

MICHAEL Platform

Editor's guide

Getting started

This document is only a part of the MICHAEL platform editor's guide. The content is intended to be browsable and included in the overall documentation, but here you only have the *Getting started* part of the documentation without the navigation links but in a convenient form for printing.

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Getting started

2005-04-04 / 2005-06-16

This part of the MICHAEL platform documentation contains what an editor must know in order to create and manage content in a MICHAEL database, using the MICHAEL production module. This is not a complete reference manual, more information is or will be available in other parts of the MICHAEL Editor's Guide.

To begin with, it is essential to read about the [concepts and terms](#) used in this documentation and in the platform. Then you will find instructions to use the most important functionalities of the production module: [connecting to a database](#), your [personal homepage](#) and [browsing the content of the database](#), including information on default folders in a MICHAEL production module.

You will find next two documents explaining how to create or modify records in the database. The first one gives [general instructions](#), the second one is about the [fields common to many record types](#) in the MICHAEL data model and database.

The last five documents give general information on the input form used for creating the five types of records in a MICHAEL database: [digital collections](#), [institutions](#), [projects or programmes](#), [products or services](#), and [physical collections](#). These are not aimed at providing guidelines for creating good records in a MICHAEL database, they only explain how the forms are organized and if there are special instructions to use them.

Concepts and terms

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The concepts and terms defined here are used throughout this guide.

MICHAEL platform

A set of software tools to create, store, manager and publish information about digital cultural heritage in Europe.

Production module

A part of the MICHAEL platform, the production module is responsible for the creation and management of data. A publishing module is also available.

MICHAEL database (or MICHAEL instance)

A MICHAEL database or instance is an XML database, managed with the production module, where information is stored and managed.

Editor

A person responsible for creating and managing content in a MICHAEL database. This guide is intended for editors.

Record type (or data type)

A kind of information in the database. The MICHAEL data model defines five entities, represented as five record types in the production module: digital collections, institutions, projects or programmes, services or products and physical collections.

Record (or document)

One entry in the database. It is an XML document containing information describing an object, whether it is a digital collection, an institution, a project or programme, a service or product, or a physical collection. A record is thus of a certain *type*.

Field

One piece of information within a record. Fields are stored using one or more XML elements and attributes.

Input form

A Web-based form for creating or modifying records in the database.

Folder

A container in a database. A MICHAEL database is always organized as a hierarchical structure of folders. Folders may contain records or other folders. A folder has a code (similar to a folder name on a hard disk) and may have a title in multiple languages.

Connecting to a MICHAEL database

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The MICHAEL platform is based on a Web architecture. It means that you will use its functionalities with the unique help of a Web browser such as Firefox or Internet Explorer, whether it is for searching contents or editing contents.

The production module stores its data within a *database*. In order to edit data, you first need to connect to the database, using a username and a password which has been given to you by a system administrator. Before using any functionality of the production module, you thus need to know three pieces of information :

- 1 The URL of the database
- 2 Your username
- 3 Your password

Once you have this information, you may proceed to connect to the database and work on data.

Login procedure

Predefined instance and language

In some circumstances, the URL will let you connect to a specific database using a specific user interface language. In such circumstances, you will get an identification form close to this one:



Selected instance: michael-uk * [?]

Username: * [?]

Password: * [?]

Selected language: en * [?]

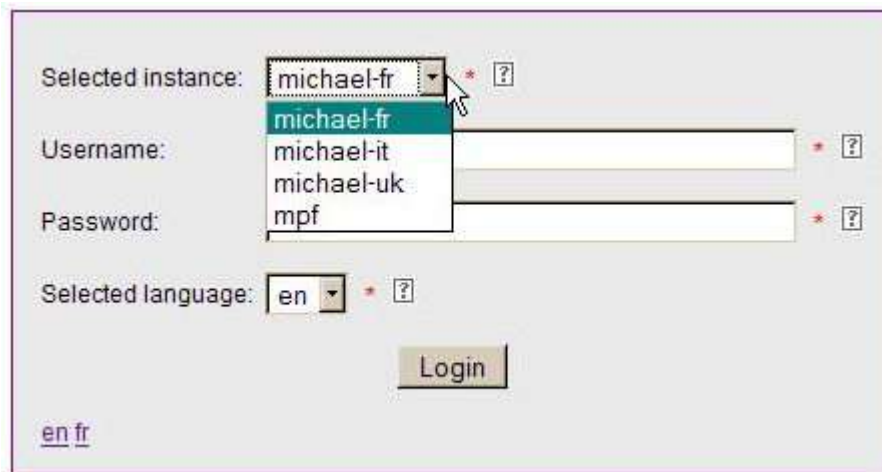
Login

[en](#) [fr](#)

In this form, you simply need to provide the correct username and password. If you provide wrong information, you will get the same form again (or the one explained in the following section). Once you click on the *Login* button, if your identification is successful, you will be redirected to your [personal homepage](#).

