STORIES MATTER, Phase II
Instructional Manual

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Edited to include subsequent versions by Kimberley. Moore (2012).

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in collaboration with
The Montreal Life Stories Project

February 2010
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1.0 Introduction

Stories Matter is a new oral history database tool built for oral historians by oral historians, as an alternative to transcription. This free, open source software allows for the archiving of digital video and audio materials, enabling oral historians to annotate, analyze, and evaluate materials in their collections.

In its present form, Stories Matter is intended to allow oral historians and other interested communities to interact with audio and video recordings of interviews in a way that emphasizes individual interviewees as central to stories being narrated. In addition to interacting with whole sessions, users will be able to create clips according to personal criteria, and then create personalized playlists of clips that speak to specific themes. A convenient search tool allows users to locate clips, sessions, interviews, and projects that speak to their particular interests. Users can export the results of their work in several different formats for easy use in presentations, and website design. Finally, a new feature of Stories Matter, Phase II is online functionality, which allows multiple users to collaborate on building a single database according to their assigned user roles.

2.0 Starting Stories Matter

Upon starting Stories Matter, the following interface appears:
Beginning with the icons near the upper left hand corner of the screen, users have a number of options at their disposal.

First is the **home** icon, which allows users to return to the project listing at any point in the project. The second option is the **search** icon, which allows the user to perform text searches within any existing projects, interviews, sessions, and clips. The third option is the **export** option, which allows the user to export the contents of the existing database to PowerPoint presentations or html documents. The fourth icon of a person, allows the user to work with Stories Matter in either French or English, in accordance with their **user preferences**. Finally, the fifth icon leads to the **help** menu and is intended to provide users with basic information on how to use the software.

Another important feature is the **project browser**, located along the left hand side of Stories Matter, which allows users to view the entire contents of the database in a single window.

The project browser continues to grow as database building continues. It provides a quick way to move between projects, interviews, sessions and even clips.
3.0 Creating and Editing a Project

The structure of the Stories Matter interface is best understood in layers, beginning with the **project** layer. A project can encapsulate interviewees, sessions, clips and playlists, depending on the needs of the user.

3.1 Creating a New Project

To begin building your database, select **new project** from the options located at the bottom of the project list (see 3.3 for image).

![New Project Button](image)

Figure 3.1.1: Create a New Project

The following window will appear:

![Project Editor](image)

Figure 3.1.2: The Project Editor

At this point, users need to enter information into four different spaces. The first space requires that the user give their new project a **name**. Secondly, they are to fill in a **short description** of their project, which will later appear on the starting page of Stories Matter in the **project list**. In the third section, the user must enter a more thorough **description** of the project, which will be displayed on the right hand side of the **project list**. Once all these entries are completed, the user should load a relevant image for the project. Finally, the user should decide whether this project should be made visible to collaborators who have access to the database server. If multiple people will need to be able to view and edit this project, select **the project is public**. If not, leave this box blank, and the project will remain hidden from others when working online.

Once these steps have been completed, the user should select **save project**, at which point the Project Editor window will close and the user will see their new
3.2 Browsing Existing Projects

In instances where several projects are listed, users can browse the general contents of individual projects quickly by clicking once on the project image or on the brief description shown in the project list. This function will allow users to view a detailed description of the different projects in the space to the right.
3.3 Editing or Deleting an Existing Project

To edit or delete a project once it has been created, users can select the relevant option from the options appearing along the bottom of the project list.

![Project Options](image)

**Figure 3.3.1: Project Options**

*Please note*: selecting *delete project* will delete all interviewees, sessions, and clips within the project, as well as all associated notes.

4.0 Creating and Editing an Interviewee

Once you have selected a project, double-click on the project image or brief description that appears in the *project list*. This will access the interviewee list. The following interface will appear:

![Interviewee List](image)

**Figure 4.0.1: The Interviewee List**

4.1 Creating a New Interviewee

To create a new interviewee, select *new interview* from the bottom of the *interviewee list*. The following window will be displayed:
The user will be prompted to provide an interviewee name and interviewee description, as in the case of creating a new project. At this point, the user can also choose to upload an image representing the interviewee. Once completed, select save interviewee to add the new interviewee to the interviewee list.

