



**MUSEUMS LIBRARIES ARCHIVES
PARTNERSHIP**

London Museums Hub

Records Management e-learning tool

Installation and customisation guide

March 2008

1 Contents

1	<u>Contents</u>	ii
2	<u>Introduction</u>	1
3	<u>CD contents</u>	2
4	<u>System requirements</u>	2
5	<u>Installation</u>	3
5.1	Installation on a web server	3
5.2	Installation on an individual computer.....	3
5.2.1	Windows PC – default folder	3
5.2.2	Windows PC – other folder.....	3
5.2.3	Non-Windows computer	3
5.3	Installation on a shared network drive	4
5.4	Run from CD-ROM	4
6	<u>Customisation</u>	4
6.1	Museum logo.....	4
6.1.1	Adding your logo	4
6.1.2	Positioning your logo	5
6.1.3	Other image formats.....	5
6.1.4	Adding alternative text.....	5
6.2	Body of the text.....	6
6.2.1	Editing guidelines	6
6.2.2	Editable regions.....	9
7	<u>Tips</u>	15
7.1	Printing	15
7.2	Internet Explorer	15
8	<u>Release notes</u>	16
9	<u>Support</u>	17

2 Introduction

This e-learning tool on records management for museums was developed as part of the Hub Records Project, funded by the MLA's Renaissance Programme for the London Museums Hub (Museum of London (lead partner), Geffrye Museum, Horniman Museum and the London Transport Museum), and is freely available to all museums in the London region and across other regions as we roll it out over 2008.

The aim of the tool is to raise awareness of records management so that museums can be more effective, comply more easily with legislation such as FOI and see their records as part of their own documentary heritage and as a corporate asset. We anticipate that the tool will be used as part of museum induction programmes and for refresher training for existing staff, delivered via museum intranets and/or as a stand alone tool. It comprises five sections that should take no longer than 20 minutes to complete.

The tool guides users through a practical summary of basic records management concepts with museum context examples; introduces the idea of information and records as corporate assets to the museum; reviews records management tools commonly used (e.g. file plans, retention schedules); and provides an overview of related legislation such as Freedom of Information and Data Protection Acts; with an interactive quiz at the end of each section.

It is a cross-platform HTML application that can be networked via servers or used on stand alone computers on CD or USB drive. The project will provide the tool free of charge on CD to all London region museums, and will also ensure that the tool is available for wider download via a number of websites, including MDA's Collections Link at:

<http://www.collectionslink.org.uk/RM-Tool/>

The Hub Records Project 2007-2008 aimed to assess and evaluate current business records management practices (including related links to object collections records) and develop a strategy for improvements across the Hub museums. There was also a significant training component of the project that comprised both in-house and external offerings both within the London region and across the other Hubs. We are very pleased to announce that the project has been extended to March 2009 so that the recommendations in the strategic report can be implemented.

The Records Management e-learning tool has been created so that it should not require any specific client or server technology. Therefore it can be installed on web servers (internet, intranet or extranet), individual computers, or shared network drives, and can also be run directly from the CD-ROM.

To achieve this, the tool runs in a standard web browser – and has been designed to work in as many web browsers as possible, and to be as accessible as possible.

3 CD contents

Folder	Contents
--------	----------

/	This document, plus files for making the CD run automatically
/Installer	Installer for an individual Windows PC (see Windows PC below)
/RM Tool	The files for the Records Management e-learning tool itself – for use when installing the tool on a web server, an individual computer or a shared network drive, or when running the tool directly from the CD-ROM (see Installation below)

4 System requirements

The tool runs in a standard web browser, so the user environment can be virtually any environment that supports a web browser. A web browser must be installed on systems from which users wish to access the tool. A recent version of a popular browser is recommended (for example, Microsoft Internet Explorer 7 or Mozilla Firefox 2) with support for the following:

- The Document Object Model (DOM)
The Document Object Model is a mechanism that allows scripts to dynamically access and update the content, structure and style of web pages.
- JavaScript
JavaScript is an interpreted language designed for controlling the web browser. Using the DOM, it can dynamically access and update the content, structure and style of web pages.
- Cascading Style Sheets (CSS)
Cascading Style Sheets allow styles (e.g. fonts, colours, spacing) to be added to web pages separately from the page content, facilitating updates and accessibility initiatives.

The recommended screen resolution is 1024x768.

The tool can be run from CD-ROM, a local hard drive, a shared network hard drive, or a web server (internet, intranet or extranet).

See **Release notes** below for more information.

