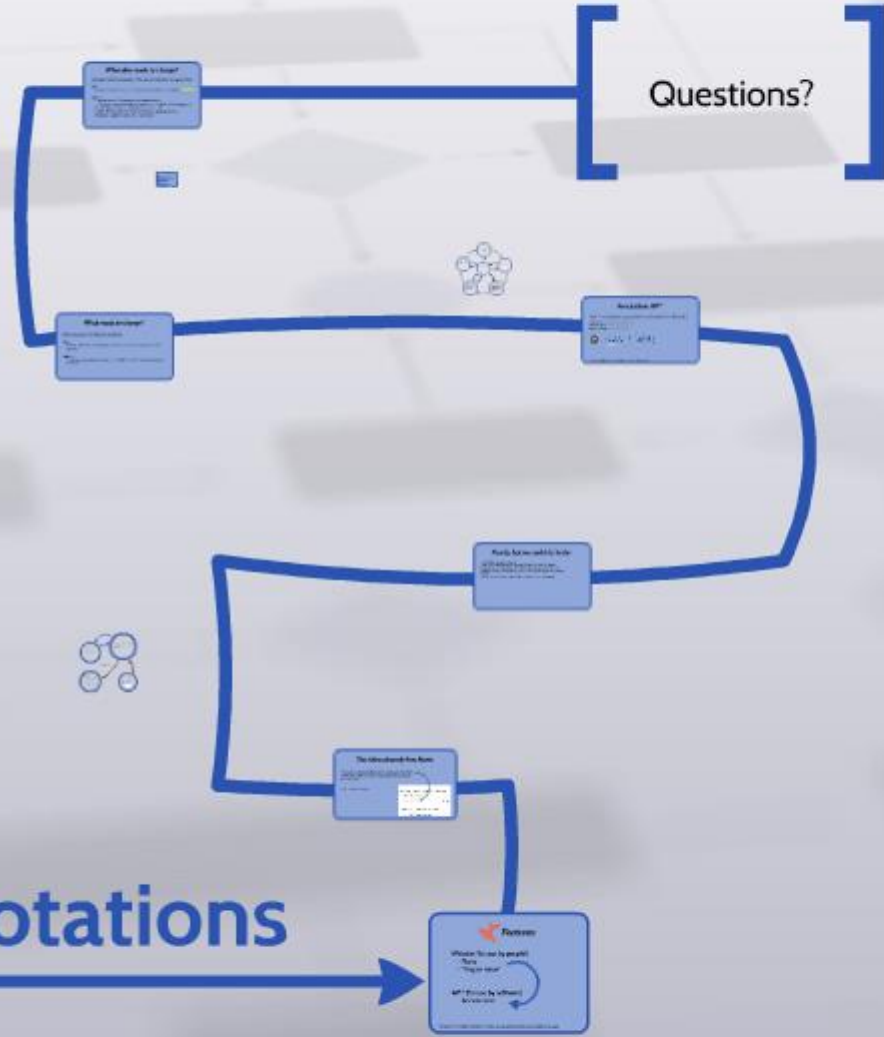




# Smarter Collections use Annotations

Ben Richardson





# *Features*

## **Website (for use by people)**

- Alerts
- "Flag an issue"

