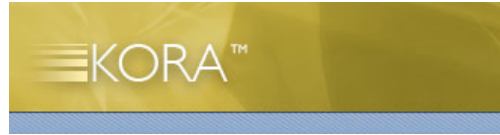


THE QUILT INDEX



Tutorial for MSU's "KORA"

Introduction

Welcome to the Quilt Index and thank you for participating in this project. The Quilt Index is a partnership project of the *Alliance for American Quilts*, Michigan State University's *MATRIX: The Center for Humane Arts, Letters, and Social Sciences Online*, and the *Michigan State University Museum*.

The Quilt Index operates through MATRIX's digital library repository, called KORA (<http://www.matrix.msu.edu>). This digital library management system is, in essence, a very large database. Contributors have password-protected web pages to access their own records, which they use to enter ("ingest"), edit, and verify data, as well as to upload images. KORA works best with the Firefox browser for both PC and Mac users. You can download Firefox at this web address: <http://www.mozilla.com/en-US/firefox/>.

Feel free to contact Quilt Index staff Mary Worrall (Worrall@msu.edu) and Justine Richardson (justine.richardson@matrix.msu.edu) with questions as you work with your records. Please send messages to both these e-mail addresses for promptest response time.

Tutorial Contents

The Quilt Index (QI) system in KORA has entry forms (called "schemes") for entering and managing quilt data records. In order to teach you more about entering and managing data records, we've put together this training document. A glossary can be found at the end of this document.

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1. Creating and Activating a New Account

Each person from your organization who will be editing or managing records will need to create a new account. We recommend that at least two people from each group know how to manage records. You may also create an organizational account.

To create a new account,

1. Go to the repository: <http://quiltindex.kora.matrix.msu.edu/login.php>.
2. Click **New Account**.
3. Enter a username.
We recommend using your name for this (e.g. "justine.richardson").
4. Choose a password.
Be sure to write it down somewhere that you'll remember!
5. Enter the e-mail address you will use to manage this account.
Your full name, organization, and language are optional.
6. Click **Create**.
The page should then read: "Your account has been created. Please check your e-mail for instructions on how to Activate Your Account."

To activate your account,

1. Check your e-mail for a message from "KORA Activation" with the subject line "KORA Account Activation."
If you do not receive an e-mail within 10 minutes, check your junk or spam mailbox.
2. Activate your account by following the instructions and link in the KORA Account Activation e-mail.
This account activation e-mail and link are time sensitive. You must look at this e-mail and activate your account within 24 hours, or you'll have to create a new account.
3. E-mail the Quilt Index (QI) project staff with your activated username, and we will assign you to the correct project.
After you have created your account, you MUST e-mail QI project staff with your username so that we can add your organization's project to your user account. If you can log in, but you see this message: "You are currently not a member of any active projects," that means we have not yet connected your project to your new user account.

2. Creating ("Ingesting") a New Quilt Record

Once you have created your account, you can begin creating quilt records. Creating a record is called "ingesting" in KORA. You ingest records by entering information into "schemes," which are essentially information forms.

To ingest a new record,

1. Go to <http://quiltindex.kora.matrix.msu.edu/login.php>.
2. Log in.
3. Click on your project name.
If you see this message: "You are currently not a member of any active projects," e-mail Quilt Index staff with your username.
4. Click on the Scheme name from Scheme Selection list.
*The scheme name for entering quilt records will either be the same as your project name (for the earliest contributors) or **comprehensive_fields**. (see Figure 1 below)*

