

**Best Practices for Subject Access to Digital Collections
at the University of Oregon**
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These guidelines are intended to serve as a checklist for developing appropriate subject access to any type of digital collection at the University of Oregon.

- 1) Consider the target audience and its likely approach to the collection.
 - a) At the UO, the target audience will always be the campus community. Additionally, a specific discipline or outside user group may also be a primary target audience. As a state institution, we must also consider the K-12 audience, even if it is not the primary audience for the collection.
 - b) Interact with members of the target audience to learn how they view the items in the collection and what subject terms they are likely to use in searching.
 - c) Refine the terms and the approach to subject access based on user feedback.
- 2) Look at other similar collections to see how subject access has been handled
- 3) Review existing guidelines or standards relevant to the type of collection (image, textual, audio, discipline-specific)
 - a) Review standards periodically to incorporate changes.
 - b) Maintain an inventory of formats and standards consulted.
- 4) Even if free-text descriptions form part of the strategy for providing subject access, build a local controlled vocabulary, consulting existing thesauri and glossaries and documenting from where terms are taken.
- 5) Take a sample of possible indexing terms and search them in a select number of relevant thesauri to determine the best source of useful terms.
 - a) Develop sample terms through discussions with collection curators, by looking at some of the digital objects and developing descriptions, and by getting target audience input.
- 6) Use terms from existing thesauri or glossaries whenever practical
- 7) Incorporate multiple entry terms for a concept (cross references) into the controlled vocabulary.
 - a) Even when the software used doesn't support cross-references, build a tool or develop a mechanism locally to support multiple entry terms.
- 8) Consider accommodating broader, narrower, and related terms, either through the underlying vocabulary structure or through a search interface.
 - a) Make the relationships between terms explicit to the user, either through links to the source vocabularies or through local development of hierarchical structures.
- 9) Document all decisions and the thinking that led to them.
 - a) Make those decisions publicly available.
- 10) Augment and revise terms and approaches to subject access as needed, based on user feedback, indexers' proposals, and changing technology.
- 11) Develop a mechanism for formal user feedback.
- 12) Continue to look for tools to facilitate automated indexing.
- 13) Train human indexers in how to apply the terms to the digital objects in a specific collection.

- a) Provide them a context for the collection, including its history, subject matter and intended user groups