## **ODSAS User Handbook**

http://www.odsas.net

**Online Digitial Sources and Annotation System** 

### Handbook for Software Version 3.6 Public Release Version

Author and Programmer

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## **1** Introduction

### 1.1 What is ODSAS?

ODSAS (Online Digital Sources and Annotation System) is a multipurpose serverbased IT platform for digital archiving, annotation and collaboration for the social sciences and humanities and beyond. In particular:

- it is an archival engine of documents of various types (images, movies, sounds) organized in dynamic collections and sets.
- it is a multiuser work environment that allows researchers to manipulate, transform, edit, annotate, describe, transcribe, extract, search, recombine and link documents in an individual or collaborative way.
- it translates researchers' documents and work into interoperable formats, such as Dublin Core and RDF, and provides a OAI-PMH harvesting interface.
- it allows for fine graded management of particular rights on documents, providing a secure but scientifically productive means to exchange information while remaining within national and international laws of copyrights, cultural rights and intellectual property rights.
- > It is a living archive for research and by research.
- It is a system based on a strict separation between data, configuration and software. Data is therefore reusable.
- > It is compliant with ISO standards and interoperability standards.
- It uses state of the art open source software packages as engines.
- > It is free, but copyright restrictions apply.
- It is installable on any Linux platform that runs latest software packages.

### 1.2 What ODSAS is not

While ODSAS allows you to also manage your digitization procedures and to manage your backup process (see section 7), ODSAS is not intended for perennial archiving. You do need to think about the following issues in addition to working on and with ODSAS:

- ODSAS works with low to middle resolution images and files (average 1MB of image file size). You need to back up to another place your high-resolution files. ODSAS helps you to register and index these backups, but you need to actually do it.
- ODSAS cannot prevent catastrophes! You do need to make backups of all your files, high and low-resolution, to another place, building, city or even country.
- ODSAS prepares XML backups of the metadata and all the information contributors are adding to the platform, but it is your responsibility to back these files up in a secure and confidential place.
- ODSAS will not convert your original files into new standards if these evolve. For example, if your original high-resolution files are in the TIFF format, and the TIFF format changes, then you do need to upgrade all your backup files to this new standard.
- As per version 3, I do not believe ODSAS to be a very good tool for archiving and working on sound and movie files, even though it does already offer interesting features (see 8.3). Hopefully this will improve with time. But do not expect to find in ODSAS an Elan-like annotation tool for sound recordings.

### 1.3 Current Software Status

ODSAS software is written in PHP and javascript. The data is stored in a MySQL database and mirrored into XML files. ODSAS heavily relies on the Ajax Prototype Framework.

ODSAS is a highly evolving platform, because new modules and features are written whenever interesting needs are expressed by registered users. Features and content of the platform as well as of this handbook may change without notice. Please regularly check back if a new version of the handbook is available.

Current software status is version 3. Originally planned features have all been implemented and a public distribution is available. **Note** that testing is only undertaken on Safari, Chrome and Firefox, since other browsers have all shown to have major bugs that diminish the usability of ODSAS. We highly recommend downloading the latest version of these browsers.

The software is developed on NetBeans 7.4 (<u>www.netbeans.org</u>) on MacOSX.

### 1.4 What's new in version 3

Version 3 has a number of improved and new features. A short list of some of these features:

- Possibility to bookmark objects.
- Create a showroom of a selection of objects.
- New and improved metadata information for sets, in particular ISO language list and ISO country list.
- Standardized object typology.
- Harvesting of objects with Zotero now fully supported.
- Improved transcription interface.
- Automatized OCR (Optical Character Recognition) for printed material via Tesseract.
- Improved linking of sets and linking of objects interface.
- New interactive object ranking/sorting procedure.
- New user types including extended rights for Collection Managers.
- Upload of additional files to sets now available to collection owners.
- Close to 90% bi-lingual interface (French, English).
- Profile, password and login management.
- Convert multipage PDF files into image objects.
- Audio and video are now served in HTML 5 compatible formats and embedding.

#### Additionally, for administrators, the following functions are now available:

- New and improved digitization and backup management.
- Error logging of missing and corrupt files.
- Fulltext indexing management, typology management.
- Database coherence check.
- ODSAS XML schema and interoperability between distributed ODSAS systems.
- Physical directory creation and organization automatized via collection and set creation functions.
- Improved OAI-PMH server.
- Delete collections and sets and all objects and information related to them.

- Migrate a set from a collection to a new collection
- ... and many other more or less visible improvements

### 1.5 TODO List

The following features are currently being developed or tested. They are part of ODSAS version 3 but have not yet been fully implemented or activated. They will be soon.

- Upload PDF files that are automatically split into individual image files and inserted as objects of a new or existing set. As per 5 December 2014, this feature has been added. See section 5.3.1.
- EAD (Encoded Archival Description) export and interface.
- Mutual harvesting of global meta between distributed platforms (currently, only one-way harvesting is activated).

The following should be planned soon:

- Implementation of OLAC standard.
- ODSAS version 2 came with an independent single-user application that ran on Windows, Mac OSX and Linux to work on a PC, disconnected from the network, on one's collections and objects. Whenever this PC was connected to the web, the user could synchronize the work he/she had done with the server version of the data. – This synchronization service has been interrupted as for version 3 because the data schema has evolved. A new version of this single-user application will be developed within the coming months.

## 2 Meaning of collections, sets, objects and users

#### Definitions:

- An object (alias "file" or "document") is an individual file stored on the platform. Each file can be individually accessed, manipulated, edited or annotated. Every page of a book is an individual file or object. Every photograph is an individual file or object etc. In this handbook, the words "document", "file" or "object" are synonyms.
- A set is a number of individual objects that belong together and that are (ideally) of the same nature. For example, all photographs from one fieldtrip or on one topic; all pages of one book; all leaflets of one field notebook etc. You do usually not embed within one and the same set objects of a different nature, such as photographs and movies. They usually belong into different sets.
- A **collection** is a number of sets that belong logically, scientifically, historically or otherwise together. For example, all dictionaries on South-East Asia, or all of a researcher's files on a particular project, including a set for photographs, a set for field notes, a set for films etc.

The decision on which sets belongs to the same collection and on which objects should constitute together a set should be the result of discussions between the administrators of the platform and the depositing researcher or institution. It should simultaneously reflect the objectives of the researcher as well as archival coherence for future generations. Objects that can be of granted open access should be distinguished from objects that are of restricted access, and placed into different sets.

Thus, each **object** belongs to a **set**, each **set** belongs to a **collection**, and each **collection** belongs to one or several **owners**.

Owners keep the legal and moral responsibility on the material they deposit. It is for them to decide which objects should be publically available and which should not. Owners should make sure they are able to nominate another person that can take these decisions in case of their incapacity to do so.



### 2.1 Common icons

The following icons are images or buttons you will regularly encounter on ODSAS. The table below describes their general meaning.

🖊 or 🖊	Edit some field, information, feature
<b>P</b>	Save the information or feature you have entered
🗙 or 面	Delete a field, information or feature
	Table of contents, lists
💵 or 👤	Users, people, their rights etc.
4	Add an element (a user, a set, an object etc.)
<b>()</b>	Enter or see coordinates or a map
3	See content, sometimes also see to edit content
n miz	Reorder objects
P	Link objects or sets
к	Expand a list of features, objects, sets
	Unexpand or retract a list of features, objects, sets
<b>U</b>	Add an object to your favourites
*	Add an object to your showroom
22 12 28 15	Change interface language to English
	Changer interface language to French
	See / hide transcription text on top of image
-	Import something (meta data files, for example)

### 2.2 User types

There are several user types in ODSAS, and each user type can have several users.

- 1. *Administrators*. Administrators have access to all functions available on the platform. They can create users, attribute rights, create collections and sets, configure typologies, check and manage the database etc. Administrators have all the rights other user types have. In general, there are only one or two administrators per installation. The responsibility is close to that of a "subsystem administrator". Ideally the administrator has also root access to the machine.
- 2. General Collections Managers, called here GCM. Collection managers supervise collections, their metadata and files, the owners and users of collections. They should be allowed to have an ftp or sftp account to bulk upload files to the ODSAS media directory. They can create users, collections and sets. A collection manager has access to all collections. There should be at least one collection manager. The responsibility is close to that of a "chief librarian".
- 3. **Owners**. People who own particular collections. They are allowed to provide new users with particular rights on the collections they own. They can create new sets and upload files within the collections they own. They can annotate, transcribe, order and otherwise work on the objects of their collections. They have the responsibility to decide if a set should be public or of restricted access. They decide on the copyright notice associated to the objects.
- 4. **Contributors**. These are people who have particular rights on particular sets or collections. These rights can be defined by owners or GCM. They cannot upload files or create sets, but, depending on what rights they are provided, they can transcribe, edit, and annotate objects.
- Anonymous users. An anonymous user can browse all collections that are of open access. He or she can manipulate certain objects, but is not able to store these manipulations for later uses. The anonymous user is not allowed to annotate, transcribe or link objects, for example.
- 6. **Deactivated users**. Administrators and GCM can delete user accounts. Note that user accounts are not really deleted, but are deactivated. Deactivated accounts can be reactivated at any time.

#### 2.2.1 Create user accounts

Users accounts are created in 3 ways:

- 1) During installation, an administrator user account is automatically created.
- 2) Administrators and GCM can create new users in the administration interface (see 4.1).
- 3) If a collection owner has decided to allow anonymous users to ask for an access to a collection, a temporary user is automatically created. Owners are then allowed to validate the permanent creation of this new user. Administrators and GCM are allowed to change the status of this user or deactivate it.

#### Important notes:

- Passwords are highly encrypted. It is impossible to decrypt a password from the database. If a user forgets his or her password, he or she needs to create a new one. In the log in page, a user who needs to rest the password can click the link **Recover my password**. He or she will receive an email with instructions.
- Passwords are case sensitive. They need to be at last 6 characters long and include alphabetical and numeric characters.
- Never give your passwords away, and do not send them over mail or write them on your desk or so. ALSO NOTE: when you are logged into ODSAS, you will remain logged as long as you have not logged out or exited/quit your browser. Do not leave your computer open and logged into ODSAS while you go for lunch break !!

## **3 Overviews**

The below overviews are those you can see once you have logged in. If you haven't, go to the platform, and clock "Log in" under the Account menu.

Depending on your rights and user type, the menus and available functions change. The below screenshots assume you have all rights.

### 3.1 Homepage overview



### 3.2 Collection management overview



### 3.3 Set management overview



### 3.4 Object browsing overview



### 3.5 Overview of the "My space" menu

The *My Space* menu is accessible only if you have an account on the platform. Depending on your status and your rights, different items will be available to you. The list below assumes you have all possible rights as an Owner.

My profile	Set your personal details, change your password, accept new users to ask for access to your collections, add a CV.		
My database usage	Some statistics on what you have done on the platform.		
Direct access to sets	The list of sets to which you have access as registered user or owner for fast access and browsing.		
List my annotations	List, edit or delete your annotations to objects		
Manage my collections	If you own collections, this is where you edit them, as well as the sets that are in these collections (see sections 6 and 7)		
Manage my showroom	Create and edit your public showroom (see section 10)		
Accept/reject users	If you have allowed new users to be created in your collections, then this is where you accept or reject them. Note however that accepting a user does not automatically give him any rights. He or she is just a registered user. If you want to give that user access to your sets with specific rights, you need to do so specifically (see 4.4).		
Log out	Another way to log out from the platform.		

### 3.6 Overview of the "Administration" menu

The *Administration* menu is accessible only if you have an account on the platform, and if your user type is *Administrator* or *GCM*. Depending on your status and your rights, different items will be available to you. The list below assumes you have all possible rights as an Administrator (or, for some functions, as a GCM).

- DigitizationA number of tools that allows you to manage the<br/>workflow of digitization and backup jobs. It includes<br/>automatized reminders on the age of backup discs and<br/>the necessity to renew the backup (see section 7).
- **Collection management** Management of collections and their sets (see sections 5 and 6)
- Add a new collection Create a new collection (see 5.1). Owners cannot create their own collections (they can only create sets within collections). Administrators and GCM need to create collections for actual or future owners.
- File error management Lists errors encountered when users were browsing. In particular lists missing or corrupt files that need to be replaced. Check the list to see why certain files are declared missing or corrupt, upload again the missing file and click the fixed link. You can also completely empty the error log by clicking the Reset error log button. It will restart logging automatically whenever new (or old) errors appear.
- *User management* Allows to view, create, edit and deactivate users, as well as change their type (see section 4).

*Login history* Displays user login histories.

**Object typology** Objects types are those reflected in the navigation section of the homepage. They can be "manuscripts", "books", "photographs" etc. Every set must have an object type.

This function allows to edit your internal object typology and establish equivalence rules between your typology and Zotero as well as CSL typologies.

If you edit a typology (click the **pencil**), make sure your type reflects an equivalent or close type to Zotero and

CSL.

Click the **New Type** button to create a new object type, and choose the generic types that are reflected in Zotero and CSL. Several ODSAS types can have the same Zotero type.

Author typology Allows to list, edit and delete authors of sets, finds authors that have not set associated and sets that have no authors. Shows for duplicate entries.

- *Meta data of sets* A general overview of the metadata used in sets. Allows to quickly see which sets do not have sufficient metadata informed. Click the set link to edit these meta.
- *XML export* Updates the OAI-PMH server and backups the database to XML files using the ODSAS schema (see section 14). Whenever you have added new sets, I recommend triggering the OAI-PMH update.
- **Database fulltext update** Updates the fulltext engine of the database for better search results (to be used rarely, if ever). Normally, every user action will be reflected in the fulltext engine automatically. If at some stage you think cleaning up this engine is useful, use this function. Note that this function will run for a long time. Do not interrupt the process, otherwise the search engine index will be incomplete. If for whatever reason the process is interrupted, start over again.
- **Database coherence** Checks basic coherence of the database and tries to fix things, or at least tell you what may be wrong or missing and tell you what kind of action you need to undertake.
- Website settingsThis is where as administrator you can set some basic<br/>features of the platform, such as banner image,<br/>background colour, email of admin, homepage text etc.<br/>The interface is self-explanatory. There is no chapter<br/>dedicated to this feature in this handbook.

## 4 User management

Users are generally managed through the Administration  $\rightarrow$  User management interface by the administrators or GCM. However, if an owner has opened the possibility for new users to be created through his collections, then they may also be automatically created through the public platform.

In both cases, whether you create a user through the administration interface or whether a user has created his account himself, you do need to add him as particular owner of a collection (rarely, be careful) or as a user of a set and its objects (see section 4.4 and 7.2).

### 4.1 Create a user through the administration interface

For Administrators or GCM only.

- 1) Administration  $\rightarrow$  User management
- 2) Click Create a new user
- 3) Enter the details and a temporary password
- 4) The new user will receive a mail asking him/her to confirm and modify his/her password.

Note that new users will be created as a *Contributor*. If you want to change the type of this new user to become an owner, or even a GCM, you need to follow steps of 4.2.

