

# Information Management Resource Kit

## GETTING STARTED TUTORIAL

### NOTE

Please note that this PDF version does not have the interactive features offered through the IMARK courseware.

We recommend that you take the tutorial using the interactive courseware environment, and use the PDF version for printing the tutorial and to use as a reference after you have completed the course.



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## Introduction

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### Why should you read this tutorial?

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Thanks for taking the Getting Started tutorial.

The Getting Started tutorial will show you how to start using the module and how to make the most of your learning experience, by describing the many features available.



### What this tutorial is about?

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The tutorial will show you how to customize the course to meet your specific learning needs and allow you to keep track of which lessons you have completed, and where you are in the module.

The tutorial describes a typical lesson so that you become familiar with how the lessons are structured, and what is required of you. All menu items, icons and navigation tools are identified and their features explained.

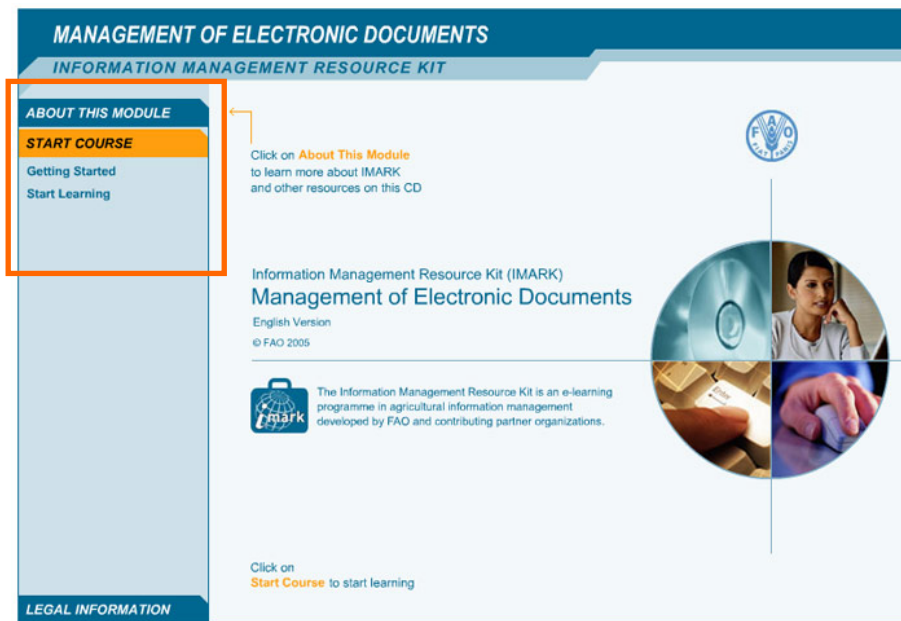
The navigation guides at the lower-right of each screen will help you navigate through the tutorial.

Happy learning!

## Starting the Module

### Learning more About this Module

Before starting the course, we would advise you to visit the About this Module section to learn about the Information Management Resource Kit (IMARK) and the lessons and resources provided in this Module.



### Start Learning

Click on Start Learning from the Start Course section in order to start the course.



