Intrallect intraLibrary 2.8: Getting Started- Uploading and Cataloguing Resources

Revision: 4
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Last Revised: 2nd February 2007
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Product: intraLibrary, Learning Object Repository

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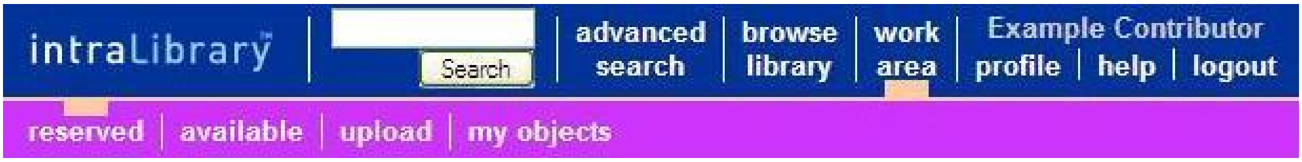
1. Contributing Resources to the Library: Introduction

Users who have *contributor* rights to use intraLibrary, i.e. Contributor, Librarian and Administrator users, may add resources to the library. If you have contributor rights then you will see a *Work Area* listed on the main navigation bar, as in the following illustration:



If you think you should have contributor rights to the library and you *don't* see this view, contact your local administrator.

IntraLibrary allows administrators to set up *workflows* involving any number of different processes and people. This means that contributing learning resources to the library can be very basic, with one person doing the uploading, cataloguing and publishing of a resource, or more complex, with a number of different people performing different actions at different stages. The kinds of actions that can be carried out in a workflow when contributing a resource include:

- uploading
- cataloguing
- adding copyright and conditions of use information
- quality checking the resource
- sending the resource to a subject specialist for extra cataloguing
- deleting.

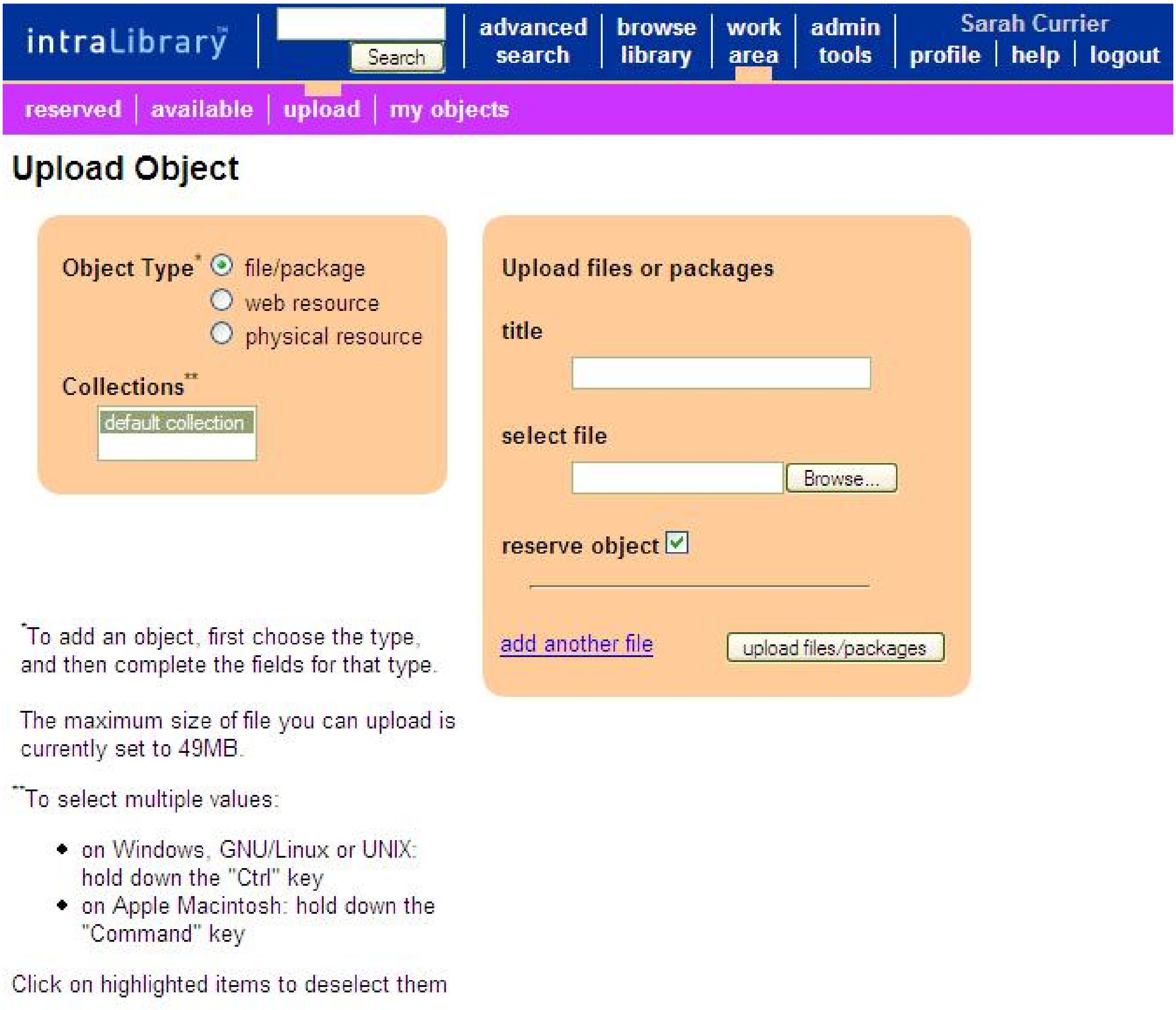
In addition, there may be a number of collections within your library that you can contribute to, and you may belong to one or more groups that have access to different workflows and collections. All of this will be set up by your administrator, and they should provide you with specific instructions. Clearly, the number of possible permutations is vast. This guide therefore takes a very simple workflow as an example to illustrate the main things you will need to understand and do when adding a resource to the library:

- **Uploading resources:** see below under section 2 Adding a Learning Resource to the Library
- **Cataloguing and classifying resources (creating metadata):** see below under section 3 Cataloguing a Learning Resource

- **Adding copyright and conditions of use information about a resource:** see below under section 4 Licensing, Copyright, and Conditions of Use Information for Resources
- **Making resources available to others in the library:** see below under section 5 Publishing: Making a Learning Resource Available to Others in the Library

2. Adding a Learning Resource to the Library

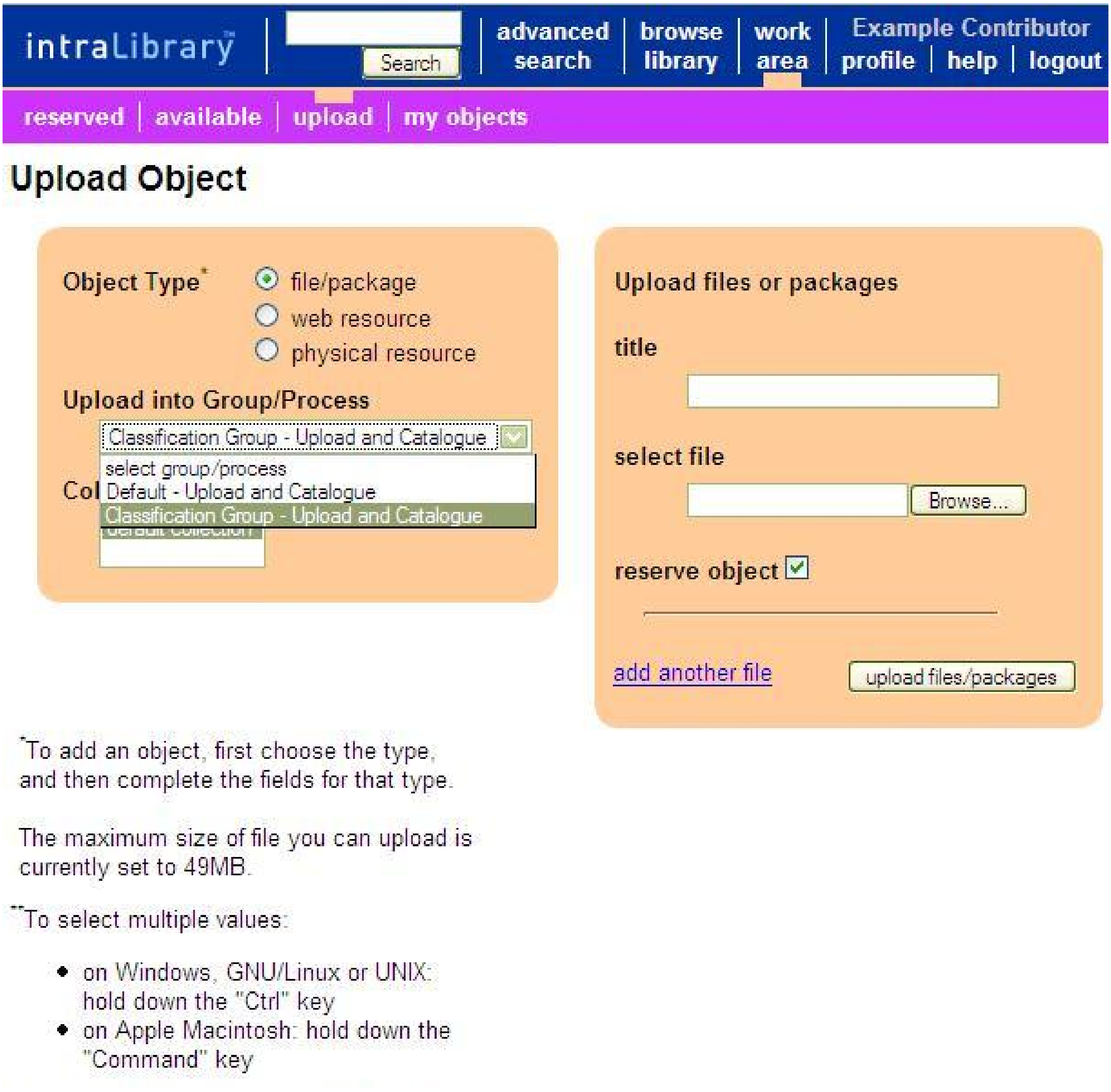
As noted above in section 1 Contributing Learning Resources to the Library: Introduction, Contributor users have a *Work Area* which can always be accessed from the top navigation bar. To add resources, click on *Work Area*, then on *upload*. The following illustration shows what the upload screen looks like in the simplest scenario, when the library only has one collection and the user only belongs to one group:



You will see in the *upload* screen that you can add three kinds of resource to the library:

- **files/packages:** single files, and more complex packages including IMS and SCORM content packages.
- **web resources:** links to external web resources.
- **physical resources:** references to external physical resources such as books or articles.

For each of these resource types, you must click to select the type, then select which collection or collections you are adding the resource to. If you belong to more than one group, you will first need to select which group process you wish the resource to be made available to: see your local administrator's instructions for more information. If you only belong to one group, you will not be presented with this option. The following illustration shows a user who belongs to more than one group selecting a group process to upload their resource to:



You must also decide whether you wish to *reserve* each resource when you add it, by selecting or unselecting the *reserve object* checkbox. If you *reserve* a resource it will go into your private reserved work area so that you can work on it immediately. Click on *reserved* in your work area's purple navigation bar to see all of the resources you have reserved.

If you do not reserve a resource when uploading, it will go into the *available* area, so that anyone who has access to the correct collection and workflow stage can access it to work on. Click on *available* in your work area's purple navigation bar to see all of the resources that have been made available for you to work on, by yourself and others. You can reserve resources in this area by clicking on the *reserve object* button: 

For files and packages you can add up to 10 resources at once, by clicking the *add another file* link.

The rest of this section gives specific instructions for adding different resource types to the library.

2.1. Uploading Single Files

Single files, for example Word documents, PowerPoint presentations, PDFs, images, etc. can be added to intraLibrary. To upload a single file use the following steps:

1. Select the *Work Area* from the top navigation bar.
2. Select the *upload* option to upload a file.
3. Select *file / package* under *Object Type*.
4. If you belong to more than one group, you will have to select which group process you wish the resource to be uploaded to. See your local administrator's instructions for more information on this. If you only belong to one group you won't be presented with this option.
5. Select which collection or collections you are adding the resource to.
6. Click on the *Browse* button under *select file* and find the resource you want to add on your own local computer or file system.
7. Optionally, enter a title for the resource. If you don't enter a title at this stage, the file name will be used. You can change this later, when cataloguing the resource. See below under section 3 Cataloguing a Learning Resource for more details.
8. By default, the *reserve* checkbox is ticked; leave this if you wish the resource to go straight into your *reserved* area for you to work on. Unselect the checkbox if you wish to add the resource to the *available* area for anyone who has access to the relevant collection and workflow stage to work on.

