Exercise 9: Editing item in your collections

Before You Begin

To access the Collection Administration tools either from Project Client or from the Host URL, you will need your CONTENTdm:

- User Name and
- Password

What you will learn

You will use the **Edit** function in CONTENTdm Web Administration to access individual and global metadata editing capabilities and enhance the metadata of some of your items.

You will use **Field Properties** and the **Find and Replace** functions to add a new metadata field and populate it for all items in a collection.

You will also use the Project Client **Find in Collection** tool retrieve items in your collection so you may edit them.

The Exercises

Web-accessible functions

1) In your Web Browser, use your complete Web Administration URL:

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

and your User Name and Password to access the CONTENTdm Administration menu.

2) Select the Items tab.

Note: If you have permission to administer more than one collection, by default the first one on the server will be selected. If needed, change to the collection you want using the dropdown box that appears at the top of the list of functions.

admin home			se	rver	collections		items
			:: approve : inde	x add edit :	find & replace lock	administration	n : view collection
nt collection: CARLI Te	st Collection (CARLI)		<u> </u>	change			
Item administration	on						
Approve							
Approve, edit or delete	items in the pending q	ueue.					
Index	and date and a second second	distant and defects a feature					
Index the collection aft	er adding, approving, e	diting and deleting item	IS.				
Add	ding queue liteur are	reviewed and approved	before becoming part of th	e collection			
	ang queue. Items	chemed and approved	before becoming pare or en	e concetion.			
Edit Edit and delete items in	a collection.)					
Finances							
Find and replace metac	ata within one field, all	fields, or change fields	for all items.				
Lock administration							
Unlock items in a collect	tion.						
View collection							
View current collection	in the website display.						

Figure 1: Administer items in your library's collection.

Editing existing items' metadata on the server

- 1) From the Administration > items menu or navigation bar, click on edit.
- 2) Search the collection for items where we want to enhance the metadata for all images of whales. Remember that file names are stored in the Identifier field. Since these will have the media type extension (e.g., jpg, gif, tif), use the wildcard asterisk (*) to find all of the pictures of whales. Search on the Identifier field for whale*

CONTENT dm Administration - Windows Internet Explorer					
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COO - Inter://doms.ilcso.uiuc.edu/cgi-bin/admin/edit.exe?CISOROOT=,	'carli_test	2	- +,	X Google	Q
🚖 🕸 🖉 CONTENTdm Administration					🙆 •
CONTENTEM Administration					1
admin home colle	ctions	items	-		
:: approve : index : add : edit : find & replace	: loc	administra	tion	view colle	ction : help ::
Current collection: CARLI Test Collection (CARLI)				👻 change	
Browse or search for items you wish to edit, delete, export or add to Search: Across all fields Selected Fields By proximity Find results all of the words whale*		Identifier	field	show terms	browse collection
	in the	1	-	show terms	
+ more fields - fewer fields Display 50 V results per page search clear all					
powered by CONTENTdm © 1998-2006 DIMeMa; Inc.					^ to top ↑
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Figure 2: Search on the Identifier field for the file name you stored.

- **Note**: Once your search returns results, there are both global and selected actions available to you in the Edit functions.
 - a. Global functions work on every result found from your search. You can delete simple and compound objects; with compound objects, you have the choice to delete all components in addition to the compound object itself.
 - b. Selective actions operate on sets or individual items. You can select individual items and delete them, export them, or assemble them into a compound object. Alternatively, you can operate on a subset of the retrievals, choosing to edit metadata or to delete the subset.

/ http://209.180.211.66:9101/c	dm4/admin/items/edit_res	ults.php?CISOMAX=50&CISOOP1=all&	CISOBOX1=wha 🔳 🗖 🔀
← ← Output Back Next Stop admin home	server colle	ctions items	
Global actions			
Caution: These actions affect	all results. Deletion cann	ot be undone.	
	delete all export all	add all to compound object	-
· · · · · · · · · · · · · · · · · · ·			
Delete mode			-
This setting determines how comp	ound objects are deleted.		
• Delete compound object only	C Delete compound obje	ct and its subpages	
Selected operations			
select all : clear all : delete : exp	port : add to compound obje	ct page 1 of 1 : (<< 1 >	>) :: previous : next
Image:	▲ Title: Subject:	Description:	
	whale1		metadata delete
Z	whale2		metadata delete

Figure 3: Search returns two items to edit.

