

# Daguerreobase

Collective cataloging tool for daguerreotypes  
and daguerreotype literature



## DELIVERABLE

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### D7.3. General user requirements, including IPR guidelines

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## *D 7.3 General user requirements, including IPR guidelines*

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### **1. INTRODUCTION**

This document prescribes the required functionalities of the registration tool and the public website of the renewed daguerreobase, and includes guidelines on intellectual property rights.

Much attention is paid to the functionalities of the registration tool, the core of the renewed daguerreobase. As PIM proposes to use the Memorix Maior platform for the registration tool, some concerns related to the long term sustainability of the renewed daguerreobase arise. Memorix Maior is not an open source application. However, this doesn't mean that Memorix Maior can't be used as registration tool as long as some conditions are met to guarantee the sustainability of the information stored within Memorix Maior. As a consequence, several functionalities are incorporated to ensure that all information (descriptions + images) can be exported from Memorix Maior in a meaningful and standardised way. For this reason, standards are used in an extended way: all exported data must be mapped to the applied international standards within the entitymodel. Secondly, all exported data must be meaningful: f.i. all foreign keys must be replaced with their corresponding actual value or meaning.

Other cornerstones of the functionalities for the registration tool are the entitymodel and the proposed standards on which the consortium agreed on (Cologne, February 2013).

The translation of the entitymodel into a metadata model comprehends also the choice to store documentation about daguerreotypes (manuals, literature, description of camera's, etc.) not in the registration tool, but in the content management system of the website.

## 2. REGISTRATION TOOL

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### 2.1. General

- Database:
  - databasetables and databasefields have a meaningful name
  - the databasemodel is documented. This documentation contains a description of
    - the mapping of the entitymodel and metadatamodel of the renewed daguerreobase to the corresponding datatables in which the actual data are stored
    - the relationships between the datatables
  - users with the role of administrator (see 3. User management) have (read-only) access to the database or to backups of the database. These backups can be downloaded by administrators.
- Linked (file)servers:
  - the link between daguerreotypes and digital images is described
  - users with the role of administrator have (read-only) access to this (file)servers or to copies/backups of the images
- Backups:
  - backups of the database and linked images are available
  - the frequency of backups is high enough to prevent dataloss
  - the backups available for download by users with the role of administrators are in an open and standardised file format
- User interface:
  - the primary languages for the user interface are English, French and Dutch
  - if a translation of the user interface is provided by the consortium, users can switch to a translation of the user interface
- Entries lists/controlled vocabularies:
  - the primary language for the entries lists/controlled vocabularies is English
  - if a translation of the entries lists/controlled vocabularies is provided by the consortium, users can switch to a translation of the entries lists/controlled vocabularies
- Help:
  - the registration tool has a context-sensitive help on each form or webpage
  - authorised users can edit the help text
  - the registration tool is linked to an online tutorial or manual for the description of

daguerreotypes (see 3. Public website)

## **2.2. User management**

- The registration tool has the following hierarchical user roles:
  - a contributor:
    - can add, edit and delete daguerreotypes (description + images)
    - can import and export daguerreotypes (description + images)
  - an editor:
    - has the same rights as a contributor
    - can create user accounts for contributors
    - can create and describe subcollections
    - can change the publication status for daguerreotypes on the daguerreobase website
    - can change the publication status for daguerreotypes on the Europeana website
  - an administrator:
    - can create user accounts for editors
    - can create collections
    - can create predefined profiles/presets for technical descriptions
    - has access to the database of the registration tool or to backups of the database
    - has access to the server on which the linked images are stored or to backups of the images
- Contributors and editors are assigned to institutions and collections and can only add, edit or delete daguerreotypes (description + images) which are part of the assigned (sub)collection.

## **2.3. Institutions / Collectors**

### **2.3.1 INSTITUTIONS**

- ISDIAH is used for the description of institutions
- the functionality of EAG-XML as import and export format for ISDIAH-descriptions can be added to the registration tool. The PMB decides on the necessity of this functionality, depending on the amount of institutions besides the consortium partners which makes use of the daguerreobase.

### **2.3.2 COLLECTORS**



- (private) collectors are described as actor. ISAAR(cpf) is used for the description of actors.
- EAC-XML is used as import and export format for ISAAR(cpf)-descriptions

## **2.4. Collection management**

- daguerreotypes can be grouped in collections and subcollections. For this purpose daguerreotypes can be:
  - linked directly to an institution (ISDIAH) or (private) collector (ISAAR(cfp))
  - aggregated in subcollections
- subcollections can be described: name, provenance, history, acquisition
- the description of subcollections can be exported to XML.
- on the level of (sub)collections and object description the status of daguerreotype descriptions can be changed:
  - draft / final
  - not published / published on the website of de daguerreobase
  - not published / published on the Europeana website
- the following reports can be generated:
  - all daguerreotypes belonging to one institution/collector and/or subcollection