### 4.2 Change status/role (and other information) of a user

- 1) Administration  $\rightarrow$  User management
- 2) Search the user you want to modify (for example click All Users).
- 3) In the list, in the column *Type*, click the **pencil** next to the user you want to change.
- 4) Enter the number that reflects the new type, and click the save icon.

You can, the same way, change the name, given name, user name and email address of users. Note that the column *USER* is the login name. You should not change this information.

A user of lower status cannot attribute another user with a higher status. For

example, if you are a GCM, you cannot declare another GCM to be an administrator. Only an administrator can do this.

### 4.3 Add an owner to a collection

Each collection needs to have a least one owner. Ideally, the owner is the researcher who owns or deposits the material. If this is not possible, then I recommend choosing a GCM as an owner.

- 1) In the Administration Menu, Click Collection Management
- 2) Next to the collection you want to edit, click the owner icon.
- 3) Click Add an owner
- 4) Look for the user you want to declare as owner and click the plus icon (note, if the user does not exist, create a new user under Administration → User Management, and add the owner later).

Clicking the **red cross** next to a user deletes this user as an owner (id does not delete the user as such).

### 4.4 Add a user and his/her rights to a set

Once a user has been created or accepted, you have to provide him access to your set(s) and define the rights this user has.

- 1) Manage my collections
- 2) Click the List sets icon.
- 3) Click the User icon.
- 4) Click the Add a user to this set link.
- 5) A list of users appears. Click the **blue plus** icon to select the user. If the user is not in the list, get in touch with the administrator. Only certain particular staff has the right to create new user accounts.
- 6) Define the particular rights of this user and click the save **button**. By default, only the "see everything" right is activated. You may change a user's right at any time (see section 7.2).

ou	are about to give rights to user Lorenzo Brutti to the above set
	Right to edit meta information
	Right to add annotations
	Right to annotate graphically
	Right to link objects
	Right to transcribe and create movie layers
	Right to add objects to the set
1	Right to see but not edit/add all of the above
Sa	ve

Carefully click those rights you want to grant to this particular user on this particular set. The individual rights mean the following:

Right to edit meta information	Each object has, as is the case with sets and collections, its own meta information, such as author, date, geographic location etc. This information is sensitive. You should not allow any other user than yourself to be able to edit meta information unless you are closely working with that person.			
Right to add annotations	Annotations are comments, to which others can reply, that accompany a particular object. An object can have as many annotations as you like, and each annotation can have as many responses as needed. They do not interfere with the meta of the object, but constitute a semantic layer on top of it. You can provide this right without hesitation to persons with whom you are collaborating.			
Right to annotate graphically	ODSAS offers a tool to delimit particular areas of an image and to annotate these areas. As above, you may provide this right to your scientific partners.			
Right to link objects	It is possible to link objects so to be able to jump easily from one object to another. One usually links objects because they are linked in the real world for one reason or another, for example a movie showing an artefact of which you also have a photograph and an ethnographic description. You can add as many links to an object as you wish. Links can be qualified. You may provide this right to your scientific partners.			
Right to transcribe and create movie layers	ODSAS offers tools to transcribe objects and to create semantic layers (annotations, transcriptions, translations) to movie and sound files. If you grant the right to transcribe, you also grant that person to see other people's transcription on a particular set.			
Right to add objects to the set	This is when a user is allowed to upload new objects and to insert them within an existing set. You will usually not grant this right to anyone else than yourself (this function has for security reasons been temporarily deactivated).			
Right to see but not add or	If sets are of restricted access, then links, annotations and transcriptions are not visible by the public. In certain			

edit all of the above

cases you may want to grant the right to see annotations or transcriptions to certain users, but you do not wish them to be able to edit or add new annotations and transcriptions. If this is the case, then you will grant this kind of right only.

## **5 First Steps: Collection and Set creation**

Collection and set management processes need to be undertaken with much care. This is where you will make your objects identifiable, searchable and indexable. The first step is to create a new collection, then to create sets in this collections and upload files, and finally to edit the metadata of the objects. You can change descriptions and metadata at any time.

The steps are

- 1) Create a collection
- 2) Create sets for this collection and upload files to the specified directory
- 3) Refine your sets' metadata
- 4) Browse and edit object-specific metadata

### 5.1 Create a new collection

A collection is a logical or scientific gathering of sets. For example, a researcher may want to have his or her collections in which are stored field notes, photographs, sound recordings etc. Typical types of collections are, for example:

- Grammars and dictionaries of Australian languages
- Scientific archives of Maurice Godelier, Papua New Guinea
- First contact movies
- etc.

*If you are a researcher* and would like to store your files on the platform, ask an administrator or a GCM to create a collection for you.

If you are an administrator, or a GCM, create a collection as follows:

- 5) Log in
- 6) In the Administration Menu, Click Add a new collection
- 7) Enter a name and a description for the collection (you or the collection owner can always edit later)
- 8) Click save

In the next screen:

9) Click Add an owner

10)Look for the user that has to become the owner of the collection and click the plus icon (note, if the owner does not exist, create a new user under Administration  $\rightarrow$  User Management, and add the owner later).

After these steps, the new collection will appear in your Collection Management interface. From there you can further edit the description or name, add owners and add sets.

### 5.2 Create a new set

Once you have created a collection, you can add as many sets as you wish to it. A set is a coherent collection of objects that belong together and that belong to a collection, and that are of the same type (images, movies, sounds). Let me take my own example.

I have a collection called:

- Research Archives of Laurent Dousset, Vanuatu

In this collection, I have created several sets:

- Field notebook 1, Vanuatu 2010
- Field notebook 2, Vanuatu 2010
- Photographs of Maskelynnes, 2010
- Photographs of Nimangki ritual, 2010
- Field notebook 3, Vanuatu 2011
- Recorded interviews, 2011
- Etc.

Good practice is the following rule: a set is a collection of objects/files of the same original physical type (negatives go with negatives, positives with positives, scanned notes with scanned notes etc.) that historically and scientifically sit well together.

I do not recommend mixing in the same set field notes and photographs, for example. It is wiser to link these objects later (see section 8.6).

Sets can have as few or as many objects/files as you like. A good rule is not to make sets too big, so that you can keep an overview. A maximum of 200 to 300 objects per set is a good rule. If you have more files, split the set into two, for example, if this splitting still makes sense. If not, keep larger sets. The software can handle it. I have sets that have only 10 objects, and others that have over 500 (too big, really).

Plan well what needs to sit together for good reasons, before you create your sets.

To create a set, follow this procedure:

- Under the menu My Space, Click Manage my collections
- Look for the collection in which you want to add a set, and click the blue plus sign
- Enter a recognizable name (you can reedit later if needed)
- Enter a description (you can reedit later if needed)
- Enter a year or a period. Make sure you read the instructions and make sure the first 4 characters are numbers (this is necessary to construct your timeline). You can reedit later if needed.



Timelines of your collections will be created by ODSAS if you enter the year/period field coherently (see 8.2.1 for instructions on how to enter dates in ODSAS).

- Choose an object type that suits best.
- Enter a comma or dash-separated list of keywords.
- Click the save button.

NOTE: in some cases, some fields are followed by the possibility to expand the information to all sets of the collection. This is very handy when all sets have the same author, for example, so you do not have to retype this for every set. Use with care, though.

*In other words:* If you know you will create several sets for the same author, or type, or any other metadata, then you may as well create all these sets without informing the metadata, and go back to the metadata interface later, edit them for the first set and then expand to all other sets.

After creating a set, you will be redirected to add files to this set (see following section). Note that you should at some stage come back to the set-editing interface to add more metadata. See section 5.4.

### 5.3 Add files to a set (image and PDF files only)

*Note:* Currently, sets with movies and sounds need to be created by the administrators.

Once you have created a set, the next step is to upload files into this set. There are two possible procedures:

- Upload manually each file, one after the other (this is suggested to users who do not have a GCM account), or in cases where you only want to add just a few files to an existing set.
- Upload all files at once.

It is highly recommended to use the **upload all files at once** procedure. However, this can only be done by someone who has access to the machine or who has an ftp account (check with the administrator or the GCM).

### 5.3.1 Add individual image or PDF files to an existing set

If you only want to add a few files to a set, you can use the manual method. Only use this method to add a few files. If you want to add many files, use the methods 5.3.2 or 5.3.3.

#### a) Uploading image files

Prepare your files so they are JPEG or PNG and have names without special characters. They should not be too large. 1MB is a good average.

1) Go the Manage my collections Section

- 2) Click on the list sets icon
- 3) Next to the set in which you want to add files, click the Add files + icon.
- 4) In the top form, click the Choose file button, select your file, then click Upload file
- 5) If everything goes well, you will get a success message, and you may upload a new file. Note that ODSAS will check your file type and filename, and if necessary change the filename to follow the standards.

#### b) Uploading PDF files

You can upload single or multipage PDF files. If it is a multipage file, it will be broken into individual objects. Each page of the PDF file will be converted into an image and inserted into the database. Please note that PDF files should not exceed 10MB. If your PDF file is larger, break it into several files, name each file differently and repeat the upload procedure with each file.

- 1) Go the Manage my collections Section
- 2) Click on the list sets icon
- 3) Next to the set in which you want to add files, click the Add files + icon.
- 4) In the second form, below, click the Choose file button, select your file, then click Upload file
- 5) If everything goes well, you will get a success message, and you may upload a new file. Note that ODSAS will check your file type and filename, and if necessary change the filename to follow the standards.

# 5.3.2 Upload all or many files at once into a new set (image, moovie and sound files)

Please do not use this method for PDF files, but use method 5.3.1 instead. Image files must be jpg or png. Movie files must be Quicktime or MP4, with extension .mov Sound files must me MP3, with extension .mp3

If you have GCM or an administrator account, after creating the set (see 5.2) you will get a message saying something like:

- 1) IMAGE Directory:/var/www/odsas3/odsas\_media/coll\_12/set\_1463/
- 2) MOVIE Directory:/var/www/odsas3/odsas\_httpd/media/coll\_12/set\_1463/
- 3) SOUND Directory:/var/www/odsas3/odsas\_httpd/media/coll\_12/set\_1463/

Now upload all the files of this set into the respective directories (make sure mp3 files go into the sound directory, and mov files into the movie directory), and then click:

I have uploaded all files into the directory. Proceed with verification and database update.

This will check the files, rename them if necessary, convert PNG to JPEG files and insert the data into the database.

After clicking the above link, the software will inspect the directory and do the necessary to add the objects to the set. When done, please edit the set details further in clicking the available here link (see 5.4).

/Library/WebServer/odsas3/odsas\_media/coll\_59/set\_1466 Files have been checked and renamed. 26 files and database entries have been processed. Please edit again the set details here

**NOTE:** image files need to be of the JPEG or PNG format and not exceed too much 1MB. Larger files are possible, but will slow down the platform. Please use conventional naming of the files. For more information, check the ODSAS Digitization handbook under the section *Handling filenames and directories.* 

Also note that the files will be inserted into the database following the usual Linux alphanumerical ordering of the filenames. For example, if you have the following files (this is how they will be order on Mac OSX and probably in Windows):

file\_1.jpg
file\_2.jpg
file\_10.jpg

The Linux ordering is different and would be as follows:

file\_1.jpg
file\_10.jpg
file\_2.jpg

To get a proper ordering of the files, you would need to have the following filenames:

file\_01.jpg
file\_02.jpg
file\_10.jpg

There are a certain number of free tools available to rename files automatically. Check the ODSAS Digitization Handbook.

**NOTE:** movie files need to be of Quicktime or MP4 format, and their extension must be .mov. Movie files will be automatically converted also to .ogv and .webm. This may take a long time, so be patient please.

**NOTE**: Sound files must be of the mp3 format and their extension must be .mp3

#### 5.3.3 Add several files to an existing set

If, for whatever reasons you were not able to finish the procedure described at 5.3.2, or if you want to add more files to an existing set, or if a user has created a set and asks you to upload all this files to his set, use the following procedure.

- 4) Log in as administrator or GCM and go the Collection management section.
- 5) Click on the **booklet** to list the sets of a collection.
- 6) Upload with ftp or sftp the new files to the directory of the set. This will usually be something like /odsas\_media/coll\_xx/set\_yy where xx is the collection id and yy the set id.
- 7) Click the scan folder for new files button of the respective set.
- 8) The software will analyse the directory and the database and tell you if there are new files, and allow you to integrate these new files into the database. Please follow the instructions and if possible click the save button to insert the new files into the database.

Inspecting directory Inspection du répertoire	/Library/WebServer/odsas3/odsas_media/coll_59/set_1467/*.
Files found Fichiers trouvés	26
Database entries Entrées de base de donnée	0
Action Procédure	There seem to be new files. If you are certain this is not a mistake (for example files of different sets in the same directory), cick the button to update the database Il semble y avoir de nouveaux fichiers. Si vous êtes absolument certain qu'il ne s'agit pas d'une erreur (par exemple des fichiers d'ensembles distincts dans le même répertoire), alors ciquez le bouton pour mettre la base à jour.

In the above example, the system has found 26 new files in the directory. Clicking the save button will add these to the set.

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### 5.4 More metadata for sets

Once a set is created and files have been added, you should edit further the set details. You can do this at any time. Unless you have already arrived at the setediting page through other means, you need to click: My Space  $\rightarrow$  Manage my collections. Then Click the set list icon of the collection, and then the edit pencil of the particular set.

In particular, you will have to further add or edit:

- Authors
- Languages
- Countries
- People
- Keywords
- Access rights
- Publicity of transcripts
- Watermark text
- Watermark type

The entry principle of authors, languages, countries and people are the same: in the right box, start typing the language, country or people and when what you are looking for appears, click the respective entry that will appear as a link. You can add as many languages, countries or people you like. You can delete selected information by clicking the **rubbish bin** next to the information. You may also extend the information to all sets of the collection.

Note that:

Authors A set can have as many authors as you wish. Note that an author is not necessarily the owner, or the person responsible for the set. The author is the actual creator of the objects. Enter the author's name and select from the available list. If the author is not in the list, you can create it by clicking the + icon. Note however that your new author must be entered in the following form:

*Name, given name* (don't forget the comma after author)

If the author is an organization or similar, only enter the name without a comma.

**Languages** This is a list derived from the official ISO-639-3 language list. If you can't find the language, try typing alternative spellings. You can find these on the following website, for example:

https://www.ethnologue.com http://glottolog.org/

If your interface language is French, the language names will be French. If your interface language is English, then the language names will appear in English. But do not worry, the visitors will see the language name in the interface language they select.

**Countries** This is a list derived from the official ISO-3166A3 country list. It also comes with coordinates for the capital of the country. These coordinates will be used if you do not declare specific coordinates for the set or the object.

If your interface language is French, the country names will be French. If your interface language is English, then the country names will appear in English. But do not worry, the visitors will see the country name in the interface language they select.

- **Peoples** These can be tribal, ethnic or other group names. Create your own if not available by click the + icon after entering the name.
- **Keywords** Keywords should concisely describe the content of the set. Please do not add country names, language names or peoples into keywords, since these will already be stored in the above information. You may add geographic regions, particular dialects that are not in the language field, topics or scientific disciplines... whatever allows for better object descriptions and search results.

