Project Acronym: thinkMOTION
Grant Agreement number: 250485
Project Title: Digital Mechanism and Gear Library goes Europeana

D3.2 - Intermediate report on content location and on IPR

Revision: 1.1

Authors:
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<table>
<thead>
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<th>Dissemination Level</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>P Public</td>
<td>x</td>
</tr>
<tr>
<td>C Confidential, only for members of the consortium and the Commission Services</td>
<td></td>
</tr>
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</table>
Revision History

<table>
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<th>Revision</th>
<th>Date</th>
<th>Author</th>
<th>Organisation</th>
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<td>1</td>
<td>20/06/2012</td>
<td>Victor Petuya</td>
<td>UPV/EHU</td>
<td>Draft of Deliverable 3.2</td>
</tr>
<tr>
<td>2</td>
<td>21/06/2012</td>
<td>Sascha Falke</td>
<td>IUT</td>
<td>Review</td>
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Statement of originality:
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1 Introduction and summary of work progress

In this project, the main objective is to provide attractive high-quality content in the field of motion systems for abroad public in the Europeana portal. To reflect the multi-cultural roots of the according knowledge, partners from six representative European regions form a network which collects very heterogeneous content and makes them available using an approved workflow. This workflow is based on a well-tested approach for producing and publishing digital content concerning motion systems. One of the main steps in the workflow is Work Package 3 (WP3) oriented to the location and providing of relevant contents and the clarification of the rights of use.

The main objectives of Work Package 3 are:

- Locating and selecting relevant content covering the field of mechanical engineering and related fields (biomechanics, nanotechnics, etc.) to give a complete overview on mechanism science in the area of the EU with regard to regional, historical, legal and field of application aspects.
- Registering content in DMG-Lib database and assigning of an unique identification number.
- Clarification of Intellectual Property Rights (IPR) for the input content and obtaining necessary rights of use.
- Providing selected content for digitising process.

In order to fulfil these objectives the Work Package 3 has been divided in the following tasks:

- Task 3.1: Locating, selecting and registering input content

  Each partner will lead the search and selection of applicable material within its country and its specific expertise. Input content includes: textual sources (e.g. books, articles, proceedings, etc.), pictures, slides, videos, animations, CAX models and physical models, mechanism applications in robotics and mechatronics.

  The selected content will be registered in DMG-Lib database.

- Task 3.2: Clarification of Intellectual Property Rights (IPR) for the input content

  Identifying public domain (free of IPR) content
  Finding out author’s or publisher’s addresses for non public domain content and make the first contact
  Making clearing agreements for non public domain content

- Task 3.3: Providing selected content for the following digitising process

  Depending on the capacity of the digitising work places the input content will be provided for digitising.
The chart in Figure 1 shows the WP structure of the thinkMOTION project. As seen, the main dependency chain is formed by the tasks of locating (WP3), digitisation (WP4) and processing (WP5).

Figure 1. Dependencies between the work packages within the thinkMOTION project

2 Workflow and results

As seen in the objectives presented, the key task for WP3 is the location and selection of content sources to feed the other WPs of the workflow. In order to assure a good quality, variety and broad geographical distribution of the items, several selection criteria have been identified.

The main selection criteria for the locating of the project content sources have been:

- Tradition in research, creation and innovation in mechanism and machine science. Only top universities in technical high education have been contacted.
- Tradition and academic recognition of organizers regarding the scientific and technical value of conferences and journals.
- Thematic relevance. Relevance in the field of mechanisms and machines.
- User-oriented relevance. Relevance for different user groups (e.g. teaching materials for students, animations from patents for laymen and non-experts).
- Scientific value
- Technical novelty
- Historical importance
- Appropriate cost-value ratio in terms of time/productivity.
- Accessibility of the items.
- Feasibility of IPR clarification or free-IPR contents.
- Good accessibility (available at university library or libraries nearby)
- Wide geographical distribution in all countries.
- Wide temporal distribution of the items.
- Language diversity.
All partners are working actively in WP3. The steps in the workflow of WP3 coincide substantially with the tasks detailed in the Introduction section and are used in the following chapter.

2.1 Locating content providers

First, each partner must search for relevant content within its country and its specific expertise. Input content includes: textual sources (e.g. books, articles, proceedings, etc.) pictures, slides, videos, animations, CAx models and physical models, mechanism applications in robotics and mechatronics. The workflow for locating and providing content for digitization is proven.

With the support of the national University Libraries text documents like books or proceedings are located and provided using interlibrary loan services. Physical models and other kinds of contents (e.g. collection of slides) are provided by other institutions (e.g. Technical University of Dresden and Chemnitz). Some private companies as DYNA have been subcontracted to handle and digitize old journals in their facilities.

Results on location of content providers

The work in WP3 was initially focused on historical and recent content of the consortium’s own institutes and on patents. After the first year, all the partners have been focused on broadening the content sources mainly at regional and national level contacting them and asking to collaborate. Many negotiations have been successful. As a result, the number of active content providers has been considerably increased during the second year of the project. Additionally, the partners have got in contact with industry, but in general they have found that negotiations and IPR clarification are very complex and very time-consuming. In order to increase the productivity, all the partners have also focused on detecting new free-IPR content sources as National Patents Offices.

As a result, all the project partners have already enough content sources for the digitising and importing process in WP4 and WP5. They have located a sufficient amount of content sources, persons and institutions, which are willing to co-operate, understanding the importance of the project and providing items of interest for DMG-lib.

Table 1 and ANNEX 1 show the most important active content providers for the thinkMOTION project.
### Table 1: Most important content providers for thinkMOTION project

<table>
<thead>
<tr>
<th>Country</th>
<th>Content provider</th>
</tr>
</thead>
</table>
| Germany | - Journal Industrieanzeiger  
- VDI Verlag (VDI-Verein Deutscher Ingenieure)  
- RWTH Aachen University Library  
- Museum “Zinkhütter Hof”  
- Several national publishers  
- Technical University of Dresden  
- Chemnitz University of Technology  
- Technische Universität Braunschweig  
- German authors of motion systems scientific community |
| Romania | - Politehnica University of Timişoara  
- Gheorghe Asachi Technical University of Iasi  
- Transilvania University of Braşov  
- Technical University of Cluj-Napoca  
- National Patent Office (OSIM)  
- University “Dunarea de Jos” Galati  
- University of Craiova  
- Journal Scientific Bulletin of The University “Politehnica” of Timisoara, Transaction on Mechanics  
- Bulletin of the Transilvania University of Brasov  
- Acta Technica Napocensis Series Applied Mathematics and Mechanics  
- Proceedings of the Conference COMEFIM  
- Politehnica University Bucharest |
| France | - PATSTEC national project (www.pastec.fr) :  
  o Agreement signed at the regional level (région Auvergne, contact Nathalie VIDAL)  
  o Access to the collection of mechanical calculators of Lecoq Museum  
- Central Library of Clermont. Agreement under construction.  
- Michelin Museum  
- Crozatier Museum of Puy en Velay, Pierre and Alexandre CLAIR collection  
- Bordeaux 1 University |
| Spain | - DYNA Journal  
- Anales de la Asociación Española de Ingeniería Mécanica (Journal)  
- Faculty of Engineering of Bilbao  
- Research Groups of the Spanish Network of Mechanical Engineering  
- Fundación Barreiros  
- University of Salamanca  
- Public University of Navarre  
- Spanish Patent Office  
- Ingeniería y Territorio Journal |
| Italy | - Boaga Library of the School of Engineering of ‘La Sapienza’ University in Rome  
- Library of the Castelnuovo School of Mathemaics of ‘La Sapienza’ University in Rome  
- Library of the Dept of Mechanic and Aeronautics of ‘La Sapienza’ University in Rome  
- Library of Montecassino Abbey  
- Library of the School of Engineering of Pisa University in Pisa  
- IFToMM Archive in CISM of Udine  
- Personal archive of prof Marco Ceccarelli  
- Personal archive of prof Michela Cigola |

The selected content sources detailed in Table 1 can provide the project a sufficient number and variety of quality items to fulfil the project indicators. The types of already imported items are:
- Images
- Movies
- Physical models
- Interactive animations and Mechanism descriptions
- CAx files
- Biographies.