5 Installation

There are four installation options for the Records Management e-learning tool:

1. Installation on a web server (internet, intranet or extranet)
2. Installation on a single computer
3. Installation on a shared network drive
4. No installation – run directly from the CD-ROM

5.1 Installation on a web server

Simply copying the “RM Tool” folder to a folder that is accessible by your web server, and then creating appropriate links from other pages to this folder (or “index.html”) should suffice.

The following files are not necessary for web server installation, and can therefore be removed:

- “desktop.ini”
- “icon.ico”
- “Start RM Tool.lnk”

5.2 Installation on an individual computer

5.2.1 Windows PC – default folder

An installer is available (in the “Installer” folder on the CD-ROM) for installing the tool onto the local hard drive of the PC. This will install the tool into the default folder, i.e. “C:\Program Files\RM Tool”.

5.2.2 Windows PC – other folder

An installer is available (in the “Installer” folder on the CD-ROM) for installing the tool onto the local hard drive of the PC. The default folder (“C:\Program Files\RM Tool”) can be overridden if you wish to install to a different folder. **However**, if you do override the default folder, the desktop and start menu items will not work.

Therefore, if you wish to install to a different folder, you can either:

1. Run the installer as above, changing the destination folder as required, and then edit the shortcuts created by the installer (one on the desktop and one in the start menu under “RM Tool”).
2. Copy the “RM Tool” folder to the desired location on your hard drive, and then manually create shortcuts to “index.html” as required.

5.2.3 Non-Windows computer

Copy the “RM Tool” folder to the desired location on your hard drive, and then manually create shortcuts / aliases / symbolic links to “index.html” as required.

5.3 Installation on a shared network drive

Copy the “RM Tool” folder to the desired location on the server, and then manually create shortcuts / aliases / symbolic links to “index.html” as required.

5.4 Run from CD-ROM

The Records Management e-learning tool can be run directly from the CD-ROM. On most Windows PCs, the tool will run automatically when the Records Management e-learning tool CD is inserted.

If the tool does not run automatically, double click on the icon for the CD (e.g. within “My Computer”). If the tool still does not run automatically (or if you are using a non-Windows computer, such as an Apple Mac) double click on the “RM Tool” folder on the CD-ROM, and then double click on “index.html”.

6 Customisation

The tool has been created using standard web technologies (such as HTML) and can therefore readily be edited, and any of the content can be changed by a web developer.

However, if you do not have web development expertise, it is still possible to make some key updates as described below.

Where you need to edit files we do **not** recommend the use of ‘WYSIWYG’ editors. These can alter the code in a way that will prevent the tool from displaying correctly in certain environments. The changes can be more reliably made in simple and easily accessible text editors such as Notepad (found in the “Accessories” menu on most PCs) or in dedicated code editors (e.g. Macromedia Homesite).

6.1 Museum logo

There is a space at the top right of the tool for your museum logo.

6.1.1 Adding your logo

The easiest way to insert your museum logo into this space is as follows:

1. Create (or obtain) a **GIF** image of your logo on a white (or transparent) background.
2. If the image is more than 280 pixels wide or more than 70 pixels high, resize the image to within these constraints. Be sure to preserve the proportions (or “aspect ratio”) of your image when doing so.
3. Name this file “museum-logo.gif”.
4. Copy this file to the “RM Tool/images/template” folder (replacing the image of the same name that is already there).

6.1.2 Positioning your logo

If you wish to alter the position of the image, the easiest way to do so is to edit your image so that it has the required amount of space around it necessary to push it away from other elements on the screen (this will probably be a case of trial and error). Ensure that, in doing so, you do not make the overall image (including any space around it) more than 280 pixels wide or more than 70 pixels high.

Alternatively, you can alter the position of the logo by editing the “RM Tool/css/main.css” file. Looks for lines that read similar to the following:

```
#museum-logo { /* edit padding & width/height if necessary to
position museum logo */
  display: inline;
  float: right;
  text-align: right;
  height: 70px;
  width: 280px;
  padding-top: 0px;
  padding-right: 0px;
}
```

If you increase the value for padding-top (**and** decrease the value for height by the same amount) the image will move **down**.

If you increase the value for padding-right (**and** decrease the value for width by the same amount) the image will move **left**.

However, your image will need to be smaller than the **revised** height and width.

6.1.3 Other image formats

If you wish to use an image that is not a GIF, you will need to copy the logo to “RM Tool/images/template” folder as above, and then edit each file in the “RM Tool” folder to replace “museum-logo.gif” with the name of your logo file.

