Introduction to Scalar Basics

Taught by: Claire Tratnyek and Tieanna Graphenreed

HIST 5237: Issues and Methods of Pubic History

Prof. Angel David Nieves

Fall 2021

Northeastern University
NULab for Texts, Maps, and Networks

Feel free to ask questions at any point during the presentation!

Workshop Agenda

- Understand key **functionalities** of Scalar as a digital humanities platform and as a platform for digital public history
- Learn how to set up a Scalar account
- Start thinking about how to use Scalar with your classmates for your course project
- Learn how to add **pages** and **media** to a Scalar book project, and think about how to link these pages and media through paths, tags, comments, annotations, and more.

Slides, handouts, and data available at **https://bit.ly/diti-fall2021-nieves-scalar**

Northeastern University
NULab for Texts, Maps, and Networks

Feel free to ask questions at any point during the presentation!

What is Scalar?

Feel free to ask questions at any point during the presentation!

What is Scalar?

Scalar is a digital humanities/digital public history publishing platform that was developed by the Alliance for Networking Visual Culture at the University of Southern California. The [platform's creators](#) intended it to be "a model for media-rich digital publication."

Northeastern University
NULab for Texts, Maps, and Networks

Scalar Vocabulary

- **Pages:** basic element for building all content (text, embedded media, visualizations, etc.) in a Scalar project. Visual and HTML editors available.
- **Paths**: linked pages that order how readers navigate through a Scalar book.
- **Notes:** content which is linked to a portion of the text of a page (think footnotes in a physical book). Notes can be hyperlinked or embedded in a page.
- **Annotations:** content linked to a specific portion of a media file that is used to describe that imported media. You must turn an entire page into an annotation.

Northeastern University
NULab for Texts, Maps, and Networks

Nonlinear Storytelling in Scalar

- The most distinctive quality of Scalar is that it allows you to create a **nonlinear narrative**, instead of a linear one that people might read from front to back.
- Scalar's nonlinear narratives can be thought of as <u>networks</u> that are composed of **pages, paths, notes, comments,** and **annotations.** We'll cover all these later!
- As a creator, you will need to think critically about how these relationships are shaped by **your content**, **your goals** for the project, and the **possibilities and limitations of the platform**.

Feel free to ask questions at any point during the presentation!

What is a Non-Linear Narrative?

- What is an example (from real life or any grad school readings you've done so far) of a ***nonlinear narrative***?
- What are some **pros** and **cons** of using nonlinear narratives in, for example, a public history project?
- How can ***both linear and nonlinear elements*** work together to help tell a story? Can you think of an example to share?

Northeastern University
NULab for Texts, Maps, and Networks
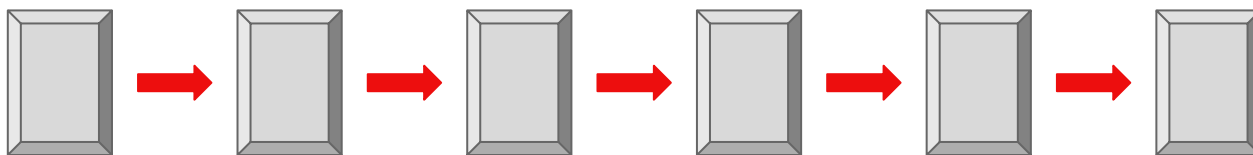
Understanding Scalar "books"

- Scalar projects are called **"books."**
  - How might thinking of your project as a "book" affect how your narrative takes shape?
  - **Scalar's nonlinearity allows you to set the information arc for the reader**. You can make design/organization decisions according to what information would most benefit readers at specific times.
- Just like the table of contents and chapters of a physical book, **the organization of a Scalar book helps determine how the reader receives and interprets content**. Working with Scalar puts these editorial decisions at the center of your projects!

