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Online guidelines (wiki) in Memorix Maior

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Revision History

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Instruction for editing daguerreotypes in Memorix Maior

Go to: https://maior.memorix.nl

Log in with Customer code ‘dag’ and enter your User name and Password.

Select language English. This means the field names will be displayed in English.
Select Collection Management.

For adding a new daguerreotype to the Daguerreobase, Click the name of your institution and select Daguerreotype. When the characters are bold it is selected.
Next, click button New.

The form for editing a daguerreotype shows up. The fields marked with * are mandatory. Please note that you are allowed to leave all other fields (without *) empty.
Instruction for filling in the fields

**Form:** select *simple*.

**Collection:** this field is not mandatory. You can use this field for a collection of daguerreotypes made by one creator or another type of collection.

For a new collection, choose *Add record*. 
The following form shows up.

- **Published**: tick the box when you wish the record (Collection) to be published on the Daguerreobase website and on Europeana.

- **Language**: choose your language. Please note that this applies to the language of your metadata. It is not related to the language of the field names or the application. Furthermore, please note that we currently display only the English language SKOS lists, because the translation is incomplete.

- **Script**: Latin is the default script

- **Identifier**: fill in the code for the collection. An example of the preferred code is: NL-INS-RENS. NL is the standard two-letter code for your country. For example: NL = the Netherlands, HU = Hungary and FR = France. The three-letter code INS stands for Institution. For a private collection, the code is PRI. The last four-letter code stands for the collection. For example, the collection Carl Rensing, RENS are the first four letters of the surname. Please note that this is not a mandatory field. If you can’t or don’t want to enter a code here, leave the field empty.

- **Description**: information about the collection. This is free text.
Provenance: the provenance of the daguerreotype. A short description which way the daguerreotype came in the collection. This is not mandatory, so only fill in if you have this information.

Acquisition: for example: purchase or donation

Url: a relevant website, for example about the maker of the daguerreotype or the depicted person(s).

Click Save and close the window.

The collection is saved and shows up in the simple form.

The record for a Collection has to be made only once. For another daguerreotype in the same collection, select Choose record.
When you edit more records one after another in the same collection, you can use the button *copy from the previous record*. This functionality will allow you to work faster, because certain fields will be copied from the previous record.

For disconnecting a collection from the record, click *Disconnect*. 
Back to the fields in the Simple form.

**Published:** Tick the box when you wish the record to be published on the Daguerreobase website and on Europeana. This box allows you to save a draft version of the record before publishing it.

**Language**: choose your language. Please note that this applies to the language of your metadata. It is not related to the language of the field names or the application. Furthermore, please note that we currently display only the English language SKOS lists, because the translation is incomplete.

**Authorisation on image**: The website of Daguerreobase will give information about the Creative Commons licenses.
**Identification**: a unique code or inventory number which is used within your collection. For example: REN-15. Every content provider can fill in the code which is already in use in the institution. The number has to be unique within a particular collection in your institution. For example: REN-15 and DIV-15. The number 15 in combination with the three-letter code for the collection, makes it a unique identification.

**Dating**: fill in as: dd-mm-yyyy. If you do not fill in dd and mm, it will be recorded as 00-00-yyyy. If the date is unknown, don’t enter anything.

**Number of plates**: for example: 1. This field is not mandatory.

**Stereo plates**: tick the box for yes if applicable.

**General remarks**: free text. Only fill in when you have additional information.
**Style type**: choose the type in the list. If you are not sure, please look it up on the internet or in literature. We will add images and descriptions to the manual which will help you choose the correct types later.

**Title**: Only fill in when an official title of the daguerreotype is available. Otherwise leave empty.

**Image description**: free text for a description of the image. For example: Portrait of a woman in black dress, sitting on a chair

**Tags**: fill in a keyword. For more keywords, click the button (arrow) Add behind this field.

There is no list with controlled terms. By entering tags, the list will grow. The field will use auto fill, which means that when you type the first letters of a term, the field will suggest terms that were used before. In this way the list of terms will be controlled.

When you fill in a new term, use the plural form (not child, but children). Also you can use multiple keywords, for example botanical gardens.

