SAEON Data Portal
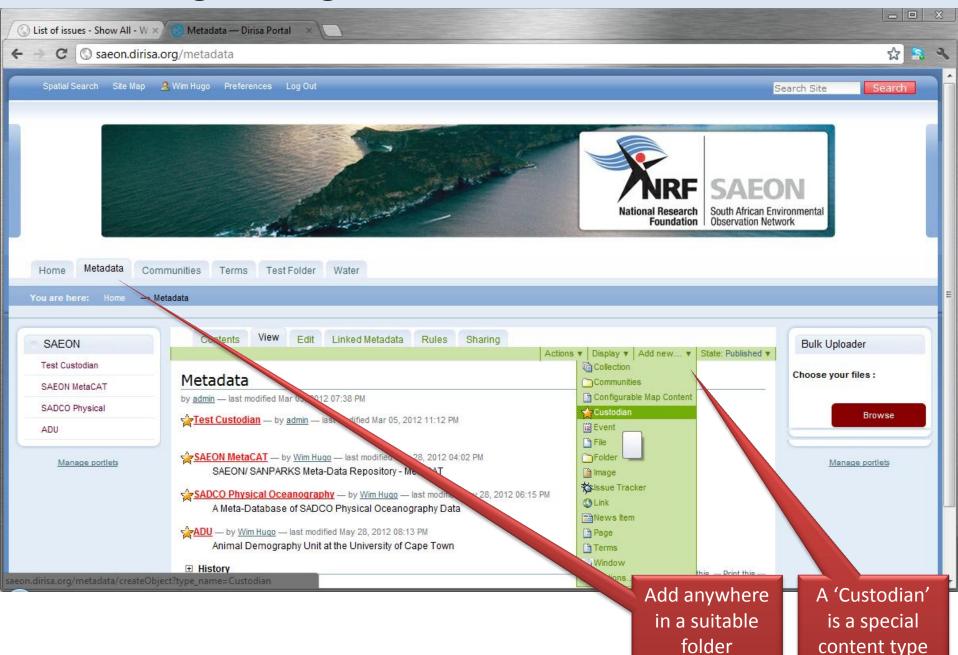# How to Work with Custodians

Last Updated May 2012
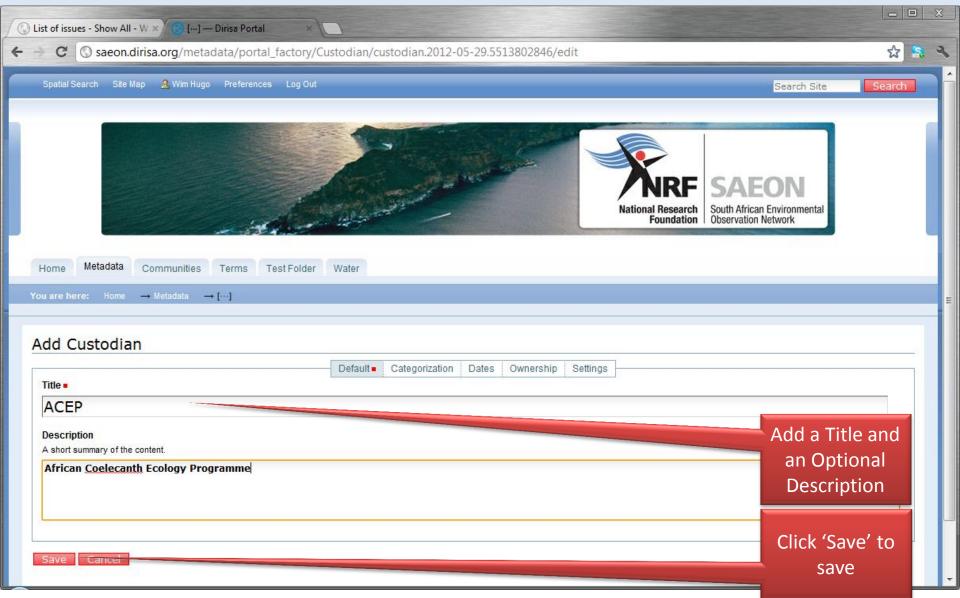
W Hugo

G342.4.2.1 1 How to Work with Custodians

Prerequisites

- One or more meta-data records are needed
  - As a Service
  - As electronic XML files
  - As information that can be provided