#### Access rights:

Select the level of rights you want anonymous visitors to have on this set.

There are several types of access rights. Note that the rights you grant here are generic. They are not valid for registered users to whom you have defined particular access rights, but are valid for the general public or registered users for whom you have *not* defined particular rights for this set. You may choose to provide one of the following 6 types of access rights:

		General public can see the object	Low resolution only for public	Medium resolution image available for public	Incrustation of copyright text into image
1	No public access				
2	Public access granted, but images only in low resolution and with an incrusted copyright text	X	X		x
3	Public access granted, but images in low resolution only	X	x		
4	Public access granted, images in medium resolution and with incrusted copyright text	x		X	x
5	Public access granted, images in medium resolution	X		X	
6	Full public access	X		X	

**Transcriptions are they public?** ODSAS provides a tool for transcribing objects, such as manuscripts, field notes, books etc. ODSAS also provides a tool for transcribing (layering) movie and sound files. If you wish these transcriptions to be publically accessible, you need to grant public access to them. Otherwise, even if you grant public access to the objects themselves, the transcriptions will remain restricted.

**Incrustation/watermark text:** You may wish to add a text, for instance a copyright notice, that will print on top of each image of the set. If you wish to do so, enter the text in this field (don't make it too long!). Note that you may modify this text whenever you wish, and note that incrustation of text will not alter the original object itself.

**Incrustation/watermark type:** You may choose between two incrustation types. One diagonal and large, prohibiting reusing the photograph in another context; the other smaller and at the bottom right. You may alter this at any time; and the change will immediately be reflected on the objects.



Left: the more discrete horizontal copyright notice. Right: the more intrusive and secure diagonal copyright notice.

**Do not forget** to click the save button at the bottom.

## 6 Manage your collections

Collections are a useful way to organize your data and to make them accessible to visitors and other researchers. Collections contain sets; the latter are either open or restricted. Access restrictions are organized at the set, not at the collection or object level.

Make your collections as explicit as possible, so that everyone understands what kind of data is in a particular collection. Note that it is not forbidden to have the same set with the same objects in several collections, but you should as much as possible avoid duplicates and duplication.

In the Collection Management interface you manage your collection names, descriptions and collections owners. You can export data as spreadsheets or SQL files, and you can add new sets to a collection (as seen in 5.2).

### 6.1 Edit collection details

- 1) My Space  $\rightarrow$  Manage my collections
- 2) Click the pencil icon next to the collection you want to edit
- 3) Edit the name and/or the description (have bi- or multilingual description if you like)
- 4) Click the save button.

If you change the name or the description, make sure it does still reflect the sets that are part of the collection.

*TODO*: Multiple names (for example in distinct languages) for collections are not yet managed. If you want bilingual names, at them both in the name and description field.

### 6.2 Create and View set list of a collection

The table of contents icon allows you to view and edit the sets of a collection (see section 7 for more details on set management). If there are no sets in the collection, you need to create a set (see section 5.2).

### 6.3 Owners of a collection

Each collection needs to have a least one owner. Ideally, the owner is the researcher who owns or deposits the material. If this is not possible, then I recommend choosing a GCM as an owner. To define the owner of a collection, see section 4.3.

Owners are considered responsible for a collection, the sets that sit in it and the objects that are part of it. They need to decide which sets (and their objects) can be accessible by the wider public and which should remain restricted. They have the responsibility to attribute other users specific rights on the sets and objects.

Administrators and GCM should make this point clear to collection owners. The ODSAS platform provides a service to researchers and cannot be made responsible for their legal or moral mistakes. Owners need to understand that they are managing their sets and objects under their sole and unique responsibility.

It is also wise that administrators and GCM discuss with collection owners to determine a person than can take decisions and be responsible for the collection if the collection owners is in the incapacity to do so him or herself.

These discussions should be concluded through the signature of a moral agreement between the person or institution hosting the platform and each owner depositing material.
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## 7 Manage your sets

The Set Management interface is where you define most of the generic metadata, the users and the organization of your objects/files. Most features are self-explanatory, so this section will only succinctly recall the functions.

## 7.1 Set metadata management

See section 5.2 and section 5.4

## 7.2 Edit users rights on sets and objects

See section 4.4

## 7.3 Geolocalisation

If possible, every object and every set is geo-localized. There are three ways of geo-localization:

- at the object level (see 8.2.1)
- at the set level (the current chapter)
- at the set metadata level (if necessary taking country capital coordinates)

If you define a country in the set metadata description, then this country's capital coordinates will be taken as coordinates for the set and for each object. If you define several countries, the first country's coordinates are taken.

The set will inherit the country's coordinates, unless you define specific coordinates for this set.

Each object of the set will inherit the set's coordinates, unless you specify specific coordinates for an object.

To define the coordinates of set:

- 1) In the set management interface, click the globe
- 2) Enter coordinates as decimal values
- 3) Click on Check coordinates to see if the coordinates you entered are ok. If not,

change them and click again Check coordinates.

4) If you are happy, click Save for this set or click Save for all sets of this collection to expand these coordinates to all other sets of the collection.

## 7.4 Reorder the sequence of objects within a set

Once the files have been uploaded to the server, you are able to reorder the sequence of their appearance, if the order is not correct. Normally, if you have named and numbered your files properly, this should not be necessary. Check the ODSAS Digitization Manual for more information.

The original sequence in which the files are displayed is the sequence of their digitalization or their insertion into the database. Usually, the owner would have discussed with the digitizer the sequence of digitization. In other cases the physical organization of the material makes clear what the logical or historical/chronological sequence is. There may however be cases where you would like to reorder this sequence. You can do this with this function.

- 1) In the set management interface, click the order icon.
- 2) If you want to reset to the original order, click **Reset ranking...** If you want to change the order, click **Proceed to manual order**.
- You will get to a new window. Simply click and drag the images where they should be, until you are happy. You will probably have to scroll down and drag down the images.
- 4) Once you are happy with the order, click the save button.

Click each image and drag it to the place you want it to sit. You may have to drag the same image several times if you also need to scroll down the window.



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## 7.5 Links between sets

In some cases it is useful to create links between different sets; for example to indicate a sequence between volume 1 and volume 2 of books. This links will appear in the object browse interface to allow you to quickly jump to linked sets. (You can also link individual objects, see 8.6).

To link other sets to a particular set, proceed as follows:

- 1. In the set management interface, click the links icon:
- 2. Click the blue + icon of the set that has to be linked
- 3. The cursor will jump down to a textbox where you can qualify your link. For example you could enter "volume 1 to volume 2".
- 4. Click the save button.

If you want to link other sets, start the same procedure again.

To delete links, go to the same interface and click the delete button next to a linked set.

## 7.6 External links to a set

You can add external links to a set. These will be displayed in the set summary and in the set and object metadata. Note that you can also add links to particular objects of a set. So only add links here that are generic for the entire set.

To do so:

- 1) In the set management interface, click the external links icon:  $^{\it f}$
- 7) Enter a name, and then the entire URL. Make the name short. For example, if you want to link a specific page on the Australian Archives website, you could enter for name 'NAA record' and for the URL the entire web link, such as :

http://recordsearch.naa.gov.au/SearchNRetrieve/Interface/DetailsReports/ItemDetail.aspx?Barcode=1990438&isAv=N

2) Click the save icon.

To delete links, go to the same interface and click the **delete** cross next to a link. You can add as many links to a set as you wish.

## 7.7 Export Meta

The export meta button allows you to download a spread sheet with the set meta data.

Click the button and read the instructions. Note that the file is UTF-8 encoded. In some cases Excel does not read properly such encoding. I recommend using LibreOffice or OpenOffice.

## 7.8 Export as JPEG

This function allows you to repatriate all images of a set in a zipped file. Note that this function is very server-intensive and it may take some time to process the compilation. Do not interrupt and wait until the link to download the file appears.

## 7.9 Import Meta data

This function allows you to import a tab-separated file with meta information and to add this meta data to the objects of a set. The advantage is that you may prepare your meta-data without being online, and then upload your files to the server for an automatic addition to your set. This process is not very complex, but will expect from you very conscious attention and work so you don't mess up any previously entered meta-data. Before you do prepare your meta-data file, you should upload all files/objects that should be in the set.

To create your tab-separated meta-data file, ODSAS allows you do **download an empty Excel sheet** having only the ODSAS id and the filename of your set. This should ease your work and avoid any confusion. Do to so:

Click on this icon de of the set for which you want to upload meta-data, scroll down and click on the Excel sheet icon:

The downloaded file will look similar to the following:

1	kupka/carton1/item1/ph156.jpg	
2	kupka/carton1/item1/ph155.jpg	
3	kupka/carton1/item1/ph56_2.jpg	

The first column is the ODSAS id, which uniquely identifies the files/objects of your set. The second column is the filename of the object that is associated to the ODSAS

id. If you want to check the object online, simply go to:

https://www.odsas.net/object/1 https://www.odsas.net/object/2 etc.

Where the number of the object/ is the ODSAS id.

You may now prepare your meta-data file. The information you can add, each on one column following the id and filename, are the following:

- Title and description
- Keywords (separate each keyword with a semicolon (;)
- Geographic location
- A year or a date, such as yyyy or yyyy-mm or yyyy-mm-dd
- A copyright notice for the object
- An external URL (for example to a collection to another website)
- A relation (usually the location of the original physical object)

**Note**: None of these fields are compulsory. You may have some or all of these columns informed, as you wish, and you may have them in your Excel sheet in the order you wish. ODSAS will reorder the columns automatically. If an object already has meta-data attached, the uploaded file will replace the existing meta-data. However, it will only replace the meta-data you actually select to be uploaded. See below.

**Note**: You are allowed to have several columns with the same content type, for example a column for title and a column for description. However, during the import process, ODSAS will combine these columns into one.

**Note**: do NOT enter a line with your column titles. If you do so while you enter data, don't forget to delete it before importing to ODSAS.

**Note**: You do not have to have a line for each object of your set. You may choose to import information only for some of your objects. However, if you do so, delete those lines that have no information other than the ODSAS id and the filename. Your file must only present does ODSAS ids or filenames for which you actually want to import meta-data.

When you are ready, please save the file (very important !) as a text only and tabseparated file. Do not enclose columns with quotes " or any other form of delimitations. Only tabulator. Save it as  $my_file.txt$  or similar (extension must be txt).

To import the file, proceed as follows:

- 1) Go to Collection Management, then list your sets and scroll to the set for which you want to import meta-data
- 2) Click on the 🖾 icon, scroll down, **read instructions**, click on <u>Choose File</u> and select the tab-separated file you just created. The click on <u>Upload file</u>.
- 3) Something similar to the image below will appear. It will show the first few lines of your file and a header-line in which you can select what the column is about. If you have many columns, you may need to scroll to the right.

ODSAS id 🗘	Title/Words 🗘	Title/Words 🗘	Date 🗘	Choose 🗘	Title/Words 🗘
1	kupka/carton1/item1/ph156.jpg	Kupka's photograph of a shield	1965	Karel Kupka;Shield;Material culture;	This photograph of an object was probably taken in Arnhem Land
2	kupka/carton1/item1/ph155.jpg	Another title	1967	Karel Kupka	And yet another description
-					

- 4) On top of each column, select for those columns you want to import the appropriate head-field. Do not forget to select ODSAS id for the first column! As you can see from the example, I have chosen 2 columns to be Title/Words. They will be combined by ODSAS during the import process. And I have chosen not to import column 4. I have done so by not assigning any column title (if you want to do that later, you can always come back and follow the same procedure).
- 5) Once you are happy with the way you have assigned a title to each column, click the small **import** button just above the table. ODSAS will process your file and if everything goes right tell you how many lines/objects have been inserted.

Go back to <u>https://www.odsas.net/object/1</u> or <u>https://www.odsas.net/object/2</u> etc. to check that everything has been imported.

## 7.10 Import Annotations

The basic process for importing annotations to objects of a set is the same as the one described in 7.9 Import Meta data above. Please read this section before you go ahead.

The main differences are:

- you can import several annotations for one and the same object/file
- each annotations is on a separate Excel sheet line
- you may therefore duplicate ODSAS id numbers or filenames on several lines

Please prepare your file as a spreadsheet (see above if you want to download an

Excel file with all the ODSAS ids of the set). Each line can have the following information:

- ODSAS id and/or filename
- A title for the annotation (not compulsory, but recommended)
- The text of the annotation (compulsory)
- The author of the annotation (not compulsory)
- Access rights to the annotation. The values are 1 or 0. If you enter 1, then the annotation will be publically visible. If you choose 0, then it will be private. Note that if you do not enter this column, the default will be O (private).
- A date such as yyyy or yyyy-mm or yyyy-mm-dd (not compulsory)

To import your annotation file, proceed as follows:

- 1) Go to Collection Management, then list your sets and scroll to the set for which you want to import meta-data
- 2) Click on the red icon, scroll down, **read instructions** click on **Choose File** and select the tab-separated file you just created. The click on **Upload file**.
- 3) Something similar to the image below will appear. It will show the first few lines of your file and a header-line in which you can select what the column is about. If you have many columns, you may need to scroll to the right.

ODSAS id 🗘	Choose 🗘	Title \$	Date \$	Text O	Author \$
1	kupka/carton1/item1/ph156.jpg	Disagreement	2015	I disagree with the interpretation given for this object. I believe	Laurent Dousset
2	kupka/carton1/item1/ph155.jpg	Me too	2016	Why should we	

- 4) On top of each column, select for those columns you want to import the appropriate head-field. If you want to import several annotations for one and the same object, simply duplicate a line before you import the file and adapt the information. Note that a new import will NOT replace existing annotations but add new annotations to the object, so import the file only once. You may have as many annotations as you wish for an object.
- 5) Once you are happy with the way you have assigned a title to each column, click the small **mport** button just above the table. ODSAS will process your file and if everything goes right tell you how many annotations have been inserted.

Go back to <u>https://www.odsas.net/object/1</u> or <u>https://www.odsas.net/object/2</u> etc. to check that everything has been imported.

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## 7.11 Add files to a set

Allows you to add individual files to an existing set. I recommend using this function only if you want to add a few image files. If you have several files, use the bulk upload function. More information is in section 5.3.

Also note that if you upload yourself files, there is no warranty on the quality of the file and the backup of the original high-resolution file. I recommend discussing the issue with your GCM.

## 7.12 Scan folder for new files

Also see section 5.3.3.

This function is only available to administrators and general collection managers.

You may use this function in 2 cases:

- A user has created a set but has not uploaded any files to it.
- You want to add several files to an existing set.

In both cases, what this function does is check the directory of the particular set for JPEG or PNG files, and check if these files are already marked in the database.

- If there are more files in the directory than in the database, then it will suggest reading these into the database.
- If there are fewer files in the directory than in the database, then it will try to point to the problems (obviously some files must have disappeared; also see the error log function in section 3.6).

To add files to a set, proceed as follows:

- determine the directory in which you want to add the files. To know this, you need to note the collection id and the set id. The name of directory will be

```
odsas_media/coll_xx/set_yy
```

where xx is the collection id and yy the set id.

