



Intralex intraLibrary 2.9: Librarian's Guide

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1. Introduction

IntraLibrary has four levels of user access: User, Contributor, Librarian and Administrator.

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

However, there are also some additional tasks within intraLibrary that Librarian users are able to carry out. The Librarian role is aimed at users who are concerned with managing objects 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. Librarian users can manage:

- Classification systems, or taxonomies, used in an installation of intraLibrary.
- Objects, particularly: which groups and collections objects are associated with; and, deleting objects.

This manual gives an overview of these functions in intraLibrary.

2. Classification System Management

2.1. Classification Systems in intraLibrary

Objects 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. Objects are associated with nodes on these classification systems via the *Classification* fields in the objects' metadata. IntraLibrary can support multiple classification systems for classifying objects, and any object may be classified at any number of nodes in a system or systems. For more information on how to browse intraLibrary, see the intraLibrary manual ***Getting Started- Finding and Using Objects*** for more information. For more information about classifying objects in intraLibrary, see the intraLibrary manual ***Getting Started- Uploading and Cataloguing Objects***.

At least one classification system must be created or imported before contributing users

can classify their objects. If objects 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 objects or metadata are imported.

IntraLibrary supports the IEEE Learning Object 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 objects 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 objects 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, inline 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 *browse library* in the main toolbar at the top of the screen.
2. Click the *edit* button in the classification system tool bar at the top of the left-hand pane: .
3. Click on the *library* node at the very top level of the browse tree in the left-hand screen. It should then be highlighted.
4. Click the green + sign in the classification system tool bar to add details (*properties*) about the classification system: .
5. Enter the properties of your classification system (see table below) and click *add*.

Property	Purpose	Examples
Classification System Name	This will appear as the name of the classification system in the <i>Browse Library</i> view	Dewey Decimal; MeSH; LearnDirect; Accessibility Features; Local Competency



		Scheme
Description	The text of the description will appear when the mouse 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 objects are classified here. If you wish to change this property you will have to remove any objects from this classification system by putting them back into a workflow and deleting the classification.	The CanCore Guidelines for implementing the LOM have some detailed guidelines and examples that may be useful.
Colour	Colour coding is used to visually distinguish between multiple classification systems in the <i>Browse Library</i> view.	
Order Sections By	Selecting <i>name</i> means that the nodes of the classification system will be listed in the left-hand <i>Browse Library</i> view alphabetically. Selecting <i>reference id</i> 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 <i>termID</i> is used in intraLibrary's Reference ID field).	
Language	Select the language of the classification system from the drop-down menu.	

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 *browse library* in the main toolbar at the top of the screen.
2. Click the *edit* button in the classification system tool bar at the top 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:  . An *Add a Section* form will appear in the right-hand screen, with four fields to be filled in: *name*; *ref id*; *use for*; and *description*. 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	<i>This field is compulsory.</i> Enter the name of the node (sometimes known as the <i>preferred term</i>) as you want it to appear in the classification system in the	For a medical education subject taxonomy: "Nursing practice"; For a local geographical classification: "Glasgow (Scotland)"; For classifying by educational

	<i>Browse Library</i> view.	purpose: "Multichoice questions"; For an accessibility taxonomy: "Usable with screen reader"; etc.
Ref Id	<i>This field is compulsory.</i> The <i>ref id</i> for the node will determine in what order the nodes are listed in the classification system in the <i>Browse Library</i> view, when the <i>Order Sections By</i> property of the system is set to <i>ref id</i> . See above under section 2.2 Adding a Classification System: First Steps for more information.	001.1; A235
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 <i>Browse Library</i> view. To enter more <i>use for</i> terms, click on the + button on the right of the form for each new term. This will open a new text box.	Where the node name, or preferred term, is Mountain Lions , <i>use for</i> , or alternative terms, might include <i>Pumas</i> and <i>Cougars</i> .
Description	Scope notes, usage notes or other information about the node may be entered here. These will appear when browsing for objects, near the top of the right-hand screen.	"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 objects support students learning to prepare and administer injections"



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.

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 termType PT (Preferred Term). These terms will be used in the *name* field in intraLibrary node properties. They will appear as nodes in the library browse tree.
- ZThes relationTypes NT (Narrower Term) and BT (Broader Term). These elements determine the hierarchical structure of the classification system in the library browse tree.
- 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 Library* 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.