- Terms and Conditions (if any) need to be available

- Nice to have
  - Blog on Contact with Custodian/ Provider
  - Agreement
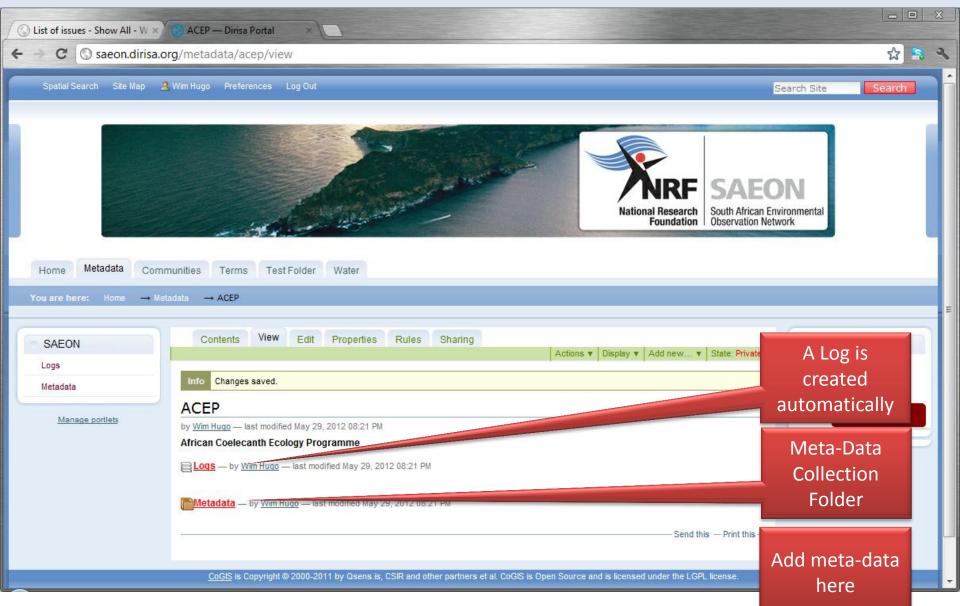 - To do list
  - Frequency of Update/ Other Notes