The process of registering all the individual items, being done in parallel with the metadata creation is running well. The partners also have done an effort on increasing the multilingualism of the contents. Currently, you can find in the database almost all types of items in all of the languages of the partners.

Consequently, the objective of locating the content sources to provide enough items in quality, quantity and variety is being achieved. Nevertheless, the project partners continue negotiating with new content providers in order to increase, not only the number of items provided to the project but also their value in terms of quality, variety and geographical distribution. Table 2 shows content providers that are planned to be involved during the next project period in order to broaden the scope of the project. ANNEX 1 shows a more detailed list of the types of items to be provided by the most promising sources in negotiation.

Table 2: Important content providers for thinkMOTION project, negotiation are necessary or partly in process

<table>
<thead>
<tr>
<th>Country</th>
<th>Content provider</th>
</tr>
</thead>
</table>
| Germany   | - Negotiating with HUSS Verlag located in München (Germany). The HUSS Verlag owns and manages the collection of the literary remains (Nachlass) of the following publishers: Verlag Technik, Fachbuchverlag Leipzig und Militärverlag Dresden. They have a huge collection of books (at least 5000) in the different fields of technics and engineering but these books are not published any longer and at the moment no one has access to these collections. In the first round of negotiations HUSS Verlag showed strong interest to republish the collections in a digital form.  
- Kaunas University of Technopoly (Lithuania) – publisher of MECHANIKA Journal  
- Negotiating with the IPR-heir of “Luegers Lexikon der gesamten Technik” (Technical encyclopedia, consisting of 7 volumes and covering a wide range of technical topics). First talks were very positive.  
- Negotiating with Prof Gosselin in Canada. He can provide many PhD theses and a collection of robots.  
- Negotiation with 3 publishing houses for journals  
- Other 50 open requests at industrial enterprises that might provide brochures and images |
| Romania   | - Other museums in Romania, which hold technical sections  
- Providers in Hungary |
| France    | - Musée National des Arts et Métiers  
- INPI patent database from the 19th century  
- M. Ferri collection of fixed engines: around 50 engines  
- Agrivap Museum Ambert: preliminary contact. They have hundreds of big and smaller machines, ranging from agriculture to textile industry. Several tens of |
<table>
<thead>
<tr>
<th>Country</th>
<th>Content provider</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>steam engines.</td>
</tr>
<tr>
<td></td>
<td>- We identified a private collection of around 400 typewriters at Chateauroux</td>
</tr>
<tr>
<td></td>
<td>- Other universities</td>
</tr>
<tr>
<td></td>
<td>- Private companies</td>
</tr>
<tr>
<td>Italy</td>
<td>- Library of the Dept of Architecture and Restauration of ‘La Sapienza’ University in Rome</td>
</tr>
<tr>
<td></td>
<td>- National office for Patents in Rome</td>
</tr>
<tr>
<td></td>
<td>- Italian Central Archive for Patents in Rome</td>
</tr>
<tr>
<td></td>
<td>- Museum of Engines at University of Palermo</td>
</tr>
<tr>
<td></td>
<td>- Museum of Military Transportations in Rome</td>
</tr>
<tr>
<td>Spain</td>
<td>- Sociedad Bilbaina Library</td>
</tr>
<tr>
<td></td>
<td>- Fundación Juanelo Turriano</td>
</tr>
<tr>
<td></td>
<td>- Library of the Regional Mechanical Engineering Association in Bilbao</td>
</tr>
<tr>
<td></td>
<td>- New Spanish research groups via the Spanish Network of Mechanical Engineering</td>
</tr>
</tbody>
</table>

2.2 Clarification of IPR rights

After locating the content, which is not in the public domain, the rights of use must be granted by the IPR holder. For this, a first thinkMOTION letter must be addressed to the right holder of the content (author / heir / publishing company). Then further search must be done in order to enter the metadata in the database and register the content. Next, a Letter of Agreement must be generated. The procedure for generating this Letter of Agreement is detailed in a tutorial (see ANNEX 2: Generating of the Letter of Agreement & list of documents).

Results on IPR rights clarification

The editor tool for generating the Letter of Agreement for the IPR clarification is completely developed and optimized. It has been adapted to the national requirements of all the partners. Letters of Agreement can be generated in English, German, French, Italian, Spanish and Romanian. The editor tool helps the operator to generate a Letter of Agreement according to the different use cases (Figure 2). All the necessary documents for the IPR clarification are generated and managed within ProDB system. Currently all the partners are using this tool for the IPR clarification process. Figure 3 shows a Letter of Agreement generated by the ProDB system.
Figure 2. Generator for letter of agreement and list of literature

Figure 3. Example of Letter of Agreement generated by ProDB system
The workflow for locating and providing content for digitization is proven and will be used for Task 3.1 and Task 3.2 until the end of the project (Figure 4). In the workflow is clearly stated that prior to the scanning process is mandatory to do the IPR clarification. Also, in order to make more efficient the workflow, every partner has designated one person who is responsible for rights clarification.

Currently, all the partners continue the IPR-release negotiations with their potential content providers. Nevertheless, during the second year of the project and in order to increase their productivity, most of them have concentrated their efforts on

- Producing items from the content providers with their IPR clarified
- Finding materials, which are free of IPR
- Locating sources from which they could get many items at once (e.g. journals, patents).

Table 3 presents the number of Letters of Agreement already signed by each partner and the Letters currently in negotiation. The partners with a low number of signed IPR agreements are mainly focused on the processing of free of IPR items.
Table 3. Indicators related IPR clarification.

<table>
<thead>
<tr>
<th>IUT</th>
<th>RWTH</th>
<th>UPT</th>
<th>UCAS</th>
<th>IFMA</th>
<th>UBC</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>8</td>
<td>106</td>
<td>100 (approx.)</td>
<td>0</td>
<td>24</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>IUT</th>
<th>RWTH</th>
<th>UPT</th>
<th>UCAS</th>
<th>IFMA</th>
<th>UBC</th>
</tr>
</thead>
<tbody>
<tr>
<td>52</td>
<td>4</td>
<td>539</td>
<td>30 (approx.)</td>
<td>0</td>
<td>15</td>
</tr>
</tbody>
</table>

2.3 Selected content provided for the digitizing process

Content, which does not exist in digital form, has to be digitised in WP4. Depending on the capacity of the digitising workplaces, the input content will be provided for digitising. The quality of digital existing content must be improved in WP5.

Results in content providing for digitization

The IUT partner works together with his University Library by using their own stock of books or by using the interlibrary loan service of the Germany GBV Union Catalogue. The Ilmenau University Library has optimal connections to TIB Hannover, SUB Göttingen, THULB Jena and UB Braunschweig. They get the content sources for digitizing process by borrowing from other libraries, taking from the in-house collections of our library or the authors provides us the paper sources for scanning process. The digitization process in WP4 takes place in our one's house.

Aachen partner has many books (and other materials) available at their institute or the university library, so obtaining these documents is easy and they didn’t have to use interlibrary loan so far. For the digitisation of about 300 student works they have contracted a local scan service who offered a pick-up service. In the case of our co-operation with a local museum, one colleague went there for one day to take pictures of the exhibits (agricultural machines).

In the case of UCAS partner, normally, the digitized contents are shared in specific dropbox folders. After the approval, the content is collected in specific portable hard disks. Afterwards it is uploaded into DMG-Lib. Material coming from external companies is collected in DVDs to be uploaded into DMG-Lib.

For digitising content in IFMA, a partnership with the central library (BCU) exists.

The UPT library is also an important content provider and also an efficient gate of access to the content held by other important libraries in the country (libraries of universities, library of Romanian Academy and others). Proceedings of various traditional Romanian national conferences such as MTM, PRASIC, COMEFIM and others are valuable content providers.
The digitization of the majority of the Spanish printed content, which are not available in electronic format, is being performed in UBC. The old DYNA journals will be only handled by DYNA and digitalised in their facilities using their resources.

Sometimes, book transportation may be a problem in terms of time and costs. Also, some museums have machines and mechanical models. As a solution, it is necessary to plan additional scanning activities in the museums and libraries to avoid transport.

2.4 Planned work for the next year

The focus in the next year is to finish negotiations with the additional content providers reported in Table 2. As a result of this work, the extended database of content providers of the project will be completed and presented at the end of the project.