6.1.4 Adding alternative text

If you wish to add text that should display if your logo does not (such as the name of your museum) you will need to edit each file in the “RM Tool” folder to add this text. Looks for code that reads similar to the following:

```
<div id="museum-logo">
<!-- TemplateBeginEditable name="Museum Logo" -->

<!-- TemplateEndEditable -->
</div>
```

(This should be around line 26.)

Add your desired text between the double quotes towards the end of the second line above. This text should be less than 150 characters, and must **not** contain:

- double quotes (“
- ampersands (&)
- greater than (>) signs
- less than (<) signs.

Note that this text should not include any characters that are not on a standard keyboard (e.g. “Renaissance London™”).

Typically this text will simply repeat the text displayed in your logo (e.g. “Renaissance London” or “Renaissance London – museums for changing lives”) and should **not** contain descriptive words such as “logo” or similar (e.g. “Museum logo” or “Renaissance London strapline”).

6.2 Body of the text

You can edit any of the text in the tool by opening the relevant file in a text editor such as Notepad.

6.2.1 Editing guidelines

When editing the text in the tool, you should be aware of the following:

- Any amount of consecutive space, tabs and carriage returns will be displayed as a single space.

For example:

```
Records                               Management  
                                     e-learning  
                                     tool
```

will be displayed as

```
Records Management e-learning tool
```

- Paragraphs should be contained within <p> and </p>.

For example:

```
<p>First paragraph</p><p>Second paragraph</p>
```

will typically be displayed as

```
First paragraph
```

```
Second paragraph
```


- If you need a line break, use: `
`

For example,

Records Management`
`e-learning tool

will typically be displayed as

Records Management
e-learning tool

Please note that you should **not** use line breaks to create paragraph breaks (see above for how to create paragraph breaks). Also, you should not use line breaks unnecessarily.

For example:

This paragraph includes an unnecessary line-break and may`
` therefore be displayed incorrectly.

could actually be displayed as

This paragraph includes an unnecessary line-break and
may
therefore be displayed incorrectly.

if there is not enough space to display all of the text intended for the first line on a single line. Even if it displays as intended for you, it may not display correctly for other users who have a different user environment (operating system, browser, browser window size, screen resolution, font size, etc.)

- If you need to display an ampersand, use: `&`

For example:

Health `&` Safety

will be displayed as

Health & Safety

- If you need to display a greater than sign, use: `>`

For example:

2 `>` 1

will be displayed as

2 > 1

- If you need to display a less than sign, use: `<`

For example:

`1 < 2`

will be displayed as

`1 < 2`

- Text that needs to be emphasised should be contained within `` and ``

For example:

The word `emphasis` is emphasized.

will typically be displayed as

The word *emphasis* is emphasised.

However, some browsers may emphasize in different ways (for example, text-to-speech browsers for the visually impaired, may emphasise the words vocally).

- Text that needs to be strongly emphasised should be contained within `` and ``

For example:

The words `strong and emphasis` are strongly emphasized.

will typically be displayed as

The words **strong and emphasis** are strongly emphasised.

However, some browsers may emphasise strongly in different ways (for example, text-to-speech browsers, for the visually impaired, may say the words more loudly).

6.2.2 Editable regions

While any of the site content can be edited, certain areas of text have been created specifically for museums to update with information relevant to their own records management policies. These sections can easily be identified in the code as they all start with

```
<!-- ***** -->  
<!-- *** START OF EDITABLE REGION *** -->
```

and they all end with

```
<!-- *** END OF EDITABLE REGION *** -->  
<!-- ***** -->
```

(Text within <!-- and --> is a “comment”, and is not displayed to users of the tool.)

These are nine such sections, as follows:

1. Section 2, page 2 (“RM Tool/s02p02.html”)

```
<!-- ***** -->  
<!-- *** START OF EDITABLE REGION *** -->  
<!-- ***** -->
```

In order for the museum to comply with the DPA, it is very important that all members of staff follow the guidelines provided by the museum.

```
<!-- ***** -->  
<!-- *** END OF EDITABLE REGION *** -->  
<!-- ***** -->
```

2. Section 3, page 1 (“RM Tool/s03p01.html”)

```
<!-- ***** -->
<!-- *** START OF EDITABLE REGION *** -->
<!-- ***
<!-- *** The preferred text for this region is along *** -->
<!-- *** the lines of the following: *** -->
<!-- ***
<!-- *** The [museum name here]'s [post here] is *** -->
<!-- *** responsible for agreeing and managing *** -->
<!-- *** appraisal of museum records. *** -->
<!-- ***
<!-- ***** -->
```

The senior management team is responsible for agreeing and managing appraisal of museum records.

```
<!-- ***** -->
<!-- *** END OF EDITABLE REGION *** -->
<!-- ***** -->
```

As shown in the comment above, there is a preferred format for this text, i.e.

