Exercise 1: Define metadata fields and more

Before You Begin

To access the CONTENTdm Administration module, you will need your CONTENTdm® training server information, including:

- URL for the Server on which you will configure your training collection

- User Name

- Password [i]

What you will learn

In this exercise you will learn how a new CONTENTdm Collection is configured. You will see the various functions provided by the tools and discuss when and how to use them to administer your collections. Your test collection has already been created for you. You will learn how to ensure that collections are publicly accessible and fields searchable, configure metadata field labels, and enable controlled vocabularies.

The Exercise

1) Open an Internet browser.

2) Type in the URL for the administrative functions:

   https://server17214.contentdm.oclc.org/cgi-bin/admin/start.exe

   and then press the **Enter** key**.**
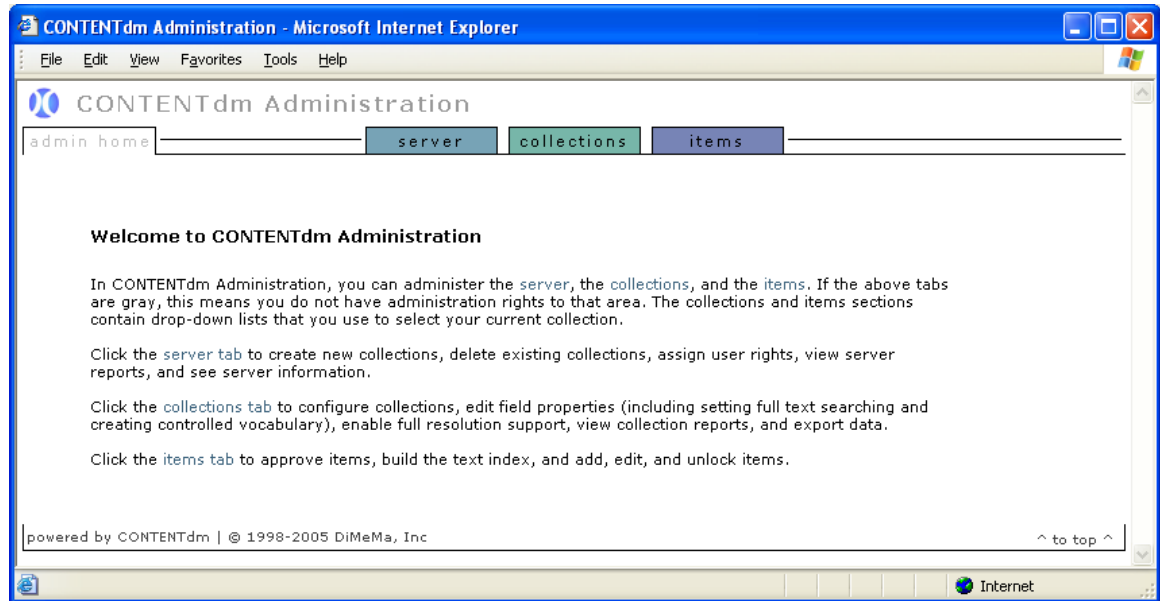
3) When asked for your **User Name** and **Password**, carefully enter them.

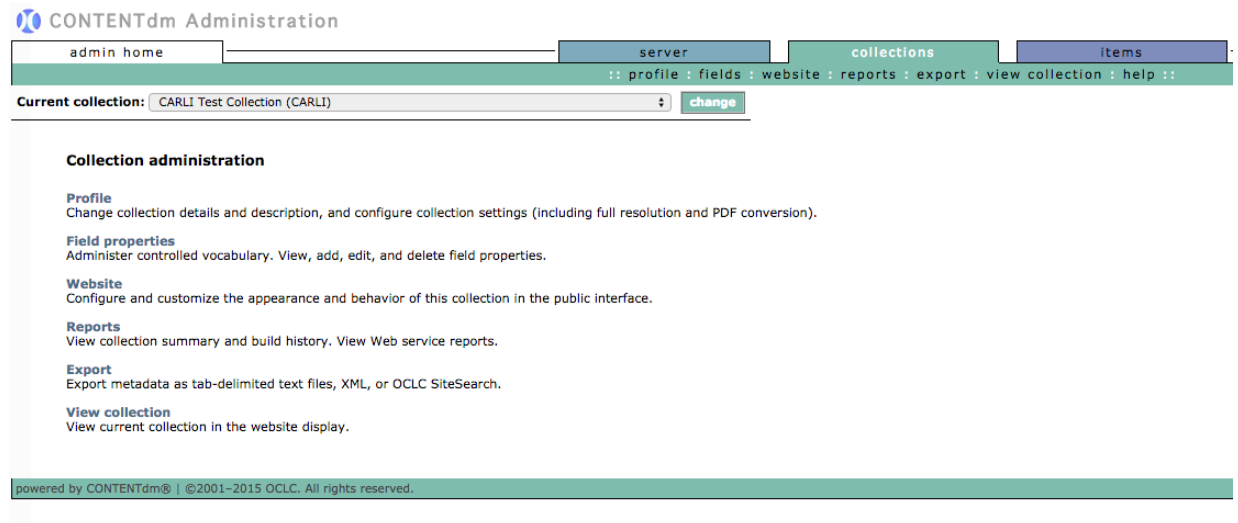**Figure 1: Authenticating your User Name with the CONTENTdm Server**

You will see the CONTENTdm Administration welcome page appear with options.

