

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.

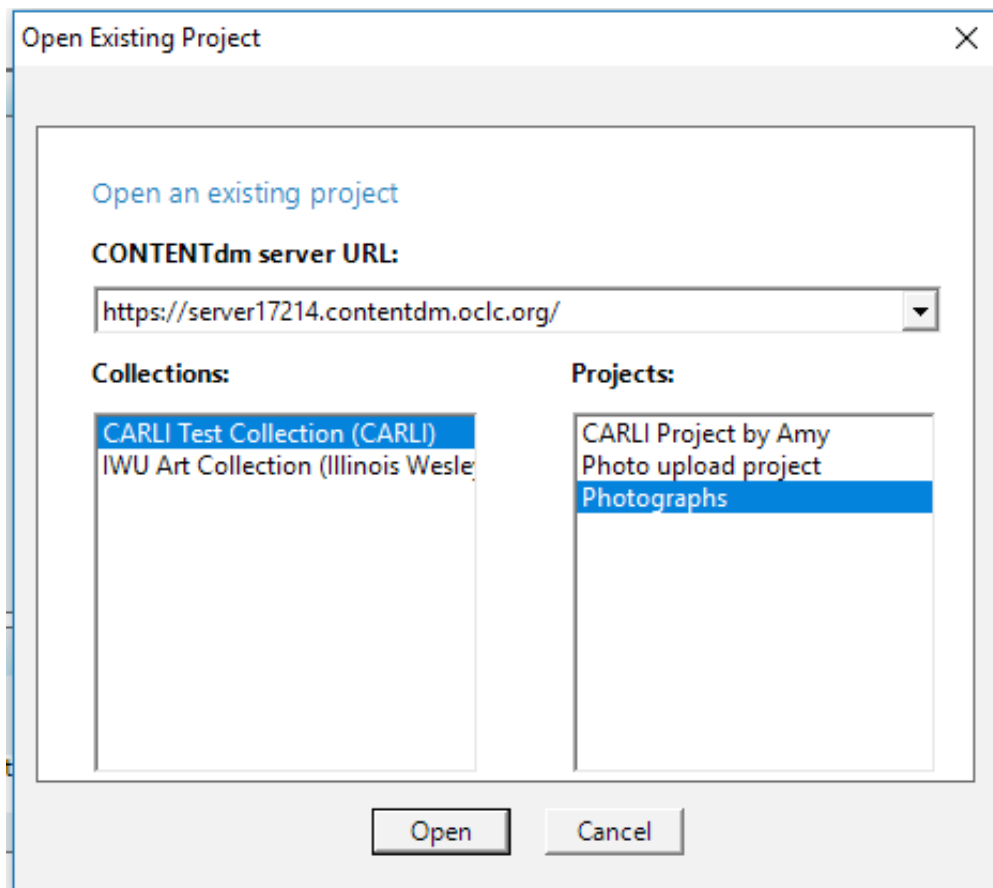


Figure 1: Selecting a Project

- 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.

