

panMetaWorks

A metadata based scientific information exchange system



User Manual

Version 1

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panMetaWorks is a collaborative, metadata based data and information exchange platform for science.

Researchers can use panMetaWorks to collect and share a variety of information sources such as documents, datasets, webpages as well as citations.

Describe

panMetaWorks is metadata based, it was designed to especially support researchers to properly describe their sources by an appropriate set of descriptors.

Metadata handling in panMetaWorks is very flexible. All necessary metadata elements can be freely defined at project level. These project defined elements can be mapped to standard Darwin Core fields.

Upload

Any electronic resource needs to be described before it can be uploaded to the system. A variety of file types is supported by the system e.g. text, images, pdf, MS Office and OpenOffice file types.

Share

Uploaded datasets (metadata and associated sources) which shall be shared with others can be assigned by different access levels. Datasets can be completely hidden and locked, visible for other members of a distinct project, shared for collaborative working or finally offered for download to the interested public.

Publish

Once published, datasets can be disseminated by different channels. panMetaWorks supports common standards such as the metadata exchange protocol OAI-PMH, which can be used to feed e.g. portal systems such as [panFMP](#). It further supports news feed standards such as Atom and RSS.

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Registering

First time users need to register first in order to be able to use panMetaWorks. To register, visit the homepage of panMetaWorks at <http://metaworks.pangaea.de> and click on 'Click here to register' link which is located beyond the login box at the left side of the homepage.

After you have clicked you'll see a simple page where you need to provide some information on yourself, a username, password (>=8 characters) and most important, you need to choose the project you wish to join initially.

panMetaWorks beta

User Registration:

Firstname:	<input type="text" value="Robert"/>
Lastname:	<input type="text" value="Huber"/>
Email:	<input type="text" value="testertest@googlemail.com"/>
Project:	<input type="text" value="SPICOSA"/>
Username (>8 characters):	<input type="text" value="testertest"/>
Password (>8 characters):	<input type="password" value="*****"/>
Repeat password:	<input type="password" value="*****"/>
<input type="button" value="Register"/>	

Fig. User registration page

Whereas you can choose whatever username you like, it is important to enter your **real name** in the fields Firstname and Lastname, because your account will be validated by the project's administrator before you get access to the system. Very important is to enter a valid email address, as this is the address the system will send a validation email.

After you have provided your user information, click on the 'register' button. If you have correctly filled the registration form you will see a confirmation message like this:

User Registration:

Thank you for registering!

An email has been sent to the address you entered below, please follow the instruction in this email to finish the registration procedure

If you are already registered and validated, please try to [login here](#)

Fig. Registration confirmation

The panMetaWorks registration system will automatically send you a confirmation email to the email address you provided. This email is mainly necessary to verify your email address and to avoid that you are involuntarily registered to the system by someone else.

This email will be sent by **'noreply'** and will have the subject: **'Your panMetaWorks registration'**. Open this email and you will find a internet link in the message:



Fig. Email notification, email verification

You will now need to either copy&paste this link to your internet browser or if it is displayed as clickable link, simply click on this link to finish your registration. After clicking the link you will again be directed to panMetaWorks and you will see a message confirming the successful registration:

panMetaWorks **beta**

User Registration:

You are now registered to **panMetaWorks**.

Your request to join the project you have chosen has been sent to the project admin.

You can now [login here](#), but you will have to wait for the approval by the project admin to start working within this project


Fig. registration last step

Please keep in mind that your account still has to be confirmed by the project administrator. This person will automatically be noticed by email that a new user has applied to get access to his project. The administrator will actively check if you really are a member of this project and confirm this. However, this may take some time. If the administrator has not yet approved your project membership, you will see this message after login:

panMetaWorks **beta**

Notice: Despite you are registered and logged in you are **not** (yet) a member of this project. Maybe your request to join this project has not yet been approved by the project administrator.

The administrator already has been notified by email that you have registered. However, if you feel this process is too slow, you can send an additional reminder email to: robert@stratigraphy.net

 reminder: recordatorio; recordatorio; de pago

Login

To login, enter your username and password at the login entry field at left side of the panMetaWorks homepage and click on the 'submit' button.

Welcome to panMetaWorks

Login:
Username:
Password:

[Click here to register](#)

A metadata based scientific information exchange system

panMetaWorks is a collaborative, metadata based data and information exchange platform for science. Researchers can use panMetaWorks to collect and share a variety of information sources such as documents, webpages



Describe

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If your account has been approved by the administrator you are immediately redirected to the project workspace.

Project Workspace (home)

Project entries (datasets) overview screen

The project workspace (home) is the most important window during your work with panMetaWorks.

