

DAR User and Style Guide

Version 2

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This Guide serves as a reference for students who work with the Digital Archiving Resources (DAR)—an initiative to build, use, and preserve digital archives. It was created following the experiences of the initial group of students who created the system.

As a student working on the DAR project, you will use this Guide to help make decisions about style, metadata, how to use the systems involved, and more.

As more students use DAR the Guide should be updated and the new version should be uploaded to Omeka as the current documentation. Old versions should be kept in order to show the system's growth and progression throughout time.

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Selection Criteria

Initially, each team member should find an agreed-upon number of sources on their own. Items should be selected that correspond to issues and topics related to digital archiving. When selecting items, consider the categories in place and their descriptions and select items that

correspond to those particular criteria. Also consider relevance to the current state of digital archiving. Older items may still be relevant, but many may be outdated as technology develops. Some older items that no longer seem relevant may be considered as historical documentation of the field.

If you find items that do not seem to belong in an existing category but that seem significant to digital archiving, create a new category and give it a clear description that may be used to select items for that category in the future.

After each team member has found a number of items, the team should meet to discuss inclusion of each item. This discussion should include the issues of

- Item duplication if more than one member has found similar or the same items,
- Relevancy to the field of digital archiving,
- Whether the item should be considered currently relevant or historical, and
- A team decision about which category the item belongs in

The team should make a group decision about what items will be included in the final upload to add to the archive.

Items are collected on a one-time basis, so the team does not need to consider updating items to new versions unless they feel that an update would make a significant difference to the item. If so, then the updated version should be added as a new item and labeled as a different version of the previous item.

Annotation Guidelines

Citations should be done according to the most current edition of the Chicago Manual of Style. Annotations should be 200-225 words (single-spaced), and should “summarize” the source in one paragraph and “evaluate” it (in one or two sentences) in a second paragraph. Choice of action words such as “explains” and “argues” should be varied.

Using the Systems

Sources will initially be collected in Zotero (<http://www.zotero.org/>) and will then be uploaded and edited in Omeka.

Using Zotero

For initial collection of sources group members should use Zotero. Each group member should create their own account, and then one group member should create a group. The group should be set to Public, Open Membership, and to where only members can view and edit. Once the

group member has created the group, he or she should invite the other group members to join using the email addresses they use to sign up for Zotero.

The initial group is titled ENG6939UCF. Titles of new groups should follow the format: Class#UCF_Semester. For example, if the course were taught in the fall of 2012, the group name will be:

ENG6939UCF_Fall2012

If there is more than one group per class, the group number may be added to the end of the title. In the previous example, the title for group one will be:

ENG6939UCF_Fall2012_Group1

Each group member will initially collect items in his or her own Zotero account. After the group has met to decide on what sources to include (See Selection Criteria), each member will ensure that the items are properly documented, then will put them in the group library. Primary fields that would be necessary for bibliographic information (title, author, etc.) should be filled in, but extra information such as tags or annotations should be blank. Keep in mind that once an item has been uploaded to the group, any adjustments that the individual owner makes to the item in his or her own personal Zotero will not be transferred to the item in the group library.

Using Omeka

Access to Omeka will be provided by the professor. Students will log into the website specified by the professor using the username first initial last name. For example, John Smith's username will be jsmith. Passwords will be set up by students.

Once all the items are loaded into the group library, the library should be uploaded to Omeka. This can be done through the Zotero Import tab in Omeka.

To locate the Zotero Atom Feed URL, log into Zotero through a web browser. Once you are logged in, go the Groups tab. Under the group name, click on the "Group Library" link. At the bottom of the page, you will see a "Subscribe to this feed" link. On the next page, copy the URL from the address bar in your browser. Copy this link into the Zotero Atom Feed URL field in Omeka. Do not enter a Private Key. Click "Continue" and Omeka should import all the items in the Zotero group.

If items need to be changed, added, or edited after the initial upload, make any changes in Omeka. Re-uploading from Zotero will not update items, but rather will duplicate every item in the group.

Next, students will edit individual items by browsing to the “Items” tab. Students will click on the desired item and then click on “Edit this Item.” The fields specified in the Style Guide should be filled out. Hypertext should be implemented, when possible, using the “Use HTML” button.

Then, students will navigate to the “Item Type Metadata” tab on the right side on the page. If the available options do not fit the item, students should add additional categories by navigating to the “Item Types” tab on the top toolbar.

Students will then need to go to the “Zotero” tab on the right hand column and delete most items as specified in the Style Guide. Next, the “Collection” tab will allow students to choose the collection for the item and the “Files” tab will allows students to upload the thumbnail of the item. Finally, the “Tags” tab will allow students to review the tags imported from Zotero. These can be deleted and added to according to the specified controlled vocabulary.