IUT will try to make agreements with organisers of conferences to get the rights of use for the papers during the paper submitting. This would be save a lot of time.

During the next year, the collection of signatures for the remaining already sent Letters of Agreement is expected. Also, new letters for first contact and then Letters of Agreement should be sent to the remaining persons.

Other Spanish Research Groups and Institutions will provide new material via the active source of the Spanish Network of Mechanical Engineering.
## ANNEX 1: Detailed list of larger collections located and content providers

### 2.5 Content sources for “Text documents”

<table>
<thead>
<tr>
<th>Type of input content</th>
<th>Description</th>
<th>Type</th>
<th>Amount of items</th>
<th>Content provider</th>
<th>IPR</th>
</tr>
</thead>
<tbody>
<tr>
<td>(books, articles, patents, proceedings, …)</td>
<td>The IFToMM Archive consists of two cupboards marked &quot;IFToMM Archive&quot;. One is 60 cm wide, 50 cm deep and 160 cm high. The second one is 110 cm wide, 50 cm deep and 110 cm high and contains proceedings of IFToMM World Congresses, other proceedings of IFToMM related congresses and other documents.</td>
<td>Analogue and partly digital</td>
<td>Ca. 12000 Ca. 48000 pages</td>
<td>IFToMM Archives at CISM, Udine (Italy)</td>
<td>Signed letter of agreement</td>
</tr>
<tr>
<td>IFToMM Archives at CISM, Udine (Italy)</td>
<td>- documents from the IFToMM President - documents from the IFToMM Secretary General - reports of IFToMM PCs and TCs - other IFToMM documents or documents related to IFToMM - Constitution and by-Laws - Proceedings of IFToMM World Congress - other Congresses and Symposia organized by IFToMM through PCs and TCs - other books published under IFToMM auspices - photos and videos - issues of IFToMM Journal Mechanism and Machine Theory - issues of the IFToMM Bulletin Newsletter - Issues of the IFToMM Journal Problems of (Applied) Mechanics - issues of Gearing and Transmissions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Type of input content</td>
<td>Description</td>
<td>Type</td>
<td>Amount of items</td>
<td>Content provider</td>
<td>IPR</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------------</td>
<td>------</td>
<td>----------------</td>
<td>-----------------</td>
<td>-----</td>
</tr>
<tr>
<td>Patents</td>
<td>German patents concerning mechanisms, gears and motion systems in general</td>
<td>Digital</td>
<td>Ca. 4500</td>
<td>PATON: Patent centre for the regional network at the Ilmenau Technical University</td>
<td>Public domain</td>
</tr>
<tr>
<td>Proceedings of the 13th World Congress in Mechanism and Machine Science, Universidad de Guanajuato (UCEA), México</td>
<td>This congress is held every 4 years and it is the largest conference for mechanism and machine science</td>
<td>Digital</td>
<td>Ca. 320</td>
<td>Mexican Committee of IFToMM</td>
<td>Signed letter of agreement</td>
</tr>
<tr>
<td>Journal</td>
<td>MECHANIKA</td>
<td>Analogue and partly digital</td>
<td>approx. 600 and approx. 60/year</td>
<td>Kaunas University of Technology (Lithuania)</td>
<td>In negotiation</td>
</tr>
<tr>
<td>Articles of &quot;Industrieanzeiger&quot;</td>
<td>Articles concerning mechanisms and other fields of machine science</td>
<td>Analogue</td>
<td>250</td>
<td>Publisher of Industrieanzeiger</td>
<td>Signed letter of agreement</td>
</tr>
<tr>
<td>Student works</td>
<td>Mini, Diploma and PhD theses about mechanism and machine science</td>
<td>Analogue and Digital (pdfs on CDs)</td>
<td>250 theses</td>
<td>IGM Aachen, University’s or other library</td>
<td>Letter of agreement with each author</td>
</tr>
<tr>
<td>Patents</td>
<td>Patents concerning mechanisms, robotics, mechatronics</td>
<td>Digital (pdf download in patent database called DepatisNet or PatSelect)</td>
<td>1400 patents</td>
<td>Database DepatisNet and PatSelect Possible cooperation with local patent service centre</td>
<td>Public domain</td>
</tr>
<tr>
<td>Teaching materials</td>
<td>Teaching materials like lecture notes and examination/ exercise tasks</td>
<td>Analogue and digital</td>
<td>2900</td>
<td>IGM Aachen</td>
<td>Public domain</td>
</tr>
<tr>
<td>Type of input content</td>
<td>Description</td>
<td>Type</td>
<td>Amount of items</td>
<td>Content provider</td>
<td>IPR</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------------</td>
<td>------</td>
<td>----------------</td>
<td>------------------</td>
<td>-----</td>
</tr>
<tr>
<td>Books</td>
<td>Books about mechanism theory</td>
<td>Analogue</td>
<td>70 books</td>
<td>University’s or other library</td>
<td>Letter of agreement with each author or publisher</td>
</tr>
<tr>
<td>Articles of &quot;MTM Proceedings&quot; since 1972 up to 2008</td>
<td>Articles concerning mechanisms and transmissions</td>
<td>analogue and/or digital</td>
<td>611 (total 1611)</td>
<td>UPT</td>
<td>Letters of Agreement partly signed</td>
</tr>
<tr>
<td>Articles of “PRASIC Proceedings” since 1982 up to 2006</td>
<td>Articles concerning mechanisms and transmissions</td>
<td>analogue and/or digital</td>
<td>403 (total 803)</td>
<td>University of Brasov, Romania</td>
<td>Letters of Agreement partly signed</td>
</tr>
<tr>
<td>Articles of “COMEFIM Proceedings” since 1990 up to 2008</td>
<td>Articles concerning precision mechanisms and transmissions</td>
<td>analogue and/or digital</td>
<td>~500</td>
<td>UPT</td>
<td>Entering Metadata Letter of agreement with each author must be generated</td>
</tr>
<tr>
<td>Scientific Bulletin of University “Politehnica” of Timisoara. Transactions on Mechanics.</td>
<td>Articles regarding mechanisms and machines</td>
<td>analogue and/or digital, but not searchable pdf</td>
<td>15</td>
<td>University “Politehnica” of Timisoara</td>
<td>Already negotiated a collective right of use and follows the entering of the metadata</td>
</tr>
<tr>
<td>Books, Ph.D, Reports</td>
<td>Content in the filed of the project</td>
<td>analogue and/or digital, but not searchable pdf</td>
<td>49</td>
<td>Universities in Romania</td>
<td>Letters of Agreement partly signed</td>
</tr>
<tr>
<td>Papers from DYNA Journal</td>
<td>Articles regarding mechanical engineering, academicals issues and industry</td>
<td>Analogue</td>
<td>1500</td>
<td>Publicaciones DYNA journal</td>
<td>One letter of agreement for all the contents</td>
</tr>
<tr>
<td>Type of input content (books, articles, patents, proceedings, …)</td>
<td>Description</td>
<td>Type</td>
<td>Amount of items</td>
<td>Content provider (e.g. library, publisher, university, private person)</td>
<td>IPR (e.g. public domain, signed letter of agreement, in negotiation)</td>
</tr>
<tr>
<td>---</td>
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<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Articles from Anales de Ingeniería Mecánica Journal</td>
<td>Articles regarding mechanisms and machines</td>
<td>Analogue and digital</td>
<td>2200</td>
<td>AEIM-Asociación Española de Ingeniería Mecánica (Mechanical Engineering Spanish Association)</td>
<td>One letter of agreement for all the contents</td>
</tr>
<tr>
<td>Articles from Ingeniería y Territorio Journal</td>
<td>Content in the field of the project</td>
<td>Analogue</td>
<td>10</td>
<td>Colegio de Ingenieros de Caminos, Canales y Puertos</td>
<td>Letter signed by each author</td>
</tr>
<tr>
<td>Material from research groups</td>
<td>Ppt presentations, posters, monographs</td>
<td>Digital</td>
<td>30</td>
<td>Spanish Network of Mechanical Engineering</td>
<td>Letter signed by each author</td>
</tr>
<tr>
<td>Patents from Spanish Patent Office</td>
<td>Patents of mechanisms and mechanical systems</td>
<td>Digital</td>
<td>1000</td>
<td>Spanish Patent Office</td>
<td>Public Domain</td>
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<td>PhD Thesis</td>
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<td>Content in the field of the project</td>
<td>Analogue</td>
<td>20</td>
<td>Sociedad Bilbaina</td>
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</tr>
<tr>
<td>Spanish Books</td>
<td>Content in the field of the project</td>
<td>Analogue</td>
<td>30</td>
<td>Library of the Faculty of Engineering in Bilbao</td>
<td>Public domain</td>
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<tr>
<td>BULLETIN TECHNIQUE DU MACHINISME ET DE L'EQUIPEMENT. AGRICOLES</td>
<td>Technical description of agricultural mechanism, machines and system</td>