9. Click on the *upload file/package* button to upload the file.

There may be a delay while your file is uploaded. This can be very short, but uploading a very large file over a slow network connection may take much longer. When your file has finished uploading you should see the message: ***objects were successfully imported*** near the top left of the screen. There will also be a *Package Import Details* link there: clicking this will open a window with technical information. Usually you would only view this window if the resource is *not* successfully imported.

You can upload up to 10 resources by clicking the *add another file* link.

You can also click on *reserved* to see a list of the resources you are working on, or on *my objects* to see a full list of all the resources you have ever contributed to the library, regardless of where they are in a workflow, and including those that have been published so others can see them.

The next step is to add information describing or cataloguing the resource. This information about a resource is known as *metadata*; see below under section 3 Cataloguing a Learning Resource for more details.

2.2. Uploading Complex Resources: Content Packages

A learning resource that contains more than one file must be uploaded as a standard content package that is compliant with the IMS Content Packaging specification or with SCORM. A content package is a .zip file that contains all the files used within the resource, and a manifest file that functions like a table of contents for the whole resource, determining its structure, or the order in which learners will see the resources within the package. There is a list of tools that allow you to create or edit IMS or SCORM packages in the intraLibrary FAQ at http://www.intrallect.com/support/intralibrary/faq/index.htm.

Uploading a packaged object is exactly the same as uploading a file; follow the process noted above in section 2.1 Uploading Single Files. You will be selecting a file that has a .zip file extension from your file system. IntraLibrary will automatically check whether this is a normal .zip file or a content package. Content packages are validated as standard IMS or SCORM packages by intraLibrary before they are imported into the system. If there are any problems a report will be generated to tell you what has happened; you can access this by clicking on the *Package Import Details* link in the top left-hand corner. If your content package is invalid it will need to be fixed before it can be uploaded.

You can upload up to 10 resources by clicking the *add another file* link.

You can also click on *reserved* to see a list of the resources you are working on, or on *my objects* to see a full list of all the resources you have ever contributed to the library, regardless of where they are in a workflow, and including those that have been published so others can see them.

The next step is to add information describing or cataloguing the resource. This information about a resource is known as *metadata*; see below under section 3 Cataloguing a Learning Resource for more details.

2.3. Adding Links to External Web Resources

IntraLibrary allows links to resources held elsewhere on the Web to be added to the library, and catalogued and classified like any other resource. This means that users can find relevant resources through a single intraLibrary search whether or not they are stored in the library. To add a Web link to the library use the following steps:

1. Select the *Work Area* from the top navigation bar.
2. Select the *upload* option.
3. Select *web resource* under *Object Type*.
4. If you belong to more than one group, you will have to select which group process you wish the resource to be uploaded to. See your local administrator's instructions for more information on this. If you only belong to one group you won't be presented with this option.
5. Select which collection or collections you are adding the resource to.
6. Enter the resource's URL in the *web address* box.
7. Optionally, enter a title for the resource. If you don't enter a title at this stage, you can do so later, when cataloguing the resource (see below under section 3 Cataloguing a Learning Resource).
8. By default, the *reserve* checkbox is ticked; leave this if you wish the resource to go straight into your *reserved* area for you to work on. Unselect the checkbox if you wish to add the resource to the *available* area for anyone who has access to the relevant collection and workflow stage to work on.
9. Click *create entry* to add the URL to the library. The resource itself remains at its remote location on the Web but you now have an intraLibrary entry for it.

You can click on *reserved* to see a list of the resources you are working on, or on *my* *objects* to see a full list of all the resources you have ever contributed to the library, regardless of where they are in a workflow, and including those that have been published so others can see them.

The next step is to add information describing or cataloguing the resource. This information about a resource is known as *metadata*; see below under section 3 Cataloguing a Learning Resource for more details.

