COLLABORATIVE EUROPEAN DIGITAL ARCHIVE INFRASTRUCTURE

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1. Executive summary

This report contains detailed information for users on using the CENDARI platform and feeds into the deliverable D3.1 ("Training Module Release"). It contains training materials that cover different aspects of CENDARI, from the Archival Directory to the VRE. Subjects covered in this document include accessing the NTE; working in the NTE, with detailed instructions on how to access the multiple features of the NTE, along with how to create and upload data.

**Deliverable description** (from the DOW):

These training modules will cover both the generic and specific challenges researchers will face in using the CENDARI platform. As such it will cover items such as basic access and sign-on to the portal, constructing searches, understanding and filtering search results, creating a personal research materials collection, and using the tool kit incorporated into the CENDARI interface, as well as covering issues such as the nature of the collection descriptions in CENDARI and how to find further information on less well-described collections.

2. Introduction

The aim of CENDARI is to produce a platform (the VRE, or Virtual Research Environment), which will allow scholars to access historical resources across institutional and national boundaries. CENDARI will integrate and provide access to digital archives and resources for medieval and World War One history.
The core of the VRE is the Note Taking Environment (NTE), along with the Archival Directory, and a search functionality (standard, faceted and semantic search). The NTE will allow historians, archivists and librarians to create and upload documents and take notes. In the NTE, the user can compile and comment on sources from the Archival Directory. They will also be able to submit any text, files or images to Named Entity Recognition and Disambiguation (NERD), so that the documents can be annotated semantically and connected with controlled vocabularies and ontologies, which will be integrated into the system. They can also visualise their entities and use the integrated medieval metasearch engine TRAME. The user will be able to put their compilation in order, enhance their search for archival material and share and export the project. In the NTE, the user will be able to access the Archival Research Guides (ARGs). These guides are aimed at historians who are beginning to research a certain topic and assist them in accessing suitable documentation. The Archival Research Guides are based on transnational themes, using archival collections from different countries. CENDARI will create twenty-five freely accessible guides. In addition, users will be able to annotate the existing Archival Research Guides, along with creating their own guides with the Note Taking Environment.

Finally the Archival Directory is a large database of archival collections that will be integrated onto the VRE. It is based on collections relating to CENDARI’s two case studies: the Middle Ages and World War One. The user can search and browse through the Archival Directory, which includes both well-known collections and smaller local archives that have been underused by researchers. In addition, scholars can edit and add archival descriptions to the Archival Directory.

3. Aims of training modules release

The aim of this report is to provide the future user with a primer on how the CENDARI platform currently works. It covers basic access and sign on, the Archival Directory, the
NTE and all of its associated features (NERD, faceted search, entity resolution, etc.) and the Archival Guides Give new users a primer in how CENDARI platform works. A new user can use the CENDARI platform in different ways to the benefit of their research.

4. Outline of training materials

4.1 Basic access and sign-on

You can now go to the NTE site (https://notes.cendari.dariah.eu) and look at material that other users have made publicly accessible without having to login into DARIAH first. However, if you want to access your own notes and documents (under ‘My resources’ in the left hand panel), along with any that have been shared by other users you will need to login with a DARIAH account. The login button is the second button at the top of the page. After receiving a DARIAH account please log in to the Note Taking Environment (NTE) with the DARIAH account details you have been provided with (login button in the middle at the top of the page). Only after you have logged in for the first time will other users be able to see your name in the userlist and share their projects with you. If a user has shared his project with you, you will find his name in the project list in the left column. To create archival descriptions in the Archival Directory you need to log in (button in the top line to the right) with your DARIAH details. Please use Chrome as the web browser as currently the NTE works best in this browser. Training videos were created in the course of the CENDARI project, and are available in YouTube under the name CENDARI Project: https://www.youtube.com/user/CendariProject. Available videos cover the Archival Directory, Creating a Note (under the title ‘Introduction to the NTE), and TRAME (covering Site Selection, Simple Search, Advanced Search and Shelfmark Search). Other videos are ‘Researching World War I using 21st Century Digital Tools’, ‘CENDARI Archival Research Guide - Role of Women in the First World War’, and ‘CENDARI and the Future of Research’.

