Intrallect intraLibrary 3.7: Librarian's Guide

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1. Introduction

IntraLibrary has four types of user role: User, Contributor, Librarian and Administrator.

- Like all Users, Librarian users are able to search, browse and download resources from the library; see *Getting Started- Finding and Using Resources* for more information.
- Like Contributor users, they are also able to contribute resources to the library and create metadata and classifications for these resources; see *Getting Started- Uploading and Cataloguing Resources* for more information.

However, there are also some additional tasks within intraLibrary that Librarian users are able to carry out, these are described here. The Librarian role is aimed at users who are concerned with managing resources and metadata in an installation of intraLibrary, but who do not need to be involved in Administrator tasks such as user management and system configuration. System roles based on the Librarian-type may have the following privileges additional to a Contributor-type role:

- Edit taxonomy (classification system)
- Change resource collections
- Delete a comment
- Unreserve resources
- View workflow status

This manual gives an overview of all of these functions in intraLibrary.

2. Classification System Management

2.1. Classification Systems in intraLibrary

Resources within intraLibrary may be discovered by users through searching or browsing. Browsing the library is enabled through the use of classification schemes, or taxonomies, which appear in the left-hand screen in the *Browse* view. Resources are associated with nodes on these classification systems via the *Classification* fields in the resources' metadata. IntraLibrary can support multiple classification systems for classifying resources, and any resource may be classified at any number of nodes in a system or systems.

Although a classification system may sometimes appear visually like a file hierarchy it is important to understand that they are significantly different. In a file hierachy the files are

located at only one place in the tree structure. In a classification system the file is located in the database and links to that file can exist in many places in the classification tree. This allows classification to be used to locate a resource in all the places where it might logically be relevant, for example an image of the amphitheatre at Pompeii might be classified under Theatre, Italy, Tourism, Archeology, Ancient History.

IntraLibrary is supplied with no classification systems by default. At least one classification system must be created or imported before contributing users can classify their resources. If resources or metadata files are being imported into the library with classifications already completed, any classification system used must be added to the library *before* the resources or metadata are imported.

IntraLibrary supports the IEEE Learning Resource Metadata (LOM) standard, and the IMS Learning Resource Meta-data specification that it is based on. In the LOM, classification schemes or taxonomies can be used to classify resources for various purposes, e.g. by discipline (subject), accessibility, educational level, competency or prerequisite. This means that an installation of intraLibrary can support browsing of its resources in a number of different ways, for example, one or more of the following:

- Using a common subject-specific classification (e.g. MeSH for medical resources).
- Using a general or universal subject scheme, (e.g. the Dewey Decimal Classification).
- Using a local taxonomy based on local curricula, competencies or prerequisites, etc.

2.2. Adding a Classification System: First Steps

There are two ways to add a classification system to intraLibrary:

- manually in the taxonomy editor, or;
- by importing the scheme as a ZThes file.

For both methods, you must begin by creating an entry point for the system in the browse tree, and entering some details about the system, as follows:

1. Click on the *browse* button in the toobar near the top of the screen.
2. Click the *edit classification systems* button at the top right of the left-hand pane: .
3. Click the *add taxonomy* button in the classification system tool bar to add details (*properties*) about the classification system: .
4. Enter the properties of your classification system (see table below) and click *update*.

Property	Purpose	Examples
Classification System Name	This will appear as the name of the classification system in the *Browse* view	Dewey Decimal; MeSH; LearnDirect; Accessibility Features; Local Competency Scheme
Description	The text of the description will appear when a user hovers over the name of the classification system.	"Browse here by specific medical topics"; "Local Authority classification for school curricula"
Source	This property uniquely identifies the classification system, both within intraLibrary and externally for metadata harvesting, sharing metadata records, etc. Because of this, it cannot be edited once resources are classified under this classification system. If you wish to change this property you will have to remove any resources from this classification system by putting them back into a workflow and deleting the classification.	
Language	Select the language of the classification system from the drop-down menu.	
Order Sections By	Selecting *name* means that the nodes of the classification system will be listed in the left-hand *Browse* view alphabetically. Selecting *reference id* means that they will be listed according to identification numbers associated with them in the library's underlying database. Reference IDs may be applied whether adding the classification system manually, or importing it as a ZThes file (the ZThes property *termID* is used in intraLibrary's	

	Reference ID field).	
Colour	Colour coding is used to visually distinguish between multiple classification systems in the *Browse* view.	

