Introduction

The Portico Dashboard is a tool for Portico staff, Portico publishers, and Portico libraries to monitor the preservation process and status of content being preserved at Portico. Each entity, Portico staff, publishers, and libraries, have their own “view” of the Dashboard. Librarians may see the overall status of all participating publishers, but will only be able to review individual items within the preservation services in which their library participates (e.g., if your library only supports e-journal preservation, you may not review individual books). Publishers may review any content they provided for preservation.

The Dashboard can be used to look up all sorts of information about content preserved in Portico, for example:

- the last time content was received and run for a publisher
- a list of articles matching a DOI
- hot linked DOIs within articles for easy access to the content at the publisher’s website
- easy access to the article XML and PMD (preservation metadata) files

This guide has the following sections:

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Accessing the Dashboard

The Dashboard is accessed at: http://audit.portico.org

The log-in form will be on the right side of the page or, on a narrow monitor, at the bottom of the page. On the left side of the page are high level numbers that show the completeness of the entirety of the Portico Archive (these numbers reflect Portico’s status in regard to all committed content).

Portico analyzes its preserved holdings in order to predict how many issues should be preserved for each journal. These numbers can shift significantly as content is constantly preserved—which will change both the number of issues preserved and the prediction of how many issues should be preserved.
Journal List Page

Upon logging in, librarians will be taken to a list of all journal committed to Portico. Journals with content preserved in Portico will be hot links. Journal without any content preserved yet, will have a “Not ingested” icon to the left.
Find a Specific Title

One of the most useful features of the journal list page is the ability to look up a journal or book title by any of the words in the title, by any of the ISSN, or by any of the ISBN. This tool is located in the left hand navigation bar on the page. For example, below are the results from a search on the word “pulmonology” within Journal Titles.

The results include a list of only those journal titles within Portico that contain the phrase “pulmon”.

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![Dashboard Screenshot]

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*Portico Dashboard Manual for Librarians*
List of Publishers Page

Many times, you may want to review content for a specific publisher or evaluate the current state of a publisher. The most useful set of pages for these actions are the publisher pages. Selecting the “Publishers” tab at the very top menu, will take you to a list of publishers committed to preserve content with Portico.
Publishers Page—Status

The status is calculated by evaluating the number of journals preserved, the number of issues preserved, the number of books preserved, the number of collections preserved, and the percentage of content that is difficult to process.

Publishers Page—Journals, Books, and D-Collections

The percentages here are:
- the percentage of predicted issues which are preserved
- the percentage of unique books preserved compared to the number of books committed to Portico
- the percentage of collections committed to Portico that are preserved.
Individual Publisher Page

The publisher pages have much information on them and can be gotten to by clicking on any hot linked publisher name from anywhere in the Dashboard or audit interface. At the very top of any publisher page, there are a series of links or “tabs” that will allow you to view different information about the status of the publisher’s content.

- **Overview**: The tab you land on when you select any particular publisher.
- **Journals**: A list of the committed journals for this publisher with start and ending volume information for the content in the Portico archive.
- **Books**: A list of the preserved books for this publisher.
- **File Status Report**: A listing of all the file formats in this publisher’s content and their status.

**Individual Publisher Page—Overview**

The overview tab on the publisher page has multiple sections. The very top section includes the same set of numbers that were seen on the list of publishers’ page.

In the Journals column, the percentage is the number of journal issues preserved by Portico divided by the number of issues Portico expects to receive, based on an analysis of the content Portico has preserved (see section below on
E-Journal Completeness Report for a deeper explanation of this analysis). In the Books column, the percentage is the number of unique books preserved by Portico divided by the number of books committed to Portico by this publisher. For a publisher participating in the D-Collections preservation service, the percentage would be the number of collections preserved divided by the number of collections committed to Portico.

The next chart shows the total amount of content preserved in the Portico archive for that publisher (this includes any journals, books or d-collection items preserved for the publisher) at different moments in time. Below we can see that American Chemical Society content was first preserved in 2007 and that Portico is now preserving more than double the number of articles preserved in 2007.

The next slot on the tab is a statistical overview of the publisher. These are counts of the number of journals, volumes, issues, articles, and books have been preserved for this publisher.

The final section of the tab is an overview of the last time content for this publisher was received by Portico, loaded into the content processing system, and preserved.
Individual Publisher Page—Journals

The Journals tab lists all of the titles committed to Portico by this publisher and includes identifying and holdings information for each. Note that the “start” and “end” information in this chart is simply a reflection of the content preserved in Portico—the publication may begin earlier than the Portico start information and run longer than the Portico end information.
Individual Publisher Page—Books

The Books tab lists all of the books preserved for this publisher (note that as of mid-2016, this is just the list of books preserved and does not include books that have been committed by the publisher, but not yet preserved).
Individual Publisher Page—File Status Report

The file status report tab is straightforward. It is a list of all the file formats found in this publisher’s content and the number of files in that format in the statuses which Portico tracks.

