

Why Use Cases?

Our team has been charged with redeveloping the OCLC Research (OR) website. To do this we need to have a reasonable understanding of how people need to interact with the site. We don't have time for extensive research on this topic, and the metrics we have to work with are quite limited. These use cases are an attempt to put ourselves into the shoes of our users. We have identified a number of "actors," both internal to the organization and external, and imagined the "goals" these actors have to accomplish on our site. The scenarios we have developed will help us identify the kind of functionality the site should possess.

The Actors

We identified 19 actors in our deliberations:

- **OCLC members**
- **RLG partners**
- **LAM staff** (we found staff of libraries, archives, and museums would have very similar goals, so we've combined them into a single actor)
- **external partners** (other partners who work with OCLC research on projects, not to be confused with "RLG partners")
- **external researchers** (these folks may not be actively partnering with OCLC research, but they are working in our domains of interest)
- **ischool researchers** (we use "ischool" broadly, including traditional library schools with this term)
- **ischool students**
- **digerati** (opinion leaders who promote a vision of digital technology and, in our case, its impact on libraries, archives, and museums)
- **press**
- **like orgs** (organizations in some way like OCLC research, friend or foe)
- **program officers and research scientists** (OCLC research staff who while they may have very different jobs in the organization seem to have very similar goals vis-à-vis our website)
- **OR developers**
- **OCLC developers**
- **outside developers**
- **seekers** (believe it or not, every once in a while a plain vanilla information seeker gets caught in our web)
- **comm team** (these OCLC staff are charged with communication as a primary objective)
- **OCLC managers**
- **OCLC board & councils**
- **OCLC corporate** (covers anyone at OCLC outside the OR organization)

Use Cases

There are 16 use cases below: (A) [project scope & status](#) (B) [announcements](#) (C) [events](#) (D) [publications](#) (E) [prototypes](#) (F) [software](#) (G) [about us](#) (H) [contributing news & announcements](#) (I) [contributing updates](#) (J) [workgroup collaboration space](#) (K) [partnership-only content](#) (L) [about the partnership](#) (M) [visiting scholar information](#) (N) [grant funding applications](#) (O) [kilgour award](#) (P) [people](#)

(A) project scope & status

(A1) library school faculty members seeks current status of OR project.

Aaron is a library school professor who read about OCLC's audience level data work in a JASIST report last year. As he prepared a class lecture touching on the topic he was curious to look at current audience level data files gathered by the project and decided to visit the OCLC Research web site to see if anything recent was available. He quickly found a link to the Audience Level Data Mining Project on the OR web site and was delighted to see that it included both links to more current audience level data files and contact information for the project lead, Lynn Connaway.



(A2) collection manager looking for deaccessioning guidance.

Ann manages the collection of a college library and is facing severe space constraints that will lead her to remove some items from her collection. She googles 'deaccessioning print backfiles' to see who else may be coping with this kind of challenge. The first hit on Google leads her to the OR web page for the 'Deaccessioning E-Journal Print Backfiles Working Group'. Since she does not really know anyone on the working group itself, she decides to contact the OCLC staffer for the group via email to see if they have made progress on their list of known archives. It would really help if she could get a copy of that!

(B) announcements

(B) faculty member adds news feed

Barry, a new junior faculty member at the University of British Columbia SLAIS, decides to assess his RSS feeds and realizes he doesn't have one from OCLC Research. He navigates to the main OCLC Webpage and finds the menu link to OCLC Research. Upon hovering over the link, he encounters the dropdown menu which offers a "News" link. Clicking on the "News" link takes him to a page containing recent news posts, plus links to subscribe to the OCLC Research News RSS feed, among other Research feeds.



(C) events

(C) director watches a webcast

Carly, director of City State Library, read in announcement posted to COSLA listserv about an upcoming OCLC Distinguished Seminar Series presentation with Richard Ovenden, which she was interested in attending remotely. However, she had a conflict at that time and was



not able to attend. She also read that the presentation would be recorded and made available on the OCLC Research Distinguished Seminar Series Web page shortly after the meeting, so she followed the link from the message to the OCLC Research Distinguished Seminar Series page and saw an option to subscribe to an OCLC Research RSS feed to receive notification about news and updates from OCLC Research. She subscribed to the feed. Several days later she received notification that the recorded webcast of Richard Ovenden's presentation was available, so she clicked the link and watched it online.