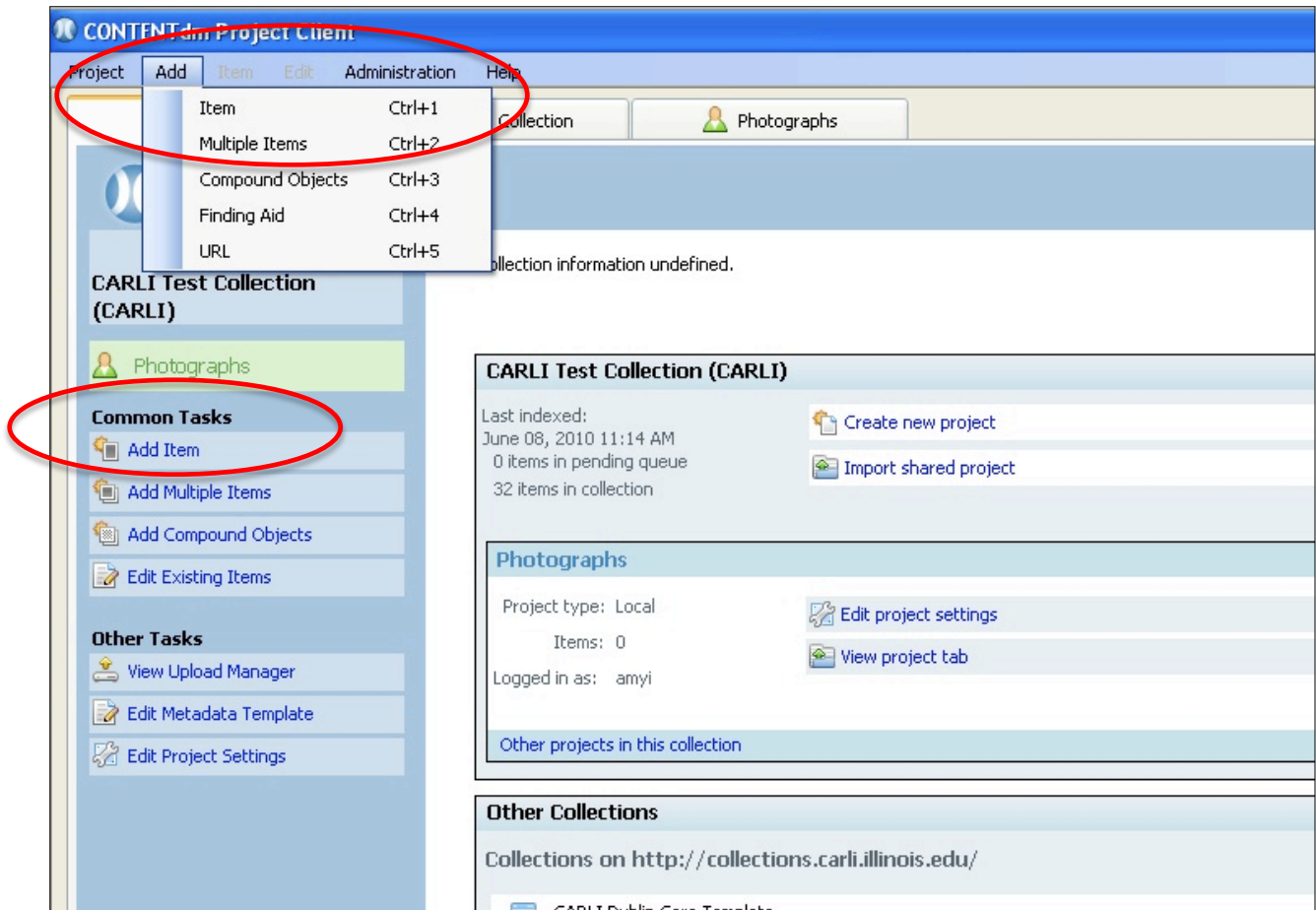


Figure 2: Add item(s) to your Project

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

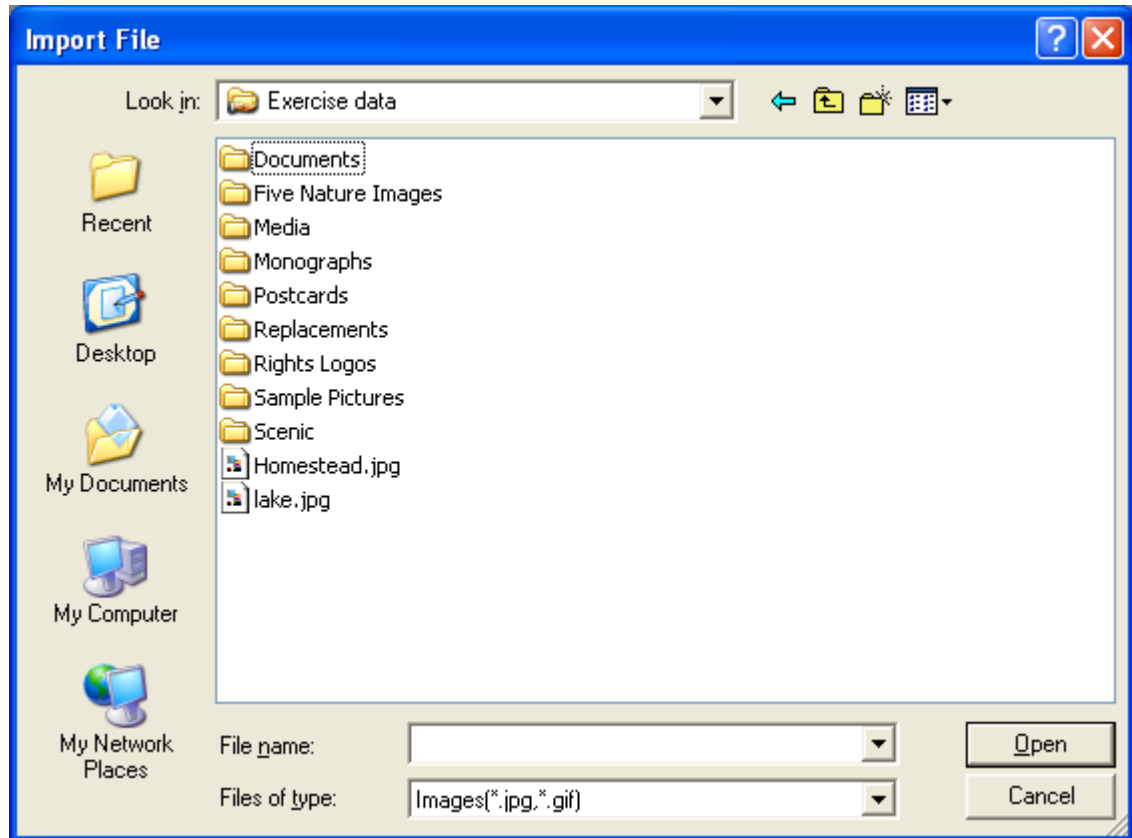


Figure 3: Browsing to Exercise data folder for image files