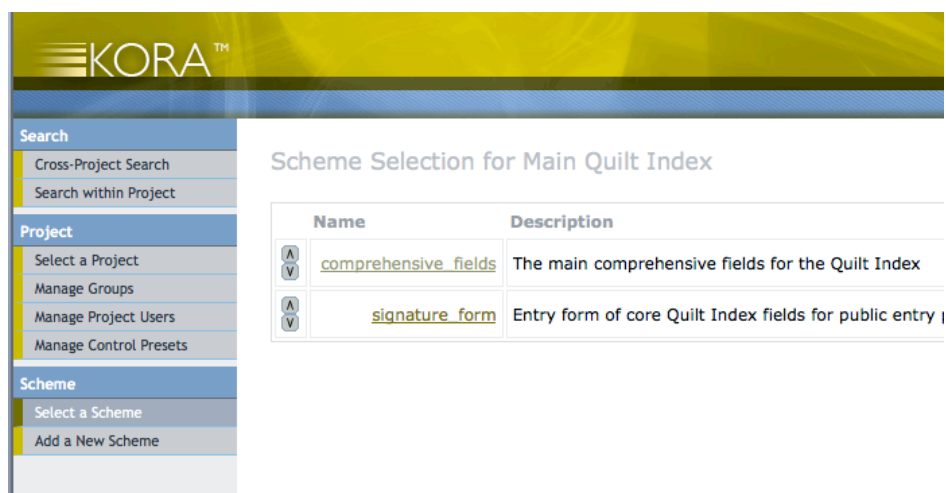


Figure 1: The Scheme Selection Screen

After you select the `comprehensive_fields` Scheme, an additional menu will appear below the main menu in the left navigation. This menu has links to options such as **Search within Project**, **Ingest Record**, **List Scheme Records**, etc. These links provide nearly all of the tools necessary to add and edit content within the Quilt Index system. The next sections of this tutorial will explain how several of these tools work.

3. Creating a New Quilt Record from a Blank Data Entry Form

The data entry form for the quilt records is organized in pages, with groups of fields on each page. according to the groups in the Quilt Index Comprehensive Fields, which is the main full set of potential data fields that can be used. These fields contain necessary information and controlled vocabularies specific to quilt research and study. (Note: The most updated version of these fields is available on the Quilt Index website on the "About" page at <http://www.quiltindex.org/about.php#compfields>. Click the PDF link for "Comprehensive Fields.")

To create a new quilt record,

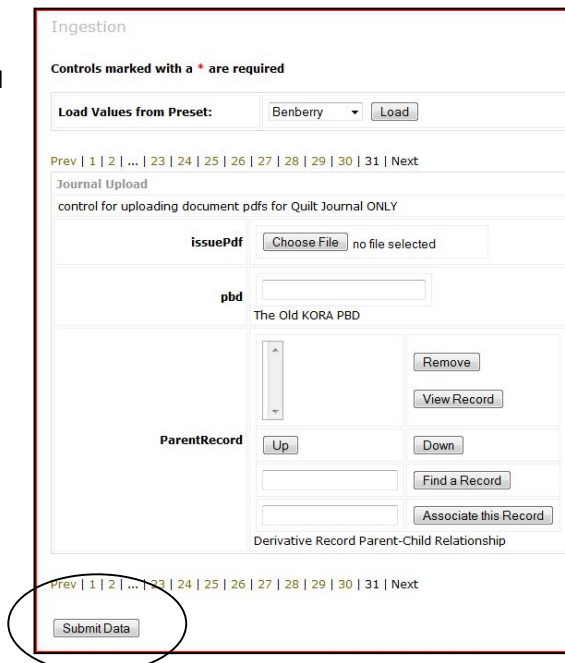
1. Click **Ingest Record** in the left-hand side menu.
2. Input information into the fields.
In 'Ingest Record' mode, each field has three basic components: the field code, the box for selecting or entering data, and a description of what's contained in the box. (See Figure 2.)
3. To save the record, press **Submit Data** at the bottom of any page of the data entry form (see Figure 3).
*The information you have entered will not be saved until you submit the record by clicking the **Submit Data** button.*



Figure 2: In "Ingest Record" mode, for each data field, you will see a field code (left), a box for data entry (right top), and a description of the field code (right bottom)

After clicking **Submit Data** you should see the message "Object Ingested" with a link back to view the record you just submitted. If there is an error, such as a required field that is not entered or a field that is formatted incorrectly, you will get a message about which field needs to be changed. To fix this problem, correct that field and click **Submit Data** again.

The initial object ingestion ensures that your record is saved in the repository. Once the record is successfully submitted, you can return and find this record. Any of the information can be edited later or new information can be added to fields left empty. You will always be able to edit your records.



4. Entering Data into a Record (a few tips)

This page offers three sets of suggestions for entering data.

Avoid the “enter” key

Be careful not to hit your "enter" key while you are entering data. In some computers and browsers, this can remove you from the "ingest record" mode.

Recognize the type of data entry field you’re working with

- In some fields, only one option can be selected from a list. The options in single selection fields are displayed within a drop-down menu.
- In other lists, you can make multiple selections. The options in multiple selection fields are displayed within a clickable menu. In the example in Figure 2, above, InstContrF003 is a multiple-selection list.
- Fields with textboxes allow you to enter text in an open entry form.
- Multi-Text (or Multi-Name) fields allow to add multiple pieces of data by clicking **Add**. (See Figure 4.) Text entered in the text box will be shown in the list above the **Up** and **Down** buttons. *To delete an entry in this type of field, click the entry to select it, and then click **Remove**. You can also arrange the order of multiple entries using the **Up** and **Down** buttons.*

Figure 4: The Multi-Text (or Multi-Name) Field.

