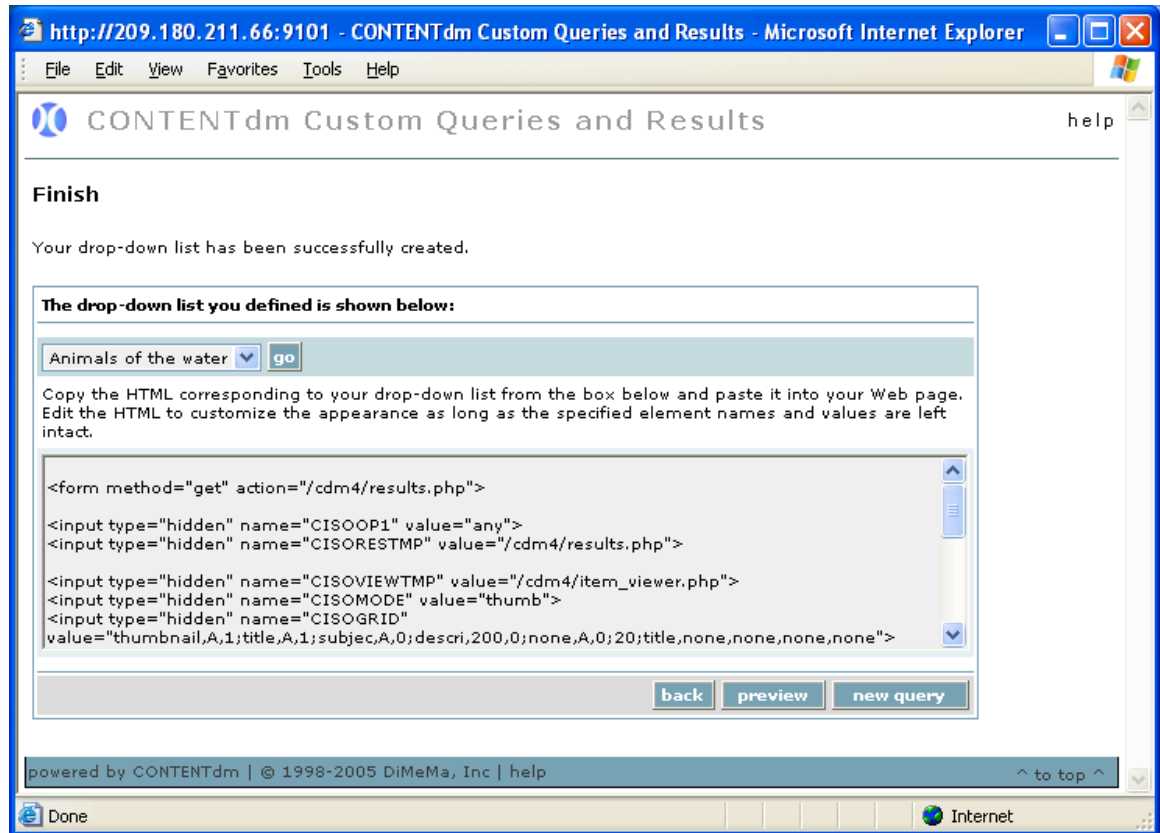
♦   **Figure 8: The HTML block ready for pasting into your Collection's home page.**

13) Select the contents of the html block in its entirety. **Copy**.

14) On the Desktop, locate the file **indexCDM.html** and *right* click on it. Choose **Edit**. Or

   Open with (WordPad or **notepad**).

15) **Paste** the form block in between the two comments referring to the **CQR Code.**