(D) publications

(D) archivist looking up an old article

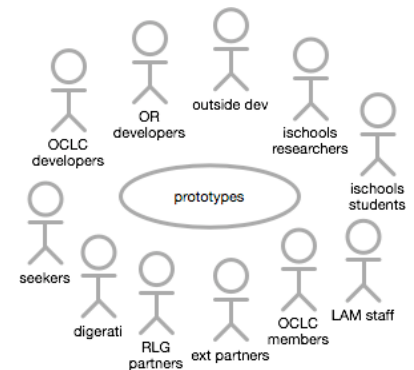
David, from the Deadwood Division of the South Dakota Department of Archives, is a long-time RLG supporter. He not only remembers a lot of the RLG work and publications, but he contributed to many of them. Today he's writing about the rate of change in the cost of digitization. He knows there was an RLG piece about ten years ago having to do with the costs of digitization. He remembers the article, but he can't quite place whether it was in the RLG News, the RLG Focus, RLG DigiNews -- or maybe it was a stand-alone report. He goes to the RLG website (www.rlg.org) and it automatically takes him to the OCLC Research page, which has a search box. He types in some words from the title and pulls it right up. It was exactly 10 years ago and it's perfect for his comparative study.



(E) prototypes

(E) library developer playing with prototypes

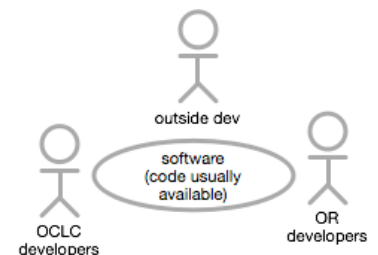
Elaine is a developer on the IT staff of a college library. Her department also supports the college archives which, like her office, is located in the main library facility. She recently attended a conference where she saw an OCLC Research prototype demonstrated, and learned that it and others were available from the OCLC Web site. On her way out of the presentation, she grabbed a brochure from a table in the back of the room. Referring to it, she navigated to the OCLC Research site and discovered ResearchWorks. She spent the better part of an afternoon surveying the range of work represented there, including interacting directly with a number of the prototypes, and following links to information about the larger projects that produced the prototypes. She followed links to presentations and publications, and began to envision how she might use one or two OCLC technologies, together with concepts described in one of the linked articles, to creatively address an issue she knew was problematic for one of her internal clients.



(F) software

(F) researcher looking for tools

Franklin, a researcher and computer scientist at Free Internet Solutions, is working with a team to develop the next generation of automatic web classification tools. In searching for prior work in this area, he reads a comment about Scorpion from OCLC Research. Searching Google for "oclc scorpion" he gets a hit that takes him directly

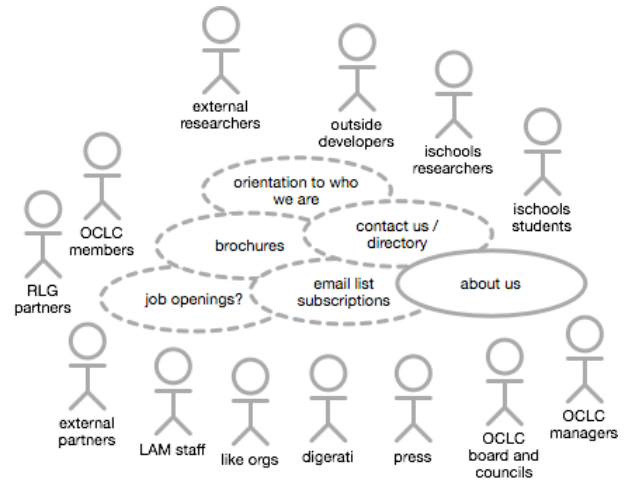


to the Scorpion download page, where he also finds links to documentation for the project and presentations related to the project.