Northeastern University
NULab for Texts, Maps, and Networks

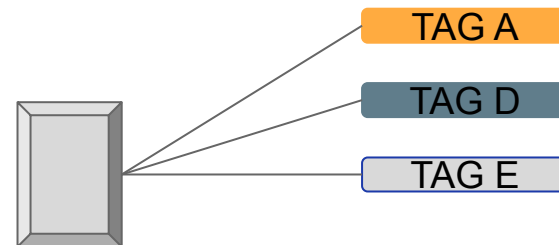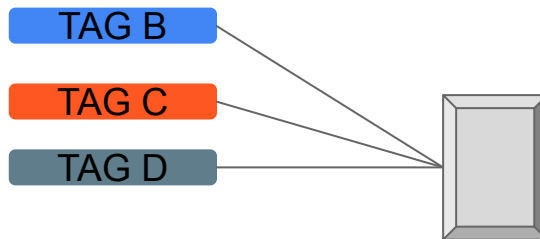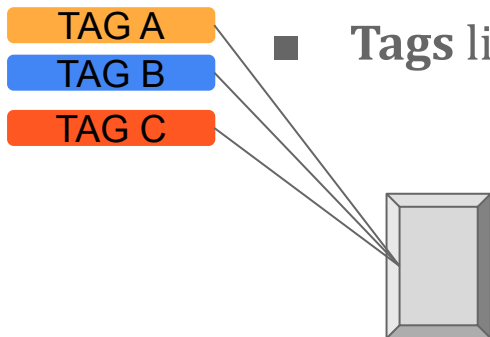*Feel free to ask questions at any point during the presentation!*

Scalar Whole-whole Relationships

- **Whole-whole relationships** connect pages in their entirety.
  - **Paths** link pages according to a specific linear order
  - **Tags** link pages by a common theme

TAG A
TAG B
TAG C

TAG B
TAG C
TAG D

TAG A
TAG D
TAG E

Feel free to ask questions at any point during the presentation!

Scalar Uses Paths to Create Cohesive Narratives

- **Paths** are the sequences that guide your reader through the Scalar book. They allow you to add **linear** elements to your otherwise **nonlinear** narrative.
- Once you have more than one page, you can create a path.
- Confusingly, Scalar refers to the homepage of a path as being "the path" itself. The other pages in the sequence are considered to be "contained by the path."
- "Paths can intersect (i.e. they may share pages) and they can contain any kind of Scalar content, even other paths, enabling you to create hierarchical structures." (Scalar 2 User's Guide)

Northeastern University
NULab for Texts, Maps, and Networks

Feel free to ask questions at any point during the presentation!

Scalar uses Tags to Group Content in Multiple Ways

Tags group content by identifying commonalities amongst heterogeneous items.

- In Scalar, tags are more than just additional content descriptors, they're their own full-fledged pieces of content.

- "Readers who arrive at [a] tag will see its own content (either text or media) first, and then below that, a list of the items it tags. Content items which have been tagged display their **tag relationships** at the bottom of the page." ([Scalar 2 User's Guide](#))

This media is tagged by:

1870s | OSU People

OREGON STATE PHOTO TIMELINE (2/15)

1870s

This page is tagged by:

Oregon State Photo Timeline

This page is a tag of:

- Class of 1872
- Finley home in Corvallis, ca. 1870
- Portrait of George F. Burkhart, ca. 1871
- Portrait of James K.P. Currin, ca. 1870
- Portrait of Sarah Latimer Finley, ca. 1874
- Portrait of Sarah Latimer Finley, ca. 1874

Northeastern University
NULab for Texts, Maps, and Networks

Feel free to ask questions at any point during the presentation!

Scalar Whole-Part Relationships

Whole-part relationships connect an entire page to a *part* of another page.

- These relationships are particularly useful for adding additional context.
- Examples of whole-part relationships:
  - **Hyperlinked media**
  - **Notes**
  - **Annotations**

Check out the page on Whole-Part relationships in the Scalar 2 User's Guide for examples

Feel free to ask questions at any point during the presentation!

PAUSE for Questions and Comments

Northeastern University
NULab for Texts, Maps, and Networks

Feel free to ask questions at any point during the presentation!

What more can you do with Scalar?

Feel free to ask questions at any point during the presentation!

Scalar is a multi-functional tool

As we discussed, Scalar allows you to **author** your own publications. Additionally, you can use Scalar to:

- **Assemble** different types of media from multiple sources in one place
- Work alongside **multiple authors**
- **Annotate** documents and other media files
- **Visualize data** and other relationships

Finally, Scalar prides itself on itself on its versatility, especially for design. You can **import images**, **embed Google Maps**, and **add CSS**, and other visualization interfaces to further customize the appearance of your Scalar book.