2.3. Adding a Classification System Manually

Once you have created a top-level node for your classification system and entered details about it, as noted above under section 2.2 Adding a Classification System: First Steps, you can continue adding the classification system manually, using the buttons on the classification systems toolbar. The functions available are:

- Add node.
- Delete node.
- Cut node or sub-tree.
- Paste node or sub-tree.
- Import classification system (see below in section 2.4 Importing a Classification System).

Adding nodes to your classification system:
1. Click on the *browse* button near the top of the screen.
2. Click the *edit classification system* button at the top right of the left-hand pane: .
3. Click on the name of the classification system you wish to add nodes to. It should then be highlighted.
4. To add the first level of nodes to this classification system, click on the *Add node* button in the toolbar: . A *Section Editor* form will appear in the right-hand screen, with four fields to be filled in: *name*; *description*; *ref id*; and *use for*. For explanations and examples of these fields, or node properties, see the table below.
5. Once you have added a node or nodes to the first level below the classification system name, you can continue to add further nodes: click on the node which you want to add a lower level of nodes to, and follow step 4 above.

Property	Purpose	Examples
Name	*This field is compulsory.* Enter the name of the node (sometimes	For a medical education subject taxonomy: "Nursing practice"; For

	known as the *preferred term*) as you want it to appear in the classification system in the *Browse* view.	a local geographical classification: "Glasgow (Scotland)"; For classifying by educational purpose: "Multichoice questions"; For an accessibility taxonomy: "Usable with screen reader"; etc.
Description	Scope notes, usage notes or other information about the node may be entered here. These will appear when browsing for resources, near the top of the right-hand screen and also when hovering the mouse over the taxonomy node.	"All resources that may be used with a screen reader are classified here"; "Only used for research papers about communism as a political system, movement or ideology. Papers about the Communist Party are classified under Political Parties"; "Competency: These learning resources support students learning to prepare and administer injections"
Ref Id	*This field is compulsory.* The *ref id* for the node will determine in what order the nodes are listed in the classification system in the *Browse* view, when the *Order Sections By* property of the system is set to *ref id*. See above under section 2.2 Adding a Classification System: First Steps for more information. The Ref Id is effectively a code and should therefore *not* be language specific. It should not, for example, contain accented characters. When sections are ordered by Ref Id they are in fact sorted alphanumerically based on text in the RefId. This means that if numbers are to be sorted numerically they must all have the same number of digits, for example 001, 002, .. 012, 013,	001.1; A235

	etc. Or they can also include letters: A001, A002, B001, B002, etc.	
Use For	Alternative terms for a node may be entered here. They will appear when the mouse hovers over the node in the classification system in the *Browse* view. To enter more *use for* terms, click on the ![button] button for each new term. This will open a new text box.	Where the node name, or preferred term, is ***Mountain Lions***, *use for*, or alternative terms, might include *Pumas* and *Cougars*.

Once a classification system has been added to intraLibrary, it will be necessary for an Administrator user to set up access to that classification system for relevant collections, in order for it to be visible to users. See the intraLibrary manual ***Administrator's Guide*** for more information.

The fields used to set up a classification node can be used in searches. To discover all the resources classified in a specific node the fields specified above can be used as shown in the table below.

Property	Search parameter
Name	Classification
Description	Classification Node Description
Ref Id	Classification Node Identifier
Use For	Use For terms can also be searched under Classification Node Description.

2.4. Importing a Classification System

Classification systems may be imported into intraLibrary from an XML file in ZThes format (http://zthes.z3950.org). IntraLibrary currently supports:
- ZThes termName. These terms will be used in the *name* field in intraLibrary node properties. They will appear as nodes in the library browse tree.
- ZThes termType PT (Preferred Term). The presence of PT as the termType indicates this is the definitive element for that term.
- ZThes relationTypes NT (Narrower Term) and BT (Broader Term). These elements determine the hierarchical structure of the classification system in the library browse tree. In fact the NT terms are ignored in intraLibrary and the all terms are defined as

being children of terms to which they are related with BT.

