

## 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 and to upload images. 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/>.

The Quilt Index system in KORA has entry forms (called "schemes") for entering and managing quilt data records. This training document contains the following sections:

1. Create and activate a new account (p. 1)
2. Create ("ingest") a new quilt record (p. 2)
3. Tips for data entry (p.4)
4. Find and editing existing records (p. 6)
5. Uploading or replacing images in existing records (p. 7)
6. Using default information or "presets" (p. 7)

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

### 1. Create and activate a new account

Each person from your organization who will be editing or managing records will need to go to the repository page and 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.

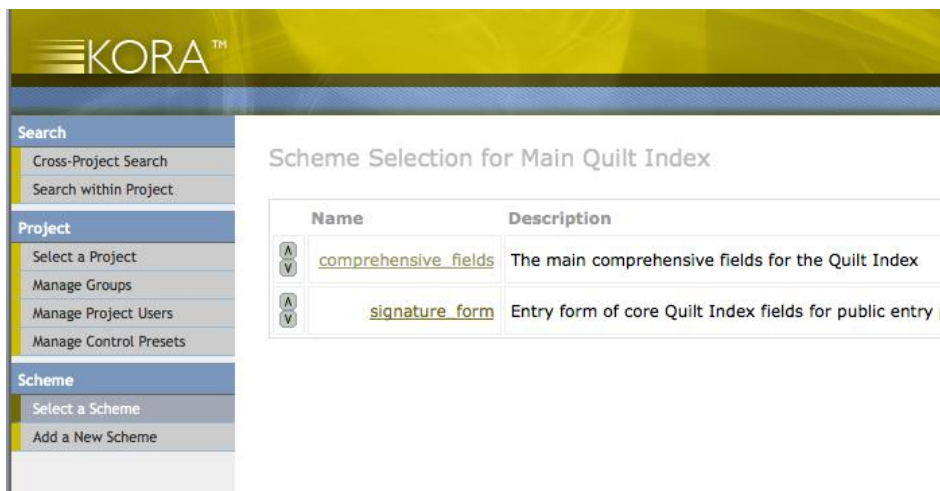
1. Go to the repository: <http://quiltindex.kora.matrix.msu.edu/login.php>.
2. Click on "New Account."
3. Enter a user name (we recommend using your name for this e.g. "justine.richardson"), choose a password, (be sure to write it down somewhere that you'll remember!), and enter the email address you will use to manage this account. Your full name, organization, and language are optional. Click "Create."
4. The page should say: "Your account has been created. Please check your e-mail for instructions on how to Activate Your Account."
5. You should promptly (with a few minutes) receive an email from "KORA Activation" with the subject line "KORA Account Activation". Check in your junk or spam mailbox if you do not receive an email with 10 minutes.
6. Follow the instructions and link in the KORA Account Activation email to activate your account. NOTE: This account activation email and link is time sensitive. You must look at this email and activate your account within 24 hours, or you'll have to create a new account.)
7. Email QI project staff with your activated user name and we will assign you to the correct project.

After you have created your account, you **MUST** email 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 on the "Project selection" page, you get the message "You are currently not a member of any active projects." that means we have not yet added your documentation project to your new user account.

## 2. Create ("ingest") a new quilt record

1. Go to: <http://quiltindex.kora.matrix.msu.edu/login.php> and log in.
2. Click on your project name. If you have the message "You are currently not a member of any active projects.", email QI staff with your username.
3. Click on the scheme name, which will either be your project name (for the earliest contributors) or *comprehensive\_fields* (see image below).



4. Clicking on the "comprehensive\_fields" scheme, will take you to the "Scheme Layout for comprehensive\_fields" page. This page displays a table of all of the metadata fields for the *comprehensive fields* scheme.

After you select the *comprehensive fields* scheme, an additional menu will appear below the main menu in the left navigation (see below). This menu has 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.

The screenshot shows a vertical navigation menu with four main sections: Search, Project, Scheme, and Record. Red lines connect callout boxes to specific menu items:

- Search** section:
  - Callout: "Search to find an existing record." points to "Search within Project".
- Scheme** section:
  - Callout: "View main fields/scheme set up." points to "Scheme Layout".
- Record** section:
  - Callout: "Enter a new record in a blank form." points to "Ingest Record".
  - Callout: "List all records in this project and scheme." points to "List Scheme Records".

### To Enter a New Quilt Record from a Blank Data Entry Form (Ingest Objects):

#### Entering Information: About the Quilt Index Comprehensive Fields

The data entry form for the Quilt Index quilt records is organized in pages 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. 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 Enter a New Quilt Record:

1. Click on "Ingest Record."

Input information into the fields.  
2. In 'Ingest Record' mode, each field has three basic components. To the left in bold type in the field code, for example "InstNameF003." To the right is the actual place for entering data, either a list or a text box. Below that is a helpful definition of the field, such as "Contributing institution name."