Registering a Data Provider/ Custodian

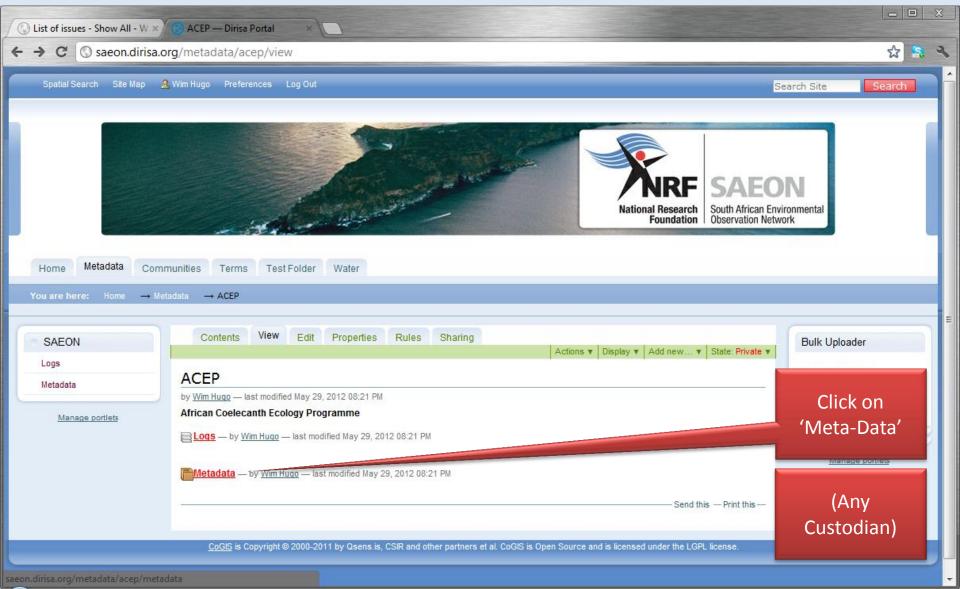Add anywhere in a suitable folder

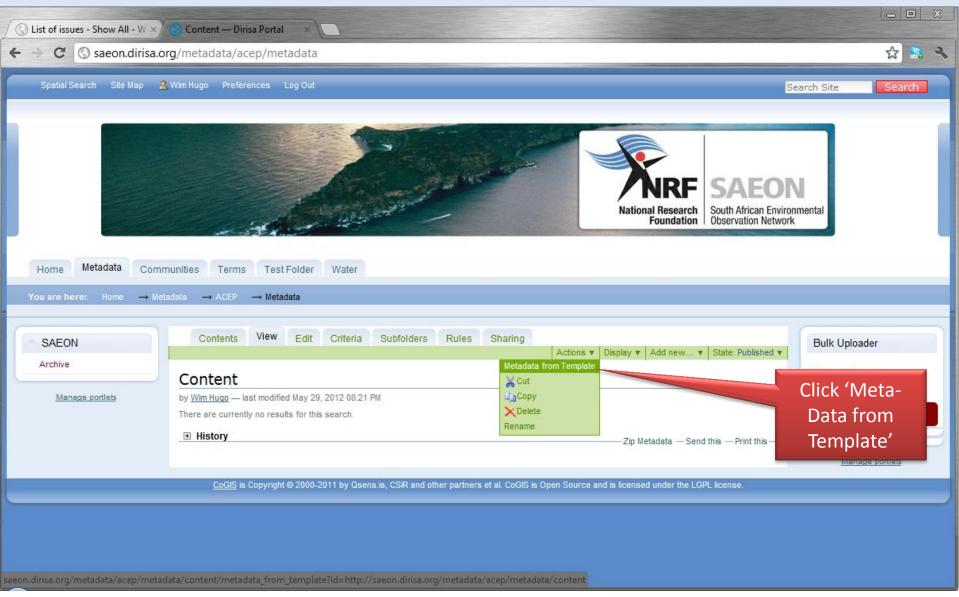A 'Custodian' is a special content type

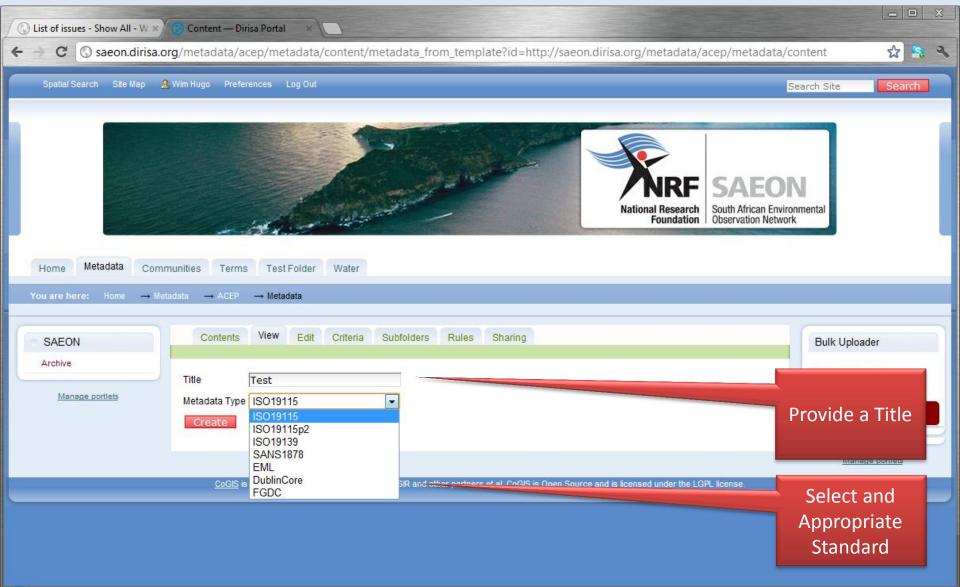# Fill in Particulars

Default Structure

Meta-Data Acquisition

Option 1: Create from Template

Create from Template

Provide Details

Standards Guide

- EML:
  - Ecological or Environmental Data without an explicit spatial dimension or a non-varying spatial dimension
- SANS 1878
  - Vector data (spatial data, SOS) (local profile, SDI Act)
- ISO 19115
  - Vector data (spatial data) (not recommended)
- ISO 19115p2
  - Raster data and coverages
- FGDC
  - Don't use – deprecated and US Only
- Dublin Core
  - Use for documents, folders, images, reports, …

