

ELOQUENT SYSTEMS INC

# Eloquent WebSuite™ Planning Guide

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Volume WS2 - Managing Authority Files



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This manual describes how the Eloquent WebSuite software controls the use of vocabulary throughout the knowledge base giving customers the benefits of a authority file, a thesaurus, or a taxonomy.

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# Introduction

## Who should read this guide?

The Planning Guide is for anyone preparing to use the Eloquent WebSuite applications – library, museum, archives, or records. It will help you plan to use the power of an integrated table of authorized terms for describing your holdings. You will learn how they support the data entry process as well as adding precision when searching the knowledge base.

## When should it be read?

If you have experience with knowledge bases you should read it prior to getting any training on your application. A novice may be anxious to get some initial training on the application to see how authorized terms are used and then read this prior to launching the major project of building the knowledge base.

You should read specific sections again after a few months of operation – when you are ready to start implementing features that were not essential at the start. Any new employee should read the relevant volumes and sections prior to being trained.

## What volumes apply to all WebSuite applications?

The four Eloquent WebSuite applications share much of the software. As a result the following manuals apply equally to all applications.

- Volume WS1 – Administrator Functions
- Volume WS2 – Managing Authority Files
- Volume WS3 – Structuring Data for Output
- Volume WS4 – Pointers, Hierarchies & Hyperlinks

## What is this volume about?

This manual describes how the Eloquent WebSuite software manages controlled vocabulary - in particular, files of authorized terms, a thesaurus, or taxonomy. Each of the four applications utilizes this type of controlled vocabulary. The manual covers features relevant to all of them.

## Overview

### Does the software support taxonomies, thesauri, pick-lists, authority files?

Yes, all of the above. The software gives you the Web-based tools to create and manage your own tables of controlled vocabulary. There are two types of tables:

#### ➤ Drop-down

The first is a short list of terms that are usually presented to the end-user as a drop-down list. Each entry can have two components: a brief descriptive name and a short code or acronym. The software refers to this tables as “support tables”. The dropdown can show both or just the name. Some may be short lists of types of items being managed:

- Types of resources – documents, PDF’s, pamphlets, books, photographs
- Categories of people – vendors, employees, customers, patrons, members
- Departments within the organization – sales, accounting, research, manufacturing

#### ➤ Authority file

Other controlled vocabularies are very large list of terms or names – too many to select from a dropdown list. Here are some examples:

- The names of all the authors for books in a library
- The names of all the file folders for an organizations records
- The names of all the categories of artifacts in a museum
- The names of all the creators of documents in an organization’s archives

Every application – archives, library, museum, records – in the Eloquent WebSuite takes advantage of well managed authorized terminology. It puts everyone in the organization “on the same page” when sharing a common knowledge base.

### Can this controlled vocabulary be shared between the four applications?

Yes, the four applications become a single knowledge base, making it easy to find information. Some of the support/authority files are shared by more than one application, while others may be relevant to only one.

### What is meant by “integrated” authority files?

Eloquent support tables and authority files are not used as “pick-lists” only. They become an ongoing integral part of the knowledge base. The term is not picked/copied from the authorized list to become part of the descriptive record. A pointer is established linking to it, so that it can be retrieved as required by the software. The end user gets to view it as part of the record. However, the authorized term remains in the database only once. Any changes to it are immediately and automatically recognized throughout the database.

## **Advantages of Integration**

### **Does integration save disk space?**

Yes, the term itself is stored only once, not with each of the descriptive records that may relate to it.

### **Can global changes be made?**

They are not required. Changes are made in the “one” place.

### **Is other information stored on the authority record?**

The record for every authority term has all the information making it comply with standards such as ANSI/NISO Z39.19 and ISAAR(CPF) – broader term, narrower term, non-preferred term, and others – of interest mostly to those cataloging the holdings. In addition there may be additional information of interest to most researchers, such as biographical history. This information resides in the database only once, on the authority record. On reports and other output it can be inserted into the detail for the hundreds/thousands of items that link to it.

### **How do I learn about all the other data fields on the authority record?**

The Web form used to enter all the data for an authorized term has HELP instructions for each data prompt. Most of it is derived from the publically available documentation for the specific standard, including the special DACS standards for archives.

### **Is the integrated design more complicated?**

No, it can be as simple doing a keyword search and picking from a list. All the sophisticated links and reciprocal links are established by the software. Researchers find the results intuitive and easy to grow into. Procedures are similar throughout the system.