Generic login form

In some circumstances, you will get a generic login form, such as this one:



This form is use when the URL used don't provide specific information on the database and language, or when you just logged out or provided a wrong username or password.

To connect, you will need to provide four information. First you need to select the instance or database between all hosted instances in the list. Then you provide username and password, and finally the user interface language you want to use. Be careful, not all user interfaces languages may be appropriate for the database selected. Please stay with the information provided by your system administrator.

If you provide wrong information, you will get the same form again. Once you click on the *Login* button, if your identification is successful, you will be redirected to your [personal homepage](#).

Logout procedure

When you have finished working on the database content, you should log out of the system. If you don't use the production module for 30 minutes, you will be automatically disconnected, but we strongly encourage you to log out once you have finished working.

To do so, you must use the *Logout* link provided in the user interface. In your personal homepage, you will find a link at the top of the viewer area:



When you are browsing the content of the database, you will find a *Logout* button at the bottom of the page in your browser:



As soon as you click on one or the other, you are disconnected and you go back to the login form.

Personal homepage

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When you connect to the database, you are redirected to your *personal homepage*. This is a page containing links to important information or functionalities, and adapted to you. The standard homepage for editors of the MICHAEL production module will evolve in the future, and you will be able to add new items in it.

When you are browsing the content of the database, you can go to your personal homepage by clicking on the *Homepage* link at the top of the browsing window:



Your personal homepage contains two sections: *My queries* and *My shortcuts*.

My queries

These are *administrative queries*. They will always return 0 or more records, that you can afterwards edit and view, or browse to its containing folder. You execute a query simply by clicking on it.

My digital collections

All the digital collection records last edited by yourself.

My draft records

All the records in *draft* status last edited by yourself.

My institutions

All the institution records last edited by yourself.

My last records

All the records last edited by yourself within the last 7 days.

My physical collections

All the physical collection records last edited by yourself.

My projects

All the project or programme records last edited by yourself.

All my records

All the records last edited by yourself.

My records modified since ...

All the records last edited by yourself within the last n days, where n is asked in an input box when you execute the query.

My services

All the service or product records last edited by yourself.

My records with comments

Records last edited by yourself having text in the cataloguer's comment field (system metadata).

Records with comments

Records having text in the cataloguer's comment field (system metadata).

My records due for update

Records last edited by yourself where the review date is today or before.

Records due for update

Records where the review date is today or before.

Digital collections without any link

All the digital collection records not containing at least one link.

Draft records

All the records in draft status.

Records not linked to digital collections

All the records (other than digital collections) that are not directly linked by a digital collection.

My shortcuts

There are currently ten shortcuts. Five of them let you go directly within the standard folder of the five record types. These are named *"Digital collections" folder, etc.*

The other five are shortcuts to directly create a record in its standard folder and using the default form. These are named *Create a new digital collection, etc.*