4.2 Browsing Interviewees

In instances where several interviewees are listed, users can browse by clicking once on the project image or brief description shown in the project list. This function will allow users to view a detailed description of the different projects in the window to the right.
4.3 Editing or Deleting an Existing Interviewee

Clicking once on an interviewee icon or short description will allow the user to view the options necessary for editing or deleting an interviewee.

![Interviewee Options](image)

**Figure 4.3: Interviewee Options**

*Please note:* selecting **delete interviewee** will delete all sessions and clips attributed to that interviewee, as well as all associated notes.

4.4 Interviewee Spaces

Double-clicking on an interviewee will allow the user to begin adding information related to the interviewee. The following interface will appear:

![Interviewee Spaces](image)

**Figure 4.4.1: Interviewee Spaces**

At this point, several spaces appear that require the user to input information about the interviewee. Of primary importance is the **interviewee** space, which allows the user to see key information related to the context of the interviewee, such as a brief **summary** of the subjects discussed, the **biographical information** of the interviewee, and any relevant **index terms**.
Figure 4.4.2: Interviewee Summary and Tags

The **summary** field is intended to provide users with a brief description of the contents of the interview. Users can also enter **comma-separated tags**, called index terms. These tags serve two purposes: they are referenced when users search for specific topics, events, and places, for example, and they will be used to generate a **tag cloud** that will highlight key themes within and among projects.

The options located along the bottom of the interviewee space allow the user to add additional information related to their **reflections** on the interviewee and any important **meta-narrative** features that might be present.

Figure 4.4.3: Interviewee Options

The **reflections** space allows users to comment on their experiences of conducting or listening to interviews with a particular interviewee.

Figure 4.4.4: Reflection Space
The **meta-narrative** space allows users to comment on displays of emotion or interesting body language that they find relevant to the issues being discussed.

Figure 4.4.5: Meta-narrative Space

Users can also record **interviewee biographic information** in the upper right hand corner of the interviewee space.

Figure 4.4.6: Interviewee Biographical Information

Finally, users can record **interviewee notes** in the bottom right hand corner of the interviewee space.
4.5 Duplicating an Interviewee

To create a copy of an interviewee, select an interviewee from the Interviewee List (Figure 4.0.1) by clicking on it once. From the interviewee options (Figure 4.4.3) choose **Duplicate Interviewee**. You can rename the Interview, or label it a copy, when you see the below window appear.

Once you have clicked ok, the interviewee will be copied in full (including all sessions, clips, and spaces) and saved within the projects list.
4.6 Relocating Interviewees within the Database

It is possible to migrate an interviewee from one Project location to another within the database. To do so, select the interviewee from the Interviewee List (Figure 4.0.1) by clicking it once. From the Interviewee Options (Figure 4.4.3), From the Interviewee Options, select Edit Interviewee. In the Interviewee Editor, adjacent to the Project field, expand the dropdown menu, and choose the project where you wish to relocate the interviewee.

![Interviewee Editor](image)

**Figure 4.6: Interviewee Editor – Relocate Interviewee Dropdown Menu**

*Note: This function does not duplicate the interviewee. If you wish to include one interviewee within more than one project, use the Duplicate Interviewee function, and relocate the copy of the interview to the desired Project location.*

5.0 Creating and Editing a Session

Sessions appear in the center of the screen when you select an interviewee.

![Session List](image)

**Figure 5.0.1: Session List**
5.1 Creating a New Session

To create a new session, select new session from the bottom of the interviewee list. The session editor will appear:

![Session Editor](Figure 5.1: The Session Editor)

As in the previous cases, the user is required to assign a session name (usually the name of the interviewee and the session number), and session description. The next step is to locate the relevant session media. Once complete, select save session, at which point the session editor will close and the media file will begin importing into Stories Matter.

**Please note:** the session media MUST be in either mp3 or FLV format to be compatible with Stories Matter. For PC users working with AVI files, this conversion process will be completed automatically when they load their files in the session editor. This may be a lengthy process, however, a progress bar will be visible to allow you to estimate the approximate time it will take for the file to convert and upload to the software.

