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

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.

Welcome to CONTENTdm Administration

In CONTENTdm Administration, you can administer the server, the collections, and the items. If the above tabs are gray, this means you do not have administration rights to that area. The collections and items sections contain drop-down lists that you use to select your current collection.

Click the server tab to create new collections, delete existing collections, assign user rights, view server reports, and see server information.

Click the collections tab to configure collections, edit field properties (including setting full text searching and creating controlled vocabulary), enable full resolution support, view collection reports, and export data.

Click the items tab to approve items, build the text index, and add, edit, and unlock items.

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.](image_url)

```plaintext
Collection administration

- **Profile**: Change collection details and description, and configure collection settings (including full resolution and PDF conversion).
- **Field properties**: Administrator controlled vocabulary. View, add, edit, and delete field properties.
- **Website**: Configure and customize the appearance and behavior of this collection in the public interface.
- **Reports**: View collection summary and build history. View Web service reports.
- **Export**: Export metadata as tab-delimited text files, XML, or OCLC SiteSearch.
- **View collection**: View current collection in the website display.
```
Configure field properties

1) From the function bar, click on fields.

Metadata fields
View and configure collection and administrative fields.

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

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 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.
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.

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.)

![Field Properties Table](image)

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

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