DELIVERABLE

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D6.1 - Intermediate report on entered metadata sets

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Authors:

Claudia Schneider (RWTH Aachen)

Stefan Kurtenbach (RWTH Aachen)

Revision History

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Statement of originality:

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Contents

1. Introduction and work package objectives

Objective

> *"Metadata describes other data. It provides information about a certain item's content. For example, an image may include metadata that describes how large the picture is, the colour depth, the image resolution, when the image was created, and other data. A text document's metadata may contain information about how long the document is, who the author is, when the document was written, and a short summary of the document."*[1]

For an efficient and reliable information retrieval Europeana uses a standardized metadata scheme which is based on Dublin Core (DC) and Europeana Semantic Elements (ESE). By applying these standards to the different types of digital content provided by *think*MOTION project, each type will obtain a set of metadata, which describes the object as explicitly and detailed as possible.

In order to ensure the metadata quality, the "Description of Work" for *think*MOTION project includes *work package 6 "Entering metadata for content".* The performed tasks and workflows and the achieved results of this work package in the 1st project period (06/2010 – 05/2011) is described in this document.

Main tasks

The work in WP6 "Entering metadata for content" includes two tasks.

The objective of **Task 6.1** is to enter an appropriate set of metadata for each content item. The task involves the completion and (if necessary) the correction of the metadata entered as a result of the workflow in *WP 3*. The metadata sets for the different types of content are defined in accordance with the standards of Dublin Core (DC) and Europeana Semantic Elements (ESE). Additionally the language of the entered metadata sets is marked in order to facilitate the translation work in *WP 8*.

The aim of **Task 6.2** is the preparation and publication of guidelines for entering metadata. These guidelines cover the conversion of existing metadata and the entering of new metadata in line with the required metadata for Europeana. In addition, the guidelines are the basis for the staff training activities in *WP10* (Task 10.3).

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[1] http://www.techterms.com/definition/metadata

2. Resources, workflow and results

2.1 Resources for metadata

Metadata for documents can be gathered from bibliographic catalogues and databases in case the document has been registered there. For types of content like images, videos, animations, teaching materials or persons other ways to collect information about the objects must be identified. In case of thinkMOTION project the following sources for metadata are used:

Text documents

- Literature/reference lists
- Patent databases
- Archives of university libraries, museums and other institutions
- Union Catalogue (GVK) of seven German federal states participating in the Common Library Network (GBV) (this multi-material bibliographic database covers the holdings of over 34.1 million records of more than 400 GBV member and associated libraries with over 79.4 million separate catalogue entries of books, conference proceedings, periodicals, dissertations, microfilms and electronic resources)
- Anales de la Asociación Española de Ingeniería Mecánica (Journal of the Spanish Association of Mechanical Engineering)
- DYNA Journal (Reference Journal of the Mechanical and Industrial Engineering in Spain)
- PhD Thesis, images, monographs and presentations made by Spanish research groups integrated in the Red Nacional de Ingeniería Mecánica (National Network of Mechanical Engineering)

Images

- attached text e.g. in a book, text included on the image
- descriptions about collections of physical models given by the keeping institution

Videos/Animations

- technical information attached to the files
- student projects for CAD models

Teaching materials

- information contained in the documents
- details given by the institution, which produced the documents

Persons

- data given by the authors directly or their heirs
- biography data found in books, articles or internet
- research institutions

2.2 Workflow

The workflow for entering metadata follows an approved workflow established during the German national DMG-Lib project. Because this workflow guarantees a high quality of metadata it has been transferred from DMG-Lib project to thinkMOTION.

2.2.1 Characteristics of thinkMOTION database

The basis for the established workflow is the "production database" (ProDB). It supports the metadata input by offering special interfaces for the different types of content. With regard to the high amount of items that the thinkMOTION project wants to provide for Europeana and therefore to ease the process of entering metadata, a simplified input interface for documents and persons has been developed (see Figure 2 and Figure 3). These interfaces allow the entering of metadata that describe the object shortly but explicitly and furthermore fulfil the requirements of the ESE standard.

When entering the ProDB the user can chose between two editors for entering metadata. A detailed description of both editors and a definition of the input fields are given in *Annex 2:* and *Annex 3:* .
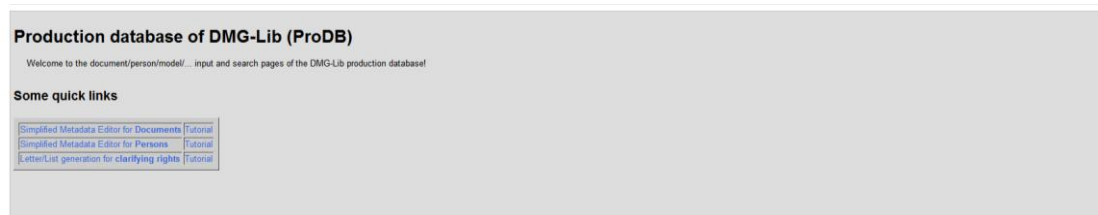

Figure 1: Welcome interface of ProDB

Due to the characteristics of the database it is possible to enter metadata incrementally. In case there are only few informal references on a certain object it is possible to enter only these fragmentary metadata and to complete or correct them as soon as a proven set of metadata can be provided.

The input fields for *persons/biographies* offer options for entering information about "who", "when", "what" and "where", which allow time as well as location based searches. By linking the person's biography with primary and secondary literature, images and other relevant objects, a comprehensive overview on a person's work can be offered to the end user.

Figure 2: Simplified Metadata Editor for Documents

Figure 3: Simplified Metadata Editor for Persons

2.2.2 Special feature: Mechanism descriptions

As the *think*MOTION project is specialized on mechanism and machine sciences it provides detailed information about mechanisms as well. The description of a mechanism is a comprehensive task, which requires a lot of expert knowledge in mechanism theory. Metadata for mechanisms cannot be collected from external sources as it is the case with the objects described above. Therefore the definition of a metadata set for a mechanism description is based on a classification guideline, which has been developed at the Department of Mechanism Theory and Dynamics of Machines of RWTH Aachen (thinkMOTION beneficiary and Leader of WP6 – Meta data).

The idea behind the mechanism descriptions is to provide solutions for a special motion task based on existing mechanisms on one side and to enable a typology synthesis based on this mechanism data base on the other side. The editor for mechanism descriptions is presented below.

Main tab

The **main tab** contains several input field for inserting general information about the mechanism. In the input field **function** the mechanisms can be described. Additionally it can be described by using the given symbols for the classification which are **transmission mechanism**, **guidance mechanism**, **summation mechanism**, **differential mechanism**, **adjustable mechanism** and **locking mechanism**. Furthermore the possible application for the mechanism can be entered in the input field **Usage for instance in**. The description of the type of the mechanism like special constructive properties can be inserted in the field **Structure**. At least there is some space for comments which can be shown in the portal (**Comment (public)**) or are used for internal information (**Internal**).

Figure 4: Main tab

Structure of the mechanism

The mechanism typology defines the mechanism in a structured way regarding to the configuration of links, joints and motion. This kind of classification is an analogue to the theoretical ones with an offset regarding to the motion task. It helps to decrease the solution set, which is caused by the classification according to the purpose of the mechanism. Figure 2 shows the graphic user interface for the tab **structure of a mechanism**.

Figure 5: Structure of the mechanism

The structure of the mechanism can be divided in separate characteristics:

- Dimension

The mechanism dimension defines the dimension of the mechanism motion and takes the orientation of the input and output axis into account. It is divided into the sub-characteristics **planar, spherical** and **spatial mechanism**, which can be selected in a drop-down menu (Figure 6).
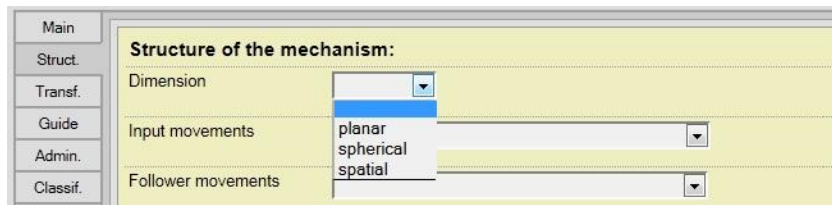
Figure 6: Mechanism Dimension

- Input movements/follower movements

The input movements and follower movements, actually representing two different characteristics, can be specified identically with the characteristics **rotation**, **rectilinear translation**, **frame motion**, **position**, **orientate**, **screw motion**, **rotation superposed (input movements)/combined (follower movements) with rectilinear translation**, **multiple** and **others**. Figure 7 shows these characteristics.
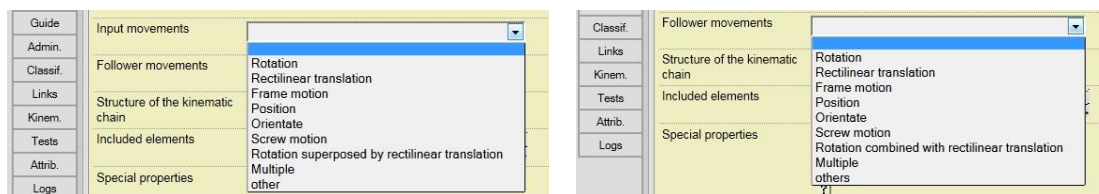
Figure 7: Input movements (left), follower movement (right)

- Structure of the kinematic chain

The structure of the kinematic chain (Figure 5) describes the mechanism in a short and concisely way. It is an input field where the description can be pasted, for instance "four-bar linkage".

- Number of links and their ability to revolve

The total number of links of the mechanism must be defined in the input field. Furthermore the links can be able to revolve completely. Both parameters "**yes**" and "**no**" can be selected in the drop-down menu. In a special case where the complete revolution is not necessary for the solution but anyway possible, the characteristic "**may be**" can be chosen as well. The drop-down menu is shown in Figure 8.

Figure 8: Revolution ability

- Number of driving links and their ability to revolve of at least one input

The number of driving links must be defined as well as the revolution ability of at least on input link. The parameter "**yes**" and "**no**" can be selected again in the drop-down menu. The selection "**others**" must be made when there is no input link revolving completely (Figure 9).

Figure 9: Revolution ability of driving links

- Number of driven links and their relative position of driving and driven axis

The number of driven links must be defined in the input field. The relative position of driving and driven axis can be chosen in the drop-down menu with characteristics **parallel**, **coaxial**, **intersecting**, **orthogonal intersecting**, **skew**, **orthogonal crossing** and **others** (Figure 10).

Figure 10: Relative position of driving and driven axis

- Mobility

The mobility of a mechanism is defined by its degree of freedom which can be pasted in an input field (Figure 5).

- Included elements

This characteristic describes the kind of used elements. This can be a **linkage**, **cam**, **gear**, **friction wheel**, **wedge**, **screw**, **belt**, **hydraulic** or **step including mechanism** presented in Figure 11 from left to right.