For Mac users, this native conversion process is not yet available due to limitations with Adobe Air. A number of reliable open source conversion tools can be found online, however. Care should be taken to ensure that any converted files are smaller than 600MB and contain a minimum of 3 key frames per second to ensure that the resulting FLVs will be of high enough quality for optimal performance in Stories Matter. For more information on this conversion process, please see the Video Conversion Manual, available for download in the Help section of Stories Matter.

5.2 Browsing Sessions

In instances where several sessions are listed, users can browse the contents of each session by clicking once on the session image shown in the session list. This function will allow users to view the clip list for that session in the space previously reserved for the tag cloud in the bottom left corner of the screen.
5.3 Deleting or Editing Sessions
Clicking once on a session icon or short description will allow the user to view the options necessary for editing and deleting a session.

![Figure 5.3: Session Options](image)

**Please note:** selecting *delete session* will delete all clips created within that session, as well as all associated notes.

5.4 Session Spaces
Double-clicking on a session will allow the user to begin adding information related to the session. The following interface will appear:
As in the case of the interviewee spaces, users are now provided with several options for inputting information about the session they are interacting with. The first option is the **session space** which allows the user to see key information related to the session’s context, such as a brief **summary** of the subjects discussed, the **location** and **date** where the session took place, the **language** in which the session is conducted, the **original medium** of the master recording, and relevant **comma-separated tags**.

To view a map that shows the location where the session was recorded, select **Google maps**, and the following interface will appear:
The options located along the bottom of the interviewee space allow the user to document additional information related to the session.

![Google Map Feature](image)

**Figure 5.4.3: Google Map Feature**

The transcript area allows the user to include a written transcription of the interview session.

![Session Options](image)

**Figure 5.4.4: Session Options**

The **transcript area** allows the user to include a written transcription of the interview session.

![Transcript Space](image)

**Figure 5.4.5: Transcript Space**

The **interviewer** space gives users the option of preserving information about the interviewer, including their name, address, date of birth, and contact information. To keep this information from become public when working online, select **this information is not accessible to the public.**
The interviewee space gives users the option of recording information related to the interviewee, including their name, address, date of birth, and contact information. To keep this information from becoming public when working online, once again, you must select this information is not accessible to the public.

The reflection space allows users to record their reflections on the session.

The meta-narrative space allows users to comment on displays of emotion or interesting body language that they find relevant to the issues being discussed.
The *attachments* space allows users to upload documents, images and other media that are relevant to a given session.

To add an attachment, select **browse**. The following interface will appear:

Finally, should users want to add a new space to document additional information, such as additional interviewers or interviewees, select **create space**. The following window will appear:
At this point, you have the option of adding any one of the previously mentioned space types to the session.

Next, you can record notes on individual sessions in the session notes space to the lower right hand side of the screen.

Similarly, information related to the interviewee’s life history can be entered in the interviewee biographical information space, which remains visible in the upper right hand corner of the screen.
5.5 Duplicating a Session

To create a copy of an interview session, select the session from the Session List (Figure 5.2.1) by clicking on it once. From the session options (Figure 5.3.1) choose **Duplicate Session**. You can rename the session, or label it a copy, when you see the below window appear.

Once you have clicked ok, the session will be copied in full (including all clips, and spaces) and saved within the interviewee sessions list.
5.6 Relocating Sessions within the Database

It is possible to migrate interview session from one Interviewee location to another within the database. To do so, select the interviewee form the Sessions List (Figure 5.2.1) by clicking it once. From the Session Options (Figure 5.3.1), select Edit Interviewee. Adjacent to the Interviewee field, expand the dropdown menu, and choose the Interviewee where you wish to relocate the session.

Figure 5.6: Session Editor - Relocate Session Dropdown Menu

Note: This function does not duplicate the session. If you wish to include one session within more than one interviewee, use the Duplicate Session function, and relocate the copy of the session to the desired Interviewee location.

6.0 Creating, Editing and Exporting Clips

An additional feature of the session layer is the ability to create and edit clips. Clips are intended to allow users to locate specific points in a session where the interviewee discusses subject matter that fits with the user’s specific research interests.

6.1 Creating a Clip

A user can create a clip by selecting the clip in button on the left, waiting until the desired point in the interview, and then selecting the clip out button on the right.

