EIDR: GETTING STARTED (V1.0)

Getting started with EIDR: What Resources are available, user access needed and their policies.

1 Introduction
Welcome to the EIDR Member Community. This document will define the location and access information and services within the EIDR system. It will also let you know what access and credentials you will need and policies around that information and access.

It is important that the access and use policies defined below are adhered to ensure only the people designated by your organization are accessing, adding or modifying records for their respective companies.

It will be the underlying responsibility of the member organization to monitor and maintain the list of approved personnel that should have access to the EIDR Production and/or Sandbox registry.

2 After Joining EIDR
After the Member Company has signed a Participation Agreement. A more detailed Member Contact Information Sheet will be sent. See Appendix A. This will be sent on EIDR behalf from Alliances Management - Association Management for EIDR.

This Member Contact sheet will identify the Primary and 2 secondary contacts for Business, Technical and POC teams as well as a Credential contacts for the Member Company.

- **Marketing and Business Contact:** Will represent and be the main contact for Member Company at Marketing and Business related discussions and meeting including the monthly EIDR Marketing/Business Working Sessions.
- **Technical Working Group Contact:** Will represent Member Company and be the main contact for Technical related discussions and meetings including the monthly EIDR Technical Working Group (TWG) Sessions.
- **Proof of Concept Team:** Will represent Member Company and be the main contact for POC related discussions and meetings.
- **Credential Contact:** Will be the single point of contact to request and approve all users of the EIDR Member only systems. This contact will be the one
requesting and managing access rights for the Member Company, and will be the one in communication with EDIR Support for all requests and inquiries.

3 Information, Access and Policies

The location, process for requesting, creating and maintaining all user accounts and access for the EDIR Production and Sandbox Registries will be discussed in the following section. The sites for the EIDR Community are:

- External Public EIDR Website
- EDIR Member Web Site
- EIDR Support Site
- EIDR Project Management Site
- EIDR Registry (Sandbox and Production)

For each site we will discuss the following:

- What is available there?
- How do I access it?
- What are its use policies?

3.1 External Public Web Site (eidr.org)

The Main public site for EIDR is located at http://eidr.org. This site has much of the general EIDR information and marketing material about the organizations.

3.1.1 What is Available There?

For New Users the most pertinent information will be found in the Resources sections (http://eidr.org/resources/). This contains General, Technical and Business documentation. It also contains an FAQ section with answers to some general questions about EIDR.

The Technical Documentation section (within the resources page) houses the majority of the detail technical documentation about EIDR, its structure and APIs. It contains the following:

3.1.1.1 Technical Overview

This document provides a technical overview of the registry, including:

- Block-level system architecture
- The Underlying data model for assets and relationships
- Example applications of the data model to movie and TV
- Systems management components, including parties/roles and permissions
• Interface descriptions inclosing the public API, bulk ingest and the UI
• Summary of operating policies, including account management, data integrity, and fault tolerance.

3.1.1.2 API Overview
This is an overview of the public and administrative APIs for EIDR. This document presents it as a traditional procedural API, such as might be used in a Java or JavaScript interface built on top of the underlying HTTP and XML.

3.1.1.3 REST API Reference
This document provides a more detailed and technical review of the API, designed for the builders/creators of such a system.

3.1.1.4 Data Fields Reference
This document provides detailed descriptions of metadata fields stored by EIDR for various types of audiovisual assets.

3.1.1.5 REST Validation Rules
When EIDR records are created or modified, the data is validated in two ways. First, the data must conform to the EDIR schema which specifies many of the requirements on fields and which elements are compatible with one another. In addition, the EIDR Registry performs a number of other validation tests. This document covers the latter. The rules are specified here from the perspective of each of the API functions, and not how the metadata record is eventually serialized or disseminated from the registry. Further, these rules are in addition to those that the metadata schema enforces, and therefore does not replace the schema.

3.1.1.6 Schema Documentation
This link goes to the actual .xsd schema files. Detailed documentation is of the various EIDR schema’s for use by developers will be provided (Under Construction).

3.1.1 How Do I Access It?
There is no password protection or access credentials required for the External Public Web Site. Just navigate to the site and all material will be available to you.

3.1.1 What Are its Use Policies?
Since the external web site is open to the public, there are no specific polices other than those specified on the website. This information can be used and shared with other members or non-members as needed for your efforts.

3.2 EIDR Support Site (Zendesk)
The EDIR support site is the main access point for the Member Company for information about the registry, request support from the registry, report problems with the registry.
3.2.1 What is Available There?
The EIDR Support Site is the location of the EIDR Help Desk and Public Forums. It can be should be used for:

- Requesting Access Credentials
  - EIDR Project Management Site (Basecamp)
  - EIDR Registry Credentials (Sandbox & Production)
- Request records to be added
- Request changes to EIDR records
- Reporting outages in the registry service
- Reporting Bugs in the Registry
- Reporting quality issues with the data in the registry
- Receiving information and updates from EIDR on registry outages and maintenance windows
- Maintenance Windows and Announcements
- User Forums

3.2.2 How Do I Access It?
After signing the Agreement and the Contact Sheet, EIDR will create a new user for the designated Credential Contact. That contact will have access to the EIDR Support Site. The support site is located at [http://support.eidr.org](http://support.eidr.org).

