Schoenberg Database of Manuscripts Data Entry Manual
by John DiMattia, John Posch, and Lynn Ransom
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Recommended browser: Chrome or Mozilla

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Introduction to SDBM Entities:

The SDBM includes five entities that are essential to the organization of the database: *Entries, Manuscripts, Sources, Provenance Agents*, and *Names.*

*****These entities are a new feature of the SDBM. Many entries are not yet linked to their corresponding manuscripts. *****

Each individual entity has a unique ID number. This design allows for improved data quality and more nuanced searching and sorting within the database.

Users create ***Entries*** when they add information about a manuscript to the database from various types of sources. An entry corresponds to a single manuscript description from a single source. This could be a specific lot from a sale, an item described in a published institutional catalog or unpublished finding aid, an instance of personal observation regarding a single manuscript, etc.

Manuscript Record entities represent a physical manuscript. All of the entries that describe the same manuscript are linked together via a *Manuscript Record*. Each *Manuscript Record* has its own page containing links to entries that describe it as well as a composite provenance list.

Source entities represent the basis for the information recorded in ***Entries***. All of the entries that derive from the same source are linked together via the Source record. Each Source entity has its own page containing descriptive information and links to entries that derive from it. Sources are organized into six categories: auction/sale catalogues, collection catalogs, online-only auction or bookseller websites, personal observations, other published sources, or unpublished sources.

Provenance Agent entities are individuals or organizations that impact the history of a manuscript's possession and transmission. These include scriptoria, auction houses, dealers, collectors, university collections, etc. Each Provenance Agent record has its own page containing links to entries in which it appears.

Name entities include manuscript authors, scribes, and artists. Each Name record has its own page containing links to entries in which it appears.

How to Create a User Account:

1. Click **Login**, located at the top-right of the database homepage.
2. Click the **Sign Up** link at the bottom of the page.
3. Enter your information into the data fields.
4. Click **Sign Up** to create your account.

How to Edit Your User Profile:

Please provide some information about yourself to help other users get to know you. Other users will access your profile information by clicking on your username as it appears in entries, manuscript records, or comments with which you're associated.

1. You will automatically arrive at the *Edit Your Profile* page after you create your user account.
2. Click on your username anytime you are signed in to access the *Edit Your Profile* page.

How to Recover Your Password:

1. Click **Login**, located at the top-right of the database homepage.
2. Click **Forgot your password?**
3. Enter your email address and click **Send me reset password instructions** to receive an email containing further instructions.

User Dashboard Functions:

The dashboard is the central location for all user activities. To access it:

1. **Login** to your account by clicking the link in the navigation bar at the top of the page.
2. You will automatically arrive at the dashboard page.

From your dashboard, you can:

- Add a New Entry (see page 6-8)
- Manage Your Entries (see page 9)
- Manage Your Sources (see page 12)
- Manage Your Comments (see page 12)

How to Search the Database (ALL USERS):

You can begin searching from the homepage without logging in. However, if you search while logged in you have the ability to save your searches and bookmark specific entries. Users are encouraged to log in before searching in order to take full advantage of the SDBM's capabilities.

Basic Search:

The basic search feature is located in the navigation bar at the top of every page. This search will query all fields in the database.

1. Enter your search term into the search box. By default, the search runs in case-insensitive mode, which means that uppercase and lowercase characters in your search term get treated the same. For example, search term "sotheby's" returns the same results as search term "Sotheby's".
2. Click **Search** to search the database.

Advanced Search:

1. Click **Advanced Search** to the left of the *Search* button.
2. Enter your search terms in the search boxes. Search terms are grouped into text fields and numeric fields.
3. To search on all the columns/fields in the database, leave *All Fields* selected in the dropdown box next to the search box. To search on one specific column only, choose it from that dropdown box.
4. The *Match* dropdown box at the top of the search boxes allows you to specify how you want your search term to be matched. Select *All* to search the database for entries that include all of the search terms you enter. Select *Any* to search the database for entries that contain any of the search terms you enter.
5. By default, the search runs in case-insensitive mode, which means that uppercase and lowercase characters in your search term get treated the same. For example, search term "sotheby's" returns the same results as search term "Sotheby's". When you check the "Case Sensitive" checkbox, the search now distinguishes uppercase from lowercase and "sotheby's" no longer matches "Sotheby's" because the lower case "s" in your search term no longer matches the upper case "S" in the database.
6. Sort your search results by selecting an option from the **Sort by (term)** drop down menu at the bottom of the page.
7. Click **Search** to search the database according to the terms you entered.