- Upload with ftp or sftp all new files to this directory. Make sure the files are of the jpg or png format and have the appropriate file extension. Also make sure the files you upload are not too large.
- Go to the set management interface and click on the Scan folder for new files icon.

- Wait for the result and click the link to add the new files to the database.

## 7.13 Delete a collection

This function is only available to administrators and general collection managers.

PLEASE BE CAREFULL WITH THIS FUNCTION!! THE CONSEQUENCES ARE IRREVERSIBLE.

Clicking the rubbish bin will allow you to delete a collection. Note that you can only delete a collection of you have beforehand done of the following:

- deleted all sets that are in the collection (see 7.14);
- migrated a set from one collection to another collection (see 7.15).

Steps to completely delete a collection:

- Go to "Manage Collections"
- > Click the **rubbish bin** of the collection you want to delete.
- Read carefully, and if you are absolutely sure you want to delete, then click yes delete.
- > Once deletion is finished, click on continue.

## 7.14 Delete a set

This function is only available to administrators and general collection managers.

PLEASE BE CAREFULL WITH THIS FUNCTION!! THE CONSEQUENCES ARE IRREVERSIBLE.

Clicking the rubbish bin will allow you to delete a set and all the information attached to it, including entries in the database that identify the set's objects.

Note that the physical files, if there are any, are not deleted. You will still find them in the set's original folder. However, if a new set is created and the database attributes to this set the id of the set you have deleted, then new files will be added to the original set's directory.

#### To permanently delete individual objects as well as their original files, see section 8.9.

Steps to completely delete a set:

- Go to "Manage Collections"
- > Click the Sets icon of the collection in which is the set you want to delete.
- > Click the rubbish bin of the set you want to delete.
- Read carefully, and if you are absolutely sure you want to delete, then click yes delete.
- > Once deletion is finished, click on continue.

For information, the following data is deleted:

- annotations
- fulltext
- image incrustations
- graphical annotations
- oai database
- objects/files
- objects/Files metadata
- user additions
- PDF files
- physical processes
- set meta data
- author relationships
- geographical coordinates
- country rel
- language rel
- links
- object type rel
- people rel
- visit statistics
- transcriptions
- user image settings
- user parcours
- user rights
- user statistics

## 7.15 Migrate a set from one collection to another collection

This function is only available to administrators and general collection managers.

You can migrate one set from a collection to a new collection. You may want to do this if you want to reorganize your sets and collections, for example. To do so, follow the following steps.

- ➢ GO tO "Manage Collections"
- > Click the Sets icon of the collection in which is the set you want to migrate.
- > Click the migration icon of the set you want to migrate.
- In the drop-down list, choose the collection to which you want to migrate the set.
- If you are absolutely sure you want to migrate, then click the migrate now button.
- > Once migration is finished, click on continue.

**Please read all messages**, in particular the red ones. They will provide you with important information. In particular, note the following:

- If, for historical reasons (this should not be the case in new ODSAS installations from version 3 onwards) the set you migrated is in an unconventionally named collection directory, for example dousset\_vanuatu/my\_set\_1, then the original files <u>will not be moved</u> to a new location. They will remain in their original location! This is very important. Thus, <u>make sure you never delete directories</u>, even if you think the collection does not exist anymore.
- If, on the other hand, you are on a new version 3 installation, with conventional naming of directories (such as coll\_23/set\_56), then the original files will me moved to their new collection directory and automatically deleted from their original location.

## 8 Managing objects

Remember that an object is part of a set, and that a set is part of a collection.

We have seen how you manage entire collections and sets. In this chapter we will se how you manage and take benefit of individual objects within sets and collections.

Objects are individual files, images, texts, movies etc. They are the cores of the ODSAS platform. For example, for indexing and interoperability issues, the information on the object takes precedence over the information provided for a set; and the information provided for a set takes precedence over the information provided for a set takes precedence over the information provided for a set.

On the other hand, information provided to a set is inherited to the object if the object lacks the kind of information.



Objects are very important because they are the level where the researcher will actually work with the data. It is thus crucial to understand the possibilities ODSAS offers, and make the most efficient usage of the platform. Hopefully it will improve your experience as a researcher.

This part of the handbook will explain the various tools the platform offers for managing your objects and their metadata. They have been thought to increase the research quality and production.

## 8.1 The object browse and management screen

To edit metadata of objects and operate other available functions, you need to browse to the particular set and object. Indeed, unlike collection and set management, the object management interface is integrated in the public viewing interface of the object itself. To see and use these functions, you need to be logged in.

Start with logging in, then go to the set in which you want to work the objects. To browse quickly to the particular set you want to work on, there are several possibilities:

- On the homepage, find your name under the Authors section and click it. Then choose the set on which you want to work and click the Access set link.
- Under the My Space Menu, click on Direct Access to Sets
- In the set management interface, click on the eye (browse icon).

Each object's browse-window has several sections which I will detail below (see next page for illustration):

- Top-centre: Actions menu
- Top-left: Navigation bar
- Left: Toolbar
- Centre: Transcription
- Centre: The object itself
- Top-right: Search and quick jump box
- Top-right: Hierarchy box
- Top-right: Links to other sets box
  - Centre-right: Metadata box
- Bottom-right: Annotations and discussion box
- Bottom-right: Links to other object box
- Bottom-right: Exif metadata information of image

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We will rapidly attend to each of these parts of the screen, but come back to some of their particularities in further sections of the handbook.

**Action menu:** This menu is only visible if you are logged in and if you browse an object on which you have rights. It contains the following object-specific functions:

- add a text annotation to the object,
- add a graphical annotation to the object,
- add a transcription of the object,
- link the object to other objects

and it contains also set-specific functions:

- create a PDF file of the entire set
- download the PDF of the set if already available
- download an RTF file containing all transcribed pages of the set (the RTF file of the specific object only can be downloaded from the Metadatabox).

**Navigation bar:** The navigation bar functions like a visual index of the objects of a set. These objects are presented in a group of 7. Click the arrow on the right to see the next 7 objects. Click the arrow on the left to move to the previous 7 objects. Note that you can move within this index while remaining on the page of the current object itself. The current object, if it is part of the group of 7, is underlined with a triangle. Click any object of the index to jump to this object. Click on the thumbnail of the current object to reload the page (this may be necessary in some cases to see if changes have been properly saved).

#### Search and quick-jump bar:

1) The search box allows you to move quickly through a set or to find a particular item. It has a search box in which you can use the % sign as a wild card. For example, if you want to search for all objects that somehow talk of "Captain Cook", you may want to enter

Captain%Cook

This will also find sentences such as this one: "The captain's name was Cook". The % sign hence stands for any kind and number of character between words.

Cap%n

This search will find "Captain", but will also find "Cap Horn".

2) The <u>Semantic cloud</u> is still somewhat experimental. Clicking this link will construct a cloud with the words used for all objects of the current set. Clicking words in this cloud brings you to a list of objects that are relevant. Note that the semantic cloud is built around a double calculation: the occurrence of words and the proximity between words.

3) **Timeline**: If you have properly informed the year/period metadata of the sets of the collection, then this function will display a time-ordered graph of your collection's content. Click the sets in it to browse them.

4) The Quickjump button lists all objects with their id-number and filename. The current object is preceded by a >> sign. Simply select an object of the list to jump to this object.

5) Table of contents allow you to see a list of all objects of the set.

6) Sets list the other sets of the same collection for quick navigation between sets.

**Toolbar:** Each object has a toolbar. Tools that are available in this bar depend again on the current user's rights. Basically, you may manipulate the object itself in graphical ways without changing the original file. If you are a registered user, you may save these settings. We will come to these features later.

**Transcription**: If you have transcribed the object, you may view or hide the transcription here clicking the see/hide Transcription link.

**The Object:** The object itself is displayed only if you have access rights. The object loads, depending on these rights, twice: once in low resolution and once in medium resolution. The image printed on screen is in low resolution. However, if you wait for the medium resolution image to have loaded, then:

• **moving over the image** with the mouse will display a magnifying glass over the medium sized image (see example in image below). Note: this is not working like the "usual" magnifying glasses available on certain websites or as browser plugins, since it does actually fetch the higher resolution bits of the image and not simply magnify the low-resolution image. Of course, the quality of the zoom will depend on the quality, resolution and size of the original image.



• clicking the image will enlarge this image and replace it with the medium resolution image to fill the screen. Clicking this large image again will reduce the size of the image back to low resolution and will place the object back into its place.

**Hierarchy**: This box recalls in which collection and set the object is situated and allows moving to the set's table of contents and the collection's full list of sets.

**Links to other sets**: If there is a link between this set and another set (see section 7.5), this link will appear in this box, and allow you to quickly jump to the linked sets.

**Meta-box:** This is where the basic information about the object is stored and can be edited. We will come back to this important box later.

**Annotations and discussion box:** If people add text or graphical annotations (see Action menu), then the details will appear here. Users with appropriate rights can respond to a particular annotation and engage in a discussion, a bit like a mini-forum.

**Links to other objects box**: Other objects that are linked to the current object are displayed here (see Action menu).

**Exif metadata box**: This is data fetched from the original image. EXIF (Exchangeable Image File Format) is information stored in the image when the photograph was taken or the document digitized. It does store information about the conditions and the machine that took the scan.

## 8.2 The meta-box

The meta-box contains simultaneously the information describing the object, as well as the tools to make these descriptions. To access certain tools, you need specific rights. The meta-box does change according to the type of the current object (image, sound, movie).

Metadata is very important. It allows identifying the object and finding it later on. You should spend time thinking about the data you enter in this box. There are some tools that will help you to enter data globally: the global tick box and the Edit by Groups function.

Generally:

- Click the pencil to edit the metadata of a particular line.
- Click the save icon the save the metadata.
- If you tick the **global** box while editing, then the information you enter will be expanded to all objects of the current set. Be careful when using

the **global** box. You only tick this box if you are sure that all objects of the set are, for example, from the same author, or the same year etc. This will avoid you having to enter identical data in all objects. However, if only some objects have identical metadata, use the Edit Meta-Tags by Groups of Objects link at the bottom of the meta-box.

Object(s) ID	52107					
Permanent URI	http://www.odsas.net/object/52107					
Title		1				
Author(s)	Laurent Dousset	R				
Year/Period	2010	1				
Location	Vanuatu	1				
Coordinates	lat -16.427 / long 167.806	1				
Copyright	Laurent Dousset					
Copyright	Laurent Dousset	1				
Copyright Rank File	Laurent Dousset 121 / 125 vanuatu1 0005.jpg	1				
Copyright Rank File Filesize	Laurent Dousset 121 / 125 vanuatu1_0005.jpg 683 Kb   2200 x 1529   8 bits   image/jpeg	-				
Copyright Rank File Filesize Transcription	Laurent Dousset 121 / 125 vanuatu1_0005.jpg 683 Kb   2200 x 1529   8 bits   image/jpeg [ see/hide ] [ download ]	1				
Copyright Rank File Filesize Transcription Sequence	Laurent Dousset 121 / 125 vanuatu1_0005.jpg 683 Kb   2200 x 1529   8 bits   image/jpeg [ see/hide ] [ download ]					
Copyright Rank File Filesize Transcription Sequence Quote this document	Laurent Dousset 121 / 125 vanuatu1_0005.jpg 683 Kb   2200 x 1529   8 bits   image/jpeg [ see/hide ] [ download ] Dousset, Laurent 2010 [accessed: 2014/11/11]. "Object Id: 52107". In <u>Carnet de terrain 1, Vanuatu</u> 2010. ODSAS: http://www.odsas.net/object/52107					

Example of a meta-box in which the line "Author" is being edited

#### 8.2.1 Meta-descriptors of images (or text images)

We will look at these meta-descriptors line per line.

- **Object ID:** The unique identification number of the object. You can't modify this id, and no one should ever try to modify it.
- **Permanent** This is the URL where you object is and will always be available, even if the software (ODSAS) changes.
- **Title:** The content or subject of the object. This field is **particularly important**, since it will help to find the object later on. You are free to enter one or several sentences, keywords, names, etc. Whatever you think is relevant to understand and identify the object. The size of the text is unlimited and can have several line. You can copypaste your text from another application into this field. **NOTE**: metadata, including the title, are always visible by the public, even if the object itself is not. So you should be careful about the information you enter there. If you need to enter confidential information, rather use the text annotation tool and make your annotation private (see 8.4).
- **Keywords** You may enter keywords for a particular object. Please do not enter geographical places, dates or authors, since this is supposed to go into the other meta-fields. Keywords are words or very short phrases that allow to better characterize and later find your objects.
- Author(s) The author of the particular object. If the author of all objects of this set is the same, I recommend entering it once and ticking the global box. The text is limited to 200 characters. The author would for example be the person who took the photographs, who write the notes, who shot the movie, or who recorded the sound.
- Year / period The year or period for which the object is relevant. The format is yyyy or yyyy/mm or yyyy/mm/dd. Make sure the first 4 characters are always numbers. The field is limited to 200 characters. Here are a few examples:

2009 - 2010 2009 and after 2010 and before 2009/02/15 - 2010 sometime in march

- **Relation** You can enter free text. This field corresponds to the Dublin Core field "Relation". You can enter any information that is relevant in the way to contextualize the object, in particular with its origins. Ideally, however, you enter here a text or a description that indicates where the original physical document is located.
- Location Contains any particular geographic information that expands the

Sequence

information of the set, such as place names, region, country etc. You are free on how you want to enter this data, but I recommend going from the larger to the smaller. For example, you could enter something like:

Vanuatu, Malekula Island, Lamap village

- **Coordinates** You can personalize the coordinates for the particular object. If you don't, then the coordinates of the set will be taken instead. If you want to change the coordinates for all objects of the set, then you should do that in the set management interface (see section 7.3). If you edit this field, an updated Google map will only appear if you reload the page. To do so, click the current object thumbnail in the navigation bar.
- **Copyright** Enter any text you believe should accompany the object. This is in many cases a field in which you would tick the global box, since most of the time you will apply similar copyright notions to all objects of a set. An example could be:

Copyright by Laurent Dousset 2014. Use of information and image allowed for personal and scientific purposes. Please contact the author/owner if you do so.

- Rank This is the place where the object sits in the order of the set. For example, if the set has 230 objects and you are watching the first object, then the rank is 1/230. Usually the rank is determined by the digitization or upload-sequence of the file. You can change the rank by reordering the objects of your set (see section 7.4).
- File This is the original filename of the object. If you have given appropriate rights to see medium resolution images, then you can click this filename to see it in its full resolution in a new window. Right-click the image and choose "save as image" (or similar, depending on your browser) to download the image as an image file.
- **Transcription** Transcriptions are usually relevant only for images that present text. It can be useful to search objects or to create the semantic cloud (see above). You will be able to download the transcription as an RTF file. More information on the transcription function follows below.

SequenceThis is the only field where you can edit the name of the field as well<br/>as its content. You may leave the sequence as is, if you wish.