Figure 2: The CONTENTdm Administration functions by type of operation.

Access your new collection

1) For this exercise, go to the *Collections* tab, where you will see only those collections for which you have permission*.*

2) If more than one collection shows in the drop-down box, find yours in the drop-down list of collections and select it. (Click on **change** to move to your own collection if necessary.)

Figure 3: The Collections Administration menu listing your options.

Configure field properties

1) From the function bar, click on **fields**.

Metadata fields

View and configure collection and administrative fields.

Collection field properties

View, add, edit and delete fields. Enable full text searching and controlled vocabulary. After you have added, changed, or deleted fields, index the collection to update changes.

	Field name	DC map	Data type	Large	Search	Hide	Required	Vocab		
1	Title	Title	Text	No	Yes	No	Yes	No	move to ▾	edit | delete
2	Subject	Subject	Text	No	Yes	No	No	No	move to ▾	edit | delete
3	Description	Description	Text	Yes	Yes	No	No	No	move to ▾	edit | delete
4	Creator	Creator	Text	No	No	No	No	No	move to ▾	edit | delete
5	Publisher	Publisher	Text	No	No	No	No	No	move to ▾	edit | delete
6	Contributors	Contributors	Text	No	No	No	No	No	move to ▾	edit | delete
7	Date	Date	Text	No	No	No	No	No	move to ▾	edit | delete
8	Type	Type	Text	No	Yes	No	Yes	Yes	move to ▾	edit | delete
9	Format	Format	Text	No	No	No	No	No	move to ▾	edit | delete
10	Identifier	Identifier	Text	No	No	No	No	No	move to ▾	edit | delete
11	Source	Source	Text	No	No	No	No	No	move to ▾	edit | delete
12	Language	Language	Text	No	Yes	No	No	No	move to ▾	edit | delete
13	Relation	Relation	Text	No	No	No	No	No	move to ▾	edit | delete
14	Coverage	Coverage	Text	No	No	No	No	No	move to ▾	edit | delete
15	Rights	Rights	Text	No	No	No	Yes	No	move to ▾	edit | delete
16	Audience	Audience	Text	No	No	No	No	No	move to ▾	edit | delete
17	Collection	Relation-Is Part Of	Text	No	Yes	No	Yes	No	move to ▾	edit | delete
	Field name	DC map	Data type	Large	Search	Hide	Required	Vocab		add field

Figure 4: DC mapping by default on Hosted Training Server

Your new collection was created using metadata elements known as the **Dublin Core.** CARLI added an additional field that is required in all CARLI collections, called the "Collection" field. This field must include the **full name** of your collection and be present for every item within your collection.

You may add or subtract fields, duplicating the mapping or not, for up to 200 fields. You may choose from **Text**, **Date**[ii] or **Full text search** as data type. *Large* indicates only that during data entry, the text box drawn for the field will be large. (A small box will scroll as data is entered.)

You may decide to make each of your fields Searchable and/or Hidden. Finally, you can also determine if you want to make fields REQUIRED (i.e. that metadata must be entered into this field before the item can be added to your collection), and you can choose to enable a Controlled Vocabulary for any or all of your fields. (With cross-collection searches, the contents of only the searchable, mapped fields will be searched.)

CONTENTdm allows you to map a field to a qualified Dublin Core element as well. Note that in cross-collection searching, field-specific searching will devolve to the lowest common denominator-- the unqualified fields.

NOTE: CARLI requires five different fields for all items in CARLI Digital Collections. Four of these fields are already marked as **REQUIRED** in your field properties: Title, Type, Rights, and Collection. The fifth field is Language, and is only required when your collection contains text, audio, or video with speaking. In addition, the Type field is set up to use the controlled vocabulary of the Dublin Core Metadata Initiative (DCMI) Type vocabulary.

NOTE: Every collection must have a field that maps to **DC.Title** internally.

2) We will add new a field called **Transcript.** This field will be where we will later store the searchable text of an imaged page of printed or handwritten text.

3) Click **add field**.

4) Type the Field Name of **Transcript**

5) Map it to the Dublin Core option of **None** (top of options list), and make it **Searchable**. Since we intend to let the users read this text, leave the Hidden attribute turned off, and the field does not need to be required. Most importantly, change the data type to **Full Text Search**.

