

CULT  VATE

Document Server

User Guidelines

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Author: Henriette Kurschel

CSC AUSTRIA
Cultural Service Centre

Hans-Sachsgasse 14/3 A-8010 Graz
Tel: +43.316.811210/Fax: +43.316.811210-30
email: office@csc-austria.at
internet: <http://www.csc-austria.at>

Table of Contents

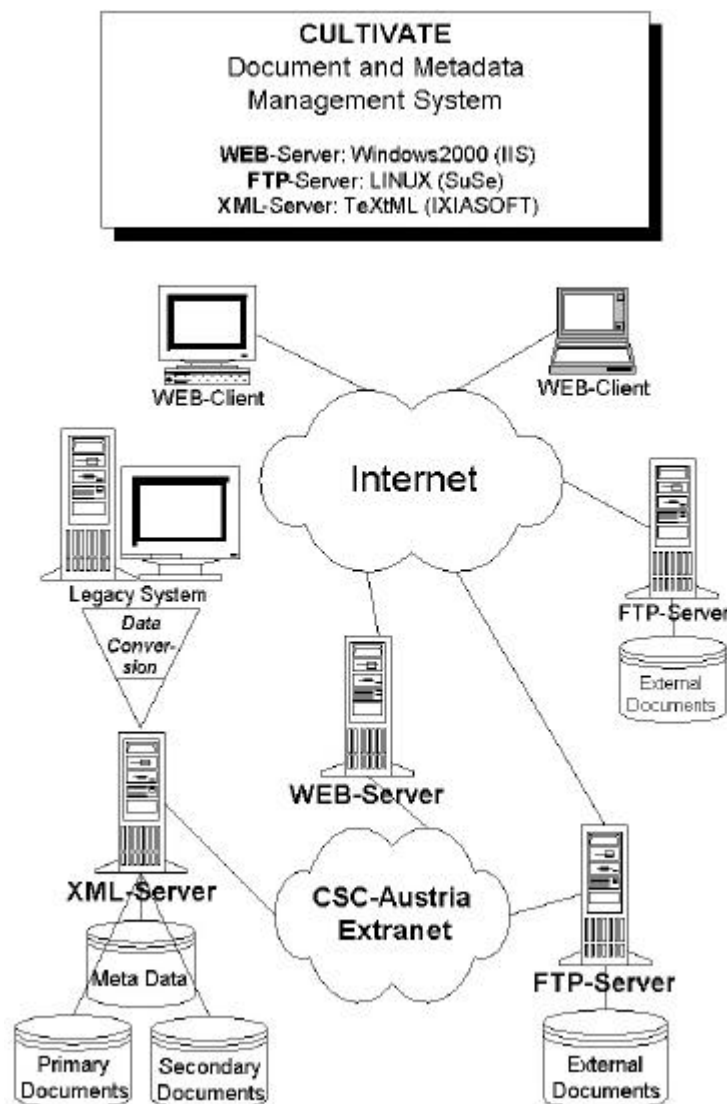
1	PURPOSE OF THE CULTIVATE DOCUMENT SERVER	4
2	START THE APPLICATION	5
3	DATA TYPES	5
3.1	Metadata	5
3.2	Documents	6
4	DOCUMENT TYPES	7
5	SEARCH	7
5.1	Search all document types	8
5.2	Search a special document type	9
5.3	Truncated Search Terms	9
5.4	Sort search result	9
6	ENTER DATA	10
6.1	Date	10
6.2	Add a Primary/Secondary Document	10
6.3	Import Data	11
7	MODIFYING A DOCUMENT	11
8	REMOVE ENTRY	12
9	EXPORT SEARCH RESULT	12
10	ANNEX: SEARCH EXAMPLES	13

1 Purpose of the CULTIVATE Document Server

The main target of the accompanying measure Cultivate is to establish a Cultural Heritage Network. The Document Server will be a central resource of the Cultivate electronic information services. This database improves access to general information concerning institutions, publications and projects related to IST programme themes. Therefore it will facilitate the use and exploitation of project results and exchange of information in general.

The contents are provided by the Cultivate nodes. Each node is expected to contribute as completely as possible data concerning its area.

The document database is based on a TextML Server. This database stores metadata (Dublin Core)



as well as primary documents that are totally uploaded to the document base. It manages document bases and all transactions available on document bases and allows you to add, remove, index, search and retrieve XML documents. With XML at its core the database takes full advantage of XML's extensibility and portability.

