CWRC (Canadian Writing Research Collaboratory)
Strategic Planning Meeting Notes
January 8, 2010

Design Charette

Key Functionalities:

1. ACCESS TO EVERY TEXT (5 dots total, 2 next to "multimedia")
   - total access to everything, published materials and archival materials, across universities
   - federated selective searching (see point 5)
   - provide links between and primary and secondary materials, note referred materials
   - note metadata and provide links across texts, should include oral and multimedia materials (i.e. performance events)
   - oral/ multimedia: distinct functionality (possibility with GIS—GIS as a primary organizational structure), ability to add, digital story-telling, author's creative process, reader's process
   - the ability to add different perspectives
   - want ability to find all sources to searched subject and understanding nature of sources (primary and secondary) scholarly and amateurish (need to differentiate between them)
   - how do we create these objects: saving objects, how to catalogue them, make them accessible, who is responsible to maintain and conserve? (GIS function could work here, track the search subject)

2. CREATE ANTHOLOGIES, curate collections (2 dots)
   - appropriate copyright, permissions, payment, licensing, rights management in general
   - different views on same materials, may be algorithmic or humanly created
   - skins for different users
   - ability to change the interface based on user needs, multiple interfaces available
   - 4 categories to search with (place: of author or subject matter; language; genre; a few key words) -> list of authors ->bio note of author with photo, noting who has viewed the material or updating the entries, contributions
   - "wiki" –like bio-critical entries with author access
   - hyperlinked of tagged?
   - audio recordings
   - forums based on different user levels and interests
   - open door to different productions, languages (through key words?)

3. SOCIAL MAPPING, (better titled?: VISUALIZATIONS) (6 dots- 3 left on page, 3 stuck to the back of the previous page)
   - map who was where at a particular time
   - implies the system keeps track of user and primary authors (dates, places, names, terms, photographs)
   - ability to analyze the information, i.e. ability to analyze map

- related to standardized encoding and tag sets
- GIS tracking (received 1 dot)
- federated searching across the project, isolating a search
- bibliographic rigor, bibliographic database
- authority lists (person names, geographical names, organization names)
- noting recommendations (privacy issues),
- tracking recommendations, tracking people
- shift to object-oriented based reading and not link-based reading, shift from hypertext to object-oriented
- GIS tool: articulate relationship between stories and places (not a link based one), timeline tool as well
- shouldn't be taken somewhere else, but the object itself should be noted as complex; create models of reading
- visualizing editors: multiple versions, variants, revisions, time-lapse, ecological modeling
- visualization not just in sense of interface but perhaps also in the sense of multimedia?
- tracking mobility (back and forth from for ex: areas x and y)
- see also 2 dots [on] access to "Multimedia" -> digital storytelling, -> author's, -> reader's

4. VISUALIZATIONS (separate sheet, no dots, part of group work)
   - GIS tool
   - USERS (researchers, students, artists) } [arrow to next line]
   - STORIES PLACES } [arrow to next line]
   - articulate, multiply, relationships, anons, S/P } [arrow to next line]
   - SOCIAL MOVEMENTS, AUTHORS, READERS, INSTITUTIONS, PUBLICS
   - TIMELINE TOOL
   - e.g. Women's liberation movement
   - SOCIAL MOVEMENT } INSTITUTIONS/AUTHORS/READERS/PUBLICS }
   - VISUALIZING EDITIONS
   - MULTIPLE VERSIONS, VARIANTS, REVISIONS} — TIME-LAPSE, or- ECOLOGICAL MODELING (e.g. Ben Fry's and Stephanie Posavic's (or Posavec's) Origin Projects)
   - SUMMATION:
   - NEED TO SHIFT FROM LINK BASED READING TO OBJECT-ORIENTED READING-> SHIFT FROM HYPERTEXT TO OBJECT-ORIENTED PROGRAMMING

5. ENCODING (3 dots)
   - DTDs
   - standardization… at what level? We Want to be as inclusive as possible to allow certain archival materials (i.e. TEI, EAD), low barrier to entry to contribute materials (also related to VISUALIZATIONS etc.)
   - must decide what needs to be standardized, should not be too heavy early on
   - don't want to hinder creativity and cause people not to use it
   - an issue of interface
   - might be helpful to offer suggestions (problematic)