Use recommended formats in some fields

- When entering a **date**, the preferred method is month-date-year: mm-dd-yyyy or c. yyyy.
- **Names** should be entered as “lastname, firstname.”
- If a field asks for a **measurement**, please specify unit of measure (e.g. “inches”). The unit of measure can be preset.
- For **field 67a (ExhibitListFO67a)** the recommended format is Exhibitions: “Name of Exhibit,” Curator or Project Director (if applicable), Exhibit Location, City, State/Province, Country, Dates of Exhibit.
- *If exhibited at multiple venues, separate venues and dates by a semicolon within the citation, (e.g. Exhibit location 1, Dates 1; Exhibit location 2, Dates 2; etc.)*
- For **field 71a (ContestList071a)**, the recommended citation format is “Contest Name,” Contest sponsor (if applicable), Contest Location, City, State/Province, Country, Dates of Contest.
- **Field 88a** is used for information about publications related to the quilt.

5. Finding and Editing Existing Records

Once logged into your project, you can search for records you have already entered. On the left hand navigation on any KORA page you can use **Search within Project** link to find records in your project using any keywords.

To search records within a project,

1. Click **Search within Project** in the left-hand navigation.
The search screen should look like Figure 5.
2. Type the search term in the box next to “Keywords”
3. Select the Scheme you wish to search within (if seeking a quilt, select “comprehensive_fields”, or use the default “All” setting.)
4. Click **Search**.
A list of records with text matching your search terms in any searchable field will be returned. The short versions of the records are displayed on the search results page.
5. Click any object’s KORA identifier to view the full record (all the metadata fields).
The KORA identifier, or KID, will be listed at the top of the record, for example “1A-AA-2B”.)

The screenshot shows a search interface titled "Search: Main Quilt Index". It includes a "Scheme:" dropdown menu currently set to "All", a "Keywords:" text input field, and two radio buttons labeled "Any" (which is selected) and "All". Below these is a "Search" button.

Figure 5: The Search Box in KORA

To search directly by KORA ID (KID#)

If you already have the KID# for the record (for example, you can copy the KID# , such as “1A-AA-2B”, from the URL of a quilt that is already live in the Quilt Index public website), once logged in to any page in KORA, you can enter that KID number in the “View Record” box in the very top banner to go directly to that record.

To use advanced search features,

1. Click **Advanced Search within Scheme**
2. Enter your search terms in a particular data field. KORA will only search for records with the text
3. Advance Search allows you to search for a particular text in a particular field. The options for advanced search fields can be changed by the project administrator. The standard set of fields for advanced search are:
 - Inventory and alternate inventory numbers (InstInvContrNumF004, InstInvContrNumF004a)
 - Quilt title (QuiltTitleF009)
 - Quilt top maker (QuiltTopF054)
 - Quilt owner name (OwnerNameF010)
 - Location made (LocMadeF057a)
 - County (ProvCountyF057b)

If you had previously set other data fields for advanced searching, they should still be available to you. If you find other fields that are useful for searching in your project, you can set those to be included in the advanced search as well. KORA allows you to choose any individual field and add it to the advanced search within Scheme. Communicate with the QI staff to add additional fields to your advanced searching page.

To see a list of all your scheme records,

After you are logged in and you have selected your project and your scheme (“comprehensive_fields” for quilts), you can click on “List Scheme Records” to view all records you have entered into that data entry scheme. While

there are specific instances in which this is useful, you will usually find it much easier to search the Scheme for an individual record rather than reading through a list of every record in the system. *(NOTE: Records are listed according to the order in which they were ingested, not by the contents of any field.)*

To sort your results,

You can sort your results by various fields when using the **Advanced Search within Scheme** features.

To edit an existing record,

Follow these steps to update or edit existing data information for records in KORA:

1. Search and find the record ("object") you need to update/edit.
2. Click on the identifier link for the object requiring edits/updates (*NOTE: The KORA identifier, or KID, is listed at the top of the record, for example "1A-AA-2B".*)
3. Click **Edit** from the area above or below the record contents.
4. Locate the field(s) that require updating/editing by scrolling/clicking through the metadata entry form.
5. Update or edit the appropriate field(s).
6. Click **Submit Data**, which is located at the bottom of each page of data entry. (*NOTE: In order to enter the changes that you make to the record, you MUST click **Submit Data**.*)

If the edit was successful, you will see the message "Object Ingested", with a link to "View Record". Click "View Record" to go to the full-display page for the updated record. You will see all of the metadata for the object on this page. Check these fields to verify that the updated information was saved in the appropriate fields.