## **API\* (for use by software)**

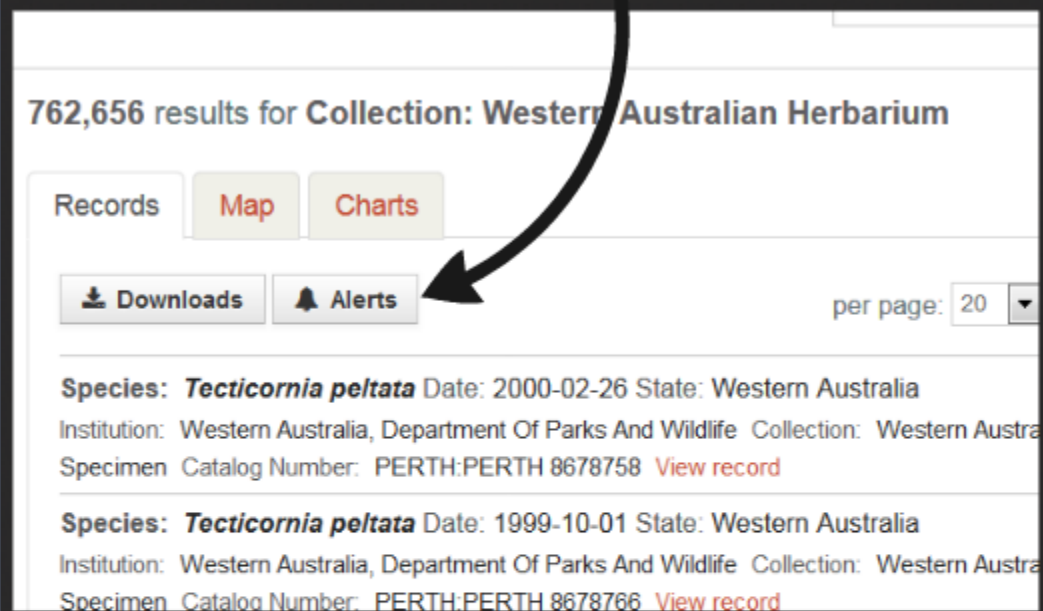
- Annotations



# *The Atlas already has Alerts*

Any user, including Collections Managers can already be notified of problems, they simply add an alert setup to their account

Let's see how it works



762,656 results for Collection: Western Australian Herbarium

Records **Map** Charts

Downloads Alerts per page: 20

**Species:** *Tecticornia peltata* Date: 2000-02-26 State: Western Australia  
Institution: Western Australia, Department Of Parks And Wildlife Collection: Western Australia  
Specimen Catalog Number: PERTH:PERTH 8678758 [View record](#)

**Species:** *Tecticornia peltata* Date: 1999-10-01 State: Western Australia  
Institution: Western Australia, Department Of Parks And Wildlife Collection: Western Australia  
Specimen Catalog Number: PERTH:PERTH 8678766 [View record](#)


The screenshot shows a search results page for the Western Australian Herbarium. At the top, it displays '762,656 results for Collection: Western Australian Herbarium'. Below this are navigation buttons for 'Records', 'Map', and 'Charts'. Further down are buttons for 'Downloads' and 'Alerts', with a bell icon next to 'Alerts'. A black arrow points from the text above to the 'Alerts' button. Below the buttons, there are two specimen records for the species *Tecticornia peltata*, each with its date, state, institution, collection, and specimen catalog number, along with a 'View record' link.