Sequence type is the first editable field. This can be something like (a few examples):

Page: if the object is a numbered page

Folio: for a numbered archive Serial number: for a photograph, for example

In most cases you could check the **global** box, since there are chances that all objects of the set have the same sequence type.

In the second field you would enter the actual sequence, that is the number that goes with the sequence type. Here is an example of what could go into these fields.

Notebook page 💋 4

In the sequence type field I have entered "Notebook page" and have checked the global tick box since this set is the digital version of one of my notebooks. In the sequence itself I have entered the number 4, since the particular page I was on when looking at the object was paged 4. Note that the edit pencil is on the right of each field.

- **External links** You may add external links that are relevant for the object. These may for example by records held by archival institutions, illustrations hosted on other databases etc. If you do not enter any particular link for an object, but you have entered a generic external link for the entire set, then this link will be displayed here.
- **Quote this** Depending on the information you enter in your set management interface and in this metadata box, the way to quote the current document will change.

#### 8.2.2 Edit meta-descriptors by groups

At the bottom of the meta-box you will see the following link: Edit Meta-Tags by Groups of Objects.

If you are the owner of the set, or if you have been given rights to edit metadescriptors for objects, this additional link will appear at the bottom of the metadescriptor box. This function is useful if you want to add identical descriptors to several objects, but not to all, at the same time. If you click this link, a new page will appear with all the objects of the set displayed as thumbnails, including a form in which you can enter data and a save button at the bottom.

Use this function carefully. It is powerful and allows you to gain a lot of time, but it is also dangerous.

The function allows you to edit globally specific metadata for particular objects. For example, if several objects of your set should have the same title, or author, you can use this function.

#### There are three steps:

	Warning: the information	on you provide in this form	n will replace th	e existing meta information you already enter	ed for those objects you select below!	
TEP 1: teta fields. Il only those fields for hich you want to enter entical data in checked ojects below. If you only ant to change the Author several objects only.	Author(s) Year/Period Title Location Copyright					
ter this information and ave the rest empty.						
	Thumb	Object(s)	Author(s)	rear/Period Title	Location	Сорутір
EP 2:		52103 vanuatu1_0001.jpg	Dousset	2010	Vanuatu	Dousset
jects for which u want to ange the etadata you	• 185	52104 vanuatu1_0002.jpg	Laurent Dousset	2010	Vanuatu	Laurent Douiset
tered above		52105 vanuatu1_0003.jpg	Laurent Dousset	2010	Vanuatu	Laurent Dousset
		52106 vanuatu1_0004.jpg	Laurent Dousset	2010	Vanuatu	Laurent Dousset
		\$2107	Laurent	2010	Vanuatu	Laurent
EP 3: ttom of page visible here):	•					

1) Enter the meta information into the fields provided. Note that if you leave a field empty, it will not affect any object description. So only enter data in the fields that are relevant for the objects you are going to tick below.

2) Check all objects for which the information you entered in the field (Step 1) is relevant. Note that if there already is information for a particular object, this information will be completely replaced by the new information you provided in Step 1.

3) Go to the bottom of the page and click the Save button.

The modifications will be undertaken, and you will be returned to the same page, including a notice on top indicating what has been changed and where. You may then make other changes until you are satisfied all objects of the set are conveniently described.

## 8.3 Layers for movies and sounds

The significant difference between the "normal" objects meta-box and the movies and sounds meta-box is the additional field called Annotation layer(s), which is somewhat similar to the transcription function. If you are viewing an object that is a sound or a movie, the Actions menu has an additional function: Add a new movie/sound layer.

A layer is a set of text data that is tied to the movie's or the sound's time code. For example, a layer can be a word by word or sentence by sentence or scene by scene translation, transcription, explanation, comment etc. etc. You are allowed to create as many layers as you wish. You are even allowed to create several layers of the same type.

The types of layers to choose from are

- 1. transcription of the spoken words
- 2. translation of the spoken words
- 3. general notes
- 4. personal notes

Layers are helpful for:

- When you watch a movie with a particular layer, the text that goes with a particular part of the movie is automatically retrieved at the right time and shown on screen. This works like subtitles, transcriptions, translations etc. that are shown at the right time in the right space.
- When you search for a term that exists in a layer text (also called a movie or sound annotation), you can move to the exact movie or sound sequence where this text is relevant.
- When you browse through all text annotations in a layer, you can jump through the movie or sound from text-location to text-location.
- The text entered as a layer will show up in search results.

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The steps to create a layer and annotate a movie or sound recording are the following:

1) create the layer

2) navigate to the annotation layer

3) watch the movie or listen to the recording and stop it whenever you want to add an annotation

#### 8.3.1 Create an annotation layer

**Step 1:** To create a movie or sound layer, you need to navigate to the movie or sound and own the specific rights that allow you to transcribe.

In the Actions menu click on Add a new sound/movie layer.

Enter a name for you layer and choose a "layer type". These types are for your convenience only and have no repercussion on the way the information is stored. The following predefined types are proposed: *transcription*, *translation*, *general notes* and *personal notes*. Click the save button.

Layer name	vic/ 300	nu anno	ation layer
My transcription 2	2014		
Layer type transcription	0		
save			

**Step 2:** After you created the layer, you will be given the opportunity to work on the layer. Click this link, and the usual object page will change to the following screen, with the following sections:

- List of available annotation layers for the file.

Click these layers to change the layer you want to work with.

- Box with information on the layer you are currently working on.
   It will also contain the possibility to retrieve all annotations for this layer.
- Thumbnail index of the movies/sounds in the set, with current movie or sound marked.

- The movie/sound itself and below a black box where your annotations will display when you watch the movie or listen to the sound recording.
- The area to enter new annotations to the movie or sound layer.



**Step 3:** Start annotating the movie or sound (see next section).

### 8.3.2 Annotating a movie/sound (and deleting a layer)

Once you have created a layer to a sound or movie file, you need to move to the annotation-working interface. You can do this in 2 ways:

- browse to the object. Under the object you will see a list of available layers. Click the one you want to work on;
- browse to the object. In the <u>Annotations</u> box on the bottom-right hand side of the screen, you will see the same list of annotations with more details, and also a <u>red cross</u> to <u>completely delete a layer and all</u> <u>annotations</u>. Note that when you confirm deletion of a layer, the page

will not immediately reflect this change, even though the layer has been permanently deleted. To check this, you can simply reload the page by clicking in the thumbnails bar again the object you are already watching.

Once you have clicked the name of the layer in which you want to annotate, the screen again changes to the one displayed in section 8.2.1). You can now start annotating, but note the following important point:

Even if your browser displays "play", "stop" and "pause" buttons just below or in your movie our sound file, NEVER USE THESE, but always use the provided blue start and stop buttons. This is important, since it is the blue start and stop button that calculate the time code in which you will annotate.

To annotate, proceed as follows:

- 1) Click the start button.
- 2) Click the **stop** button at the moment where you want to start annotating something.
- 3) Write the annotation in the text field
- 4) Click the **save** button (you will receive a confirmation)
- 5) Restart the procedure at point one for the next annotation and so on.

Once finished, you can check the result.

- Click the Reload the list link.
- Click the blue play button
- Watch how the annotations will display at the right time in the black box below the movie/sound.

In the current layer information box, you will now also see a link called See all annotations for this layer. If you click this link, all annotations of the movie/sound will be listed.

- Clicking the red cross will delete an annotation
- Clicking the number next to the annotation will move the movie/sound to this

Movie(s)	ID 90903		
File	lamap-2011-02-08_02_port.mov		
Layer	My transcription, 2014		
Туре	transcription	transcription	
Owner	Laurent Dousset		
See all a	nnotations for this layer		
× 0 × 1	<ul> <li>My first annotation</li> <li>My second annotation</li> </ul>		

particular time. The number is the rounded time code as 1000 x milliseconds.

## 8.4 Text annotations

An annotation is a text of any type that has as reference to the current object. It can be a description that goes into more details than the basic meta tags described before, it can be a personal memo for yourself in your research, or it can be a discussion between you and a colleague about the interpretation of the object.

#### 8.4.1 Add a new text annotation

To enter a new text annotation, click Add a text annotation in the Actions menu.

The first line indicates the *author* of the annotation. You only need to fill this in if you are not the author. There may be cases where you want to enter the comment someone else than yourself made on the object.

The second line is the *title*. Make it short but descriptive, so that you can later easily understand what your annotation is about. The third field takes the annotation itself.

Author(s)			
Title			
Some comment, ext, explanation			
Access	Access open: •	Access restricted: 🔘	
	save		cancel

<u>Note</u>: By default, the option <u>Access open</u> is selected. This means that everyone that visits the website can see your annotation, even if the visitor has no rights to see the object itself. If you click the option <u>Access restricted</u>, then only you, and not even other registered users can see the annotation.

Don't forget to click **Save** to make sure your annotation is recorded.

# 8.4.2 Viewing, editing, deleting and answering a text annotation

Once you have entered an annotation (see 8.4.1), the main screen of the object will

change to display your annotation in the Annotation box.

- Click edit to change your annotation
- Click delete to delete your annotation (note that if someone has replied to your annotation, then you cannot delete yours as long as this person has not deleted his or her reply first).
- You can reply to this annotation and engage a discussion with the author clicking the answer link.

The screen extract on the right shows a fake example of the kind of discussions that could take place. I have left a short annotation, then John Quickdarrel as answered telling me I was wrong. I have then published an erratum.

Auth	or(s) Laur	rent Dousset	
Date	201	4-11-11/2014-11-11	
My f	irst annotatio	on	
This	is my annota	tion text	
			[ edit ] [ delete ] [ answer
	Author(s)	John Quickdarrel	
	Date	2014-11-11/2014-11-11	
	I do not ag	aree with your annotation	
	this is the	reason why I think	
	this is the	reason why I think	[ edit ] [ delete ]
L.	this is the	reason why I think	[ edit ] [ delete ]
L.	this is the Author(s) Date	Laurent Dousset	[ edit ] [ delete ]
1	this is the Author(s) Date Erratum	Laurent Dousset 2014-11-11/2014-11-11	[ edit ] [ delete ]
I	this is the Author(s) Date Erratum Yes, I agree	Laurent Dousset 2014-11-11/2014-11-11 e with you John it should be	[ edit ] [ delete ]

# 8.5 Graphical annotations

Also see chapter Schemas at page 72.

With the graphical annotation tool, you can mark particular rectangular extracts or regions of your objects with text. You may later list all extracts of images or search particular extracts according to text you typed in the graphical annotation.

This tool is useful if you want to:

- be able to characterize particular parts of an image rather than the entire image
- be able to find extracts of images of a set that correspond to a particular search type

To add a graphical annotation:



- 1) Click Add a graphic annotation in the Actions menu.
- 2) The page will reload with the graphics tools. Move with your mouse over the image.
- 3) Click and drag a rectangle of the area you want to annotate
- 4) Enter the text in the field that describes the object (your annotation)
- 5) Click the save button
- 6) Restart with other areas of the image if you want to add more annotations.

To edit or delete a graphical annotation, move over the annotation and click the pencil to edit, or the cross to delete.

When you have finished annotating graphically the image, click the Leave the annotation interface link below the image.

#### The object page will reload with a new section in your Annotation box (bottomright).

	Graphic annotations	
dit graphic a Il graphic an	nnotations ] notations of set ]	
Author(s)	Laurent Dousset	
Coordinates	40% / 43%> 20% / 14%	
This is a spic	ler web	
Author(s)	Laurent Dousset	
Coordinates	67% / 41%> 27% / 20%	
Face 2, botto	m	
Author(s)	Laurent Dousset	
	54% / 44%> 20% / 12%	
Coordinates	54767 4476 2 20767 1276	

- To add more or delete or edit the annotations, click the Edit graphic annotations link.
- To see all graphical annotations of the set, click All graphic annotations of set. This will display all image extracts you have created.

Below these links are displayed your annotations. Note that the coordinates of the rectangles you have marked are in percentage, meaning that the numbers are applicable whatever the size and the resolution of the image, even if for some reason the resolution or size are decreased or increased. The annotations are therefore software independent.

#### Below is a screen extract of the list of all annotations of a set.

	Access	This is a spider web	Object(s) ID	23883
Ghiles			Object type ODSAS	Photographs/Pictures
0			Object type Zotero	artwork
REAL			Permanent URI	http://127.0.0.1:10011/object/23883
			Title	Photographies d'un rituel de graduation (Nimangki) à Lamap, Malekula, Vanuatu
			Author(s)	Laurent Dousset (Dousset, Laurent)
			Year/Period	2008
			Geography	Lamap, Malekula, Vanuatu ( Vanuatu/ Vanuatu)
			Publisher	ODSAS
			Set(s)	Photographies d'un rituel de graduation (Nimangki) à Lamap, Malekula, Vanuatu
Acc	Access	Face 2, bottom	Object(s) ID	23883
			Object type ODSAS	Photographs/Pictures
			Object type Zotero	artwork
			Permanent URI	http://127.0.0.1:10011/object/23883
			Title	Photographies d'un rituel de graduation (Nimangki) à Lamap, Malekula, Vanuatu
		Author(s)	Laurent Dousset (Dousset, Laurent)	
			Year/Period	2008
			Geography	Lamap, Malekula, Vanuatu (Vanuatu/Vanuatu)
			Publisher	ODSAS
			Set(s)	Photographies d'un rituel de graduation (Nimangki) à Lamap, Malekula, Vanuatu
	Access	Face 1, top	Object(s) ID	23883
			Object type ODSAS	Photographs/Pictures
			Object type Zotero	artwork
			Permanent URI	http://127.0.0.1:10011/object/23883
and a			Title	Photographies d'un rituel de graduation (Nimangki) à Lamap, Malekula, Vanuatu
			Author(s)	Laurent Dousset (Dousset, Laurent)
			Year/Period	2008
			Geography	Lamap, Malekula, Vanuatu ( Vanuatu/ Vanuatu)
			Publisher	ODSAS
			Set(s)	Photographies d'un rituel de graduation (Nimangki) à

The ODSAS software creates a table of contents of all image extracts you have annotated graphically. This can be useful for comparative research, for example on masks... Or you could also use it to name peoples' faces.

## 8.6 Links to other documents

This is a tool to link different objects of the same set, of the same collection or even of different collections to one another. For example, you may want to link a page of your notebook with a particular photograph.

A link is qualified: it must have a text, or at least a title that explains what the link is about or why you have created this link. You may link as many objects to one

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another as you wish.

To create a link from the current object to another object:

- 1) Click Link to other documents in the Actions menu.
- 2) A list of collections will appear. Select the collection by clicking the Expand button.
- 3) A list of the sets of the collection you have selected will appear. Select the set by clicking its **Expand** button.
- 4) The list of objects in the set will appear. Moving over the thumbnails will enlarge them for better selection.
- 5) Check all documents you want to link to the current object (note that you can expand and retract and select all collections and sets and check as many objects from different sets or collections you want).
- 6) Move to the bottom of the page and click the save button.



After saving, your object page will reload with all the linked objects. However, you now need to qualify the links.

- 8) In the object page, check at the bottom-right the Links box.
- Click the pencil next to a link, enter the name and a description if necessary
- Click the save icon.