Browsing the database

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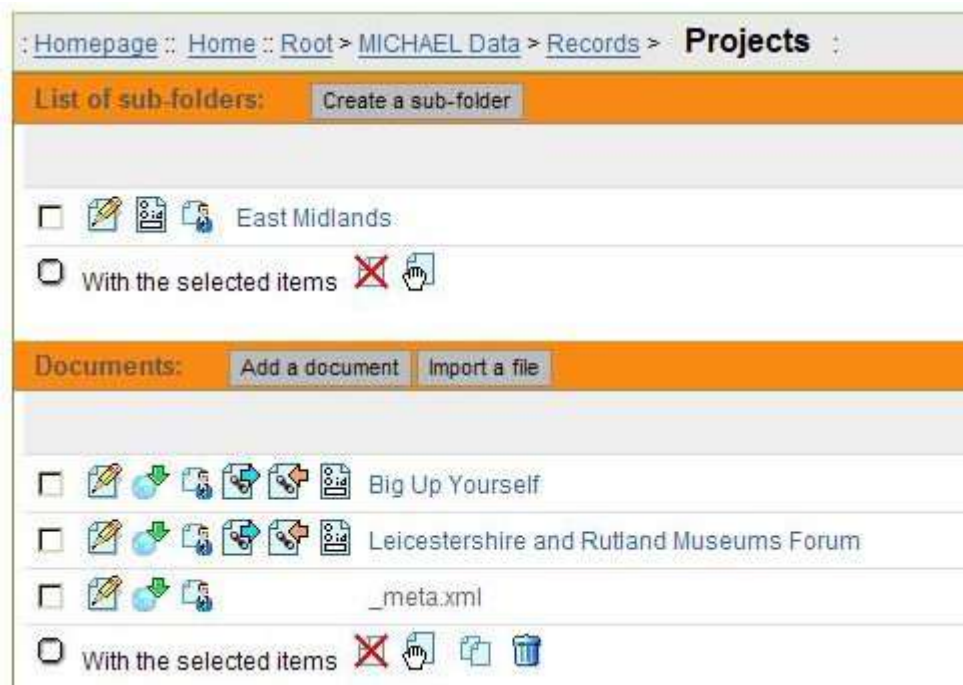
A MICHAEL database is organised with folders. An editor don't absolutely needs to create new folders, but he or she must know how to browse through folders and what are the default folders of a MICHAEL database.

Browsing through folders

In any MICHAEL database, there is a root folder containing other folders, themselves containing documents and other folders, etc. Browsing through this hierarchical structure is done largely like in Yahoo! or similar sites:

- there is always a *current folder*
- you go to a sub-folder of the current folder by clicking on its name in the list of sub-folders
- you go to a parent folder using the links in the hierarchy indicator

In order to browse quickly, you need to understand the general structure of the *viewing pane* in the MICHAEL production module. Here is an example viewing pane:



This viewing pane is visible in all pages except:

- when you are editing a form, whether for a MICHAEL record or for a specific functionality

- when you are in your personal homepage

This pane contains three zones, explained here from top to bottom:

Context

This zone first contains links to go to your personal homepage and to go to your home folder (not documented yet). Then you will find links to all the parent folders of the current folder, which give you the context of your current folder. This context is followed by the current folder's name. In the example above, the current folder is *Project*, contained in the folder *Records*, contained in the folder *MICHAEL Data*, contained in the root folder of the database. You can browse to any of these parent folders by clicking on their name.

List of sub-folders

You will find there a list of all sub-folders of the current folder. You can browse to any of these sub-folders by clicking on its name. In the example above, there is only one sub-folders, its name is *East Midlands*.

Documents

This third zone contains a list of all documents contained in the current folder. You can view the document by clicking on its name, you can modify it by clicking on the first icon to the left, the *Modify* icon.

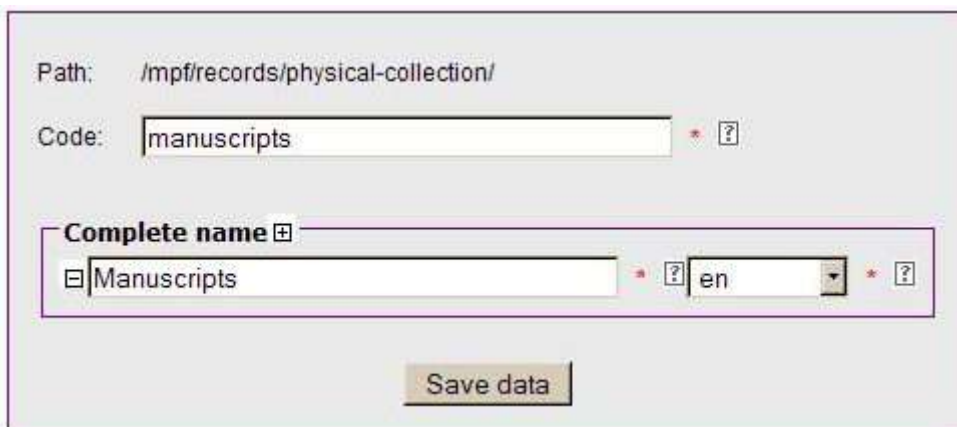
The `_meta.xml` file is a special file that contain the current folder's metadata; you can edit it to change the folder's name.

Creating a new folder and deleting folders

To create a new folder, first browse to the folder that will contain it. Once there, click on the *Create sub-folder* button before the list of current sub-folders:



You will then get a form to enter the code and the complete name of the folder:



The code must be unique within the current folder. **Please use only ASCII letters, digits, - and _ in your folder codes.**

The complete name can be defined for multiple languages, you should at least create a significant name for the default language of the user interface for your MICHAEL instance.