Figure 6.1.1: Clip In and Clip Out

Next, the user must select create clip from the options located along the bottom of the media player. At this point, the clip editor will appear:
Users must enter a **clip name** and **clip description**. To save the clip information, select **save clip**.

### 6.2 Editing or Deleting Existing Clips

Existing clips can be edited by selecting edit clip or delete clip from the options along the bottom of the media player. Users can also generate a clip thumbnail by selecting **create clip thumbnail**. This thumbnail will appear in the tools space when the user views the clip list.

### 6.3 Exporting Clips

PC users have the option of exporting a clip or playlist to their desktop for easy integration into PowerPoint presentations. To do so, users should select the desired clip from the clip list by clicking on it once, and then select **export clip** from the options that appear below the media player. A folder called Stories Matter will be created on the desktop, and within it will be the clip in .avi format.

### 6.4 The Clip List

An additional feature of the Stories Matter, phase II application is the clip list in the bottom left corner of the screen. Any clips created within a session will appear in the clip list, located in the tools space to the left of the media player.
The clip list will show the clip thumbnail, name, and description. Double-clicking on a clip in the clip list will load that clip in the media player and allow the user to edit or delete the clip in question.

6.5 Clip Spaces

Users can also enter relevant information in the clip spaces. Beneath the media player, users can note any reflections they have after listening to the clip.

Users can also enter *comma-separated tags* in the reflection space. These will be referenced by the software when users conduct searches or generate a tag cloud to highlight key themes in interviewees' narratives.

By selecting *meta-narrative* from the options along the bottom of the clips space, the meta-narrative field will appear, allowing users to comment on relevant displays of emotion or body language.
Users can also enter their notes on the clips they create in the **notes** box in the lower right hand corner of the window.

### 6.6 Relocating Clips within the Database

To move a clip to a different session location within the database, select the clip from the Clip List (Figure 6.3.1) by clicking it once. From the Session Options (Figure 6.1.3). From the Clip Options, select **Edit Clip**. Adjacent to the **Session** field, expand the dropdown menu, and choose the Session where you wish to relocate the session.
7.0 Online Functionality

A new feature of Stories Matter, Phase II is that multiple users can now collaborate on a project by accessing and merging databases remotely. To get started, collaborators will need to invest in a server and install Stories Matter. Users may need to employ a software engineer familiar with Adobe Air in order to set this up. From there, an administrator will need to be assigned to access the Stories Matter server, to create the necessary projects, and to create different user roles, such as project manager, publisher and guests. From there, only registered users will be able to upload information to projects. For users who wish to work independently, these additional steps are unnecessary as the software can still be used offline.

7.1 Accessing Stories Matter Online

Users can begin working online by selecting login from the top right-hand corner of the screen.

At this point, the following interface will appear:
Users are required to enter a username, password and server URL in order to access the online server. Users also have the option of selecting login as a guest, which will allow them to access a given server without requiring a user role and password. Next, select login.

At this point, users will be able to view and interact with the database on their host server, and the database built on their home computer will no longer be visible. Users can return to their local database at any point by selecting logout.

7.2 The Merge Tool
While working online, users will be able to merge elements of their local database with the database housed on their online server. To access the merge tool, select the graph icon in the upper left-hand corner of the screen. Users will be presented with a series of database tools:
Please note: users will be able to view the options for exporting and importing files, however these functions are only available in the offline mode.

To begin merging information between the online server and a local computer, select the merge tool. The following interface will appear:

The project listing on the left-hand side of the table shows the database that exists on your local computer, while the project listing on the right-hand side of the table shows the database that is stored on the online server. Within each project listing, files that appear in grey are currently absent. Basic instructions are listed below the project listings, and can be viewed at any time by selecting help.
To merge, select an item in the desired project listing that is black by clicking on it once. At this point, the options below the project listings will change, presenting users with several options:

![Merge Tool Diagram](image)

**Figure 7.2.3: Merging Databases**

To upload a project, interviewee, or session from your local computer to the online database, select **upload**. To download a project, interviewee, or session from the online database to your local computer, select **download**. Users have the option of merging whole projects, merging children, or merging information contained in specific fields. Once you have chosen one of the options, select **apply** to begin the merge process.
If necessary, the merge can be canceled at any time by selecting cancel transfer. Once the merge is complete, the uploaded or downloaded data will be visible in the online and offline versions of Stories Matter.

