



CAENTI
Coordination Action of the European Network of Territorial Intelligence
A project funded under FP6 of the E.U.
<http://www.territorial-intelligence.eu>



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Coordination Action of the European Network of Territorial Intelligence

“CATALYSE Toolkit”

European contents specifications of an online territorial repertory of services

Deliverable N° 52

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February 2007, 15th

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Introduction

The European guide of the services repertory is the second tool of the CATALYSE Toolkit, which is integrated in the work package 6 “Tools for actors” of CAENTI. Its design follows the methodology which was implemented in this activity.

The European diagnosis and evaluation guide that is presented here results from the cooperative research work of the universities and territorial actors gathered within the CAENTI project, funded by the 6th research framework-programme of the European Union. The objective of this project is to offer to the territorial actors useful tools to understand the complexity and the diversity of the individual situations in order to work out, to manage and to value multi-sectors projects that respect sustainable development.

The actors and universities that are partners of the CAENTI consortium suggested making a synthesis of their experiments, to offer it to the actors who want to better know their territory resources (services, actions, projects) in order to better answer their users’ expectations.

This synthesis allowed drafting a European guide of the services repertory, which gathers the commons indicators they usually use.

This contribution is a first proposal, which remains to be debated according to the uses differences. They are basic specifications, that should now be completed by definitions and treatments protocols and which should be instrumented, as it is planned in the CAENTI project. It is the first step of a harmonization effort, which result remains to be tested.

This repertory allows identifying and describing the structures, services and actions of territorial development and publishing these information under the form of an online repertory, on paper and on digital supports.

This repertory objective, in the Catalyse method, is at the same time pragmatic and strategic:

The actors of a territory should be able to contact a resource-person, who intervenes on a specific problematic, so as to answer a need or a series of needs, during interventions with users. At that moment, it is necessary to be able to take inventory of the available services and actions so to concretely contact the service, the action, consequently the organization and the referent person(s).

For the project planner, who animates a Catalyse observatory, the repertory is also a support (a tool) to concretise the partnership: the information gathering implies many contacts between partners, and it is felt as a common objective. Thus, it allows mobilising the network on the execution of a shared directory in which there is every one, and above, every one recognizes. Consequently, it is a collective expression that consolidates the relationships between partners, also by involving them from the methodological point of view (in particular by associating them to the contents design), and from the technical point of view (manipulation logic of a shared tool to be adapted according to the needs). The data that are gathered in the course of time, and that are updated in a reliable and continuous way, should be presented in periodic analyses.

Jean-Jacques GIRARDOT develops this point:

“Independently from the daily use of individualised information, the repertory data can be globalised at the scale of an intervention field or of a territory to produce quantitative balances and qualitative analyses. These analyses that describe the services and activities offer of the actions can be compared to the individual needs that are expressed by the users, gathered with the diagnosis and evaluation tools. Thus, we can contemplate to put in relation an individual needs profile and the appropriate services and activities. It is also possible to compare the set of

expressed needs and the offered allowances, to identify the non-satisfied needs, as regards quality and quantity, and to value the actions relevance and coherence”.

(GIRARDOT Jean-Jacques, 2000c : "Principes, Méthodes et Outils d'Intelligence Territoriale : Evaluation participative et Observation Coopérative", in : Conhecer melhor para agir melhor, séminaire européen de la Direction Générale de l'Action Sociale du Portugal, Evora-mai 2000, DGAS, Lisbonne)

A typology of actors and actions can be made and compared with the typology of the users' needs to deduce the missing actions or to study the coherence of local development device.

These specifications aim at giving the orientations the final produce should follow ; then a functional analysis will have to take place so as to traduce this outlook in tangible and executable data-processing elements.

Here, we will evoke:

- the repertory conceptual analysis
- the desirable browsing scenarios
- the conceivable management procedures
- the contents the form will have to manage
- the meta-data that will be associated

From these specifications in this state, the conclusion will allow suggesting an organisation to make the data-processing programming of this tool.

The proposal of European form is presented later.

It is the result of a synthesis and consensus process, which will be presented and made explicit in the chapter “Form contents”.

Conceptual analysis

This repertory is articulated in relation with the form that organises the contents that will be described later. The contents management implies a data-processing interface, which should structure a general procedure that is shared in detailed tasks that are focused on the user.

The conceptual analysis of this kind of tool should allow identifying these points:

The introduction allowed defining the **contextual** outlines of the implementation of a services repertory within a Catalyse observatory, as specified in the CAENTI, which particularly integrates the role of this tool in territorial intelligence.

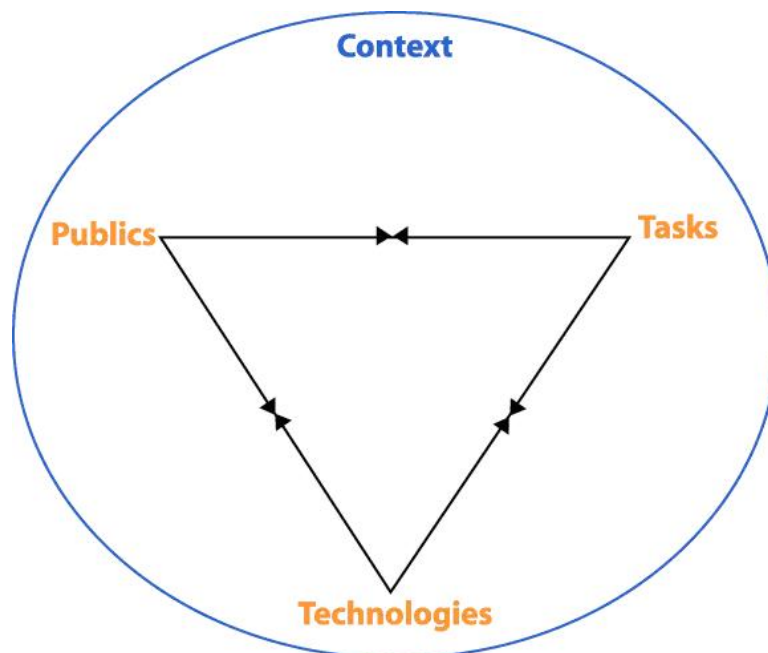


Diagramme 1: Conceptual analysis

Concerned publics

The **publics** that are concerned by this repertory are mainly:

- The users, so as to easily and quickly find a service that answer a precise need, according to their particular situation, and to their mobility possibility (a service in adequacy with their demand and their profile should also be available, possible to contact, and geographically accessible for a smallest cost).
- The first line actors that can thus know the services offer of their territory and valueate their proposal in the available set: they accede to a tool that allows in real time directing the users towards other services too. The objective is to coordinate and harmonise a taking responsibility according to a global approach of the users' needs. Their first task it to describe themselves so as to be present in this repertory: on that account, they are not mere visitors of the repertory, but also contributors.
- The second line actors that use the repertory as the previous ones, and lead an analysis of the quantitative and qualitative data that allow concretely valuating the existing services, the emerging needs, the implemented actions, etc.

- The managers are taken into account as users of the repertory insofar as they regularly intervene in the putting online case:
 - o Content: has the responsibility of the data basis, contents validation, its integrity, its coherence, its perennality, but also its protection, consequently of the restoring procedures.
 - o Server and network: should guarantee the server functioning, internal and external accesses to the network, the maintenance of all the elements, and even of the software that are settled on the server.

Necessary functions

The **tasks** to be developed should correspond to these definitions:

- access to the information that is online, in a paper version, or on any digital support
- high capable, didactic and structured search engine
- choice in an answers list so as to accede to the detail of a service information
- safeguard and printing of the results as in the documentation centers
- adding of a service form, according to an established and secured procedure
- modification and updating of a service form, according to a planned, secured procedure, which allows managing the validation steps
- suppression of a service form, according to a planned, secured procedure, which allows cancelling the destruction operation by the file deactivation
- any management and maintenance operation of the base: validation procedures for adding, modification, updating and suppression; safeguard procedures, procedures of data-processing optimisation of the data-basis
- the interface should take into account the communicational criteria of the site that hosts the repertory and of the editorial charter of the organization that is responsible for this tool (communication objectives and intents, specific vocabulary, language level, and stage direction, graphic outlines)
- the interface should answer the most classical ergonomics criteria (see Bastien et Scapin, 1993. « Ergonomic Criteria for the Evaluation of Human-Computer interfaces », Institut National de recherche en informatique et en automatique, France)

Advisable technologies

The used **technologies**:

- will naturally appeal to a data bases management system (DBMS).
- Several examples were made on the base of the FileMaker Pro™ DBMS, they use the CDML (Claris Dynamic Markup Language) dynamic language. The technologies evolution presently allows designing a system that is managed by the PHP-SQL couple, which is broadly spread and that is robust, and besides that has the advantage of being free.
- The technical specifications will have to organise a functional analysis that will allow giving a data-processing to these points.
- It is possible to contemplate other technologies, for example the methods that are inspired of the Web 2.0: Toolkit Dojo (Ajax / DHTML), Framework MVC... We will also have to establish a state of the available, reliable and accompanied by important users communities technologies before choosing what will seem to better answer our expectations.
- The technical constraints are linked to the Catalyse method philosophy:
 - Tools robustness,
 - Gratuitousness,

- Simplicity of use and updating (data-processing maintenance),
- Quality and adapted to diverse publics documentations,
- Documentation of the source code,
- Produce evolutiveness and cross-platform nature (in contents as in technologies).

Systemic approach

Reciprocal **influences** are visible on the previous diagram; for example, from "publics" pole an arrow joints up with another arrow that comes from the « tasks » pole. The identified needs allow a first estimation of the tasks the produce will have to make possible, executable. As a system of seek for adequacy offer-demand, if a public need to push in a nail, it will be necessary to offer a tool that allows making the asked action. The work of publics' needs analysis lead to a clear and structured list of the actions the produce of the accomplished project will have to allow. Consequently, it will influence the tasks determination.

It will also have a notable importance in the choice of the technologies that will be implemented (other arrow towards the "technologies" pole): according to the motivations, but also of the professional, individual competences, as well as the target publics appetencies, the system will have to give a certain level of online assistance, or on the contrary a thought and necessary complexity in the reflexive progression that allows the decision-making... whilst respecting the abilities of the different discriminated publics.

The above diagram aims at underlining the fact each of the poles has an influence on the other ones, which has to be valuated so as to stay in a systemic outlook, what is a success guarantee. Our analysis takes it into account, in the limits that are presently reached by the specifications drafting.

Browsing scenarios

A services repertory ergonomics is very important. Its objective is to guarantee an interface that would offer a practical use, a minimal learning time, and that is consistent on the whole website.

As a consequence, we will have to plan the online and outline repertory design is able to adapt to the pre-existing graphical outlines.

A good ergonomics should take into account the users' working habits and the material they mostly use. The final objective is to guarantee the software better possible usability, by improving the browsing, the research, the key-in and the data treatments.

The browsing and the access to a website data can be made in several ways; each of them has its own logic, its advantages and its disadvantages. Some ergonomics precise rules should be respected to reach a good browsing system (for example, not overcoming a threshold of three clicks before reaching the searched content); nevertheless, whilst respecting these basic rules of the web browsing, many different browsing plans can be created for a same Internet website. Then, the users' affinity for a browsing logic or another one is linked to many parameters that are more or less subjective, such as their own browsing habits on their favourite websites.