'Blank' Meta-Data based on Template

Editing Meta-Data

Saved Record is Validated

Updated Record from Template

Bounding box has been updated

Option 2: Import from File

Select from 'Add New' menu

Click on 'Meta-Data'

Specify a File to Upload

File is uploaded …

Option 3: Register a Harvester

Specifying a Harvester

Detailed Specification

- Standard:
  - Select an appropriate standard

- Transport:
  - HTTP:
    - Any web folder containing a zipped file.
    - Any standard
  - OAI
    - Service URL
    - EML and Dublin Core
  - CSW
    - ISO 19115, FGDC, and SANS 1878
  - CSW-New (Tested with EuroGEOSS)
    - ISO 19115, FGDC, and SANS 1878
  - FTP
    - Any FTPfolder containing a zipped file.
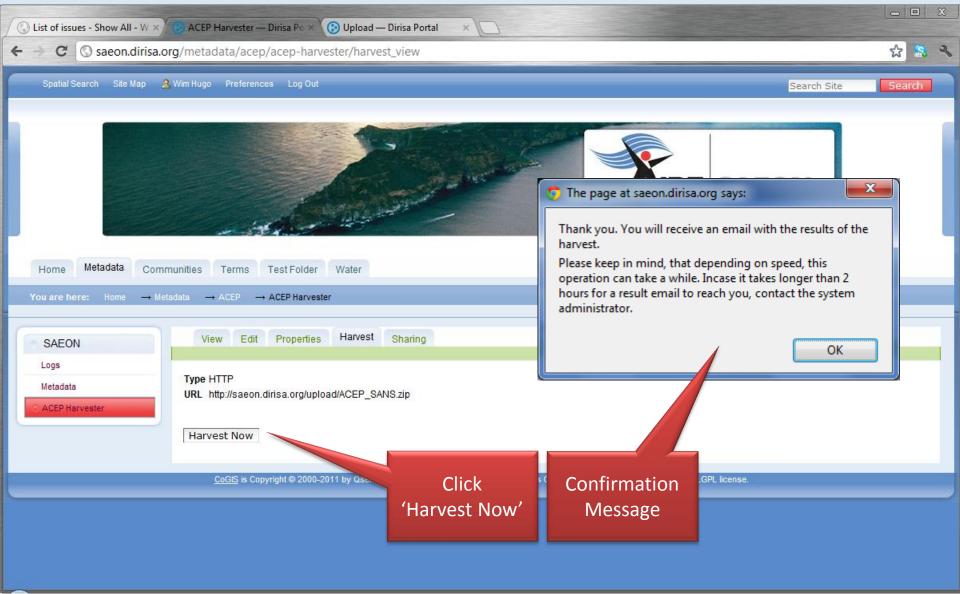   - Any standard

- Update Frequency
  - Never = Manual

Example

Saved Harvester

Harvest Trigger

E-Mail Progress Messages

E-Mail Progress Messages

Harvester "Harvester" progress report (from 11:15 12-06-01 to 11:25 12-06-01) - Message (Plain Text)

From: mike@webtide.co.za   **Sent:** Fri 2012/06/01 11:26 AM
To: wim@saeon.ac.za
Cc:
Subject: Harvester "Harvester" progress report (from 11:15 12-06-01 to 11:25 12-06-01)

Complete: Harvested 266 record with 6 errors: previously unreported errors follow: (also see the Harvester logs for further details):
* Document http://saeon.dirisa.org/metadata/saeon-metacat/metadata/meta133854272196 could not be published due to 'XML is invalid. Use 'Edit Metadata' to fix it first.' but was published provisionally.
* Document http://saeon.dirisa.org/metadata/saeon-metacat/metadata/meta133854272316 could not be published due to 'XML is invalid. Use 'Edit Metadata' to fix it first.' but was published provisionally.
* Document http://saeon.dirisa.org/metadata/saeon-metacat/metadata/meta133854272434 could not be published due to 'XML is invalid. Use 'Edit Metadata' to fix it first.' but was published provisionally.
* Document http://saeon.dirisa.org/metadata/saeon-metacat/metadata/meta13385427257 could not be published due to 'XML is invalid. Use 'Edit Metadata' to fix it first.' but was published provisionally.
* Document http://saeon.dirisa.org/metadata/saeon-metacat/metadata/meta133854272709 could not be published due to 'XML is invalid. Use 'Edit Metadata' to fix it first.' but was published provisionally.
* Document http://saeon.dirisa.org/metadata/saeon-metacat/metadata/meta133854272849 could not be published due to 'XML is invalid. Use 'Edit Metadata' to fix it first.' but was published provisionally.