The possible statuses are:

- **Well Formed and Valid**: the file completely matches its format specification
- **Well Formed and Not Valid**: the file matches its format specification, but has an ill-formed value in the metadata (or, in the case of XML, if the file parses, but does not conform to its DTD or schema)
- **Not Well Formed**: the file does not match its format specification
- **Not Determined**: the file format does not yet have a validation module in JHOVE (as the community develops validation modules for these other formats, Portico will check...
these preserved files for format validity and cache sufficient technical metadata to administer the archive)

**Browsing a Journal**

From the journal summaries tab of the publisher page or from the electronic journals page (see the top navigation bar), you can browse to view the volumes and issues preserved for any journal. Below is an example from the American Astronomical Society.

Selecting any of the issues will take you to an issue table of contents. Note that what is presented is an issue table of contents built on the data that Portico has for the publisher. In the majority of cases, this will match what the publisher has published, but it may not always. Please be aware that Portico may have duplicate articles—Portico is implementing several deduplication systems that will eventually merge duplicate articles.
The links under each article citation offer different views of the preserved content. The most likely options for e-journal articles are:

- **PDF**: the article view page will open with the PDF file open in the content frame
- **HTML**: the article view page will open with the full-text HTML of the article open in the content frame
- **Additional Information**: the article view page will open with the header-text HTML (bibliographic metadata only) of the article open in the content frame
- **Preservation Information**: a small slice of preservation metadata for the article will open in the content frame of the article view page

- **Tree View**: the article view page will open with a tree layout of the article and its files as represented within the Portico content model

- **PMD**: the XML of the Portico PMD (preservation metadata) file will open in the article view page

- **XML**: either the Portico XML file will open in the content frame of the article view page or a list of Portico XML files will open (the publisher supplied XML file is preserved, but it is not available for audit by librarians)

In the top right corner of the article view page is a button to show the “compare view” version of the page. This will let you open two different files associated with the article side-by-side.

A few examples of the article view page are below (note how the same links found under the citation on the list page can be found as tabs on the article view page).
Astronomy Education Review

2013, AER, 12(1), 010101, http://dx.doi.org/10.3847/AER2012042

Astro 101 Students’ Perceptions of Science: Results from the Thinking About Science Survey Instrument

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Astronomy Education Review

AER

ISSN: 1538-1515

DOI: 10.4867/AER2012042

Copyright year: 2012

Copyright holder: The American Astronomical Society

Volume: 12, Issue: 1, December 2013

Electronic Id: 010101

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History: (Received: 10 August 2012; accepted: 4 January 2013; published online: 15 February 2013, 2013-02-15T09:27:11)

Abstract
Tree
## Compare View

### ASTRONOMY EDUCATION REVIEW

*ASTRONOMY EDUCATION REVIEW v. 12, n. 1*

- **Title:** Astro 101 Students’ Perceptions of Science: Results from the *Thinking About Science* Survey Instrument
- **Authors:** Colin S. Wallace, Edward E. Prather, Benjamin H. Hendelsohn
- **ISSN:** 1539-151X
- **DOI:** 10.3647/AER2012042
- **Copyright year:** 2013
- **Volume:** 12
- **Issue:** 1

**Abstract**

We administered two web-based instruments to help students reflect on their science learning: *thinking about science* (TAS) and *affinity for science* (AFS). We also conducted a survey of student attitudes toward traditional lecture instruction, online learning, and other educational contexts. We summarize our findings in this paper.

**Introduction**

We incorporated many forms of non-traditional teaching strategies in our astronomy classes to help students engage with the material, such as *thinking about science* (TAS) and *affinity for science* (AFS) surveys, peer learning, and group discussions. We also conducted a survey of student attitudes toward traditional lecture instruction, online learning, and other educational contexts. We summarize our findings in this paper.

**Astronomy Education Review**

- **ISSN:** 1539-151X
- **DOI:** 10.3647/AER2012042
- **Copyright holder:** The American Astronomical Society
- **Volume:** 12
- **Issue:** 1
- **Electronic Id:** 010101
E-Journal Completeness Report

In order to address content that has never been delivered to Portico, it is necessary for Portico to understand what content it should have received—in essence, necessary for Portico to know the publication pattern of the journal. Unfortunately, there is no master list of issues published. Thus, over the past several years, Portico has developed a missing issue completeness tool to 1) analyze the Portico preserved content and predict the publication pattern of each journal (the number of issues per volume), 2) to take that information and identify issues that are possibly missing or incomplete, and 3) to take the information of content that is missing and identify whether the content is on hand but with content issues to be resolved or has never been sent to Portico.

The analysis is a three pass process. The software walks through the preserved content for every journal and analyzes the publication patterns. It uses the information it has found to theorize the number of issues published in each year by the journal. For example, the Portico tools have guessed that the publication pattern for ACS Catalysis, an American Chemical Society title, is as follows:

- 2010: 12 issues
- 2011: 12 issues
- 2012: 12 issues
- 2013: 12 issues
- 2014: 12 issues
- 2015: 12 issues

The second pass of the analysis is to identify what issues might be missing from the Portico archive, given the issues we have on hand and the issues we have predicted should exist. This second pass also considers which issues might be incomplete, a determination made by considering the average number of articles published in the issues of this particular journal and the page numbering of articles within the issue. Issues will be identified as either missing, incomplete, or unknown (which means we have content for the issue, but are not confident the issue is complete—this will often occur when the page numbers of a volume run sequentially through all the issues and Portico has not yet preserved all of the issues for the volume).