A browsing scenario that could be functional for the greatest number of people can be a difficult to implement exercise. It is all the more difficult for a site as it specially wants to be the user interface of a data basis.

The following proposals are illustrated by the example of the online actors' repertory of the "Odina" Catalyse observatory, in Asturias (Spain, <http://www.odina.info/>), which was implemented in 2001 and then regularly updated.

The general diagram of browsing organisation is the following one:

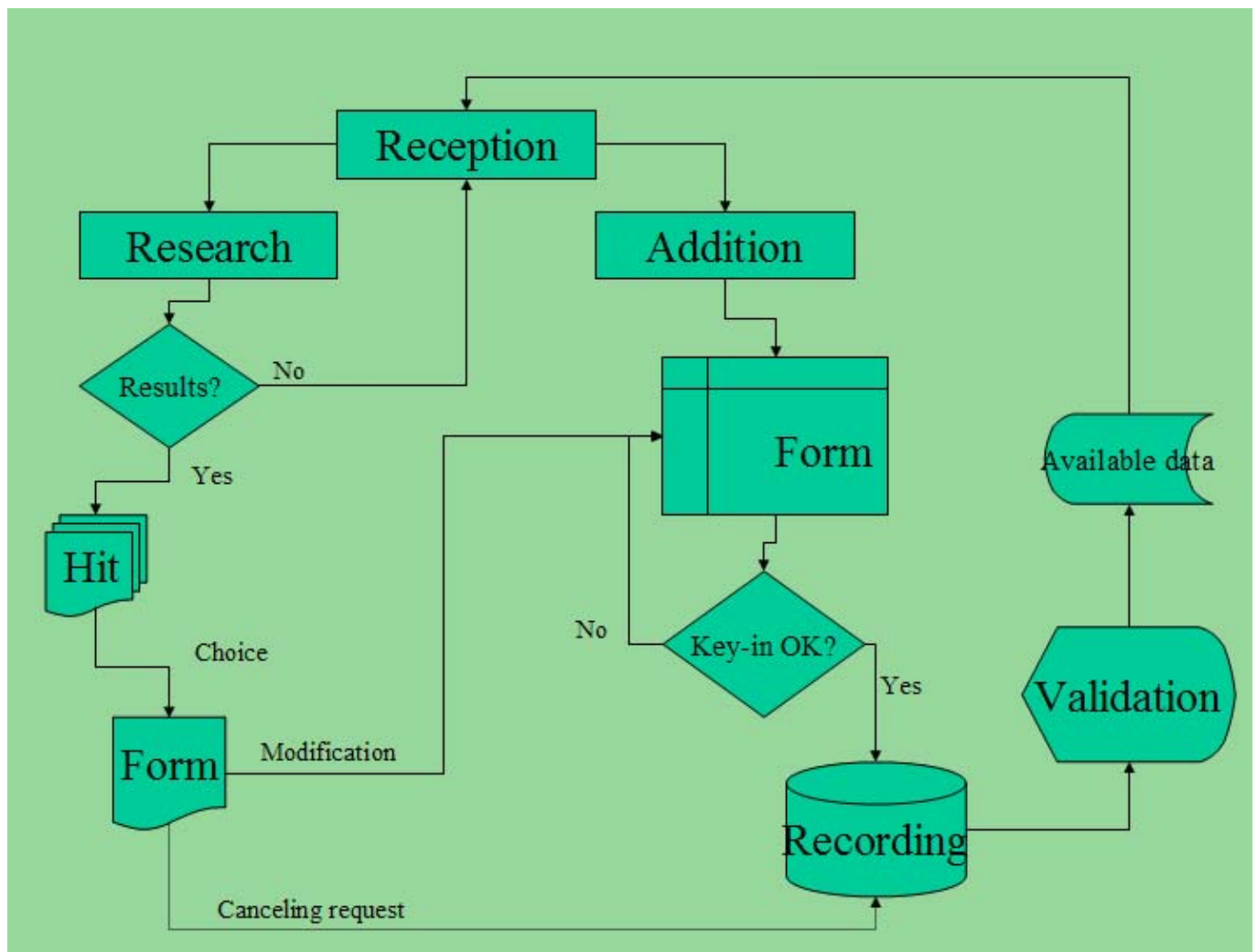


Diagramme 2: General browsing diagramme

Research engine

From the repertory welcoming page, two actions are possible:

- starting a research in the data basis,
- or adding a description form of a service.

As written in the tasks analysis, the data access is organised by a specific search engine. We will study then the possibility to make adding.

The multi-criteria **research** gives the possibility to make a research on several headings, we planned here, although it will be possible to give the possibility to parameter its contents during the system programming:

- organization name,
- its first letter,
- name of the main contact,
- received public(s),
- activity fields,
- offered service(s).

Observatorio Socio-Económico Permanente de la Inmigración en Asturias

anadir mostrar todo Buscar Busqueda avanzada

NOTICIAS
• Noticias

ODINA
• Presentación institucional
• Presentación general del Proyecto
• Miembros
• Talleres
• Acciones

OBSERVATORIO
• Metodología y herramientas
• Diagnostico territorial
• Repertorio de Actores y Acciones
• Estadísticas y mapas
• Documentación

ESPACIO INTERCULTURAL
• Espacio intercultural

FORO
• Foro

ENLACES
• Enlaces

Odina > Repertorio de Actores y Acciones > Búsqueda

Introduzca sus criterios de búsqueda:
(en estas listas es posible efectuar varias selecciones a la vez tecleando "Ctrl" o "manzana" en Macintosh)

Organismo: Contiene

Siglas: Contiene

Contacto: Contiene

Público: Todos los públicos
Hombres
Mujeres

Actividad: Acción social
Salud
Vivienda

Servicios: ACCIÓN SOCIAL
Acceso al Ingreso Mínimo de Inserción (IMI)
Ayudas económicas para alimentos

Mostrar: 10 registros por páginas.