D3.1 – Training Module
4.2 Creating a new project in the VRE

The Note Taking Environment consists of three columns. On the left are your resources, where you can see your notes, documents and related entities. The middle column consists of your working space. If you click on a file in the left column, it will appear in the middle column and you can either work on it (in ‘Edit mode’) or read it (in ‘Read mode’). The right-hand column has visualisations of contents of your files, such as names and places. A project is a user-named directory which can contain as many notes and documents as desired by the user, and is shareable. A Note is a platform to take notes, add links, upload text and images. The format is similar to a word processing environment. The user can also tag and resolve entities, which can be visualised on the right-hand panel. A Document is a platform to upload files (audio, text or visual) so that they can be used for reference or for transcription by the user.

Create a New Project

You can create a new project, along with creating a new note or document. To do this, click on the ‘New’ button at the top of the middle button and select ‘New’. You will then have a drop-down menu that offers you the possibility of creating a new project, note or document. You can create as many projects as you wish, and in each project, create as many notes or documents. Give your project a title (which must be different from any other user’s project) and press save (middle panel, second button). Always create a new project when working on something new as you can only make the entire project private or public, not individual documents or notes.

Making projects public
If you would like to make a project (with all its accompanying notes and documents) accessible to the public, click on the ‘pencil’ icon to the left of your name in the ‘My projects’ list on the left-hand panel. Scroll down to the bottom, past the long list of ‘editors’ and click on the box ‘Is public’. Then click on Save. You should now see your public project both under ‘My Projects’ and in ‘Public Projects’. Public projects can only been seen in ‘Read Only’ mode, unless the users have been granted editorial rights. To give another user editorial rights for your project, whether it is a public or private project, click on the pencil icon next to your name, scroll down the list of editors until you find the desired name, click on it, and select Save. That person will now be able to access your project in ‘Edit’ mode. All editors would need to have a Dariah login. You can also give your project aliases, just after the make ‘public’ box. There is a bar to write (and then save) aliases.

Create a New Note

To create a new note, click “New” in the Menu Bar and then “Note”. Write your file’s title into the field “Note’s title”. All titles have be original or else they will not be accepted. If your title has not been accepted, try to slightly modify it, as it is likely that the planned title has already been used by someone else. Write some content in the main body of the note, even if short, as notes without content cannot be saved. Click on ‘Save’ (a green bar should appear), and you can continue working. You can create a Document in the same way, and upload image, text and audio files as desired, and see these images in the Image Viewer.

Creating a table of contents

To structure your note, type the headings and elements of your note into the text. Then mark each heading one by one and choose the appropriate heading from the editor’s drop-
down menu. Keep to the correct order: heading 2 follows heading 1 and so on. Click on ‘Save’ and a table of contents will be created. You can view it in the ‘Read mode’. Go to the point in the text where you plan to insert a table. Click on the ‘Insert/Edit Table’ button (second row, far left of the editor). This will bring up a pop-up menu in which you can select how many rows and columns are needed, in which position the table should be placed (for example, to the right or left of the text). Click on ‘Insert’ to create your table. If your cursor is over the table, you can select other options from the editor (second row) such as ‘Insert row before’ or ‘Insert row after’. For borders and other options on your table, click again on the ‘Insert/ Edit Table button’ and choose the ‘Advanced’ table. In this drop-down menu you can select the border in the line ‘frame’, select the colour and then click on 'Update'. Save again and chose ‘Read mode’ and all of the selected options will be displayed.

Inserting text

You can simply type text into the editor as in any word processing programme (using the buttons in the first row of the editor). You can also copy and paste text from another text file or from a wiki. You can layout your text by marking it and choosing the layout options in the first line of the editor. If you have copied and pasted text into the editing window, you can automatically detect links in the text by clicking on the big red button in the top row of the editor (called ‘markcreativework.desc’). You can also insert links manually by selecting a section of text, and then clicking on the ‘chain’ button in the editing menu (called ‘Insert/Edit Link’).

Insert Footnotes/References

Go to the end of your text. If there is no reference section there, create it first by marking it as you did when creating headings. Click on the button with an anchor and provide a name
of the anchor. Make sure that this is either one word, words with no spaces in between, or words with hyphens or underscores. Click ‘Insert’. Then go to the section in the text which you wish to link to the footnote. Put the number of the footnote in brackets (i.e. [1]), highlight the number and then click on the chain symbol (‘Insert/Edit Link’). Select the named anchor from the ‘Anchors’ drop-down menu. Click ‘Insert’ and then ‘Save’. In the Read mode the link will work. You can do the same vice versa so that the readers will be taken back to the point in the text from the reference.