Northeastern University
NULab for Texts, Maps, and Networks

Feel free to ask questions at any point during the presentation!

Visualizations in Scalar

- Scalar has a **built-in visualization feature** that allows you to create visualizations of the different types of pages and relationships in your Scalar book.
  - **Force-directed**: Visualizes the web of relationships between pages
  - **Grid**: Represents in grid form how many pages are contained within each type of page relationship
  - "**Map**," "**Radial**," "**Media**," "**Tree**," and "**Word Cloud**" similarly visualize the relationships between pages.
- You can add these visualizations to pages in your Scalar book. Even if you do not include visualizations *in* your book, they can still be helpful to you as you compose your nonlinear narrative.

Northeastern University
NULab for Texts, Maps, and Networks

Some Visualization Options

Force-Directed

Tree

Northeastern University
NULab for Texts, Maps, and Networks

Feel free to ask questions at any point during the presentation!

Example: *Unpinning History*

An example of a public-facing Scalar project is ["Unpinning History: Japanese Posters in the Age of Commercialism, Imperialism, and Modernism,"](#) curated by Rika Hiro and students in the University of Southern California course AHIS 387: Later Japanese Art.

Some questions:
- How does this project's nonlinear storytelling make it different from reading a book or long article?
- At what points are the nonlinear storytelling elements most effective? Least effective?

Unpinning History: Japanese Posters in the Age of Commercialism, Imperialism, and Modernism

Begin with "Introduction"

Feel free to ask questions at any point during the presentation!

PAUSE for Discussion and Questions

Feel free to ask questions at any point during the presentation!

Working in Scalar

Feel free to ask questions at any point during the presentation!

Creating a Scalar Account

- The Scalar home page has an index of public Scalar books, and the option to **sign in** or **register**. Once you are registered and have an account, you will see the books that you're able to edit.

- Before you make an account, you need a **registration key,** which your professor will provide. You can also request a registration key at https://scalar.me/anvc/contact/

- Scalar requires that you use an email affiliated with an academic or cultural heritage institution.

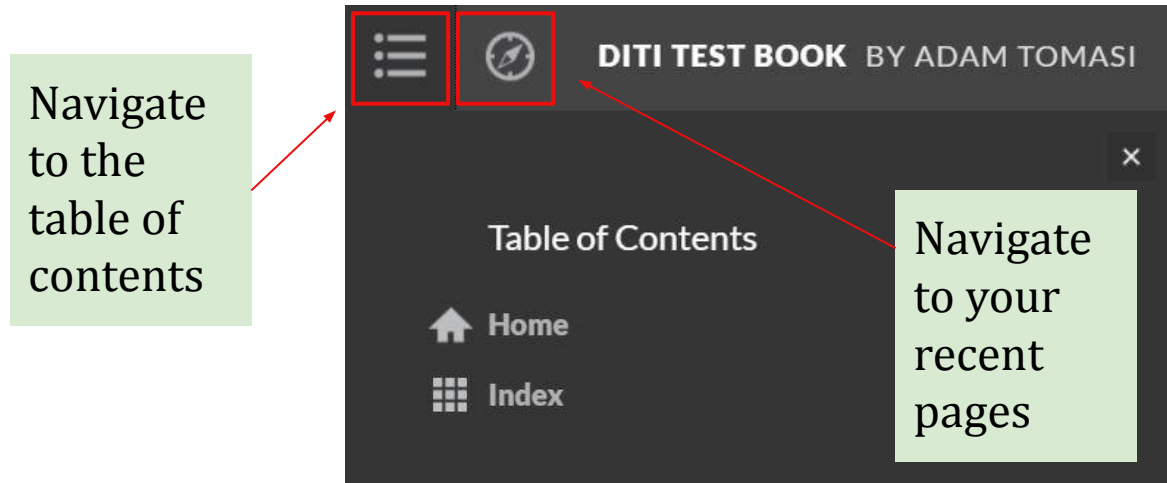*Feel free to ask questions at any point during the presentation!*

Anatomy of Scalar

- **Pages:** basic element for building all content (text, embedded media, visualizations, etc.) in a Scalar project. Visual and HTML editors available.
- **Paths**: linked pages that order how readers navigate through a Scalar book.
- **Notes:** content which is linked to a portion of the text of a page (think footnotes in a physical book). Notes can be hyperlinked or embedded in a page.
- **Annotations:** content linked to a specific portion of a media file that is used to describe that imported media. You must turn an entire page into an annotation.