Once done, click on the *Save data* button and this will create the folder.

To delete a folder, just check the box in front of the folder name when you see it in the viewer and then click on the *delete* icon below the list of folders:



Be careful! By doing so, all folder content will be deleted, including sub-folders and their content!

Default folders of a MICHAEL database

A standard MICHAEL database has standard folders; in order to make sure that everything works correctly, the codes of these folders must not be changed. Please note that you can change the complete names of these folders if you wish.

In the following list of standard folders, we give first the path with codes, then with standard English complete names.

Code	Complete name	Description
/mpf	MICHAEL Data	All MICHAEL data, except lists.
/Lists	Lists	Lists used in forms.
/mpf/records	MICHAEL Data > Records	All MICHAEL records.
/mpf/slide-shows	MICHAEL Data > Slide shows	All MICHAEL slide-shows (feature not documented yet)
/mpf/records/digital-collection	MICHAEL Data > Records > Digital collections	All MICHAEL digital collection records
/mpf/records/institution	MICHAEL Data > Records > Institutions	All MICHAEL institution records
/mpf/records/physical-collection	MICHAEL Data > Records > Physical collections	All MICHAEL physical collection records
/mpf/records/project	MICHAEL Data > Records > Projects	All MICHAEL project or programme records
/mpf/records/service	MICHAEL Data > Records > Services	All MICHAEL service or product records

The shortcuts in your personal homepage work based on this standard structure of folders. Other structures would be possible with some simple customization of the platform.

Creating and editing records

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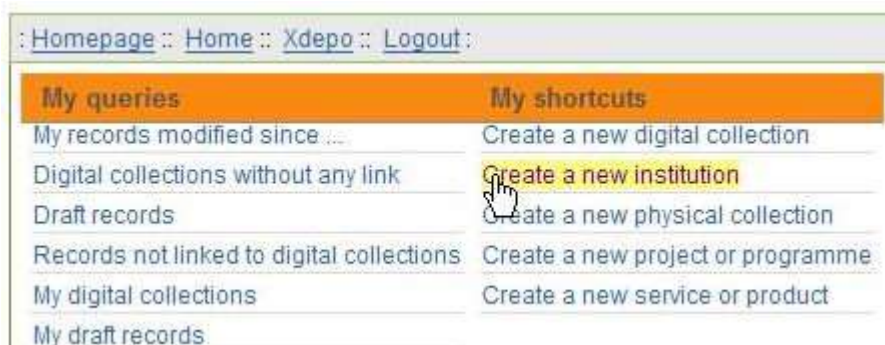
The most important task of an editor is to create and edit records for digital collections, institutions, programmes or projects, products and services, or physical collections. Specific input forms are available for these different record types, but it all starts with the same operations.

Before you need to create a new record, you must decide in which folder you will place it. Either you first browse the database to a suitable location, or you create it in the default folder and then you move it to the right place.

Shortcuts to create a record

Your personal homepage includes links to quickly create records. To use them, do the following:

- 4 Go to your personal homepage by clicking on the *Homepage* link at the top left of the browsing window.
- 5 Click on a link in the *My Shortcuts* section of the page.



These links will get you right to the appropriate form. The record thus created will be stored in the default folder for the record type you chose. If you follow the above example, you will open a input form to create a new institution, and the record will be stored in the `/mpf/records/institution` folder. You may, of course, move the record afterwards.

Normal procedure to create a record

The normal procedure to create a record is to first browse to the destination folder and then to create a new document in the interface.

- 1) Use the browsing feature of the application in order to make the destination folder as the current folder.
- 2) Click on the *Add document* button in the *documents* section of the browsing window:



3) In the following form, choose the right data type:

Only the last five entries must be used, they correspond to the five record types or entities defined in the MICHAEL data model.

4) The form will reload to let you choose an input form for this record type:

For now, only a *complete* form is available for all the data types.

5) The form will reload to let you choose a template for this input form:

Path: /mpf/records/

Data type: datatypes/michael-uk/digital-collection * ?

Input form: Complete * ?

Templates: Default * ?

Create the document

For now, only one *default* template is available for all forms.

6) Click on the *Create the document* button.

Once this process is completed, you will get the first screen of an input form for the selected data type. You can then proceed to enter data using the widgets explained later in this document.