Click on a photo to see social network updates and email messages from this person.

Connect to social networks to show profile photos and activity updates of your colleagues in Outlook. Click here to add

Meta-data does not validate
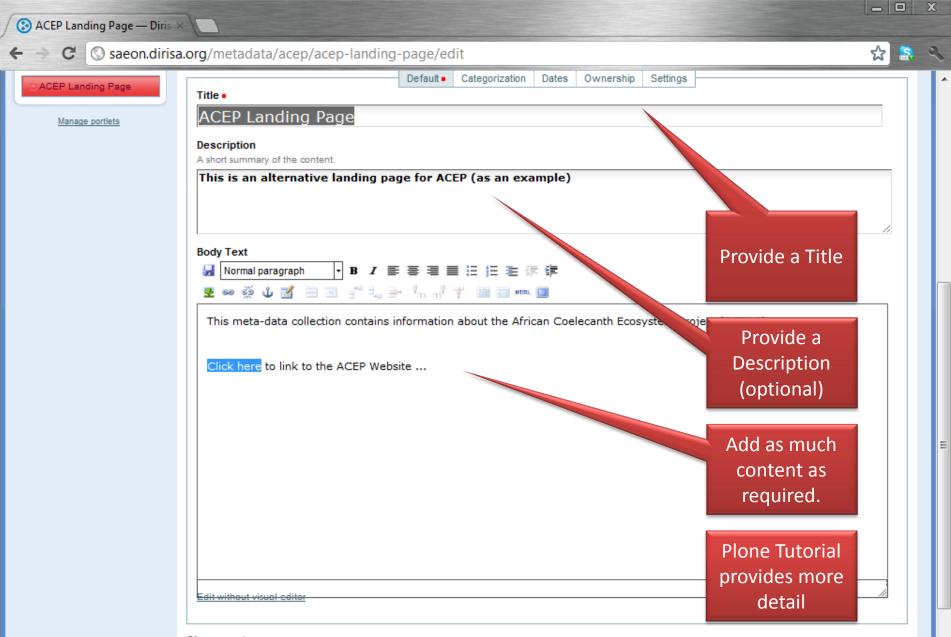
Adding Extras

- Options
  - A Plone HTML Page
  - A Custom Page in a Window

- Why?
  - Meta-data records link back here
  - Additional Contact Details and Supporting Information
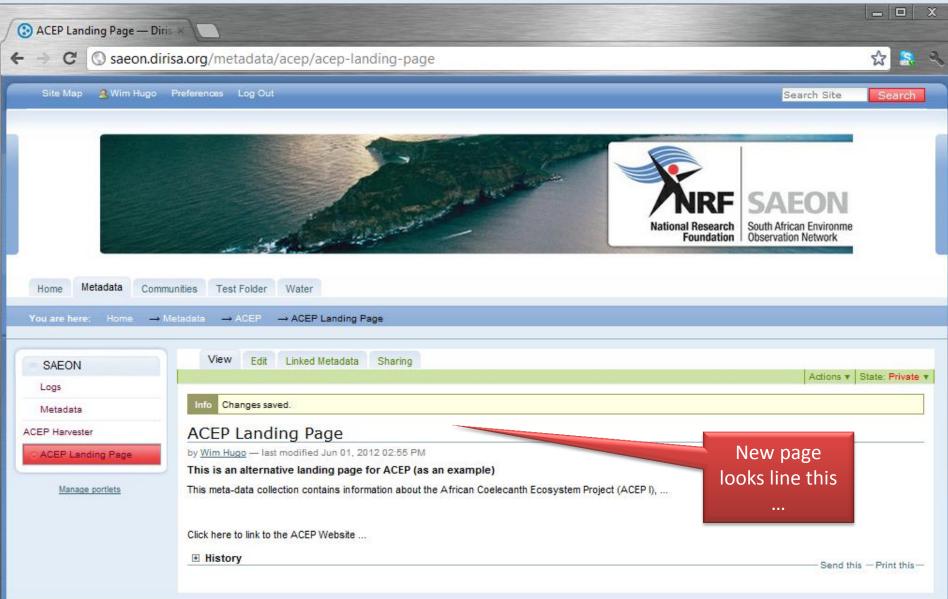 - Links to other resources