3) Give the first item a better title and a fuller description, by clicking on **metadata** link on the right and filling in the fields more fully.

CONTENTdm Administr	ation		
← → 😣 🞼 ack Next Stop Refre			
CONTENT	m Administration		
dmin home	server collections	items	
	: add : edit : find & replace : lock a		llection : help
urrent collection: Colle	ection 3		
Edit item Edit metadata then click s you must rebuild the text	ave changes. To remove this item from the coll index.	ection, click delete . After mal	king changes,
		view this item	
Title	Flukes in the air		
Title Subject	Flukes in the air	controlled vocabulary	
	Flukes in the air Photograph of a pilot whale whale diving with dorsal flukes in the air. The location is Orcas island in the San Juans.	controlled vocabulary	
Subject	Photograph of a pilot whale whale diving with dorsal flukes in the air. The location is Orcas		
Subject Description	Photograph of a pilot whale whale diving with dorsal flukes in the air. The location is Orcas		
Subject Description Creator	Photograph of a pilot whale whale diving with dorsal flukes in the air. The location is Orcas island in the San Juans.		
Subject Description Creator Publisher	Photograph of a pilot whale whale diving with dorsal flukes in the air. The location is Orcas island in the San Juans.		
Subject Description Creator Publisher Contributors	Photograph of a pilot whale whale diving with dorsal flukes in the air. The location is Orcas island in the San Juans.		
Subject Description Creator Publisher Contributors Date	Photograph of a pilot whale whale diving with dorsal flukes in the air. The location is Orcas island in the San Juans.		

Figure 4: Editing metadata for an existing record via Web Administration.

4) Save changes, and build the index to have them take effect.

Adding and Populating a New Metadata Field for All Existing Items in a Collection

If you need to add a metadata field to a current collection and then populate that field with the same information for every item within the collection (such as the CARLI-required "Collection" or "Rights" fields, or the recommended "Contact Information" field for DPLA-harvested collections), follow these steps to first add the new field and then populate it.

Add a New Metadata Field to Your Current Collection

1) Go to the **Collections** tab and choose **Field properties**.

admin home		server	collections	items
	configur	ation fields vie	ewers reports ex	port view collec
Current collection: CA	ARLI Test Collection (CARLI)		chan	nge
Collection ad	ministration			
Configuration				
Change collectio	n details and description, and configu	ure collection settings (including full resolution a	and PDF conversion).
Field propertie	s			
Administer contr	rolled vocabulary. View, add, edit, an	d delete field propertie	s.	
Viewers				
	em and object viewers for this collect	ion.		
Configure the ite	em and object viewers for this collect	ion.		
Configure the ite	ern and object viewers for this collect summary and build history.	ion.		
Configure the ite Reports View collection s		ion.		
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Configure the ite Reports View collection s Export Export metadata View collection	ummary and build history. a as tab-delimited text files, XML, or (OCLC SiteSearch.		
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Configure the ite Reports View collection s Export Export metadata View collection	ummary and build history. a as tab-delimited text files, XML, or o	OCLC SiteSearch.		

Figure 1: Field properties on the Web Administration Collections tab

2) Add a new metadata field called "Contact Information". For this field, the Dublin Core (DC) mapping should be "None" and the field should have Searchable set to "No," Hidden set to "No," and Required set to "Yes."

Add field	
Index the collection after editing field.	
Caution: Project Client users must close and re-o	pen their current project in order to access changes to fields.
Field name	Contact Information
DC map	None
Data type	Text
Show large field	No
Searchable	No 🔽
Hidden	No
Required	Yes T
Controlled vocabulary	O No ○ Yes
	save changes

Figure 2: Add a new Contact Information field to the existing collection.

- 3) Click the "save changes" button to save the new field.
- 4) Once your new field(s) is added, you may use the "move to" dropdown list to change its position in the list of fields within the collection's Field Properties.
- 5) After you have created your new field you can add text to it using a global find and replace. This will add the same text to the field for every item in the collection.

Making Global Find and Replace Edits

1) In the Items tab of CONTENTdm Web Administration, choose Find & replace.



Figure 1: Find and replace option on the Web Administration Items tab.

2) In the Change Field Metadata option, select the field from the dropdown list into which you want to input information, and then enter the appropriate text you want to populate the field. Contact information should include an email address and/or phone number for your institution.