   i.e. between

   <!-- Insert CQR Code *Below* Here -->

   and

   <!-- Insert CQR Code *Above* Here -->

```
indexCDM.html - Notepad
File  Edit  Format  View  Help
<meta http-equiv="Content-Type" content="text/html; charset=iso-8859-1">


<LINK REL="stylesheet" TYPE="text/css" HREF="/client-style.css">

</head>
<body bgcolor="#FFFFFF" marginheight="0" marginwidth="0" topmargin="0" leftmargin="0">
<table width="800" border="0" cellpadding="0" cellspacing="0">
        <tr>
                <td rowspan="2">
                        <img src="images/logo_client.gif" width="204" height="65"></td>
                <td>
                        <img src="images/banner_image.gif" width="596" height="31"></td>
        </tr>
        <tr>

                <td><img src="images/blank.gif" width="596" height="34"></td>
        </tr>
</table>

<table border="0" cellpadding="15">
<tr><td>

<h1>Browse my Digital Collections</h1>

<! -- remember to copy and paste the root URL with port, in one place:  for the form method="GET"
action="http://209.180.211.66:9101/cdm4/results.php. -->

<!-- Insert CQR Code Below Here -->



<!-- Insert CQR Code Above Here -->

</td></tr>
</table>

<hr>
```
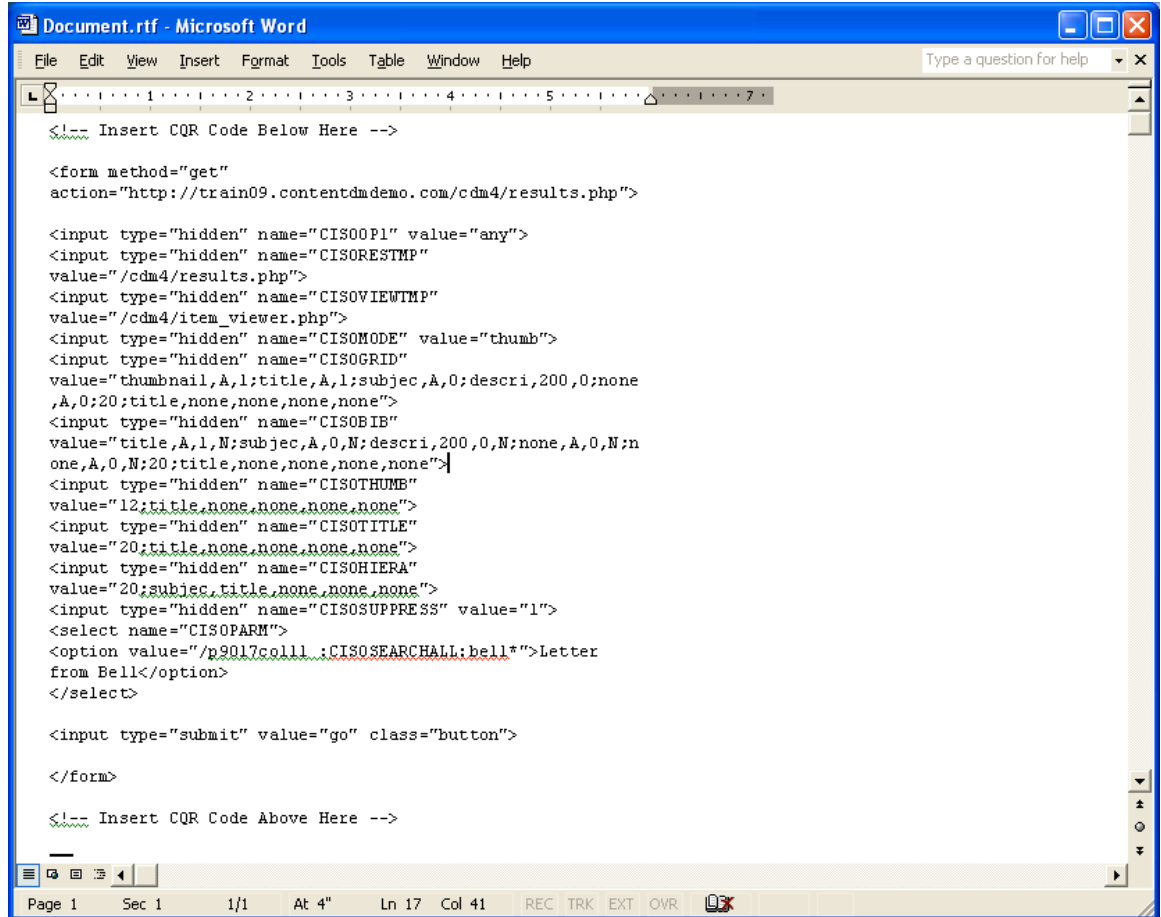
   ◆ **Fig 9: The block of code is copied into the indicated space in the *indexCDM.html*
       file with Notepad.**

NOTE: Inside the new form block, you must also insert the appropriate root URL for any
so that your query runs against the collection at the training server. For this type of query,
the URL must be inserted after ..action=" in the first line of the code block.