Recent Additions:

1. Click **Recent Additions** to the left of the *Search* button. You will arrive at a search results page listing the most recent entries to the database.

Sorting and Refining Search Results:

1. Sort the search results by specific columns in ascending or descending order using the **Sort by (term)** dropdown box. Entries are by default given in descending order by manuscript ID.
2. By default 10 entries are listed per page. Change the number of results displayed by selecting 20, 50, or 100 in the **[#] per page** dropdown box.
3. Current search facets appear individually at the top of the search results page. Remove any facet by clicking the **X icon** next to its name.
4. Additional search facets appear in the left column of the search results page. Click on a facet to add it to the current search criteria. Facets are numerically sorted in descending order by number of instances. Click **more**>> at the bottom of each list to open a pop-up window. From this pop-up window, you can change the sorting method and view additional facets.
5. To enter your own additional facets, click **Advanced Search** at the top of the screen to open the Advance Search page, where you can type in additional search terms.

How to Create a Bookmark:

1. **Login** to your personal dashboard.
2. **Search** for entries.
3. Click the **Bookmark checkbox** at the top-right of an entry's description.
4. To view your bookmarks, click the **Bookmark** link in the **My Searches** menu in the top-horizontal navigation bar. You must be logged in to view your bookmarks.
5. You can export your bookmarks by clicking **Email** at the top of the page to email your bookmarks.
6. To view the SDBM ID numbers for your bookmarked entries, click **Cite**.
    a. **CAUTION: Entries** and **Manuscript Records** all have their own SDBM ID numbers. Entry ID numbers are displayed as: SDBM_XXXXXX. Manuscript Record ID numbers are displayed as: SDBM_MS_XXXXXX.

How to Save Your Searches:

1. **Login** to your personal dashboard.
2. **Search** for entries.
3. Click the **History** link, located in the **My Searches** menu in the top horizontal navigation.
4. Click the **save** button next to each search you wish to save.

5. To view your saved searches, click the **Saved Searches** link located in the **My Searches** in the top horizontal navigation.

<u>Quick Start Guide for Data Entry: (</u>for detailed instructions see pages 6-9)

1. **Login** to your personal dashboard.
2. Click **Add New Entry** under the *Data Entry Tasks* menu on your dashboard page.
3. Identify the Source for your data by either:
    a. Selecting a pre-existing source in the database
    b. Creating and describing a new source
4. After you identify your source, you will arrive at a form for creating a new entry, with your source information filled automatically.
5. Fill in as many of the data fields as you can, based on the information provided in your data source. Each data field has its own content standards. **Click on the field name** to open a pop-up window that describes the content standards for that field. You can also find these standards in the Data Dictionary.
6. Click **Save**. Your data is now saved and sent to administrators for approval.

<u>Quick Start Guide for Managing Your Entries:</u>(for detailed instructions for editing entries, see page 10)

1. **Login** to your personal dashboard
2. Click **Manage Yours Entries** under the *Data Entry Tasks* menu on your dashboard page.
3. You are now on the Admin Search page. **Search** for the entry you want to edit via the search options at the top of the page.
    a. If you know the ID number of the entry, you can quickly find it via the *Jump to ID* box, located to the right of the basic search options.
4. Once you find the entry, click **Edit** under the *Actions* options, located in the first column of the search results.

<u>Fundamentals for Data Entry:</u>

- Always consult the content standards for each field before you enter data. These can be found in the Data Dictionary or simply by clicking on the field label to see a pop-up window with the field definition.
- Record data entered into *As Recorded* fields EXACTLY as given in the data source, including spelling errors, word order, incorrect information, etc. The

purpose of these fields is to preserve the data of the source material, because the source material is historical evidence in its own right.

- If in doubt, email the database administrators for help.