Figure 11: Included elements

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- Special properties

The mechanism can possess the special properties **configurable** and **adjustable** as shown in Figure 12. Differently configurable mechanisms can reach completely different paths of points. Adjusting a mechanism is a kind of fine tuning according to a certain path of a point.
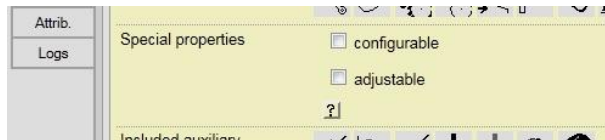
Figure 12: Special properties

- Included auxiliary elements

The mechanism can contain several auxiliary elements to ensure or simply improve the motion. To this purpose a **spring**, **auxiliary teeth**, a **follower roll**, a **catch**, a **repression**, a **fly wheel** or **mass balance** as shown in Figure 13 from left to right can be used.

Figure 13: Included auxiliary elements

- Type of function of auxiliary elements

The types of function of the auxiliary elements are shown in Figure 14. To **keep kinematic pairs in contact** or to **influence the friction in joints** like a spring presses a follower roll on a cam are important settings to be made. A fly wheel is a huge energy storage and auxiliary teeth help **overcoming undefined states**. Keeping dwells performs a kind of locking.
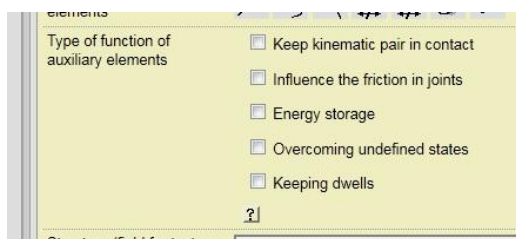
Figure 14: Type of function of auxiliary elements

- Structure (field for tests with XML descriptions)

The input field of the characteristic structure was introduced for storing some XML test data. It is shown in Figure 4.

Transfer tasks

The tab **transfer task** deals with another kind of classification due to the transfer behaviour of a mechanism (Figure 15).
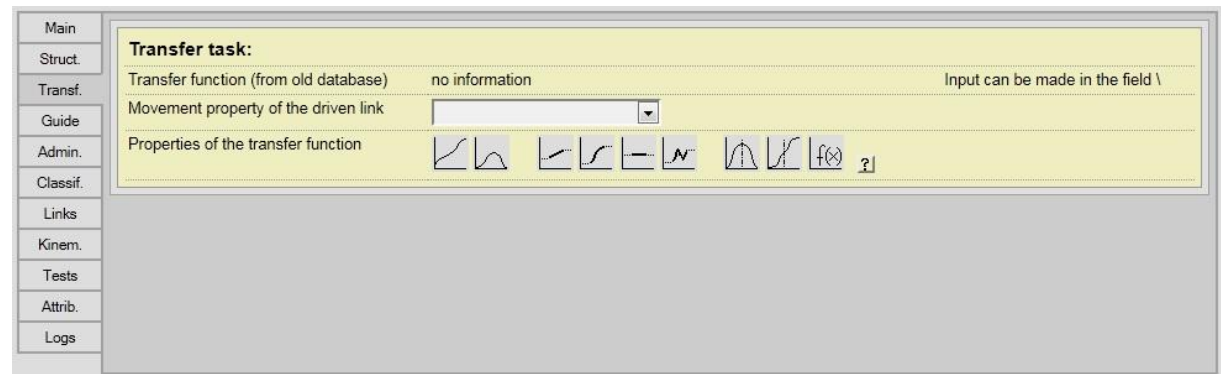
Figure 15: Transfer task

Three characteristics can be separated:

- Transfer function

The characteristic transfer function remained from an old version of the database and doesn't contain any information. In the actual version of the database all the important properties can be selected in the characteristic properties of the transfer function.

- Movement property of the driven link

The movement property of the driven link describes the motion of the output link. This movement can diversify and take the following properties: **revolving**, **oscillating: unknown range**, **oscillating: < 100°**, **oscillating: 100° <= x < 180°**, **oscillating: 180° <= x < 360°**, **high deviation** or **miscellaneous** (Figure 16).

Figure 16: Movement property of the driven link

- Properties of the transfer function

The properties of the transfer function are displayed in (Figure 17). These properties are expressed by different symbols describing the function which are (from left to right): **has identical direction**, **has reversed direction**, **is linear (at least partly)**, **is non-linear (at least partly)**, **has a dwell**, **has a pilgrim-step**, **is axially symmetric**, **is point symmetric**.

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Figure 17: Movement of the transfer function

Guidance tasks

The last part of the presented classification describes the guidance task. Special points of links or links in general can be guided on a special path to fulfil a certain motion task. The tab **guidance task** is shown in Figure 18.
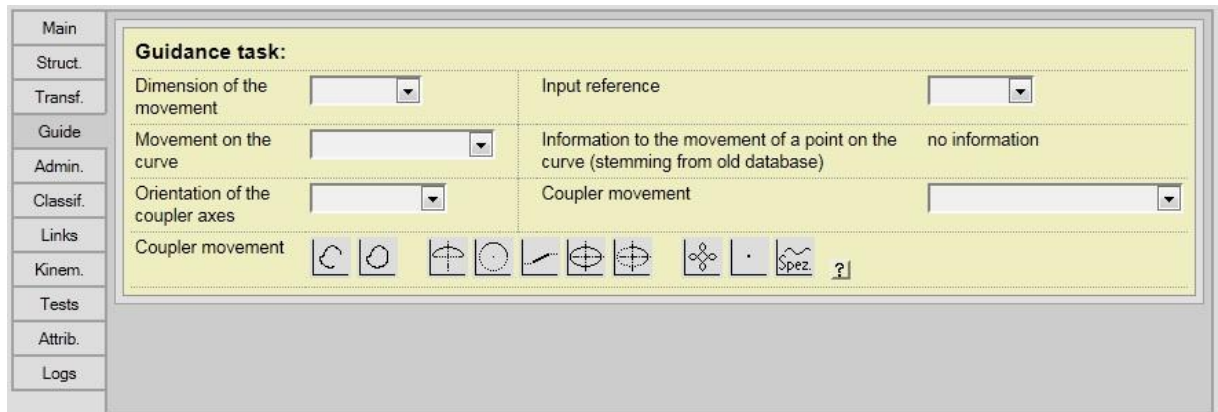
Figure 18: Guidance task

In that classification tab six characteristics can be derived. They are explained in the following:

- Dimension of the movement

The dimension of the movement again can take the sub-characteristics **planar, spherical** and **spatial mechanism**, which can be selected in a drop-down menu shown in Figure 19.
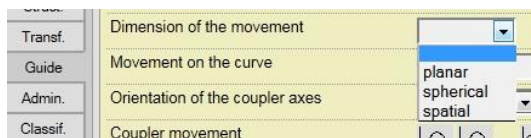
Figure 19: Dimension of the movement

- Movement on the curve

The movement on the curve simply describes the direction on the curve which can be **reversed direction**, **identical direction** or **other**. Figure 20 shows the drop down menu.
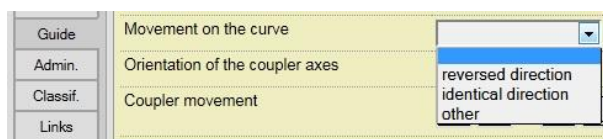
Figure 20: Movement of the curve

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- Orientation of the coupler axes

The orientation of the coupler axes can take characteristics **general**, **symmetrical**, **parallel** or **other** (Figure 21).
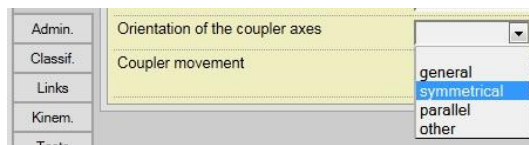
Figure 21: Orientation of the coupler axes

- Coupler movement

The coupler movement describes the path of the coupler. To this purpose several symbols defining a path can be selected (Figure 22). The coupler can move on an **open path**, a **closed path**, an **asymmetric path**, a **partly circular path**, a **(partly) linear path**, an **elliptic path**, a **partly elliptic path**, a **cycloid path**, a **fixed point** or a **special path**.

Figure 22: Coupler movement

- Input reference

In principle, the guidance tasks have to be solved by generating of an output motion, in which the guided link or the guided coupler point is moved through a prescribed sequence of positions. It may be necessary to implement a specific relation between the output and the input motion. This case describes an input-related guidance task. It is characterized that the prescribed sequence of positions is assigned to input positions. If the guidance task is independent to input motion this task describes a not input-related guidance task. This relation is described with **input reference.** The reference to input just can exist or not. The settings to be made there are **yes** (input-related guidance task) or **no** (not input-related guidance task). In case an input reference is **possible**, this setting can be chosen as well (Figure 23).
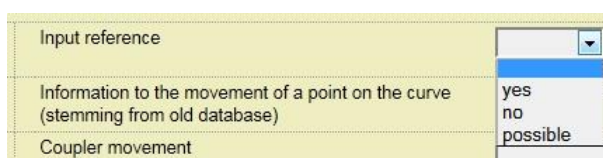
Figure 23: Input reference

- Information to the movement of a point on the curve

The characteristic information to the movement of a point on the curve remained from an old version of the database and doesn't contain any information.