Modifying an existing record

To modify an existing record, you need to browse to the location of that record, or to search for it. Once it is displayed in the *documents* part of the viewer, you can click in the first icon to the left of the screen, on the same line as the record you want to edit:

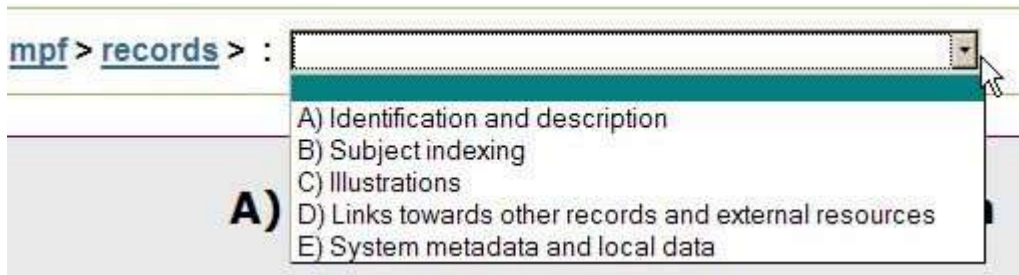


This will get you to the right input form for this record, and you will be able to modify the record.

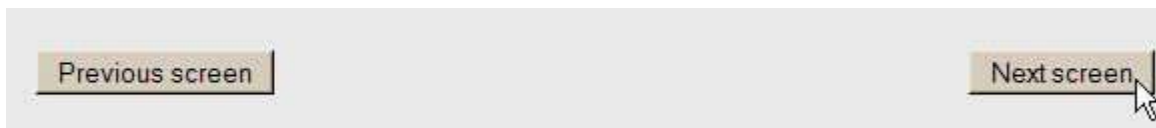
Using the input forms

The input forms used in the MICHAEL production modules are all divided in many screens, in order to get lighter pages and to ease the data entry process.

There are two ways to go from one screen to the other. You can use the drop-down list of screens available at the top of every form screen to go directly to any of the screens:



You may also choose the previous or next buttons located at the bottom of each screen:



In both cases, the screen currently being displayed must be valid before going to another screen.

In order to save a record, you absolutely need to go to the last screen of the input form and to click on the save button at the bottom of the screen:



Currently, this is the only way to save your modifications! So please be sure you do this before leaving the form by any mean!

Widgets

Input forms contain widgets. Widgets let you type or select information that will be stored in the database. In this section, we present all the widget types you will find in the various input forms, with explanations on how to use them.

Simple text zone



A simple text zone lets you enter text on a single line. In general, the size of input is not limited, although it can be in some cases. The input size is never bound by the visible part of the widget; text can be longer than the part visible.

Some fields are repeatable, although they contain free text. In such cases, you can add an occurrence by clicking on the + sign close to the field label. You can remove an occurrence by clicking on the – sign on the left of the corresponding text zone. The following figures shows such a widget:



Text area



A text area is not only a larger zone for entering free text, it will also let you create paragraphs within the text. Paragraphs are delimited by a carriage return. You may separate paragraphs with more than one carriage returns to ease the reading and writing, but multiple carriage returns are considered as only one paragraph delimiter.

Text are are never limited, you can enter as many text as you want.

Lists

Lists are widget that let you select one or more values. They can take many forms.

A simple drop-down list is as shown below:



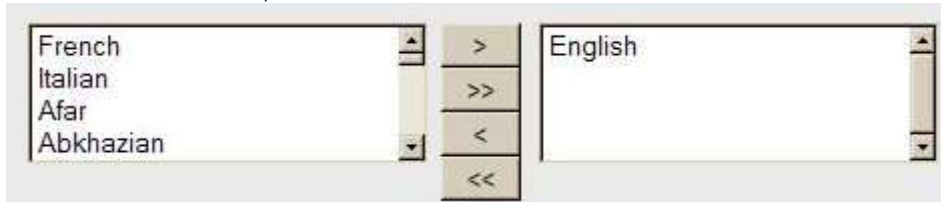
With these widgets, you can only select one value.

A multiline list looks like this:



In such a case, you can select more than one value using the standard Windows or Mac OS X keyboard shortcuts. For instance, under Windows, you add another value by holding the CTRL key while clicking on the new value. You can select many successive values by holding the SHIFT key instead.

Sometimes, multiline lists are not suitable since you can't see all the values selected, if the list is long. For such cases, you will use double lists, such as:



The left list contains all the values not selected; the right list contains the values currently selected. You can select a value by clicking on it in the left and then click on the > button in the middle. It will also work if you select more than one value on the left. The < button lets you remove a selected value; to do so, click on the value to remove on the right and then on the < button. It will appear again in the left list. The >> and << will let you add or remove all values. Please note that you can add or remove values also by double-clicking on them.