- ZThes relationType UF (Use For term). These terms will be used in the *use for* field in intraLibrary node properties. They will appear when the mouse hovers over a node in the library browse tree.
- ZThes termID. These identifiers will be used in the *ref id* field in intraLibrary node properties. The *ref id* for a node or term will determine in what order the nodes are listed in the classification system in the *Browse* view, when the *Order Sections By* property of the system is set to *ref id*. See above under section 2.2 Adding a Classification System: First Steps for more information.
- ZThes termNote. These terms will be used in the *description* field in intraLibrary node properties.

To import a classification system:

1. Click on the *browse* button near the top of the screen.
2. Click the *edit classification systems* button at the top right of the left-hand pane: .
3. Add the classification system's name and details as described above in section 2.2 Adding a Classification System: First Steps.
4. Click on the name of the classification system in the browse tree, highlighting it.
5. Click the *import taxonomy* button: . An *import taxonomy* window will open.
6. Browse your local file system and select the ZThes file for the classification system you want to import.
7. Click the *Import Taxonomy* button.
8. If your file is a valid ZThes file, you will see your classification system appear below its name in the browse tree in the left-hand screen. Otherwise you will see an error message.

Once a classification system has been added to intraLibrary, it will be necessary for an Administrator user to set up access to that classification system for relevant collections, in order for it to be visible to users. See the intraLibrary manual ***Administrator's Guide*** for more information.

2.5. Editing or Deleting a Classification System

Classification systems in intraLibrary may be edited or deleted, whether they were added manually or imported as ZThes files. Sections of classification systems, i.e. individual nodes plus all of the nodes underneath them (known as *children* of the node) may be deleted. Sections of classification systems (i.e. nodes and their children) may also be imported as ZThes files.

Editing a classification manually: Individual nodes in a classification system may be edited by clicking on the *edit* button on the toolbar: , then clicking on the node. A *Section Editor* form will then open in the right-hand screen. See the table above under section 2.3 Adding a Classification System Manually for more information on the node properties that you can edit. Nodes may also be added, deleted, or cut-and-pasted manually, using the buttons on the classification systems toolbar. The functions available are:

- Add node.
- Delete node.
- Cut node or sub-tree.
- Paste node or sub-tree.
- Import classification system (see above in section 2.4 Importing a Classification System).

NB: If a node or any of its children have any resources classified against them, you will only be able to edit the *use for* terms and the *description* for that node. You will not be able to edit the *name* or *ref id* for that node, nor will you be able to delete the node. In this case you will need to move the resources classified there into a workflow and delete the relevant classifications from their metadata in the *Classification Editor*.

Editing a classification in ZThes format: IntraLibrary does not support *export* of ZThes files. To edit a classification system that was imported in ZThes format, you can edit it in the intraLibrary interface; however, this will not change your original ZThes file. If you choose to edit the ZThes file itself, you can delete the original classification system from intraLibrary, by clicking on its name and clicking the *delete node* button in the toolbar: .

You can then import the new version. NB: Deleting a taxonomy means that any resources that were classified there will need to have their classifications saved again in the *Metadata Editor* when the taxonomy is re-imported. For more information, see below under ***Deleting a classification system***.

It is also possible to import sections of classification systems (individual nodes and their children) as ZThes files, by clicking on the node underneath which you wish to import the section, and following the instructions given above in section 2.4 Importing a Classification System.

Deleting a classification system: A classification system may be deleted whether or not

there are resources classified there. If there *are* resources classified there, a warning message will appear if you attempt to delete the classification system: "Do you want to force deletion? This section or its children have resources classified against them." Click OK if you still want to delete. Any resources classified against the deleted system will retain all classifications in their metadata. If you re-import the same classification system, you can re-classify these resources using the *Classification Editor*:

- While in your *work area*, click on the *Edit Metadata* button next to the resource in question to enter the *Metadata Editor*. NB: You will need to ensure the resource is in a workflow that you have access to.
- In the classification section you will see the relevant classification listed. Simply click *save* or *save and exit*, then complete whatever processes you need to complete to re-publish the resource. The resource will then appear when browsing the appropriate node in the classification system, in the *Browse* view of the library.