- 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.

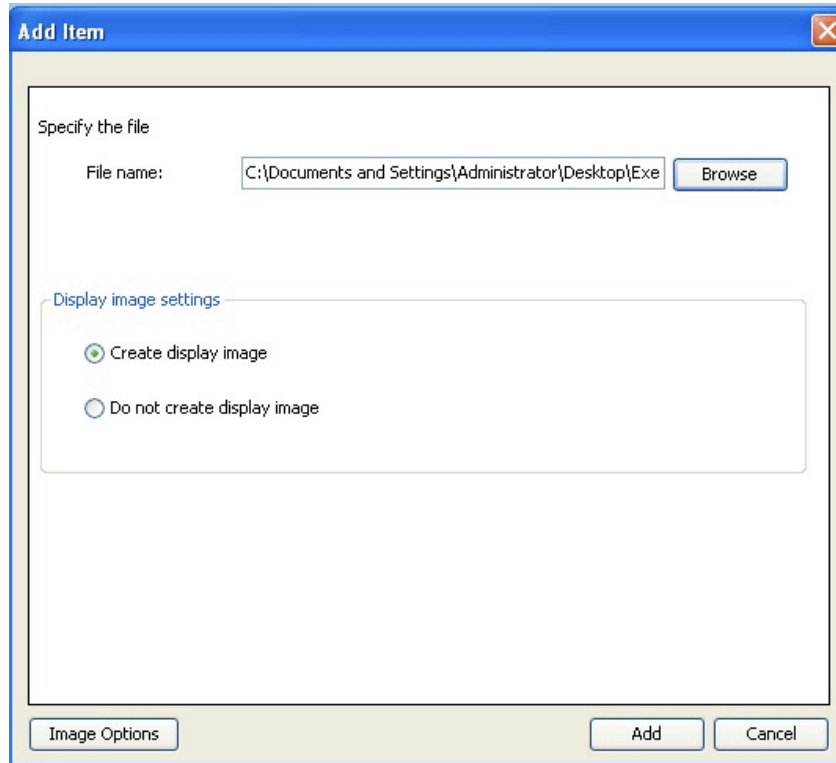


Figure 4: Importing an image into the project spreadsheet

8) Close the Project Summary box.