To delete a link, simply click the red cross.

To move from one linked object to another, click the **object ID** of each linked object in the Links section.

## 8.7 The image toolbar

Each object is accompanied by a toolbar that proposes a certain number of functions to graphically manipulate the object. These functions are self-explanatory and there is no need to go into great details. Simply note that the functions are cumulative: if you rotate and then turn the image to black and white, both will apply.

A few general notes:

-	The manipulations you undertake on the image are not physically inscribed in the image file itself. There is no danger, and you can always revert to the original file.	See/hide transcription of object Add the current object to your bookmars Add the current object to your showroom Revert to original image		
-	The save settings for	Rotate image		£5
	you are a registered	Flop image		
	user, you may click the	Turn to black and white	<b></b> →	•
	this, you will always see	Invert (positive <> negative)		
	this object according to the current	lighter	<b>&gt;</b>	8
	manipulations. For	darker	<b></b>	8
	was scanned	larger	<b></b>	9
	horizontally rather than vertically, you may	smaller	<b>•</b>	9
	rotate the image, then click the save button, so	save settings for this image	<b>,</b>	
	that you will always see it the right way.	save settings for all images of set	<b></b> →	
-	The save settings for all	save settings for all users		

**images of set** function: does the same as the save function but for ALL objects of the set. For example, if all objects of the set are too dark, you may click **lighter** first, and then **save all** so that all images of the current set are displayed lighter.

- The save settings for all users function: does the same as the save settings for image function but makes the image visible de way you modified it for all users, whether they are registered or not. The original image is not modified physically, but all users will see the image exactly the way you define it if saved with this button. This function is only accessible to the owners of the image.
- The flop function ("inverser" in French) allows you to flip and image that was scanned from the wrong side/surface.
- These modifications are only visible by you. Every user can have his or her own settings for every single object.
- Some functions, such as lighter, zoom etc. are incremental. You can click it several times to get higher values.

## 8.8 Transcribing documents

A transcription is understood as the literal rewriting of the content of an image into a text form. Transcriptions are very useful for your own work since you may then be able to:

- Search objects on their content
- > Export all your transcriptions as an RTF file and reuse it in other contexts

To transcribe a document:

- 1) Browse to the object you want to transcribe
- 2) In the Actions menu, click Add transcription; or in the meta-box, click the pencil next to Transcription.

This will open a new window that should (depending on your browser) enlarge to maximum size. The image itself will load in a size calculated for maximum comfort for transcription.

ODSAS Care Contractor Contractor	Igital Bources and Annotation System	Colline Digital Sources and Anoth Ven S
Transcripte the page into this form and in the builde to save save, save and quit Linguige: eye B Try OCK B J Y and [northoody - fortSor -   X Va Va Va Va Va · 2 ·	Treat	Notivez and mi des born
Pult p	Bornage (cf. pas a pe de Sommel)	Country on the burght " such " ploghe no works Training on anound fuil does reverse and Malance logist look. It Wars and winder de Alouse fin to the halow frances and winder de Alouse fin to the fail des des years and and de Alouse fin to the fail des des years in a content of the loover counter 1000, an elitere tense des loover counters. Can fait some place or trained winder and the solution of the solution is the patient of burger here on the deserver and the anound to Burger Alouse the one is anound the anound the solution of these

#### The screen is divided in two parts:

- LEFT:
  - The text field where you type the transcriptions, including some formatting tools.
  - The save button to temporarily save your transcription but continue working.
  - The save and quit button to save and go back to your object's main page.
  - The save and next button to save and go to the next object.
  - A link that allows you to try to automatically OCR the page (select the language of the document first). Note that this will only work more or less well with printed material. The result highly depends on the quality of the original.
- RIGHT:
  - The image that is to be transcribed.
  - If you move your mouse over the image, you will get a zoom to enlarge difficult areas (see image above).

## 8.9 Delete an individual object

If you are:

- the collection owner
- a GCM (General Collection Manager)
- an admin

you are allowed to delete individual objects. Please take care and make sure you know what you do. This action is irreversible!

The action will in particular delete:

- the original file
- the database entry of the object
- all related information such as annotations, meta-data, user definitions, graphical annotations, links to other objects etc.

To delete an object:

- ➢ Log in
- Browse to the object you want to delete.
- > Click delete in the location line just below the menu.
- > Confirm your intention to delete, read the result and then click continue



# 9 Schemas for graphical annotations

ODSAS allows the user to create customized schemas. A schema is a database-like definition of the structure of a document. This definition can applied to several objects in order to find and identify similar features. ODSAS schemas are TEI-like structures. TEI, the Text Encoding Initiative, has the objective to create a standard for the encoding of text. It uses an XML structure. ODSAS schemas are similar, but they also know two important distinctions:

- 1) They are completely user-defined, and every user can define several schemas for one and the same document series if they wish.
- 2) They are intended to enrich image annotation and structure images (be they images of text or photographs).

A schema can for example be (but there is not limit in what you can define/imagine)

- a list of keywords or features that I want to use and find through out my collections, for example all statues of temples, all animals pictured etc.
- the structure of documents such as emplacement of footnotes, page numbering, titles etc.

#### What is the advantage of having schemas associated to objects?

- The possibility to structure images, or to structure text-images before or instead of transcribing them.
- The possibility to search and display across many collections and sets parts/extracts of images that contain the same field of a schema
- The possibility to extract only those parts of images that have schema-fields associated to them.

#### Why are schemas useful?

- tools in ODSAS allow for listing, searching and extracting image parts you have defined through schemas. For example, if you define a schema with types of statues, and then annotate the images with the schema, you will be able to extract a list of all statues;
- tools in ODSAS allow for easy transcription or annotation of extracts of images you have defined, and allow you thus to only transcribe what is really necessary for your research for example.

#### A few preliminary notes and definitions:
- Every user can create their own schemas
- Every schema can be associated to a set or to several sets of objects or to entire collections
- Every set can have several schemas attached to
- A schema is tied to a particular user
- A schema can have as many fields as necessary
- You can create new fields of a schema on the run, even if you have already started using it in annotations. However, you can only delete fields of schemas that have not been used.

## General procedure to annotate objects with a schema (see below for more details)

- 1) Create a schema
- 2) Create fields in the schema
- 3) Associate the schema to collections and sets
- 4) Navigate to the objects and annotate the images using the schema

### 9.1 Create a schema

Log into your ODSAS account. In the menu My Space, click on Manage my Schemas. There you can either list your schema, list the schema of others if you would like to check the structure other users have created, and create a new schema.

Click on **Create a new Schema** and enter a name. As an example, we will create a schema to mark certain elements of a scanned page, but you can imagine all kinds of schemas, for example a schema that indicates elements of material culture, geographic places, people or animas etc.

In our example, we create the schema named *Photographic elements*, then we click save.

Name

Photographic elements



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## 9.2 Create fields in a schema

We now have to define fields (the elements of the structure of the schema) for our new schema. We start entering names of the fields in the Add new field form, select the type of data that is linked to it (if you are not sure yet, leave *string*), and then click the save button. The example below shows a few such created fields.

Fieldli	st of Schema			
٢	House	Type: String	save	Field is used in a graph annotation
۲	Garden	Type: String \$	save	Field is used in a graph annotation
3	Pigs	Type: String 🛟	save	Field is used in a graph annotation
3	Fishing	Type: String 🛟	save	delete
۲	Water	Type: String	save	delete
Add n	ew field		_	_
		Type: String \$	ve	

Note that you can change the name and the type of a field at any time, simply edit and click the **save** button next to it. Also, as long as a field is not used in an object, you can delete it. You may also add more fields to a schema even if you have started using it to annotate objects.

As you can see from the above example, we have here simply defined a list of features that could be present in a photograph. But imagine all kinds of fields. You are here completely free.

As you can see, some of the fields I am able to delete (click the delete button), others not. You cannot delete those fields that have already been used. If you want to delete these, you need to delete the graphic annotations first (see below).

If needed, we can now have a look at our schema under XSD/XML format. The XSD format-file is automatically created when you click the **Show XSD** link.

If you click on the eye left to the field name, it will print a page with all image extracts reflecting this field (only once you have actually annotated the images, of course, see below). The image below shows the result after having clicked the eye icon next to the field. The system has retrieved all extracts of images where I have defined this to be a member of the *Pigs* field. As an illustration, the image after the extraction list displays the full image of the first extract.



The full image of extraction 1 above:



## 9.3 Associate a schema to collections and sets

Page elements

To make our new schema available for annotation, we have to tell the system in which sets we want to use the schema for annotation. Under My schemas, click the small pen to edit the schema, then click on Link schema to sets. Note that you can link and unlink schemas from sets at any time (it is good to link schemas to other sets, it is probably a bad idea to unlink schemas).

The system will display all the collections and sets towards which you have owner rights.

- Click a collection name to expand the list of sets; click again to retract the list.
- Click on Select all sets of a collection to do just that, or on Unselect all to do the opposite.

One you have selected all sets in which you want to use the schema, click the save button on top of the list.

ct all sets k the nam e that you	to which you want associate the schema, then click the <i>save</i> button. Te of a collection to select individual sets. I can link as many schemas as you like to each set.
Collecti	on 1: Archives de chercheurs: Karel Kupka Archival Files
Select al	i sets of collection 🔿 Unselect all 🔿
Collecti Select al	on 2: Oceania - Pacific early books and writings Océanie - Pacifique: livres et textes ancien I sets of collection   Unselect all
	Set 4: Oceanie ou Cinquième Partie du Monde, tome 1, par Domeny de Rienzi, M.G.L.
	Set 5: Oceanie ou Cinquième Partie du Monde, tome 2, par Domeny de Rienzi, M.G.L.
	Set 6: Histoire des Colonies Françaises
	Set 7: D'Irlande en Australie. Souvenirs et Impressions de Voyage
	Set 8: Histoire des Navigations aux Terres Australes tome 1, Brosses, Charles de, 1709-1777
	Set 9: Histoire des Navigations aux Terres Australes tome 2, Brosses, Charles de, 1709-1777
	Set 11: Oceanie ou Cinquième Partie du Monde, tome 3, par Domeny de Rienzi, M.G.L.
	Set 12: Voyage autour du monde
	Set 471: Voyage de découvertes de l'Astrolabe. Botanique
	Set 598: A.M. Hocart: Windward Islands of Fiji (1902-12)
	Set 1343: Layard, John, 1942. Stone men of Malekula: Vao
	Set 1665: Imhaus E.N. 1890 Les Nouvelles-Hébrides (avec une carte et sept gravures)
-	

Once you have done this, your schema will be available for graphic annotation in your sets and objects.

## 9.4 Annotate objects using a schema

To annotate objects of a set using your new schema, navigate to the set in which you would like to structure images. Below is an example of an image file with text in which we use the schema we have defined.

1) Navigate to the object you want to annotate, then click Add a graphic annotation under the menu Actions. The page will change with your object on the left, and your schema and fields on the right:

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- 2) To graphically annotate your document using a schema, do this:
- Click the grey check icon field you want to use. The icon will change to
- Now move over the image and drag a rectangle around the part of the image that reflects the field you just choose (for example the pig). A text box will open. If you would like to, you could transcribe a text into the box or write any other comment useful to you. You can also not write anything and simply save as is, writing something later or, if you believe the field definition is enough (for example *Pig*), then simply leave it empty. Then click the save button.
- You will then see that the icon in your field list has changed to a green check icon

   meaning that you have used this field in your document. But note that you
   can reuse the same field on the same document if you wish, for example if there
   are several *Pigs* you want to distinguish.
- Then do the same with other fields, if applicable. Or leave as such. Note that you do not have to use every field for an object, and that you can use one field several times.
- You will see that little squares will remain on your image, showing you where your annotations are.
- You may then move to another object and continue annotating that way.

## 9.5 Using the schema feature to display your objects

So far, there are two ways to make profit of schemas. Others will be programmed with respect to users needs and wishes.

1) The possibility to display all extracts of images that reflect a particular field. For example, we could display all extract of objects that reflect a field called *subtitle* in a schema we have defined with name *Page elements*. To do this, navigate to any object and click next to the subtitle field elements on **show all**. Or, when you edit your schema, you can also click on the **eye** next to the field (see above).



As you can see, this function will extract from all objects the field that has been marked as being a member of the *subtitle* field during annotation. Of course, you could do this with personal faces, object types, animal species etc.

2) The possibility to show on one particular page and object only those extracts that have actually been marked with the schema. You may then also edit the annotation that goes with it directly in this screen. To do this, click on the Show objects as schema extracts link.

- Click the zoom icons to enlarge or reduce the images.
- Click the small pen to edit the annotation.



## **10 Showrooms**

As per version 3, owners of collections can create showrooms. A showroom is a place where you display a selection of your objects accompanied by some explanatory text. A showroom should be understood like an exhibition of your work or collection.



Example of my own showroom

## 10.1 Create your showroom

The first step is to create your showroom template.

- 1. Click Manage my Showroom in the My Space menu.
- 2. Fill in the form and click the save button.

You can always edit these details later.

The next step is to select a few objects you want to include in your showroom. Note that objects you select for the showroom will be visible by the public, even if they are part of a set that is of restricted access.

- 1. Navigate to the object you want to add to the showroom
- 2. Click the blue star 🔀 in the toolbar of the object to add it to your showroom selection

You can always add later or delete again objects from your showroom.

Once you have added a few objects, go back to Manage my Showroom in the My Space menu.

- Click on edit object(s) to add some description to each object (not compulsory, but will help visitors to understand). There you can click the pencil to enter a description, or click the red cross to delete an object from your showroom.
- Click on proceed to manual order if you want to change the order in which the objects are displayed in the showroom. To order the objects, simply click and drag them in the order you want them, then click the save button.

Your showroom, once created, will automatically be accessible from the ODSAS homepage.

## **11 Create a Special Collection/Subdomain**

[THIS MODULE IS STILL IN THE TESTING. MORE ITEMS / SUBFUNCTIONS WILL BE ADDED AS NEEDS ARE EXPRESSED]

It is possible to create a quasi-independent website presenting and discussing one or several of your collections. This possibility goes beyond the Showroom (see 10 at page 79) functionality, since it allows you to create several personalized pages presenting your collections. You could, for example, create Special Collections in the context of particular projects.

You can also use this module to describe your work, add your CV, your publication list etc. along the presentation of the collections, sets and objects you have archived on ODSAS.

These special collection websites are created using a simple home-made CMS (Content Management System). Once your collection is created, it can directly viewed at the following address:

https://www.odsas.net/subdomains/[your\_special\_collection\_name]

Moreover, once a special collection is stabilized, and if you wish so, it can also be turned into an independent and actual subdomain without loosing the functionalities. The URL will thus become:

http://[your\_special\_collection\_name].odsas.net

for example (an existing subdomain):
 http://newguinea.odsas.net

The module that allows you to create such a website is called "Special Collections" or "Subdomains". Special Collections are presented on the home page in the special collections tab. In the below screen shot of the home page of ODSAS, the existing special collections are *New Guinea Collection* and *Pierre-Adolphe Lesson*. Have a close look at both these special collections, since the CMS allows you to build something very similar for your own collections.