The Credential Contact, can then make requests for additional users.

3.2.2.1 Additional Users
To add additional users at the EDIR Support Site find and press the “NEW” button at the top right of the page. You will now have the ability to create a New Help Desk Ticket. You can use the following example:

Requester: Your Name
CC: [EDIR Main Contact]
Subject: Account Creation: EIDR Support Access for [Member Company]
Status: New
Type: Task
Priority: Normal (typically)
Group: General registry (Ops/UI) Support
Assignee: EIDR Customer Support
Category: Other Request
Description: Put the names, phone numbers and e-mail addresses

3.2.3 What Are its Use Policies?
This information is confidential and is only for the use by the Member Company and its designees.
Only the person assigned as the Credential Contact for the Member Company will have the ability to request this access, as the EIDR organization only has that single point of contact as reference, unless otherwise specified by the main Credential Contact of the Member Company.

The Credential Contact of the Member Company may designate this responsibility, or add others who can also act in this capacity, but it is the single contact that will initiate and be responsible for the changes.

This is to ensure that only the Member Company assigned designees have access to the EIDR systems.

3.3 EIDR Project Management Site (Basecamp)
Basecamp is a project management portal that is open to use by the EIDR members for posting and sharing of documentation for POCs and other EIDR efforts.

3.3.1 What is Available There?
All the documents, polices, schedules etc. that are used and shared as part of the POC will be housed on the Basecamp site.

This is the storage locker for the EIDR POC, a place where all shared fields can be stored for all member of the POC to use.

3.3.2 How Do I Access It?
As a new member an after an EDIR POC is initiated, portal access will be granted. When a POC is started with the Member Company, a Basecamp project will be established by EIDR.

The Member Company will then make a request for specific individuals to be grated access to the Basecamp POC Project. The Member Company will use the EIDR Support Site http://support.eidr.org (as described in section 2.2 above) to request the access to Basecamp.

NOTE: Only the person assigned as the Credential contact for the Member Company will have the ability to request this access, as the EIDR organization only has that single point of contact as reference, unless otherwise specified by the main Credential Contact of the Member Company.

Here is the information required for the request:

Requester: Your Name
Subject: Account Creation: Basecamp Access for [Member Company] POC
Status: New
Type: Task
Priority: Normal (typically)
NOTE: This is the process for Basecamp access only, and not general support requests to the EIDR registry.

Once the request is made, access is granted and credentials e-mailed, the following are the steps to access Basecamp:

1. Navigate to the following e-mail address: https://eidr.basecamphq.com/login
2. Enter Assigned Username and Password
3. This will bring you to the EIDR Project Management Portal
4. The Portal will show you Project Folders that your Member Company has access to for which you can download or upload documents based on the needs to the POC or other EIDR specific project.
5. You can highlight and click through to the specific docs by selecting the applicable project/company folder.
6. You will then be on the project overview & activity page, which show you all the documents uploaded, when and by who.

TO DOWNLOAD:
1. To download any document in the project folder, just highlight and click, the document should download immediately.

TO UPLOAD:
1. You have the option of adding a new message to the project page, adding a to-do, adding a new event or a new file.
2. Those selections are across the top of the, click though, select a file, name it and upload it per instructions on the site.

3.3.3 What Are its Use Policies?
All registered users of EIDR and its POCs may use the material for which they are granted access. All material should be kept confidential regardless of access, as some efforts are not yet public.

The Credential Contact described above controls access for individual companies. The Credential Contact must make changes to approved access for all new user and current users via Zendesk.
3.4 The Registries
EIDR is made up of two registries each with its own outwardly facing UI interface; Production and Sandbox. Both registries have public sections and search as well as credential only access.

The User Interface is identical between the two registries, so it is important that you are using the correct one for the work you are doing.

You can look at the URL or the lower right hand section of the screen to see the registry and version you are currently viewing.

The example below shows that this is the Sandbox registry. See below circled in red.

![Figure 1: Registry Information](image_url)

3.4.1 Access

3.4.1.1 Production
The Production system is the official site, where all officially registers titles, and EIDR numbers exist.

Currently the EIDR Registry is available for public access/search at [https://ui.eidr.org/](https://ui.eidr.org/). You can search and view currently registered titles, see EIDR numbers of registered titles, and other metadata needed for uniqueness.

The publically accessible website has a log in, search options, and link to join EIDR. The log in selection will be described below in member access section.

3.4.1.2 Sandbox
The Sandbox is a development and test site where you can search and new members can start their practice registration efforts. This is not the NOT the official data, and
the EIDR numbers do not necessarily reflect a fully 1:1 mapping of the Production system.

You should not assume that the records from the Sandbox are correct/official due to the transient nature of some of the data. In addition the Sandbox system is often wiped clean and backed up with a copy of the production system as a new starting stop. All practice efforts and corresponding EIDRs will be deleted.