- minimal metadata is necessary, but should be hidden, then when it comes to data within the object people would like links and suggestions and more explicit knowledge of metadata
- "see also" lists to advise people on other terms—allow contributors tag the materials themselves
- crosswalks between schemas
- image-based problems of TEI
- meta-data about vs. meta-data embedded
- collaborative ontology
- ideal xml editor- create new docs and share them: user should create and share them easily
- worth to enforce standardization or not- should be flexible
- extensive metadata desirable, especially for visualization tools; small set of tags related to a particular xml schema (a default) available to all but should also be able to call an authority list to ensure consistency
- ability to create own tags and tag lists
- suggestions: ROMA, EXL Editor, Elan

6. FEDERATED SEARCHING (3 dots)
   - searching across the project, isolating a search
   - canadiana.org
   - Archives Canada
   - DCB
   - ability to narrow or expand searches, filter certain projects
   - federated within and outside CWRC, search outside databases
   - recommendation and filtering

7. COMMUNICATION TOOLS (2 dots)
   - researcher to researcher
   - expert/contributor to user
   - forum sections, researchers can talk to each other or others about their findings
   - instructive guides to humanities scholars (welcoming language, easy interface)
   - easy documentation
   - noting recommendations (privacy issues)
   - responses/ recommendations from users
   - need for explicit and easy-to-follow language

8. USER DIFFERENCES, TYPES OF USERS (2 dots)
   - credit
   - ability of users to change over time, privacy issues, sharing (or not) projects
   - needs of users are wide (very technical v. the very non-)
   - roles (i.e. authors, academics, readers, students, etc.)
   - sharing
   - social networking
   - ability to change the interface based on user needs, multiple interfaces available
   - clear, but graphics, no clutter, nothing overwhelming
   - visual oversight (less language)
   - built-in help function for how to navigate

- French and English, icons
- users are contribters (scholars: producing analysis, creators) and assessors (amatures)
- forum function to share interests and findings

9. TEXT READERS (1 dot)
- interface
- annotation
- comparison
- facsimile vs. transcription
- "get the views for reading"

10. SUPPORT TEAMS
- document flow
- project management

11. MULTILINGUAL (3 dots)
- essential all of CWRC must be bilingual, French-English interface
- not parallel texts but multilingual within a single text

12. LANGUAGE (including visual presentation)
- Meeting site for first encounter: clear and uncluttered; appealing: bright, inviting, makes me want to continue and confident I can
- Circle as opening portal: (illustration of 2D pie chart with one wedge larger than the rest, presumably to show mouse-over reaction)
- wedges that click and expand, i.e. to give language options and icons (i.e. various projects which are part of CWRC; also, HELP function!: Written Instruction -> concise! Intuitive navigation, different users bring different experience/background)
- then, double click to enter a specific wedge for user option (different portal for contributor options?)
- contributors- bloggers/ "amateur" scholars: a) "conventional" – providing analysis, or b) creative practitioners/artists
  - (attribution of work an issue for them):
- protocols & guidelines for users:
  - language of publication
  - "peer-review"
  - citation/ copyright
- should materials be translated? Should scholarly material have abstract in French if original in language
  - standard of translation
- forum function
  - share responses, etc
  - recommendations by use of site

13. OTHER
- supporting teams is essential
- concern for "document flow"

Final Word, Wrapping Up the Charette

1) **Heather**: nothing
2) **Stan**:

- history mechanisms, allow to undo commands
- error recovery
- logging system of records

3) **Janice**:
   - integrating amateurs
   - allow everyone to contribute
   - multimedia allowances
   - anthology remixes

4) **Pat**:
   - accessible to a large degree and diversity of users
   - log users
   - authority lists need clarification

5) **Isobel**
   - -   nothing to add

6) **Susan**
   - Ofer: people are doing research alone
   - issue of credit, individualism

7) **Jeff**:
   - re: collaboration on tags—back-end process to extrapolate how people using them
   - recommend how others should or could use the tags

8) **Eleni**:
   - tool requirements: what are good ones/ bad ones, how could they be changed