6) **Save** your changes.

Current collection: CARLI Test Collection (CARLI)

Add field

Index the collection after editing field.

Caution: Project Client users must close and re-open their current project in order to access changes to fields.

Field name	Transcript
DC map	None
Data type	Full Text Search
Show large field	No
Searchable	Yes
Hidden	No
Required	No
Controlled vocabulary	⦿ No ○ Yes

save changes

Figure 5: Add searchable field to hold full-text.

7) In order to use the **Identifier** field when we are searching for records to edit later, we will need to make it **Searchable**. Do this by **editing** the field and changing "**Searchable**" to *Yes*. Click on *Save Changes* and you will be returned again to the list of fields.

Current collection: CARLI Test Collection (CARLI)

Edit field

Index the collection after editing field.

Field name	Identifier
DC map	Identifier
Data type	Text
Show large field	No
Searchable	Yes
Hidden	No
Required	No
Controlled vocabulary	⦿ No ○ Yes

save changes

Figure 6: Make the Identifier field searchable field for later use.

8) Find the **Identifier** field again, and this time, click on the *move to* option and when the drop-down list opens, move the **Identifier** field to the last position in your field list (18). (This will make it easier to use tab-delimited files to import items from other systems in another exercise.)

Collection field properties

View, add, edit and delete fields. Enable full text searching and controlled vocabulary. After you have added, changed, or deleted fields, index the collection to update changes.

	Field name	DC map	Data type	Large	Search	Hide	Required	Vocab		add field
1	Title	Title	Text	No	Yes	No	Yes	No	move to ▾	edit | delete
2	Subject	Subject	Text	No	Yes	No	No	No	move to ▾	edit | delete
3	Description	Description	Text	Yes	Yes	No	No	No	move to ▾	edit | delete
4	Creator	Creator	Text	No	No	No	No	No	move to ▾	edit | delete
5	Publisher	Publisher	Text	No	No	No	No	No	move to ▾	edit | delete
6	Contributors	Contributors	Text	No	No	No	No	No	move to ▾	edit | delete
7	Date	Date	Text	No	Yes	Yes	No	No	move to ▾	edit | delete
8	Type	Type	Text	No	Yes	No	Yes	Yes	move to ▾	edit | delete
9	Format	Format	Text	No	No	No	No	No	move to ▾	edit | delete
10	Source	Source	Text	No	No	No	No	No	move to ▾	edit | delete
11	Language	Language	Text	No	Yes	No	No	No	move to ▾	edit | delete
12	Relation	Relation	Text	No	No	No	No	No	move to ▾	edit | delete
13	Coverage	Coverage	Text	No	No	No	No	No	move to ▾	edit | delete
14	Rights	Rights	Text	No	Yes	No	Yes	No	move to ▾	edit | delete
15	Audience	Audience	Text	No	No	No	No	No	move to ▾	edit | delete
16	Collection	Relation-Is Part Of	Text	No	Yes	No	Yes	No	move to ▾	edit | delete
17	Transcript	None	Full Text Search	Yes	Yes	No	No	No	move to ▾	edit | delete
18	Identifier	Identifier	Text	No	Yes	No	No	No	move to ▾	edit | delete
	Field name	DC map	Data type	Large	Search	Hide	Required	Vocab		add field

Figure 7: Move the Identifier field to the last position for easier mapping when importing from tab-delimited ASCII files.

Use a Controlled Vocabulary

1) From the **field properties** list, *Edit* the **Subject** field.

2) Enable the controlled vocabulary function for this field by clicking on **Yes**. Note that three methods for enabling a controlled vocabulary appear. Choose to use the Thesaurus for Graphic Materials: TGM 1 - Subject Terms

Edit field

Index the collection after editing field.

Field name	Subject
DC map	Subject
Data type	Text
Show large field	No
Searchable	Yes
Hidden	No
Required	No
Controlled vocabulary	○ No ⦿ Yes

Select and share controlled vocabulary

⦿ Create a new controlled vocabulary for this field

   ⦿ Use [Thesaurus for graphic materials: TGM I, Subject terms]   [view thesaurus]

   ○ Use the existing contents of the field

   ○ Import vocabulary from a file on the server.
   File must contain one term per line.
   Specify the complete path of the file on the server, such as D:\server\data\file.txt

○ Share this controlled vocabulary across other fields and collections.
(**Caution:** Sharing the controlled vocabulary means that it can be edited in other collections.)

