Possible Use Cases for Tags (rev 23 March 2018)

Use Case	Module	Proposed by	Local examples	Requirements / Concerns	Notes
Visual flag on the screen, alerting a user to something	All	Christie	Analytic, Do next, Person's name	If tags get long, then clutters or lengthens the display. Tags lose value if they are not visible on the screen. Tags are not comments or notes.	
Bibliographic Local Codes	Inventory / Reporting	U Chicago	ASER / ISER; YBPebooks; Analytics / Bound Withs	UChicago: *controlled vocabulary * ability to associate tags with a specific report	Christie (Chicago): Tags would work well for these uses.
Statistical Search Codes	Inventory / Reporting	U Chicago	ebooks; eserials; vidstream; audstream	UChicago: * controlled vocabulary * possibly accounted for in the material type field in the item record.	Christie (Chicago): Tags would work well for these uses.
Categories of expenses for e-resources as currently tracked in E-Resource Database	Acquisitions	U Chicago	Primary Subjects, Secondary Subjects, Types	UChicago: * available for advanced reporting * controlled vocabulary * need to have a high confidence in the application of the tags	
Quick lightweight workflow support	Inventory / Acq / Others?	Ann-Marie Simona	Needs review, Rush, Needs hinge repair, Needs new spine label, Remote storage candidate, Renew Jan2019, Person + work due date		Could help with workflow until we have a workflow engine. Also could be useful for marking in item records when doing shelving or shelfreading, to gather materials that all need the same category of preservation work or same next step without removing from the shelf. Christie (Chicago): would this duplicate or compliment functionality available in the Notes / Comments App?
Format categories	Inventory / Accq / Cat / Reporting	RM SIG	eBooks, eJournals, Books, Journals, Streaming video, Large print, Captioned, Spanish subtitles, etc.		In addition to, or instead of, relying on format codes in MARC/inventory records, order records, item records
eBook platforms, e.g. ProQuest, Oxford, EBSCO	Inventory / Reporting	RM SIG	Additional format categories		Instead of trying to track via bibliographic records. Might this be useful?
Cataloging Admin Metadata	Inventory / Cataloging / Reporting	Kristin Martin	OCLC Collection Manager, Uncataloged, Cataloging Complete, Needs Authority Work		
Subdivide a larger category into more granularity	Acq / Reporting / All?	RM SIG	History fund further subdivided by region. Type of funding (e.g. university funds) subdivided by subject		Per Kristin: I could see this allowing for bigger funds, but then using tags to differentiate at a more granular level without having to allocate at that level
Categorize documents within document repositories	Help	Kimie Ou-Yang	Tips & tricks, Sample file, Sample report, Overview, Script, Settings		See the Help UX in Discuss
Bring together things into categories when their existing vocabulary doesn't allow for it	Inventory / Acq / Cataloging / Reporting	Ann-Marie	Use tag Oxford to gather all things related to Oxford UP, regardless of how or where the name is represented in the record (Oxford UP, UPSO, Clarendon, etc.)		Gets around limitations of cataloging transcription fields
Accreditation categories	Inventory / Acq / Reporting	Ann-Marie	SACS, NLN (nursing), ABA (law)		Could be assigned regardless of why the item was acquired, and regardless of which funds were used
Statistical Codes	Users / Reporting	U Chicago	UChicago: student / staff	UChicago: * allow for multiple tags * allow for tag replacement (e.g., if tag x is added, then assigned tag y is removed) * allow for hierarchies between tags (e.g., primary affiliation and secondary affiliation) * allow for rules that prevent two or mor tags from being simultaneously applied (e.g., if tag x, then cannot add tag y)	Christie (Chicago): Tags would not negate the need for a dedicated or local custom field for this data.
Instructors / Course name & registrar number / Semester/quarter / item type	Reserves / Reporting	U Chicago Anya Arnold	Chem101, Spanish2E, Fred Smith, Spring 2018	UChicago: * need to know history of when a tag was applied in the past and when * controlled vocabulary * searchable * available to reports * advanced search for combination of tags * searchable with data from other apps * consistent data if need to back out after a more robust solution is available or for use in an external system * allow for relationships between tags (e.g., permanent tag vs temporary tag) * ability to generate all tags that are relevant (e.g., applied to a type of record if not qualified in some way)	Christie (Chicago): Tags would not negate the need for a dedicated or local custom field for this data.

Loan Rules	Circulation / Reporting	U Chicago		UChicago: *controlled vocabulary * referenceable by loan rules engine	Christie (Chicago): Tags would not negate the need for a dedicated or local custom field for this data.
Bibliographic Status	Inventory / Reporting	U Chicago	Cataloging Complete; Uncataloged; Mono-class Sep; etc.	UChicago: * must have at least one of a type of tag assigned * controlled vocabulary * allow for the reserve of tags for use with a specific type of record (e.g., can be applied to the instance record, but not the holdings or item records) * restrict so that only one tag from a list can be applied to a given record	Christie (Chicago): Tags would not negate the need for a dedicated or local custom field for this data.
Electronic Bookplates / Donor Codes	Inventory / Acq	U Chicago		UChicago: * controlled vocabulary * ability to specify that a tag is of a specific type * ability to export donor codes so that they can be indexed in our discover layer for use in searching and filtering * ability to map donor codes to strings used for disambiguation in selection and for display	Perhaps note the code in the item record in addition to, or instead of, the order record. Per Kristin: these may need a dedicated field, given their importance.Christie: the critical requirements for this suggestes that the tags app would not suffice as a short or long term solution. Custom fields might work, but Electronic bookplate is a proposed element for the Inventory item record.