## Searching with Precision

### Does searching become more complicated with integrated authorities?

No, it can be as simple as a Google-style keyword search. The authorized are indexed to be included in the keyword. Or, if the search window has multiple access points, the prompts for authorities such as subjects can be simple “word” prompts.

### How do you get more precision?

Experienced researchers can get more precise results by **pre-selecting specific terms**. A pre-search of the authority file will present a list from which to select the desired term(s). It is better than a simple alphabetical scroll of the authority file because it includes all terms with the search word(s) are anywhere in the term, not just in the first word position, or where it is a synonym or non-preferred term.

### How are broader and narrower terms supported?

If the authority term from a hierarchy with **broader and narrower terms**, researchers can go up and down the tree browse selecting the appropriate terms. They have the option of tagging a term and automatically getting all of its lower terms, no matter how many levels.

### Can authorized geographic names be identified on a map?

If the authorities are geographic names along with their GPS coordinates or postal codes the results of the selection can be points on a **Google Map**. Points on the map link back into the database for images and descriptive detail.

### Can I get many locations on the same map?

Yes, a special access point can prompt for types of geographic names – rivers, churches, historic buildings, or any other category relevant to your holdings. The result of a search will be all the locations on a single map.

### How do I get more information about the location on the map?

You simply click on the location to retrieve the descriptive information and related digital objects from the knowledge base.

### What if I use my term as a keyword rather than an authorized one?

That will not be a problem, as long as your term was included as a synonym or no-preferred term. Any number of other terms may be used and they all get the same results because of the standardization on the authorized term.

## **Cataloging with Consistency**

### **How do I link to the authorized terms when I catalogue an item?**

The same “keyword search” is used to find an existing authorized term. It is not necessary to know the exact term. If only one hit is found it will automatically be taken into the prompt to establish the link. If multiple hits are found they will be presented in a browse list from which you pick one or more. If you are not sure which one(s) are appropriate you can click an icon to display all the information about the term.

### **What do I do if I cannot find an appropriate term?**

If what you want cannot be found you can open the Web form for creating it.

### **What if I am not the person authorized to create terms?**

You may not even have the Create button on your Web form, so you will have to contact the authorized person. Or, if you have the ability you can create a skeletal authority record and leave it to the authorized person to edit and approve it.

### **How does the authorized person find, edit, and approve the skeletal records?**

That person has access to another menu item for that purpose. It will have the ability to find all the new terms created since a specified date. They are brought into the Web form as an active list where they can be processed one at a time.

### **Does the approval person know who created the skeletal records?**

Yes, the record is automatically stamped with the creator and the date. That information is useful for internal training of support people.

### **Will public researchers have access to all the information about the authorized term?**

Yes, they are usually given the ability to see more detail about any authorized term included in the detail display for the item or on the browse list when they are selecting a search term. However, they are shown only the need-to-know information, not all of it. In addition, the detail for some terms may be coded as not for public view. One example may be the biography of a proper name authority for a person that is still alive. The flag can be changed at a later date.

## **Management Utilities**

### **Can I pre-load authorized terms?**

Yes, if an appropriate source of authorized terms is available in electronic format, they can easily be loaded into an Eloquent authority table. The Eloquent staff will usually do this for a modest consulting fee. Or, sometimes the table you require may be available from another Eloquent customer. Another option is to manually enter all the terms that are relevant to your database in advance. Spreadsheet-style entry forms make the process very efficient. The hierarchical structure is very helpful in organizing the structure.

### **Can I import legacy data that contains subjects or proper names?**

Yes, your current data may be available from a legacy system or from a source such as MARC records for a library. In both cases the legacy source is usually a “flat-file” system where the terms are part of the item data and not stored in separate authority files. As these records are imported into the Eloquent system the necessary re-structuring is done. As a topical subject or a proper name term is encountered the authority table is searched for a match and if it exists a link is established. If a match is not found an entry is created. In the process the authority table is populated. However, since there was no vocabulary control in the legacy software the resulting authority file may need to be “cleaned up.”

### **Does the Eloquent software include tools for cleansing the authorities?**

When the legacy data is derived from a system that did not have a controlled vocabulary the resulting authority table will require cleansing. You will find several forms of what should be the same term. For example: “John Smith”, “Smith, John”, and “John A Smith” may all be the same person. You would want to keep one and remove the others. However, each has some records linked to it. You will want them all re-directed to the saved term. The Eloquent software has utilities to automate this process.