Use Case 1.2: Tag scholarly information resources to support reuse

> *Example story: As a librarian, I would like to be able to tag scholarly information resources from one or multiple institutions into curated lists, so that I can feed these these lists into subject guides, course reserves, or reference collections. I'd like these lists to be portable (into Drupal, into LibGuides, into Spotlight! or Omeka, into Sakai, e.g.) and durable. I'd like these lists/tags to selectively feed back into the discovery environment without having to modify the catalog records.*

This use case is similar to 1.1 in a number of ways, and perhaps the data model would be the same. However, the likely scale of tagging is much larger (perhaps selection of O(100,000) items to populate a virtual subject library from the central library catalog) and does not include the need for detailed curation (textual annotation, ordering, structure, description). It is expected that such tagging would also be maintained/curated over long periods whereas virtual collections may be disposable or ephemeral. It is also expected that creation and maintenance might be a collaborative process.

There are possible ties to shared selection work such as that between Stanford and Berkeley, and between Columbia and Cornell.

Out of scope: Free text tagging. Development of shared controlled vocabularies for tags (though likely this would be wanted to cross-institutional librarian use). Dynamic tagging via a query that selects a set of items every time it is run (Note that Cornell CuLLR does use dynamic selectors but there are run only periodically as opposed to each time the curated list is used).

Potential Demonstrations

A. *Selection of items for a virtual library which then appears in a centralized discovery interface:* Subject librarians select a items to tag individually and through queries available in the discovery interface (such as subject classification range, bibid range). They tag items with a tag meaning "included in university X, virtual library Y". The tag information is stored as LD separately from the catalog records and refer to them by URI. The discovery system integrates this tag information in its indexing process and produces a search facet for "virtual library Y".

Status 2015-02-22

Completed: The open annotation gem provides the infrastructure for semantic tags for controlled vocabularies. Some planning has occurred to identify rules (i.e., bibid range, LOC call number range, subject classification, controlled vocabulary value, etc.) based on work in the CuLLR system at Cornell. Inclusion of resources from other institutions is supported on a one resource at a time by copying the URI from other institutions catalog search.

Incomplete: Ability to specify semantic tags and selection rules are not implemented. Integration into the catalog with search facets is not implemented. Batch processing tools are not implemented. Cross-site selection of multiple items from a single search implementation is dependent on Use Case 6.1.

B. *Engineering librarians build virtual reference shelf*: In moving from a physical engineering library to a virtual library the engineering librarians decide to replicate online the popular shelf of key engineering reference handbooks that used to in the physical engineering library. In collaboration with the team providing their local discovery and access system, they decide on a tag that will be used to create an "Engineering Handbooks" facet. Tags are internally represented as URIs though the UI will likely show a human readable string. As the different librarians are specialists in different subject areas they decide to work together to tag items in their respective areas. One librarian creates the tag. They each then tag items from the catalog. These tags are then used in the local discovery and access system to populate the "Engineering Handbooks" facet.

Status 2015-02-22

Completed: The open annotation gem provides the infrastructure for semantic tags for controlled vocabularies where semantic tags are represented as URIs.

Incomplete: Authentication and access controls, roles, and groups are not implemented, which is required for collaborative building of curated library collections. Questioning Authority gem will likely be used for the encoding of controlled vocabularies. There isn't a user interface for setting up questioning authority.

Data Sources

- Catalog records
- Metadata for any other collections from which items are to be selected
- Librarian<->library relationships (perhaps including editing permissions information)

Ontology Requirements

- Ability to add contextualized tag information to items. Assume that all tags will resources (with label) rather than simply free-text and use OAC.

Engineering Work

- Authentication as librarian or other user allowed to create/edit tags. It should be possible for one of a set of librarians to apply a tag in a given context (e.g. all Engineering librarians at an institution can add certain tags for the Engineering library)
- Support for controlled vocabularies of tags
- Ability to tag item from remote system
- Bulk selection method to support selection by resource characteristics (could be "select all" for a set of search results)
- Ability for local system to understand provenance of tags so that only locally added tags are used to select items in the local virtual library (for example)
- Need URI for each tag that provides machine readable (and perhaps human readable via conneg) data for integration into other systems
- Means for selection and manipulation of tag data to feed into discovery environment alongside MARC record or other controlled data (what happens to tags for remote items?)
- UI will require a way to support selection by resource characteristics rather than individual items (could be "select all" and/or "check boxes" for a set of search results). This doesn't create any additional model requirements.

Who will do what?

- See Use Case 1.1: Build a virtual collection