### 11.1 Create a special collection

Note that you can create, edit and delete a special collection at any time, and that special collections will only be visible by yourself until you decide to publish it.

To create a special collection, you need to be the owner of one or several collections on ODSAS.

- 1. Log into ODSAS. Under the menu My Space, click on Special Collections.
- 2. Then click My Subdomains to view and edit your existing special collections. Or click New Subdomain to create a new special collection through the CMS module.

Note: whenever you are editing a subdomain/special collection, you can always click My Subdomains to return to the list, and continue editing the content of your subdomain later at any stage. If, during the process, nothing seems to be happening or if the system is waiting for any unknown reason to you, simply click this link again to continue.

#### 11.1.1 Name your subdomain

- 3. One you have clicked on New Subdomain, you need to enter a *shortname* and a *full presentation name*. Be careful at this step and note that:
  - The *shortname* cannot have any spaces or special characters. They will be deleted. It should be lowercase and explicit. The *shortname* will be used as the subdomain URL.
  - The subdomain *full presentation name* is the title of your subdomain. This will also be the text used to create the link to your subdomain on the ODSAS homepage.

Examples are:

Shortname	Full presentation name
newguinea	New Guinea Collection

Pierre-Adolphe Lesson

Also note, that if a *shortname* already exists, the system will ask you to suggest a different name.

- 4. Select a language: *English* or *French*. NOTE: this functionality is not yet fully used, but it is wise to save this information now already. With the time, you will be able to create multilingual subdomains.
- 5. Click **Create Subdomain**. This will create all necessary files for your subdomain and prepare the template.

# 11.1.2 Choose the collections you wish to present in the subdomain

The next page will list all the collections you own. You can only create subdomains using your own collections.

6. Click every collection you want do display and discuss in this subdomain.

This is a showcase of a subdomain (6)
Please select or unselect the collections that belong to this Subdomain
<ul> <li>Archives de chercheurs: Karel Kupka Archival Files</li> <li>Oceania - Pacific early books and writings Océanie - Pacifique: livres et textes anciens</li> <li>Australian Aboriginal Picture Library</li> <li>Utopist narratives / récits utopistes</li> <li>Historical Maps / Cartes historiques</li> <li>Archives de chercheurs: Laurent Dousset: Vanuatu (Malekula, Efate, Port Vila) [Added]</li> <li>Archives de chercheurs: Laurent Dousset: Aborigines of the Australian Western Desert / Al</li> <li>Australian Archives and Texts</li> <li>Books and Archives on Malekula / Malicolo, Vanuatu</li> <li>The Fison and Howitt collection</li> </ul>
Edit contents of subdomain

7. Then click on Edit contents of subdomain. Note that you can always and at any time later add or delete collections from your subdomain.

#### 11.1.3 Edit the contents/structure of your subdomain

Every subdomain has the same structure. You may want to check this subdomain to have a general overview: <u>http://lesson.odsas.net</u>

- It has a maximum of 6 menu items, calling each a specific webpage. You do not need to have all 6 menus defined. You can only have 1 or 2 if you like. And you can add more menus (and pages) later.
- These menu-items can be illustrated with menu-images
- Each menu item has a corresponding contents page
- The subdomain has a header image and a footer image

While you will be able to add or change header, footer and menu images later if you wish, it is a good idea to prepare your files in advance. Have a look at the generic template layout on the right to understand the display.

- All images must have a resolution 72 pixels, be of the JPEG format and have the file extension .jpg
- If your images are larger or smaller than the below sizes, they will be rescaled automatically.
   It is wise to follow the instructions below to make sure the effect you want is reproduced.
- The size of the banner image must be 900 x 150 pixels.
- The size of the footer image must be 900 x 60 pixels (if you want to add copyright information, logos etc., please add these to your footer image when you work on the image).
- The size of menu images must be 80 x 80 pixels.

Once you have clicked on Edit contents of subdomain, you will find this screen:

The interface is not really user-friendly yet, but should be self-explanatory. You need to give each menu item you want to create a title, click save (and if you wish upload an image illustrating the menu).

The la	yout	
Banner i	mage (900 x	150)
Menu 1	Image (80x80)	Content English
Menu 2	Image (80x80)	
Menu 3	Image (80x80)	
Menu 4	Image (80x80)	
Menu 5	Image (80x80)	
Menu 6	Image (80x80)	
Footer in	nage (900 x 6	30)

#### Add your information here (check with the layout on the right)

If you do not need a menu or want to add it later, leave the Menu name empty.
 Note that if you upload images, you will not see them now. To check the images, click on 'My subdoi

Menu 1 name	Home	save	Menu 1 image:	Upload (new) image
Menu 2 name		savo	Menu 2 image:	Upload (new) image
Menu 3 name	<u>j</u>	save	Menu 3 image:	Upload (new) image
Menu 4 name	[	save	Menu 4 image:	Upload (new) image
Menu 5 name		save	Menu 5 image:	Upload (new) image
Menu 6 name	] 🦕	save	Menu 6 image:	Upload (new) image
Banner image:	Upload (new) image			
9 - 22	United Incold Income			

Below we will create 2 menu items. One, our homepage, presenting in text-form the collection, our work etc., the second will display the collection items.

- 8. In our example, we don't like the name of the first Menu, which is Home by default. We change it to Fieldwork in Vanuatu.
- 9. The second menu, we call in our example vanuatu Collections.
  10. We click save on both menus.

Now we want to add images illustrating our menu items. Note that these are not compulsory, but give your subdomain a more aesthetic touch, in particular if you try to find images that reflect you menu name and page content. For the first menu item I choose a map of Vanuatu, for the second the extract of an image from my collection.

- 11. Click on Upload (new) image to add an image to the menu. A new window will open, allowing you to browse on your computer for an image and then upload it. Once done (you will get a message), simply close this upload window and upload a new image if you wish.
- 12. For the moment, we don't see that anything has changed. To do so, click on the top on My Subdomains, and, next to the domain you have just created, click on edit and click the buttons at the end of each page until you get back to this one. You should now see your images (even though they are here displayed in a smaller size). If you want to replace menu images, simply upload (at any time) new images.



13. We don't upload footer and header images yet. We can do that later. But if you are ready, do it now. Then click on Edit webpages contents.

#### 11.1.4 Add content to the subdomain webpages

Because we have created 2 menu items, the system has prepared 2 webpages for us. For each of these pages you can now define whether:

 1 - the page has normal content you actually write. In this case, click on Normal text and edit the content. PLEASE DO NEVER copy-paste text from Word or OpenOffice, since this will carry a lot of junk into the page (even if you don't see it). If you want to format the text. click on Use texteditor. When vou have edited your text (and you can always edit later), click on Save content below the form. If you want to edit another of your pages, you will then have to navigate back to this page by clicking Μv Subdomains and so forth until you reach this page again.

Fieldwork in Vanuatu	Vanuatu Lugashite (Junap Lugash	This menu should be: • Normal text • Set list module
Vanuatu Collections		This menu should be: • Normal text • Set list module
Edit other features		

 2 - the page makes use of one of the existing modules. Note that so far, only one module has been created for subdomains. This module, called <u>Set list module</u>, will create a list with thumbnails of all the sets of the collections you have selected when creating or editing your subdomain. When the visitor clicks on the set name, they will be directly sent to the corresponding set on ODSAS. See below an extract of such a list.



In our example, I click **Normal text** for the first menu item (called *Fieldwork in Vanuatu*) and enter some text, then I click **Set list module** next to my second menu (*Vanuatu Collections*).

Click on **Edit other features** at the bottom to change color settings for your subdomain.

### 11.1.5 Edit other features

In this screen, you can personalize the look of your subdomain, this includes:

- Menu background color
- Wrapper background color (the wrapper is the background of your subdomain)
- Text Background color (in most cases you will want to leave this white or light grey)
- Link colors (the color of all your links in the subdomain).

More customizable items will be added later.

Click on a color in the color-picker rectangle, then click save next to each box if you changed the color.

lefine colors	Save(ed) color		Pick a color to change
Menu-Block Background Color		save	
Wrapper Background Color		save	
Text Background Color		save	
.ink Colors		savo	
Finish			

Click the Finish button to complete your subdomain.

### 11.1.6 The subdomain menu

You will now return to the subdomains list. Your subdomain should be listed with the following items:

- See This allows you to check your subdomain. Visitors don't see this subdomain, only you will, as long as you have not published the subdomain.
- Edit You can edit all items, features and content of the subdomain at any time. Just note that when editing, you will cycle through all the above-discussed

pages. If you don't want to change anything on a particular page, simply click the bottom-button to continue.

- **Publish** Once you are happy with your subdomain, you can publish it. It will then be listed on the ODSAS homepage as a special collection. If you would like to turn your Special Collection into a proper subdomain, get in touch with me and we will discuss the issue.
- Delete This will permanently delete all files and the database entries of your subdomain. Note that it will of course not delete the collections or objects on ODSAS.

## **12 The Digitization Management Interface**

This interface is in English only, and is accessible to administrators and GCM only.

The interface allows to:

- Manage digitization jobs
- Manage timetables of digitization jobs and construct automated Gantt charts
- Manage backup discs and their periodic rewriting

## 12.1 Digitization menu

MENU:	Administrati	ON OF PHYSICAL	JOBS AND DISCS												
Ne	w Job	List All Job	s List Fi	inished Jo	List Open Jobs Time Table	e All Jobs	Time Table Finish	hed Jobs	Time Table Open J	obs	Discs and Se	ts	List of s	lets	
CONTEN	п														
The foll	owing diego	ano moro tha	n 4 years old	and no	ad to be rehurned										
The tom	owing discs	are more that	ii + years olu	anu ne	eu to be reburneu										
The follo		are more tha	in 4 years old	and ne											
Disc ID	Disc Type	Disc Date	Age in years	Job ID	When you have reburned the disk, click the Done-link										
Disc ID	Disc Type DVD	Disc Date	Age in years 6.7	Job ID 35	When you have reburned the disk, click the Done-link Done										
Disc ID 30 33	Disc Type DVD DVD	Disc Date 2008-02-15 2008-02-15	Age in years 6.7 6.7	Job ID 35 35	When you have reburned the disk, click the Done-link Done Done										
Disc ID 30 33 34	Disc Type DVD DVD DVD	Disc Date 2008-02-15 2008-02-15 2008-02-15	Age in years 6.7 6.7 6.7	Job ID 35 35 35	When you have reburned the disk, click the Done-link Done Done Done										

New Job	Create a new digitization job					
List all jobs	List all finished and unfinished jobs					
List open jobs	List all jobs that are not finished. A job is considered finished when the material is online					
Time Table of all jobs	A Gantt chart to all jobs					
Time Table finished jobs	A Gantt chart of all jobs of which the material is online					
Time Table open jobs	A Gantt chart of all jobs that are still ongoing					
Discs and Sets	The list of all backup discs and their related sets					
List of sets	The list of all sets and associated job and disc identifications					

Below the menu you will see a **reminder list of backup discs** that are more than 4 years old and that therefore need to be rewritten. Once you have done so, click the **Done** link. This will reset the age of the disc to zero. Give the new disc the same id as that of the original disc.

### 12.2 Create a new job

As soon as you receive original objects to be digitized, you should create a new job. Please follow instructions precisely and fill in as much information as you can. You can edit certain aspects later on.

Some notes on specific fields:

- Job name: make it short but precise, for example: Dousset Fieldnotes 2011
- **Researcher name**: Who ever is concerned with the material (the owner, provider, originator, contributor...)
- **Owner id**. This is taken from the users that are already in the database. This field is not compulsory.
- **Type of originals**: select from the selection list. If your type is not available, enter it in the text box and it will become available for the next time.
- Estimate the number of originals.
- **Dates originals received** (follow the format). This is the date the job really starts.
- **Name of worker**: whoever or whatever company is doing the digitization.

Do not forget to click the Insert Job button.

bname:			
searcher			
wner id:	Choose an owner (if possible)		
pe of iginals	Choose an option 💲		
umber of iginals:			
ite iginals ceived yyy- m-dd):			
ame of orker:			

## 12.3 The follow-up and editing of jobs

To follow up and edit your jobs, you should use one of the list functions. For example click List Open Jobs.

ł	Johname	Reseracher	owner id	type of originals	number of originals	originals received	work started	work finished	repatriated	days worked	days passed	date online	waiting time	name of worker	disc
	V 4	~ ~	~ 0	V 0	V 4	V 0	~ ~	~ 4	♥ △	~ 4		~ 4		♥ @	
3	Pilade	Lesson	25	papier	424	2010-10- 01	2010-10- 04	2010-10- 08	*	5	5	*	1503	Sarah Teixier	G
ł.	negatifs Lemmonier		11	Monochromes	720	2009-05- 07	2009-05- 07	2009-05- 30	2012-05- 18		24	1	2015	Fablenne	(se
	Dessins topographique Baruya (mission 2)	Godelier Maurice	22	papier	72	2012-05- 22	2012-05- 22	2012-05- 22	*	1	1	*	904	-	
	Notes de L. Dousset - Activités scientifique et administratives 1996-2012	Laurent Dousset	1	papier	3000	0000-00- 00	2013-04- 23	1	1			1	735945		0
	Lemonnier PNG nåb	Pierre Lemonnier	11	Négatifs	2400	2013-11- 26	2014-03- 21	1	1	1		1	351	Cavallasca	C
1	Lemonnier PNC diapos	Pierre	11	Diapos	2203	2013-06-	2013-07-	2013-11-	2013-11-	32	129	1	512	Caroline	0

This will display a table with each job's information. Whenever you have done something, for example finished scanning, repatriated the original objects to the owner, uploaded the files to the ODSAS platform, you need to get to this interface and take some action.

Here some explanations:

- If a job name is green, it means it has been digitized but since the job is still open, the files have not yet been uploaded to the ODSAS platform.
- If a job is red, it means you are still digitizing the material.

It is very important that you do undertake the below actions the day you actually do the work. This will allow the system to calculate the estimated time needed for future jobs and construct the Gantt chart.

- When you start actually digitizing the material, click the green ok-sign of the job in the *work started* column.
- When you finished digitizing the job, click the green ok-sign of the job in the work finished column.
- When you have returned the original files to the owner, click the green ok-sign in column *repatriated*.
- When the material is uploaded and online, click the green ok-sign in the column date online.
- Click the **pencil** in the column *days worked* to indicate how many days you actually worked on this job.

• The disc icon allows you to associate backup discs to each job. Click the disc to associate backups. Click the see link below the disc to see which discs are already associated to a job.

## 12.4 Create backup discs

You should digitize the original objects in high quality and high resolution (see the ODSAS Digitization Handbook) and backup your original high quality scans on discs.

Procedure:

- 1) Scan and organize your files placing them in directories that will reflect the various sets that you will create from this material.
- 2) Make a copy (duplicate) of all the directories with the high-resolution files.
- 3) Convert one copy of these original directories/files to jpg or png, create the sets on ODSAS and upload the middle-resolution files.
- 4) Create the backup discs with the original high-resolution directories/files.