9) **(I don't know her name)**:
   - gap between preservers and users, must improve communication
   - clearer bridges to other libraries, archives, etc.
   - support integration

10) **Cecily**:
   - language, relationship between French and English is important
   - foundational unity (or option to only pick one…)

11) **Dean**:
   - federated model for data sets in ORCA should have an open API so other databases federate into it and use our info
   - ability to develop tools for add-ons i.e. to Firefox, stimulate creativity for tools even for intermediate users

12) **Mariana**:
   - re: default core tags should be implemented into multiple languages (at min. French)

13) **Marie:**
   - credit and peer review -> part of CWRC? Outside?
   - language

14) **Ann**:
   - interrelation of language, standard of translation, abstracts available in other   languages? Full translations? Part translations?

15) **Kathryn**:
   - non-CWRC projects with overlap, ability to create connections to projects already   in progress?

16) **Geoffrey**:
   - we cannot do it all!

Presentations

Dan Irvine
- Visualization tool developed by Ben Fry, programmer, developed intuitive tool for using visualizations.
- Visualization model based on Darwin's *Origin of Species*
- The models allow the user to visualize revisions to the six editions of Darwin's work.
- You can manipulate the speed of animated visualization.
- Visualizations of the processes of revisions are elegant an conceptually powerful. There are several models for visualizations of data, developed by different artists in collaboration with programmers. The user engages in producing both aesthetic objects and visualization models from the perspective of programming.
- One of the projects with which CWRC can be aligned is *Tile* from the U of Maryland. This project derived from *AXE*. Irvin showed *AXE* (there are no documentation or guides). You can use it to annotate images, texts, audio files, video. This tool was the basis for the *Tile* project. *AXE* allows to annotate one surface, *Tile* lets you linking multiple surfaces, for example six different editions of a literary work.
- Image-based annotation tools are currently single-surfaces annotation.
- Current challenge: annotating several layers of data.
- UVic Markup Tool Project. Web-based annotation, collaboration, real time, online environment.
- M Holmes perspective: desktop-based environment. You can upload to a web-based publication engine, but work is done using local computing processing.
- Eleni asked whether annotations produced in *AXE* and *Tile* can be accessed online, Irvin thinks there is no current online access.
- Advantages of customizable and simple annotation, as opposed to doing XML markup.

Isobel
- The Orlando Project: http://orlando.cambridge.org/
- Presented Orlando and the advantages of tagging in a literary project.
- Demonstrated search in Orlando from the People search entry point > search by place (Canada) > customized "limit by date" and "scope" sections to show how encoding of texts enables access to information on Canadian authors' life and writing in Orlando.
- Encoding allows the user to answer complex questions, example: creating a list of authors born in Canada from 1900.

Kathryn
- ACTS (Atlantic Canada Theatre Site): http://lib.unb.ca/Texts/Theatre/
- The site provides access to electronic performance calendars, when the user access the calendars' search engine, a narrative about what's included in the site is presented (no browsing functionality right now). Kathryn presented a search results sample.
- CTS is featured in the Canadian Association for Theatre Research's site, the platform in this site doesn't have the support to sustain this work already in electronic format.
- Another project from the University of Guelph's canadian theatre programs proposed to use the information in the theatre database and get more data into ACTS.

Geoffrey Rockwell
- ITST Mashing Texts / JiTR: http://www.porganized.com/files/JiTR/JiTR-April/SiteDesign/add-tool.html
- The project tries to figure out and prototype the needs for an environment, key users of the project. Users of CWRC, personas, scenarios. Example: editorial scenario: http://tada.mcmaster.ca/bin/viewauth//Main/MashTextsProjects
- The team created prototypes of ideal scenarios for research and creation of electronic texts. Developed a working prototype: JiTR.
- The user logs in, has a list of collections (the paradigm in JiTR is the list). Special status, notes coming in, reports (anthologies or reports). Items can be organized, metadata, 'versioning' (the system is saving the history of editions of the text). Tools that bring items into a collection.
- Susan noted that the collections features are very useful for researchers.
- JiTR launches an external tool: an XML editor that loads off the web. Instalation is not necessary. The XML editor has different options for viewing the materials. The point of JiTR is that it can mash different editors into the system: the editor / the software is independent of the document (JiTR launches the tool, and saves the user's work into an electronic archive (Fedora)).
- JiTR Model: Gathering, editing, analyzing > JiTR > Archive > Publication, Learning