<td>Analogue</td>
<td>700 (550 articles + 150 cut images; each images with an individual set of metadata)</td>
<td>Cemagref (French public research center)</td>
<td>Public domain</td>
</tr>
<tr>
<td>Book with many descriptions of agricultural mechanisms. Tec et Doc Cemagref/Lavoisier</td>
<td>Description of agricultural mechanism, tractor, harvester, spreading machines, forage harvest machines</td>
<td>Analogue</td>
<td>500 (400 articles + 100 cut images; each images with an individual set of metadata)</td>
<td>Cemagref (French public research center) and publisher</td>
<td>In negotiation</td>
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<td>(books, articles, patents, proceedings, …)</td>
<td></td>
<td>Analogue or original digital (e.g. pdfs)</td>
<td></td>
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<tr>
<td>Package of old books on agriculture mechanisms and machines (&lt;1927)</td>
<td>Old agricultural machines, dictionaries...</td>
<td>Analogue</td>
<td>100 (70 articles + 30 cut images; each images with an individual set of metadata)</td>
<td>Publisher and private persons</td>
<td>Public domain</td>
</tr>
<tr>
<td>Annales du génie civil et recueils de mémoire</td>
<td>Beautiful journal on civil engineering with many nice figures of machines</td>
<td>Analogue</td>
<td>Thousands</td>
<td>Crozatier Museum of Puy-en-Velay</td>
<td>Public domain</td>
</tr>
<tr>
<td>Principes sur le mouvement et l'équilibre, pour servir d'introduction aux Mécaniques et à la Physique</td>
<td>Marine steam engines.</td>
<td>Analogue</td>
<td>6 drawings</td>
<td>Crozatier Museum of Puy-en-Velay</td>
<td>Public domain</td>
</tr>
<tr>
<td>Notes et formules de l'ingénieur et du constructeur-mécanicien</td>
<td>Excellent engineering book</td>
<td>Analogue</td>
<td>300 pictures</td>
<td>Crozatier Museum of Puy-en-Velay</td>
<td>Public domain</td>
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<tr>
<td>Traité théorique et pratique des moteurs hydrauliques (planches)</td>
<td>Hydraulic engines.</td>
<td>Analogue</td>
<td>16 big figures</td>
<td>Crozatier Museum of Puy-en-Velay</td>
<td>Public domain</td>
</tr>
<tr>
<td>Notice sur les instruments de précision (tome 2)</td>
<td>Excellent book on precision measuring instruments</td>
<td>Analogue</td>
<td>200</td>
<td>Crozatier Museum of Puy-en-Velay</td>
<td>Public domain</td>
</tr>
<tr>
<td>Bulletin de l'Ecole Impériale Polytechnique (1e et 2e division)</td>
<td>Beautiful book on technical machines</td>
<td>Analogue</td>
<td>38 beautiful big size drawings</td>
<td>Crozatier Museum of Puy-en-Velay</td>
<td>Public domain</td>
</tr>
<tr>
<td>Agriculteur manufacturier</td>
<td>Book on agricultural machines</td>
<td>Analogue</td>
<td>100 nice figures</td>
<td>Clermont-Ferrand Central library (BCU)</td>
<td>Public domain</td>
</tr>
<tr>
<td>Annales industrielles</td>
<td>Journal about Industry</td>
<td>Analogue</td>
<td>Many figures (500)</td>
<td>Clermont-Ferrand Central library (BCU)</td>
<td>Public domain</td>
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<td>Annales des arts et manufactures</td>
<td>Journal about Industry and Machines</td>
<td>Analogue</td>
<td>Many figures (500)</td>
<td>Clermont-Ferrand Central library (BCU)</td>
<td>Public domain</td>
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<tr>
<td>Annales des Ponts et Chaussées (Atlas)</td>
<td>Atlas of Civil Engineering</td>
<td>Analogue</td>
<td>Many figures (100)</td>
<td>Clermont-Ferrand Central library (BCU)</td>
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<td>Annales de l'industrie nationale et étrangère</td>
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<td>Analogue</td>
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<td>Journal of Civil Engineering</td>
<td>Analogue</td>
<td>Many figures (100)</td>
<td>Clermont-Ferrand Central library (BCU)</td>
<td>Public domain</td>
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<tr>
<td>Bulletin de la Société de l'industrie minière</td>
<td>Mining industry Beautiful atlas</td>
<td>Analogue</td>
<td>Many figures (50)</td>
<td>Clermont-Ferrand Central library (BCU)</td>
<td>Public domain</td>
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<td>Génie civil</td>
<td>Journal of Civil Engineering</td>
<td>Analogue</td>
<td>?</td>
<td>Clermont-Ferrand Central library (BCU)</td>
<td>Public domain</td>
</tr>
<tr>
<td>L'Invention</td>
<td>About inventions</td>
<td>Analogue</td>
<td>Many figures (50)</td>
<td>Clermont-Ferrand Central library (BCU)</td>
<td>Public domain</td>
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<tr>
<td>Mémoires et Comptes rendus de la société des ingénieurs civils</td>
<td>Journal of civil engineering. Some nice color figures.</td>
<td>Analogue</td>
<td>Many figures (500)</td>
<td>Clermont-Ferrand Central library (BCU)</td>
<td>Public domain</td>
</tr>
<tr>
<td>Recueil industriel, manufacturier, agricole et commercial, de la salubrité publique, des Beaux-Arts, et des Actes de l'Administration</td>
<td>Nice figures of agricultural and industrial machines</td>
<td>Analogue</td>
<td></td>
<td>Clermont-Ferrand Central library (BCU)</td>
<td>Public domain</td>
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<tr>
<td>Revue aérienne</td>
<td>About aeronautics and planes</td>
<td>Analogue</td>
<td>Many figures (100)</td>
<td>Clermont-Ferrand Central library (BCU)</td>
<td>Public domain</td>
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<tr>
<td>Revue de mécanique</td>
<td>Journal of mechanics</td>
<td>Analogue</td>
<td></td>
<td>Clermont-Ferrand Central library (BCU)</td>
<td>Public domain</td>
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<tr>
<td>RUM. Revue universelle des Mines, de la métallurgie de la mécanique, des travaux publics, des sciences et des arts appliqués à l'industrie</td>
<td>Journal on mining and metallurgy.</td>
<td>Analogue</td>
<td>Many figures (1000)</td>
<td>Clermont-Ferrand Central library (BCU)</td>
<td>Public domain</td>
</tr>
<tr>
<td>Société de l'Industrie minière</td>
<td>Journal about Mining</td>
<td>Analogue</td>
<td>70 nice figures</td>
<td>Clermont-Ferrand Central library (BCU)</td>
<td>Public domain</td>
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<tr>
<td>Société des ingénieurs civils</td>
<td>Journal of Civil Engineering</td>
<td>Analogue</td>
<td></td>
<td>Clermont-Ferrand Central library (BCU)</td>
<td>Public domain</td>
</tr>
<tr>
<td>La Technique Moderne. Revue Universelle des Sciences appliquées à l'Industrie</td>
<td>Journal about Technics</td>
<td>Analogue</td>
<td>Many figures (1000)</td>
<td>Clermont-Ferrand Central library (BCU)</td>
<td>Copyrighted</td>
</tr>
<tr>
<td>Revue de mécanique</td>
<td>Journal of Mechanics</td>
<td>Analogue</td>
<td>Many figures (1000)</td>
<td>Clermont-Ferrand Central library (BCU)</td>
<td>Public domain</td>
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<td>(books, articles, patents, proceedings, …)</td>
<td>Comptes-rendus de la Société des Ingénieurs Civils de France</td>
<td>Journal of Civil Engineering</td>
<td>Analogue</td>
<td>Many figures (1000)</td>
<td>Michelin Museum</td>
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<td></td>
<td>Le Génie Civil</td>
<td>Journal of Civil Engineering</td>
<td>Analogue</td>
<td>Many figures (1000)</td>
<td>Michelin Museum</td>
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<td></td>
<td>Italian Books</td>
<td>Selected text books</td>
<td>analogue</td>
<td>90</td>
<td>Library of Dep Mechanics &amp; Aeronautics at University of Rome</td>
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<td>Selected text books</td>
<td>analogue</td>
<td>90</td>
<td>Library of Dep Mechanics &amp; Aeronautics at University of Rome</td>
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<td>Italian Books</td>
<td>Selected text books</td>
<td>analogue</td>
<td>20</td>
<td>Boaga Library of at University of Rome</td>
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<td>IFTOMM Reports</td>
<td>Meeting reports of IFTOMM</td>
<td>Digital and analogue</td>
<td>600</td>
<td>IFTOMM president</td>
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<td></td>
<td>Ancient books</td>
<td>Meeting reports of IFTOMM</td>
<td>analogue</td>
<td>50</td>
<td>Montecassino library</td>
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</table>
Figure 5. Examples of input content for text documents