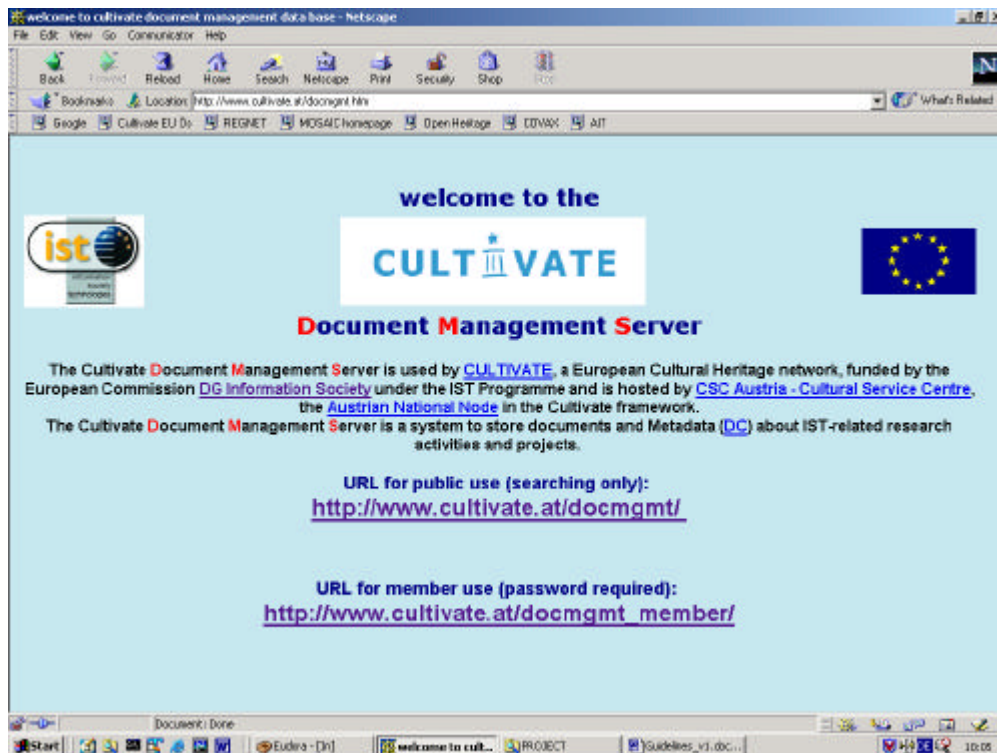
Web server, FTP server and XML server are hosted at CSC Austria. They provide global internet accessibility and the virtual catalogue database. The FTP server offers services to store documents via FTP at this site.

The end users access the document base through the Internet using custom user interfaces. In fact you need a computer, an internet access, a WEB Browser and the authorization to manage data of the virtual catalogue.

There will be a lot of end users managing data entries and performing search. For this reason the database is designed for simple and intuitional use and focuses on facilities for basic data management and basic search.

2 Start the Application

To start the application on your computer start a web browser (we recommend to use IE, there might be some problems with Netscape) and open the website: <http://www.cultivate.at/docmgmt.htm>.



For “searching only” click on the link for public use (you need no password).

For entering and management of documents click on the link for member use. A dialog window appears and you have to enter the password (all Cultivate members have got it per email). You can also perform search in this mode.

3 Data types

In principle the database anticipates metadata or documents (that are totally uploaded to the system).

3.1 Metadata

Metadata description refers to Dublin Core Metadata Element Set (<http://dublincore.org/>).

There was need for defining additional data fields. These fields can be identified by the characters “.”, “*” and “+” at the beginning of the field names.

A short definition of Metadata fields (source: <http://dublincore.org/documents/1999/07/02/dces/>):

Name of Element	Description
Title	A Name given to the resource. Typically, a Title will be a name by which the resource is formally known
Creator	An Entity primarily responsible for making the content of the resource
Subject	The topic of the content of the resource
Description	An account of the content of the resource (e.g.: an abstract)
Publisher	An entity responsible for making the resource available
Contributor	An entity responsible for making contributions to the content of the resource
Date	A date associated with an event in the life cycle of the resource
Type	The nature of the content of the resource In the document base: type of described document
Format	The physical or digital manifestation of the resource. In the document base the format of the document.
Identifier	An unambiguous reference to the resource within a given context.
Source	A reference to a resource from which the present resource is derived. Document type publication: the name of the journal, newsletter, ...
Language	A language of the intellectual content of the resource.
Relation	A reference to a related resource.
Coverage	The extent or scope of the content of the resource.
Rights	Information about rights held in and over the resource.

Additional fields used for most of document types:

Name	Description
Cultivate Node	The name of the national node that entered the data
URI	Reference to a website

Other additional fields that are not self explanatory will be described in connection with the document types.

For each document type a data entry mask is defined for the entering of metadata.