8.0 Additional Features

There are several additional features incorporated into Stories Matter to make the software more usable for oral historians. These include the ability to create and edit playlists, generate tag clouds, export clips to PowerPoint or back-up the contents of the database in an html document, and finally, search the database using key terms.

8.1 Playlists

The first feature is the playlist feature. Users can create playlists from the clips they create by selecting playlist browser from the options located at the top of the project browser.

From there, users must select a project, at which point the following interface will appear:
Figure 8.1.2: Playlist Interface

By selecting an interviewee listed in the clip list, users will be able to view a complete list of clips for each session.

Figure 8.1.3: The Clip List

To create a playlist, select + from the timeline. Each time the user selects the +, an empty container will appear.
To add a clip to a container, select the empty container by clicking on it once, and the select the desired clip by clicking on it once. The clip will then appear in the container.

Once finished, users can save their playlist by selecting save playlist from the options at the base of the media player. Users can also delete the playlist by selecting clear playlist.

Upon selecting save playlist the following interface will appear:
Users must enter a playlist name and description. Once finished, select **save playlist**. The new playlist will then appear in the playlist browser.

Clicking once on an existing playlist shown in the playlist browser will make additional options appear along the bottom of the **timeline** space. Using these options, users will have the ability to **clear**, **save** changes, **edit**, or **delete** the playlist in question.
Once a playlist has been created, users can listen to it by selecting the play button on the media player. The clips will play one after the other unless the user selects pause.

Users can also write a description of the playlist in the playlist description.

Finally, users can record any notes they have regarding the playlists they create in the notes space located to the right of the timeline.
8.2 The Tag Cloud

As users add comma-separated tags to the interviewee, session and clip layers within Stories Matter, the software will generate a tag cloud. Should the user be interested in determining which themes are being focused upon by the interviewee, then selecting tag cloud from the options located along the bottom of the tools space will display all the tags, making those that are entered into the software more often appear larger than those that are mentioned only occasionally.

Users may choose to view the tag cloud for a given project, a particular interviewee, or a session by selecting the desired option from the tag filter, located at the base of the tag cloud.
8.3 Additional Database Tools

In addition to the merge tool, there are three additional database tools available to users when they select the graph icon from the menu.

First, users have the option of exporting the contents of their database in HTML for easy integration into a webpage. To begin, select **export to HTML**. Users will then be prompted to select a location for the HTML documents.

Upon clicking **select**, the HTML folders will appear in the desired location.

* Helpful hint: Create a new folder for the html files in your desired location using the New Folder option. As this option creates four separate folders and an index, saving it to a new folder will save these files together in a tidy package.
A second option available to users is exporting the contents of their local database for the purpose of creating a backup. This is completed by selecting \textit{export files}.

Upon clicking \textit{select}, the backup will be created in the desired location. Finally, users can restore their database, by selecting \textit{import files}.

Users will be prompted to locate their backup database, at which point the backup files will overwrite the existing database.
8.4 Search

Finally, Stories Matter can be searched easily for particular types of content. Selecting the **magnifying glass icon** from the menu in the upper left hand corner of the software will take the user to a new window where they can conduct a precise or general search of the existing database.

Users can search the database by entering their search terms in the box entitled **search terms**. They can make the search more or less specific by selecting the specific spaces to search. Next, select **search** and the results will be returned in the following format:

The search results will be organized according in layers according to **project**, **interviewee**, **session**, or **clip**. Clicking on a desired result will take the user directly to the corresponding window and allow them to listen immediately to the clip or session in question.
A second convenient way to access the search tool is to click a tag displayed in the tag cloud. Each mention of this tag term will then be displayed in the format shown above (see Figure 8.4.2).

9.0 Conclusion

This instructional manual provides new users with a detailed overview of Stories Matter’s basic functions. Should this fail to answer your question, or if you experience any problems related to the usability of the software, please feel free to contact j@kamicode.com or stories@alcor.concordia.ca for assistance.