(G) about us

(G) student finds a newsletter

Gina, a library school student at Great State, heard from a classmate that OCLC Research publishes a weekly newsletter that she might be interested in reading. She couldn't remember the name of the publication, so she Googled "OCLC newsletter" and was directed to an OCLC Web page that lists descriptions, subscription links and archives for each OCLC newsletter. Upon reviewing the descriptions of the available newsletters and reading a few of the archived versions, she decided it must be Above the Fold that her classmate was referring to, so she subscribed online and specified her preference to receive it weekly via RSS feed.



(H) contributing news & announcements

(H) communications team member spreads the word

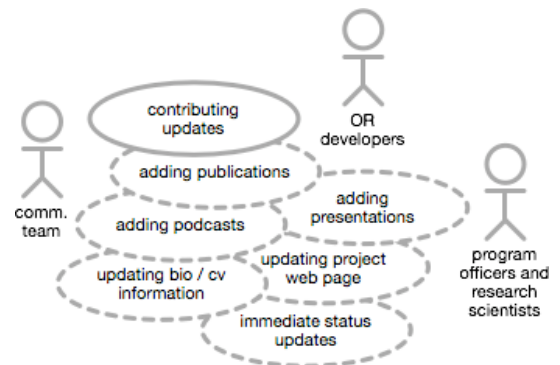
Holly, on the communications team in OCLC Research, just published a report about Research Information Management written by program officer, Ricky Erway, and would like to promote its availability to the RLG partnership as well as the general OCLC Research audience. She creates a news announcement in Collage using Contribution, then selects the feeds through which she wants to distribute the announcement. In this case, she chooses to distribute the announcement to both the RLG Partnership and OCLC Research news feeds. During this process, the announcement will automatically be posted on the OCLC Research homepage and news page. Holly will also include an announcement about the report in the Friday Edition, a weekly e-mail message sent via listserv to the RLG partnership, as well as include it as a "news and views" feature in the next issue of Above the Fold. She will also ask corporate marketing to include notice of the report in an upcoming issue of OCLC Abstracts.



(I) contributing updates

(I) research scientist creating a new bio

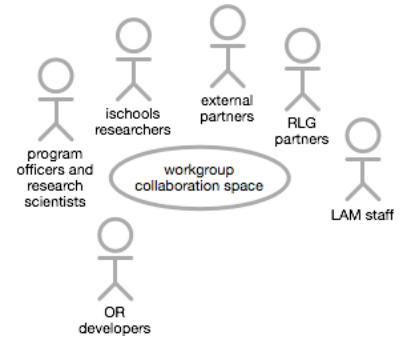
Isabel is a newly hired Research Scientist. She needs to get her bio page created and updated and create a page for her first new project. After examining the other scientists' and program officers' bio and project pages, she is able to describe what she wants to one of the communications folks. She then reviews her pages on the review site, and is able to make some comments on changes she would like before her new pages go live to the outside world.



(J) workgroup collaboration space

(J) working group member catching up on working group progress

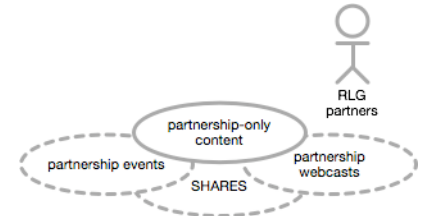
Janice, from Jacksonville Junior college, signed up for the RIM working group on Data Curation. She's been too busy to pay much attention to the progress of the group, but it's a quiet Friday afternoon, so she'd like to get caught up. However she can't find the email with a link to the information. She goes to the OCLC Research site, sees the list of programs, chooses RIM, and then sees her working group. A click on the "for working group members only" button takes her right to where all the shared documents and discussions are. It doesn't take long before she feels up-to-speed with the activities and ready to contribute.



(K) partnership-only content

(K) old hand looking for new policy

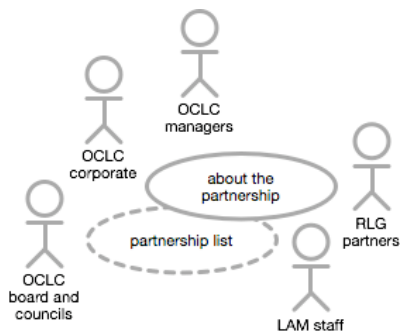
Karla, from Karthage Kollege, is an old hand in SHARES. She's been at it so long she can do interlibrary loan transactions with her eyes shut. She never even thinks about the web presence for the SHARES participants. Since some recent layoffs, however, Karthage has been getting more ILL requests than they can handle. She needs to make some changes to her ILL policy to deflect all incoming WCRS requests except those from SHARES members. She knows there's a place on the OCLC Research website just for SHARES members. When she goes to the SHARES page, she clicks on "for SHARES members only" and sees the array of options, one of which is the OCLC ILL Policies Directory. She goes in, makes the change, and sighs with relief.