3.2 Documents

Primary documents:

For each metadata set there can be uploaded one primary document.

Primary documents can be in following formats: plain text, Word document, HTML file, XML file (no PDF files!).

Secondary documents:

Secondary documents can be in various text formats as primary documents but also other formats: e.g.: PDF files images, multimedia related formats, Powerpoint presentations, executable files.

It is possible to upload a primary document or a secondary document without adding metadata. Primary document will be found through document name and indexed content. Secondary documents will be found through document name.

It is no problem to use umlauts, special characters and accents (UTF8 encoding).

4 Document types

There are five types of documents defined:

Address: contains relevant addresses (institutions of EU, national institutions, memory institutions). Presently the database contains more than 400 addresses collected by the Norwegian Node.

Contact: contact information of each Cultivate node

Cultivate: documents concerning Cultivate

Projects: description of projects in the area of Cultural Heritage. Currently we have collected metadata descriptions and fact sheets of EU IST-Programme projects. At time of November 2001 project data from the Exploit database and data of ongoing IST projects are comprised. That means that all projects since 1990 are available on this database.

Publication: monographs, articles, articles in journals (e.g. : EU key documents, reports, articles from Cultivate Interactive, Exploit Interactive)

5 Search

Metadata and primary documents are fully indexed and allow end users to search the document base. The dynamic indexing capabilities of database updates document indexes as documents are added to the document base. In this manner, documents can be searched for and retrieved immediately.

Either you search for one term or for parts of sentences/entries in one data field. It is not possible to enter two disjointed words that are in fact contained in one document but not in successive order.

EXAMPLE: you enter the search term **key document**. The result will not contain documents with sentences like: one **key** issue is mentioned in the **document** about (For this purpose use the search operators!)

Search terms of various fields are combined with **AND**. Within one data field you can use search operators (**AND, OR, WITHOUT, advanced AND, PROXIMITY, FREQUENCY, PRIORITY**).

You get more information about search operators and wildcards by clicking on the yellow ? (help) button on the right of FULL TEXT field.

The full text search is not case sensitive.

EXAMPLE: to get a list of all projects concerning museums libraries and archives, enter in the field DESCRIPTION (you might also choose FULL TEXT): **museum | library | archive**
To improve the result you might use truncated search (described below): **museu* | librar* | archiv***
The result list displays all documents mentioning either one of these institutions, or two or all.

5.1 Search all document types

In the search page define your search criteria: select a subject and/or enter a term in the mask FULL TEXT. You might also define sorting criteria for the search result.

Click "SEARCH".

The number of documents found and the titles of the documents matching the query are displayed as a list on the left frame of your window. You can click on one title to get the whole document displayed.

Words that you searched for are highlighted in red bold type.

EXAMPLE: enter the word "garden" in the field FULL TEXT and click SEARCH. Two documents will be found and displayed on the left frame. Click the title of a document to get the whole document displayed on the screen.

5.2 Search a special document type

Select a document type at the first search page, enter search criteria (see a part of the search mask for the document type addresses below.) and click "SEARCH" to execute the query.

The screenshot shows the 'Search for documents' interface. At the top, there is a navigation bar with 'End Session' and 'click before you finish!' buttons, and the 'CULTIVATE' logo. Below this, the search mask includes a 'Search' button, a 'Clear' button, and a document icon. The search criteria are as follows:

- Document Type: ADDRESS (selected in a dropdown menu)
- URI: [text input field]
- Cultivate-Node: [dropdown menu]
- Name: [text input field]
- Name-Original: [text input field]
- Type: [text input field]
- Address: [text area with vertical scrollbar]
- Country: [text input field]
- Phone: [text input field]

The results are displayed in the same way as in the case of "search for all types".

5.3 Truncated Search Terms

The database can manage left and right truncation. Use a wildcard (*, ?, []) to replace a part of a word.

EXAMPLE: to get all entries mentioning archives you have to search for the terms: archive, archives, archivist, archivists and archival. So you enter in the search mask **archi*** and you will get all relevant documents.

5.4 Sort search result

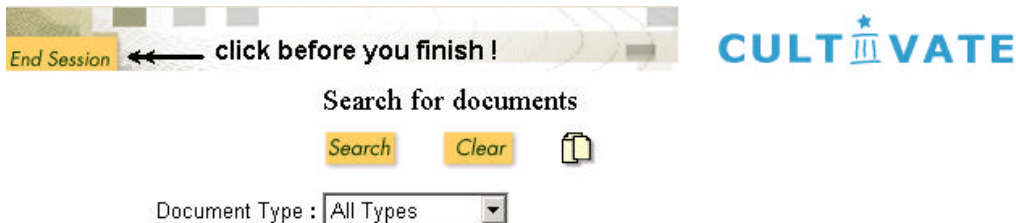
Criteria for the sorting of search results can be defined in the search mask or you can sort the result of a query. To sort the results of a query select the sort criteria and click SORT.