Northeastern University
NULab for Texts, Maps, and Networks

Feel free to ask questions at any point during the presentation!

Navigating Scalar

The two icons at the top-left of every Scalar book will help you return to the table of contents as well as the pages you most recently visited.

Navigate to the table of contents

DITI TEST BOOK BY ADAM TOMASI

Table of Contents

Home

Index

Navigate to your recent pages

Northeastern University
NULab for Texts, Maps, and Networks

Feel free to ask questions at any point during the presentation!

Creating Pages

Scalar projects, much like standard websites, are composed of **pages.**

DITI TEST BOOK BY ADAM TOMASI

Add a title, description, and text, just as you would on a web page.

This page contains no content. Click the ✎ button above to add some.

Northeastern University
NULab for Texts, Maps, and Networks

Feel free to ask questions at any point during the presentation!

Uploading Media

- You can import media content (images, videos, audio clips) from **online collections** like SoundCloud and YouTube. You can also upload **local media files** saved to your computer.
- When you import a media item to Scalar, it automatically gets its own page.

Select the down-arrow button.

Feel free to ask questions at any point during the presentation!
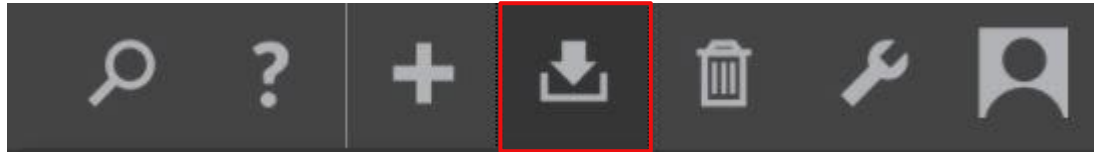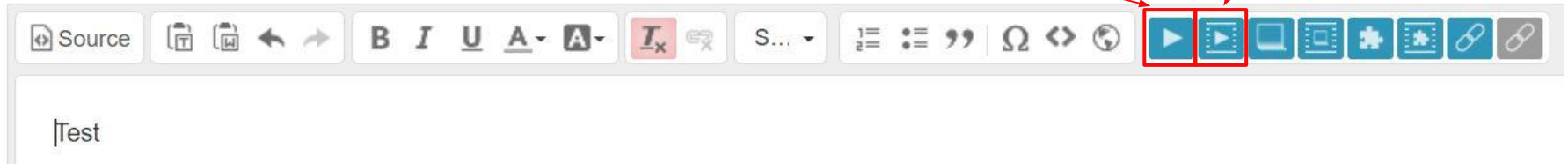
Adding Media to Pages

You can embed media on your Scalar page in one of two ways: by hyperlinking it to text on the same page, or by embedding it without a hyperlink.

Add media that is hyperlinked to text (create text first)

Embed media without a hyperlink

Test

Feel free to ask questions at any point during the presentation!

Adding Media to Pages

This is an example of media that is hyperlinked to page text. When clicked, the hyperlink repositions the page on the image.

became the foremost subject for early posters and small businesses that did not have sufficient budgets to commission specific designs for the marketing of their own products. [8] That being said, large corporations, especially steamship companies and department stores, tended to commission posters with complicated designs and many colors, which thus required more color plates and labor, as seen in the case of the ⊙ Japan Mail Steamship Company.

Nippon Yusen Kaisha = Japan Mail Steamship Co. (Fushimi-maru)
Source: USC Digital Library

hyperlinked text

hyperlinked image

Feel free to ask questions at any point during the presentation!

Paths vs. Tags (& Annotations & Notes)

Let's Discuss:

In what cases would you choose to: create a **path**, create a **tag**, create an **annotation**, create a **note**?

Focus on what benefits each has and in what scenarios they would best fit.

Feel free to ask questions at any point during the presentation!

Creating Paths

To make a path, navigate to the page you want as your homepage ("the path") and scroll to the options menu at the bottom of the Scalar page editor.