## **2.5. Description of daguerreotypes**

### **2.5.1 GENERAL**

- each description of a daguerreotype consists of:
  - 1 content description
  - 1 description of the technical characteristics
- there's a 1-to-1 relation between the content description and the description of the technical characteristics
- each description of a daguerreotype has the following statuses:
  - draft / final
  - not-published / published on the daguerreobase website
  - not-published / published on the Europeana website
- a find and replace operation is possible on multiple descriptions
- all changes to descriptions with the status 'final' can be documented: date and time, username, description of the change
- export of database records:



- each description of a daguerreotype can be exported to XML format
- for each daguerreotype 2 XML-documents are generated:
  - a Dublin Core XML for the content description
  - a XML-document according the new XML-Schema for the technical description that's going to be established as part of WP3.
- both XML-documents are stored in the same directory. Directories are created for each collection and subcollection, e.g.:
  - FoMu
    - Collection#1
    - Collection#2
- the filename of both XML-documents uses the following pattern:
  - [ID]\_[CD|TC].xml:
    - [ID]\_CD.xml for the content description
    - [ID]\_TC.xml for the description of the technical characteristics
- an export of all descriptions can be triggered for all daguerreotypes belonging to one (sub)collection by users with the role of editor. If the entire (sub)collection of an institution or collector is described, the description of the institution, the actor and subcollection is also exported. The XML-documents with the description of the institution, actor and subcollection are stored in the rootfolder of the export.
- if a daguerreotype description is linked to images, those images are exported to the same directory as the XML-documents with the content descriptions and description of the technical characteristics. All available and stored representations of the images are exported, including refs and thumbs. The filename of the linked images start with the ID of the daguerreotypes:
  - 1234\_CD.xml
  - 1234\_TC.xml
  - 1234\_image001.jpg (ref)
  - if available in the registration tool: 1234\_image001\_t.jpg (thumb)
  - 1234\_image002.jpg (ref)
  - if available in the registration tool: 1234\_image002\_t.jpg (thumb)
  - ...
- the export-function can be called for an entire institutional collection, a subcollection or for selected objects
- if the export-function is developed as a scheduled task, the user receives a notification with downloadlink when the export is available
- export failures or errors are registered in a logfile. The user who requested the export receives a notification of the errors and at least a downloadlink for the logfile.

## 2.5.2 CONTENT DESCRIPTIONS

- Dublin Core is used as metadatamodel for the content descriptions
- import:



–CSV and Dublin Core XML are supported as import format for content descriptions

–content descriptions can be imported in bulk (CSV, XML)

■ export:

–content descriptions can be exported in Dublin Core XML format

### 2.5.3 TECHNICAL CHARACTERISTICS

■ users receive a warning when not all mandatory fields are described

■ predefined description sets can be used for the description of recurring case types

–administrators can define predefined sets of case types

–users and editors can add available metadata fields to the predefined sets when describing a particular daguerreotype

■ import:

–CSV is available as import format for the descriptions of the technical characteristics

–XML will be available as import format when the new XML Schema for technical characteristics is available

■ export:

–the descriptions of the technical characteristics can be exported in XML format when the new XML Schema for technical characteristics is available

## 2.6. Images

■ daguerreotypes can be linked to one or more digital images

■ users can upload multiple images at once and link them to the daguerreotype

■ if multiple images are linked to the same daguerreotype, users can define the order in which the images are presented

■ thumbs for the images are automatically created

■ if provided at (sub)collection level, a watermark is shown when the image is published on the public website

## 2.7. Reports and statistics

### 2.7.1 REPORTS

■ the following reports are available:

–list of all daguerreotypes of one (sub)collection, with filters on:

■ draft / final status

■ not-published/published on the daguerreobase website

■ not-published / published on the Europeana website





- image not available / image available
- descriptions with mandatory fields left empty
- users with the role of administrator can generate the reports for each institution / collection
- users with the role of editor can only generate the reports for their own institution and (sub)collections

## 2.7.2 STATISTICS

- the following statistics are weekly registered:
  - number of described daguerreotypes for each institution / collector
  - number of published daguerreotypes for each institution / collector
  - number of descriptions linked to Europeana for each institution / collector
  - number of daguerreotypes with linked images for each institution / collector
- the following statistics are kept for each daguerreotype:
  - number of unique visitors who viewed the description and the image of a daguerreotype
- users with the role of administrators have access to the statistics for each institution / collector
- users with the role of editor have only access to the statistics for their own institution and (sub)collection

## 3. PUBLIC WEBSITE

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The public website offers the following functionalities:

- search functionalities
- presentation of (sub)collections, images of daguerreotypes and their descriptions
  - use of persistent links
- knowledge base (e.g. a wiki) on daguerreotypes, literature, manuals, equipment, documentation
  - editing
  - presentation
  - searching
- publication of manuals on the description and the digitisation of daguerreotypes
- presentation of the project and its partners
- news pages
- blogs
- calendar
- integration with social media

## 4. INTELLECTUAL PROPERTY RIGHTS

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- These guidelines focus primarily on one aspect of Intellectual Property Rights (IPR), more specifically copyright. This law is the most relevant within the framework of the Daguerreobase-project.
- Copyright protection applies to:
  - a materialized and original creation
  - 70 years after death of author
  - publication of copyright protected creations
  - reproduction and re-use of copyright protected creations
  - by exception non-commercial heritage institutions (museums, archives, libraries, ...) are allowed to make reproductions for preservation objectives