(L) about the partnership

(L) product manager seeks RLG partners

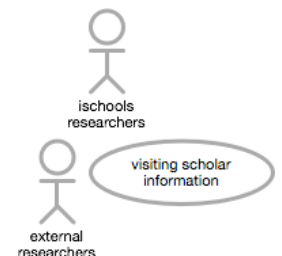
Larry, the OCLC product manager for Library Listings, would like to have some staff from academic libraries try out a new prototype and provide feedback for improving the service. He knows that program officers have good relationships with some academic libraries, but isn't sure which academic libraries are RLG partners. He'd like to be better informed before he asks one of the program officers to help put together an advisory group to help him as he launches his new service. He goes to the OCLC Research web site and types the word Partners in the search box. The list of institutions allows him to name the institutions he'd like to have represented on the advisory group. Now he's ready to ask for this assistance.



(M) visiting scholar information

(M) researcher checking out visiting scholarships

Montel is a Ph.D. researcher in the IT department of the national library of an Eastern European country. Due to the national government's generous terms of employment, Montel is eligible for a fully funded 6-month sabbatical next year. He begins to investigate opportunities to further his primary research interest in a location that could provide convenient access to useful resources unavailable to him at home. One of his initial activities is

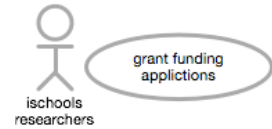


to use the major search engines to identify information organizations with formal positions for visiting researchers. Because of good cross-indexing in the metadata of the page, his search for "visiting researcher" returns the Visiting Scholars page on the OCLC Research Web site. He reviews the information there, and decides to submit an inquiry regarding the possibility of arranging a working visit.

(N) grant funding applications

(N) professor applies for grant

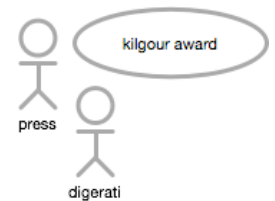
Noreen is an Assistant Professor at a SLIS with a Ph.D. program, and also a member of ALISE, the Association for Library and Information Science Education. She manages an active program of her own research, and is constantly looking for potential sources of funding, both to support her work, and also because it allows her to “buy out” teaching hours and enhance her status toward gaining tenure. Noreen subscribes to JESSE, an e-mail discussion group that promotes global discussion of LIS education issues, where she sees a notice about the OCLC/ALISE Library and Information Science Research Grant Program. She follows the link to read the formal call for proposals on the OCLC Research Web site, and decides to apply for the grant. Over the six months that she develops her proposal, she refers back to the call from a variety of Internet-connected devices. Sometimes she follows her bookmark for the site, but other times she uses one of the major search engines to find the page. She appreciates the fully automated submission process.



(O) kilgour award

(O) journalist seeks award recipient

Oskar is a journalist in an information-industry publication. He subscribes to OCLC Abstracts, a weekly e-mail newsletter, and notices a short entry about OCLC and LITA, the technology-focused subgroup of the American Library Association, announcing the next annual Kilgour Award winner. He realizes this information will be of interest to his audience, and decides to see if enough additional information is available about the award for him to develop an article of his own. He follows the link from Abstracts to the OCLC Research site to learn more about the award and this year's winner.



(P) people

(P) audience member follows up on conference presentation

Paul hears Patti of OCLC Research give a presentation at CNI. He was impressed with her perspective on the challenges libraries face and wanted to know more about her background, maybe even contact her. He got her card after the session and followed the link there to the OCLC Research site. The bio provided some of her library vendor background that helped explain some of the perspective he sensed, but it was the link to her article on the topic and her blog that really helped Paul understand where Patti was coming from. He sent an email proposing a collaboration later that afternoon.