Note also the **CISOSUPPRESS** variable. This controls the compound page filter option.

```
Document.rtf - Microsoft Word

File  Edit  View  Insert  Format  Tools  Table  Window  Help          Type a question for help

<!-- Insert CQR Code Below Here -->

<form method="get"
action="http://train09.contentdmdemo.com/cdm4/results.php">

<input type="hidden" name="CISOOP1" value="any">
<input type="hidden" name="CISORESTMP"
value="/cdm4/results.php">
<input type="hidden" name="CISOVIEWTMP"
value="/cdm4/item_viewer.php">
<input type="hidden" name="CISOMODE" value="thumb">
<input type="hidden" name="CISOGRID"
value="thumbnail,A,1;title,A,1;subjec,A,0;descri,200,0;none
,A,0;20;title,none,none,none">
<input type="hidden" name="CISOBIB"
value="title,A,1,N;subjec,A,0,N;descri,200,0,N;none,A,0,N;n
one,A,0,N;20;title,none,none,none">
<input type="hidden" name="CISOTHUMB"
value="12;title,none,none,none,none">
<input type="hidden" name="CISOTITLE"
value="20;title,none,none,none,none">
<input type="hidden" name="CISOHIERA"
value="20;subjec,title,none,none,none">
<input type="hidden" name="CISOSUPPRESS" value="1">
<select name="CISOPARM">
<option value="/p9017coll1_;CISOSEARCHALL;bell*">Letter
from Bell</option>
</select>

<input type="submit" value="go" class="button">

</form>

<!-- Insert CQR Code Above Here -->
```