**Version History**

If you are in ‘Edit’ mode in either one of your own notes or one for which you have been granted editorial status, you can see all of the previous versions of the text, with an indication of date and time of their creation. Click on ‘Version History’, the third button at the top of the middle panel. You can also choose to replace current text with an earlier version if desired.

**Exporting text**

On the far right of the middle panel is a button called ‘Export rdfa’. First make sure you are in ‘Read’ mode (see the top bar in the middle panel, which should tell you if you are in ‘Read’ or ‘Edit’ mode). Then click on the ‘Export rdfa’ button. This will export the document in xml mode.

**HTML**
If you have experience with editing in HTML Source Code, you can click on the ‘html’ button in the first row of the editor. In the pop-up window you can edit code and save it with ‘Update’.

**Reporting issues**

If something does not work or if the system crashes, you can click on the button “Issue report” on the very top of the page.

**Saving work**

Please save all of your work and log yourself out after finishing a session. It is a good idea to regularly save work in the NTE.

**Searching**

You can do a faceted search by entering text in the search bar at the top of the page. By default this search covers the whole NTE database. There is a check box underneath the 'include TRAME' checkbox, called 'Search Current Project’ for limiting the search to the current project. You can choose different facets (found on the left hand-side) to refine your search results, such as date, location, format, language, organisation, person, place, publisher, reference, tag, project, format, event, creator, contributor, artefact and application.

**TRAME**
TRAME is an acronym for Text and Manuscript Transmission of the Middle Ages in Europe. It is a metasearch tool for medieval manuscripts, hosted by the Fondazione Ezio Franceschini and SISMEL. Its main aim is to build a research infrastructure that focuses on promoting interoperability and fostering discoverability among the different digital resources available in the medieval digital ecosystem. Currently it implements a number of features (including simple search, shelf-mark search, and advanced search) on more than 80 selected scholarly digital resources devoted to western medieval manuscripts, authors, and texts across the EU and USA. These resources include digital libraries, research databases and other projects from leading research institutions. TRAME allows the user to search simultaneously in library catalogues, project databases and research portals. It combines online resources that are inside the TRAME network as well as external sites. The infrastructure combines bibliographies on manuscripts, repositories of texts and manuscripts, repositories on the history of traditions, bio-bibliographies, and library catalogues and digital library collections.

Tagging of entities

Highlight the entity you want to add to your resource. Then right-click with your mouse and choose from the context menu the appropriate entity, which can be a person’s name, a place, an event or an organisation. Then click on ‘Save’. Your entity will be listed in the ‘entities section on the left column, and will be shown in the column on a right. You can also view the entity by clicking on the ‘entities’ tab in your working space (top left-hand side). Tagging entities allows them to be 'recognized' by the system and linked to the available database. You can add an explanatory description to your entity if you right-click with your mouse, as a drop-down menu will appear, offering different options (for example ‘son of’).

Manually resolving of entities
If you want your entities to be resolved, right-click the entity with your mouse and choose from the context menu the appropriate entity, as mentioned above. Then ‘Save’. To resolve it, you can either click on the tab ‘Entities’ in your working space section or choose the ‘Entities’ section in the left column. After selected and clicking on the entity, you have a ‘Resolve field’ option. In this field you need to provide a link. Open a new tab in your Chrome browser and search for the entity you are looking for in dbpedia. If the entity you are looking for is simple – for example ‘Paris’ –, the easiest way is to guess the page’s URL by typing it after http://dbpedia.org/page/ (i.e. http://dbpedia.org/page/Paris). Click on the Enter bar of your keyboard, and press ‘Save’. The resolved entity will then be shown on a map to your right. If the desired entity is a complex entity (for example a transcribed name), the easiest solution is to go to the corresponding Wikipedia page (i.e. http://en.wikipedia.org/wiki/Leon_Trotsky), choose the correct entry and then copy and paste the link into the field ‘Resolve’ in the NTE. Afterwards replace the beginning of the link ‘http:// en.wikipedia.org/wiki’ with ‘http://dbpedia.org/ resource/’ and click on “Save”. In the right-hand column the number of all related documents and notes will be shown, and you see these documents by clicking on the tabs in the middle of your working space (‘Related notes’, ‘Related documents’, ‘Related entities’).