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- Coupler movement

The characteristic coupler movement contains nearly the same settings like the characteristic movement property of the driven link in the transfer task tab which are: **revolving**, **oscillating: unknown range**, **oscillating: < 100°**, **oscillating: 100° <= x < 180°**, **oscillating: 180° <= x < 360°** or **miscellaneous** (Figure 24).
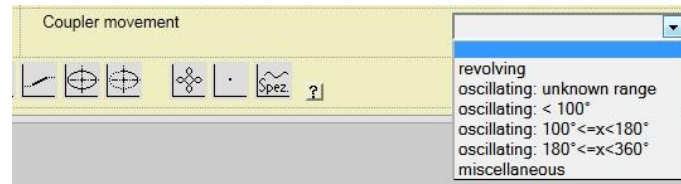
Figure 24: Coupler movement

Kinematic chain

The next important characteristic is described by the tab **kinematic chain** (Figure 25). Every mechanism can be classified in according to its number of links and their arrangement within the mechanism. To this purpose every possible kinematic chain is displayed in the graphic user interface to make a selection. The first decision must be made due to the number of links. In the first row four and six bar linkages and in the second and third row eight bar linkages are shown. The corresponding kinematic chain according to the existing mechanism must be selected.
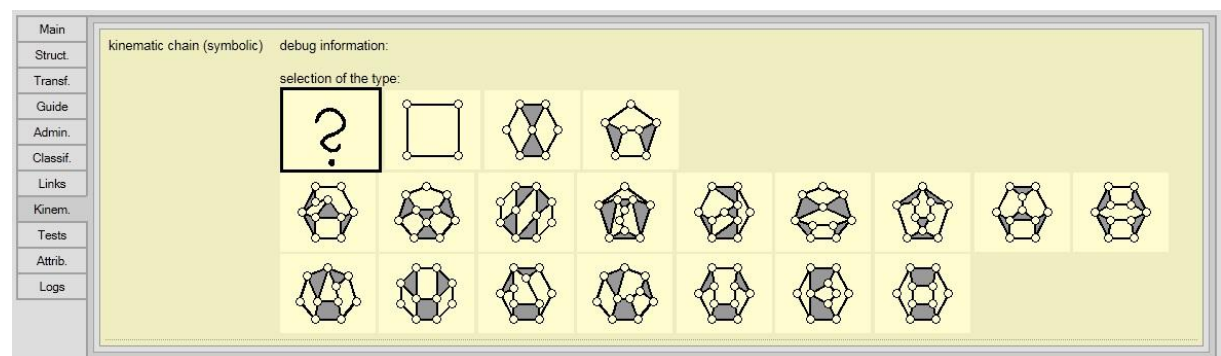
Figure 25: Kinematic chain

Figure 26 shows the next step for defining the kinematical chain. The user will be demanded to select that special link which forms the frame. Subsequently, the chosen link will be highlighted (Figure 27).
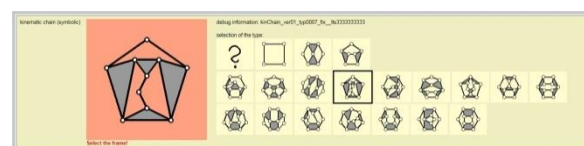
Figure 26: Select the frame
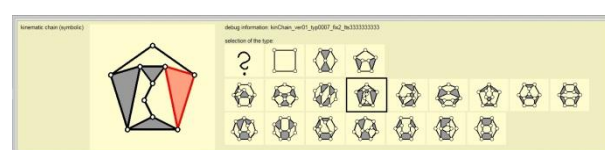
Figure 27: Frame selected

Although these comprehensive metadata will not be displayed on Europeana (except a thumbnail picture of the mechanism with corresponding metadata, see *Metadata Guidelines*), thinkMOTION project attaches great importance on the mechanism descriptions in order to provide an above-average information content for all user groups.

2.3 Results

During the 1st year of thinkMOTION project first significant result have been achieved and are described in the following chapter.

2.3.1 Specifications for metadata sets

The work for defining a metadata set for each type of content started with a detailed analysis of the Dublin Core and ESE standards. As these definitions differ slightly from the common terms used in librarianship, it was necessary to adapt them to the definitions used in the database interfaces.

The result of this work is shown in Annex 1 *"Metadata Guidelines"*. This document displays the metadata for each type of content both as common terms and ESE. Additionally the guidelines give information about metadata which are recommended by Europeana but do not have to be entered to the database manually. Due to the technical characteristics of thinkMOTION database it is possible to generate certain metadata automatically while transferring the datasets to Europeana.

In line with these guidelines the adapted definitions were implemented to the database. The results are shown in Figure 2, Figure 3 and the ProDB tutorials (Annex 1 and 2).

2.3.2 Entered metadata to thinkMOTION database

The described work package 6 is closely connected with work package 3 "Locating and providing content and clarification of rights of use". The contents, that the partners have located, provide the metadata to be entered and therefore the work of WP6.

The result of the efforts made during the 1st year of thinkMOTION project is shown in Table 1.

Type of content	Amount of entered metadata sets
Text documents	**5.987**
Article	*2.276*
Book	*274*
PhD	*83*
Patent	*1.689*
Teaching material	*300*
Persons	4.972
Images	140
Animations	0
Total (without persons)	**6.127**

Table 1. Entered metadata sets during the 1st project period

Most of the metadata sets entered are for text documents, such as articles, books, theses and patents, and for images. The required metadata for these types of content are defined in the *metadata guidelines*, therefore it can be stated that the entered data fulfil the Europeana requirements as well.

In the case of metadata for persons not all datasets fulfil these requirements. It will be one task for the next year of *think*MOTION project to complete as many of these datasets as possible.

Guidelines for WP6
"Entering metadata for content"

Version 1.0

-draft-

Metadata for *think*MOTION

Dear Partners,

this is the first draft of the guidelines for WP6 "Entering metadata".

As we want to collect different types of content, we will need many different metadata. These guidelines will give you information about the metadata we have to collect for thinkMOTION.

The first slide gives you an overview and a definition of each suggested metadata element in general. The slides 5-12 show you the set of metadata for different types of content. All categories refer to the "Europeana Semantic Elements (ESE)"-Standard. In order to avoid misunderstandings we have displayed the ESE and the common terms as well.

The elements have different levels of obligation and are marked as mandatory, recommended and optional. According to this, the red elements describe the minimum set of metadata and all elements together would then be the maximum set of metadata for one item.

For the first entry of text documents (protected by copyright) into the *production database* you will need only few metadata (title, author, date), as we discussed during our Kick-Off Meeting in Ilmenau. After the *rights of use* have been clarified it will be necessary to enter more detailed metadata. For those types of content where we do not have to ask for the rights of use, all requested (and available) metadata can be entered into the database directly.

In order to make this draft a final version as soon as possible, we ask you for your feedback. Please send us your comments and/or ideas for improvement.

Thank you and best regards,

thinkMOTION team at RWTH Aachen

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Metadata for *think*MOTION

The following elements are required metadata for content in general. On slides 5-12 you can find specifications for each type of content.

- **Title:** A name given to the resource. Typically, a title will be a name by which the resource is formally known.
- **Parallel title:** An explanatory or alternative name for the resource. Also applicable for translations of the original title.
- **Creator:** An entity primarily responsible for creating the resource. This may be a person, organisation or a service.
- **Publisher:** The publishing company
- **Date of Publication:** Year (and month, if available)
- **Place of Publication**
- **Language:** Language of the title
- **ISBN:** International Standard Book Number (a unique numeric commercial book identifier).
- **Rights:** Information about intellectual Property Rights, access rights or license arrangements for the digital object (digitized or born digital).
- **Other:** This is a container element which includes all relevant information that otherwise cannot be mapped to another element.

> Mandatory – you must provide this element
> (strongly) Recommended- you should provide this element
> Optional – you can provide this element (if the information is easily accessible)

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Metadata for *think*MOTION

The following elements must be provided for Europeana. They will be generated automatically during the upload from DMG-Lib to Europeana. So the following definitions are only for your information.

- **Type:** All digital objects in Europeana have to be classified as one of the four Europeana material types using upper case letters: TEXT, IMAGE, SOUND or VIDEO. This element is used to create the Type facet based on the Europeana material types. A default thumbnail is used for each type in the short or full record display.

- **Provider:** This element should contain the name of the organisation that delivers data directly to Europeana. In most cases this will be the name of a collector or project although some individual content holders will also fall under this definition. The names of these organisations should be provided in the original language(s). The value should be provided by the organisation that is supplying data to Europeana.

- **isShownAt/By:** isShownAt ➔ An unambiguous URL reference to the digital object on the provider's web site in its full information context. isShownBy ➔ An unambiguous URL reference to the digital object on the provider's web site in the best available resolution/quality. Either isShownAt OR isShownBy is Mandatory.

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Metadata for *think*MOTION

Books/Education works
(monographs, proceedings, bachelor/
master/doctoral theses, lecture notes)

Common Term	Europeana Semantic Element
Title/Parallel title	europeana:title
Language (of title(s))	europeana:language
Alternative title	europeana:alternative
Author	europeana:creator
Publisher	europeana:publisher
Date of publication	europeana:date
Place of publication	
Language (of content)	dc:language
ISBN	
Rights	europeana:rights
Other	europeana:unstored

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Metadata for *think*MOTION

Articles/Papers
(from Journals, Conferences, etc.)

Common Term	Europeana Semantic Element
Title/Parallel Title	europeana:title
Language (of title(s))	europeana:language
Author	europeana:creator
Volume	
Issue	
Pages	
Publisher	europeana:publisher
Date of publication	europeana:date
Place of publication	
Language (of content)	dc:language
Rights	europeana:rights
Parent Document	dcterms:isPartOf
Other	europeana:unstored

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Metadata for *think*MOTION

Mandatory Recommended Optional

Patents

Common Term	Europeana Semantic Element
• Publication Number	
• International Classification	
• Title/Parallel Title	• europeana:title
• Language (of title(s))	• europeana:language
• Author/Inventor	• europeana:creator
• Date of publication	• europeana:date
• Language (of content)	• dc:language
• Rights	• europeana:rights
• Other	• europeana:unstored

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Metadata for *think*MOTION

Mandatory Recommended Optional

Brochures
(product catalogues, information material from companies or research institutions)

Common Term	Europeana Semantic Element
• Title/Parallel Title	• europeana:title
• Language (of title(s))	• europeana:language
• Author (company, etc.)	• europeana:creator
• Date of publication	• europeana:date
• Language (of content)	• dc:language
• Content description	• dc:description or dc:tableOfContens
• Rights	• europeana:rights
• Other	• europeana:unstored

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Metadata for *think*MOTION

Mandatory Recommended Optional

Videos/Animations

Common Term	Europeana Semantic Element
• Title/Parallel Title	• europeana:title
• Language (of title(s))	• europeana:language
• Author	• europeana:creator
• Language (of content)	• dc:language
• Content description	• dc:description or dc:tableOfContent
• Date created	• europeana:date
• Resolution	
• Duration	• dcterms:extent
• Rights	• europeana:rights
• Other	• europeana:unstored

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Metadata for *think*MOTION

Mandatory Recommended Optional

Images

Common Term	Europeana Semantic Element
• Title/Parallel Title	• europeana:title
• Language (of title(s))	• europeana:language
• Author	• europeana:creator
• Language (of content)	• dc:language
• Content description	• dc:description or dc:tableOfContent
• Date taken	• europeana:date
• Resolution	
• Rights	• europeana:rights
• Other	• europeana:unstored

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Metadata for *think*MOTION

thinkMOTION

People/Biographies

Common Term	Europeana Semantic Element
• Name/Surname	• europeana:title
• Birth Date	• europeana:date
• Birth Place	• europeana:unstored
• Death Date	• europeana:date
• Death Place	• europeana:unstored
• Main Biography facts	• dc:description

DMG_{LIB}

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Metadata for *think*MOTION

thinkMOTION

Mandatory Recommended Optional

Mechanisms/Physical Models

Common Term	Europeana Semantic Element
• Name	• europeana:title
• Alternative name	• europeana:alternative
• Function	
• Structure	
• Application	
• Collection	• europeana:isPartOf
• Dimension	• dcterms:extent
• Material	• dcterms:medium
• description	• dc:description or dc:tableOfContent

DMG_{LIB}

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Metadata for *think*MOTION

Explanations for europeana:rights

The following rights statements can be used for digital objects that are subject to copyrights held by the data providers or third parties such as authors or distributors. They express that a work is protected by copyright. Europeana provides three different statements that differ in the amount of access an end-user has to the digital object described by the statement. For digital objects where the copyright status is not known (not reserved) to the data provider, Europeana provides an 'unknown' statement.