3. You will also notice that there are several different kinds of fields within the scheme. Most are intended for text; these can either be regular text fields, or multitext boxes, such as those for *Creator(s)* or *Editor(s)*. For personal names, the format of “Lastname, Firstname” must be followed, and each entry must be added individually. See “Tips for Data Entry” below, for information about different types of fields for entry.

4. It is necessary to “Submit” the finished record data on the last page of the data entry form (see right). The information you have entered is not saved until you insert the record by clicking the “Submit Data” button.

**Note:** The initial object ingestion ensures that your record is saved in the repository. Once the record is ingested, you can find this record and 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.

5. 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 in incorrect format, you will get a message about which field needs to be changed. Go correct that field and click "Submit Data" again.

### Tips for Data Entry:

**\*\*Important:** Be careful not to hit your "return" or "enter" key while you are entering data. In some computers and browsers, this can jump you out of "ingest record" mode.

In some lists, only one option can be selected. The options in single selection fields are displayed within a **drop-down menu**. To make a selection, simply select from the menu.

Some lists allow you to make multiple selections. The options in multiple selection fields are displayed within a **clickable menu**. The choices for multiple selection fields are selected by clicking on all applicable choices. In the examples to the right, KnotsF051b is a single-selection list, while DesignF052a is a multiple-selection list.

Fields with textboxes allow you an open entry form to enter text.

When entering a date, the preferred method is month-date-year: mm-dd-yyyy or c. yyyy.

Names should be entered as “lastname, firstname.”

Multi-Text (or Multi-name) fields allow multiple entries by entering in entry field and clicking “add.” Entered options are shown above the entry field. You must click “add” to ensure that information is recorded. 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. An example multi-name field is shown on the following page.

The screenshot shows a web form interface. On the left, the text 'QuiltTopF054' is displayed. To its right is a vertical stack of controls: a text input field containing 'Schafer, Mary', two buttons labeled 'Up' and 'Down', an empty text input field, two buttons labeled 'Add' and 'Remove', and a label 'Quilt top made by:' followed by another empty text input field.

If a field asks for a measurement, please specify unit of measure, for example, “inches.” The unit of measure can be preset.

Recommended citation format for field 67a (ExhibitListFO67a): 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, ex. ...Exhibit location 1, Dates 1; Exhibit location 2, Dates 2; etc.

Recommended citation format for field 71a (ContestList071a): “Contest Name,” Contest sponsor (if applicable), Contest Location, City, State/Province, Country, Dates of Contest.

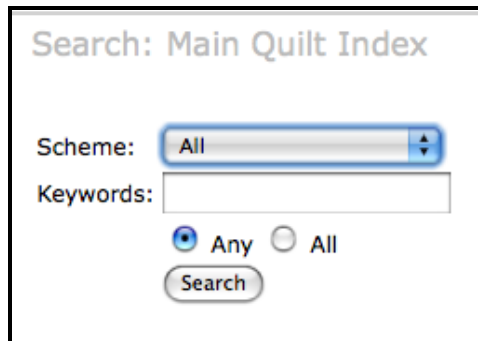
Information about publications related to the quilt can be entered in Field 88a (Other related items related to quilt)

### 3. Finding and Editing Existing Records

#### Search within Project:

With Search within Project you can search for records in your project using a general keyword search in any or all of your schemes.

1. Click on "Search within Project."
2. The search screen looks like this:
3. Write the search term in the box next to "Keywords:"
4. Select the scheme you wish to search within, or use "All" (default.)
5. Click on the "Search" button.
6. A list of records matching your search terms will be returned. The short versions of the records are displayed on the search results page.
7. You can view the full record (all the metadata fields) for any object by clicking on the object's KORA identifier. The identifier is listed at the top of the record. It is greenish-brown and underlined, like this: [4-15-2](#).



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.

**Advanced Search within Scheme:** The default fields set to allow "advanced search within scheme" are: The inventory and alternate inventory numbers, quilt title, quilt top maker, location made and county (InstInvContrNumF004, InstInvContrNumF004a, QuiltTitleF009, OwnerNameF010, QuiltTopF054, LocMadeF057a, ProvCountyF057b). If you had previously set other controls for advanced searching, they should still be available to you. If there are other fields that are useful for searching in your project, they can be set to 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.

#### List Scheme Records:

This function lists all the objects or records that have been entered within a 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.

**Sorting your results:** Currently, it is not possible to sort results in the new KORA system. That feature will be added to the search in project and advanced search features.