When backing up, take a note of the last and first filename you store on a DVD, Blu-Ray or hard drive and take a note of the set id that has been attributed to this set of files.

When you have finished your job, click on the **Disc** (see 12.3) to enter into the backup index register (see next page).

	DISCS F	DR THIS JOB				
elete isc	Disc type	Disc number	Set ID	First file	Last file	Set Name
•	BR	227	235	negatif_1978		Négatifs 1978
			236	negatif_1979		Négatifs 1979
			237	negatif_1990		Négatifs 1990
			238	negatif_2008		Négatifs 2008
			378	1987		1987
			379	1987_1988		1987-88
			380	87_88_boucherie_porcs		1987-88 Boucherie de Porcs
			381	87_88_mumu_anguilles		1987-88 Mumu Anguille
			382	87_88_piege_anguilles		1987–88 Piège Anguilles
			383	87_88_cuire_anguilles		1987-88 Cuire Anguilles
			384	1988		1988
			385	1988_dame_en_deuil		1988 Dame en Deuil
			393	baruya_1983		Baruya 1983
ENTER A	NEW DIS	C FOR THIS J	393 Ов	baruya_1983		Baruya 1983
Linter un	su anu a	ets, men ci	ick this but	INTE SAVE		
ext sug	aested	disc numb	er: 322			
Diag				Dise trans.		
Disc nu	mber:			Disc type: DVD \$		
		First File		Last file:		
Set id:		ruserue.				
Set id: [ Set id: [		First File:		Last file:		

The top box gives you information on already created backup discs for this job. The bottom box allows you to add additional backup discs for the job. Do not forget to click the save button at the top of the bottom box.

## 12.5 Timetables of digitization jobs

The timetable functions give you an overview of how much time a job takes, when it was started, when it finished. It is used to calculate statistics on the average time needed to digitize certain material, and will thus help you to tell people how long they will have to wait until their material is online.



- **Red** indicates the waiting period between the time the original material was received and work on it started.
- Light green indicates the time needed to digitize the material.
- **Dark green** indicates the moment when the files and sets have become available online.

## 13 What is needed to run ODSAS?

To run ODSAS, you need:

- A Linux box, for example CentOS 6 (latest stable version)
- Apache 2 webserver with PHP module (latest version)
- PHP 5 scripting language (or latest version)
- MySQL 5 (or latest version)
- 4GB of RAM, 8GB is recommended for higher performance
- 1To of disc space (but this really depends on how many files you will store).
- I recommend using Virtual Disc Management
- A fix IP number for you box
- A good network connection
- Root access to install additional software and tools

Recommended but not compulsory:

- Tesseract with Leptonica
- A security certificate for https protocol

#### 13.1.1 Run ODSAS on a particular port

If you want ODSAS to be served on a particular port and keep the default 80 port for another webpage, then configure your httpd.conf file and restart Apache.

Under the Listen section, add the new port. For example

Listen \*:10001

Under the Virtual Host section, add the following (make sure VirtualHosts are activated). For example

```
<VirtualHost *:10001>
DocumentRoot /var/www/virtualhosts/odsas3/odsas_httpd
<Directory "/var/www/virtualhosts/odsas3/odsas_httpd">
Options Indexes MultiViews FollowSymlinks
AllowOverride All
Order allow,deny
Allow from all
Options +Indexes
```

</Directory> </VirtualHost>

Restart Apache

#### 13.1.2 Other configurations

#### http.conf

You should be loading at least the following modules with apache in your httpd.conf file.

If not, install them before you install ODSAS (the particular name of the .so file may change, but the module must be here and uncommented (there should be many more modules, but these 2 are very important for ODSAS:

LoadModule	rewrite_module	modules/mod_	_rewrite.so
LoadModule	php5_module	modules/mod_	_php54.so

#### php.ini

Edit your php.ini file if necessary. Some of the basic and important values you should check are:

```
max execution time = 30
                                 (make sure it is at least 30)
max input time = 60
                                 (make sure it is at least 60)
memory limit = 128M
                                 (go up to 128, or even 256
                                 if you have enough memory)
display errors = Off
                                 (set this to off in production mode)
\log \text{ errors} = On
                                 (you can always check possible
                                 errors in the log)
file uploads = On
                                 (must be on !!)
upload max filesize = 5M
                                 (5 MB is a good value)
mysqli.max persistent = -1
mysqli.allow persistent = On
```

PHP modules that should installed (next to all and many others)

- ✓ exif
- ✓ gd
- ✓ iconv
- ✓ imagick

- ✓ mcrypt
- ✓ mbstring
- ✓ mysqli
- ✓ zip

### 13.1.3 Security

I do all I can to make ODSAS a secure document server. But one is never fully protected from malicious people and software. If you believe you have found a bug or a possible security issue, please advise me immediately.

You also need to protect your server machine in general. Here a few tips:

- try not to login as root, but use sudo instead.
- Use sftp and ssh rather than ftp.
- use a good firewall and do not hesitate to ban IPs in your IP table.
- If you can, install a security certificate on your server. If you do so after you have installed ODSAS, do not forget to change the SERVER\_PREFIX constant to https in the file ODSAS configuration file.
- I generally recommend installing fail2ban onto your server. It will help with banning automatically malicious IPs.
- logwatch is an excellent tool. It can send you daily mails with detailed reports on potential intrusions, disk space and other details. Don't panic when looking at all the unauthorized login attempts....sit down, think and act.
- Additionally you may want to install rkhunter. It is a good tool to detect malware and sends daily reports on possible problems.

A good overview for securing your server is here: https://www.digitalocean.com/community/tutorials/an-introduction-to-securing-your-linux-vps

## 13.2 Installation instructions

You will receive installation instructions with the code. I do not divulge more information here for security reasons.

## 14 ODSAS meta schemas

ODSAS produces data compliant with Dublin Core, in particular through its integrated OAI-PMH server. It however also has its own schema in which the data is backed up. These two schemas are presented below. Note however that with every new function in ODSAS, the schema is modified. Check back regularly.

The *Collection Schema* contains data on collections and their sets The *Object Schema* contains data on the objects, including annotations, transcriptions etc.

### 14.1 Collection Schema

```
<xs:schema xmlns:xs="http://www.w3.org/2001/XMLSchema"</pre>
attributeFormDefault="unqualified" elementFormDefault="qualified">
<xs:element name="odsas">
<xs:complexType>
<xs:sequence>
<xs:element type="xs:byte" name="version"/>
<xs:element type="xs:date" name="date"/>
<xs:element type="xs:string" name="provider"/>
<xs:element name="collection">
<rs:complexType>
<xs:sequence>
<xs:element type="xs:byte" name="id"/>
<xs:element type="xs:anyURI" name="uri"/>
<xs:element type="xs:string" name="name"/>
<xs:element type="xs:string" name="description"/>
<xs:element type="xs:string" name="owners"/>
<rs:element type="xs:byte" name="number_sets"/>
<xs:element type="xs:byte" name="number_sets_open"/>
<xs:element type="xs:byte" name="number_sets_restricted"/>
<xs:element type="xs:short" name="number_objects"/>
<xs:element name="sets">
<xs:complexType>
<xs:choice maxOccurs="unbounded" minOccurs="0">
<xs:element name="set">
<xs:complexType>
<xs:sequence>
<xs:element type="xs:byte" name="id"/>
<xs:element type="xs:anyURI" name="uri"/>
<xs:element type="xs:date" name="date_enter"/>
<xs:element type="xs:string" name="date_coverage"/>
<xs:element type="xs:string" name="name"/>
<xs:element type="xs:string" name="description"/>
<xs:element type="xs:string" name="subject"/>
<xs:element type="xs:string" name="language"/>
<xs:element type="xs:string" name="type_fr"/>
<xs:element type="xs:string" name="type en"/>
<xs:element type="xs:string" name="peoples"/>
<xs:element type="xs:string" name="countries"/>
<xs:element type="xs:string" name="authors"/>
<xs:element type="xs:short" name="number objects"/>
<xs:element type="xs:string" name="access_restrictions"/>
```

```
<xs:element name="coordinates">
<xs:complexType>
<xs:sequence>
<xs:element type="xs:float" name="longitude"/>
<xs:element type="xs:float" name="latitude"/>
</xs:sequence>
</xs:complexType>
</xs:element>
<xs:element name="transcriptions">
<rs:complexType>
<xs:sequence>
<xs:element type="xs:string" name="available"/>
<xs:element type="xs:byte" name="public"/>
</xs:sequence>
</xs:complexType>
</xs:element>
<xs:element name="relations">
<xs:complexType mixed="true">
<xs:sequence>
<xs:element name="link" maxOccurs="unbounded" minOccurs="0">
<rs:complexType>
<xs:sequence>
<xs:element type="xs:byte" name="set id"/>
<xs:element type="xs:string" name="qualifier"/>
</xs:sequence>
</xs:complexType>
</xs:element>
</xs:sequence>
</xs:complexType>
</rs:element>
<xs:element name="watermark">
<rs:complexType>
<xs:sequence>
<xs:element type="xs:byte" name="watermark type"/>
<xs:element type="xs:string" name="watermark_text"/>
</xs:sequence>
</xs:complexType>
</xs:element>
<xs:element name="digitization">
<xs:complexType mixed="true">
<xs:sequence>
<xs:element name="job" minOccurs="0">
<rs:complexType>
<xs:sequence>
<xs:element type="xs:string" name="name"/>
<xs:element type="xs:string" name="name_original"/>
<xs:element type="xs:string" name="researcher_name"/>
<rs:element type="xs:byte" name="owner_id"/>
<xs:element type="xs:string" name="type originals"/>
<xs:element type="xs:short" name="number_originals"/>
<xs:element type="xs:date" name="date_originals_received"/>
<xs:element type="xs:date" name="date_work_started"/>
<xs:element type="xs:date" name="date_work_finished"/>
<xs:element type="xs:date" name="date_copy_sent_to_owner"/>
<xs:element type="xs:date" name="date_online"/>
<xs:element type="xs:string" name="name of worker"/>
<xs:element name="backup">
<rs:complexType>
<xs:sequence>
<xs:element type="xs:byte" name="number_discs"/>
<xs:element type="xs:date" name="date"/>
<xs:element name="disc" maxOccurs="unbounded" minOccurs="0">
<rs:complexType>
```

```
<xs:simpleContent>
<xs:extension base="xs:string">
<xs:attribute type="xs:short" name="id" use="optional"/>
</xs:extension>
</xs:simpleContent>
</xs:complexType>
</xs:element>
</xs:sequence>
</xs:complexType>
</rs:element>
</xs:sequence>
<xs:attribute type="xs:byte" name="id"/>
</xs:complexType>
</rs:element>
</xs:sequence>
</xs:complexType>
</rs:element>
</xs:sequence>
<xs:attribute type="xs:byte" name="id" use="optional"/>
</xs:complexType>
</xs:element>
</xs:choice>
</xs:complexType>
</rs:element>
</xs:sequence>
</xs:complexType>
</rs:element>
</xs:sequence>
</xs:complexType>
</rs:element>
</xs:schema>
```

#### 14.2 Object Schema

```
<xs:schema xmlns:xs="http://www.w3.org/2001/XMLSchema"</pre>
elementFormDefault="qualified" attributeFormDefault="unqualified">
<xs:element name="odsas">
<xs:complexType>
<xs:sequence>
<xs:element name="version" type="xs:int"/>
<xs:element name="date" type="xs:date"/>
<xs:element name="provider" type="xs:string"/>
<xs:element name="object">
<xs:complexType>
<xs:sequence>
<xs:element name="id" type="xs:int"/>
<xs:element name="collection id" type="xs:int"/>
<xs:element name="set id" type="xs:int"/>
<xs:element name="filename" type="xs:string"/>
<xs:element name="filepath relative" type="xs:string"/>
<xs:element name="filepath absolute" type="xs:string"/>
<xs:element name="uri" type="xs:string"/>
<xs:element name="thumbnail" type="xs:string"/>
<xs:element name="filesize" type="xs:string"/>
```

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```
<xs:element name="filetype" type="xs:string"/>
<xs:element name="rank" type="xs:int"/>
<xs:element name="citation" type="xs:string"/>
<xs:element name="meta">
<xs:complexType>
<xs:sequence>
<xs:element name="meta id" type="xs:int"/>
<xs:element name="meta_author" type="xs:string"/>
<xs:element name="year" type="xs:string"/>
<xs:element name="title" type="xs:string"/>
<xs:element name="sequence type" type="xs:string"/>
<xs:element name="sequence" type="xs:int"/>
<xs:element name="location" type="xs:string"/>
<xs:element name="copyright" type="xs:string"/>
<xs:element name="object type odsas" type="xs:string"/>
<xs:element name="object_type_zotero" type="xs:string"/>
<xs:element name="coordinates">
<rs:complexType>
<xs:sequence>
<xs:element name="longitude" type="xs:double"/>
<xs:element name="latitude" type="xs:double"/>
</xs:sequence>
</xs:complexType>
</xs:element>
</xs:sequence>
</xs:complexType>
</rs:element>
<xs:element name="transcription">
<rs:complexType>
<xs:sequence>
<xs:element name="transcription id" type="xs:int"/>
<xs:element name="transcription owner" type="xs:int"/>
<xs:element name="transcription text" type="xs:string"/>
</xs:sequence>
</xs:complexType>
</xs:element>
<xs:element name="annotations">
<rs:complexType>
<xs:sequence>
<xs:element name="annotation" maxOccurs="unbounded">
<xs:complexType>
<xs:sequence>
<xs:element name="object id" type="xs:int"/>
<xs:element name="owner" type="xs:string"/>
<xs:element name="author" type="xs:string"/>
<xs:element name="date created" type="xs:date"/>
<xs:element name="date modified" type="xs:date"/>
<xs:element name="public" type="xs:string"/>
<xs:element name="title" type="xs:string"/>
<xs:element name="text" type="xs:string"/>
<xs:element name="answer to" type="xs:int"/>
</xs:sequence>
<xs:attribute name="id" type="xs:int"/>
</xs:complexType>
</rs:element>
</xs:sequence>
</xs:complexType>
```

```
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```

```
</xs:element>
<xs:element name="graphical annotations">
<rs:complexType>
<xs:sequence>
<xs:element name="annotation" maxOccurs="unbounded">
<xs:complexType>
<xs:sequence>
<xs:element name="object_id" type="xs:int"/>
<xs:element name="owner" type="xs:int"/>
<xs:element name="text" type="xs:string"/>
<xs:element name="left coord percent" type="xs:int"/>
<xs:element name="top coord percent" type="xs:int"/>
<xs:element name="width percent" type="xs:int"/>
<xs:element name="height percent" type="xs:int"/>
</xs:sequence>
<xs:attribute name="id" type="xs:int"/>
</xs:complexType>
</rs:element>
</xs:sequence>
</xs:complexType>
</rs:element>
</xs:sequence>
</xs:complexType>
</xs:element>
</xs:sequence>
</xs:complexType>
</rs:element>
</xs:schema>
```