Change field metadata	
Change contents in the	Contact Information 🗾 field
to	contact CARLI at support@carli.illinois.edu
	for every item in the collection
	change

Figure 2: Selecting the correct field in the Change field metadata option

3) Click the change button. This will add information into that field for every item in this collection. Note: This action will replace any existing data in the field if you are making this kind of change on a field that was already in your collection and populated with data. 4) Once the change is completed you will receive a confirmation page stating how many records were affected.

CONTENTdm Adm	inistration
admin home	server
	:: approve : index : add : edit
Current collection: CARLI Test C	ollection (CARLI)
Find and replace complete Rebuild the text index to a	ed. Number of replacements: 21 activate changes.

Figure 3: Number of replacements shown after change is completed.

5) Index the collection in order for the changes to appear.

Editing from the Project Client

1) Open your Photographs Project in the Project Client.

2) Imagine that you want to update certain items in your collection with a better image or add additional metadata, without losing the metadata you've already created.

Finding Items to Edit Using the "Find in Collection" Tab

1) Click on the Find in Collection tab in your Project Client.

1	CONTENT dm Project Client		
	Project Add Item Edit	oministration Help	
	🔂 Home	Sind in Collection Photographs	
		Search My Advanced Search Browse Collection - Preferences	
		Search or browse collection to retrieve items	
	CARLI Test Collection	Select All Clear All Add to Project (edit) View Item on Web 🛪	
	(CARLI)		
	<u> Photog</u> raphs		

Figure 1: Finding items in your collection for editing

There are several options in the Find in Collection tab:

You may BROWSE the collection to retrieve multiple results without doing an exact search

You may SEARCH across all fields for a specific term.

You may use ADVANCED SEARCHING to narrow your search, by searching specific fields.

	🗷 CONTENTdm Project Client	
	Project Add Item Edit Administr	ration Help
		C Find in Collection Photographs
1	~	Search My Advanced Search 👻 Browse Collection 💌 Preferences
-		Search or browse collection to retrieve items
	CARLI Test Collection	Select All Clear All Aud to Project (edit) View Item on Web 7
	(CARLI)	
	A Photographs	

Figure 2: Search options when using Find in Collection

2) Search across all fields for items with metadata containing the partial word " sea* " which will return all items with "sea" as part of their metadata).

🔂 Home	Find in Collection						
ea* 🗸 🗸	Search My Adva	anced Search 👻 Browse C	ollection 👻 Prefer	ences			
	Search results for	'sea*'					
CARLI Test Collection	Select All Clear	All Add to Project (edit)	View Item on Web	7			
(CARLI)	Th	iumbnail	Title	Subject	Description	Creator	Publisher
Text Common Tasks Wy Advanced Search Browse All Browse by Controlled Vocabulary			sealion				Amy Maroso
Item Tasks Add to Project (edit) View Item on Web			sealion1				Amy Maroso

Figure 3: The Project Client returns a list of items with "sea*" in their metadata.

3) To Edit any of these items, choose individual items using the check box next to the item's icon or use the "Select all" option in the submenu. For this exercise, select **ALL** of the images.

4) Once you select all the images, they are now ready to be imported back into your Project for editing. Click on "Add to Project (edit)" to move these items to you project spreadsheet.

🔂 Home	🔦 Find in C	ollection	<u>&</u> Text				
ea* 🗸 🗸	Search res	My Advanced Search + D autor for 'sea*' Gear All Add to Project					
(CARLI)		Thumbreil	ntle	Subject	Description	Creator	Publisher
Ext Common Tasks Solution Wy Advanced Search Browse All Prowse by Controlled Vocabulary	•		sealion				Amy Maroso
			sealion 1				Amy Maroso

Figure 4: Add to Project (edit) option in the submenu

5) A lock icon appears next to each item. This means the item is LOCKED and cannot be worked on by anyone else until is it deleted from your project, or uploaded and approved and the collection is indexed. This prevents two people from making edits to an item at the same time.



Figure 5: Items are locked when added to your project.

6) Click on your project tab to view the project spreadsheet. The items you just imported are now back in the spreadsheet and ready to be edited just as you would any item that had been imported into the project for the first time. Edits items as you wish, then re-upload, approve and index the collection. Note: Updated metadata will only appear after the edited items are approved and indexed. Until then, the old metadata will be visible.