Buscar Borrar

Diagramme 3: Odina, Actors and actions repertory, research

Research results

This research procedure gives as **results** a list of found forms (what we call "hit" in technical language) that corresponds to the asked criteria. This list includes the elements that are necessary to contact the organization, as schedule, so as not to surcharge the result screen, nor to give unuseful information to the users. Nevertheless, it should answer an immediate and operative need, as providing the phone number of a specific service.

At that moment, the user can:

- visualise one of the forms by clicking on the form identifying element
- go back to the research form to give details on his request
- go back to the request form to start a new one

Observatorio Socio-Económico Permanente de la Inmigración en Asturias

anadir mostrar todo Buscar Buscar Busqueda avanzada

Odina > Repertorio de Actores y Acciones

Visualización de 1 a 25 entre 78 las fichas encontradas (25 affichées). Pulsar sobre el enlace subrayado para visualizar la ficha.

Nombre	Siglas	Contacto	E-Mail	Teléfono
ALBERGUE COVADONGA	A.C.	Julia Castro	alb_covadonga@teleline.es	985 35 84 34
ASAMBLEA LOCAL CRUZ ROJA ESPAÑOLA DE GIJÓN	C.R.E. - GIJÓN	Emilia Saez Martínez		985 31 93 13
ASOCIACIÓN ALBÉNIZ		Ignacio Bujanda de la Fuente	albenizdia@terra.es	985 11 65 79
ASOCIACIÓN ALBÉNIZ		Eva Garcia Arias	albenizdia@terra.es	985 35 61 84
Asociación Comisión Católica Española de Migración	ACCEM-Asturias (sede Gijón).	Marisa Martínez González	accem@fade.es	985 16 56 77
Asociación Proinmigrantes INTERVALO			asocintervalo@hotmail.com	619924333
ASOCIACIÓN RIQUIRRAQUE		Ana Isabel González Cortina	rrrq @ arrakis.es	985 16 46 12
ASTURIAS ACOGE		Pilar Quintana	astacoge@premiernet.com	985 20 39 92

Diagramme 4 : Odina, Actors and actions repertory, research results

The brief resources list allows at the same time having a global vision of the available offer without entering in the details too much, the inherent idea is that if it is possible to immediately get the relevant information, the Internet user does not need to continue to get information of directory-kind (phone number, email). A click on one of the answers will allow getting the detailed form of the concerned organization, with the physical address, the indications that come from the classification thesaurus, the intervention area, etc.

If a research action gets nowhere that is to say if it does not give any result, it is necessary to be careful to the way the situation will be managed. Indeed, many users react as if they were guilty for having made a mistake. In this case, the repertory is considered as an accuser that obliges the other ones to face their incapacity. Consequently, the formulation of the information “no result” should be modified, thought according to the users, to reduce the potential emotional implication, and at the same time it is indispensable to guide the users in a professional way, through a pedagogic accompaniment. The scenario of the online assistance presently remains to be developed, above all in its detailed setting, so as it is adapted to the various users’ profiles.

Visualisation of a service

Choosing one of the answers (by a click on its line in the results line) will make appear the detail of the chosen form, which includes all the gathered information (see form specifications infra).

This **visualisation** should allow:

- consulting the whole concerned form or a part of it: on this point, we recommend to allow the contents administrator setting the system so as to choose between:
 - o consultation of the whole form
 - o consultation of the form in two steps: synthesis of the information that only include the headings that were used as research criteria, and then access to the whole form through a link like "whole form" or "continuation".
- Coming back to the results list, so as to make another choice, or to precise the research, or to come back to the search engine to make a new one.

The screenshot shows the 'Odina' website interface. At the top, there is a header with the logo and the title 'Observatorio Socio-Económico Permanente de la Inmigración en Asturias'. Below the header is a navigation bar with options like 'añadir', 'mostrar todo', and a search box with a 'Buscar' button. The main content area is titled 'Odina > Repertorio de Actores y Acciones' and features a 'Ficha completa' (Full Record) for an organization. The organization's details are as follows:

Organismo	
Siglas	ACCEM-Asturias (sede Gijón).
Nombre completo	Asociación Comisión Católica Española de Migración
Servicio	
Dirección	Av. El Llano 27, Esq. León XIII, Bajo-posterior,
Código postal	33209
Municipio	Gijón
Provincia	Asturias
Comunidad Autónoma	Asturias
País	España
Teléfono	985 16 56 77
Fax	985 99 07 53
E-mail	accem@fade.es
Página web	www.accem.es
Responsable y Contactos	
Apellidos del responsable 1	Fernández Quintanilla
Nombre del responsable 1	Julia
Cargo del responsable 1	Directora ACCEM (nacional)
Apellidos del responsable 2	Mahía Cordero
Nombre del responsable 2	Fco. Javier
Cargo del responsable 2	Director ACCEM-Asturias
Apellidos del contacto	Martínez González
Nombre del contacto1	Marisa
Cargo del contacto	Responsable Area Social ACCEM-Asturias
Apellidos de contacto 2	Palacio Torre
Nombre de contacto 2	Raquel
Función del contacto 2	Responsable Area de Voluntariado
Apellidos del contacto 3	Pérez García
Nombre del contacto 3	Susana
Cargo del contacto 3	Responsable Area Formación y Empleo.