6. Uploading or Replacing Images in Existing Records

You can add images to records without images, and you can also remove uploaded images and add new ones. This process is similar to attaching an image or document to an e-mail message.

1. Log in, select your project, and select your scheme (e.g. "comprehensive_fields" for quilt records)
2. Click **Search within Project**, or **Advanced Search within Scheme** to find the record you need to update/edit.
3. Click on the identifier link for the object requiring edits/updates. (*NOTE: The KORA identifier, or KID, is listed at the top of the record, for example "1A-AA-2B".*)
4. Click **Edit this Record**, which is located in the area above the record.
5. Go to the **Submit Data** page. *Submit Data* is usually located on page 30 of the data entry form.
6. Click **Choose File** under "ReposFile" to find the image you want to upload. (*NOTE: Under "zoom," click **Choose File** to find a high-resolution copy of that same image. The "zoom" control is used for entering a high resolution image for zooming. Zooming image suggested file size is 4MB, 1424 px wide.*)

To replace an existing image,

1. Search and find the record you need to update/edit.
2. Click on the identifier link for the object requiring edits/updates. (*NOTE: The KORA identifier, or KID, is listed at the top of the record, for example "1A-AA-2B".*)
3. Click **Edit**, which is located in the area above or below the record.
4. Go to the **Image Upload** page, which is usually located near page 30 of the data entry form. (*NOTE: the data entry upload field "ReposFile," if an image is already attached, the current file will be listed, followed by its file size and a link to remove that image.*)
5. Click **Remove** to remove the image. *Do this FIRST before making other edits or uploading a new image.*
6. Navigate back to the **Image Upload** page.
7. Click **Choose File** to find the image that you want to attach to this record.
8. Click on "Submit Record" to upload the new image, as well as any additional changes you made to the record's data.

NOTE: You can check that the correct image is showing on the website by going to the live website and viewing full display page of the record. To check for the correct image, paste the image's unique ID number after the equals sign in the "fulldisplay.php" URL. e.g. <http://www.quiltindex.org/fulldisplay.php?pbd=4-15-54>.

7. Using Default Information or “Presets”

It is possible for certain fields in a new record to be automatically filled with certain values. For instance, most of the quilts documented by your project will have several fields with exactly the same information (metadata) such as organization, copyright, etc. Records can be created with preset values for these repeated, identical fields. When you use a preset, the fixed information will automatically appear in the new entry form.

To create a preset,

1. Click **Ingest Record**.
2. Select or enter ONLY the information that you want to be filled in automatically. *If you have a group of quilts by the same quiltmaker, for example, you can create a preset for that quiltmaker and fill in all the fields about her (or him) that would be the same, plus all the information about your documentation project that would be the same.*
3. Enter only the data for the controls that you want to use in the preset.
4. Click **Submit Data**.
5. Find the record you just created (*see page 7 on finding existing records*).
6. Select the KORA identification number, or KID#, to view the full record.
7. Save the record as a preset. At the bottom of the full record view is an area “Save this record as a preset”. Next to “Name:” enter a name that describes your preset such as *“Maine Basic”* or *“Velma Williams”*, then click “Create”.

To enter a new quilt record using a preset,

1. Log in to KORA.
2. Select the project.
3. Choose the Scheme you'd like to ingest into on the "Scheme Selection" page.
4. Click **Ingest Record**, located in the left-column below the "Record" header.
5. If you have created any preset records, they will appear in the dropdown menu at the top of the first page of data entry next to “Load Values from Preset”. Select the preset you'd like to load information from.
6. Click **Load**. *The controls will now be populated with the preset you've select.*
7. Proceed to ingest the rest of the necessary data.
8. Click **Submit Data** to insert the record into KORA.