• Rights Reserved – free access, is applicable when users have free (as in gratis), direct and full access to the digitized object. Needing to register or other administrative procedures in order for users to gain access to the digitized object should not limit the user.

• Rights Reserved – paid access, is applicable when users need to pay data providers to gain access to the digitized work. This can be the case when only a preview is accessible through the portal of a data provider and when registration and payment is required to gain access to the digitized object itself.

• Rights Reserved – restricted access, is applicable when users are limited in accessing a digitized object other than needing payment, for example when registration is required or only snippets or previews are available to users.

• Unknown – applies to objects where the data provider does not have conclusive information pertaining to the rights status of the digital object. This value is only to be used when the copyright status of the work described is unknown. This rights statement can be used by Europeana to exclude items from display.

Please note: The rights statement has an obligation level of "recommended" at the moment. It is anticipated that it will be changed to "Mandatory" for later implementations of the portal.

And: thinkMOTION aims to provide OPEN ACCESS to most of the digital objects.

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Metadata for *think*MOTION

These examples for europeana:isShownBy and europeana:isShownAt are only for your information, as this element will be generated automatically . For *think*MOTION mostly europeana:isShownAt will be applied because the content is shown in a HTML webpage (dmg-lib.org), as in example 3.
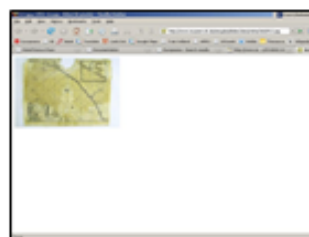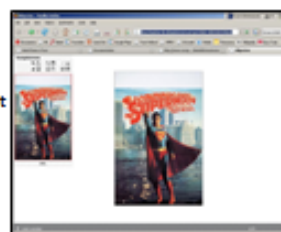
Example 1 – isShownBy
This is clearly isShownby because the URL leads to the JPEG image itself (note the "jpg" extension in the URL).
http://www.museen-sh.de/eingabe/bilder/data/mitte/360/913.jpg

Example 2 - isShownBy
This could be interpreted differently as there is a small set of navigation tools with the image. isShownBy is still appropriate however as there is no other accompanying information – no banner or HTML frame etc. Immediate access to the digital object is the main criterion.
http://resolver.kb.nl/resolve?urn=urn:gvn:RA01:3005 1001544664

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thinkMOTION

TUTORIAL

Simplified Metadata Editor for Documents

Version 1.5
Ilmenau, 2011-05-20

Authors: Benedikt Artelt, Rike Brecht, Ulf Döring, Roger Miller, Birgit Tolkemit

Table of contents

1   What is new in Version 1.5?

The use of the External metadata is explained with more details for the generation of the list of documents which are part of the letter of agreement.

2 Overview

Simplified Metadata Editor for Documents

Enter only those documents whose rights clearance is supposable.
Only those documents whose legal situation concerning usage/copy rights is clear can be digitised, made online available in DMG-Lib and can be taken into account as Europeana item.

Examples

Search for a title | Clear the title field | Add new dataset

Simplified Metadata Editor for Documents

Enter only those documents whose rights clearance is supposable.
Only those documents whose legal situation concerning usage/copy rights is clear can be digitised, made online available in DMG-Lib and can be taken into account as Europeana item.

Examples

Search for a title | Clear the title field | Add new dataset

Title:		+
Authors:		
Part of:		pin
Year:		pin
Type of publication		
Publisher:		pin
Location:		pin
Comment:		pin
External metadata:		

Send new data | Reject new data

With the simplified editor you can

- search for titles and/or,
- enter a first set of metadata for documents and authors/persons into the production database ProDB. This is necessary to prepare the generation of the letter of agreement.

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3   Please note

- *First of all, search for a title before adding a new dataset! This is important to avoid duplicates.*

- *Copy & paste helps to save time!*

- *Respect the already entered metadata!*

- *Never change the identity of a metadata set i.e. a metadata set and the identifying DMG-ID must never be changed in such a way that it describes another document.*

- *Each existing metadata set has a unique and permanent DMG-ID. This DMG-ID is used in many ways, e.g. bookmarks, as reference links between documents within DMG-Lib or by other libraries to reference DMG-Lib documents. If somebody has bookmarked a certain DMG-Lib item, he will be confused if this later leads to a different document. Therefore existing titles should never be modified without very good reason. Only slight corrections can be done e.g. if you have access to the original or the scanned document version.*

4 Which documents should be recorded?

Enter only those documents whose rights clearance is supposable.
Only those documents whose legal situation concerning usage/copy rights is clear can
- be digitised,
- made online available in DMG-Lib, and
- can be taken into account as Europeana item.

Examples

- Documents which should be recorded (i.e. entering metadata in ProDB) and digitised:
  - o The author is dead since at least 70 years ⇒ the document in the public domain
  - o The author is of known identity and/or can be asked easily because of private or professional contacts
  - o The document is published by a publisher with whom the clarification of usage/copy rights was successful. Or the publisher is a university publishing house, the clarification of rights can be easy.

- Documents whose metadata can be recorded but which cannot be taken into account as Europeana items:
  - o The document is important and interesting for DMG-Lib users and already the metadata without access to the digitised full-text enriche the DMG-Lib collection. The digitisation is not possible because of difficult rights clearance. The DMG-Lib users must try to find another access option (purchase or loan). Those documents without digitised full-text cannot be taken into account as Europeana items!

- Documents whose recording and digitising is <u>not</u> meaningful in thinkMOTION project:
  - o The document is published by a considerable publisher (e.g. Springer) ⇒ rights clearance is unlikely and complicated

5 Description of fields for entering metadata

5.1 Fields for entering a new document

This is the simple editor to generate a new document metadata set.

Metadata field	Description	Necessity
Title	The main title of the document. ⚑ *The title is very important to <u>avoid duplicates</u>.* Instructions on page: 12, 14	mandatory (must be filled)
Parallel title	The first title is the main title. Further titles are parallel titles, i.e. translations to other languages ⚑ *It is not necessary to translate the title. You should only use those parallel titles which can be found in the document or e.g. in the library database for copy & paste.* Instructions on page: 14	must be filled if known
Language code of the title/ parallel title	The language code of the title/parallel title. ⚑ *The language of the title or parallel title is not necessarily the language of the document text.* The language code will be used to support translation actions in the future because only the titles will be translated and not full the full text of the documents. The code must be entered according to ISO 639-1 language codes which can be found in the online help for proDB handling. <table><tr><td>de</td><td>German</td><td>cs</td><td>Czech</td></tr><tr><td>en</td><td>English</td><td>hu</td><td>Hungarian</td></tr><tr><td>el</td><td>Greek</td><td>ro</td><td>Romanian</td></tr><tr><td>la</td><td>Latin</td><td>es</td><td>Spanish</td></tr><tr><td>ru</td><td>Russian</td><td>pt</td><td>Portuguese</td></tr><tr><td>fr</td><td>French</td><td>sh</td><td>Serbo-Croatian</td></tr><tr><td>it</td><td>Italian</td><td>zh</td><td>Chinese</td></tr><tr><td>nl</td><td>Dutch</td><td></td><td></td></tr></table> Instructions on page: 14	mandatory (must be filled)

Authors	The name of the author(s) of the document.	must be filled if known
	You can select an author from the proposal list or enter a new author.	
	The author is important for the clarification of <u>copy rights</u> and the preparation of the <u>letter of agreement</u> as well as for the representation of the author's work in the DMG-Lib.	
	While entering the name, the <u>auto completion</u>[1] offers suggestions. The selection of a listed author may save time because you don't have to type the full name. Furthermore it usually avoids entering the same author twice. But of course it cannot be guaranteed; that's the price we pay for a fast entering metadata (a compromise to quality).	
	Instructions on page: <u>15</u>	
Part of	The title of the parent document. For example a proceeding is the parent document of an article.	optional
		strongly recommended if all parts of parent document are entered e.g. all articles of a conference proceeding
	While entering the title of the parent document, the <u>auto completion</u>[1] offers suggestions. The selection of a listed title may save time because you don't have to type the full name.	
	<u>Metadata of the parent document must be entered first</u>, otherwise the parent document can not be found in the list and the link can not be set.	
	According to our experience <u>titles can differ slightly</u>. That's why you should check the auto completion list carefully. Maybe some list entries have a different word order or words are omitted (e.g. 'Proceedings of Gears and Cams Conference' vs. 'Conference Proceeding of Gears and Cams 1999').	
	Instructions on page: <u>17</u>	
Year	The year or date of publication, e.g. 2010 or May 1999, etc.	must be filled if known
	Instructions on page: <u>18</u>	
Type of publication	Select the type of publication • article • book • contribution • dipl. thesis • habilitation • periodical • m.thesis • multipart item • serial bibliography • off print	optional

---

[1] Auto completion involves the program predicting a word or phrase that the user wants to type in without the user actually typing it in completely.

	- part of multipart item - patent - Ph.D - proceedings - report - other - software - standard		
Publisher	The publisher (publishing house). You can select a publisher from the proposal list or enter a new publisher. ⮫ *While entering the publisher, the <u>auto completion</u>[1] offers suggestions. The selection of a listed publisher may save time because you don't have to type the full name. Furthermore, this prevents typing errors.* Instructions on page: <u>19</u>	optional
Location	The location of a publisher (place of publication). You can select a location from the proposal list or enter a new location. ⮫ *While entering the publisher location, the <u>auto completion</u>[1] offers suggestions. The selection of a listed publisher location may save time because you don't have to type the full name. Furthermore, this prevents typing errors.* Instructions on page: <u>20</u>	optional
Comment	If you have internal comments for yourself or other DMG-Lib colleagues, you can enter your notes in the field *Comment*. For example, you are not sure if the title is correct (e.g. "It could be a duplicate of DMG-ID 1234009") ⮫ *Please write the comment in <u>English.</u>* Instructions on page: <u>21</u>	optional
External metadata	External metadata are the original metadata which can be found for example in reference lists of papers, on websites of library databases, etc. The external metadata will be used to generate the list for the contract to obtain copy rights (<u>letter of agreement</u>) because it is usually more detailed than the metadata you can enter in the other fields of the form. External metadata usually includes additional information like page numbers, volume numbers, conference details, etc. ⮫ *Please always use copy & paste to fill in this field.* ☞ *You can enter the external metadata here first to use it for copy and paste to the other fields above.*	must be filled if available

	Instructions on page:	

5.2 Fields for entering a new author

This is the simple editor to quickly generate a new author.