See for example the Arts and Architecture Thesaurus by the Getty Research Institute.
**Subject name:** the name of a person or object depicted in the image. For example: Blom, Justina (surname, first name) or Windsor Castle. For more Subject names, click button (arrow) Add behind this field.

**Subject location:** the location depicted in the image on the daguerreotype. This field is not mandatory, so only fill in when the location is known. Point at the button next to the field and select Choose value.

Example: Subject location is city of Rotterdam. Enter Rotterdam in the search field. The following list shows up with four columns. The first column (Name) contains the value you are looking for (the lowest level); the second column shows the highest level (Country); the third column shows the first lower level (province); the fourth column shows the second lower level (municipality).

Choose the correct line. In this case: Name: Rotterdam (city); Country: Netherlands; Administrative level 1: South Holland (province); Administrative level 2: Gemeente Rotterdam (municipality).

After choosing the correct line, the field Subject location contains the following information:
When you save the record, the field Subject location will contain only the name of the location you were looking for, in this case: Rotterdam. If the next record you are editing has the same Subject location you can click the button *Copy from the previous record*.

**Inscription:** original inscriptions on the daguerreotype (see below for an example). Type over the complete text in this field. When (part of) words are not clear, use [...] instead.

**Links:** relevant websites for this daguerreotype.

**Creator:** the field for creator shows five buttons. The left button is for adding more creators. The field will be repeated.
The second and third buttons (arrows) is for positioning a creator in a higher or lower level in the record. The most important creator must be on top.

The trash can button is for deleting a creator

The most right button, toggle, is for unfolding the Creator form.
By clicking **toggle** the form will unfold (see below). By clicking **toggle** again, the form will fold in.

For adding a new creator, click the button **Add record**.

The following form shows up.
Language*: choose your language. Please note that this applies to the language of your metadata. It is not related to the language of the field names or the application.

Script*: Latin is the default script.

Nationality: choose in the list.

Name*: name of the creator. Fill in as: surname, first name

Parallel names: not mandatory. Only fill in if known.

Standard names: not mandatory. Only fill in if known.

Other names: not mandatory. Only fill in if known.

Corporate identifier: a unique code for a creator in a collection. Corporate identifier is for a group of persons or organisation. Identifier is for one person.
Example: CRE. This is an identifier for creator Carl Rensing. C stands for the first character of his first name and RE stands for the first two characters of his surname.
Please note that this is not a mandatory field. If you can’t or don’t want to enter a code here, leave the field empty.

Identifier: see corporate identifier.

Date of existence start: dd-mm-yyyy. Not mandatory. Only fill in if known.

Date of existence end: dd-mm-yyyy. Not mandatory. Only fill in if known.

Date existence source: not mandatory. Only fill in if known.

Active date start: dd-mm-yyyy. Not mandatory. Only fill in if known.

Active date end: dd-mm-yyyy. Not mandatory. Only fill in if known.

History: free text. Not mandatory. Only fill in if known.

Places: not mandatory. Only fill in if known. Click Choose value

This is the same application as used for Subject location. See instruction for that field.
Be careful when you have selected a place and want to continue with the form for creator. Click the button Back. Do not click the button for closing the window (white cross). In that case you will go back to the simple form, without saving the form for creator.

If the next record you are editing has the same information for Places, you can click the button Copy from the previous record.

**Function:** not mandatory. Only fill in if known.

**Places other:** not mandatory. Only fill in if known.

**City:** not mandatory. Only fill in if known.

**Postal code:** not mandatory. Only fill in if known.

**State region:** not mandatory. Only fill in if known.

**Telephone:** not mandatory. Only fill in if known.

Click Save and close the window.

The creator is saved and shows up in the simple form.
Next step is to select a role for the creator. Choose from the list.

**Window size**: HxW

**Window shape**: select in the list

**housing size**: HxWxD

**Housing shape**: select in the list

Frame
Case
Covering Glass
Mat
Backing

**Image Information**

Like **Creator**, the fields for **Frame, Case, Covering Glass, Mat, Backing** and **Image information** can be unfolded by clicking the button **toggle**. These fields contain SKOS lists which will be available in several languages in the future. Select a value or leave empty. These fields are not mandatory.