right: Franz Reuleaux “Vorträge über Maschinenbaukunde” (1868)
Figure 6. Book: El Goniobarímetro (1885). Before (Left) and after (Right) image processing and quality improving.
### 2.6 Content sources for “Physical models”

<table>
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<th>Content provider</th>
<th>IPR</th>
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<tr>
<td>Most of these models are made of plexiglass and will be digitised with a</td>
<td>Analogue</td>
<td>400 mechanism descriptions</td>
<td>Universities in Ilmenau, Aachen, Dresden, Chemnitz, Hannover, Braunschweig</td>
<td>Special agreements with Universities</td>
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<tr>
<td>special transparent “digitisation table” combined with a single lens reflex</td>
<td>Analogue</td>
<td>400 images</td>
<td></td>
<td></td>
</tr>
<tr>
<td>camera</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collection of mechanism models made of plastic material</td>
<td>Analogue</td>
<td>159</td>
<td>IGM Aachen</td>
<td>Public domain</td>
</tr>
<tr>
<td>Location: IGM Aachen</td>
<td></td>
<td>(53 images of the models + 53</td>
<td></td>
<td></td>
</tr>
<tr>
<td>videos of the moving mechanisms + 53 mechanism descriptions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mechanism models made of steel and wood, experimental stands</td>
<td>Analogue</td>
<td>15</td>
<td>University “Politehnica” of Timisoara</td>
<td>Public domain</td>
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<tr>
<td>Location: University “Politehnica” of Timisoara</td>
<td></td>
<td>(15 mechanism descriptions)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mechanism models (Figure 8)</td>
<td>Analogue</td>
<td>12</td>
<td>University of Salamanca</td>
<td>Letter signed</td>
</tr>
<tr>
<td>Collection of Max Kohl at the Engineering School of USAL</td>
<td></td>
<td>mechanism descriptions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mechanical simulations</td>
<td>Digital</td>
<td>40 photos</td>
<td>Faculty of Engineering in Bilbao</td>
<td>Letter signed by each author</td>
</tr>
<tr>
<td>Mechanism models (Figure 8)</td>
<td>Analogue</td>
<td>12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collection CLAIR brothers. They were the guys who builds most of</td>
<td>Digital</td>
<td>300 * 10 photos, stereophotos</td>
<td>Crozatier Museum of Puy-en-Velay</td>
<td>To be done but accepted</td>
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<tr>
<td>the reduced models for “Musée des arts et métiers” in Paris in the 19th</td>
<td></td>
<td>and videos = 3000 items</td>
<td></td>
<td></td>
</tr>
<tr>
<td>century 300 real small scale machines or elements of machines</td>
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<td></td>
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</tr>
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<tr>
<td>PATSTEC Auvergne database</td>
<td>Database on existing old scientific devices</td>
<td>Digital (already in a database)</td>
<td>2000*(1 description + 6 photos) = 14000</td>
<td>PATSTEC AUvergne</td>
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<tr>
<td>Musee des Arts et Métiers, Paris</td>
<td>The complete storage area of the biggest museum on machines in France. 95% of the collection is not exposed.</td>
<td>Real machines and objects</td>
<td>To be determined (ca. 80000 items)</td>
<td>Musee des Arts et Métiers, Paris</td>
</tr>
<tr>
<td>Collection of physical models</td>
<td>Around 50 engines, some of them even function !</td>
<td>Real engines</td>
<td>50 * 10 photos and videos = 500 items</td>
<td>Private collection Mr Ferri, AUBIERE, France</td>
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<tr>
<td>LARM collection</td>
<td>LARM prototype 1997 - 2009</td>
<td>Digital (TIFF)</td>
<td>19</td>
<td>University of Cassino</td>
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Figure 5. Collection of mechanism models at the Faculty of Engineering of USAL
Figure 6. Collection of physical model at Chemnitz University of Technology

Figure 7. Collection of 200 machines of Crozatier Museum
### 2.7 Content sources for “CAx data sets”

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<th>Amount of items</th>
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<td>Animations with SolidWorks</td>
<td>Animations of mechanisms described in a patent</td>
<td>Analogue or original digital (e.g. pdfs)</td>
<td>300 (100 animations + 100 mechanism description + 100 thumbnails)</td>
<td>IGM Aachen is going to produce these items</td>
<td>Public domain</td>
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<tr>
<td>Constructions with Cinderella (Interactive geometry software)</td>
<td>Constructions of mechanisms described in patents and books</td>
<td>Analogue or original digital (e.g. pdfs)</td>
<td>1100 (550 animations + 550 thumbnails)</td>
<td>IGM Aachen is going to produce these items</td>
<td>Public domain</td>
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<tr>
<td>CAD models of machines Lecture : Mechanisms and Robotics</td>
<td>Adams Models from 1999</td>
<td>Analogue or original digital (e.g. pdfs)</td>
<td>200 * (1 image + 1 reference + 1 CMD file + 1 video) = 800</td>
<td>IFMA</td>
<td>Public domain</td>
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<tr>
<td>CAD models of machines Lecture : Computer Aided Design</td>
<td>Catia Models made by IFMA 2008-2010</td>
<td>Analogue or original digital (e.g. pdfs)</td>
<td>200 * (1CAD assembly + 5 images + 3 videos + 1 patent) = 2000</td>
<td>IFMA</td>
<td>Public domain</td>
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<td>CAD models of machines Lecture : Computer Aided Engineering</td>
<td>Catia Models made by IFMA 2010 Taken from Artobolevski</td>
<td>Analogue or original digital (e.g. pdfs)</td>
<td>45 * (1CAD assembly + 5 images + 3 videos + 1 scan of Artobolevski page) = 450</td>
<td>IFMA</td>
<td>Public domain</td>
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<td>CAD models of machines Lecture : Master's degree</td>
<td>Catia Models made by IFMA 2010 Taken from Artobolevski</td>
<td>Analogue or original digital (e.g. pdfs)</td>
<td>45 * (1CAD assembly + 5 images + 3 videos + 1 scan of Artobolevski page) = 450</td>
<td>IFMA</td>
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<tr>
<td>CAD models of machines</td>
<td>Catia Models made by IFMA 2011-2012</td>
<td>Analogue or original digital (e.g. pdfs)</td>
<td>Native Catia files + exported data (images, videos)</td>
<td>IFMA</td>
<td>Public domain</td>
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<td>Lecture : Computer Aided Design</td>
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<td>160 * (1CAD assembly + 5 images + 3 videos + 1 patent) = 1600</td>
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<td>CAD models of machines</td>
<td>Catia Models made by IFMA 2011-2012 Taken from Artobolevski</td>
<td></td>
<td>Native Catia files + exported data (images, videos)</td>
<td>IFMA</td>
<td>Public domain</td>
</tr>
<tr>
<td>Lecture : Computer Aided Engineering</td>
<td></td>
<td></td>
<td>45 * (1CAD assembly + 1 Geogebra model + 3 images + 2 videos + 1 scan of Artobolevski page) = 405</td>
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<td>Native Catia files + exported data (images, videos)</td>
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<td>30 * (1CAD assembly + 3 images + 3 videos + 1 scan of Artobolevski page) = 240</td>
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2.8 Content sources for “Images”