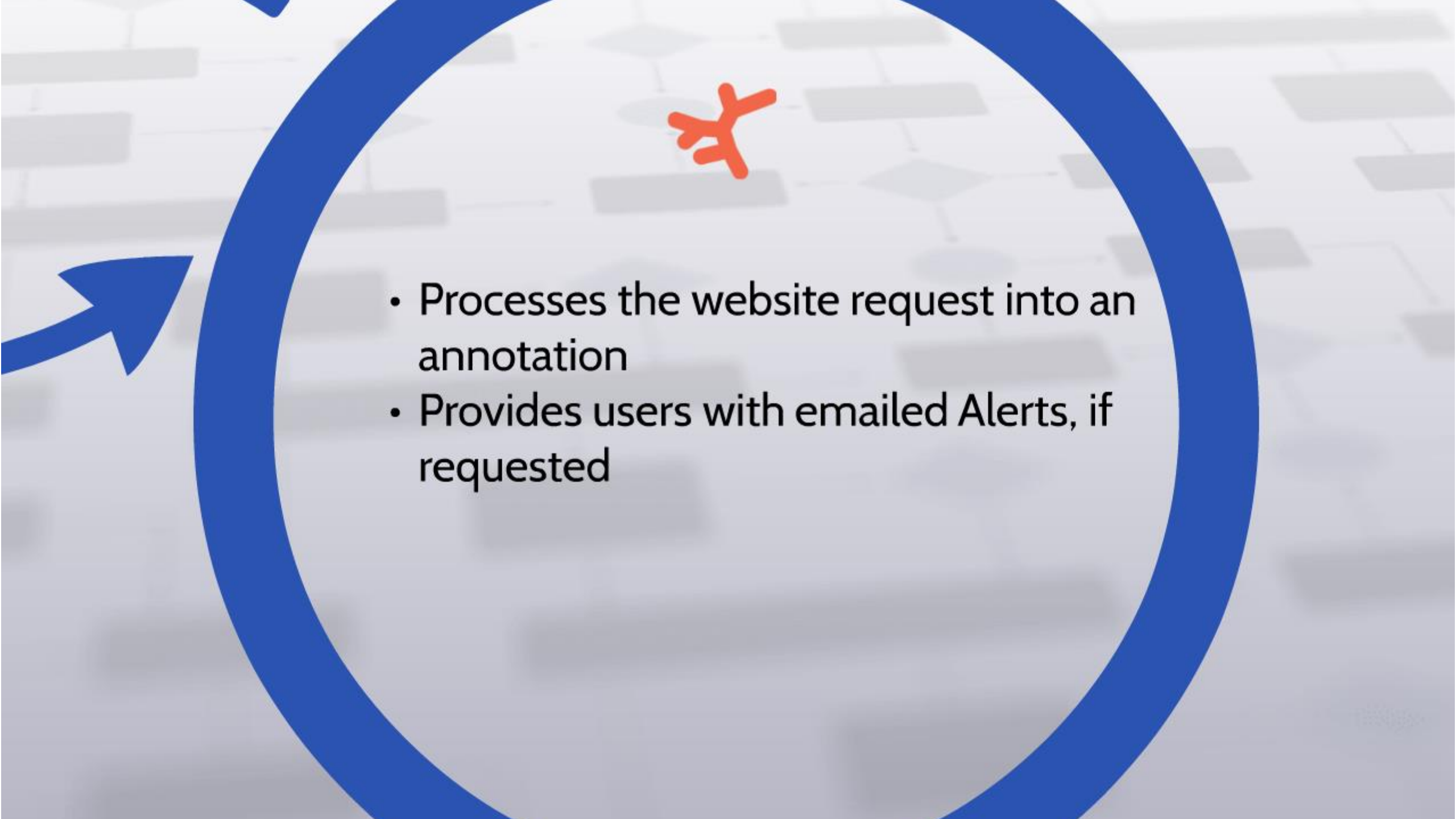


## *User*

- User reports an error with specimen in the Atlas
- Uses "Flag an issue" feature

 [View full data quality report](#)

 [Flag an issue](#)

- 
- Processes the website request into an annotation
  - Provides users with emailed Alerts, if requested

# ***Collections Manager***

- Receives Alert email
- Sends Alert to a specimen curator
- Specimen curator updates database (or not)

No clear path to reply to the annotation other than manually create another one? Or email the reporter directly?



# ***Data provision***

Updated specimen data is provided to the ALA through the usual channel for the collection



# *Handy, but we could do better*

- The notification process is by email
- A user must enable the notification process through their own ALA account
- The account has no indication that it is owned by an official partner of the ALA
- Resolving an issue requires switching between email client and specimen database software
- The outcome of the decision made by the collection is lost to the system

# *Annotations API\**

What if the collections management tools used the Annotations API directly?

- Axiell EMu [alm.axiell.com/solutions#emu](http://alm.axiell.com/solutions#emu)
- Collective Access [collectiveaccess.org](http://collectiveaccess.org)
- Specify Software [specifysoftware.org](http://specifysoftware.org)



\*A machine-readable interface to data, as opposed to a human-readable web page.





## *User*

- User reports error with specimen in the Atlas
- Uses "Flag an issue" feature

 [View full data quality report](#)

 Flag an issue



- Processes website requests into annotations
- Provides users with emailed Alerts, if requested

## ***Curatorial staff***

- Emailed alerts need only indicate that there is a problem to be solved
- Specimen database curator edits specimen record
- Collections software takes place of back-and-forwards between email and specimen database

# *Collections software*

- Makes API requests to receive matching annotations
- API requests use the collection's official account
- Presents these to the curator
- Curator makes specimen changes (or not) and adds annotations to reflect decision
- Software sends annotation changes back to ALA

Store locally?



- Processes website requests into annotations
- Provides users with emailed Alerts, if requested





- Processes website requests into annotations
- Provides users with emailed Alerts, if requested

**But this time, using the API:**

- Provides matching annotations on request
- Accepts annotation additions and changes

# Data provision

Updated specimen data is provided to the ALA through the usual channel for the collection

# ***Feedback***

- Indicate that the official account for the institution has dealt with the issue, and in what way
- Contacts person who flagged the issue (based on notification settings)

# *What needs to change?*

## Official ALA accounts for collections institutions

### Why?

- To identify the owner of a reply to an annotation as the *official provider of that specimen*

### Requires

- A way to authenticate a connection to ALA's API so that official accounts can be recognised

# *What else needs to change?*

**Add support for ALA's Annotations API to relevant Collections Management Tools**

Why?

- To allow a specimen and its annotations to be easily viewed together (*in context*)

Requires

- A way to search ALA's annotations by catalogNumber
  - To support collections without a reference to the ALA UUID for a specimen
- Funding support? At least for the open-sourced tools?
- A well-written specification for the feature, made publicly available
- Developer support; timely answers to questions

# *In context*

A specimen's annotations are presented beside the matching specimen

- Avoids switching between email and specimen database
- Easier to maintain task focus
- **Bonus:** no need to ask; annotations pop in when a specimen is displayed or edited

Specimen 1234	Annotations