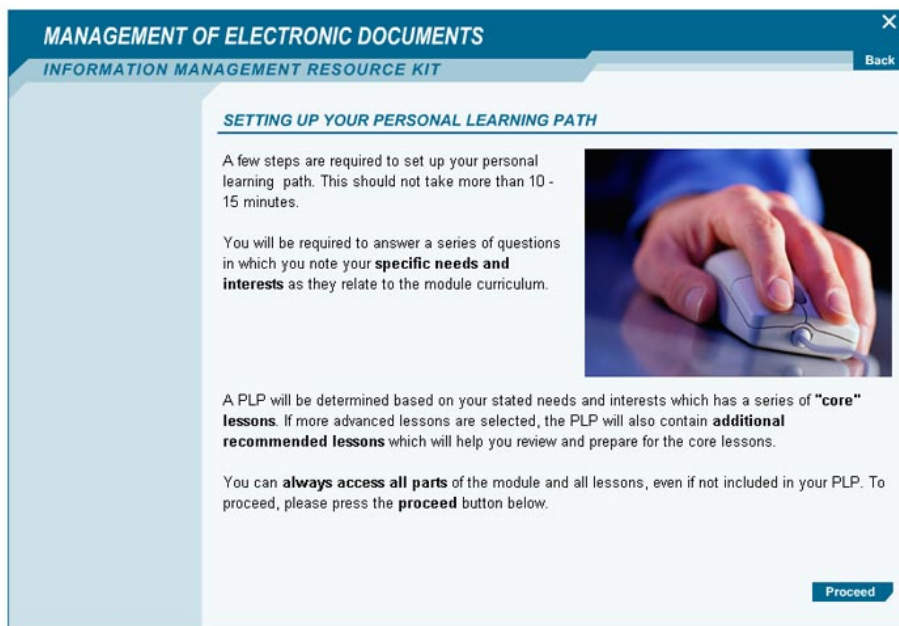
## Personal Learning Path (PLP)

### What is a Personal Learning Path?

Lessons in the module can be combined to form a curriculum tailored to your specific interests or need training. You can do it by developing your own Personal Learning Path (PLP).

### Setting up your PLP

You can set up your PLP before starting the course, or develop it at any time by selecting Personal Learning Path from the left-hand menu.



**MANAGEMENT OF ELECTRONIC DOCUMENTS**

INFORMATION MANAGEMENT RESOURCE KIT

**SETTING UP YOUR PERSONAL LEARNING PATH**

A few steps are required to set up your personal learning path. This should not take more than 10 - 15 minutes.

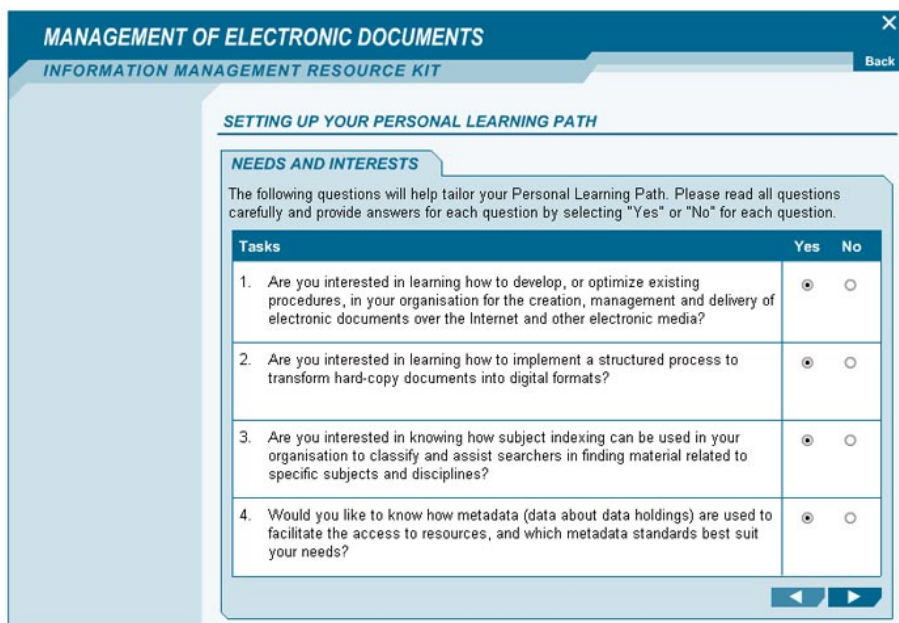
You will be required to answer a series of questions in which you note your **specific needs and interests** as they relate to the module curriculum.

A PLP will be determined based on your stated needs and interests which has a series of **"core" lessons**. If more advanced lessons are selected, the PLP will also contain **additional recommended lessons** which will help you review and prepare for the core lessons.

You can **always access all parts** of the module and all lessons, even if not included in your PLP. To proceed, please press the **proceed** button below.

Proceed

To set up your personal learning path (PLP), you are required to answer a few questions about your learning interests and skills.