How to Enter New Data:

1. Login to your account from the Homepage by clicking **Login** at the top-right of the screen.
2. Click **Dashboard** to open your personal dashboard page.
3. Click the **Add New Entry** link under the *Data Entry Tasks* box, located within the left navigation pane.
4. The *Add an Entry – Identify the Source* page will appear. Identify the data source for the entry or entries you intend to enter. Enter information about your source into the fields (*Source Date, Selling Agent or Institution/Collection, and Source Title*). Existing sources in the database that match your source will appear at the bottom of the page.
   a. If you see your source listed in the search results, **click on it**. You will arrive at the *Add an Entry* screen with the source information automatically populated into your new entry. Skip ahead to Step 5 for further instructions on creating a new entry.
   b. If your source does not appear in the search results once you've exhausted all possible search terms, your source does not exist in the database yet. Click **Create A New Source** to add the source to the database.
      i. On the *Create a New Source* page, **select your source type** from the drop-down menu. Definitions for each source type are shown on this page. You can also refer to the Data Dictionary for full source type descriptions. Once you select a source type, additional data fields will appear on the screen.
      ii. **Enter data** about your source into the available fields. Click on a data element name for a definition, or refer to the Data Dictionary for full element descriptions.
      iii. Click **Save** to save your source. After saving a pop-up window will appear with several options about how to proceed.
      iv. Or, if you decide not to enter your source, click **Cancel** to return to the *Add an Entry – Identify the Source* page. All information typed into the *Create a New Source* page will be lost.
5. Once you select a source or create a new one, you will be directed to the *Add an Entry – Fill Out Details* page. Details about your data source will automatically be included with your entry.

6. Fill in as many of the data fields as possible, given the information provided in your source. Click on a data element name for a quick definition, or refer to the Data Dictionary for full element descriptions.
7. If there are any problems with your data formats, a pop up box will appear and let you know. You must alter your data in accordance with pop up box suggestions and click "Save" again before your manuscript data will be saved. Click on the data field name to reveal the content standards for that field.
8. Click **Save** to add your entry to the database. A new entry will not be publicly visible until an administrator has approved it.
    a. Once you save your entry, several options will automatically appear regarding your next action. You can:
        i. Click **Yes** to add another entry for the source
        ii. Click one of the following options to not add other entries for this source:
            1. Click **Not right now. I'll enter the rest later** if the source contains additional entries, but you do not wish to add them at this time
            2. Click **No, there are no more entries to enter from this source** if all entries from this source have been entered in the database.
            3. Click **No, but let me find or create a manuscript for this entry** to link your entry to other entries about the same manuscript.
            4. Click **Return to editing this entry** to return to the *Add an Entry – Fill Out Details* for the entry you just saved.
9. Or, if you decide not to save your entry, click **Cancel** to return to your dashboard*.* All information typed into the *Add an Entry – Fill Out Details* page will be lost.

Standardized Data Value Entry

Lookup tables govern certain fields. The purpose of the lookup table is to maintain consistency in spelling and naming conventions. The lookup tables contain values that are used as a data entry guide. Common misspellings are avoided because these tables will suggest existing values in a dropdown box of suggestions that shows up when you begin typing. There are lookup tables for the following fields: *Artist, Author, Buyer, Holder, Language, Place, Scribe, Seller,* and *Selling Agent*. These tables contain a collection of values that grow automatically through the process of adding/editing manuscripts.

When adding new data into a field governed by a lookup table, start by typing in the first letters of the value. The lookup table will generate a list of possibilities for you to choose from. If you do not see a suggestion, try typing other possible values, such as variant spellings or different word order for multi-word values.

For example, if a catalog gives the follower of Jean Bourdichon as an artist, you would type in "Jean", and a list of several names beginning with Jean will appear below. Click on the appropriate name, in this case "Jean Bourdichon, follower", and it will automatically be entered.

If no value for your data appears in the lookup table, create a standard value by clicking the **>>Create …** option, which appears automatically as the first suggestion in the lookup table.