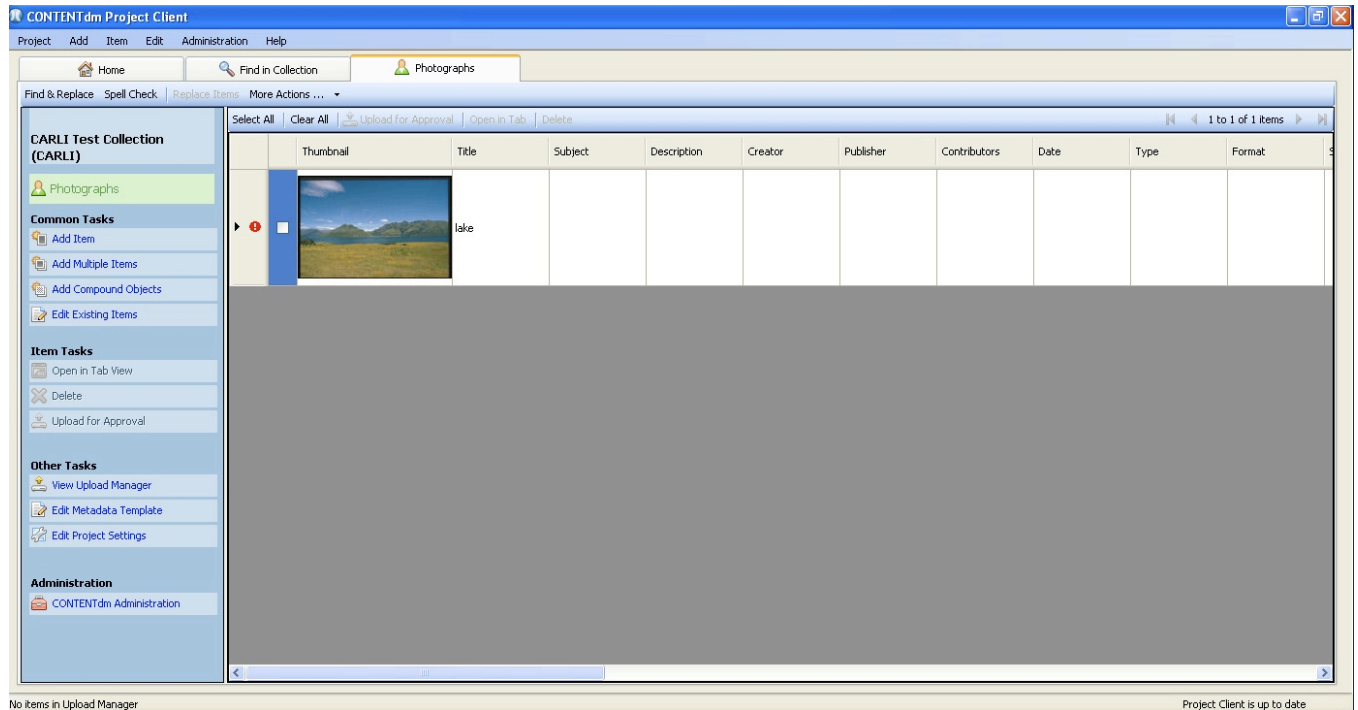


Figure 5: Item now in project spreadsheet

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.

- 1) "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.

