Exercise 3: Import a simple item and add metadata

What you will learn

In this exercise you will learn how to add files one at a time to a Project. You will explore some of the methods for adding metadata to items in your Project. You will suggest a new term for the Controlled Vocabulary you enabled in the Subject field for your Test Collection.

The Exercise

- 1) If not already open, open the Project Client either by clicking on the Shortcut on your desktop, or finding it in your **Start/Programs** menu on your computer desktop.
- 2) Open your project. If necessary, choose "Open Existing Project" from the Task Bar or from the "Project" menu at the top of the window. From the *Open an Existing Project* dialog box, select your COLLECTION and then the PROJECT you want to open.

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https://server17214.contentdm.oc	lc.org/
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CARLI Test Collection (CARLI) IWU Art Collection (Illinois Wesle	CARLI Project by Amy Photo upload project Photographs
Open	Cancel

Figure 1: Selecting a Project

3) Click Open. This opens your Project.

4) Import a single image. Either use the **"Add Item"** option under "Common Tasks" in the task bar or select **"Item"** from the "Add" option in the menu bar at the top of the window.

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Figure 2: Add item(s) to your Project

5) **Browse** to the location where the exercise images have been stored. The default location for this training should be on your desktop.

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Places	Files of type: Images(*.jpg,*.gif)	ancel

Figure 3: Browsing to Exercise data folder for image files

- 6) Browse to the Exercise data folder located on your computer's desktop and select the file called *lake.jpg* and click **OK**.
- 7) Let the Project Client create the display image (default setting). Then click "Add" to import the image into the project spreadsheet.

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Figure 4: Importing an image into the project spreadsheet

8) Close the Project Summary box.

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Figure 5: Item now in project spreadsheet

Add metadata to the item

To edit/add metadata for any item in the Project Client, double-click on the icon of the item to open the individual item's tab. From there, metadata can be entered/edited and saved.

The metadata you enter is the information that end-users will see when they retrieve items in you collections.

Note: Items must have titles (at minimum) before they can be saved to Projects.

- "Lake" is already listed in the title field, since that was the file name of the image imported. Capitalize *Lake* in the Title field, by clicking in the "field values" box for Title and editing the name.
- 2) Type San Juan Islands in the Subject field and add a short description in the Description field. Note that controlled vocabulary is TURNED ON for the subject field, so a list of terms will automatically pop up on the right side of the screen. You can double-click those terms to add them to the field or add a term not found in the list, which you will approve later.

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Figure 6: Entering metadata in the Media Editor

3) The **Type**, **Rights**, **and Collections** fields are already set to be REQUIRED, so information must be added to these fields before the item can be uploaded to the server.

For the **Type field**, choose the appropriate type option from the controlled vocabulary list. Double click to add it to the field.

For the **Rights field**, add a right statement of your own invention.

For the **Collection field**, enter the FULL NAME of your collection. Including the institution name in parentheses, as per CARLI requirements.

4) Click the "Close" button at the top, right corner of the editor and choose "Yes" to save your changes.

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Figure 7: All metadata entered; click Close to save.

Soon we will streamline this process by importing prepared items in batches.