The screenshot shows the 'Result' page. It displays '34 document(s) found'. Below this, there are two dropdown menus for 'Select 1st criteria' and 'Select 2nd criteria', followed by a yellow 'Sort' button. At the bottom, it shows 'Document(s) 1 to 20'.

6 Enter Data

To enter data:

1. click on the icon on the right of SEARCH and CLEAR buttons (=ADD A DOCUMENT).



2. choose the document type.
3. enter data.
4. click on the button ADD
5. a message informs you that the entry was saved

6.1 Date

Dates are currently not defined as date. To avoid problems with data entry/format and to be consistent enter dates in this format:

Date: YYYY-MM-DD
Interval: YYYY-MM-DD to YYYY-MM-DD

6.2 Add a Primary/Secondary Document

Electronic documents stored on your computer or on a computer of your network can be uploaded to the Document base.

To add a primary or secondary:

1. open the mask for data entry
2. enter metadata
3. click BROWSE on the right of primary/secondary document field

4. specify the directory and the document file you want to add
 5. click PASTE to add the document.
- Enter further data as described above.

EXAMPLE: in the directory "Project_data" of your local computer is a word document named "project_fact_sheet.doc" click on this document and it will be added to the database.

6.3 Import Data

MSEXcel files, MSAccess files and XML files can be imported to the document base (this task is managed by the administrator).

7 Modifying a document

When a document is stored in the database it can still be modified. The modified document will be indexed again as it is saved to the document base.

To modify a document:

1. perform any search.
2. In the list of retrieved entries choose a document and click the corresponding title.



3. click EDIT: a new page is displayed where you can modify any information in the document.
4. modify the document



5. click APPLY MODIFICATIONS
6. a message informs you that the modified entry was saved.

8 Remove entry

To remove an entry click REMOVE on the right top of the window. A new page opens prompting you to confirm the deletion. Click OK to delete the document. You may repeat the search if you want to make sure that the document is deleted.

The screenshot shows the Cultivate Document Server interface. At the top, there is a navigation bar with the 'CULTIVATE' logo and buttons for 'New Search', 'View Primary', 'Edit', and 'Remove'. A warning message 'click before you finish!' is displayed above the 'New Search' button. On the left, a sidebar lists search results, including 'PROJECT SEAX-Digital Archive Management and Access System' and 'PROJECT Trial and evaluation of a Biodiversity Information System for public use in a'. The main content area displays details for a selected document: 'Document Type : PROJECT', 'Primary Document : virtual.doc', 'Cultivate-Node : United Kingdom', 'Title(s) : Virtual Archive and Library for Cathedrals', 'Acronym : VirtuAL', 'Start : 2001', 'End : 2002', 'Date : 2001-09-01 to 2002-08-31', and 'Language : English'. There are also 'Top' and 'Hits' buttons on the right side of the interface.

9 Export Search Result

Currently the export of search results is managed by the administrator (CSC Austria). In the future each Cultivate node will be able to carry out export itself.

10 Annex: Search Examples

1. You are interested in information about digitisation:

1. open the search page
2. ALL TYPES of documents is already selected
3. choose in the list box of the SUBJECT field "Digitisation"
4. click SEARCH to execute the query.

The result comprises all documents with the subject Digitisation. Take into account that SUBJECT is the main topic of a document. For that reason a query using FULL TEXT will result more documents.

2. You would like to know if there are some projects dealing with metadata.

1. open the search page
2. choose document type project
3. enter the search term "metadata*" (the wildcard is necessary!) in DESCRIPTION
4. click SEARCH to execute the query

3. You would like to see which projects are coordinated by french organisations

1. open the search page
2. choose document type project
3. enter "france" in ORGANISATION
4. click SEARCH to execute the query

4. You would like to get a list of projects coordinated by a german organisation and with swedish participants

1. open the search page
2. choose document type project
3. enter "germany" in ORGANISATION
4. enter "sweden" in PARTICIPANT
5. click SEARCH to execute the query

5. You would like to get a list of projects with irish participants

1. open the search page
2. choose document type project
3. enter "ireland" in PARTICIPATION
4. click SEARCH
5. sort the result by the number of hits to see which projects has most irish participants

6. You would like to get information about the ARCHEOGUIDE project

1. open the search page
2. ALL TYPES is already selected
3. enter "archeoguide" in FULL TEXT
4. click SEARCH

The result lists project information and publications concerning ARCHEOGUIDE.