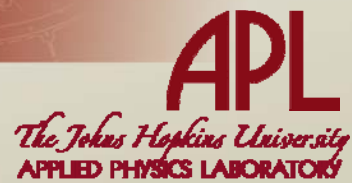


Subject Matter Expert Thesaurus Review: Improving Collaboration with Researchers

*By Gail Rayburn
October 22, 2009*



Necessity

Necessity, who is the mother of invention.

Plato, *The Republic*



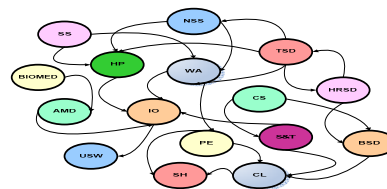
When people need something they don't have,
they invent something that meets the need.

Background

- I was hired as the taxonomist for the Johns Hopkins University/Applied Physics Lab (JHU/APL) in 2005 and was charged with creating an Enterprise Thesaurus.
- I began by creating a “seed” thesaurus, utilizing Applied Physics Lab (APL) documents and websites, and various external thesauri.
- Currently there are 15,000 preferred terms and 6,000 non-preferred terms. This is expected to more than double.
- I am using MultiTees Pro to manage thesaurus development.
- Thesaurus structure is based on ANSI/NISO Z39.19-2005: *Guidelines for the Construction, Format and Management of Monolingual Controlled Vocabularies*.

The Scope of APL's Work is the “World”

- Creating a thesaurus for APL is like trying to create a thesaurus for the World Wide Web. APL's functions form their own extensive web.
- Currently the APL Thesaurus has 41 major subject categories.
- Some of these subject categories consist of several domains collapsed into one. For example, *Social Sciences* includes anthropology, history, archaeology, linguistics, psychology and sociology.



Proposed Subject Categories

020 Agriculture	300 Events	580 Performance and Testing
040 Biological Sciences	320 Fabrication, Materials & Structures	600 Physical Sciences
060 Business and Organizations	340 Facilities and Real Property	620 Procedures and Processes
080 Communications	360 Government and Politics	640 Procurement and Requisitioning
100 Computers and Technology	380 Health, Safety and Medicine	660 Quality
120 Customers, Sponsors & End Users	400 Human Resources & Personnel	680 Science (General)
140 Data and Information	420 International	700 Security
160 Documents, Multimedia & Objects	440 Internet and Web	720 Sensor Systems and Detection
180 Economics and Finance	460 Legal and Regulatory	740 Services
200 Education and Training	480 Management	760 Social Sciences
220 Energy, Power and Propulsion	500 Mathematics	780 Space and Astronomy
240 Engineering	520 Microtechnology & Nanoscience	800 Travel, Transport and Vehicles
260 Environment and Weather	540 Military	820 Weapons
280 Equipment and Instrumentation	560 Modeling and Simulation	

Subject Matter Expert Review

- Due to the diversity and volume of APL materials, subject matter expert review of the APL Thesaurus is mandatory.
- In order to minimize the impact on APL staff, it was necessary that the method of review be efficient, with minimal impact on the reviewer's time.
- After an extensive search revealed that no COTS products facilitated subject matter expert review, it was decided that APL needed to create one - the *Subject Matter Expert Thesaurus Review Application*.

The Application

- The Subject Matter Expert Thesaurus Review Application is a Web-based, stand-alone application. It is not linked to any thesaurus development tool.
- The application has a report function.
 - ▶ These reports convey to the site administrator recommended changes, additions or comments made by the reviewers.
 - ▶ The site administrator, as gatekeeper, makes changes to the Thesaurus based on these recommendations.

Administrative Functions

The site administrator has access to a special administrative website. From this website, the administrator is able to:

- create batches of terms to send out for review
- notify a contact person via email that he has been assigned a batch of terms to review
- monitor the progress of review for each batch
- link directly to the user website for each batch
- access a report of recommended changes/additions for each batch
- update the *All Thesaurus Terms* list

Administrative Website

eXpert NETWORK Subject Matter Expert Thesaurus Review

Batch Management

	Batch Name	Batch ID	Total Terms	% Complete	Created On			
Select	Demo	58	358	0%	10/12/2009	Delete	Report	Go To Batch
Select	Demo2	59	179	0%	10/12/2009	Delete	Report	Go To Batch

Create New Batch

Batch Name:

Choose a Contact Person: Add

Contact Person: Delete
No records to display.

Email Body:
Dear (name),
Thank you for agreeing to participate in the subject matter expert review of proposed APL Thesaurus terms.