Metadata field	Description	Necessity
Name	The surname of the author.	mandatory
First names	The first name(s) [and middle names or initials as appropriate] of the author as written in the document. Examples: 'John Frederic' or 'John F.' or 'J. F.'	must be filled if known
Born (date)	The date of birth. 📖 *Please use the following format: DD.MM.YYYY* Example: 27.12.2001	must be filled if known
Died (date)	The date of death. 📖 *Please use the following format: DD.MM.YYYY* Example: 27.12.2001	must be filled if known
Location	The location of birth/death.	must be filled if known

👍 **Tips for entering the metadata:**
- If you enter the name in the order 'Surname, First name(s)' during auto completion then the corresponding fields are filled in automatically.
- If you have used the simple editor for entering a new author, the author automatically receives a DMG-ID. The DMG-ID is shown beside the *Authors* field. You can use the DMG-ID link to see the entered metadata and to enter additional metadata of the person.

6 Workflow

6.1 Check if the document's metadata that you want to enter is not already stored in the database

⌨ **First of all, <u>search for a title</u> before adding a new dataset! This is important to avoid duplicates**

Simplified Metadata Editor for Documents

Search for a title | Clear the title field | Add new dataset

Handled docs

Show the last 10 processed documents.

ID	Short Title	Authors	Year	Edit here	Edit on expert pages

1.1 Enter the title to see if the document is already stored in the database.

Simplified Metadata Editor for Documents

Search for a title | Clear the title field | Add new dataset

test

(1980) Test-mechanism science
(2004) Vehicle dynamics observer for a scaled test vehicle
(1996) Basic investigations for the preparation of RRT 3 - Fog chamber test
(2010) High precision test device for calibration of miniaturized three-dimensional magnetic sensors
(2002) Test facility for lateral control of a scaled vehicle in an automated highway system
(2005) Investigations on a Magnetically Guided High-Precision Multi-Coordinate Drive Operated in a Hardware-in-the-Loop Test Rig
(2005) Reiterated tension testing of silicone elastomer
(2003) Uniaxial and equi-biaxial tension tests of silicone elastomer
(2008) Evaluation of tire contact properties using nondestructive testing : part 2: experimental determination and fuzzy model of the cor
(2005) Modellgestützte Methodik zur Erprobung von mechatronischen Antriebsstrangkomponenten
(1995) Synthesis, analysis, design and testing of the masoni continuosly variable transmission

DMG-Lib ID	7379009
Authors	Werff, Klaas/van der; Kalker-Kalkman, Cornelia; Kempes, W.J.J.M.
Publisher	Ed. Unicopli
Location	Milano
Year	1995

atronischer Fahrzeugkomponenten durch ei

(1907) Kinemathics of Maschines
Generate a new document

(<UP>/<DOWN> = Select entries | <ENTER> = Accept)

<ESC> = Close

1.2 While typing in the title, the database automatically suggests (similar) titles which are already stored in the database (<u>auto completion</u>). If you place the mouse cursor over the titles you can see more metadata in an overlaid yellow tool tip. You have three possibilities:

1.2.a Select the title you are looking for.

To review the metadata in more detail **(*)** use the editSimple or editExpert**(**)** links.

Hints	**Simplified Metadata Editor for Documents**						
Doc. input							
List gener.	Search for a title	Clear the title field	Add new dataset				
List recon.							
List manag.							
List final.	**Handled docs**						
Free works							
Statistics	Show the last 10 processed documents.						
All files							
All lists	**ID**	**Short Title**	**Authors**	**Year**	**Edit here**	**Edit on expert pages**	
	10009	Theorie der Getriebe und der mechanischen Messinstrumente	Grashof	1883	editSimple	editExpert	21.10.2010 14:38:46
	25009	Atlas, Theil 1: Eine Sammlung von Mechanismen	Reuleaux	1880	editSimple	editExpert	21.10.2010 14:38:01
	8009	Theoretische Mechanik starrer Systeme	Gravelius	1889	editSimple	editExpert	21.10.2010 14:37:24

1.2.b If the title is not in the list, click on "*Generate a new document*" or "*Add new dataset*" to enter the metadata (see 6.2)

1.2.c Escape

🐾 *According to our experience <u>titles can differ slightly.</u> That's why you should check the auto completion list carefully. Maybe some list entries have a different word order or words are omitted (e.g. 'Proceedings of Gears and Cams Conference' vs. 'Conference Proceedings of Gears and Cams 1999').*

(*) *Each existing metadata set has a unique and permanent DMG-ID. This DMG-ID is used in many ways e.g. bookmarks, as reference links between documents within DMG-Lib or by other libraries to reference DMG-Lib documents. If somebody has bookmarked a certain DMG-Lib item he will be confused if this later leads to a different document. <u>Therefore existing titles should never be modified indiscriminately.</u> Only slight corrections should be made e.g. if you have access to the original or the scanned document version.*

(**) *editExpert is available only for those persons who have taken part in thinkMOTION training activities*

6.2 Title of a new document and language code

The title is taken over automatically in the field *Title.* The *Title* field and the language code are mandatory (must be filled).

Simplified Metadata Editor for Documents

Search for a title   Clear the title field   Add new dataset

Title:	Test-mechanism science en +
Authors:	
Part of:	pin
Year:	pin
Publisher:	pin
Location:	pin
Comment:	pin
External metadata:	

Send changes   Cancel changes

2.1 Enter the language code of the title. See the "Help for proDB handling" for a list of language codes. The language code field is mandatory (must be filled).
2.2 If the document has a **parallel title** in another language, press the +-Button to add another field (see 2.3 – 2.4).

It is not necessary to translate the title. You should only use those parallel titles which can be found in the document or e.g. in the library database to copy & paste.

Enter the parallel title

Simplified Metadata Editor for Documents

Search for a title   Clear the title field   Add new dataset

Title:	Test-mechanism science en
	The first title is the main title. Further titles are parallel titles (translations to other languages).
	Test-Wissenschaft der Mechanismen de - +
Authors:	
Part of:	pin
Year:	pin
Publisher:	pin
Location:	pin
Comment:	pin
External metadata:	

Send changes   Cancel changes

2.3 Enter the parallel title.
2.4 Enter the language code for the parallel title as in 2.1.
It is not necessary to translate the title. You should only use those parallel titles which can be found in the document or e.g. in the library database for copy & paste.

6.3 Author(s)

6.3.1 Select an author

Simplified Metadata Editor for Documents

| Search for a title | Clear the title field | Add new dataset |

Title:	Test-mechanism science	en
	The first title is the main title. Further titles are parallel titles (translations to other languages).	
	Test-Wissenschaft der Mechanismen	de	-		+
Authors:	test
Part of:			pin
Year:			pin
Publisher:			pin
Location:			pin
Comment:			pin
External metadata:	

Dropdown list under Authors:
- test
- test-Smith, John (1913 - 1982)
- test-Miller, Eric (1956 -)
- test1, test1
- Tester, Teo (1980 -)
- Tester, Ute (2001 -)
- Add new author

X

(<UP>/<DOWN> = Select entries | <ENTER> = Accept)

<ESC> = Close

| Send changes | Cancel changes |

3.1 Enter the name of the author in the field *Authors.* The database automatically suggests (similar) names which are already stored in database. If you place the mouse pointer over the names you can see more metadata in a yellow overlaid tool tip. You have three possibilities:

3.1.a Select the name you are looking for.

3.1.b If the name is not in the list, click on "Add new author" to enter the metadata (see 6.3.2)

3.1.c Escape

6.3.2 Add a new author

3.2 Enter the name of the author in the fields *Name, first name.*
3.3 Enter the date of birth in the field *Born (date)*.
  ⚑ *Please use the following format: DD.MM.YYYY*
   Example: 27.12.2010
3.4 Enter the location of birth in the field *Location.*
3.5 Enter the date of death in the field *Died (date).*
  ⚑ *Please use the following format: DD.MM.YYYY*
   Example: 27.12.2010
3.6 Enter the location of death in the field *Location.*
3.7 Press *O.K. button* to send the metadata to proDB
If the metadata of the new author is entered, the proDB automatically generates a new ID number.
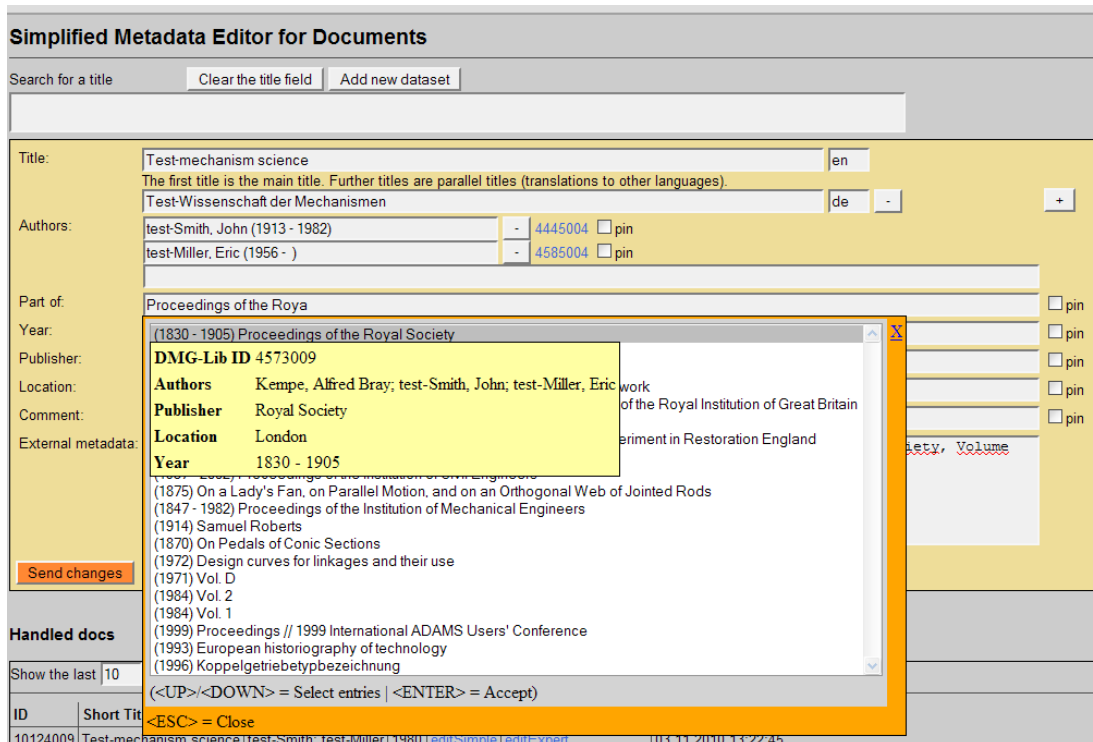

3.8.a If you want to clear the field *Author* press the *- Button*

3.8.b If you are going to enter more documents by this author in the next step, you can pin this author by checking the checkbox *pin.* This is a helpful action to save time because the field *Author* will be pre-filled in the following document with the pinned name.