The completeness analysis described above is used by Portico to request missing issues from the publishers. It is also used internally for reporting purposes and a flavor of it is made available in the Dashboard in the form of a matrix called the Completeness Page. These completeness pages are available from both the journal browse page:

![Portico Dashboard](image)
And the journal summaries tab on the publisher page:

Selecting any of these links will open a new web browser tab with a matrix where the volumes are listed along the y-axis and the issues along the x-axis. Each issue has a cell and its status, publication date, and number of articles preserved can be found in each cell.
By Portico’s assessment, the journal *Gothic Studies* is complete and is not missing any content.

Below is the completeness page for *ACS Catalysis*, which has some statuses besides “Complete” on the issues:

![ACS Catalysis Completeness Page](image)

Above we can see that while Portico has content from v. 1 (2), v. 2 (1, 5), and v. 4 (7, 11) the analysis code was not willing to unequivocally state that these three issues were complete, and thus they have been given a status of “Unknown” or “Incomplete”. In addition, the Portico archive is missing several expected issues.
Books

A listing of all the books currently preserved in the Portico Archive is available by selecting the “Electronic Books” tab at the very top of the page.

Each book listed has been preserved in the Portico Archive. As with journals, there are a number of links underneath each book, each opening up a different file or list of files associated with the book in the book view page. The most likely options for e-books are:

- **Table of Contents**: a pretty, abbreviated HTML version of the book with links to the chapter PDFs will open in the content frame

- **Additional Information**: a full rendition of the HTML version of the book will open in the content frame
• **PDF**: the book view page will open with the PDF file open in the content frame

• **PDFs**: the book view page will open with a list of the PDF files for this book open in the content frame

• **Preservation Information**: a small slice of preservation metadata for the book will open in the content frame of the book view page

• **TreeView**: the book view page will open with a tree layout of the book and its files as represented within the Portico content model

• **PMD**: the XML of the Portico PMD (preservation metadata) file will open in the article view page

• **XML**: either the Portico XML file will open in the content frame of the article view page or a list of several Portico XML files will open (the publisher supplied XML is preserved, but it is not available for audit by librarians)

The book view pages look just like the e-journal article view pages.

## Reports

There are a number of reports available on the Reports page, including facts and figures, archive growth, XLSX files listing preserved books, journals and digital collections.
Search

There are four ways to search in Portico:

1. By keyword or ISSN is the journal title or ISSN field
2. By keyword or ISBN in the book title or ISBN field
3. All descriptive metadata (which is very useful when you would like to find an article for which you have a DOI).
4. A multi-line keyword search, which works just like search options 1 and 2, but lets you search for multiple titles with multiple keywords at one time.

All search options are available in the left hand navigation bar. Some example search results are below.

Searching journal titles for “pulmon”:
Searching book titles for “spina bifida”:

- Living with Spina Bifida
  - Adrian Sandler, M.D. (2004/03/15)
  - ISBN: 978-1469604420, 1469604620
  - DOI: 10.2149/9781469604420_sandler
  - Portico Item ID: ar:/27927/pb5659v3w
  - Table of Contents | Additional Information | PDFs | Preservation Information | Tree View | PMD | XML

- Living with Spina Bifida: A Guide for Families and Professionals
  - Sandler, Adrian (2004)
  - ISBN: 978-1469604420, 1469604620, 9780807855478
  - Portico Content Set: Project HUISE E-Books
  - Portico Item ID: ar:/27927/pb6555jcw
  - Table of Contents | Additional Information | PDFs | Preservation Information | Tree View | PMD | XML

- The China-US Partnership to Prevent Spina Bifida
  - Deborah Kowal (2015)
  - ISBN: 978-0216722230, 0216722230
  - Portico Content Set: Project HUISE E-Books
  - Portico Item ID: ar:/27927/pb6555jcw
  - Table of Contents | Additional Information | PDFs | Preservation Information | Tree View | PMD | XML

- The Spina Bifida
  - ISBN: 978-82-470-0565-1
  - DOI: 10.1007/978-82-470-0565-1
  - Portico Content Set: Springer E-Books
  - Portico Item ID: ar:/27927/pb6555jcw
  - Table of Contents | Additional Information | PDFs | Preservation Information | Tree View | PMD | XML
Searching all metadata for “spina bifida”:
Portico also provides a multi-line search. This search form allows you to enter multiple sets of keywords, one set per line. It is useful if you want to look up a list of titles. For example, you could enter a multi-line keyword search across journal titles like this:

![Multi-line Search Form](image)

And it would produce the following results, which include all journal titles with the text “pulmon” in the title plus all journal titles with ISSN “13627937” plus all journal titles with the text “textile” in the title:
Any Questions?

Just contact Portico user support at support@portico.org with any questions or comments.