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<th>Content provider</th>
<th>IPR</th>
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<td>Images of “Voigt Katalog” showing the collection of Franz Reuleaux (Figure 10)</td>
<td>Franz Reuleaux is a German engineer and scientist. He generated an outstanding and prominent collection of mechanism models which are indexed and visualised in the Voigt Catalogue</td>
<td>Analogue</td>
<td>Ca. 400</td>
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<td>Public domain</td>
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<tr>
<td>Collection of slides</td>
<td>The collections of slides shows teaching material (different machines, diagrams, technical principals, etc.)</td>
<td>Analogue</td>
<td>Ca. 3000 images Ca. 100 mechanism descriptions</td>
<td>Universities of Aachen, Dresden, Ilmenau</td>
<td>Public domain</td>
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<tr>
<td>Technical drawings</td>
<td>Sectional drawing of different mechanisms</td>
<td>analogue</td>
<td>24</td>
<td>IGM Aachen</td>
<td>Public domain</td>
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<td>Drawing in text document</td>
<td>sources: patents</td>
<td>analogue or digital</td>
<td>1863</td>
<td>National Patent Office</td>
<td>negotiated</td>
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<tr>
<td>Drawing in text document</td>
<td>sources: books, PhD thesis</td>
<td>analogue or digital</td>
<td>73</td>
<td>UPT library</td>
<td>signed letter of agreement</td>
</tr>
<tr>
<td>Drawing in text document</td>
<td>Sources: books, PhD thesis, Ppt presentations, posters, monographs</td>
<td>analogue or digital</td>
<td>1000</td>
<td>Spanish Network of Mechanical Engineering</td>
<td>Letter signed by each author</td>
</tr>
<tr>
<td>Drawing in text document</td>
<td>Sources: Papers from DYNA Journal</td>
<td>Analogue</td>
<td>2000</td>
<td>Publicaciones DYNA journal</td>
<td>One letter of agreement for all the contents</td>
</tr>
<tr>
<td>Drawing in text document</td>
<td>Sources: Articles from Anales de Ingeniería Mecánica Journal</td>
<td>Analogue and digital</td>
<td>4000</td>
<td>AEIM-Asociación Española de Ingeniería Mecánica (Mechanical Engineering Spanish Association)</td>
<td>One letter of agreement for all the contents</td>
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<tr>
<td>Drawing in text document</td>
<td>Sources: Spanish Books</td>
<td>Analogue</td>
<td>400</td>
<td>Sociedad Bilbaina Library of the Faculty of Engineering in Bilbao</td>
<td>- Already negotiated - Public domain</td>
</tr>
<tr>
<td>Type of input content</td>
<td>Description</td>
<td>Type</td>
<td>Amount of items</td>
<td>Content provider</td>
<td>IPR</td>
</tr>
<tr>
<td>-----------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>------------</td>
<td>-----------------</td>
<td>-------------------------------------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>Images from Fundación Barreiros archives (Figure 11)</td>
<td>Images of machines and mechanical systems</td>
<td>Digital</td>
<td>20</td>
<td>Fundación Barreiros</td>
<td>One letter of agreement for all the contents</td>
</tr>
<tr>
<td>Photo from camera</td>
<td>Photos of mechanisms, machine-tools, robots and manipulators.</td>
<td>Digital</td>
<td>120</td>
<td>Faculty of Mechanical Engineering of Bilbao, other Spanish Universities</td>
<td>Letter signed by each author</td>
</tr>
<tr>
<td>PATSTEC</td>
<td>Database of old laboratory and technical machines</td>
<td>Digital photo</td>
<td>12000</td>
<td>PATSTEC</td>
<td>Signed letter</td>
</tr>
<tr>
<td>Photos and images</td>
<td>Portraits of persons</td>
<td>Analogue and digital</td>
<td>50</td>
<td>From books, internet webpages and private archives</td>
<td>Public Domain</td>
</tr>
<tr>
<td>Pictures and images from books</td>
<td>designs, models and simulations of robots, mechanisms and manipulators.</td>
<td>Digital</td>
<td>2000</td>
<td>books</td>
<td>Public Domain and signed agreement</td>
</tr>
</tbody>
</table>

Figure 8. Images of Fundación Barreiros archives
Figure 9. Images of “Voigt Katalog” showing the collection of Franz Reuleaux

Gustav Voigt: Kinematische Modelle nach Professor Reuleaux: Katalog, Voigt, Mechanische Werkstatt, Berlin, 1907
ANNEX 2: Generating of the Letter of Agreement & list of documents
Overview

Generation of Letter of Agreement and list of literature
Overview of the status of draft and final versions of Letter of Agreement
How to see fast draft versions of Letter of Agreement
Select the list of documents
Generate the draft letter with list of documents
Translate the text of the Letter of Agreement with the editor
The Letter of Agreement & annex (drafts)
Generate the final letter and list of documents
Explanation of the numbers used in the bar code in the Letter of Agreement

Management of signed Letter of Agreement and list of literature
Select a final Letter of Agreement or an author
Check the final Letter of Agreement
Manage a signed Letter of Agreement or an author

Recommendations and advices
The tutorial guides you through the workflow to generate the Letter of Agreement

On this site (tab Hints) you get an overview of the workflow. It is a kind of sitemap with links to the different steps. The tabs List gener. and List. manag., present the necessary tools for the generation and management of the Letter of Agreement.

The tutorial guides you through the workflow to generate the Letter of Agreement

There are to main steps:
1. The generation of the Letter of Agreement and the list of literature (fig. 1)
2. The management of signed letters of agreement (fig. 2)
In this section (tab List gen.) the Letter of Agreement and its annex (the list of literature) is generated for one author/rights holder.
In this entry field you select the rights holder for whom you want to generate a Letter of Agreement. Enter the name or the DMGId of the person.

This list shows all drafts and final versions of the letter(s) of agreement of one rights holder. In this example Goldhahn, Horst is the author and rights holder.

Every final Letter of Agreement has an individual DMG-ID.

These icons give information about the status of the Letter of Agreement:
- Every item in the list of literature has an individual barcode.
- These icons show if the letter with its annex and together with a covering letter was send to the rights holder.
- These icons show if the letter was signed by the rights holder and if so the date of signature.
- These icons show if the works which can be found in the list of literature are free for scanning, i.e. if the rights clarification was successful and correct, and you are authorized to scan the works. At the moment the Ilmenau team is the only institution who can give the authorisation, i.e. Ilmenau is checking the uploaded signed Letter of Agreement and is unblocking the works.
- This icon shows the type of bar code.

**Generation of letter**

How to see fast draft versions of Letter of Agreement

Use this link to see a draft version of the Letter of Agreement which you are working on. You can also use the same pull down menus to configure the letter and even translate the text of the letter (see page 20).
You can select if the serial number (ser.No.) and dmgId are shown in the list of literature below. Nevertheless both numbers are always shown in the Letter of Agreement.

Preselection to adapt the list of documents which are shown below (see also page 11)

- unselect all: this option clears the list
- keep selection: shows only the selected documents in the list. You can select the documents with the checkboxes.
- only without rights: all documents for which the rights of use are not clarified are shown (these documents are labeled with an x in the list before the serial number)
- select all: all works of an author which are in the ProDB are shown (if the are documents for which the rights of use are clarified the documents are labeled with an R instead of an x)

Procedure

1. Uncheck the checkboxes in the Chosen list of documents AND click on the button Update to update the list
2. Use the show unselected fields and copy&paste dmgIds from field A to B
   - Click on the button Update OR deselect the checkbox show unselected field to hide the unselected field again

Possible use case for this checkboxes: you have a very long list of a single author and you want to make more than one Letter of Agreement. You can paste the selected dmgIds from the first letter (A1) to the unselected dmgIds of the second letter which is the supplemental letter (B2).
**Explanation of the colors and labels in the Chosen list of documents**

**R:** the rights for this document are clarified

**x:** the rights for this document are not clarified

checked **x:** checking a document means the document is part of the annex of the Letter of Agreement and you want the rights holder to give the usage rights for this document. Only the checked documents are part of the annex.

checked **R:** in general this doesn’t make sense thus the row is yellow highlighted. It doesn’t make sense because the **R** indicates that the rights for this document are clarified and if you check it the document occurs again in an annex of a letter.