### 4.1. Content

- The daguerreotypes and their digitised images are considered as being the content of the Daguerreobase.
- Providing content to the Daguerreobase does not affect the ownership of the daguerreotypes.
- When providing content to the Daguerreobase content providers give Daguerreobase the permission to manage this content and to do with it whatever is necessary to maintain the content in good order without unwanted alterations or loss of information. It does not give Daguerreobase the permission to publish the content or re-use it in any other way beyond the scope of Daguerreobase.
- Merely providing content to the Daguerreobase is not considered to be a publication. As long as the content is not-published it's considered to be "intra muros". In that case you are just reproducing content. This is according to the existing exceptions to the copyright law allowed for heritage institutions (museums, archives, libraries, ...).
- The moment you choose to publish content there are no expectations. Content providers have to ensure that copyrights are governed.
- For the daguerreotypes older than 150 years we can assume that all authors, photographers of classical daguerreotypes deceased for at least more than 70 years ago. These daguerreotypes are therefore part of the public domain. Cfr. <http://pro.europeana.eu/web/guest/public-domain-content>.
- For those daguerreotypes who are from later than 1875 content providers must verify the date of death of the photographer. If it is less than 70 years ago, there is still copyright protection and content providers should check who holds the copyrights. While managing and publishing these daguerreotypes in the daguerreobase content providers must respect the copyrights: content providers must hold the copyrights or must have the permission from the holder of copyright to publish the daguerreotypes. According to the applicable copyrights content providers can choose or have to use one of the following rights statements (cf. <http://pro.europeana.eu/web/guest/available-rights-statements>):
  - The Creative Commons CC0 1.0 Universal Public Domain Dedication (CC0)
  - Creative Commons - Attribution (BY)
  - Creative Commons - Attribution, ShareAlike (BY-SA)
  - Creative Commons - Attribution, No Derivatives (BY-ND)

- Creative Commons - Attribution, Non-Commercial (BY-NC)
- Creative Commons - Attribution, Non-Commercial, ShareAlike (BY-NC-SA)
- Creative Commons - Attribution, Non-Commercial, No Derivatives (BY-NC-ND)
- Rights Reserved – Free Access
- Rights Reserved – Paid Access
- Rights Reserved – Restricted Access
- Unknown (orphan works)
- The same applies to images of daguerreotypes that are the result of an intellectual effort of the photographer and are an expression of his personality.
- The digital images of daguerreotypes and used as preview or representation in the Daguerreobase aren't considered to be copyright protected in itself. They are considered to be merely reproductions without any creative input.

## 4.2. Metadata

- The information about daguerreotypes that is put into the Daguerreobase is considered to be the metadata of the Daguerreobase.
- The institutions or collectors who provide metadata to the Daguerreobase are and remain the owner of this metadata.
- When providing metadata to the Daguerreobase content providers give Daguerreobase the permission to manage this metadata and to do with it whatever is necessary to maintain the metadata in good order without unwanted alterations or loss of information. It does not give Daguerreobase the permission to publish any metadata or re-use it in any other way beyond the scope of Daguerreobase.
- Merely providing metadata to the Daguerreobase is not considered to be a publication. As long as the metadata is not-published it's considered to be “intra muros”.
- The moment content providers choose to publish content there are no expectations. Content providers have to make sure that copyrights are governed.
- For all descriptive metadata provided to Europeana, content providers grant Europeana the right to publish the metadata under the terms of the Creative Commons CC0 1.0 Universal Public Domain Dedication. This means that all metadata provided to Europeana can be re-used by third parties without any restrictions.
- Outside the metadata that will be provided to Europeana, within the metadata model of daguerrobase there isn't really much “creative” and therefore copyright protected metadata. Therefore it is appropriate to the Daguerreobase to follow a similar policy as Europeana:
  - For all metadata provided to Daguerreobase and designated as to publish, content providers grant Daguerreobase the right to publish the metadata under the terms of the Creative Commons CC0 1.0 Universal Public Domain Dedication. This means that all metadata published by the Daguerreobase can be re-used by third parties without any restrictions.
  - All metadata provided by the partners within the framework of the daguerreobase-project will become public domain under the terms of the Creative Commons CC0 1.0 Universal Public Domain Dedication anyway, published or not-published. This is because these have been established with European funding.
- To formalize this a data exchange agreement will be drawn up between the content providers and the Daguerrobase. This will require a consortium or legal body to be established.



- This Daguerreobaseconsortium will in itself make an data exchange agreement with Europeana, cf. <http://pro.europeana.eu/web/guest/data-exchange-agreement>. This way, the content providers themselves do not have to make an agreement with Europeana.

### **4.3. Assets of the project**

- The assets of the project are the deliverables.
- Any intellectual property rights on the deliverables will be granted to the Daguerrobase except those that can not be alienated like f.i. the moral rights of the creator of a copyrighted work.
- If a projectpartner contributes to some resources in the project that aren't created within the scope of the Daguerreobaseproject the projectpartner or owner of these resources and related intellectual property rights can choose the conditions under which these resources are made available for the project.