**Resolving events automatically**

When an event is resolved automatically, the date is found in the NTE database (dpedia) automatically. To do this, press the button that is next to the date at the main entity page, and it will look for possible dates in the database. To automatically resolve an event entity, you need to first create an event entity from a document or a note by tagging, i.e. highlighting and right-clicking on the event. Open the event you created, (e.g. the battle of Wilkomierz) from the resources tree. In the 'Resolve' field, type the first few letters of the event and pick a suitable results from the suggested list. Press Save. The NTE will try to
fetch the date automatically from dbpedia. If a date exists and if its format is processable, then the entity will be resolved and its date assigned to the timeline. For example, try typing 'battle of' and pick 'battle of Wilkomierz' with the url: http://dbpedia.org/resource/Battle_of_Wilkomierz. The date 09/01/1435 is automatically assigned to this event. If there is no available date from dbpedia or the retrieved format is not in a recognisable format, a warning message is issued.

NERD

NERD stands for Named Entity Recognition and Disambiguation. It has also been recently added to the NTE. The button for the NERD service can be found on the toolbar of the editor, and looks like a smiley face. Press this button. The service will process the text and find possible entities in the text. If an entity is recognized that has already identified by the user as different type, the recognized type will be ignored. For example if Paris is being identified as Person but NERD recognises it as a Place then Paris will remain a Person. If a user has added extra attributes to an entity (e.g. a dbpedia url) and the NERD recognizes this entity with the same type then the attributes will be copied to the other instances of the entity inside the text. For example if a user has tagged Paris as place and added a dbpedia url, and there are other instances of Paris in the text, then the Nerd will tag them automatically as a place and copy the dbpedia url.

Entity deletion

When a tagged entity is removed from the content of a note or a document and if it does not exist in another note/document then it will be deleted automatically. That means that the entity is not visible in the resources tree and it should not be found in the faceted search results.
Entity aliases

Aliases are the different "names" for the same entities. For example, the person “Lawrence of Arabia”, “T.E. Lawrence” and “Thomas Edward Lawrence”. Similarly the event the “First World War”, “Great War” and “World War One”. Another example would be different spellings for the same place name in different languages and scripts, such as “Vilnius”, “Вилен”, “Вільнюс” or “וְיִלְנָע”. So that the system knows that these different names point to the same entity, users can group them into a cluster. This can be done in two ways. First, after having marked up these as entities in a note or document as an entity, go to the list of resources in the left panel, and open the appropriate entity. Then resolve all of the entities by giving them the same dbpedia URL. For the T.E. Lawrence example, all three entities should be resolved with the URL http://dbpedia.org/resource/T._E._Lawrence. Entities with the same dbpedia URL will be automatically merged into an alias cluster. The second possible option for giving aliases to all entities involves resolving only one of the entities with the appropriate URL. After doing this, click on “Save” and then click on the link “Create a new cluster containing this topic” which should be in the middle panel under the URL’s field. Please note that you have to enable pop-up windows in your browser to access this page. A new page will open with the entity for which you want to create a cluster on top, followed by a list of all the other entities below. In order to select all the entities which should be grouped in the cluster (for example “Vilnius”, “Вилен”, etc.), you have to tick the boxes in front of these entities. Remember to click “Save” afterwards. Both operations will result in the clustering of all related entities in a folder in the list of resources in the left-hand panel. You can edit clusters there if desired. Access the edit page of a cluster by opening one of the entity pages of the cluster and click on the cluster name link in the middle panel, which is just below the field for the URL. Subsequently after opening the
page, you can edit the name of the cluster or add and remove entities from the cluster. Do not forget to save the changes after selecting the boxes.

4.3 Archival Directory AtoM

The Archival Directory includes both manually encoded archival descriptions and collections along with archival references that have been uploaded automatically. It is focused on medieval and World War One collections. Users with a DARIAH account can add and edit archival descriptions and collections.