Diagramme 5 : Odina, Actors and actions repertory, detail of a form

Here, we see the detail level that is chosen as regards the information of the people who are members of an organization: the actors often deplore only having a phone number, without genuinely knowing whom they should contact. However, social work is based on human relationships: as a consequence, the information personification is important.

Other side of the coin: the information quality depends on its updating; consequently, this information level implies constant updating, according to an informational intelligence system that is often new for this kind of associations. On the contrary, the advantages are:

- this updating necessity implies regular relationships with the partners, what is excellent to develop the partnership, consolidate it, widen and consolidate the network, and consequently the observatory life in general.
- a services repertory design integrated information updating procedures which are online and accessible to the partners, by means of a data validation system by a contents administrator. Thus, we develop the partners' skills, as consequently the territories, in the handling of the technologies which are linked to Internet...

Descriptivo	
Actividad de la entidad: Descripción	ONG Información Acompañamiento
Ámbito de acción	Acción social Formacion y empleo Educación Alojamiento
Otros ámbitos	
Servicios propuestos	Actividades de sensibilización a la comunidad Elaboración de estudios e investigaciones sociales Acompañamiento y mediación socio-sanitaria Alojamiento en pisos de acogida para refugiados Alojamientos en pisos de acogida a inmigrantes Apoyo escolar Acompañamientos sociales a la infancia Español para inmigrantes Formación socio-educativa para inmigrantes Formación para el empleo Talleres de pre-formación laboral Elaboración y evaluación de competencias socio-profesionales Información, orientación y asesoramiento socio-laboral Diseño de itinerarios de inserción socio-laboral Acompañamiento en la búsqueda de empleo Mediación e intermediación laboral Bolsa de empleo Telecentros para el empleo
Otros servicios	
Públicos	Inmigrantes Refugiad@s Desplazad@s Solicitantes de asilo
Otros públicos	
Modalidades de acceso:	<input checked="" type="checkbox"/> Iniciativa propia <input checked="" type="checkbox"/> Contacto telefónico <input checked="" type="checkbox"/> Cita previa <input checked="" type="checkbox"/> Derivación de otra institución <input type="checkbox"/> Comisión de admisión <input type="checkbox"/> Otras
Zona de intervención	<input type="checkbox"/> No existe zona definida <input checked="" type="checkbox"/> Barrio <input type="checkbox"/> Zona de trabajo social /sanitaria/ empleo <input checked="" type="checkbox"/> Municipio(s) <input type="checkbox"/> Provincia <input checked="" type="checkbox"/> Comunidad autónoma <input type="checkbox"/> Otras

Diagramme 6: Odina, Actors and actions repertory, detail continuation

The information quality will also depend on the chosen definition criteria. Knowing what are the publics that are welcomed/received by a service allows directing a user in real time, for example during an interview.

Adding of a service

To add a form in these repertories, we should key-in information in an online file. We get to this form from all the pages that are used to browse in this data basis by a specific and explicit link that is in the header or in the footer (see example below).

The screenshot shows the website interface for the 'Observatorio Socio-Económico Permanente de la Inmigración en Asturias'. The main navigation bar includes 'anadir', 'mostrar todo', 'Buscar', and 'Busqueda avanzada'. The left sidebar contains menu items for 'NOTICIAS', 'ODINA', 'OBSERVATORIO', 'ESPACIO INTERCULTURAL', 'FORO', and 'ENLACES'. The main content area is titled 'Odina > Repertorio de Actores y Acciones > Añadir' and contains the following text: 'Usted añadirá una ficha a la base de datos. Rellene las informaciones siguientes: Los campos marcados con un * tienen que rellenarse obligatoriamente.' Below this is a form with the following fields:

Organismo	
Siglas	<input type="text"/>
Nombre completo	<input type="text"/>
Servicio:	<input type="text"/>
Dirección	<input type="text"/>
Código postal	<input type="text"/>
Municipio	<input type="text"/>
Provincia	<input type="text"/>
Comunidad Autónoma	<input type="text"/>
País	<input type="text"/>
Teléfono	<input type="text"/>
Fax	<input type="text"/>
E-mail	<input type="text"/>
Página web	<input type="text"/>
Responsables	
Apellidos del Responsable 1	<input type="text"/>

Diagramme 7: Odina, Actors and actions repertory, adding (extract)

The procedure can be described as follows: (see general diagramme):

- request for adding (click on button and/or link)
- fill-in of a blank form
- validation by the transmitter of the keyed-in form (kind of "publication order")
- automatic verification (by the data-processing system) of the indispensable and controlled headings (the settings should be made by the contents administrator)
- if there are problems with the key-in, go back to the form that is being keyed-in, corrections, and new validation ; loop until the passage to the next step
- if there is no problem with the key-in, the responsible for the form receives a notification mail with the keyed-in information, for filing, histories, confirmation.
- At that point, the form is pending until the validation by the contents administrator. This step should be optional in the system and able to be set by the contents administrator.
- after validation, the form is available online, active to be consulted, printed, etc.

- if the form is not validated, a contact is established between the contents administrator and the form referent so as to check the information, which are corrected and put online.

This procedure implies a rigorous management of errors, as evoked in for the search engine. It is at the same time disappointing and destructuring for a territorial actor to be “blocked” by a system that does not accept to register a form without explaining why in an intelligible and non brutal way. The pedagogic online assistance is also crucial here.

The management of the keyed-in form modifications also shows the need to implement a management of the users’ profiles, by the attribution of a specific account that answers the administration needs. It is a step the functional analysis will have to lead.