Adding a Page

Add a page at the 'Custodian' root folder

Create a Suitable Page and Save …

ACEP Landing Page — Diris

saeon.dirisa.org/metadata/acep/acep-landing-page/edit

ACEP Landing Page

Manage portlets

Default ▪ | Categorization | Dates | Ownership | Settings

Title ▪

ACEP Landing Page

Description
A short summary of the content.

This is an alternative landing page for ACEP (as an example)

Body Text

Normal paragraph | **B** | *I*

This meta-data collection contains information about the African Coelecanth Ecosyste...

Click here to link to the ACEP Website …

Edit without visual editor

Change note
Enter a comment that describes the changes you made.

Provide a Title

Provide a Description (optional)

Add as much content as required.

Plone Tutorial provides more detail

Return to the Custodian Folder

Modify the Default Display …

Modify the Default Display …

Landing Page is Different …

Test by Searching for ACEP Meta-Data

Find a relevant meta-data entry

Custodian Link in Meta-Data

Back to the Landing Page

Alternatively, Add a Window

External Window Details

External Page Linked In

Set as Default View

Select New Default View

Set a Default View for Folder

New Landing Page

Add a Useful Portlet

Select 'Manage Portlets'

Select

Select 'Static Text Portlet'

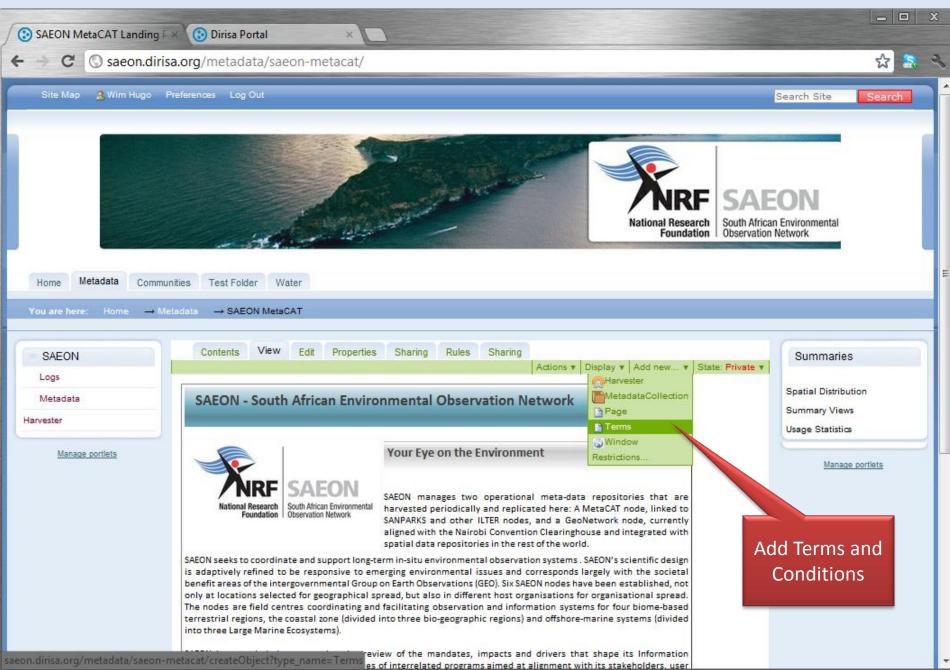# Add Portlet Content

Save Portlet Settings

Portlet has been added …

Techniques for Adding Special Content

Separate Tutorial …

Terms and Conditions

Each Custodian can have individual Ts & Cs

Edit Terms and Conditions

Special Type of Page

View Terms and Conditions