To edit preset information,

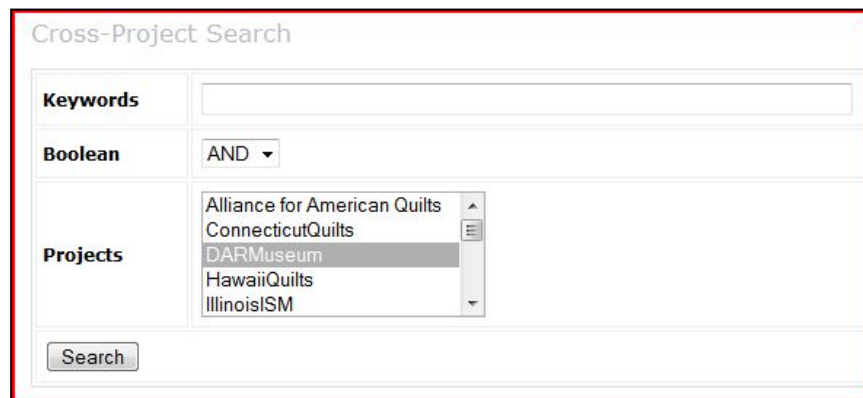
1. Click the **Manage Record Presets** link in the left-hand column below the "Scheme" header.
2. Click the "X" next to the preset, under the "Delete" header to delete the preset, or click the "X" next to the preset, under the "Demote" header if you want the record to no longer be a preset. *(NOTE: The record will still remain in the preset list but will not appear in search results, etc. To truly remove the record, please select "X" next to the preset, under the "Delete" header.)*

If you need to edit a preset, first demote it, then make the changes to the various fields, and finally resave the record as a preset.

To search across multiple projects,

KORA now allows users to search records across other projects for the purpose of creating certain kinds of new presentations (e.g. galleries, essays, or lesson plans that include quilts from more than one project). This option will not be available for most projects at present. To search across multiple projects,

1. Click **Cross-Project Search**.
2. Enter your keyword(s) in the search box. *See Figure 6*
3. Select the projects that you wish to search across.
4. Use Boolean operators to further refine your search.



The screenshot shows a web interface titled "Cross-Project Search". It features a search form with the following elements:

- Keywords:** A text input field.
- Boolean:** A dropdown menu currently set to "AND".
- Projects:** A list of project names: "Alliance for American Quilts", "ConnecticutQuilts", "DARMuseum", "HawaiiQuilts", and "IllinoisISM". The "DARMuseum" entry is highlighted.
- Search:** A button at the bottom left of the form.

8. Glossary

contributor (n):

Organizations that hold quilt collections or quilt documentation surveys. Potential contributors apply to the Quilt Index, and if accepted, either hand-enter their quilt records into KORA or work with the Quilt Index staff to ingest a pre-existing computer database into the Index. Each contributor's records reflect the information gathered and maintained by their organization. For a list of current contributors, see <http://www.quiltindex.org/contributors.php>.

comprehensive_fields (n):

Document that contains an inclusive set of descriptive fields that contain necessary information and controlled vocabularies specific to quilt research and study. These terms were developed initially by Michigan State University Museum using quilt documentation forms from pilot sites as well as broader input from many other quilt documentation projects throughout the world. The Comprehensive Fields are formulated as a metadata schema and delivered through the information architecture of MSU's KORA Repository.

core fields (n):

Those fields that were most used by contributors. In the previous version of KORA, these fields were highlighted in green. We are not differentiating the core fields from the rest of the fields in the new version of KORA.

ephemera (n):

Materials association with quilts and quiltmakers. Ephemera is manufactured or created for a specific, limited use, and often intended to be discarded thereafter.

field (n):

An individual item within the comprehensive fields. For example, the first field is InstNameF003, 'Contributing Institution Name'.

field code (n):

In 'Ingest Record' mode in KORA, each field has three basic components. One is the field code, for example "InstNameF003." It appears on the left-hand side of the interface in bold type.

ingest (v):

Contributors have password-protected web pages to access their own records, which they use to enter (ingest), edit and verify data and to upload images.

kid# (n):

The kid# is the unique "KORA identifier" number. Each record has its own kid#. The KORA identifier, or KID, is always listed at the top of the record and has letters and numbers, in three groups separated by two hyphens, *for example* "1A-AA-2B".

KORA (n):

The Quilt Index operates through MATRIX's digital library repository, called KORA (<http://www.matrix.msu.edu>). This digital library management system is, in essence, a very large database. KORA works best with the Firefox browser, for both PC and Mac users. You can download Firefox at: <http://www.mozilla.com/en-US/firefox/>.

preset (n):

Records can be created with preset values for repeated, identical fields such as organization, copyright, etc. You may create preset records for specific fields, or specific subsets of quilts and then use that "preset" and the preset information will automatically appear at first in the new entry form. Thus the data entry people do not need to type that information every time.

resave (v):

rename (v):

scheme (n):

Entry forms for entering and managing data records. The "comprehensive_fields" scheme is for quilt records. There is also a "galleries" scheme for entering contributor records, galleries, lesson plans, or essays, as well as an "ephemera" scheme for entering quilt-related ephemera objects.

upload (v):

To add an image to a record without an image. You can also remove uploaded images and add new ones. This process is very similar to attaching an image or document to an email message.