All the previous list widgets are for closed list. It means that you can only select a value from the list. Sometimes, you can also add some information not present in the list. To do so, you will use a double open list, such as:



The double list works as described before. To add values not in the reference list, use the text zone below and separate values with a semi-colon (;).

Calendar

To enter a precise, a calendar may be used, such as:

Review date of the record:

Record editorial status:

Agent:

Language of the record:

Comments on the record:

< April > < 2005 >

M	T	W	T	F	S	S
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8
<input type="button" value="Today"/>						

You can navigate the calendar and select the appropriate date.

Fields and widgets common to most forms

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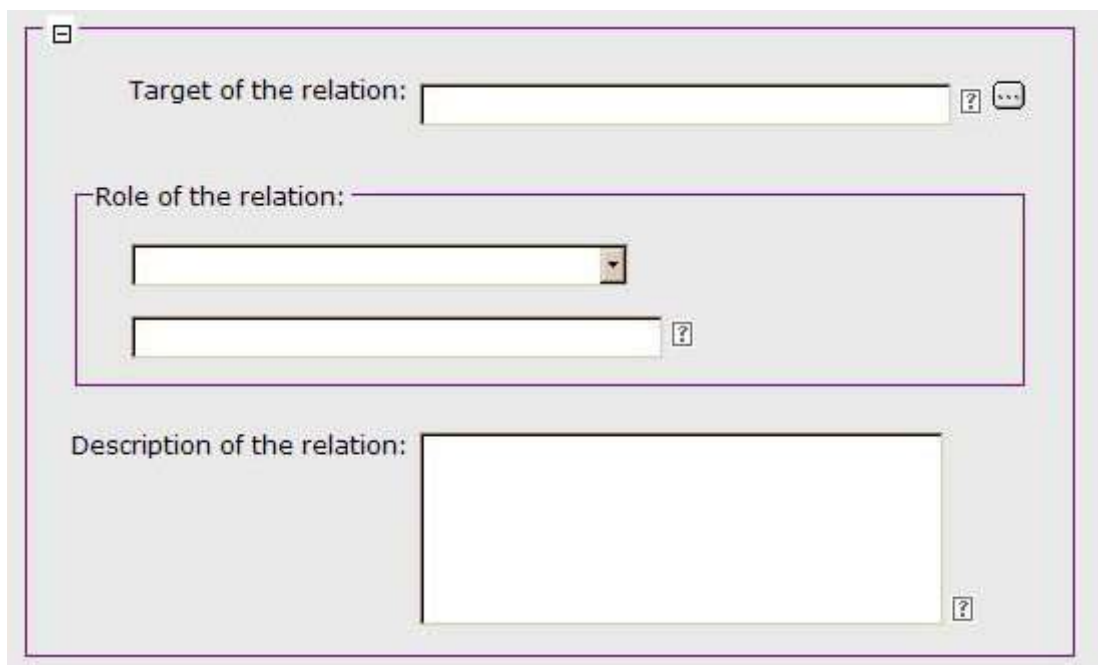
There are different input forms for each record type in a MICHAEL production module. Each form has its own set of fields filled in using specific widgets, but some fields and widgets are the same for all or most of the forms. We introduce these fields and widgets in this document.

Identifier

Whether the identifier is automatically assigned or is typed by the editor depends on your local configuration. In the case you need to provide an identifier (or part of it), **it is very important to use a unique identifier in the database**, among all records of any kind.

Links

Links are used to create relationships between records and to the external world. The form used to create a link looks like:



The screenshot shows a form with three main sections:

- Target of the relation:** A text input field with a question mark icon and a menu icon to its right.
- Role of the relation:** A container box containing a dropdown menu and a text input field with a question mark icon.
- Description of the relation:** A large text area with a question mark icon in the bottom right corner.

A link is expressed with three pieces of information.

Target

The target is either a URL when you create a link towards an external resource, or the identifier of record within the same MICHAEL database. See below for help on selecting an identifier. In most of the cases, this field is mandatory, although the form don't enforce it. See below for exceptions.