   Name shared vocabulary [   ]

⦿ Do not share this controlled vocabulary

○ Use a controlled vocabulary from another field or collection

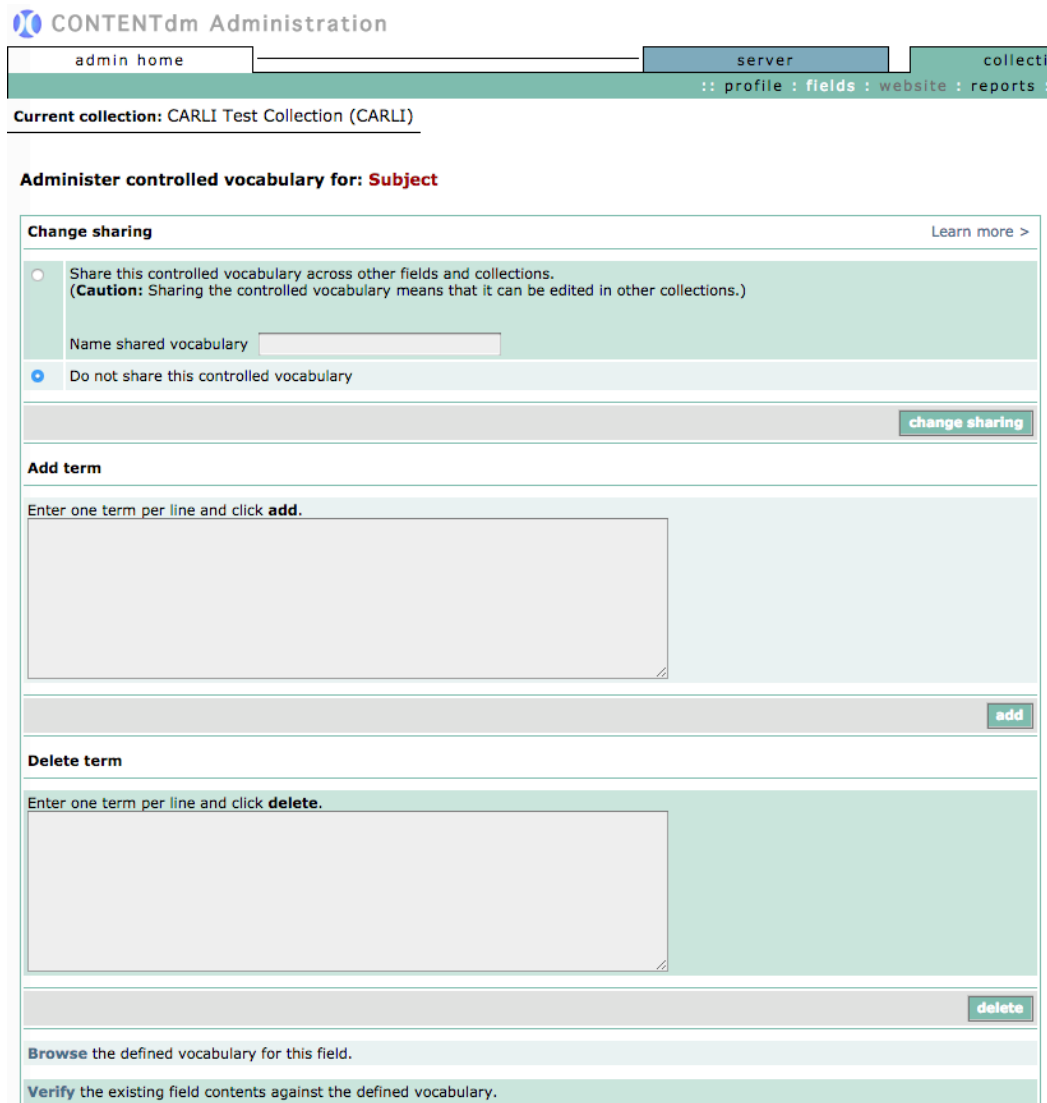[Choose the controlled vocabulary]

[save changes]

Figure 8: Enable controlled vocabulary on the Subject field.

3) You may view thesaurus if you like; **close** it by clicking the **X** in upper right corner.

4) Click on **save changes** to accept this controlled vocabulary for your **Subject** field.

5) Edit the **Subject** field again, this time noting that you may **administer the Controlled vocabulary** you have just set.

Note: Here you can add and delete terms from the headings list. At any time after you have populated your collection, you can return here to verify that the Subject terms existing in the collection are authorized.

If you find terms in your collection that are not in the list, you can either add the terms to the list at that time in this function, or use the **Find & Replace** function to globally search the **Subject** field for an old heading and then change it to a newly added one.

Figure 9: Maintaining the controlled vocabulary and verifying collection contents

Closing your browser will ensure that you are logged off from the CONTENTdm Administration modules.

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[i] Training usernames and passwords have been authorized to perform all administrative functions for individual collections for this class.

[ii] Recommended best practice for encoding the date value is defined in a profile of ISO 8601 [W3CDTF].