6.4 Part of

⊡ Precondition: metadata of a parent document must exist so that it can be selected here. If necessary you have to enter the full metadata set of the parent document first.

Simplified Metadata Editor for Documents

Search for a title	Clear the title field	Add new dataset

Title: | Test-mechanism science | en

The first title is the main title. Further titles are parallel titles (translations to other languages).

| Test-Wissenschaft der Mechanismen | de | - | | + |

Authors: | test-Smith, John (1913 - 1982) | - | 4445004 ☐ pin

| test-Miller, Eric (1956 -) | - | 4585004 ☐ pin

Part of: | Proceedings of the Roya | | ☐ pin

Year: | (1830 - 1905) Proceedings of the Royal Society | X | ☐ pin

DMG-Lib ID 4573009

Authors Kempe, Alfred Bray; test-Smith, John; test-Miller, Eric work

Publisher: | **Publisher** Royal Society | of the Royal Institution of Great Britain | ☐ pin

Location: | **Location** London | eriment in Restoration England | ☐ pin

Comment: | **Year** 1830 - 1905 | ☐ pin

External metadata: | | iety, Volume

(1875) On a Lady's Fan, on Parallel Motion, and on an Orthogonal Web of Jointed Rods
(1847 - 1982) Proceedings of the Institution of Mechanical Engineers
(1914) Samuel Roberts
(1870) On Pedals of Conic Sections
(1972) Design curves for linkages and their use

Send changes

(1971) Vol. D
(1984) Vol. 2
(1984) Vol. 1
(1999) Proceedings // 1999 International ADAMS Users' Conference
(1993) European historiography of technology

Handled docs

(1996) Koppelgetriebetypbezeichnung

Show the last 10

(<UP>/<DOWN> = Select entries | <ENTER> = Accept)

ID	Short Tit	<ESC> = Close
10124009	Test-mechanism science test-Smith; test-Miller	1980	edit Simple	edit Expert	03.11.2010 13:22:45

4.1 Enter the title of the parent document in the field *Part of.* The database automatically suggests (similar) titles which are already stored in the database. If you place the mouse pointer over the titles you can see more metadata in a yellow overlaid tool tip. You have three possibilities:
4.1.a Select the title you are looking for.
4.1.b If the title is not in the list, press Escape or the blue cross (X) to close the window. This means you will have to generate a new document to enter the metadata of the parent document.

4.2 If you selected or entered the title of the parent document you can pin the field (similar to 3.8.b).

⊡ Entering the parent document is strongly recommended if all parts of the parent document are to be entered e.g. all articles of a conference proceeding

⊡ According to our experience titles can differ slightly. That's why you should check the auto completion list carefully. Maybe some list entries have a different word order or words are omitted (e.g. 'Proceedings of Gears and Cams Conference (1999)' vs. 'Conference Proceeding of Gears and Cams 1999').

6.5 Year

Simplified Metadata Editor for Documents

Search for a title   Clear the title field   Add new dataset

Title:	Test-mechanism science	en
	The first title is the main title. Further titles are parallel titles (translations to other languages).	
	Test-Wissenschaft der Mechanismen	de - +
Authors:	test-Smith, John (1913 - 1982) (dmgld:4445004) - 4445004 ☐ pin	
	test-Miller, Eric (1956 -) (dmgld:4585004) - 4585004 ☐ pin	
Part of:	Proceedings of the Royal Society	☐ pin
Year:	1980	☐ pin
Publisher:		☐ pin
Location:		☐ pin
Comment:		☐ pin
External metadata:		

Send changes   Cancel changes

5.1 Enter the year of publication in the field *Year*.
5.2 If you entered the year of publication you can pin the field (similar to 3.8.b).

6.6 Type of publication

Simplified Metadata Editor for Documents

Enter only those documents whose rights clearance is supposable.
Only those documents whose legal situation concerning usage/copy rights is clear can be digitised, made online available in DMG-Lib and can be taken into account as Europeana item.

Examples

Search for a title   Clear the title field   Add new dataset

Title:	Test-mechanism science	en
	The first title is the main title. Further titles are parallel titles (translations to other languages).	
	Test-Wissenschaft der Mechanismen	de - +
Authors:	test-Smith, John (1913 - 1982) - 4445004 ☐ pin	
	test-Miller, Eric (1956 -) - 4585004 ☐ pin	
Part of:	Proceedings of the Royal Society	☐ pin
Year:	1980	☐ pin
Type of publication	book	▼
Publisher:		☐ pin
Location:		☐ pin
Comment:		☐ pin
External metadata:		

Send changes   Cancel changes

6.1 Select the publication type.

6.7 Publisher

6.1 Enter the name of the publisher in the field *Publisher.* The database automatically suggests (similar) publishers which are already stored in the database. You have three possibilities:

6.1.a Select the publisher you are looking for and press ENTER.

6.1.b If the publisher is not listed, keep on typing in the full name of the publisher and then press Escape <ESC> to leave auto completion mode. The new name is now in the field.

6.1.c If you change your mind and you don't want to enter a publisher then delete the typed letters and press Escape <ESC>

6.2 If you selected or entered the name of the publisher you can pin the field (similar to 3.8.b)

6.8 Location of the publisher

7.1 Enter the location of the publisher in the field *Location.* The database suggests automatically (similar) locations which are already stored in database. You have three possibilities:

7.1.a Select the location you are looking for.

7.1.b If the location is not listed, keep on typing in the full name of location and press Escape <ESC>

7.1.c If you changed your mind and you don't want to enter a location then delete the typed letters and press Escape <ESC>

7.2 If you selected or entered the location of the publisher you can pin the field (similar to 3.8.b)

6.9 Comment

Simplified Metadata Editor for Documents

Search for a title	Clear the title field Add new dataset

Title:	Test-mechanism science	en
	The first title is the main title. Further titles are parallel titles (translations to other languages).	
	Test-Wissenschaft der Mechanismen	de - +
Authors:	test-Smith, John (1913 - 1982) (dmgId:4445004)	- 4445004 ☐ pin
	test-Miller, Eric (1956 -) (dmgId:4585004)	- 4585004 ☐ pin
Part of:	Proceedings of the Royal Society	☐ pin
Year:	1980	☐ pin
Publisher:	Royal Society	☐ pin
Location:	London u.a.	☐ pin
Comment:	This is just a test-document. Please Ulf delete this dataset.	☐ pin
External metadata:		

Send changes   Cancel changes

8.1 Enter a comment in the field *Comment*.
8.2 If you entered the comment you can pin the field (similar to 3.8.b)

If you have internal comments for yourself or other DMG-Lib colleagues, you can enter your notes in the field *Comment*. For example you are not sure if the title is correct (e.g. "It could be a duplicate of DMG-ID 1234009")

📝 *Please write the comment in English.*

6.10 External metadata

Simplified Metadata Editor for Documents

Search for a title	Clear the title field	Add new dataset

Title:	Test-mechanism science	en
	The first title is the main title. Further titles are parallel titles (translations to other languages).	
	Test-Wissenschaft der Mechanismen	de	-	+
Authors:	test-Smith, John (1913 - 1982) (dmgld:4445004)	-	4445004 ☐ pin
	test-Miller, Eric (1956 -) (dmgld:4585004)	-	4585004 ☐ pin
Part of:	Proceedings of the Royal Society	☐ pin
Year:	1980	☐ pin
Publisher:	Royal Society	☐ pin
Location:	London u.a.	☐ pin
Comment:	This is just a test-document. Please Ulf delete this dataset.	☐ pin
External metadata:	John Smith, Eric Miller (1980: Test-mechanism science, In: Proceedings of the Royal Society, Volume 4, London u.a., Royal Society, pp.502-515	

Send changes	Cancel changes

9.1 Enter external metadata in the field *External metadata*.

This is the original text of the metadata. External metadata usually include additional information like page numbers, volume numbers, conference details, etc.

External metadata and the list of documents for letter of agreement
The external metadata will be used to generate the list of documents for the letter of agreement to get the copy rights because it is usually more detailed than the metadata you can enter in the other fields of this form.

If the field External metadata is not filled the list of documents of the letter of agreement will be generated by the data in the fields of this form.

🔖 *Please always use copy & paste to fill in this field.*
🔖 *Never write any comments in the External metadata because they are used to generate the list of documents (letter of agreement)*
🔖 *Check if the author of your dataset (field Authors) is also in the External metadata.*

👍 *You can enter the external metadata here first to use it for copy and paste to the other fields above.*

t h i n k M O T I O N

TUTORIAL

Simplified Metadata Editor for Persons

Simplified Metadata Editor for Persons

Person search:

	Create new person

Dmg-ID: 0

Name:	
First Name(s):	
Short Description:	

Long Description:

Preview

- Itemizations:
  [ul][li]text1 **[li]**text2 **[li]**text3 etc.**[/ul]**
- forced line break:
  [br], Hint: "usual" line breaks will be took over automatically
- links:
  [a][url]text**[/a]** example url:http://www.dmg-lib.org /dmglib /handler?mcdsc=1821025
- subscript:
  [sub]text which shall be subscripted**[/sub]**

Vita Infos:

What	When	Where (geographic)	Where (institution)	Description	
born					Add

Primary Literature: ?		New Document
Secondary Literature: ?		New Document
Images:		Upload Image >

Annotation:

Write to DB	Reset

Version 1.1
Ilmenau, 2011-02-25
Authors: Benedikt Artelt, Rike Brecht, Ulf Döring

Table of contents

1   What is new in Version 1.1?

There is a new feature for translation of Sort Description, Long Description and the Description field of Vita Info (see **5.2**).

2   Use Mozilla Firefox und JavaScript for proDB

The proDB is a webbased database. For optimal performance you should use the Mozilla Firefox Browser and activate JavaScript.

3   Overview

Simplified Metadata Editor for Persons

Person search:

[   ] [Create new person]

Dmg-ID: 0

Name:	[ ]
First Name(s):	[ ]
Short Description:	[ ]
Long Description:	[Preview] • Itemizations: **[ul][li]**text1 **[li]**text2 **[li]**text3 etc. **[/ul]** • forced line break: **[br]**, Hint: "usual" line breaks will be took over automatically • links: **[a][url]**text**[/a]** example url:http://www.dmg-lib.org /dmglib /handler?mcdsc=1821025 • subscript: **[sub]**text which shall be subscripted**[/sub]**
Vita Infos:	**What** **When** **Where (geographic) Where (institution) Description** [born ▼] [ ] [ ] [ ] [▼] [Add]
Primary Literature: [?]	[ ] [New Document]
Secondary Literature: [?]	[ ] [New Document]
Images:	[ ] [Upload Image >]
Annotation:	[ ]
[Write to DB] [Reset]	

With the **Simplified Metadata Editor for Persons** you can

- search for persons and/or,

- enter new metadata sets for persons into the production database proDB (biographies). This is necessary to prepare the generation of the <u>letter of agreement</u>.