The row is red highlighted if the chosen author is not part of the document’s metadata. In this example you see the Chosen list of documents by the author Dötzel but his name is not mentioned in the document’s metadata. This happens if e.g. the *External metadata* in the Simple Document Editor are not complete.

---

**Generation of letter**

Select the list of documents

Procedure

1. **Select the list of documents**

   - **Procedure**
     - **Generation of letter**
     - **Select the list of documents**

   - **Explanation of the colors and labels in the Chosen list of documents**
     - **R:** the rights for this document are clarified
     - **x:** the rights for this document are not clarified
     - checked **x:** checking a document means the document is part of the annex of the Letter of Agreement and you want the rights holder to give the usage rights for this document. Only the checked documents are part of the annex.
     - checked **R:** in general this doesn’t make sense thus the row is yellow highlighted. It doesn’t make sense because the **R** indicates that the rights for this document are clarified and if you check it the document occurs again in an annex of a letter.
     - The row is red highlighted if the chosen author is not part of the document’s metadata. In this example you see the Chosen list of documents by the author Dötzel but his name is not mentioned in the document’s metadata. This happens if e.g. the *External metadata* in the Simple Document Editor are not complete.

2. **Generation of letter**

   - **Select the list of documents**

   - **Procedure**

   - **Generation of letter**
     - **Select the list of documents**

   - **Explanation of the colors and labels in the Chosen list of documents**

   - **show all:** all documents of an author are shown. You may need this if you want to select a document but the document is not shown in the Chosen list of documents.

   - **Sorting:** you can sort the list of documents by alphabet (title), author, year of publication or DMG-Lib ID

   - **When ever you change any options press „Update“ to see updated list of documents.**
**Generation of letter**

Generate the draft letter with list of documents

**Kind of Letter of Agreement**

- **First letter**: the first Letter of Agreement send to an author
- **Supplemental letter**: supplementary letter which upgrades an existing letter. A supplementary letter can be necessary if additional documents of an author are added in ProDB.

**Procedure**

1. Select the language of the Letter of Agreement
2. Only in case of supplemental letter: enter the date of signature on the first letter which should be supplemented. The date can be found on the scanned Letter of Agreement.

**Generation of letter**

Generate the draft letter with list of documents

**creator information**

- Hide section: the table „Creator data“ is hidden. This is necessary for agreements with enterprises or publishers which are only rights holders and not creators.
- Empty field: the table „Creator data“ is shown but empty. E.g., if you visit a conference you can use this blank letter to collect agreements of the participants.
- From database: the table „Creator data“ is filled with the data from database.

**toggle „died“-logic (show or hide lines)**

If there is no information about “date of death, place of death” in the ProDB the line is not visible which is the case for all living authors. In case you know that an author died but there is no information in ProDB use the checkbox to make an empty line visible where the rights holders can enter the missing data.
- Information about rights holder
  - Author: the rights holder is the author
  - 1 heir: the author is dead, rights holder is one heir
  - N heirs: the author is dead, more than one heir is the rights holder
  - publisher: the publisher is the rights holder
  - Owner: some kind of owner, e.g. enterprise is the rights holder

Use the checkboxes to toggle the row „represented by“ in the table „Rights holder data“. E.g. this is necessary if an heir is represented by another person.

Finding heirs is not easy – use personal contacts, contacts to families or (former) colleagues to find the heirs.

- Information about relevant documents
  These options refer to the table „Covered documents“ in the Letter of Agreement
  - empty field: the row is empty; this can be necessary e.g. if you visit a conference and want to enter the data by hand
  - all works: the declaration applies to all existing and future scientific publications of the author, i.e. all works in prodb, all works which are published but not yet in prodb, and all works which will be published in the future; selecting this option means that no annex (list of documents) is part of the Letter of Agreement; the reason is e.g. that the work’s metadata can not be found. The author will upload the work or provide the work to the national teams who are entering the metadata into prodb
  - provided works: The agreement covers all works previously as well as prospectively supplied to DMG-Lib. Selecting this option means that no annex (list of documents) is part of the Letter of Agreement; the reason is e.g. that the work’s metadata can not be found. The author will upload the work or provide the work to the national teams who are entering the metadata into prodb
  - 1 Dokument: the agreement applies to the work listed on page 2
  - N Dokumente: the agreement applies to the N works listed from page 2
### Generation of Letter

**Generate the draft letter with list of documents**

**Procedure:**

1. Select the person, adjust list parameters and click **Test** to see changes until the list of documents is correct. For the list of documents, the [DMG Lib](https://www.dmglib.org) allows the selection of documents, or the creation of new documents. The list of documents may be the selected individually or via a selected option to filter the list of documents. For documents, the list of documents may be the selected individually or via a selected option to filter the list of documents.

2. Generate a draft version of the list, download and check it. Make changes as long as the list excludes errors. Drafts are not stored in the database. The person and option only the last draft PDF is selectable.

3. Generate the final version of the list, download and check it. The final version can be changed. Each version has its own document and is directly linked to the production database. At all finalized PDF's, a list of the final (PDF's are listed in each version).

**Letter tester**

- **take values:** take values tested here and apply them in letter/list generation, i.e. all modifications made here are given back to the original pull downs

- **Test:** If the draft letter is not updated automatically you can press the Test button.

---

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Select the person, adjust list parameters and click <strong>Test</strong> to see changes until the list of documents is correct. For the list of documents, the <a href="https://www.dmglib.org">DMG Lib</a> allows the selection of documents, or the creation of new documents. The list of documents may be the selected individually or via a selected option to filter the list of documents. For documents, the list of documents may be the selected individually or via a selected option to filter the list of documents.</td>
</tr>
<tr>
<td>2.</td>
<td>Generate a draft version of the list, download and check it. Make changes as long as the list excludes errors. Drafts are not stored in the database. The person and option only the last draft PDF is selectable.</td>
</tr>
<tr>
<td>3.</td>
<td>Generate the final version of the list, download and check it. The final version can be changed. Each version has its own document and is directly linked to the production database. At all finalized PDF’s, a list of the final (PDF’s are listed in each version).</td>
</tr>
</tbody>
</table>

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*In the future the DMG Lib wants to offer (parts of) the collections as downloads for the users. The DMG Lib can do this unless the rights holders forbid it. So we should try to get the Letter of Agreement without the restrictions.*
Procedure

1. Before you generate the draft Letter of Agreement check the editor to be sure that the text is translated. If you select the language of the letter and there are any translations missing the red button appears Use Editor to fix a problem! (see page 20).

2. Press the button „Generate draft“ to generate a draft of the Letter of Agreement and the annex (list of literature)

3. Right to the button the pdf link appears and the draft is also in the table above

4. Check the draft and make changes if necessary

Translate the text of the Letter of Agreement with the editor

The editor for the Letter of Agreement has a translation function (see page 19).
1. Press the orange highlighted [Edit] button to open the translation editor.
2. Select the language to which you want to make the translation
3. Press apply to finish the translation

Translation is necessary
- for the first work of a national team with the Letter of Agreement
- and during the whole thinkMOTION project duration because it is possible that modifications are done with the text all the time.
- => check if translations need to be done
The Letter of Agreement & annex (drafts)

Generation of letter & annex (drafts)

1. The rights holder gave permission to DMG-Lib Y to permanently archive and maintain the digital versions of the document in full text, as well as to make them publicly available. DMG-Lib Y neither bears any responsibility for the content of the document nor permissions beyond the scope of the rights holder.

2. DMG-Lib Y reserves the right to use or allow others to use the content of the document, including the text, images, and other content managed by the rights holder. DMG-Lib Y shall inform the rights holder of any changes or updates to the content or any information regarding the rights holder.

3. DMG-Lib Y is responsible for setting up the database and maintaining the metadata associated with the document, without changing the content of the document. The rights holder shall be notified of any changes or updates to the database or the metadata.

4. DMG-Lib Y is entitled to make any necessary changes to the document to ensure the technical requirements are met, but without changing the content of the document.

5. It is the responsibility of the rights holder to ensure that the digital version of the document is up-to-date and accurate.