Please note that – for technical reasons – the SKOS lists have been integrated for materials, shapes, and colours. This means that you may find materials for ‘Case’ that are are actually only applicable for ‘Frame’ or vice versa. Please ignore the non-applicable values and select only the applicable ones.

When you are finished editing, save the record. First make a choice in the list for the action after saving.

![Action after saving](image)

Save the record by clicking the button **save**
While editing a record, you see in the left top corner the following signal next to Form:

This means you have not yet saved the record. You can press the save button while editing. This way you can be sure not to lose any work because of a technical failure.
**Linking media to records**

Open a record and select tab Media in the right window. For linking media which is not already uploaded, click button *Upload media*. Choose the file and click *Upload*. The image is now linked to the record. For more media links, repeat the steps.

For linking media which is already uploaded, click button *Add media link*.
Search for the file and select it.

When a record has more than one linked media, choose a default thumbnail by clicking on the button (star).
For disconnecting media, click the button *Delete media link*. You have only deleted the link. The media itself is not deleted and can be linked again.

When in Collection management, you link media to a record with the upload button (see above), the media will be uploaded in Digital Asset Management (DAM).

In DAM the digital files will be automatically uploaded in the folder *DirectUpload*. To keep your media in DAM well organized, it is best to move the files from *DirectUpload* to your own folder in DAM. See below for an instruction how to organize your digital files in DAM. When you move a file in DAM the link with the record will stay intact.
Digital Asset Management (DAM)

Digital files which are linked to records Memorix Maior have to be uploaded in Digital Asset Management (DAM).

Once you have entered the portal, select DAM.

Next, the browser shows up in which you can organize your uploaded digital files in folders.
Select the folder of your institution by clicking the name. When the characters are bold it is selected.

It is recommended to organize your digital files in folders. For example, you want to upload digital files which belong to a particular collection. Make a folder for the collection in which the files have to be uploaded. It is also possible to upload a folder with files. In that case you don’t have to create a new folder (see below for instruction).

In this example you want to upload files which belong to collection Carl Rensing. Make a new folder with the collection code or another preferred name. Click the button New folder.
In the window, type the name for the new folder.

The new folder underneath the institution (in this case NFM) is created. It is possible to make another new folder under the folder you have just created. If you do not want that, close the window by clicking the white cross.
The new folder is located underneath NFM.

Next step is to upload digital files in the new folder. Make sure the correct folder is selected (bold). Now you can click button Upload file(s) or button Upload folders and file(s). For the first option, click the button below:
The following window shows up. You can drop your files from your finder into the box or you can browse to the files by clicking in the box. We choose the latest option.

Browse in your finder to a digital file, select it and click Open.
The file is uploaded. With this option you can upload only one file. For more more files you can repeat the process by clicking the box again.

In this example two digital files are uploaded in DAM in folder CRE.
When you wish to upload a larger amount of files in one step, you can choose the option *Drop your files here.*

Open your finder, select the files and position the window with your finder next to the box. To do that, first reduce the size of the window. Next, drag the files to the box and drop them.

By doing this, twelve digital files are uploaded in one step. See below
The button *Upload folders and file(s)* can also be used to upload more digital files in one step. For this option Java is required.
In DAM select the folder where the files have to be uploaded and click button *Upload folders and file(s)*. The following screen shows up. Click *Browse (Bladeren)*.

Browse in your finder to the files and select them. Click *Open*.
When you wish to upload a folder with digital files you don’t need to create a new folder in the DAM browser. In this case, select your institution in the browser and click button **Upload folders and file(s)**. Browse to the folder and select it. Click **Open** (see below).

The following screen shows up. Click **Upload**.

When the files are uploaded, close the window. The files are now located in the correct folder in the DAM browser.
When you wish to edit a folder, select it and click button *Edit folder*.

Here you can change the name of a folder. Rename and click *Change (Wijzig).*
When you wish to move a folder, select it and click *Move folder*.

The next window shows up. Select the folder to move in and click *Move (Verplaats)*.
To remove a folder, select it and click *Remove folder.*
Selections

Once you have entered the portal, select Collection management. Next, click tab Selections.

To create a new selection, click button Add selection.
The following screen shows up.

**Selection name**: type the name of your selection. This field is mandatory.
**Description**: free text for information about the selection. Mandatory.
**Entity**: choose the entity for your selection. It is recommended to select the entity Daguerreotype – (code for institution).