Updating of an existing service

The **updating** of a form data is possible from the form itself, by a button "Modify" that is located after the various headings. Clicking on this button sends the user to a similar form to the adding of visualisation one, but which headings (text fields and buttons) include the form information, and can be modified.

After having made the corrections, a button "Validate" allows validating the form, what is technically equivalent to reflect the modifications in the data basis.

Here, we will follow the same procedure as previously, with an important damper: the repertory gives the possibility not to modify the original form in real time.

Thus, when a user will modify a form, and although he is connected, the procedure will be modified like this:

- the system creates a copy of the original form
- the user modifies the copy
- then there are the validation steps
- during the validation by the contents administrator, the repertory automatically searches the other copies of this form (it can be modified several times, consequently several copies were created)
- the repertory automatically eliminates them
- the it looks for the original form, it archives it by deactivating it so as to keep a trace of the ulterior version

Consequently, it is a parameter the contents administrator will active or not according to the partnership specific needs. This procedure indicates it will be important for the contents administrator to regularly make cleanings of the repertory archives.

Suppression of an existing service

The above procedure shows a part of the suppressions is automatically made. Nevertheless, we still have to management the archive suppression, and some suppressions requests.

A form suppression is never made online. It can be requested by a user, online, but for reasons of information reliability and data coherence, a form can only be suppressed by the contents administrator of the data basis.

A user can « deactivate » a form, that is to say demand to the information system not to publish it any more on Internet; thus there is still the form in the data-processing form, and it can be published again in case of error (or after a correction, a verification...), or it can be suppressed by the administrator, if necessary.

This procedure allows managing an information temporality, which has interest according to the current events that are naturally changing: a service can either not exist any more, or not interesting a partnership

and consequently be deactivated, to be activated again later because the service is relaunched or is interesting again in a new context.

Contents management procedures

The contents administrator is in charge of the important tasks that require a high level of responsibility on the repertory. He should at the same time **manage** the *data*, the *users*, and **analyse** the *data* as their *use*.

Data management

Here, the issue is to manage the data bases from a technical point of view that is linked to the contents, and to follow the contents management procedures we studied above.

The administrator is in charge of the actions of:

- data bases management:
 - protection of the data bases according to the classic, secured, well-tried data-processing procedures
 - management of these protections: organisation, decentralised copy
- data contents management:
 - data coherence: double verification, regular evaluations of the CDM and of the LDM
 - filing of the data we requested the suppression to guarantee their ulterior accessibility
 - data cleaning by effective, physical suppression of the concerned forms
- general data control
- control of a form that is submitted for validation
- possible corrections, consequently verification with the transmitter
- suppressions management, after verification
- definitive validation: publication on paper and/or on Internet

Users management

The general public can visualise the published data, without any specific connexion procedure.

On the contrary, the actions of adding, modification, or request of suppression are submitted to a procedure of connexion to the repertory, so as to guarantee their quality.

The administrator is in charge of:

- the users creation
- their rights management,
- the accesses management (in relation with the ergonomic recommendations)
- the management of the repertory use statistics (visits, consulted pages, made actions, origin, typical itinerary...)

Analysis of the data and of their use

As we explained in the introduction, this repertory interest is that it can be analysed from a statistical point of view:

A typology of actors and actions can be made and compared with the typology of the users' needs to as to deduce the missing actions or to study the coherence of the local development device.

The administrator is in charge of:

- the exploitation of the repertory use statistics (visits, consulted pages, made actions, origin, typical itinerary...), in relation with the existing users profiles
- the execution and exploitation of the qualitative et quantitative statistical analyses of the present elements (objectives, process, technical execution)

The issue is to export the elements of the data bases, to structure, control and then import them in the Pragma software. A quantitative balance can be generated and then exploited so as to draft a data analysis that includes a factorial analysis of correspondences (FAC) as well as a hierarchic ascendant classification (HAC). The first point should allow valuating the repertory uses, including at the indicators level (for example the most used, the less searched...), in order to improve the accessibility as well as the contents. The browsing we contemplated above take advantage of these evaluations to be refined too.

A strategic management

It requires a good control of the users profiles, of the stocked data, which allow this regular management of the data.

The understanding of the principle of the system functioning is also essential to be able to guarantee a quick diagnosis of the possible problems that are reported by the users. Indeed, the administrator will be the referent person of the system for the users. Then, he should redirect the problem towards the person who is in charge of the maintenance if he is not able to solve the problem by himself. The understanding of the system functioning allows guaranteeing a proper “error report” between the persons (we should notice that it is possible the administrator and the responsible of the software maintenance are the same person, what makes the competences sharing much more simple).

Lastly, we should notice the **strategic role** of this administrator in the partnership mobilisation: he will regularly need to contact a partner so as to check the information that are at his disposal, or to solicit a missing element, before the validation. This procedure makes him one of the main characters of the actors network animation, what should be taken into account in the professional profile of the person who is in charge of this task.

Form contents

Design method

The design of the European guide of the services repertory is the result of a synthesis and consensus process. From the actors experiments, it was possible to make an inventory of the used repertories, outline and online: guides (form and contents), putting online, publications on paper, on Cd-rom, browsing diagrammes, and uses.

We worked from the repertories that were used by:

- the observatory ODINA (www.odina.info, in Asturias, Spain)
- the observatory OPASI (in Sigüenza, Spain)
- the observatory OLE (in Huelva, Spain)
- the observatory OPTIMA (www.optima-obs.org, in Seraing, Belgium)
- the observatory INTEGRA Plus (www.integraplus.be, à Durbuy, Belgium)
- the PDD EXIGENCE (www.exigence.org, Equal, Besançon, France)

The selection of the big blocks that structure the information firstly made stable the repertory frame. We decided to use an information organization according to a logic of access to information, from the most administrative block to the one that includes the higher number of quantitative detail.