The [museum name here]'s [post here] is responsible for agreeing and managing appraisal of museum records.

3. Section 4, page 3 (“RM Tool/s04p03.html”)

```
<!-- ***** -->
<!-- *** START OF EDITABLE REGION *** -->
<!-- ***
<!-- *** The preferred text for this region is along *** -->
<!-- *** the lines of the following: *** -->
<!-- ***
<!-- *** The [museum name here]'s *** -->
<!-- *** [department or post name here] is *** -->
<!-- *** responsible for agreeing and managing the *** -->
<!-- *** use of the museum's file plan. *** -->
<!-- ***
<!-- ***** -->
```

The museum's senior management team is responsible for agreeing and managing the use of the museum's file plan.

```
<!-- ***** -->
<!-- *** END OF EDITABLE REGION *** -->
<!-- ***** -->
```

As shown in the comment above, there is a preferred format for this text, i.e.

The [museum name here]'s [department or post name here] is responsible for agreeing and managing the use of the museum's file plan.

4. Section 4, page 4 (“RM Tool/s04p04.html”)

```
<!-- ***** -->
<!-- *** START OF EDITABLE REGION *** -->
<!-- ***** -->
```

Refer to the museum's file plan for further guidance.

```
<!-- ***** -->
<!-- *** END OF EDITABLE REGION *** -->
<!-- ***** -->
```

5. Section 4, page 5 (“RM Tool/s04p05.html”)

```
<!-- ***** -->  
<!-- *** START OF EDITABLE REGION *** -->  
<!-- ***** -->
```

Refer to the museum's records retention schedule to help you make decisions about what to file.

```
<!-- ***** -->  
<!-- *** END OF EDITABLE REGION *** -->  
<!-- ***** -->
```

6. Section 4, page 6 (“RM Tool/s04p06.html”)

```
<!-- ***** -->  
<!-- *** START OF EDITABLE REGION *** -->  
<!-- ***** -->
```

Remember to refer to the museum file plan and naming conventions guidance. This will allow file names and folder structures to be consistent across formats.

```
<!-- ***** -->  
<!-- *** END OF EDITABLE REGION *** -->  
<!-- ***** -->
```

7. Section 4, page 7 (“RM Tool/s04p07.html”)

```
<!-- ***** -->
<!-- *** START OF EDITABLE REGION *** -->
<!-- ***
<!-- *** The preferred text for this region is along *** -->
<!-- *** the lines of the following: *** -->
<!-- ***
<!-- *** The [museum name here]'s *** -->
<!-- *** [department or post name here] is *** -->
<!-- *** responsible for giving you guidance on *** -->
<!-- *** these issues. *** -->
<!-- ***
<!-- ***** -->
```

Your line manager is responsible for giving you guidance on these issues.

```
<!-- ***** -->
<!-- *** END OF EDITABLE REGION *** -->
<!-- ***** -->
```

As shown in the comment above, there is a preferred format for this text, i.e.

The [museum name here]'s [department or post name here] is responsible for giving you guidance on these issues.

8. Section 4, page 8 (“RM Tool/s04p08.html”)

```
<!-- ***** -->
<!-- *** START OF EDITABLE REGION *** -->
<!-- ***
<!-- *** The preferred text for this region is along *** -->
<!-- *** the lines of the following: *** -->
<!-- ***
<!-- *** The [museum name here]'s *** -->
<!-- *** [department or post name here] is *** -->
<!-- *** responsible for agreeing and managing *** -->
<!-- *** the records management programme that *** -->
<!-- *** includes storage and related policies *** -->
<!-- *** that address the above issues. *** -->
<!-- ***
<!-- ***** -->
```

The senior management team is responsible for agreeing and managing the records management programme that includes storage and related policies that address the above issues.

```
<!-- ***** -->
<!-- *** END OF EDITABLE REGION *** -->
<!-- ***** -->
```

As shown in the comment above, there is a preferred format for this text, i.e.

The [museum name here]'s [department or post name here] is responsible for agreeing and managing the records management programme that includes storage and related policies that address the above issues.