<u>How to Create a Standard Data Value</u>

- Click **>>Create…**, the first option suggested in the lookup table. A pop-up window will appear.
- Enter a new standard value in the **Name** field. Follow the instructions provided in the Data Dictionary for content standards.
- Fields that include personal names have additional options:
    - Click **Find suggestions** to search VIAF for possible standard names.
        - In the search results, click on the VIAF ID number to go to the name's VIAF authority page.
        - Click **Use this info** to auto-fill the name's information into the data fields.
    - Enter any additional information you can provide about the standard value in the **Comments** field.
- Click **Create** to save the new standard value in the database.

Please search all possible ways of spelling or entering names in the lookup tables, especially if you are entering a name, location, or language that should already be in the database. This step is crucial to maintaining clean data.

<u>Expressing Data Ambiguity</u>

The fields governed by standardized data values also include options for expressing ambiguity in the data. To the right of the field, a button displaying a checkmark automatically appears. By clicking on the button, you can change the icon it displays to reflect three different circumstances:

- Checkmark = the source contains the information
- Question mark = the source expresses doubt about the information
- Asterisk = you (the data entry person) are providing the information, based on a strong inference. You can further explain your reasoning in the *Other Information* field, if you desire.

Editing Entries in the SDBM

Sources that describe manuscripts—auction and sale catalogs, institutional catalogs, websites, etc.—are historical evidence in their own right. The SDBM seeks to preserve the integrity of its data sources. When entering data, users should record the information as given in a data source, even if they believe some of the information is incorrect. If a user believes a data source provides incorrect information, they should describe their reasoning in the *Other Information* field for that entry.

If you come across an entry that you think contains incorrect information, DO NOT CHANGE THE DATA, unless you can consult the source for that entry and confirm that the error resulted during transcription.

What to Do When You Find a Data Error in the SDBM:

If you notice an error in the SDBM, add a comment describing the error on that page. Commenting allows you to participate in the ongoing effort of describing and studying manuscripts by creating a dialogue about the data in the SDBM.

You can also email the SDBM administrators anytime you have questions or concerns about the database at: sdbm@pobox.upenn.edu.

Remember that the SDBM reproduces the data exactly as it is given in the **Source** material. The SDBM does not make any objective statements about the reality of the manuscripts. Descriptions of manuscripts change over time, just as scholarship changes. By preserving these inconsistencies, the SDBM reflects the changing nature of manuscript studies across time.

How to Manage an Existing Entry:

1. **Login** to your personal dashboard.
2. Click **Manage Your Entries** under the *Data Entry Tasks* options.
3. You are now at the Entry Manager.
4. **Search** for the entry you want to edit.
5. Click **Edit** under the *Actions* column (the first option in the first column of the search results).
6. Perform your edits, and click **Save**.

How to Link an Entry to a Manuscript Record:

Descriptions of the same manuscript will appear in a variety of sources. For example, one manuscript may appear in several different auction catalogs as it is bought and sold over the years. By linking together the entries from those auctions that describe the same manuscript, you help users quickly locate all available data on that manuscript in the SDBM.

The linking tool allows you to link together **Entries** that describe the same physical manuscript. Linked entries constitute a **Manuscript Record**, which has its own SDBM ID number and About page. Linking entries facilitates provenance research, and is an essential task for every database user. **Always search for links for every entry you create**. You may not always find a link for your entry. You will have the option to immediately search for links after saving a new entry (in this case, skip to Step 3 of the instructions below). If you link your entry to other entries that have already been linked, your entry will automatically be added to that Manuscript Record. If you link your entry to other entries that haven't been linked to before, you will create a new Manuscript Record.

1. **Login** to your personal dashboard
2. Locate the entry you want to link.
3. The linking tool consists of two windows: an entry queue in the top half of the page, and a search queue in the bottom half of the page. Use the search queue to search the database for entries that describe the same manuscript as your initial entry. You can automatically search the database by clicking the **Find potential matches** button to the right of the search box.
4. Click **Add to queue** next to entries you think should be linked to your initial entry. As you add entries from the search queue to the entry queue, they will appear alongside your initial entry in the entry queue at the top of the page.
5. Once you add an entry to the entry queue, you will have two possible options:
    a. Select whether the entries represent full links, fragments, or possible links by clicking on the radio buttons in the far left column of the search results.
        i. Select **Link** for entries that describe the same manuscript.
        ii. Select **Fragment** for entries that describe fragments of a manuscript. Fragmented manuscripts are most obvious by sharing many manuscript details with their linked entries except for such key indicators as folio count and the most complete Title listings.
        iii. Select **Possible** if you are unsure whether the entry describes the same manuscript
        iv. Select **Unlink** to remove the entry from the entry queue. This will unlink the entry from a manuscript record.
    b. Entries already linked to a Manuscript Record will have no radio buttons. Instead, you will see a **Link to SDBM_MS** link located under

the *Existing* column of the search results. When you click this link, your entry will automatically be linked to that Manuscript Record. You will automatically be redirected to the Manuscript Record page. Skip ahead to Step 8.