**MANAGEMENT OF ELECTRONIC DOCUMENTS**

INFORMATION MANAGEMENT RESOURCE KIT

**SETTING UP YOUR PERSONAL LEARNING PATH**

**NEEDS AND INTERESTS**

The following questions will help tailor your Personal Learning Path. Please read all questions carefully and provide answers for each question by selecting "Yes" or "No" for each question.

Tasks	Yes	No
1. Are you interested in learning how to develop, or optimize existing procedures, in your organisation for the creation, management and delivery of electronic documents over the Internet and other electronic media?	<input checked="" type="radio"/>	<input type="radio"/>
2. Are you interested in learning how to implement a structured process to transform hard-copy documents into digital formats?	<input checked="" type="radio"/>	<input type="radio"/>
3. Are you interested in knowing how subject indexing can be used in your organisation to classify and assist searchers in finding material related to specific subjects and disciplines?	<input checked="" type="radio"/>	<input type="radio"/>
4. Would you like to know how metadata (data about data holdings) are used to facilitate the access to resources, and which metadata standards best suit your needs?	<input checked="" type="radio"/>	<input type="radio"/>

Your PLP will contain a series of core and recommended lessons.

You can select a lesson and click on the GO button to directly start a lesson. You can select the Start course button to go to the Course Menu.

**MANAGEMENT OF ELECTRONIC DOCUMENTS**  
INFORMATION MANAGEMENT RESOURCE KIT

Course Menu | Start Course

**ABOUT THIS MODULE**

- Overview
- Structure and Workload
- Course Description
- Special Features
- Contributing Organizations
- Authors

**PERSONAL LEARNING PATH**

Unit 1	Unit 2	Unit 3	Unit 4	Unit 5	Unit 6
Lesson 1.1	Lesson 2.1	Lesson 3.1	Lesson 4.1	Lesson 5.1	Lesson 6.1
	Lesson 2.2	Lesson 3.2	Lesson 4.2	Lesson 5.2	Lesson 6.2
	Lesson 2.3	Lesson 3.3	Lesson 4.3	Lesson 5.3	Lesson 6.3
	Lesson 2.4	Lesson 3.4		Lesson 5.4	Lesson 6.4
	Lesson 2.5	Lesson 3.5		Lesson 5.5	
	Lesson 2.6			Lesson 5.6	
	Lesson 2.7				
	Lesson 2.8				

core
  recommended
 ✓ completed

[PLP Listing](#) [Redefine PLP](#)

**DETAILS** PLP

**Unit:** 1. Overview

**Lesson:** 1.1 Opportunities, challenges and roles

**Recommended lessons:** -

Click on the **GO** button to go this lesson.

**GO**

## Course Menu

### What is the course menu for?

The Course Menu provides a listing of the units and lessons in the module.

The screenshot shows the 'COURSE MENU' for the 'MANAGEMENT OF ELECTRONIC DOCUMENTS' module. The interface is divided into several sections:

- Header:** 'MANAGEMENT OF ELECTRONIC DOCUMENTS' and 'INFORMATION MANAGEMENT RESOURCE KIT'. A 'Back to Lesson' button is in the top right.
- Left Sidebar:** 'ABOUT THIS MODULE' (Overview, Structure and Workload, Course Description, Special Features, Contributing Organizations, Authors) and 'MY COURSE' (SEARCH, RESOURCES, HELP & SUPPORT, LEGAL INFORMATION).
- Units Section:** A list of six units: 1. Overview, 2. Formats for electronic documents and images, 3. Metadata standards and subject indexing, 4. Production and management of electronic documents, 5. Database management systems, 6. Networking documents and databases.
- Lessons Section:** A list of lessons, with '1.1 Opportunities, challenges and roles' highlighted. It includes 'GO' and 'PLP' buttons.
- Right Panel:** Instructions: 'Select a Unit to see the list of its Lessons.' and 'Click on the "GO" button to start the lesson.' A legend defines 'PLP core lesson' (orange box), 'PLP recommended lesson' (yellow box), and 'lesson completed' (checkmark icon). A 'List' button is at the bottom.