File with XML Data: Browse

Save Batch/Send Email Cancel

All Terms Upload

XML Term File: Browse Save All Terms

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Notification

A contact person receives an email from the site administrator notifying him that a batch of Thesaurus terms in his subject area is available for review. The email provides him with two links:

- ▶ the first link is to a short PowerPoint explaining what an Enterprise Thesaurus is
- ▶ the second link is to a review website that contains the batch of terms to be reviewed

Dear Petros,

You have been selected to assist in the subject matter expert review of proposed APL Thesaurus terms.

Before you begin, please follow this link to a short PowerPoint http://jshcrwebdec.07-031260V_Rayburn_BackgroundForSMTermsReviewApplication.pdf. This presentation will provide you with some background information that you need to know before you begin your review. This PowerPoint is also available in the responses list of the application for your reference. Additionally, you will find another link in the top menu bar to a Tutorial that may assist you in the process of review.

We would like each term reviewed at least once, but welcome as many reviews as possible. Once a term is reviewed once, it will move to the Already Reviewed column in the application, but it is still available to be reviewed again. Moving a term to the Already Reviewed column merely lets us know that the term has been reviewed at least once.

If you have any questions, comments or concerns, please contact either me or the site administrator, Gail Rayburn (82739). We appreciate your willingness to assist us in this endeavor.

To access the portion of the Thesaurus that you are being asked to review, please go to http://jshcrwebdec.jhuapl.edu/07-031260V_Rayburn_TermWorkTermWork.aspx?id=14.

Thank you.

Gail Rayburn
Department: ITSD
Johns Hopkins University
Applied Physics Laboratory
Extension: 82739
Gail.Rayburn@jhuapl.edu

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Review Website

Once logged in, the contact person is directed to the review website.
The review website consists of one page from which all processes are performed.



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Web Parts

The review page has eight web parts.



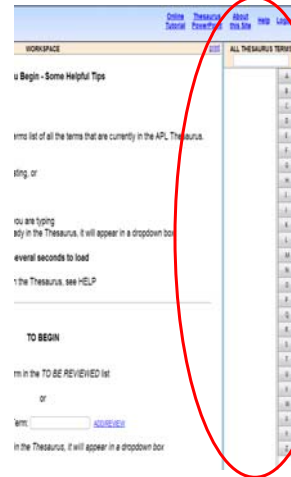
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All Thesaurus Terms

- Starting on the right side, the first column is the list of **All Thesaurus Terms**.
- This is a list of all the terms that are currently in the Thesaurus.
- This list is updated by the site administrator from the administrative website.
- To locate a term in this list, the user can either:
 - ▶ drill down through the alphabetical listing, or
 - ▶ begin typing the word in the text box



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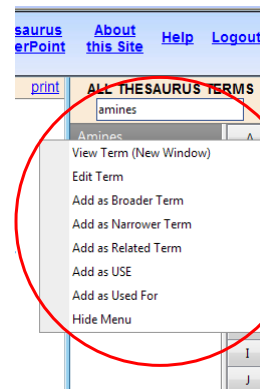
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Uses of the All Thesaurus Terms List

When a user clicks on a term in the *All Thesaurus Terms* list, a selection menu appears:

- ▶ **View Term** - the first choice in the menu allows the user to view that term and its associated information in a new window.
- ▶ **Edit Term** - the second choice opens that term in the *Workspace* and allows the user to edit the term and its associated information.
- ▶ **Add Term** - the remaining choices allow the user to add the term as a piece of associated information (e.g., broader term, related term, etc.) to a term that is being worked on in the *Workspace*.



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Workspace Homepage

Moving to the left, the next area is the **Workspace**.

The homepage of the website, providing helpful tips and a place to begin, resides in the **Workspace** until editing begins.



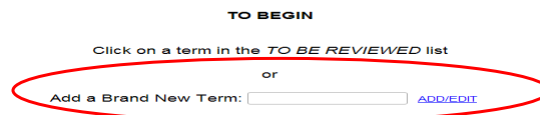
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Adding a New Term to the Thesaurus

- At the homepage, the user has the option of adding a brand new term to the Thesaurus.
- If the user elects to add a brand new term, he types it in the box labeled **Add a Brand New Term**.
 - ▶ As he types, a dropdown box will appear and, if the new term he has typed is already in the Thesaurus, it will appear in the dropdown box and can be edited by selecting **Add/Edit**.
 - ▶ If it does not appear in the dropdown, the user selects **Add/Edit** and the term will appear in the **Workspace** ready to have associated information added to it, such as scope note, broader term, etc.