Elleni
- Media wiki-based platform for building visualization tools. Access control. Bunch of name spaces.
- CWRC; many user stories. No cross-referencing. template for stories: ugly and utilitarian, but can be tweaked. Can track changes, compare them. Template is ours. Dean story lost. wiki asleep, woke up. EmIC story. **[isobel to mariana: I didn't understand this; you might ask Susan summary.]** shortcoming is that no-one has used the templates.
- They developed a model for showing who has made what changes. if you change 50% of sentences, the document switches its owner to belong not to the drafter but to the reviser.

Ofer
- One tool for collaboration, another, temporary name, FriendFishNet, to improve instant messaging. Suppose you work on many projects, each with many people. How to know others are working on same stuff right now?
- The tool shows who is working on something similar. n.b. privacy issues.

Pat Demers
- Women Writing and Reading in Canada from 1950: http://canwwrfrom1950.org/
- Database, all tabular: names, genres, chronologies, critical commentary, diagrams of reading practices from libraries (Halifax and ? as well as Edmonton), archives.
- The site provides open-source materials and a platform for feed-back from visitors within and beyond the academy.

Heather

- What would it be to represent a city? Edmonton to be her example. Non-historical. Representations in all media and multimedia.
- hitotoki.ats.ucla.edu (which started with Tokyo and took-in other cities).
- Descriptions of cultural artifacts, events and observations. You can add commentaries.
- Map to the right, pictures and captions to the left.
- hypercities.com, Heather showed the example of Berlin. Place fairly static, but you can layer maps on top of each other from 17c onwards, and make them more or less transparent (that is, see-through).

Stan
- Hans Rosling's talk in TED
  - http://www.ted.com/talks/hans_rosling_shows_the_best_stats_you_ve_ever_seen.html
  - Hans Rosling's visualization was created with the Gap Minder tool, an example of how visualizations can present information dynamically.
- Reader example - In Transition: Selected Poems by the Baroness Elsa von Freytag-Loringhovenr: http://www.lib.umd.edu/digital/transition/
  - Panel, versions, bibliography.
- Drama project. SET is a blocking tool for drama projects, the user can add blocks of text, create digital representations of a performance in progress, watch the play from different camera perspectives. SET also has a versioning machine.
- Susan: for CWRC it would be possible to build projects that are compatible with visualization tools, or blocking tools in the case of drama. CWRC to provide both experimental services and priority services.

Jeanne
- Non-fiction writers who could be uploaded into CWRC, left out of periodical publications, creative non-fiction, lots of interesting women writers, in terms of genre, having a visualization of genre production in history would be very interesitn. Trying to find a space for a map, visualization and how it maps to government funding, changes in the law, charting all that information.
- Susan: CWRC recording and charting the impact of material historical aspects.
- 1970 magazines example, there is no bibliography on those materials

Susan
- principles for developing Orlando: start simple; leverage tagging to refine searches
- start with a simple search, narrow via the interface
- Search prototype for Orlando: the user starts with a googlesque search, and use tagging for refining results
- Visual browser prototype - Mandala - example: visualizing Victorian novels, poetry, and drama
- Eleni's visualization prototype: social network visualization of poetesses in Orlando
- Visualizations allow you to get to the second order of associations that are not evident at first sight.

Carol
- SFU library

- Worked on tracking early women writers, and created a bibliographical database that contains both writing information, biographical information entered in a number of searchable fields
- The information was collected during the 80s, using catalogable items.
- This database is one of the existing projects that can seed ORCA with already available research in electronic format on Canadian writing

Ann
- PACT (Professional Association of Canadian Theatres)
- University of Guelph - Canadian Theatre
- Canadian women playwrights
- Biographical information
- Research questions included who should be included as playwright?, or as Canadian playwright?, aspects of performativity.
- Scope: defined what is considered Canadian for the purposes of the project
    - Performance calendars, model for performance calendars.
    - Professional vs. amateur - answering the question of what constitutes a playwright.
    - Relationships of people involved in clearly defined activities of organizations (guilds, associations).