You can see which lessons are included in your personal learning path (PLP), and which lessons you have completed.

To take a lesson:

- select a unit; then
- click on the GO button on the right of the lesson you wish to take.

## General screen layout

### Screen Areas

The screen layout consists of three main areas as follows:

#### Course Navigation Bar

This area contains the tabs required to move through a lesson, and to access the Course Menu and Glossary. This area also indicates where you are in the course.

The screenshot displays the course interface for "MANAGEMENT OF ELECTRONIC DOCUMENTS". At the top, the Course Navigation Bar shows the current lesson: "4. Production and management of electronic documents" and "4.1 Digitizing printed documents: Options and choices". Below this, the interface is divided into three main sections:

- Left-hand menu:** A vertical sidebar on the left containing links for "ABOUT THIS MODULE" (Overview, Structure and Workload, Course Description, Special Features, Contributing Organizations, Authors), "MY COURSE", "SEARCH", "RESOURCES", "HELP & SUPPORT", and "LEGAL INFORMATION".
- Lesson screen:** The main content area titled "OBJECTIVES" for "Lesson 4.1 Digitizing printed documents: Options and choices". It lists learning objectives: "At the end of this lesson, you will be able to: understand whether you should convert hardcopy documents to electronic documents; select the documents to scan; and assess the resources required for the scanning process." A link for "pdf version of this lesson" is provided at the bottom left of the lesson content. To the right of the text is an image of a bookshelf filled with books.

#### Left-hand menu

It provides access to useful information about the module, where to get support, and how access to the resources available on this CD and on the Internet.

#### Lesson screen

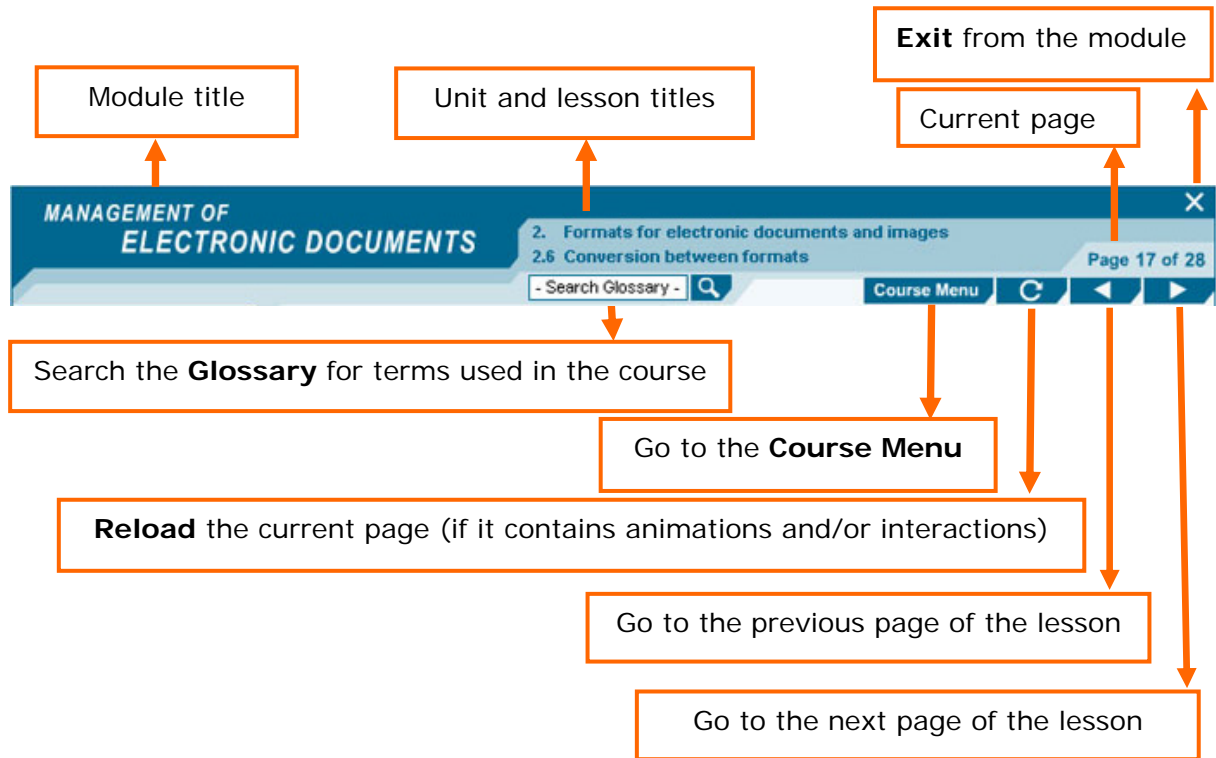
This screen contains the lesson content and exercises.