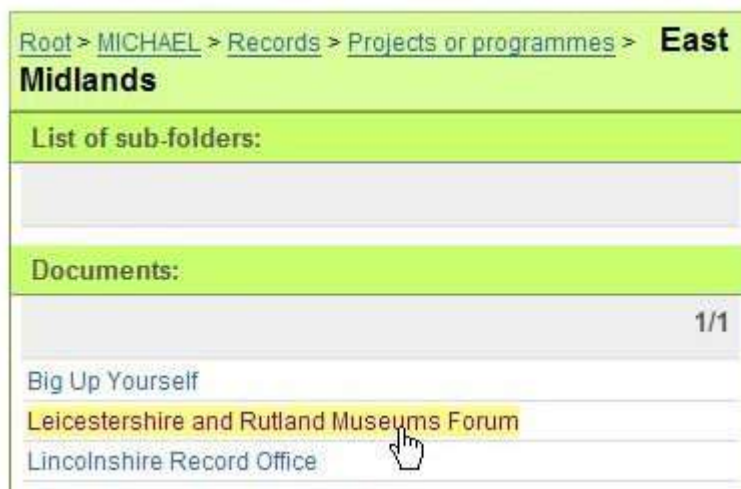
Role

The role is the type of relation or link you create. This is a very important field and it should always be used for usual links. See below for exceptions. The role is either selected in the drop-down list, or if you select the *Other* value you can add a new role in the text zone below.

Description

This optional field lets you add information about the link. This is useful if, for instance, the role does not explain completely or exactly why you create such a link.

When you create a link towards another record in the same database, you need to specify the identifier of the target record in the target field. To do so, it is easier to use the ... button on the right of the text zone. This will open a small window like this one:



This window contains a simplified browser of a database. You can browse through the folders, and whenever you select a document its identifier will be inserted in the target text zone.

System metadata

System metadata are part of all the input forms – always the last screen. They contain information that you cannot edit, such as the creation and modification date, and the username of the agent having made the last modification.

You can edit other fields that are explained here.

Review date of the record

The review date is an indication to help editors maintaining the data. It can serve as a reminder to know when to verify the accuracy of the information held in the record. Using this field is optional, but when you use it you should always specify a date in the future.

Record editorial status

The editorial status is either *Draft* or *Valid*. Only valid records can be published. Please also note that only users member of the *validators* record can change this field; for others it is always set to *Draft*.

Language of the record

This is the *cataloguing language*, not the language of the object described by the record. It defaults to the current user interface language, but it can be changed.

Comments on the record

These are internal comments, for editors, not for the public.

Digital collections

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Digital collections are at the heart of the MICHAEL system. It is thus not surprising to learn that they are the most difficult to describe, because they have a lot of descriptive fields and some of them are very specific.

Overview of the form

Digital collection records may be created with a form divided in five parts or screens:

A) Identification and description

Identifier and title form the *Identification* section. The description section contains fields for description, legal status, language, digital document format and type, content type, collection size and accruals.

B) Subject indexing

This screen contains fields for category, subject, period, culture, spatial coverage, famous people, place, event or item, and dates. Lists of possible values are provided for many of these fields.

C) Illustrations

In this screen, you may upload illustration of the digital collection such as a digital image.

D) Links towards other records and external resources

A very important section for the digital collection record, in order to build the relationship information at the heart of the MICHAEL data model.

E) System metadata and local data

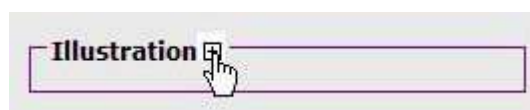
As for any record type, some system information is defined here.

Most of the information is contained within the first two screens.

Illustrations

In a MICHAEL database, only the digital collection records may contain illustrations. An illustration is a digital object that illustrates the digital collection described. Although the production module may handle any kind of digital data as an illustration, the MICHAEL publishing module handles only images in the common Web formats (JPEG, PNG, ...).

When creating or editing a record, you may have an empty list of illustrations. In that case, you may see something like:



To add an illustration, just click on the + button. Whenever you need to add a new one, click on that button again. In theory, there can be an unlimited number of illustrations added to a record.

An illustration is composed of four pieces of information.

Title

The title or legend of the illustration.

Author

The creator (photograph for instance) of the illustration.

Legal status

A statement about the legal status of the illustration.

Source files

The source or media files for this illustration, such as JPEG file. See below for more information on source files.

The part of the form used to fill in the first three pieces of information is very simple and looks like this:

The screenshot shows a form titled "Illustration" with a plus sign icon. Inside the form, there are four main sections, each with a plus sign icon and a text input field with a question mark icon:

- Title:** Legend of the illustration
- Author, photograph (creator):** The author of the illustration
- Legal status:** Some legal status
- Source files:** (This section is currently empty)

For the source files, you need to click the + button beside the *Source files* label. This will add a new group of fields. You may repeat to add more than one source file. The publishing platform will currently support two source files for images, one for a thumbnail and another for a full screen display.