NB: IntraLibrary uses the ZThes property *termID*, or intraLibrary property *ref id*, to identify classification nodes, not the name of the node. If you have edited the name of the node at which the resource is classified, the resource will still be classified at that node, but with the old node name still appearing in the metadata for that resource. To change the classification as it appears in the resource's metadata you will need to delete the classification while in the *Classification Editor* and go through the process of classifying the resource against the new node name. If you have edited the termID in the ZThes file, the resource will *not* be re-classified against the node as noted in the steps above.

However, any other editing or deleting of any of the nodes within a classification system can only be carried out if there are no resources classified anywhere in that classification system. This includes resources that are still in someone's *Work Area* and haven't yet been published to the library.

3. Management of Resources

3.1. Introduction

As well as managing classification systems, Librarian users of intraLibrary are able to carry out the following tasks involved in managing the contents of the library:
1. Viewing the group, workflow and collection history of any resource.
2. Moving resources into any group and workflow stage.
3. Changing which collections resources belong to.

4. Deleting comments on resources
5. Moving and changing collections for resources in bulk using *My Basket*.

3.2. Viewing Information about Resources

For Librarian and Administrator users, the "Things you can do with this resource" section of the resource page includes a *workflow* option accessed by clicking the . Selecting

workflow opens a pop-up window which shows information about the group the resource belongs to, and the workflow stage the resource is in, if any. If the resource is not in a workflow the pop-up box will say: "This resource has completed the workflow". If the resource is reserved by a user, the pop-up window will give the user's name with the reserved icon: . Clicking the reserved icon will un-reserve the resource, putting it into the

Available area for the current group which has access to the workflow it is in. Un-reserving the resource also allows an Librarian or Administrator user to move, delete or change collections for the resource.

The *workflow* pop-up window also includes a link to show the full workflow history for the resource. When clicked on, the pop-up then shows a *Resource History* view. This view includes a table showing all previous workflow processes carried out on the resource. For each process, the table indicates the date, time, previous group, current group, previous stage, current stage, collections, workflow process, the specific action taken, and the user who carried out the action.

3.3. Changing the Group and Workflow for a Resource

For Librarian and Administrator users, the resource page includes a *move* option available in "Things you can do with this resource". You can move resources that have not been reserved by a user into any user group and workflow stage by selecting this option. If you wish to move a resource that has been reserved by a user, you will need to follow the instructions for un-reserving resources above in Viewing Information about Resources.

Once you have selected the *move* option, you will see a pop-up window that contains a form allowing you to select a group and workflow stage to put the resource into. You can also add comments about the resource and what you are doing with it. This comment will be made available to whoever is working on the resource in their *Work Area*; they will need to click on the *workflow* option from their resource page, then view the resource's history, to

read it.

3.4. Changing the Collections for a Resource

For Librarian and Administrator users, the resource page includes a *move* option available in "Things you can do with this resource". You can put any resource that has not been reserved by a user into any collection by selecting this option. If you wish to move a resource that has been reserved by a user, you will need to follow the instructions for un-reserving resources above in Viewing Information about Resources.

Once you have selected the *move* option, you will see a pop-up window that contains a form that lets you select the collections you want the resource to be in. It is possible to select more than one collection:

- on Windows, GNU/Linux or UNIX: hold down the "Ctrl" key.
- on Apple Macintosh: hold down the "Command" key.

Click on highlighted items to deselect them.

3.5. Deleting Comments

While a Librarian user type canmnot delete resources owned by others they do have the ability to delete comments made by anyone on resources. This enables Librarian users to "police" derogatory comments. On the resource page Librarians will see a small delete icon next to each comment which will delete the comment when clicked.

3.6. Moving and Changing Collections for Resources in Bulk

Librarian and Administrator users may move multiple resources to a different collection or collections, or to a different workflow stage, by adding the resources in question to your Basket. Then, when in your Basket, you can click *Move Basket Contents* or *Change Collections* to move/change all of the resources. A dialog box similar to that you see when moving individual resources will appear offering options for moving/changing. If any of the resources have been reserved by users, you will need to click on the *Unreserve Basket Contents* button in the left-hand pane first.