2.4. Adding References to Physical Resources

IntraLibrary allows references to physical resources, such as books, journal articles, videos, etc., to be added to the library, and catalogued and classified like any other resource. This means that users can find relevant resources through a single intraLibrary search whether or not they are stored in the library, or indeed available in digital format at all. To add a reference to a physical resource to the library use the following steps:

1. Select the *Work Area* from the top navigation bar.
2. Select the *upload* option.
3. Select *physical resource* under *Object Type*.
4. If you belong to more than one group, you will have to select which group process you wish the resource to be uploaded to. See your local administrator's instructions for more information on this. If you only belong to one group you won't be presented with this option.
5. Select which collection or collections you are adding the resource to.
6. Enter a location for the resource in the *physical location* box, following your local administrator's guidelines. This location could be a shelf call number for a book in a library, a URL linking to a catalogue entry in a library catalogue, or a journal reference for an article or paper, etc.
7. You must enter a title for the resource. You can change this later if necessary, when cataloguing the resource (see below under section 3 Cataloguing a Learning Resource).
8. By default, the *reserve* checkbox is ticked; leave this if you wish the resource to go straight into your *reserved* area for you to work on. Unselect the checkbox if you wish to add the resource to the *available* area for anyone who has access to the relevant collection and workflow stage to work on.
9. Click *create entry* to add the resource reference to the library.

You can click on *reserved* to see a list of the resources you are working on, or on *my objects* to see a full list of all the resources you have ever contributed to the library, regardless of where they are in a workflow, and including those that have been published so others can see them.

The next step is to add information describing or cataloguing the resource. This information about a resource is known as *metadata*; see below under section 3 Cataloguing a Learning Resource for more details.

3. Cataloguing a Learning Resource

This section describes how to create a basic description for a learning resource, a process known as cataloguing, or creating metadata. The purpose of the information you add here is to allow people to find the resource in the library, and to provide them with details about the resource that might help them to select or use it. It is also important that this information is correct as it helps to identify who is responsible for creating the resource, thus ensuring that authors and other contributors are acknowledged. It can assist with use of the resource by providing technical information, such as what format the resource is in, and educational information, such as how you use it yourself with students.

The managers of your intraLibrary installation will have made decisions about what metadata should be created for resources, and how. Your administrator will have set the system up accordingly. This means that there are a number of possible permutations for metadata and workflows, so this guide aims only to give you a basic overview for general use of the Metadata Editor. Please consult your local administrator's guidelines for more information.

Your Work Area

In order to get started with adding or editing metadata for resources, go to your *Work Area* and click on *reserved*. This is where resources that you have permission to work on, and that you have set aside for yourself, are listed. There may also be resources available for you to work on in the *available* area. You can reserve resources in this area by clicking on the *reserve object* button: . You can also send resources back into the *available* area from your *reserved* area by clicking on the *unreserve object* button: .

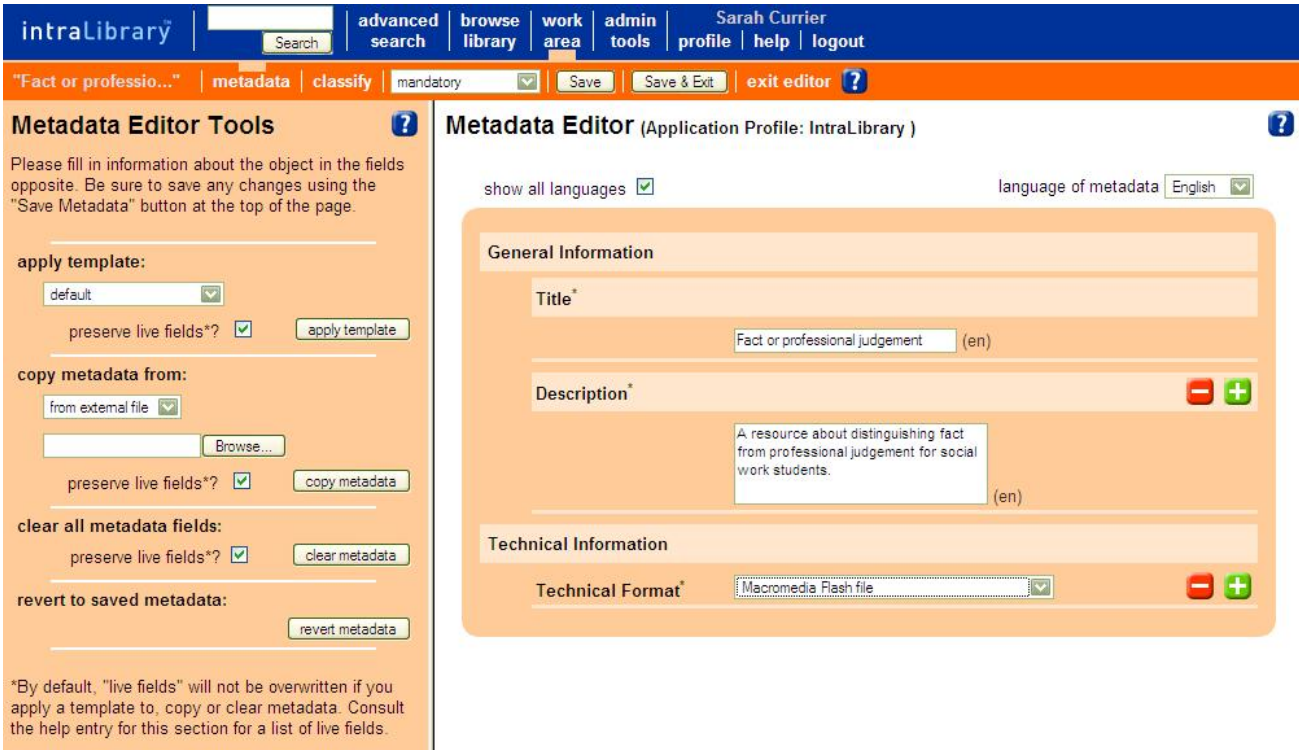
You can have any number of resources in your Work Area; if you have a large number, you may find it useful to be able to search them. You can search your *reserved* and *available* areas using the search box near the top of the screen called *Filter Objects*. You can search by group workflow stage, or by using a search you have previously set up in the *Advanced Search* screen. For more information on this, see section **4.4 Saving Your Favourite Searches: Search Filters** in the intraLibrary manual ***Getting Started- Finding and Using Resources***.