Then, a work of synthesis was led, by comparing the various existing guides, and by studying their use too.

This step led to a first formulation of indicators that benefited from a confrontation with the indicators that come from the work that was led on the CAENTI diagnosis and evaluation guide, also in the WP6C. This harmonisation of the contents is primordial in the logic of the Catalyse method: it is the structural condition that allows finalizing a systemic vision of a territory, by a compared analysis of data. Consequently, it is a quality guarantee of the suggested indicators.

From the data to the information

More precisely, the form is composed according to the following structure:

- Identity ("visiting card"): Who and where?
 - Name and contacts
 - Addresses
 - Responsible and persons to contact
 - Opening hours
 - Modalities and conditions of a user taking into care
 - Intervention place and mode
 - Status
- Welcomed publics: For whom?
 - Mail public principal : first or second line
 - List of the first line publics
 - List of the second line publics
- Activity: For whom?
 - Activity sector
 - Organization activities
 - Offered services
- Intervention area: Where?

- Intervention echelon and detail
- Participation to a network

This organization answers a concern of methodological and statistical coherence with the Catalyse method and consequently with the indicators that are developed in the diagnosis and evaluation guide.

Metadata

From the technical point of view, the form includes in the data basis other information that are necessary to the contents management, what is called metadata:

- identification of the form: as well as the data-processing key that is generated by the DBMS, it is particularly recommended to manage a code for each form, what allows keeping a link for the data management and above all during the quantitative and qualitative analyses.
- automatic variables, which are called synthesis variables: the objective is to be able to build an information from posterior answers, what saves some questions to the users. It is a possibility that is often useful to lighten the interfaces, what is useful in ergonomics. The functional rendering of this point will remain to be made.
- contents management: here, we should plan to keep the elements that allow deciding the informational and temporal value of the form. Consequently, we should keep data about:
 - the form creator
 - the responsible of a content,
 - the modifier(s),
 - and above all the status, the form state: validated by the transmitter, pending activation, published online, archived, to be suppressed...
 - creation date and hour
 - modification date and hour (the latest one is generally enough)
 - the connexion logs de connexion should be used here.

These elements are not presented in the form that is presented below, because they are transparent for the user who does not need to answer these automatised headings; they should be refined and implemented from a data-processing point of view after the functional analysis.

Conclusion

The repertory guide (below) and the specifications that are presented above result from a comparison and then a synthesis work and of several repertories that were experimented by actors that are CAENTI partners.

The specifications are a first state of the thinking that will be used as a frame, whilst remaining improvable, to draft functional requirements that will include CDM and LDM, as well as a data dictionary. This thinking has already been initiated.

In the prospect of the Catalyse toolkit, it will be important to take into account the position and the role the animation of a services repertory plays in the global communication plan as internal as external, which is strongly linked to the animation of a partnership network.

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EUROPEAN ON-LINE TERRITORIAL REPERTORY OF SERVICES

If your structure includes several specific services, please fill-in a form for each service (the name of the organization will be the same).

Date : |__|__|__|__|__|__|__|__|

IDENTITY

- [01] Name of the structure
- [02] Signa:
- [03] Service: [04] Signa:
- [05] Address:
- [06] Country:
- [07] Postal code: [08] Locality:
- [09] Phone: [10] Phone 2: [11] Fax:
- [12] E-mail: [13] Internet website:

Implantations of the structure

- [14] Address 1 :
- [15] Address 2 :
- [16] Address 3 :

Responsible :

[18] Surname and [19] name: [17] M^r.- M^s – M^{rs} [20] Function:

[21*n] Persons to contact (a person for each service)

Surname and Name	Function	Direct phone	Email
[21a] Ex: Doe John	Social worker	+33381665371	john.doe@soc.ong.fr

Schedule

	Opening hours	Answering service
[22] Monday		
[23] Tuesday		
[24] Wednesday		
[25] Thursday		
[26] Friday		
[27] Saturday		
[28] Sunday		

[29] What are the contact modalities with your action for the users (several possible answers)?

- | | | |
|---|---|--|
| <input type="radio"/> Immediate reception | <input type="radio"/> Derived by a public body of social service | <input type="radio"/> Admission procedure |
| <input type="radio"/> Telephonic contact | <input type="radio"/> Derived by a private body of social service | <input type="radio"/> Other (precisions):..... |
| <input type="radio"/> Appointment | <input type="radio"/> Forced step (report) | |

[30] What are the taking into care conditions by your organization (several possible answers)?

- | | | |
|--------------------------------------|--|---|
| <input type="radio"/> None | <input type="radio"/> Age conditions | <input type="radio"/> Test |
| <input type="radio"/> Social inquiry | <input type="radio"/> Social insurance | <input type="radio"/> Other (precision):..... |

[31] What is your intervention place (several possible answers)?

- User's home
- Organization
- In other organizations

[32] What is your intervention mode (*several possible answers*)?

- Individual
- Collective
- Community

[33] What is your status (*only one possible answer*)?

- Administration
- Association
- Insertion firm
- Public organization
- Private firm

If necessary, **[34]** organization by which your institution is managed:
[35] organization by which your institution is accredited:

INVOLVED PUBLIC**[36] What is the main public of your institution** *(only one possible answer)?*

- o users (first line)
- o professional or voluntary caregivers (second line)

→ [37] If your public is mainly composed by users, specify the specific publics.

- o All publics

or

If your institution action does not concern all the publics, we thank you to tick the concerned specific users in the table below.