4 Please note

- *First of all, search for a person before adding a new dataset! This is important to avoid duplicates.*

- *Copy & paste helps to save time!*

- *Respect the already entered metadata!*

- *Never change the identity of a metadata set i.e. a metadata set and the identifying DMG-ID must never be changed in such a way that it describes another document.*

- *Each existing metadata set has a unique and permanent DMG-ID. This DMG-ID is used in many ways, e.g. bookmarks, as reference links between documents within DMG-Lib or by other libraries to reference DMG-Lib documents. If somebody has bookmarked a certain DMG-Lib item, he/she will be confused if this later leads to a different document. Therefore existing metadata sets of persons should never be modified without very good reason. Only slight corrections can be done e.g. if you have access to the original or the scanned document version.*

5 Description of fields for entering metadata

5.1 Fields for entering a new person into proDB

This is the simple editor to generate a new metadata set for persons.

Simplified Metadata Editor for Persons

Person search:

| | Create new person |

Dmg-ID: 0

Name:	
First Name(s):	
Short Description:	

Long Description:

Preview

- Itemizations:
  [ul][li]text1 **[li]**text2 **[li]**text3 etc.**[/ul]**
- forced line break:
  [br], Hint: "usual" line breaks will be took over automatically
- links:
  [a][url]text**[/a]** example url:http://www.dmg-lib.org /dmglib /handler?mcdsc=1821025
- subscript:
  [sub]text which shall be subscripted**[/sub]**

Vita Infos:

What	When	Where (geographic)	Where (institution)	Description	
born ▾					Add

Primary Literature: [?]		New Document
Secondary Literature: [?]		New Document
Images:		Upload Image >
Annotation:		

Write to DB   Reset

Metadata field	Description	Necessity
Person search	The search field for searching already entered persons. If the person is in the database you can edit the metadata. If the person is <u>not</u> in the database you can *Create new person* 🕮 *First of all, search for a person before adding a new dataset to <u>avoid duplicates</u>.* 🕮 *While entering the name of a person, the <u>auto completion</u> offers suggestions.* Instructions on page: **10**	mandatory (must be filled)
Name	The surname of the person. 🕮 *It should be the very last word of the name. If it is a legal body/juristic person, all words should be entered here.* Instructions on page: **11**	mandatory (must be filled)
First Name(s)	The first name(s) [and middle names or initials as appropriate] of the person (as written in the document) Examples: 'John Frederic' or 'John F.' or 'J. F.' Instructions on page: **11**	mandatory (must be filled)

Short Description	Short description for the person. A short statement about the person's role in the mechanism and gear science, about his/her work and inventions, or the job title. ⬌ *This field can be translated to different languages.* 🔖 *Do not enter more than 250 characters.* Examples for Franz Reuleaux: German Engineer and scientist, said to be the originator of the scientific kinetics Example for Robert Willis: English mathematician and architect; provides important work to establish the kinetics as science Instructions on page: **11**	mandatory (must be filled)
Long Description	Long description for the person. A long description about the • person's role in the mechanism and gear science, • about his/her work and inventions, • about his/her area of expertise • about his/her attainments ⬌ *This field can be translated to different languages.* Instructions on page: **12**	must be filled if known
Vita Infos	Description of the person's vita. *What* includes the following events or options • *born* • *died* • *other* • *Membership*: • *membership (no time)* • *main creative time* • *location* • *?* *When:* The date of the event or option selected in the field *What*. It also can be a range where the limiting dates are separated by a "-" Pattern: YYYY or DD.MM.YYYY. E.g. 2005; 20.10.1998; 2000-2010; 2.2.1342 - 1345; 123 BC *Where (geographic):* The location/place where this event or option occurred. This should not be the name of a building or equal. *Where (institution):* The institution where this event or option occurred. This should be a building or facility. *Description:* A short description what happened at this event. ⬌ *This field can be translated to different languages.* Instructions on page: **13**	must be filled if known

Primary Literature	Primary Literature embraces documents written by this person, i.e. the person is a kind of author/creator	optional
	If the document is already in the database you can select the title from the list.	
	If the document is not already in the database you can create a new document (⚏ see tutorial for "Simplified Metadata Editor for Documents" for a description of the fields)	
	⚏ *First of all, search for a title of a document before adding a new dataset to* <u>*avoid duplicates*</u>*.*	
	⚏ *While entering the title of the document, the* <u>*auto completion*</u> *offers suggestions.*	
	Instructions on page: **14**	
Secondary Literature	Secondary Literature embraces documents with information about this person, e.g. biography sources.	optional
	If the document is already in the database you can select the title from the list.	
	If the document is not already in the database you can create a new document.	
	⚏ *First of all, search for a title of a document before adding a new dataset to* <u>*avoid duplicates*</u>*.*	
	⚏ *While entering the title of the document, the* <u>*auto completion*</u> *offers suggestions.*	
	Instructions on page: **14**	
Images	Upload an image showing the person.	
	What defines the kind of image	
	• *Person*: image of a person or a group of persons	
	• *Picture* of a model: photograph of a physical model	
	• *Product*: product, machine, case of application	
	• *Document*: e.g. cover of a book	
	• *AIS*: Overview image of a AIS	
	• *Location*: Location, e.g. building, landscape	
	• *Rest*: rest	
	• *Drawing*: drawing of a model	
	• *CAD model*	
	• *solution principle*: representation of a mechanism as a technical principle	
	File is the field for uploading the picture file from your computer. The uploaded files are not automatically online. They must be selected separately in the form for person data (see the tab *Pers?* or *Pers!*)	
	Description: Enter a short name/description of the image (this is mandatory, i.e. it must be filled. If it is not filled the field turns red.)	
	⚏ *To search for an image, enter the title. The auto completion list will show available images.*	
	Instructions on page: **15**	
Annotation	Annotation about the source where the entered metadata come from.	

5.2 Translation feature for selected metadata fields

The fields Short Description, Long Description and Description of Vita Infos can be translated to different languages.

Short Description:	
Long Description:	Short Description: | kqx.gen.unknownbedeut_k X add a language to edit ▾ en [text box] apply <ESC> = Close	Itemizations: **[ul][li]**text1 **[li]**text2 **[li]**text3 etc.**[/ul]** forced line break: **[br]**, Hint: "usual" line breaks will be took over automatically links: **[a][url]**text**[/a]** example url:http://www.dmg-lib.org /dmglib /handler?mcdsc=1821025 • subscript: **[sub]**text which shall be subscripted**[/sub]**

Select the language with "add a language to edit". You can edit the metadata to the following languages:

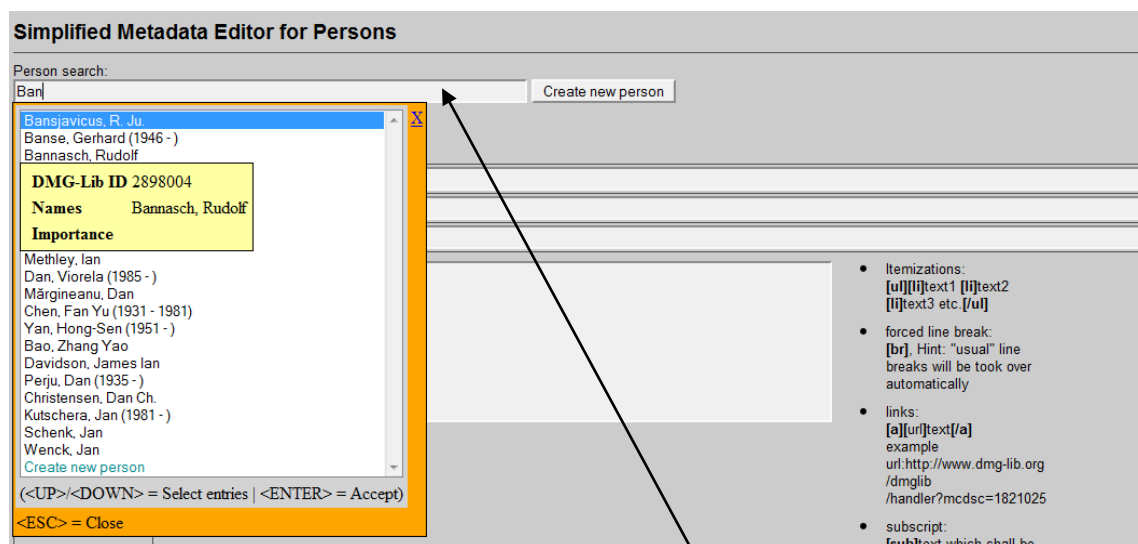| de	German
en	English
fr	French
it	Italian
pt	Portuguese
ru	Russian
es	Spanish
sh	Serbo-Croatian

In the following example you can see that the Short Description is available in English and German.

Short Description:	Engineer
Long Description:	Short Description: | kqx.gen.unknownbedeut_k X [de] "Ingenieur" ▾ en Engineer de Ingenieur apply <ESC> = Close	Itemizations: **[ul][li]**text1 **[li]**text2 **[li]**text3 etc.**[/ul]** forced line break: **[br]**, Hint: "usual" line breaks will be took over automatically links: **[a][url]**text**[/a]** example url:http://www.dmg-lib.org /dmglib /handler?mcdsc=1821025 subscript: **[sub]**text which shall be subscripted**[/sub]**

6 Workflow

6.1 Check if the person's metadata that you want to enter is not already stored in the database

⊞ **First of all, <u>search for a person</u> before adding a new dataset! This is important to avoid duplicates**

Simplified Metadata Editor for Persons

Person search:
Ban|

Create new person

Bansjavicus, R. Ju.
Banse, Gerhard (1946 -)
Bannasch, Rudolf

> **DMG-Lib ID** 2898004
>
> **Names**   Bannasch, Rudolf
>
> **Importance**

Methley, Ian
Dan, Viorela (1985 -)
Mărgineanu, Dan
Chen, Fan Yu (1931 - 1981)
Yan, Hong-Sen (1951 -)
Bao, Zhang Yao
Davidson, James Ian
Perju, Dan (1935 -)
Christensen, Dan Ch.
Kutschera, Jan (1981 -)
Schenk, Jan
Wenck, Jan
Create new person

(<UP>/<DOWN> = Select entries | <ENTER> = Accept)

<ESC> = Close

- Itemizations:
  [ul][li]text1 **[li]**text2
  [li]text3 etc.**[/ul]**

- forced line break:
  [br], Hint: "usual" line breaks will be took over automatically

- links:
  [a][url**]**text**[/a]**
  example
  url:http://www.dmg-lib.org/dmglib/handler?mcdsc=1821025

- subscript:
  [sub]text which shall be

2.1.1 Enter the name of the person to see if the person is already stored in the database.

While typing in the name, the database automatically suggests (similar) persons which are already stored in the database (auto completion). If you place the mouse cursor over the titles you can see more metadata in an overlaid yellow tool tip. You have two possibilities:
  2.1.1.a Select the person you are looking for. Now you can review the metadata in more detail and/or edit the metadata[(*)].