Datasets

View: **Project data sets** in: **All folders** [Change View](#) [RSS](#)

No	Date	Entry ↑	File	Status
1	2009-03-17	Alternative Strategies - Technical Options - Management Examples. (2008) by: <i>Ahmet Baban</i>		
2	2009-03-17	Draft data template for technical options. (2008) by: <i>Ahmet Baban</i>		
3 <input type="checkbox"/>	2009-03-30	Excel Test. by: <i>Excel Excel</i>		
4 <input type="checkbox"/>	2009-04-20	fhgfhf. by: <i>dgfdff</i>		
5 <input type="checkbox"/>	2008-11-13	First SPICOSA Document. by: <i>Robert Huber</i>		
6	2009-03-17	Technical options example Mare Piccolo. (2008) by: <i>Ahmet Baban</i>		
7	2009-03-30	test of test. by: <i>Robert Huber</i>		
8 <input type="checkbox"/>	2009-04-08	Texttest. by: <i>Huber, R</i>		
9	2009-01-29	User manual Model Library (German). (24.09.2008) by: <i>dsy</i>		

With selected do: [Do it!](#)

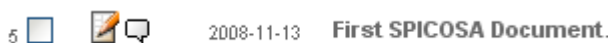
In the center of the workspace page, there is an overview of the latest entries made in your project. At the uppermost part of this overview you can decide if you wish to exclusively see the entries you have created or also those entries created by other project members (light blue colored entries).




To switch between these modi, use the select list to choose between 'My data sets' and 'Project data sets'.


Additionally you can choose one of the folders to see the contents of this folder only. Click on 'Change view' to submit your choice. Alternatively you can also click on one of the folders in the box on the right side of the window to see contents of this folder.


To select an entry e.g. to move it to a different folder, use the check box,



which are displayed immediately after the entry number. Depending on the access level of an entry, this check box is hidden in order to prevent e.g. protected entries from change.

To see details of a distinct entry or to modify it's metadata, click on the edit  icon and you will be directed to the editing form.

If you wish to comment an entry click on the  speech bubble icon and you will be redirected to the commenting form.

On the right side of each entry there are file icons (file type specific) of the uploaded files belonging to each entry. You can directly download/view these files by clicking on such an icon. On the example screenshot above, the first entry has a pdf file  attached which would be shown after you click on the pdf icon.

Additionally shown is the **access level** of each entry. After you have created an entry you can choose several access levels for your entry which these icons represent:



Private: can only be edited and seen by the owner/creator



Visible for project members: Metadata can be seen by project members, associated files can be downloaded by project members, can exclusively edited by owner



Editable for project members: metadata can be edited, changed by project members, , associated files can be downloaded by project members



Published: This entry will be offered by the integrated OAI-PMH interface and can be transferred to e.g. a project portal.


Ready to be archived: This entry which represents a dataset can be transferred to an appropriate data archive (e.g. PANGAEA)




Metadata incomplete: Some metadata for this entry are missing and you will need to complete these in order to proceed and e.g. upload associated material.

Entries which belong to another user, but are published or have at least the 'visible for project members' status are displayed slightly different, they will appear with a differently colored background.

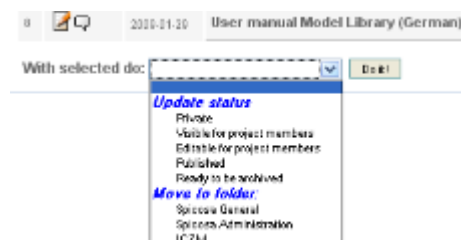
Finally, to delete an entry or dataset (only possible for its owners), simply click on the trash icon

 which is displayed beyond each entry.

Project entry operations (change folder and status)

panMetaWorks offers the possibility to quickly organize the status or move multiple entries to a different folder. To perform these operations on your entries you have to click on the checkbox  in front of each entry to select one or more entries you intend to manipulate.

After you have chosen the entries you wish to e.g. move to a different folder you have to choose the type of action. Use the 'actions' drop-down list labelled with **'With selected do:'**



which is located at the bottom of the page to update or change the status or to move the selected entries to a different folder. Choose the action or target (folder or status) of this action respectively and click on the 'Do it!' button.

Navigation and Search

To navigate in a longer list of datasets use the 'Next->' and '<-Previous' links which are displayed on top and bottom of the entries list. Additionally, entries can be moved to project folders as described

in the above section of this document.



To navigate between these folders you can use the Explorer-like folder tree on the right side of the page. Simply click on the folder name to see the contents of this folder. If you wish to see all entries regardless the folder they are located in, click on the 'Show all datasets' link.

panMetaWorks offers a simple search page to search in the metadata fields you have entered. To reach this page click on the 'Search' link in the main menu.