6. It is the responsibility of the rights holder to ensure that the digital version of the document is up-to-date and accurate.

Generate the final letter and list of documents

1. If the Letter of Agreement is okay you can generate the final version using the button „Finalize“. I.e. the final letter gets an own dmgId and is permanently stored. In contrast the drafts don’t have a dmgId and can be overwritten.

2. Download the final version and/or print it

3. Send the final Letter of Agreement and the annex together with a accompanying letter to the rights holder.

Templates of letters which should be sent to the rights holders

Letter for first contact: if you have the first contact with an rights holder and you want him/her to support the DMG-Lib use this letter. This letter is send before a Letter of Agreement is generated.

Accompanying letter: this letter is sent together with the Letter of Agreement

Letter of thanks: this letter is sent to the rights holder after he/she signed the Letter of Agreement
1. Hüsing, Mathias: Cabrio-Verdeckmechanismen toleranzunempfindlich auslegen - Empfindlichkeits- und Toleranzanalyse; VDI-Verl., Düsseldorf; 1996; Nummer 1283; S. 199 - 214

- 202 is EAN standard number for the privat area
- 005811009 is the DMG-ID of the work; for searching the work in prodbi leave out the prefix zeros
- 2 is a check number

On the bottom of the page of the letter you can find the DMGid of the letter
- In this example: 104050 is the DMGid of the Letter of Agreement of the author Ulf Döring

**Why using bar codes?**
- You are sending the final Letter of Agreement to the author for signature. The author has the possibility to make changes in the annex (list of literature), e.g. cross or add some works. If the author is making any changes in the list you must indicate these in the prodbi (using the List. manag. forms)
- You can enter the ids which are changed by the author by hand in the entry field or you can select the entry field and use your bar code scanner (see page 31)
- We recommend to use a bar code scanner to avoid typing errors
- The automatic extraction of dmgIds from bar codes only works in the entry fields of List. manag. (see page 31), it doesn’t work automatically for example with excel
In this section the signed Letter of Agreement and its annex (the list of literature) is managed.

Select a final Letter of Agreement or an author.

Enter the DMG-Lib ID of the Letter of Agreement which can be found on the bottom of the page OR enter the name of the author.
Management of lists

Check the final Letter of Agreement

This field shows automatically the date of generation of final Letter of Agreement.

This link and field shows automatically the name and the DMG-ID of the person who generated the Letter of Agreement.

<table>
<thead>
<tr>
<th>Date of Generation</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>28.02.2011, 14:13</td>
<td></td>
</tr>
</tbody>
</table>

This is the style of barcode used for the letter.
Check the final Letter of Agreement

This icon shows if the letter was sent to the author or not.
If a letter was sent to an author press the red envelope and then the button „send changed data“.

Here you can see the original (unsigned) letter.
This icon shows if the letter was signed by the author / rights holder.
Manage a signed Letter of Agreement or an author

Workflow after the letter is signed by the author or rights holder, and was sent back to you

1. All ids of the works which are part of the Letter of Agreement are automatically entered in the field „original ids (not changeable)“. Check the letter if there are any changes (e.g. added or crossed works). Enter these changes into the fields
   - ids added before signature, i.e. further ids which are also part of the letter (not originally printed, may be added by hand). Use the Simple editor for documents to look for the dmgId or generate a new metadata set for the added documents.
   - ids removed before signature, i.e. originally printed ids which were crossed by the author or rights holder
   - ids without download, i.e. originally printed ids which were marked by the rights holder. The marked ids will be readable in DMG-Lib but no download link will be offered.

   You enter the ids in the fields by hand or you can use a barcode scanner. Click in the fields and scan the corresponding barcode on the list of literature (see page 30).

2. If necessary you can add a comment in the field „Comment“

3. Now scan the signed Letter of Agreement in order to upload it to the prodb.
4. Upload the scanned letter using „Please upload!“
5. Now you can view the uploaded signed Letter of Agreement here.
Manage a signed Letter of Agreement or an author

Workflow after the letter is signed by the author or rights holder, and was sent back to you:

6. You must indicate that the letter is signed by clicking on the signatur icon (then the icon turns green).
7. Enter the date of signature here (e.g. this is necessary for future supplementary letters).
8. Now click on „send changed data“

Workflow after the letter is signed by the author or rights holder, and was sent back to you:

9. Send the original paper version of the signed Letter of Agreement to the Ilmenau team for archiving (DMG-Liba V.). Ilmenau team is checking the data and compares your entries in ProDB and releases the work for the next step which is scanning the work.
Finalisation of lists

Unblock rights in ProDB

Workflows for unlocking rights in ProDB by hand:

1. Make sure that the signed Letter of Agreement (LoA) is scanned, uploaded, archived and approved by IUT.
2. It can happen, that the author’s publications are not listed for the step of list finalisation. Therefore, you can manage the rights by hand.
3. Switch to the authors meta data set (e.g. by searching the author and click on edit).
4. Switch to the Works-Tab and unblock the author for each publication by selecting „OK“ from the drop-down element. To unblock the author for all publications listed, select all check boxes (line markings: „all“), selected the state to be transferred (in this case „rights of use granted“) and click „start“.
5. The indicator lamp switches to green and you can send the updated information. The rights indicator behind the authors name switches to green.
Unblock rights in ProDB

Workflow for unblocking rights in ProDB by hand

6. Switch to the WorkRights-Tab and finally unblock the authors works by selecting „OK“ from the drop-down element. To unblock all works listed, select all check boxes (Line markings: „all“), select the state to be transferred and click „start“.

7. The indicator lamp switches to green and you can send the updated information.

8. Before sending the updated information, please make sure that all authors of the work gave their permission for publication! An author gave his permission if the rights indicator shows up green.

Please note – some advices for the clarification of rights and the generation of the Letter of Agreement

- Rights clarification takes time!

- Only those documents whose legal situation concerning usage/copy rights is clear can be digitised, made online available in DMG-Lib and can be taken into account as Europeana item.
Please note – some advices for the clarification of rights and the generation of the Letter of Agreement

Legal situation

• If the author is dead for more than 70 years the work is in the public domain
  – The clarification of rights is not necessary
  – Try to find as much works in the public domain as you can because clarification of rights costs a lot of time!!
  – Unfortunately finding out the date/year of death can also take a lot of time.

• Secondary publication rights, i.e. all works which are not in the public domain
  – Authors/rights holders must accept the Letter of Agreement and where required the publisher (dependent on the contracts between author and publisher)
    • Books: normally the publisher has the rights of use also for online publication – normally it is unpromising to negotiate with the publisher
    • Journals, proceedings published by a publisher
      o Normally the secondary publication right goes back to the author after one or two years, i.e. after one or two years the author has again the publication right and must not ask the publisher.
      o BUT the authors must check their individual contracts with the publisher. The author/rights holder confirms in the Letter of Agreement to have the right on these documents and that no rights of third persons are breached with the publication.

Please note – some advices for the clarification of rights and the generation of the Letter of Agreement

How to find and identify authors/ rights holders

• First of all check your own publications and the works of all national thinkMOTION colleagues
• Ask ...
  – Colleagues in your university, department, institute, expert group, or other scientific organisations
  – Participants of workshops and conferences (inhouse, national, international)
  – Former colleagues, Alumni
• Research in...
  – other databases,
  – conference proceedings,
  – Reference lists, ...

• Sometimes you have to find the heirs to clarify the rights. Finding heirs is not easy – use personal contacts, contacts to families or (former) colleagues to find them.
Please note – some advices for the clarification of rights and the generation of the Letter of Agreement

Workflow and responsibilities

- First rights clarification then scanning!!!!
- Every partner should have one person who is responsible for rights clarification

For better readability see the next pages
Please note – some advices for the clarification of rights and the generation of the Letter of Agreement

Workflow for paper documents

Register source - enter first metadata ➔ ProDB
Simplified Metadata Editor for Documents

Clarify rights of use ➔ ProDB
Management of rights of use for documents

Locate and procure document ➔ Library/Database Search
Interlibrary loan

Complete and correct metadata ➔ ProDB
IDoc.

Locking data set for digitising ➔ ProDB
Uploader

Digitising sources ➔ Book scanner

Processing scanned sources ➔ ScanTailor
FineReader

Uploading raw and processed data ➔ ProDB
Uploader