Getting the best from a Soutron Search Portal

We want you to have the best possible Search Portal in place to help you reach your end users and present content in the best possible way. For some clients this might be a public facing site but for others the audience is within the organisation. There may be a need for multiple Search Portals to present selected content to different audiences. We are constantly striving to deliver greater flexibility and control so that your content is presented in exactly the way that you need.

Eight Design Themes

Soutron have created eight Search Portal themes, one of these can be selected and implemented as part of the initial system set up, with branding, logos and text specific to your needs.

If you are an existing client and setting up a Search Portal for the first time, this is also freely provided.

You have control!

We have made it simple for you to make changes to the design and layout and the content presented in a Search Portal using templates, so you don't have to use Soutron staff to apply any changes to your system.

Design themes can be set up at any time using the customisable templates built into the application and these can be easily modified. If you do want Soutron staff to do this for you, we can do this at our usual rates.

For those who have knowledge of HTML 5 and CSS (Custom Style Sheets) every aspect on the Search Portal design can be controlled, added to and amended. If you do not have these skills available to you then perhaps your web master or someone in your organisation that does have these skills can assist you or you can call on Soutron for the service needed.

Learn more: www.soutron.com/search-portal

Updates coming soon…

In a forthcoming release (4.1.3) it will be possible to customise the layout of the Search Results record display (brief display) so that a different style of presentation can be given for brief details rather than the grid style of display at present. This too will be fully driven by templates within the application System Management functions that you can edit independently of Soutron.

Only when you engage our services to set up, amend or change a design of the templates do you incur any charge (£75 per hour plus VAT).

No upgrade is needed to do this except where newer features are required (such as the new RSS Feed functionality in version 4.1.2).

All upgrades to the system are provided and implemented at no additional cost for those using Soutron's hosting service and are included in the annual fee for support and maintenance.

If you need any help or advice at any time please call the Soutron Help Desk for assistance: www.soutron.com/helpdesk

FAQ

1. **Can I change the text on the Search Portal?**

   Yes. Using the Administration Tools in System Administration, menu driven options are available to select the template(s) that drive the Search Portal. The menu prompts you to select the template to change and this can be edited either WYSIWYG or using the HTML 5 built in editor. Anyone who has knowledge of HTML 5 can easily amend and change the template and the text in the template.

2. **Can I add clickable images to books, documents and records to the Search Portal?**

   Yes. Images work well to direct users to content that you wish to draw attention to. We recommend images are no larger than 72dpi and sized to fit the template and area you wish to use them.

   Images will need uploading to our server (ask the Soutron Help Desk) or the URL from a 3rd party host will need to be added to the HTML. As with editing text content some knowledge of HTML is required for best results.

3. **Can I apply clickable images to execute a search on parts of my catalogue, collection or saved search to present Search Results?**

   Yes, as described in 2 above. Clickable images directing your users to parts of your collection, or particular content is a great way to help users jump straight into an area of the catalogue or archive. If you have a popular search you wish to promote, this can be saved and then made selectable by the use of an image on the search portal.

4. Do I need to have knowledge of CSS to apply changes?

This depends on the extent of the changes that you need to make to the design. CSS can be used to implement design changes but requires detailed knowledge of CSS. It is also necessary to have changes to the CSS applied by transferring the CSS file to the server (the application is installed only on servers and access to the server is limited to Soutron staff if it is hosted by Soutron).

Our advice is to have any changes made to the CSS by someone within your organisation who is a web master or expert with CSS or use Soutron staff.

5. What is a template?

A template is a predefined set of instructions to control the layout of the Search Portal web page and is similar to a document except that it controls the way that information from the database is presented to the web page. As a result, it has to follow certain rules. The decision was taken to use HTML 5 as the means to instruct the layout of the page, since HTML 5 is a proven and widely adopted code to do this task and is therefore open to anyone.

Using templates, it means that there is great flexibility and control for each client using Soutron's system, without having to revert back to Soutron to make a change or to have Soutron create custom bespoke programs.

6. How many Search Portal design themes can I use on my system at any one time?

There is no limit. It is for you to decide what your business needs.

7. What if I like one theme but also some parts of another theme, can I mix them up?

Yes. You can mix themes, simply by copying HTML 5 code between templates. Note that knowledge of how HTML 5 and CSS controls page layout is really important so that you get the correct layout and effect.

8. Can we have a completely customised / bespoke theme?

Yes, some clients are keen to do this and may have a particular idea as to how the content should be presented or there is a need to keep the library or archive within the same design rules that the web site is using. This then needs someone with CSS and HTML 5 skills to apply to ensure that the designs are accurately applied. If you have a design you would like us to work to, perhaps to match your existing website or you have seen some other sites you like the look of and would like to have something similar then yes we can create your own bespoke theme.

This is a chargeable service and we can provide a quotation for this.
Contact Soutron Help Desk if this is of interest.

9. **What if it all goes wrong and the template doesn't display as I want it to?**

   We strongly advise before making any change to a template you take a copy of it using the 'Source' button in the Template Editor, select all the HTML 5 code, copy and paste it into a text file. Keep this text file copy safe until you are happy that any changes have been correctly applied. If a problem arises, you can then simply re-paste the code back into the template and Save and continue as before.

   Please note that Soutron does not keep backups of previous templates. Reproducing any template design is chargeable when we are asked to do so.

10. **Do upgrades affect my Search Portal template designs?**

    No. One of the strengths of the Soutron application design philosophy is that the application can be upgraded and retain all previous settings and configurations that have been applied. So, when an upgrade is applied there is no extra effort to re-set all of the configuration settings that you might have in place.

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