## Course Navigation Bar

What is the Course Navigation bar for?

### Location: where I am?



### Navigation: where can I go?

## Left-hand menu

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### What does the left-hand menu contain?

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Following functions are available by clicking on the left-hand menu options.

Option	Sub Menus	Description
<b>About this Module</b>	<b>ABOUT THIS MODULE</b> Overview Structure and Workload Course Description Special Features Contributing Organizations Authors	This sections provides an overview and general information about the module, including a description of the course contents.
<b>My Course</b>	<b>MY COURSE</b> Personal Learning Path My Progress	<p>This section contains information about your Personal Learning Path, your progress and status as a learner.</p> <p>You can view and redefine your Personal Learning Path at any time.</p> <p>From the My Progress section, you can view your progress in the module.</p>
<b>Search</b>	<b>SEARCH</b> Search Course Glossary	Search tools for searching within the course and glossary.
<b>Resources</b>	<b>RESOURCES</b> Tutorials & Guides Software & Tools Online Resources Additional Reading Lessons in PDF	This section provides rapid access to a wide range of resources including tutorials, software, online and offline resources, tools for accessing online information, and Resource Kit specific resources.

Option	Sub Menus	Description
<b>Help and support</b>	<p><b>HELP &amp; SUPPORT</b></p> <ul style="list-style-type: none"> <li>Getting Started</li> <li>FAQs</li> <li>Online Community</li> <li>E-mail Us</li> <li>Evaluate this Module</li> </ul>	<p>This section provides a list of FAQs for this module. This tutorial is also available as a quick reference.</p> <p>You can also contact us by e-mail for help or you can help us by evaluating this module</p>
<b>Legal Information</b>	<p><b>LEGAL INFORMATION</b></p> <ul style="list-style-type: none"> <li>User Agreement</li> <li>Trademarks</li> <li>Photo and Image Credits</li> </ul>	<p>This section contains the User Agreement which states the legal terms and conditions for use this module. A statement concerning the use of trademarks and the credits for the images used in this module are also included.</p>

## Lesson structure

### What does a lesson contain?

Following is a short description of a typical lesson.

### Learning objectives screen

The first screen contains the learning objectives for the lesson:

The screenshot shows a web-based learning interface. The title bar reads 'MANAGEMENT OF ELECTRONIC DOCUMENTS' and '2. Formats for electronic documents and images'. The current page is '2.6 Conversion between formats', which is 'Page 1 of 28'. A search bar and navigation buttons are visible. The main content area is titled 'OBJECTIVES' and features a yellow box for 'Lesson 2.6 Conversion between formats'. Below this, it states: 'At the end of this lesson, you will be able to:' followed by a bulleted list:

- choose among **different electronic formats**;
- understand the **process involved in document conversion** from one format to another;
- know the different ways of **converting documents** from: Word (doc) to HTML/PDF, Word (doc) to XML, and XML to HTML/PDF.

There is a link for a 'pdf version of this lesson' and an image of a hand typing on a keyboard with a double-headed arrow overlaid.