Lastly, students should click “Save Changes” and make the item public by clicking the check box on the top left of the page.

Student can “View Public Site” to see if any editing needs to be done.

Metadata Standards

Use the charts below to make decisions regarding metadata for each object. Any field that is not listed in the Guide should be left blank.

Dublin Core Fields

Title	Title of the source
Subject	LOC Subject Headings
Description	Group description <ul style="list-style-type: none"> • 1st half of annotation
Abstract <i>This will appear to users as “Publisher’s Abstract”</i>	Official abstract from creditable source <ul style="list-style-type: none"> • E.g. Amazon summary, LOC, the publisher, etc.
Table of Contents	When available <ul style="list-style-type: none"> • If publisher has assigned numbers, use those numbers • If publisher has not assigned numbers, begin each new line with * for first level or - for second level • List subsections where available
Creator	Author or creator
Publisher	Publishing Organization <ul style="list-style-type: none"> • For conferences: Sponsoring Organization
Date	YYYY-MM-DD

	<ul style="list-style-type: none"> Books: Publication Date Videos/Audio: Date Uploaded and made publicly available Web site: Date first uploaded, if available. If not, date of last modification if available Videos/Audio: The original date the event happened
Date Modified	<p>If relevant/available</p> <ul style="list-style-type: none"> If multiple dates, separate with semicolons
Is Format of	<p>If an item has a version in another format, include the citation for the format that is <i>not</i> being archived.</p> <ul style="list-style-type: none"> E.g. If archiving a digital e-book, this would be the citation for the print version of the book
Is Part of	<p>If an item is part of a larger work or body of work, include the citation for the larger work</p> <ul style="list-style-type: none"> E.g. Book chapters, magazine articles, conference proceedings, etc.
Type	<p>Use type from controlled vocabulary list below.</p> <ul style="list-style-type: none"> If nothing seems to fit, create a new category and add your format to the vocabulary list
Bibliographic citation	<p>Citation of the item being archived</p> <ul style="list-style-type: none"> Include hyperlinks to any URLs
Instructional Method <i>This will appear to users as "Note and Commentary"</i>	<p>2nd half of annotation</p>

Zotero fields (to be edited in Omeka)

URL	<p>If available, include the URL as a hyperlink</p>
ISBN	<p>For books</p> <ul style="list-style-type: none"> Use 13 digit ISBN (the one beginning with 9) No Dashes or spaces between numbers
Num Page	<p>Number of pages where appropriate (books, PDFs, etc.)</p> <ul style="list-style-type: none"> Just the number (no "p." or "pages")
Edition	<p>Where appropriate</p> <ul style="list-style-type: none"> Format, e.g. "3rd ed."

Tags

- All lower case
- Use tags from controlled vocabulary list. If none seem to fit, create a new tag and add your new tag to the list
- Minimum of two tags per item

Controlled Vocabulary

Tags:	archive EAD - encoded archival description markup language metadata standards archival standards open access digital humanities web research ethics preservation born digital authenticity digitization
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Types:	Book Ebook Journal Online Journal Presentation Moving Image (<i>Video</i>) Website (<i>Web Page</i>) Report Sound (<i>Audio Recording</i>) Conference Proceeding
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Thumbnail images

Thumbnails should be included for each item. The total thumbnail size should be 200x200 pixels. Within the 200 pixels, the image should have a width of 125 pixels with the proportional height for the image.

Checklist

Use this checklist in conjunction with the lists above to ensure that metadata is entered properly for each item:

- Are all relevant and available fields above included?
- Are fields not included above empty?
- Are all links active?
 - To make links active: Check “use HTML” then put the cursor directly after the link and press the spacebar. Make sure the link turns blue. If this does not work, highlight the ULR and press the “link” button (looks like a short chain). Paste the URL into both the “Link URL” and “Title” input boxes.
- Are all items included in a collection?

- Do all items have at least 2 tags?

Copyright

- Thumbnails are not copyright protected and may be used without acquiring permissions. However, use of full images does require permissions from copyright holder
- If anything that requires copyright permissions is posted in the archive, the team should contact the copyright holder to obtain permissions to include the item. If the team cannot get permissions, then a live URL link to the item should be included in the appropriate fields.

Tasks for Future Students

- Try to appropriate copyright permissions for items to include in the archive and add those items to the archive once permissions are granted
- Create a policy for archiving the DAR
- Create and implement a policy for archiving DAR itself