Click **Save**.

The new selection is now in the list.
When you return to *Collection management*, the new collection is listed underneath *Daguerreotype - NFM*. Because there are not yet any records in the selection, it shows (0).

To add records to a selection, tick the box of the record(s) and click button *Add to selection*. 
When you wish to add all records from a search query to a selection, tick the box to select all and click button *Add to selection*.

The following screen shows up. Click the name of the selection to add the records.

The records are now added to the selection *Collection Carl Rensing*. 
It is possible to add more records to an existing selection. Just repeat the steps as described above. When you wish to add records to another selection, tick the box of record(s) or select all and click button Add to another selection.

To delete a record from a selection, tick the box of the record(s) and click button Delete from selection. By doing this, the record is only deleted from the selection. It is still in the database.

**IMPORTANT:** do NOT click Delete (trash can). This will delete the record(s) from the database. This can not be restored.
**User management**

Once you have entered the portal, select *User management*.

Next, choose tab *Users*. For a new user, click button *Add user*. 
The following screen shows up.

**Login name**: type the first character of the first name followed by the full surname. For example: asmith for user Allan Smith.

**Password**: click [create own password]. Type a password in the two fields.

**Name**: full name of the new user.

**Email**: private email of the new user.

**Active**: for an active user, tick box yes

**Memorix Express**: tick box for yes

**Search only visible columns**: leave empty. By clicking the user can only search in columns in the grid.

**Use javascript topviewer**: tick the box.

**Roles**: select a role for the new user. What role you choose depends on the type of user.

Click Save.
The new user is added.

It is good practice to give a new user (for example a private collector) permission to work in a selection with his own records. To achieve this, go to User management and choose tab Permissions. Next, choose Selection permissions.

Click button Add selection right.
The following screen shows up.

**Selection**: choose the selection. In this example Collection Carl Rensing
**User permission**: tick the box
**Role**: skip this field
**User**: select the user. In this example asmith
**Allowed to ...**: tick the box for the permissions. Be careful with giving permissions to an unexperienced user.

Click Save.

The selection permissions are added for the user.
When the user logs in, they see the message below. This means they have only permission to work in the collection *Collection Carl Rensing*.

**Message:**

Collection CarlRensing has been chosen for you.
Helpdesk

For assistance on the use of Memorix Maior the helpdesk is ready to help out.

Go to the portal and choose Helpdesk.

The following screen shows up.

Tickets

When you enter a question, a ticket is created. This way you can communicate with Picturae until your question or problem has been answered and you are satisfied. The ticket is then closed. As long as the ticket is being treated it can go through different phases. A ticket can therefore have the following status:

- **New**
  
The ticket is created by you but not yet examined by Picturae.
Feedback
Your feedback is required before further actions can be taken on the ticket. Picturae may need more information or has asked you a question concerning the ticket.

Acknowledged
Your problem or question cannot be solved immediately, but is under consideration and was acknowledged by Picturae. Further information will follow.

Assigned
Your problem or question is acknowledged by Picturae and has been assigned to a collaborator who will take care of the ticket.

Closed
This ticket is closed. A ticket can be closed for various reasons, the reason is noted: solved, cannot be solved, postponed, double entry, etc.

New question
To ask a new question please click on the "New ticket" in the submenu. These input fields are available (mandatory input fields are indicated with an asterisk):

Reproducible
Here you indicate how often you encounter this issue.

Impact
Please indicate the weight of the consequence of your question. Is it impossible to continue your work until the question is answered, or is it only a request for background information?

Priority
How important do you think your question is? Should it be solved as quickly as possible, even before questions from other collaborators or clients, or could it possibly take a bit longer?

Summary
Please give a short summary of your question in one sentence.

Description
Provide a short description of your question.

Additional information
Provide here additional background information that can help Picturae answer your question.

Attachment
Supply any needed files as attachments. E.g. a screen print that helps describe your question.

Ticket Summary
In the summary of tickets you can see an overview of the tickets and their status. Via the status you can see if you need to respond your tickets and if the report has been picked up by Picturae.

Closed tickets
Here you can see which tickets have been solved and closed. If you are not satisfied with the solution you can always reopen the ticket.