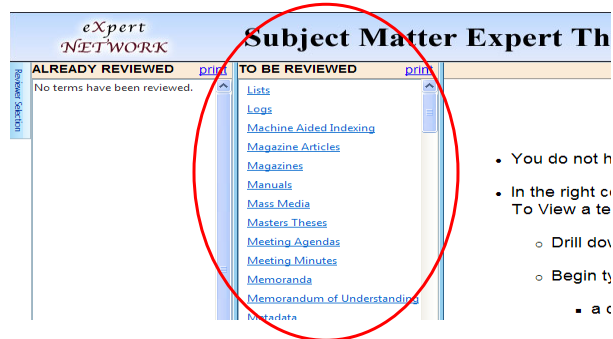
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To Be Reviewed

Moving still farther to the left is the *To Be Reviewed* list.
This column contains the terms the user is being asked to review.



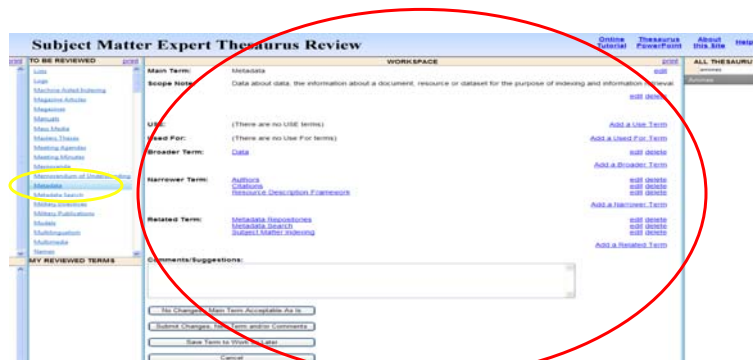
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Selecting a Term from the *To Be Reviewed* List

To select from the *To Be Reviewed* list, the user clicks on a term.
The term, and all its associated information, will then appear in the *Workspace*.



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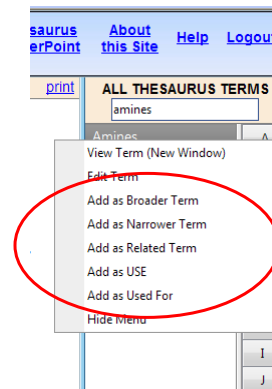
Editing Using the Function Keys

A term can be edited using the function keys: [edit](#), [delete](#), and [add a * term](#)



Editing Using the *All Thesaurus Terms* List

- ▶ As was mentioned in Slide 14, the user can add a term as a BT, NT, RT, USE, or UF from the *All Thesaurus Terms* list.
- ▶ When the user clicks on the term in the *All Thesaurus Terms* list that he wishes to add, a dropdown menu will appear.
- ▶ Selecting one of the “Add” options, adds this term (in the example, ‘amines’ would be added) to the main term that the user is editing in the *Workspace*.



Comments

The Comments box is available for any remarks, statements or explanations that the user would like to relate to the site administrator.

The screenshot shows the 'Expert Thesaurus Review' workspace. The 'Main Term' is 'Machine Aided Indexing'. The 'Scope Note' describes a method of indexing. The 'Use:' field is empty. The 'Used For:' field is empty. The 'Broader Term' is 'Subject Matter Indexing'. The 'Narrower Term' is empty. The 'Related Term' is 'Human Guided Algorithms Machines'. The 'Comments/Suggestions' text area is circled in red. Below the text area are buttons for 'No Changes - Main Term Acceptable As Is', 'Submit Changes, New Term and/or Comments', 'Save Term to Work on Later', and 'Cancel'.

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Submit Options

When review of a term is completed, there are several submit options.

The screenshot shows the 'Submit Options' section. The 'Narrower Term' is empty. The 'Related Term' is 'Human Guided Algorithms Machines'. The 'Comments/Suggestions' text area is empty. Below the text area are four buttons circled in red: 'No Changes - Main Term Acceptable As Is', 'Submit Changes, New Term and/or Comments', 'Save Term to Work on Later', and 'Cancel'. To the right of the buttons is the text: 'After selecting any of the submit options, the user is returned to the Workspace homepage to begin the process again.'

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Explanation of Submit Options

1. No Changes - Main Term Acceptable As Is

When a user has completed reviewing a term and found nothing missing, incorrect, or otherwise in need of editing.

2. Submit Changes, New Terms and/or Comments

When a user has made changes, added a new term or written a comment.

3. Save Term to Work on Later

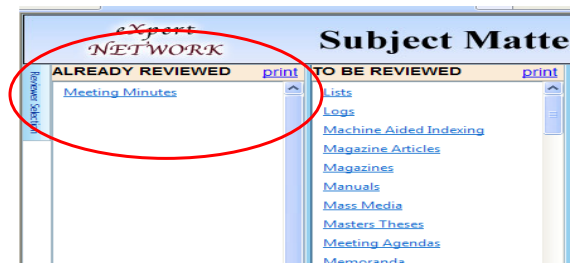
When a user has worked on a term, but is not ready to submit, the option exists to save the term and continue working on it at a later time/date.