Once you add a new source file, the form looks like:

Source files

File role: Thumbnail ?

Source file: Full screen Parcourir... ?

Format:

MIME type:

For each source file, you need to select its role – whether thumbnail or full screen – and you need to provide the file itself. To do so, click on the *Browse button* (the exact label depends on your browser) and select the file on your computer. Once you submit the form, the appropriate information for the format and MIME type will be added automatically. When you edit a record with an already provided image, you can replace it by clicking on the same button.

Images are store in the database, in a subfolder named *medias* from the folder where the record is.

Links

Links are very important for digital collections, because in the MICHAEL system all relationships directly involving a digital collection must be described in the digital collection record. Also, all records should be linked to at least one digital collection.

Institutions

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Institutions are quite simple records, but the input form used to create them has some specific features that need more information.

Overview of the form

Institution records may be created with a form divided in four parts or screens:

A) Identification and description

This screen contains the identifier, name, acronym, jurisdiction, administrative status and institution type.

B) Institution address

Complete information for contacting the institution can be provided: address (divided in small pieces of information), phone and fax number, URL, email, contact person.

C) Links towards other records or external resources

Links towards other records, such as a larger parent institution. Do not use this linking mechanism to store the institution online address.

D) System metadata and local data

As for any record type, some system information is defined here.

Address

The institution address may be the most specific part of an institution record, and provides important information. In general, this part of the form will have been customized for a specific instance of the MICHAEL production module.

Typical customization include:

- Patterns for valid content such as postal codes.
- Various level of regional information, such as *départements* in France or *Devolved administrations* in United Kingdom.
- Special behaviour when selecting an information: for instance, when selecting a county in UK, it can automatically select the appropriate region and devolved administration.
- Specific lists of regions, départements, counties, provinces, etc.

You need to pay attention to these specific behaviours and rules, but for more information you should contact your system administrator or read a specific guideline for your instance.

Programmes and projects

2005-04-04 / 2005-06-16

This record type can represent either digitisation programmes or projects.

Overview of the form

Project or programme records may be created with a form divided in five parts or screens:

A) Identification and description

In the identification section, you will find fields for the identifier, a link to a logo, a title and an acronym. The description section contains the description itself, along with information on the digitisation process and the funding sources.

B) Communications and Status

Communications include information such as phone and fax number for the project. Status is about the start and end date of the project, along with its completion status.

C) Links towards external resources and other records

The links for projects or programmes let you create relationships with other larger programmes or projects, towards a responsible institution, etc.

D) System metadata and local data

As for any record type, some system information is defined here.

Nothing in the input form is specific for projects and programmes.

Products and services

2005-04-04 / 2005-06-16

Products and services are the same record type in the MICHAEL system.

Overview of the form

Product or service records may be created with a form divided in five parts or screens:

A) Identification and description

Identifier and title form the *Identification* section. The description section contains fields for description, language, maintenance, legal status, etc..

B) Access and location

Access is about access type, accessibility, WAI compliance level, access conditions and technical requirements. Location lets you provide an online location.

C) Links towards other records and external resources

Links may be created to store a relationship with an institution responsible for the service or which has created it.

D) System metadata and local data

As for any record type, some system information is defined here.

Most of the information is contained within the first two screens.

Location

Location plays an important role for an online resource. Typically, it will contain the URL address, for a Web site for instance.

You may add many locations to one service or product record. For each location, you can provide two pieces of information:

Description

The description is a simple explanation for the location, particularly useful when you have more than one location. It can contain, for instance, a statement such as *South-American mirror site*.

Address

The address is usually a URL. Please note that a valid URL should be provided, including the leading `http://`.

Both fields are optional.

A location may also contain information to obtain a product not available online. For instance, you can store information in how to purchase a CDROM. In this case, use the description field.

Physical collections

2005-04-04 / 2005-06-16

Physical collection records provide information on the sources of a digitisation project. They are simple records, since the focus of MICHAEL is on digital collections.

Overview of the form

Physical collection records may be created with a form divided in three parts or screens:

A) Identification and description

This is the main section, with all information except the links and system metadata.

B) Links towards other records and external resources

Links can be use to create relationships with owning or responsible institutions, other parts of the physical collection, etc.

C) System metadata and local data

As for any record type, some system information is defined here.