To import a classification system:






1. Click on *browse library* in the main toolbar at the top of the screen.
2. Click the *edit* button in the classification system tool bar at the top 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.


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 objects 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 objects 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 objects 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 objects classified there. If there *are* objects 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 objects classified against them." Click OK if you still want to delete. Any objects 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 objects using the *Classification Editor*.

- While in your *work area*, click on the *Edit Metadata* button next to the object in question to enter the *Metadata Editor*. NB: You will need to ensure the object is in a workflow that you have access to.
- Click on *classify* in the toolbar to enter the *Classification Editor*.
- 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 object. The object 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 object is classified, the object 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 object's metadata you will need to delete the classification while in the *Classification Editor* and go through the process of classifying the object against the new node name. If you have edited the termID in the ZThes file, the object 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 objects classified anywhere in that classification system. This includes objects that are still in someone's *Work Area* and haven't yet been published to the library.

3. Management of Objects

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. Accessing any object in the library, whether it is published or unpublished.
2. Viewing the group, workflow and collection history of any object.
3. Moving objects into any group and workflow stage.
4. Changing which collections objects belong to.
5. Deleting any object.

3.2. Finding Any Object

IntraLibrary Users and Contributors have access to objects in the library according to what group they belong to and what collections those user groups have access to. Librarian and Administrator users have access to every object in the library. To make this possible there are two extra options a Librarian or Administrator user has when searching or browsing the library (see the intraLibrary manual **Getting Started- Finding and Using Objects** for detailed information on searching and browsing):

- Include unpublished objects.
- Include objects from all collections.

Librarian and Administrator users can select either or both of these options for any search or browse they perform.


Including unpublished objects: Selecting the *Include unpublished objects* checkbox will cause the search or browse to be reloaded. The new results listing that appears will include all objects in the library that meet the search or browse criteria, including all published and unpublished objects, even those that have been *reserved* by other users in their *Work Areas*. In the results screen, the listing for objects is colour-coded to help Librarian and Administrator users to recognise their different status. The colour codes are:

- Beige= published object.
- Grey= object that is not published.
- Red= object that is not published and has been reserved by a user.

Including objects from all collections: Like all users, Librarian and Administrator users



normally only see objects in collections that their group membership gives them access to. However, they can override this constraint by selecting the *Include objects from all collections* checkbox. This will cause the search or browse to be reloaded. The new results listing that appears will include objects from every collection in the library that meet the search or browse criteria.

3.3. Viewing Information about Objects

For Librarian and Administrator users, objects that are displayed in a search or browse results list have a *view status* button  alongside the usual buttons. Clicking this opens a pop-up window which shows information about the group the object belongs to, and the workflow stage the object is in, if any. If the object is not in a workflow the pop-up box will say: "This object has completed the workflow". If the object is reserved by a user, the pop-up window will include a link that enables you to unreserve the object.

The *view status* pop-up box also includes a link to *view full workflow history*. When clicked on, the pop-up then shows an *Object History* view. This view includes a table showing all previous workflow processes carried out on the object. 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.


3.4. Changing the Group and Workflow for an Object

For Librarian and Administrator users, objects that are not reserved by any user are displayed in a search or browse results list with a *move object* button  alongside the usual buttons. You can move any such object into any user group and workflow stage, by clicking on this button. If you wish to move an object that has been reserved by a user, you will need to click on the *view status* button  and click on the *unreserve* link in the pop-up window first.



Once you have clicked the *move object* button, you will see a pop-up window that contains a form allowing you to select a group and workflow stage to put the object into. You can also add comments about the object and what you are doing with it. This comment will be made available to whoever is working on the object in their *Work Area*; they will need to

click on the *view history* link in the *Work Area* to read it.

3.5. Changing the Collections for an Object

For Librarian and Administrator users, objects that are not reserved by any user are displayed in a search or browse results list with a *move object* button  alongside the usual buttons. You can put any object into any collection by clicking this button. This opens a pop-up box containing a form that lets you select the collections you want the object to be in. It is possible to select more than one collection.

3.6. Deleting Objects

Librarian and Administrator users may delete any unreserved object from the library at any time by clicking the *delete object* button: . If you wish to delete an object that has been reserved by a user, you will need to click on the *view status* button  and click on the *unreserve* link in the pop-up window first.