For queries on panMetaWorks by default only exact matches are returned. However you can use the wildcard % to perform fuzzy searches:

- *'data'* will return exactly datasets which contain this keyword in the metadata
- *'%data'* will return also datasets containing metadata which end with data e.g. 'Supplementary data'
- *'data%'* will return also datasets containing metadata which begin with data e.g. 'data forest'
- *'%data%'* will return also datasets containing metadata which contain with data e.g. 'clear data forest'

Create a new Entry

Metadata

To create a new entry or dataset, click on the   New/Edit tab at the main menu on top of the panMetaWorks page. You will be redirected to the main entry window.

panMetaWorks allow to define several project specific entry forms. These forms have to be changed and defined by the administrator. To enter a new entry or dataset, you have to choose the appropriate form type by using the 'Entry form type' drop-down list:

Preferences:

Entry form type:	Minimal	Change
Identification	Minimal	
	Documents (Spicosa)	
	Data (Spicosa)	

In the example shown, three form types are allowed: 'Minimum', which is the simplest form type as well as 'Documents' and 'Data'.

Minimum is a system defined form, which is always available and allow to enter a **document title**, **publication year** and **authors** only.

The other two form types are more sophisticated and allow to enter a variety of metadata e.g. needed to enter a new publication of data set.

To switch between these form types, choose the appropriate type in the drop-down list and click on the 'Change' button. The new form type will appear:

Enter Metadata

Please provide the metadata of your new dataset here:

Metadata	File(s)
<p>Preferences: Entry form type: <input type="text" value="Data (Spicosa)"/> <input type="button" value="Change"/> Destination Folder: <input type="text" value="All folders"/></p> <p>Identification Title: <input style="background-color: #ffe6e6;" type="text"/> Date: <input type="text"/> Author (1): <input style="background-color: #ffe6e6;" type="text"/> <input type="button" value="+"/> Source: <input type="text"/></p> <p>Spatial Coverage Min. Latitude: <input type="text"/> Max. Latitude: <input type="text"/> Min Longitude: <input type="text"/> Max. Longitude: <input type="text"/> Location (1): <input style="background-color: #ffe6e6;" type="text"/> <input type="button" value="+"/></p> <p>Data Measurement/Parameter (1): <input style="background-color: #ffe6e6;" type="text"/> <input type="button" value="+"/></p>	<p style="background-color: #ffe6e6; text-align: center;">File upload is disabled. Some or all required metadata is missing</p>

In this entry window, you will see two main sections labeled with '**Metadata**' and '**File(s)**' respectively. On the left 'Metadata' field you can enter the metadata for your new entry which are optionally grouped in several categories for easier orientation.

Fields for metadata elements which may contain more than one entry, e.g. the 'Author' field, can be extended by clicking on the plus button to open additional fields. Use the minus button, to delete fields.

Author (1):

Author (2):

Author (3):

Mandatory fields are displayed with a light red background. Unless you have not yet entered all mandatory fields, panMetaWorks will not allow the upload of files. In the shown example above, the 'File(s)' section on the right side is therefore only showing a red message indicating that file upload is disabled.

Upload

After you have completed the metadata entry, the 'File(s)' on the right side of the screen will change and show a file upload form:



For security reasons, upload of files is restricted to these file types:

- Text (including tab delimited tables, html, xml)
- Richtext
- MS-Excel
- MS-Word
- MS-Works
- MS-Powerpoint
- Postscript
- PDF
- Image types (gif, png, jpeg, tiff)

Further, the file size is restricted to 50 Mbytes.

To upload a file, click on the '**Browse**' button and choose the file you wish to upload and click on 'Open'. The file name should now appear in the text field in front of the 'Browse' button. Click now on '**Upload**' to send the file to the panMetaWorks server.

Alternatively you can also enter the URL of a remote file, this may be useful if the file you wish to submit is located on the Internet. In this case, panMetaWorks will try to download the remote file from this location. You can submit URLs by just entering it in the text field shown below and clicking on the '**Download**' button.

Remote file location (URL):



Important! *Avoid any legal, intellectual property rights problems. If you are not the owner of this file, please clarify if you have the permission to do this with the owner !*

If the upload process was successful, you will see the file appear in a new 'Dataset Files' field beyond

the upload dialogue.



To delete this file, simply click on the trash icon. To view the file, click on the name of the file.