### Lesson core

The core of the lesson is a set of screens composed of text, illustrations, interactive exercises, and links to resources:

The screenshot shows the 'CONVERSION FROM WORD TO XML' screen. It includes a navigation sidebar on the left and a main content area. The main content area features a diagram and text. The diagram shows a flow: 'MS Word Document (source)' points to 'Transformation Process', which points to 'XML Source'. A box labeled 'Transformation Rules' has an arrow pointing up to the 'Transformation Process' box. The text explains that there are tools available to help with the transformation, but users must use styles and templates correctly. It also mentions that some organizations have a team to manually correct source documents before or after transformation.

There are a number of tools available on the market which can **plug in to Word** to help make the transformation to XML. They generally use Word styles to make the transformation and rely on users of the word processor applying word styles in a consistent manner.

In this case it is necessary that users have created Word documents **using styles and templates correctly**. If not, it is quite difficult to make a fully automated transformation from Word to XML.

Some organizations solve this problem by having a small team of people (the production or technical editorial team) who make manual corrections to the source Word documents before transformation and/or to the target XML documents after transformation.

## Summary

At the end of the lesson you will find a summary of the key-concepts, and ...

## Exercises

...a series of self-evaluation exercises.

## Recommended Resources

Finally, each lesson can have a set of recommended resources.

The screenshot shows a course page with a blue header and a sidebar. The main content area is titled 'RECOMMENDED RESOURCES (2 OF 4)'. It features a text box with the following content:

**CAB Thesaurus - The Thesaurus for the Applied Life Sciences**  
 Copyright CAB International (<http://www.cabi.org/>)

The CAB Thesaurus is a thesaurus of the applied life sciences. It is the world's largest thesaurus for agricultural sciences and related subjects. The CAB Thesaurus has strong coverage of terms used in agriculture, horticulture, crop protection, forestry, soil science, animal production, veterinary medicine, human nutrition, and rural studies, as well as in entomology, parasitology and mycology. It also covers terminology in applied microbiology, biotechnology, international health and tropical medicine, food security, socioeconomics, leisure and tourism, natural resources management, and sustainable development. Users can search the CAB Thesaurus via CABI's website at: <http://www.cabthesaurus.info>.

To the right of the text is a photograph of a computer monitor and keyboard.

## Online Resources

...as well as a list of online resources and additional reading.

The screenshot shows a course page with a blue header and a sidebar. The main content area is titled 'IF YOU WANT TO KNOW MORE...'. It features a section titled 'Online Resources:' with the following content:

OpenOffice.org - OpenOffice is an open source (free) suite of software available in various languages which includes a word processor, spreadsheet, presentation and drawing software with PDF capabilities: (<http://www.openoffice.org>)

World Wide Web Consortium Open information standards for the Web: (<http://www.w3.org>)

RenderX, vendors of the XEP XSL-FO processor, also have links to other XSL-FO resources: (<http://www.renderx.com>)

Perl, pattern matching language often used for conversion is available as open source: (<http://www.perl.org>)

Openly available document converters, filters and tools: (<http://www.w3.org/Tools/Filters.html>)

PDFzone.com, the online authority for PDF, Adobe Acrobat and related document technologies: (<http://www.pdfzone.com/>)





At the top of the main content area, there is a banner image with various icons representing digital technology and documents.

## Icons

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What are the icon functions?

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Name	Symbol	Function
<b>Information icon</b>		Open a <b>popup window</b> on the screen containing additional information on the current subject. You can drag the popup on the screen and close it by clicking on the close option (  ).
<b>Document Icon</b>		Open a <b>PDF</b> or a <b>Microsoft Word document</b> in a separate window. This can be printed. You can close or minimize the window and return to the current screen of the lesson.
<b>Web Icon</b>		Visit an <b>external Website</b> . The icon opens an Internet browser directed to a specific website. You can close or minimize the window and return to the current screen of the lesson. Links can also be shown as follows: <a href="http://www.fao.org">www.fao.org</a>

## Thanks for taking this tutorial

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You can view the interactive version of this tutorial on the IMARK courseware.

You can view the whole tutorial, or specific parts of the tutorial anytime by selecting "Getting Started" under Help & Support in the Left-hand menu. If you would like to take the tutorial again right away just click on "view tutorial". If not just click "exit".