Under "Relationships," select "Path." This will make the page the homepage for the path. You will then choose the pages you want to be "contained by the path."

Feel free to ask questions at any point during the presentation!
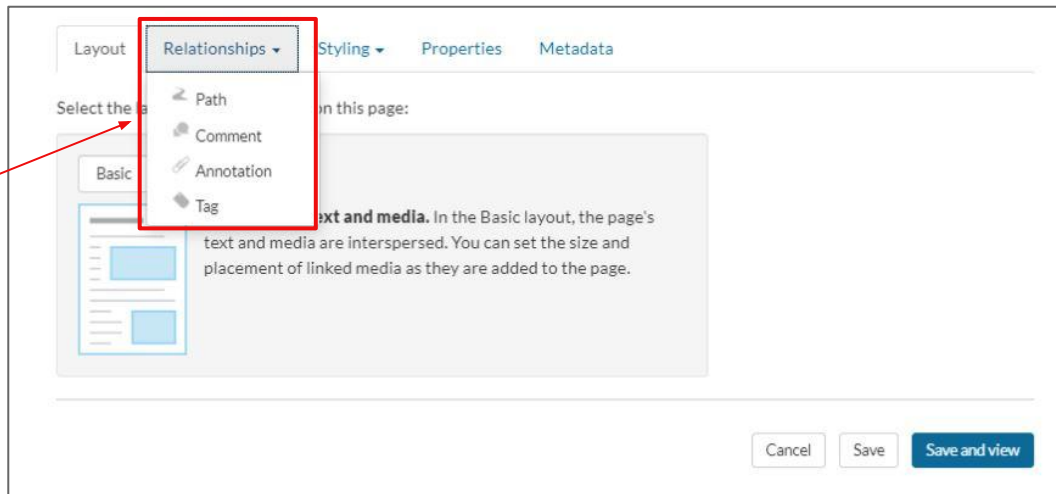
Creating Tags

- **Tags** categorize your pages and media according to commonalities between them, which allows the reader to jump between the items sharing a tag.
- Tags are created in the same way as paths are, except you will select "Tags" instead of "Paths" in the "Relationships" menu.

Select the page(s) that you want this page to tag, or the page(s) that you want to tag it.

| Layout | Relationships **1** ▾ | Styling ▾ | Properties | Metadata |

To make this page a tag, choose the items that it tags.

To tag this page, choose the items that tag it.

Feel free to ask questions at any point during the presentation!

Creating Annotations

- **Annotations** are whole-part relationships because they are pages that specifically describe imported **media items** (which all have their own pages).
- To create an annotation, you must navigate to the page you want to *become* the annotation. Just like when you create paths and tags, scroll to the bottom of the page editor and select "Annotations" under the "Relationships" menu.

Select the media items you want this page to annotate.

| Layout | Relationships ➊ ▾ | Styling ▾ | Properties | Metadata |

This page is an annotation of:

Annotate additional media

Feel free to ask questions at any point during the presentation!

Creating Notes

- **Notes** are another type of whole-part relationship in Scalar. They are pages that describe *some* of the text in another page.
- Like media links, notes are created in the text box of the Scalar page editor. Also like media, you can either add notes to a page that are or are not hyperlinked to specific text on that page. Unlike media items, though, the embedded notes are not visible in their entirety.

Add notes that are hyperlinked to text

Add notes that are embedded in the text

Feel free to ask questions at any point during the presentation!

Any Remaining Questions?

Feel free to ask questions at any point during the presentation!

Thank you!

If you have any questions, contact DITI at nulab.info@gmail.com
Sign up for DITI office hours! https://calendly.com/diti-nu

Developed and Taught by

Claire Tratnyek
Digital Integration Teaching Initiative
DITI Research Fellow

Tieanna Graphenreed
Digital Integration Teaching Initiative
DITI Research Fellow

Adam Tomasi
Digital Integration Teaching Initiative
DITI Research Fellow

Talia Brenner
Digital Integration Teaching Initiative
NULab Co-coordinator (2020-Summer 2021)

Slides, handouts, and data available at **https://bit.ly/diti-fall2021-nieves-scalar**

Northeastern University
NULab for Texts, Maps, and Networks

Feel free to ask questions at any point during the presentation!