#### Editing an Existing Record:

Follow these steps to update or edit existing metadata 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 (The identifier is listed at the top of the record. It is greenish-brown and underlined, like this: [4-15-2](#)).
3. Click "Edit this Record" from the area 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. You MUST click the "Submit Data" button, located at the bottom of each page of data entry in order to enter the changes that you make to the record.
7. If the edit will be brought to the full-display page for the updated record. You will see all of the metadata for the object on this page. Scan these fields to verify that the updated data was saved in the appropriate fields.

#### 4. Uploading or changing 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 email message.

- Search and find the record you need to update/edit.
- Click on the identifier link for the object requiring edits/updates (The identifier is listed at the top of the record. It is greenish-brown and underlined, like this: [4-15-2](#)).
- Click "Edit this Record" from the area above the record.
- Go to the "Submit Data" page (usually click on jump to page "30")
- Under "ReposFile", click "Choose File" to find the image you want to upload.
- Optional: Then, 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 filesize 4MB, 1424 px wide).

To replace an existing image, follow these steps:

- Search and find the record you need to update/edit.
- Click on the identifier link for the object requiring edits/updates (The identifier is listed at the top of the record. It is greenish-brown and underlined, like this: [4-15-2](#)).
- Click "Edit this Record" from the area above the record.
- Go to the "Submit Data" page (usually click on jump to page "30")
- Under "ReposFile", if an image is already attached, the Current File will be listed, followed by its filesize and a link to "Remove" that image.
- First REMOVE the attached image by clicking "Remove" (when replacing images and also editing other information in the record, FIRST remove the image, then make other edits and upload the new image.
- Then navigate back to the Submit Data page and click "Choose File" to find the image that you want to attach to this record.
- Click to the last page of the data entry form to upload the new image, as well as any additional changes you made to the record's data.
- You can check that the correct image is showing on the website by going to the "Full Display" of the record, pasting that unique ID number after the equals sign in the "fulldisplaynew.php" url: For example: <http://www.quiltindex.org/fulldisplay.php?pbid=4-15-54>

#### 5. Entering New Records Using Default Information or "Pre-sets":

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. 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.

##### Creating a Preset:

To create a preset, start with a basic entry form by clicking on "Ingest Record". 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.

1. Enter only the data to the controls that you want to use in the preset.
2. Click the "Submit Data" button.
3. **Find** the record you just created (see p. 5 on finding existing records).
4. Select the KID# to view the full record.
5. At the bottom of the full record view is a spot to save a record as a preset and name it (such as "Maine Basic" or "Velma Williams").

#### **To Enter a New Quilt Record Using a Pre-set:**

1. After logging into KORA and selecting the project, choose the scheme you'd like to ingest into on the "Scheme Selection" page.
2. Click the "Ingest Record" link in the left-column below the "Record" header.
3. Select the preset you'd like to load from in the dropdown next to the "Load Values from Preset" label.
4. Click the "Load" button.
5. The controls will now be populated with the preset you've select.
6. Proceed to ingest the rest of the necessary data.
7. Click "Submit Data" to insert the record into KORA.

#### **Editing Preset Information:**

1. Click the "Manage Record Presets" link in the left-hand column below the "Scheme" header.
2. You can click the "X" next to the preset, under the "Delete" header if you want to delete the preset.
3. You can click the "X" next to the preset, under the "Demote" header if you want the record to no longer be a preset.
  - a. The record will still remain in the preset list but will now appear in search results, etc.
  - b. To truly remove the record, please select "X" next to the preset, under the "Delete" header.
  - c. If you need to edit a preset, demote it, make the changes to the various fields, and then resave the record as a preset.
4. You can also rename a preset by selecting the old name and typing in the new name of the preset.

#### **Cross-Project Search:**

KORA now allows users to search records across other projects for the purpose of creating certain kinds of new presentations (such as galleries, essays, or lesson plans that include quilts from more than one project). This option will not be available for most projects at present. Click "Cross-Project Search." Enter your keyword(s) in the search box, and select the projects that you wish to search across. A Boolean and/or operator allows you to further refine your search. The Cross-Project Search Form is pictured on the following page.

Cross-Project Search

<b>Keywords</b>	<input type="text"/>
<b>Boolean</b>	AND ▾
<b>Projects</b>	<ul style="list-style-type: none"><li>Alliance for American Quilts</li><li>ConnecticutQuilts</li><li><b>DAR Museum</b></li><li>HawaiiQuilts</li><li>IllinoisISM</li></ul>
<input type="button" value="Search"/>	

Feel free to contact Quilt Index staff Mary Worrall ([Worrall@msu.edu](mailto:Worrall@msu.edu)) and Justine Richardson ([justine.richardson@matrix.msu.edu](mailto:justine.richardson@matrix.msu.edu)) with questions as you work with your records. Please copy your email to both these email addresses for promptest response time.