Notification of such Sandbox refreshes will be sent out to the members, and posted on the EIDR Support Site (Zendesk)

Currently the EIDR Sandbox Registry is available for public access/search at https://sandboxui.eidr.org. You can search and view currently registered titles, see EIDR numbers of registered titles, and other metadata needed for uniqueness.

The publically accessible website has a log in, search options, and link to join EIDR. The log in selection will be described below in member access section.

3.4.2 Public Services
As far as the public access to the registry, while the UI is navigable, only the public search capabilities are available without credentials, for both the Production and Sandbox systems.

3.4.2.1 Public Search
General search, for both Production and Sandbox, requires no credentials, and allows one to search by EIDR Lookup, or a full search of required EIDR fields.

The search selection button is under the EIDR logo in the upper left portion of the screen. When selected you are taken to a search screen with two tabs; basic and Advanced.

3.4.2.1.1 Basic Search Tab
Basic search enables you to search by the following:
- Title (exact match and/or to search by alternate titles)
- Description
- Referent type
- Registrant
- Publication Status
- Release Date (from or to)
- Principle Agent
- Principle Agent Role

You can input one of all of the fields to help refine your search. The more fields you fill in the smaller the pool of search returns.
3.4.2.1.2 Advance Search

Advanced Search enables more fields, they are (additive to the above list):

- EDIR 
- Structural Type
- Mode
- Country of Origin
- Director
- Actor
- Primary Language
- Language Manifestation
- Approximate Length (from and to)
- Last Modified (from and to)
- Created Date (from and to)
- Publication Status
- Inheritance Relationships
- Registrant Extras
- Backup Contact
- Current Asset Holder
- Lightweight Relationships

You can input one of all of the fields to help refine your search. The more fields you fill in the smaller the pool of search returns.
3.4.2.1.1 Look Up EIDR Number

The Search by EIDR # (Lookup EIDR #) is located in the top right portion of the screen, and will accept a full EIDR number and provide back details of the record.

![Advanced Search Options Screen](image)
3.4.2.1 Member Services

Member services are ones that require a password and log in access to the Production and Sandbox systems. One you have that access you will be able to use the following options.

- Search (discussed above)
- Create
- Account
- Support

3.4.2.2 Create

After Search, the next selection button take you to the create screen. See below.

The Create screen allows for the creation of individual EIDR records either a Root Objects, of Child Objects.
• Root Objects
  o Series
  o TV Program
  o Movie
  o Web
  o Short

• Child Objects
  o Season
  o Episode
  o Edit
  o Language Variant
  o Encoding

Each choice will take you to a data entry screen for that corresponding selection. Each selection has a different level/amount of required and optional data fields, that must be filled in to be able to create a record.

Please note the more data that is input, beyond the required will allow for more granular review for duplicates

3.4.2.3 Account
The Account screen allows members who are signed in to access account information specifically status of Tokens, User Generated Transactions, and Registrant Requested Transactions.

Select the Account button, then the highlighted “Status Lookup” link. See Figure 5 below.

Figure 6: Members Account Info Screen

You will now be on a Status Lookup page, that provides to the options for the following:
Token Status Lookup
Allows for individual status of Tokens Provided. Input Token number on provided line and press Lookup button.

User Status Lookup
Allows the user to lookup transactions initiated by the specific user. You can lookup by:
- Success
- Duplicate
- Pending
- Authorization Error
- Validation Error
- Other Error

Registrant Status Lookup
Allows the user to lookup transactions initiated by the specific registrant. You can lookup by:
- Success
- Duplicate
- Pending
- Authorization Error
- Validation Error
- Other Error

Figure 7: Status Lookup Screen - Account
3.4.2.4 Support

The support selection allows a portal to the EIDR Support network, and provides some high level definition of the types of support provided.

On the right-hand portion of the screen is a data entry section that allows you to ask a question of the Support team.

Figure 8: Members Support Request Screen
Appendix A: Sample Member Organization Profile.

This will be provided to the new Member Company to define the contacts for the different roles in EIDR. Specifically from the user access standpoint this document captures the “Credential Contact” who is responsible for defining and approving all new Member Company credentials.

<table>
<thead>
<tr>
<th>Member Organization Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Company Name:</strong></td>
</tr>
<tr>
<td><strong>Primary Contact (Name/Title):</strong></td>
</tr>
<tr>
<td><strong>Email Distribution Lists:</strong></td>
</tr>
<tr>
<td>Technical Working Group</td>
</tr>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>No</td>
</tr>
<tr>
<td>No</td>
</tr>
</tbody>
</table>

| **Secondary Contact (Name/Title):** |
| **Email Distribution Lists:** |
| Technical Working Group | POC Working Group | Marketing & Business Working Group |
| Yes | No | No |
| No | Yes | No |
| No | No | Yes |
| **Credential Contact**  
| (Name/Title): |
| Contact Email: |
| Contact Telephone Number: |
| Contact Fax Number: |

* Contact that can be reached for approval when colleagues within your organization request access to EIDR for the registry, etc.