9. Section 5, page 1 ("RM Tool/s05p01.html")

```
<!-- ***** -->
<!-- *** START OF EDITABLE REGION *** -->
<!-- ***
<!-- *** The preferred text for this region is along *** -->
<!-- *** the lines of the following: *** -->
<!-- ***
<!-- *** The [records professional] in *** -->
<!-- *** [name of museum]. The designated staff *** -->
<!-- *** person in the museum may be a records *** -->
<!-- *** manager, archivist, librarian, information *** -->
<!-- *** manager or a member of your Senior *** -->
<!-- *** Management Team. *** -->
<!-- ***
<!-- ***** -->
```

The records professional at your museum.

```
<!-- ***** -->
<!-- *** END OF EDITABLE REGION *** -->
<!-- ***** -->
```

As shown in the comment above, there is a preferred format for this text, i.e.

The [records professional] in [name of museum]. The designated staff person in the museum may be a records manager, archivist, librarian, information manager or a member of your Senior Management Team.

7 Tips

7.1 Printing

Some quiz questions contain pull-down menus rather than checkboxes. (This is to prevent the need to scroll vertically.) Unfortunately, it is not possible to see all the options from pull-down menus on printed pages, unless you disable JavaScript first.

7.2 Internet Explorer

If you use the tool in Internet Explorer, you may see a bar across the top of the page that says:

"To help protect your security, Internet Explorer has restricted this page from running scripts or ActiveX controls. Click here for more options..."

To enable the tool for your current Internet Explorer session, click on the bar, choose "Allow Blocked Content" from the menu, and then click "Yes" in the box that pops up.

8 Release notes

The tool has been created to support a wide range of browsers and installation environments. However, some issues may exist in less common environments. Known issues are documented below.

1. The tool may not display entirely as intended in some old versions of browsers which are no longer supported by the browser manufacturer, or which have since been superseded, e.g.
 - Microsoft Internet Explorer 5 or earlier (no longer supported by Microsoft)
 - Netscape Navigator (no longer supported by Netscape)
 - Apple Safari 2 or earlier (superseded by Safari 3)

However, issues have been minimised as far as possible **and the tool should still be fully accessible in many (if not all) of these browsers.**

2. The tool may not display entirely as intended on handheld devices. However, **the tool displays well in Pocket Internet Explorer (Windows Mobile 5.0) and should still be fully accessible in other handheld browsers.**
3. Users of Internet Explorer 7 at a resolution of 640x480 may need to scroll horizontally to view some quiz page content. However, since this resolution is not officially supported by Internet Explorer 7 (nor, it seems, by the operating systems that support Internet Explorer 7) **this issue should not be encountered by most users.**
4. The tool may not display entirely as intended if:
 - the user's browser does not support Cascading Style Sheets or if Cascading Style Sheets have been disabled
 - the user's browser does not support JavaScript (including the relevant methods of the Document Object Model) or if JavaScript has been disabled
 - the user's browser has had image loading disabled
 - the user's browser is not using the default text size or the intended fonts.

Note: most browsers do support Cascading Style Sheets and JavaScript (including the relevant methods of the Document Object Model).

Specific known issues affecting the environments above are as follows:

- a. Users of conventional browsers that have image loading disabled, but Cascading Style Sheets enabled, may not see certain bullets or non-essential text (e.g. "You were correct" for individual quiz questions). However, these bullets and text should still appear on print-outs.
- b. Users of Opera that have image loading disabled may need to scroll horizontally to see all of the text that replaces certain images.
- c. Users of large text sizes may see text "spill out" from underneath graphical elements, e.g. "Clear Answers". This text is provided for accessibility and is normally hidden behind the graphical element. However, when the text size increases, but the graphical element does

not, part of the text can become visible. Conversely, "e-learning / Records Management" may not be (completely) visible for these users.

- d. Users without the Franklin Gothic Medium or News Gothic Std Bold fonts will see text in Arial (or Helvetica) instead. This may cause some screens to require a small amount of vertical scrolling.
- e. Users without support for JavaScript (and the relevant methods of the Document Object Model) will be given a non-interactive quiz, and may need to scroll quiz pages vertically. The "Exit" button may also not appear for the same reason.
- f. Users without support for Cascading Style Sheets may have a bullet point appear before each question number.

The tool should still be fully accessible in all of these scenarios.

9 Support

Please email any support requests to:

rmtool@neme.com

Response time is guaranteed to be within two working days (but will typically be sooner).
At the time of writing, support is included until the end of March 2009.