

# Dictionary of Access and Usage Terminology

## A component of the ACAP Technical Framework

*Implementation Version 1.1, 25 September 2009*

This dictionary defines the terminology required to communicate access and usage policies that are contained within the use cases currently supported by the ACAP Technical Framework. Other terminology will be added as required by additional use cases at later stages of ACAP development.

Six basic usage verbs are defined: crawl, follow, index, preserve, present, other. Each is specified in tabular form, with additional notes, in sections 1 to 6 below. Section 7 is a glossary of terms used. The first appearance of each term defined in the glossary is shown in blue.

Under each usage verb is indicated what qualifiers can be specified for the used resource or the usage itself. Qualifier values that have been tested in Pilot use cases are highlighted thus. Some other qualifiers and qualifier values are also included, but these should not be regarded as exhaustive.

*Changes compared to previous version:*

### 1. Crawl

Usage	Crawl
Definition	Retrieve a <a href="#">content item</a> for processing in accordance with other permissions and prohibitions.
User	<a href="#">Crawler</a>
Used Resource	Content item
Used Resource Qualifiers	None

Usage	Crawl
Output Resource	<a href="#">Content item retrieved copy</a> (also referred to as “crawled resource”)
Usage Qualifiers	None
Dependencies	None
Notes	None

## 2. Follow

Usage	Follow
Definition	Follow links contained in a content item, except where explicitly prohibited at a more detailed level.
User	Crawler
Used Resource	Content item retrieved copy
Used Resource Qualifiers	None
Usage Qualifiers	None
Dependencies	“Crawl” must be permitted.
Note	A prohibition on “follow” is not to be interpreted as prohibiting any other use of links, eg in page ranking.

## 3. Index

Usage	Index
Definition	Derive and store <a href="#">content item index entries</a> in accordance with a service operator’s indexing practices
User	<a href="#">Process</a>
Used Resource	Content item retrieved copy, or <a href="#">Publisher content item indexing resource</a>
Used Resource Qualifier (1)	Content property list
Used Resource Qualifier (2)	Location (to prevent indexing of unauthorised copies) - index if found at: <a href="#">URI of authorised location</a> Repeatable if there is more than one authorised location (eg a mirror site).
Used Resource Qualifier (3)	Must use specified indexable content (if Used Resource is <a href="#">Publisher content item indexing resource</a> ): <a href="#">URI of indexable content</a>
Output Resource	Content item index entries
Usage Purpose	<a href="#">Service</a>
Usage Qualifier	Time period: <a href="#">until recrawled</a> <a href="#">permanently</a> (eg for national library web archive) <a href="#">until date</a> for a specified period from a specified event
Dependencies	“Crawl” must be permitted.
Note (1)	If “index” is allowed for a specified page, it is to be interpreted as applying to the whole of the page, including links that are visible in the page but that are subject to a “no-follow” prohibition.

<b>Usage</b>	<b>Index</b>
Note (2)	Permission to “index” does not imply permission to extract indexed content for “data mining” applications, which are not covered within the pilot set of usages.

4. Preserve

Usage	Preserve
Definition	Store a copy of a content item, preserving as far as possible to arrangement and style of presentation of the original
User	Process
Used Resource	Content item retrieved copy
Used Resource Qualifier (1)	Content property
Used Resource Qualifier (2)	Location (to prevent storage of unauthorised copies) - preserve if found at: <a href="#">URI of authorised location</a> Repeatable if there is more than one authorised location (eg a mirror site).
Output Resource	Content item preserved copy
Usage Purpose	Service
Usage Qualifier	Time period: <a href="#">until recrawled</a> permanently (eg for national library web archive) <a href="#">until date</a> for a specified period from a specified event
Dependencies	“Crawl” must be permitted.
Note (1)	The word “preserve” has been chosen in preference to “cache” or “archive”, both of which are currently used by some search engines in ways that are not necessarily consistent, and in preference to “store”, which is seen as too vague to be applicable.
Note (2)	Storage of index entries does not constitute the preservation of a copy, even if index entries could be used to re-create a version of the original content item.
Note (3)	If permission to preserve is denied, the content item retrieved copy is required to be discarded after indexing. For current search engines, this may mean that a “no-preserve” item will not be included in applicable service(s), since many search engines preserve the content item even when its use for display (“present”) is prohibited. The option to specify “no-preserve” is retained, however, since for some publishers and some types of material it may become meaningful in future.