- o Infancy (0-3 years)
- o Young children (4-6 year)
- o Children (7-12 years)
- o Teenagers (13-18 years)
- o Young adults (19-25 years)
- o Old people
- o Men
- o Women
- o Pregnant women
- o Women with non-wanted pregnancy
- o Families
- o One-parent families
- o Isolated people (without children)
- o Young people with school difficulties
- o Young people without any qualification
- o People who have a qualification or apprenticeship contract
- o Beneficiaries of a solidarity income
- o Job seekers
- o Social beneficiaries (social assistance,...)
- o Workmen – employed people
- o Independent workers
- o People who have a professional activity (of any category)
- o Handicapped workers
- o Prematurely retired people/ retired people
- o Tenants
- o Home-owners
- o People who seek for a housing
- o People who have a precarious lodging (unsanitary, without comfort, eviction ...)
- o People who in a emergency reception place
- o Homeless people
- o People with financial difficulties
- o People with many debts
- o Foreigners, migrants, immigrants
- o Refugees, undocumented residents
- o Displaced people

- o Asylum-seekers
- o Remand prisoners, former remand prisoners
- o Illiterate people (schooling in the common language)
- o Illiterate people (no schooling in the common language)
- o People in bad health and/or who need cares
- o Disabled people (if the working disability > 12 months)
- o People who suffered from a working accident
- o People who suffer from a professional disease
- o People who suffer from mental troubles, persons with mental handicap, autistics
- o People with physical handicap
- o People with sensory handicap (hearing-impaired persons, visually impaired persons...)
- o People who have a cancer
- o People who have AIDS
- o Life-ending people
- o People who have loosing their autonomy and/or who need cares at home
- o Homosexuals
- o Drug addicts
- o Alcoholics
- o Victims of sexual violance and/or abuse
- o People in relation with prostitution
- o Other (precision)
- o Other (precision)
- o Other (precision)

→ [38] If your public is mainly composed by caregivers, specify the specific publics.

- o Health professionnals
- o Actors of health promotion
- o Actors of social action
- o Inhabitants or users committees
- o Teachers
- o Trainers
- o Cultural actors
- o Actors of the economic and employment sector
- o Diffusion and communication organizations
- o Political stakeholders
- o Administrations and public operators
- o Non-governmental organizations
- o Other (precision).....

Please, indicate again your organization name:

ACTIVITY

[39] What is your activity sector?

Choose only one sector (the most specialized or the one that best corresponds to your official mission).
If the size or the functioning of your organization implies you lead activities in several sectors, fill-in a form for each activity sector.

- Health
- Employment and formation
- Housing
- Social action
- Education
- Leisure
- Culture
- Environment
- Communication
- Justice and law

[40] Activities(s) of the structure: (several possible answers)

- | | | |
|-----------------------------------|--|----------------------------------|
| <input type="radio"/> Information | <input type="radio"/> Management | <input type="radio"/> Employment |
| <input type="radio"/> Orientation | <input type="radio"/> Social accompaniment | <input type="radio"/> Formation |

[41] Briefly describe your activity activit .

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

Please indicate again your organization name :

SERVICES

[42] Which service(s) do you offer ?

The titles are suggested as a rough guide. You can tick services that are under another title than our main activity one. For example, if your main sector is health, you can tick the modality “putting at disposal of interpreters”.

- Information
- Orientation

Employment and Training:

- Accompaniment to create a firm
- Job coaching
- Qualification or apprenticeship contract
- Employment in an insertion structure
- Solidarity employment
- Practices coaching
- General training
- Professional training
- Professional check-up
- Dealing with the training expenses

Housing:

- Accompaniment to seek for housing
- Advise to the tenure of the housing
- Accompaniment to the housing appropriation
- Financial help to improve, renovate the housing
- Financial help to pay the rent or housing drafts
- Intervention of a housing fund
- Lodging
- Access to an insertion or a transitory lodging

Health context:

- Medical check-up
- General medical treatment
- Nurse cares
- Medical help at home
- Physical therapy or psychomotor cares
- Dental cares
- Dietary cares
- Specialized medical treatment
- Palliative treatment
- Individual therapy
- Couple therapy
- Family therapy
- Family planning
- Health prevention
- Sports
- Accompaniment of the treatment
- Opening of social rights
- Dealing with the medical expenses

Social and individual autonomy:

- Literacy
- Fight against illiteracy
- Accompaniment for the daily organisation
- Accompaniment of administrative steps

- o Budget educational accompaniment
- o Finalised financial help
- o Taking into account of the financial situation
- o Implementation of a trust or a legal guardianship
- o Debts negociacion
- o Request of solidarity income
- o Hygiene cares
- o Domestic help
- o Donation or landing of equipment
- o Tanslation, letter writer
- o Legal advice
- o Family mediation
- o Alimentary help
- o Collective or community activities
- o Cultural activities
- o Social balance
- o Personal social accompaniment
- o Familial social accompaniment
- o Measure of childhood protection
- o Educational support destined to the children
- o Psycho-medical assistance or prevention in academic institutions
- o Financial help for the custody
- o Practice of driving
- o Accompaniment for transports and mobility

Second-line resources

- o Coordination of local actions
- o Methodological assistance for actions (evaluation, ...)
- o Logistical assistance for actions (material, ...)
- o Assistance to seek funding for actions
- o Data gathering (epidemiological, socio-economic, repertory...)
- o Resources and documentation center

Communication

- o Information diffusion (written, audio-visual, Internet)
- o Assistance for communication (press conferene, website, graphics..)
- o Logistical assistance (room, material ...)
- o Events organization

Tables:

Table of countries

Table of municipalities: define by the project from a national or regional list.

Table of regions: define by the project from a national list.

Table of districts: define by the project