6. Click **Create new Manuscript with these Entries** to link the entries you've selected to a new Manuscript entity.

<u>How to Manages Manuscript Links:</u>

You can manage the entries linked to existing manuscript records via the Manuscript Record Linking Tool. This linking tool looks very similar to the linking tool for entries (see page 10-11), but there are several major differences between the two. The Manuscript Record Linking Tool manages a manuscript record that already exists. The entry queue in the top half of the screen is auto-populated with the entries already linked to that manuscript record. The search queue in the bottom half of the screen only includes one option: **Add this entry to manuscript record**. This is in sharp contrast to the Entry Linking Tool used for entries, where the top queue is not auto-populated, and you are given the option to link to an existing manuscript record or to create a new manuscript record. When using either of the linking tools, be sure to double-check that you are utilizing the correct tool for your desired task. The Manuscript Record Linking Tool will display an SDBM_MS_ID number at the top of the screen (manuscript record ID number); the Entry Linking Tool will display an SDBM_ID number (entry ID number).

1. Locate a manuscript record to which you want to link an entry. You can do this by searching the database and clicking on any SDBM_MS ID number.
2. Click **Linking tool for SDBM_MS_XXXXX** under the *Tools* menu in the manuscript record.
3. You are now at the Manuscript Record Linking Tool for the manuscript record you've chosen. The entry queue at the top of the screen is auto-populated with entries already linked. **Search** the database for other entries describing the same manuscript by utilizing the search queue in the bottom half of the screen. You can automatically search the database by clicking the **Find potential matches** button to the right of the search box.
4. When you find an entry you wish to link, click **Add entry to manuscript record** under the *Actions* column at the far left of the search queue.
5. Select whether the entries represent full links, fragments, or possible links by clicking on the radio buttons in the far left column of the search results.
    a. Select **Link** for entries that describe the same manuscript.
    b. Select **Fragment** for entries that describe fragments of a manuscript. Fragmented manuscripts are most obvious by sharing many manuscript details with their linked entries except for such key indicators as folio count and the most complete Title listings.

c. Select **Possible** if you are unsure whether the entry describes the same manuscript.
d. Select **Unlink** to remove an entry from the entry queue. This will unlink that entry from the manuscript record. **WARNING:** Please exercise extreme caution when unlinking entries from manuscript records. Only unlink an entry when there is clear, definitive evidence that the entry does not describe the manuscript in question. If you have doubts about whether an entry belongs with the manuscript record, add a comment to the Manuscript Record, rather than unlinking the entry.

6. Click the **Save Changes** button at the top of the entry queue once you are satisfied with your changes.

<u>How to Manage Your Sources</u>

1. Sign in to your user account.
2. Click the **Manage Your Sources** link under the *Data Entry Tasks* menu on your dashboard.
3. You are now at your Source Management page. From the *Options* column at the far left of the screen you can **Edit** or **Delete** sources you have added to the database, as well as add a new entry to a source by clicking the **Add an Entry** link**.**

<u>How to Manage Your Manuscripts</u>

1. Sign in to your user account.
2. Click the **Manage Your Manuscripts** link under the *Data Entry Tasks* menu on your dashboard.
3. You are now at your Manuscript Management page. From the *Options* column at the far left of the screen, you can **Edit** or **Delete** manuscript records you have created in the database.

<u>How to Manage Your Comments</u>

1. Sign in to your user account.
2. Click the **Manage Your Comments** link under the *Data Entry Tasks* menu on your dashboard.
3. You are now at your Comment Management page. From the *Options* column at the far left of the screen, you can **Edit** or **Delete** any comment you have created in the database.