Page 1   Sec 1   1/1   At 4"   Ln 17   Col 41   REC TRK EXT OVR

◆   **Fig 10: Remember to set the correct root URL for your collection server**

16) Save the notepad file called **indexCDM.html.**

17) From the Desktop, *left* click on the file **indexCDM.html**. It should invoke your browser using this file as a home page.
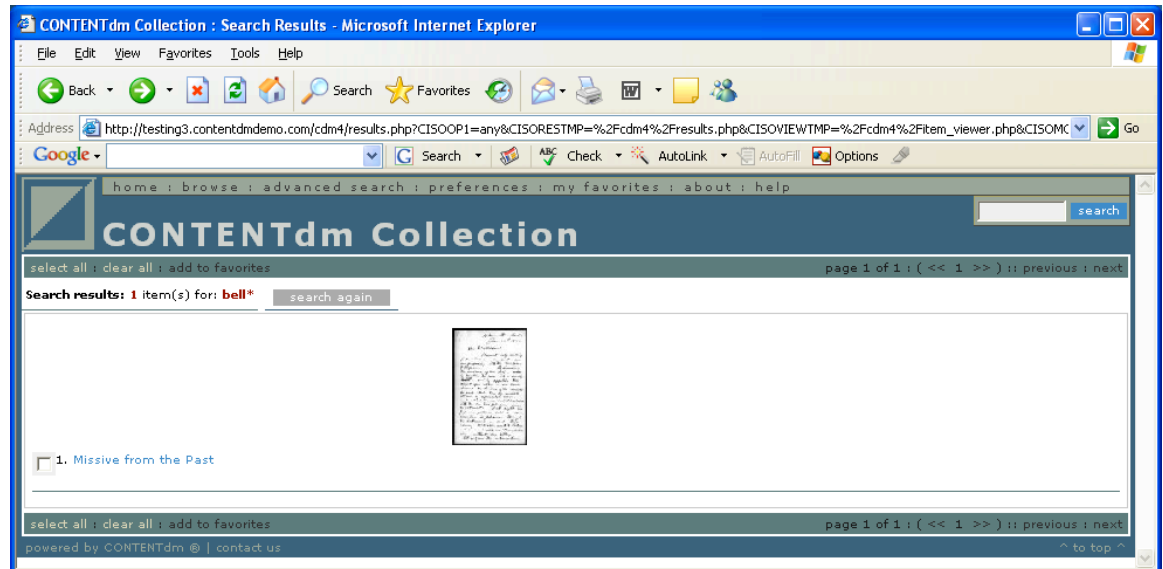
18) See your queries in the pulldown box you have created. Choose each in turn, and click **Go** to simulate your end-users' experience with your home page.
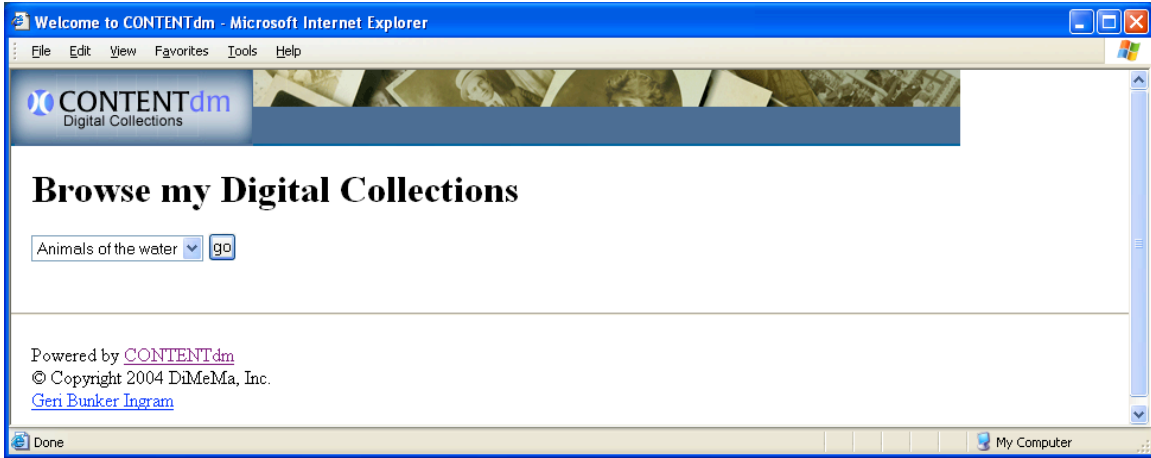
◆   **Fig 11: Your home page for training with your custom queries in pulldown box.**
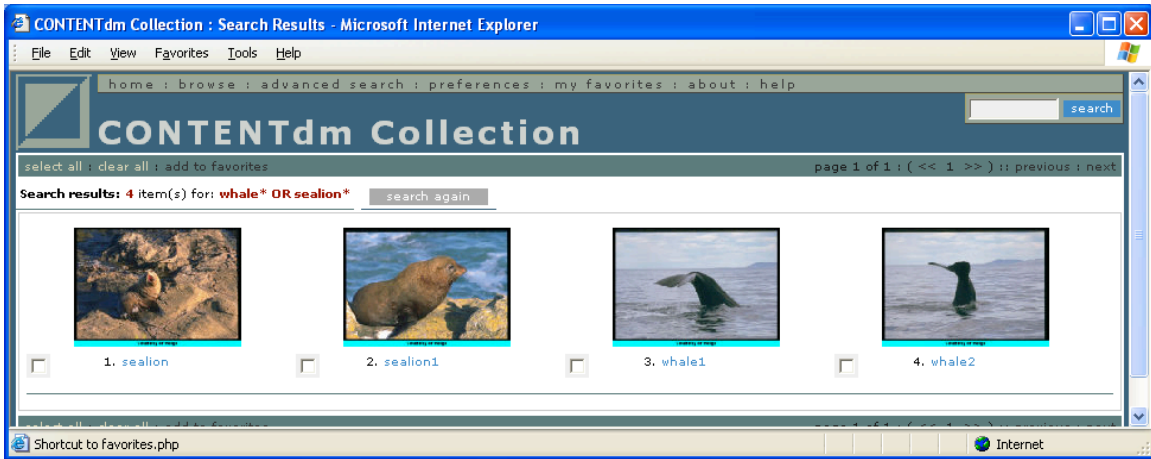
◆   **Fig 12: New result display is the Thumbnail—changed for *this* query in CQR.**

◆ **Fig 13: Notice that only the document itself is displayed—not the individual pages.**

NB: Remember that you can set compound page suppression on by default not only for predefined queries, but also at the server and at the collection level through the use of the CISOSUPPRESS variable.

19) At this point, you are free to return to the Custom Queries & Results Wizard and create another **New Query**, go **Back** to revise the first set of queries, or close the browser in which the **Custom Queries & Results** is working.