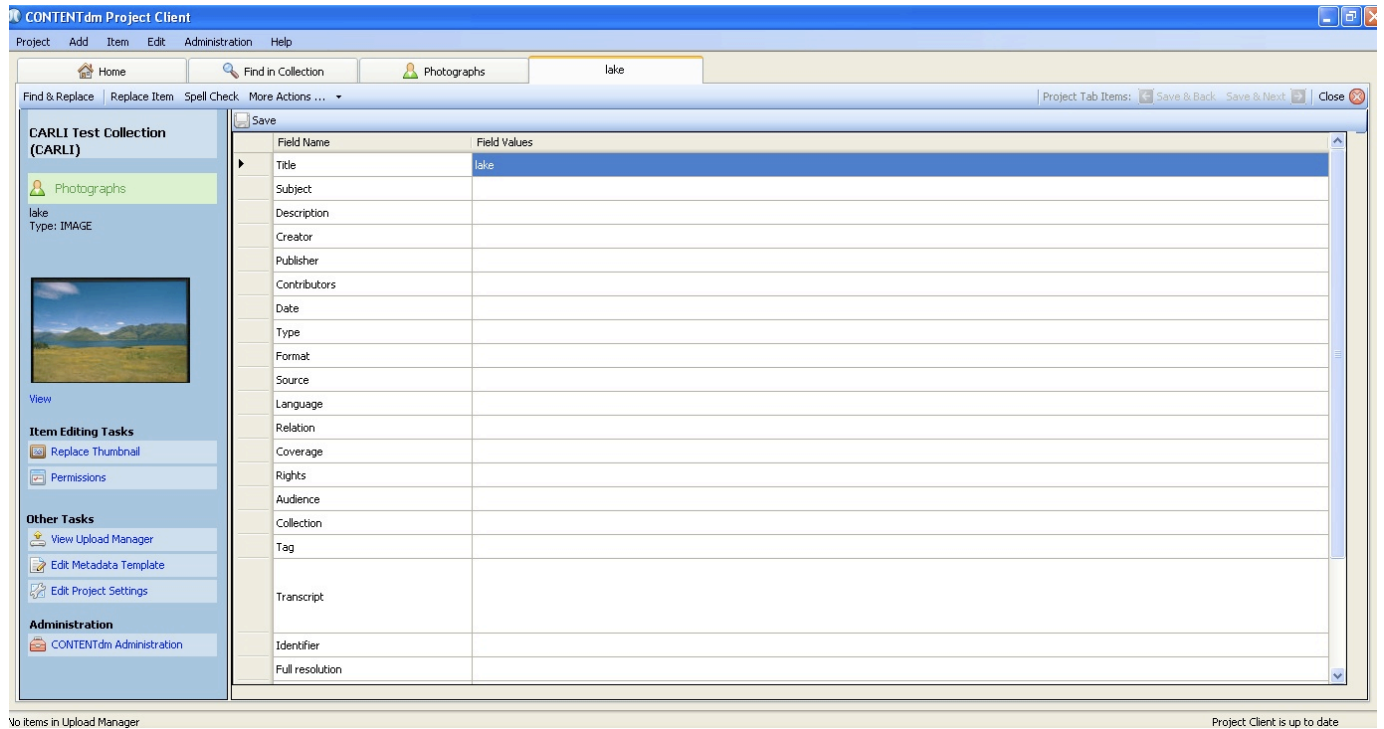


Figure 6: Entering metadata in the Media Editor

- 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.

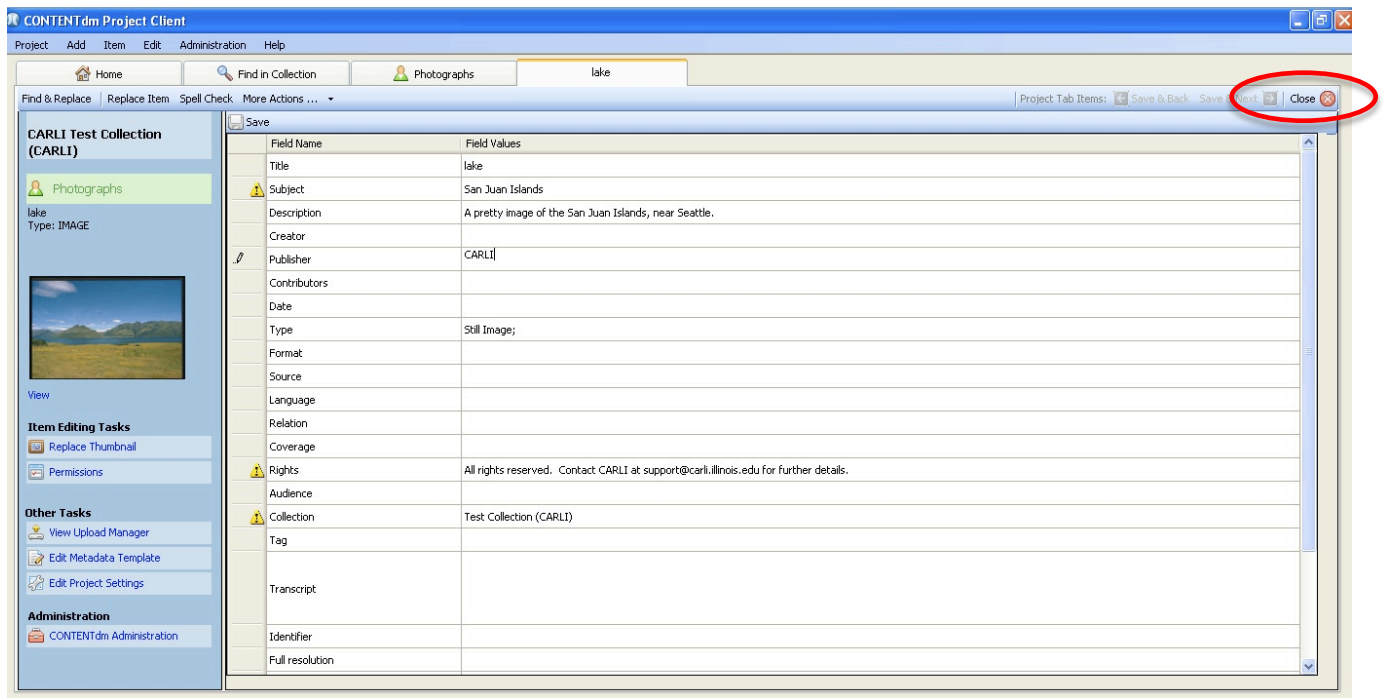


Figure 7: All metadata entered; click Close to save.

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