5. Present

Usage	Present
Definition	Present as part of a service delivered to a browser
User	Process
Used Resource	Content item (ie the original content item on the publisher's website) <i>and/or</i> Content item preserved copy <i>and/or</i> Content item extract <i>and/or</i> Content item snippet <i>and/or</i> Content item thumbnail <i>and/or</i> Publisher content item summary <i>and/or</i> Content item link Any of the above If a set of permissions includes more than one Used Resource for a Present usage, this is to be taken to indicate than the permitted types may be used singly or in combination.
Used Resource Qualifier (1)	Content property
Used Resource Qualifier (2)	Location (to prevent use of unauthorised copies) - present if found at: <b>URI of authorised location</b> Repeatable if there is more than one authorised location (eg a mirror site).
Used Resource Qualifier (3)	Maximum length (of snippet or extract): number of characters number of words
Used Resource Qualifier (4)	Content item retrieved copy version: current (i.e. copy of most recent retrieved version) old (i.e. copy of any other version)
Used Resource Qualifier (5)	Must use specified resource as source for generating the used resource (if Used Resource is Content item snippet or Content item thumbnail): <b>URI of content for presentation</b>
Usage Purpose	Service
Usage Qualifier (1)	Modification applied to content item: none format (i.e. data format) style (typographic / layout) appearance (for text synonymous with 'style'; for images a portmanteau term covering, for example, colour and resolution) translation annotation (e.g. rating symbols, tags) content embedded metadata structure (logical or physical)
Usage Qualifier (2)	Must include specified content: <b>URI of resource, with resource type</b> (to include "credit", "link", "icon", "text")

Usage	Present
Usage Qualifier (3)	Context of presentation: embedded in user-generated content embedded in original content
Usage Qualifier (4)	Time period: until recrawled permanently (eg for national library web archive) to date from date from date to date for a specified period from a specified event
Usage Qualifier (5)	Target user condition: permitted location (IP address list, IP range list, domain list, country list) prohibited location (IP address list, IP range list, domain list, country list)
Dependencies	“Crawl” and “Index” must be permitted. “Store” must be permitted for any Used Resource other than the original content item on the publisher’s website, or a link to the original item.
Note (1)	The word “present” has been chosen in preference to “display” or other possible alternatives because it is more suitable when the resource involves audio or other material that is not exclusively visual.
Note (2)	Highlighting of matched search terms in the display of a content item is specifically not regarded as constituting “modification” of the content or format.

6. Other

Usage	Other
Definition	Any usage not expressly permitted
User	Any
Used Resource	Any retrieved and/or derived content
Used Resource Qualifiers	None
Usage Qualifier (1)	Terms under which other usages are permitted: URI of terms and conditions URI
Note	An “Other” usage type is included in order to make an explicit statement that “any usage not expressly permitted is prohibited”, unless the usages is qualified to indicate that other usages may be permitted under certain terms for which a reference link is provided. The corollary of including such a statement is that it must be possible to express all permitted usages fully and exactly.

## 7. Glossary

Content item	A piece of content on a publisher's website, at any level of granularity which it is possible to reference in an ACAP permission statement.
Content item index entries	The <a href="#">index entries</a> (see below) required to make a content item searchable in accordance with a service's indexing practices.
Content item link	A link to a content item on the publisher's website.
Content item retrieved copy	A copy of a content item that has been retrieved by a crawler for processing. NB a retrieved copy may or may not be stored after it has been processed.
Content item snippet	A short indication of the content of a content item and, where applicable, its relevance to an end user search, generated by one or more process steps from a content item or some other resource specified by the publisher, possibly involving storage of intermediate derivatives, using proprietary algorithms. Although in practice snippets are almost always text, in principle a snippet doesn't have to be text, if the content item is a non-text item and there is an algorithm for generating snippets from such items.
Content item preserved copy	A copy of a content item that is preserved for use in a service.
Content item extract	An extract taken <i>verbatim</i> from the preserved copy of a content item. The order of content in an extract may not be modified.
Content item thumbnail	A thumbnail image of a content item webpage, either generated by a service from content item preserved copy or supplied by the publisher.
Content property	A property of a content item, encoded as part of the item or in associated metadata.
Crawler	Software controlled by a service operator that systematically retrieves content items from the web.
Index entry	An entry in an index that comprises (a) a look-up string derived from a content item retrieved copy, (b) a link to the content item, and (c) optionally, positional information to be used only for the purpose of increasing the effectiveness of searching and relevance assessment, eg by enabling the proximity of words in text to be taken into account.
Process	Any process that is operated by or for the operator of a crawler.
Publisher	A person or organisation that places content on the web.
Publisher content item indexing resource	A resource from which content item index entries must be generated, either based upon a content item extract or supplied by its publisher.
Publisher content item summary	A descriptive summary of a content item supplied by its publisher.
Service	A service, including a search service, that provides organised access to content that has been harvested from the web.
Usage purpose	A service or set of processes or category of the same to which a set of permissions or prohibitions apply and to which an identifier or controlled name has been assigned.