4. Cancel

When a user initiates the review process, but decides to terminate the session without saving work performed, if any.

Already Reviewed

- A term is moved to the **Already Reviewed** column when the user submits any changes or indicates that the term and its associated information are acceptable as is, i.e., the first two submit options.
- When a term is moved to the **Already Reviewed** column, a report is generated for the site administrator.

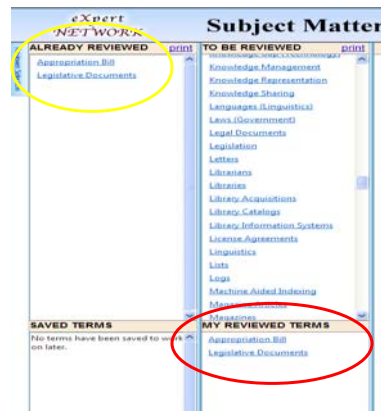


Reviewing 'Already Reviewed' Terms

- ▶ A term is moved to the *Already Reviewed* column after it has been reviewed once.
- ▶ However, a term in the *Already Reviewed* column is still available to be reviewed, either again by the same reviewer or by another reviewer.
- ▶ There is no limit on how many times a term can be reviewed.
- ▶ When a term is moved to the *Already Reviewed* column, it reverts to its original information. Any changes made during a review, are sent in a report to the site administrator, but they will not appear to any subsequent reviewers.
- ▶ In order to see what changes a user has made, he must look at the term in the *My Reviewed Terms* column.

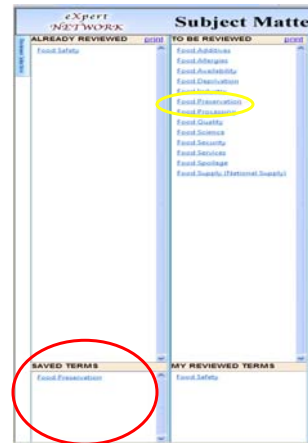
My Reviewed Terms

- When a term is submitted and moves to the *Already Reviewed* column, it reverts to its original format, because additional reviewers may want to review the same term and they need to see the original, not someone else's changes.
- However, the user may wish to see what changes he has recommended.
- Therefore, there is an area, *My Reviewed Terms*, where a user can view the changes he has made.
- Only the user who made the changes will see the changes.



Saved Terms

- ▶ Choosing *Save Term to Work on Later* will store the term and any edits the user has made in the **Saved Terms** area.
- ▶ Clicking on the saved term at any time will return it to the *Workspace*, ready for further editing.
- ▶ Note that a term that is stored in the **Saved Terms** area still remains in the *To Be Reviewed* column and is available to be reviewed by a different reviewer.
- ▶ A term does not move to the *Already Reviewed* column until the user submits his changes or indicates there are no changes.



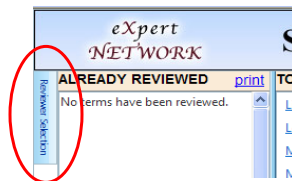
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Selecting Additional Reviewers

- ▶ The **Reviewer Selection** tab in the top left corner of the website is only visible to contact persons.
- ▶ This function is available to a contact person if he would like to ask other staff members to assist in the review.
- ▶ By mousing over the tab, a box will open, from which the contact person can notify other people, via email, that he would like them to review the assigned batch of terms.



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Reviewer Selection Box

There is a prewritten email that is sent to the new reviewer(s) with the same links that the contact person received.

Reviewer Selection

Choose a Reviewer: [dropdown] [Add]

Reviewer	Delete
No records to display.	

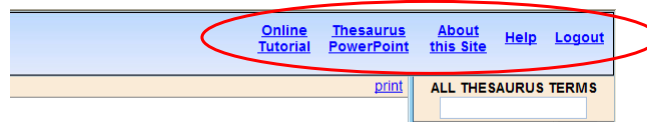
Email Body:
Dear (name),
You have been selected to assist in the subject matter expert review of proposed APL Thesaurus terms.

[Save Reviewers/Send Email]

Miscellaneous Functions

In the right corner of the top menu bar, there are five selections:

- **Online Tutorial:** a word document that walks the user through the review process
- **Thesaurus PowerPoint:** explains what a thesaurus is, its structure and how it is used
- **About This Site:** a general overview of the purpose of this review website
- **Help:** 1) provides a choice of emailing or phoning the site administrator, and 2) includes a "cheat sheet" that explains the notations (SN, BT, NT, RT, etc.)
- **Logout**



Thank You

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