For an overview of the Archival Directory, the software utilised (AtoM: Access to Memory) and the methodology used in compiling its entries, please see the Archival Research Guide Methodological Guide to Sources in AtoM:

https://notes.cendari.dariah.eu/cendari/ARG_Sources_in_AtoM/notes/774/

The Archival Directory has a strong transnational focus, and one of its aims is include many archives and institution, which are little known or rarely used by researchers. The Archival Directory allows the historian to view sources in a rarely seen transnational and comparative view. Following the CENDARI project itself, the Archival Directory is focused on archives and libraries containing documentation for historical research on the Middle Ages and World War One. Users can also create and edit archival descriptions as they use the Archival Directory in the course of their research.

The Archival Directory was created using AtoM (Access to Memory: https://www.accesstomemory.org/en/). AtoM is a free web-based open source application that can be used to create a multilingual multi-repository interface and database for archival descriptions. All elements of AtoM can be translated into multiple languages (using
Compliance with archival standards is standard in AtoM, and there are web-based templates that conform to many international and national archival standards. AtoM can be used by one institution just for their archival descriptions or as a repository accepting archival descriptions from any number of institutions.

You can search (black bar at top, near the middle) for archival descriptions or browse (top-left). There is also a listing of entries recently searched by other users (‘popular this week’). You can browse by the following: Archival descriptions, Archival Institutions, Subjects and Places.

The results of an Archival descriptions search can be narrowed by language, archival institution, creator, name, place, subject, level of description and media type. Browsing by archival institutions. You can adjust these results by 'language', 'archive type', 'geographic region', 'geographic subregion', 'locality' and 'thematic area'.

### 4.4 Archival Research Guides

An Archival Research Guide is an introductory guide to archival material, structured around either one or many archival collections. Their main targets are early career researchers or historians who are starting new research projects. However they will also be of interest to librarians, archivists, and scholars. Traditional archival guides have usually limited their focus to one collection, institution or country. For example Australia’s Copyright Records, 1854-1968 (2003) (http://guides.naa.gov.au/content/20141219-Guide018_tcm48-54596.pdf) presented only material in the National Archives of Australia. In CENDARI, Archival Research Guides are created in the NTE (Note Taking Environment). They present selected research topics on the World War One and medieval eras. The CENDARI Archival Research Guides cover select transnational historiographical topics. Topics were chosen by CENDARI researchers according to their own relevant expertise.
Apart from providing a thematic introduction to collections in a transnational, comparative and multilingual framework, they enable digital access to archival holdings and multimedia content extant in the Archival Directory (https://archives.cendari.dariah.eu/index.php/) as well as collections not in the Directory itself. Thus users will be able to research transnational themes and access dispersed and ‘hidden’ collections. They will promote collaboration among researchers and enable the integration of digital and collaborative writing tools in traditional historiographic practice.

Users will be able to annotate, generate text, and create links to other archival collections. In addition, they will be able to create their own Archival Research Guides in the Note Taking Environment (NTE). The subjects in the Archival Research Guides aim to follow the strong transnational, comparative, and multilingual aims of the CENDARI project. The guides aim to present primary sources from different geographic areas and countries, include both archival and library resources and, when possible, present primary sources in a variety of languages (when possible). This multilingual aspect will showcase one of the strengths of the CENDARI project: the use of semantic technologies (such as entity extraction and Named Entity Recognition) which will help researchers link names, places and dates with controlled entities and ontologies. In the Note Taking Environment there are contextualization tools such as maps and visualization tools to assist in analysis. You can see examples of the visualisation process of Named Entities in the ARGs on the right-hand side of the screen.

**Structure of an Archival Research Guide**

The CENDARI Archival Research Guides have the following structure
I. Title, Authors, Abstract, Introduction: This section introduces the topic, and places it within the current historiographical framework, and often explains the methodology used in the creation of the ARG

II. Primary Sources: This section lists relevant collections and records available in archives, museums and libraries, organised by country

III. Secondary sources: This section lists all relevant historiography on the subject

IV. Additional sources: This section lists material that does not fall into the two categories mentioned above

Note: Not all ARGs in CENDARI have this exact structure due to different content. This can be a guide for users creating their own ARGs but naturally.