  2.1.1.b If the person is not in the list, click on "*Create new person*"

⊞ *According to our experience <u>names can differ slightly.</u> That's why you should check the auto completion list carefully. Maybe some list entries have a different word order or words are omitted (e.g. 'Miller, Roger or Miller, R.).*

[(*)] *Each existing metadata set has a unique and permanent DMG-ID. This DMG-ID is used in many ways e.g. bookmarks, as reference links between documents within DMG-Lib or by other libraries to reference DMG-Lib documents. If somebody has bookmarked a certain DMG-Lib item he will be confused if this later leads to a different document. <u>Therefore existing metadata sets should never be modified indiscriminately.</u> Only slight corrections should be made e.g. if you have access to the original or the scanned document version.*

6.2 Name

Simplified Metadata Editor for Persons

Person search:

[   ] [Create new person]

Dmg-ID: 0

Name:	Bank
First Name(s):	
Short Description:	
Long Description:	• Itemizations: [ul][li]text1 [li]text2 [li]text3 etc.[/ul]

2.2.1 Enter the last name (surname) of the person. It should be the very last word of the name. If it is a legal body/juristic person, all words should be entered here.

6.3 First name

Simplified Metadata Editor for Persons

Person search:

[   ] [Create new person]

Dmg-ID: 0

Name:	Bank
First Name(s):	Roger
Short Description:	
Long Description:	• Itemizations: [ul][li]text1 [li]text2 [li]text3 etc.[/ul]

2.3.1 Enter the first the first name(s) of the person. This should be all words before the last name. If it is a legal body/juristic person, this field is to be left empty.

6.4 Short description

Simplified Metadata Editor for Persons

Person search:

[   ] [Create new person]

Dmg-ID: 0

Name:	Bank
First Name(s):	Roger
Short Description:	English engineer and physicist
Long Description:	• Itemizations: [ul][li]text1 [li]text2 [li]text3 etc.[/ul]

2.4.1 Enter a short description of the person.

That is a short statement about the person's role in the mechanism and gear science, about his/her work and inventions, or the job title.

⟨⊛⟩ *This field can be translated to different languages.*

🔖 *Do not enter more than 250 characters.*

6.5 Long description

Simplified Metadata Editor for Persons

Person search:
[   ] [Create new person]

Dmg-ID: 0

Name:	Bank
First Name(s):	Roger
Short Description:	English engineer and physicist
Long Description:	Roger Bank worked as engineer for the royal house. He constructed a goods lift for the kitchen service. Bank also worked at London university as scientist and published articles in the fields of [ul][li]belt and chain drives[li]wedge mechanism.[/ul] He was the Ph.D. supervisor of [a][http://www.dmg-lib.org/dmglib/handler?biogr=1419004]John Farrey[/a].

Itemizations:
[ul][li]text1 **[li]**text2 **[li]**text3 etc.**[/ul]**

forced line break:
[br], Hint: "usual" line breaks will be took over automatically

links:
[a][url**]**text**[/a]** example url:http://www.dmg-lib.org /dmglib /handler?mcdsc=1821025

subscript:
[sub]text which shall be subscripted**[/sub]**

[Preview]

Roger Bank worked as engineer for the royal house. He constructed a goods lift for the kitchen service. Bank also worked at London university as scientist and published articles in the fields of

- belt and chain drives
- wedge mechanism.

He was the Ph.D. supervisor of John Farrey

2.5.1 Enter a long description of the person. For example:
- person's role in the mechanism and gear science,
- about his/her work and inventions,
- about his/her area of expertise
- about his/her attainments

◀◉▶ *This field can be translated to different languages.*

⌂ For formatting the text you can use the notation guidelines on the right sight of the entry field. To see the results of the formatting click on *Preview*.

6.6 Vita infos

2.6.1 Enter the description of the person's vita. Use the different fields and click "*Add*". The result is shown underneath.

You can edit the entries by clicking on "*E*".
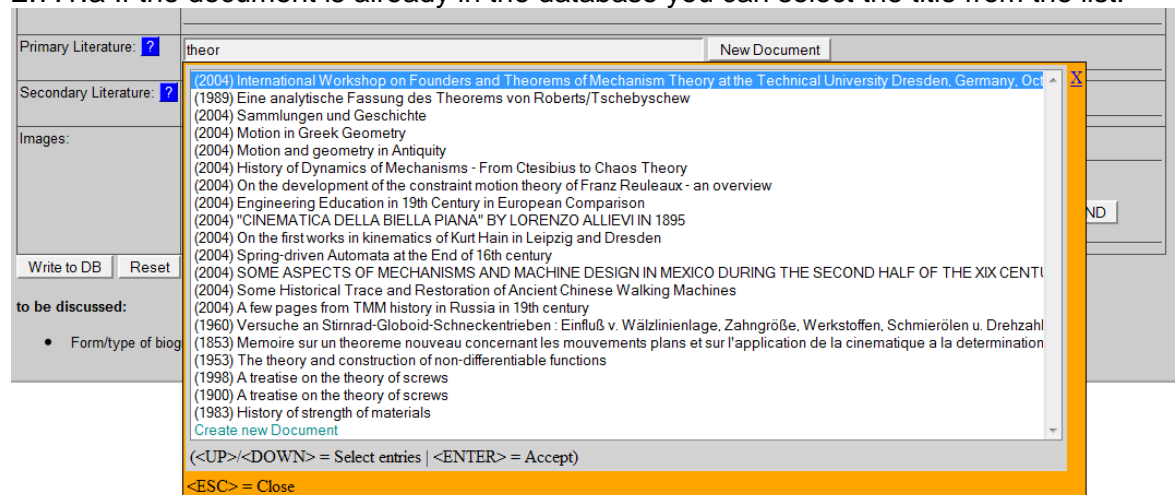You can delete entries by clicking on "–".

Description of fields

What (type of event)	
born	Date of birth
died	Date of death
other	If you can't assign your data to one of the fields than use *other*
membership	Membership including information about time
membership (no time)	Information about membership (time not specified)
main creative time	Main creative time (point or period)
location	Information about place and time, but not about the activity
?	? (this field will be deleted soon)

When
The date of the event or option selected in the field *What*. It can also be a range, i.e. the limiting dates are separated by a "-" Pattern: YYYY | DD.MM.YYYY [- YYYY | DD.MM.YYYY]. E.g. 2005; 20.10.1998; 2000-2010

Where (geographic)
The location/place where this event or option occurred. This should not be the name of a building or equal.

Where (institution)
The institution where this event or option occurred. This should be a building or facility.

Description
A short description what happened at this event. ⟨⊛⟩ *This field can be translated to different languages.*

6.7 Primary and secondary literature

2.7.1 Enter the title of the document which is written by this person, i.e. the person is a kind of author/creator.

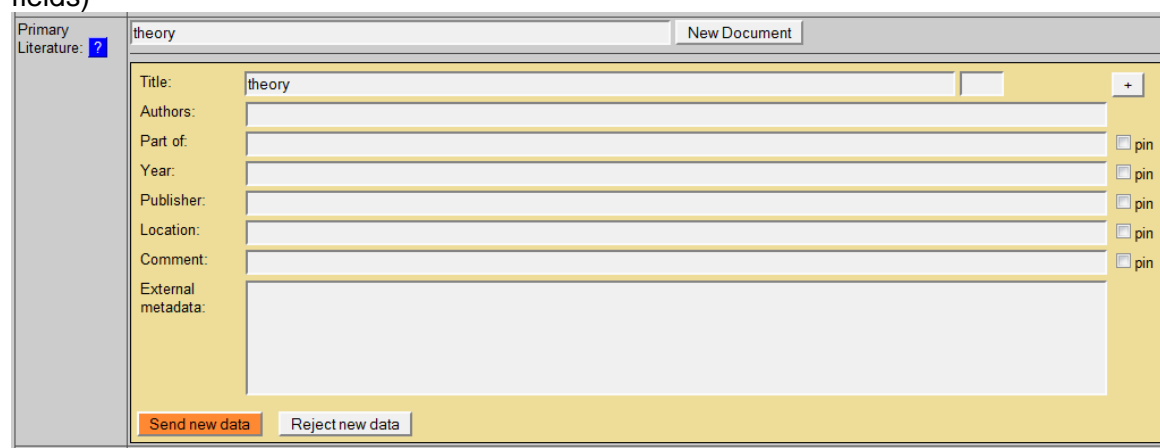2.7.1.a If the document is already in the database you can select the title from the list.

2.7.1.b If the document is not already in the database you can *Create a new document*. Now you have the following possibilities concerning the field *Authors*:

- You can leave this field blank if the author is the only person you are entering the metadata set for at the moment (the person has no DMG-ID until you write the data to DB). The document is automatically related to the person after writing the data to DB.
- You can select the co-authors in the auto-completion list. The document is automatically related to the co-authors AND the person you are working on after writing the data to DB.
- You can write the other person metadata (name, first name(s), descriptions, vita infos, images) to database. Then you can use the "Simplified Metadata Editor for Documents" to enter the literature.

(🏳 see tutorial for "Simplified Metadata Editor for Documents" for a description of the fields)

🏳 *First of all, search for a title of a document before adding a new dataset to <u>avoid duplicates</u>.*
🏳 *While entering the title of the document, the <u>auto completion</u> offers suggestions.*

6.8 Image

Upload or select an image of the person. There are two possibilities:

2.8.1 Start to enter the title of the image in the field, the list will show you available images. Select the image you are looking for or upload a new image.

2.8.2 If the image is not already available in the database upload a new one.
a) Select the kind of image in the field *What*
- *Person*: image of a person or a group of persons
- *Picture* of a model: photograph of a physical model
- *Product*: product, machine, case of application
- *Document*: e.g. cover of a book
- *AIS*: Overview image of a AIS
- *Location*: Location, e.g. building, landscape
- *Rest*: rest
- *Drawing*: drawing of a model
- *CAD model*
- *solution principle*: representation of a mechanism as a technical principle

b) Search and select the image on your computer in the field *File*
c) Enter a short name in the field *Description* (this is mandatory, i.e. it must be filled).

6.9   Annotation

Enter the source of the entered metadata to reproduce where they come from (e.g. URL, document metadata, DMG-Lib ID, etc.)