The upload of files can fail for several reasons:

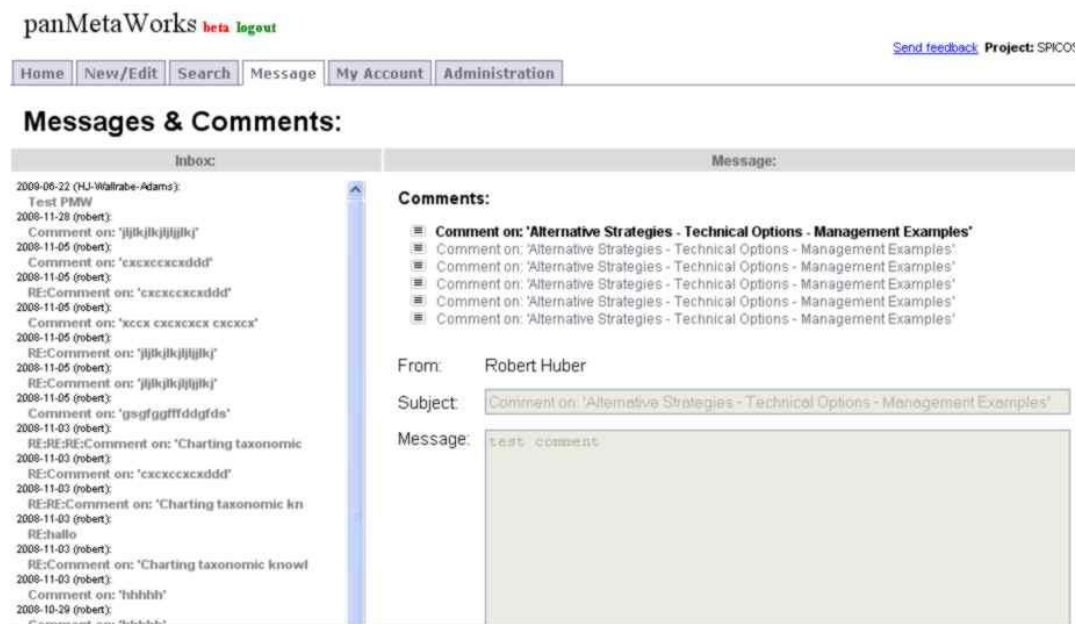
- Slow internet connection and time out
- The file you try to upload exceeds the allowed file size limit (currently 50Mb)
- The document type is not supported.

In any case you will see a error message with a detailed report.

Comments and messages


panMetaWorks offers a simple way to either comment data sets or to communicate with other project members.


To comment a dataset, click on the  speech bubble and you will be directed to the 'Messages & Comments' section of panMetaWorks.



You will see all comments related to this dataset on top of the main window. You can read a comments by clicking on the title of this comment. You can start a discussion or reply on this

comment by clicking on the **'Reply'** button.

To create a new comment, click on the **'New comment'** button. The titles (subjects) of comments generally start with the words *'Comments on:'* followed by the title of the dataset you comment on. This subject line cannot be changed. To send and submit your comment click on **'Send'** button. The comment will be automatically be sent to the Inbox of the dataset's owner and is of course displayed on the panMetaWorks main window in brackets after the bubble icon .

Beneath commenting you can also send messages to other panMetaWorks users. To start a conversation, click on the messages tab  **Message**  in the main menu.

You will have to choose a recipient from the **'TO:'** drop down list. Write your message and use again the **'Send'** button to send your message.

All messages sent to you are displayed in the Inbox which is displayed in the left part of the page. To read one of these messages just click on the title of this message. Unread messages are displayed in bold font.

User account management

You can change the settings of your user account by clicking on the **'My Account'** tab in the main menu. You will be redirected to a page where you can change your settings. For example you can change your email address or your real name.

To change your password, enter the new password in the **'password'** text field and repeat it in the **'repeat password'** text field. Your password has to contain at least 8 characters.

panMetaWorks beta [logout](#)

[Home](#) [New/Edit](#) [Search](#) [Message](#) [My Account](#) [Administration](#)

Your account:

Firstname:

Lastname:

Email:

Institution:

Interest Groups: You are member of:

Project: You are member of:

- IODP waiting for approval
- Test
- ESONET
- SPICOSA
- hypox

Username (>8 characters):

Password (>8 characters):

Repeat password:

Some projects have special interest groups to enable more sophisticated messaging and grouping of information's. This functionality is not yet completely implemented. To join a interest group choose one of the groups in the Interest group drop down list and click on the '**Join interest group**' button.

In your account summary you can also see a list of other projects currently supported by panMetaWorks. If you wish to join a new group choose this group from the drop down list and click on the 'Join group' button. The project administrator needs to verify your project membership.

Disclaimer and Contact

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