For further details on ARGs and how they were structured, see the document TUG Training Material Archival Research Guides, available on Basecamp. In a recent video, Dr Francesca Morselli (Trinity College Dublin) explains how she created her Archival Research Guide ‘The Role of Women in World War One’ and how Archival Research Guides can assist historians: https://youtu.be/ejVZM4GYbys

Accessing the ARGs

All of the Archive Research Guides created by CENDARI researchers for the project are now available as public projects, and can be accessed by anyone without the need to login into the NTE. Just go to the site https://notes.cendari.dariah.eu/ and you will see them listed under ‘Public Projects’. You will be able to access them in the ‘Read Only’ mode. To make any changes to an ARG, as with anyone else’s project, you would need to be logged in with a DARIAH account and the user would have to share the project with you. You can also access
the ARGs via the website, using the link http://www.cendari.eu/archival-research-guides/. This page lists all of the ARGs, with links to the NTE.

Copyright in existing Archival Research Guides and further contributions by users

The license applied to the content in the Archival Research Guides is the CC-BY Creative Commons attribution - http://creativecommons.org/licenses/by/4.0/ following general rules of scholarly attribution practices. This means that the existing content of Archival Research Guides and all content that users add will be applied the CC-BY Creative Commons License.

Why would you use an Archival Research Guide?

As a scholar, you will be able to browse the existing guides. The guides will present a large selection of primary sources on the subject, along with a wide selection of secondary sources to assist you in understanding the current historiography of the subject. Thus the ARGs will facilitate the retrieval of archival resources. You will also be able to see which users have linked their projects to a specific guide, which might assist you in finding fellow scholars in the field, and discover what current research is being undertaken in relation to that subject. Strengthening the use of ‘unknown’ or little used collections is a core aim of the CENDARI project. Any DARIAH user can access and edit text on the ARGs, although their contributions will have to be approved before being published and visible to the public. The CENDARI Archival Guides have authors and their content and the chosen historiographical approach is based on the author’s scholarly expertise. Users can agree or disagree with this approach as the ARGs, like all academic publications, are not intended to be set in stone. The authors of the CENDARI ARGs used different methodologies in their creation: some focus on dispersed historical resources, others on the description of available resources for
a chosen topic, and others on historiographical themes or a narrative approach. The ability for users to link their projects to an Archival Research Guide will create research communities, as users can compare notes and agree to collaborate. Apart from scholars linking projects to existing guides, these communities can take shape during the creation of new guides thanks to the collaboration of multiple authors. Scholars will also be able to add archival holdings and relevant materials to each Archival Research Guide, along with upgrading content according to their speciality. Another purpose of the Archival Research Guides will be as a teaching tool for undergraduates. A lecturer can present the Archival Research Guides as both a tool to find digitised archival resources and as a platform for collaborative work on a historiographical subject. Students can share resources (referencing them to the relevant archive or library), comment and contextualise the archival resources found on both the Internet and in the CENDARI Archival Directory.

Finally, apart from contributing to the already existing guides, you will be able to create your Archival Research Guide. This will help scholars organise and share text and archival collections on their chosen subject of research, along with finding relevant archival collections from other researchers’ guides. There are no restrictions on the use of Archival Research Guides, so users can discover new and creative ways to enhance their research.

5. Appendix: List of CENDARI Archival Research Guides

Here is a list of all of the ARGs available on CENDARI, with their authors’ names. There are two categories: World War One and the Middle Ages.

(WWI 1) Jakub Benes / Workers’ Movements
(WWI 2) Alexandra Pawliczek / Parallel Records
(WWI 3) Alexandra Pawliczek / National Narratives
(WWI 4) Andrei Zamoiski / Jews of Eastern Europe
(WWI 5) Anna Bohn / Romanov Dynasty
(WWI 6) Francesca Morselli / Private Memories
(WWI 7) Pavlina Bobic / Coercion and Consent
(WWI 8) Andrei Zamoiski / Islamic Movements
(WWI 9) Francesca Morselli / Industrial Development
(WWI 10) Jakub Benes / East Central European States
(WWI 11) Pavlina Bobic / Prisoners of War
(WWI 12) Pavlina Bobic / Injury and Disease
(WWI 13) Andrei Zamoiski / Emerging States
(WWI 14) Francesca Morselli / Women during WW1
(WWI 15) Jörg Lehmann / Science and Technology
(WWI 16) Kathleen Walker-Meikle / Methodological Guide on AtoM Sources
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