If you have permission to create and edit metadata for a resource in your *reserved* area, you will see this *Edit Metadata* button below it: . You can also view a resource's existing metadata by clicking on the *View Object Information (Metadata)* button: .

3.1. Creating and Editing Metadata: Cataloguing Resources in the Library

In your *reserved* area, click on the *Edit Metadata* button for the resource you want to describe. This takes you to the Metadata Editor, which has its own toolbar. This editor always opens with the *metadata* view first; there is also a *classification* view. For more information on classifying resources, see below under section 3.2 Classifying a Learning Resource.

The illustration below shows the Metadata Editor with three metadata fields (*Title*, *Description* and *Technical Format*) filled in for a resource:



Filling in Metadata Fields

IntraLibrary allows administrators to set up the system to fill in some of the metadata fields automatically, so you may see some fields filled in already. You can select which metadata fields you wish to see in the Metadata Editor by using the drop-down menu in the toolbar. Usually one of the options to select is *mandatory* (as in the example in the illustration above); if you select this option you will only see those fields that you *must* fill in for the resource to be moved to the next stage in its workflow. You can, however, select any viewing option for the metadata, and fill in those fields that are available to you. In any view of the metadata in the Editor, mandatory fields are indicated with an asterix. Because all three metadata fields shown in the illustration above are mandatory, they all have asterixes next to them.

Saving Metadata

There are three options for saving metadata in the Metadata Editor toolbar: *save*; *save and exit*; and *exit editor*.

- Select *save* at frequent intervals when creating and editing metadata to ensure your work isn't lost. You can click the *revert metadata* button in the left-hand screen at any time to undo any unsaved metadata; however, once you have saved there is no *undo* button.
- Selecting *save and exit* allows you to go back to your *reserved* list having saved your work so far.
- Selecting *exit editor* allows you to return to your *reserved* list without saving any work.
- You can also select *revert to saved metadata* in the left-hand Metadata Editor Tools screen to get back the metadata you most recently saved.

Saving Time by Reusing Metadata

IntraLibrary offers you several ways of reusing metadata from other resources when cataloguing a new resource. Some resources may be very similar, for instance, a set of images of the same thing by the same photographer, or a set of slide shows for the same course by the same lecturer. These tools allow you to save time when cataloguing such similar resources. The tools, which are available in the left-hand screen of the Metadata Editor (see illustration above), are as follows:

- Apply template
- Copy metadata from external file
- Copy metadata previously saved from another resource in intraLibrary.

Apply template: A template is a document in XML format that allows the system to automatically fill in any number of metadata fields or classifications for a resource. Your administrator may have made one or more templates available in the system. For instance, there may be a default template that is applied to general resources, and another template that is applied to a special collection, or a specific resource type, such as all videos or photographs. If this is the case, these templates will appear in a drop-down menu under *apply template from* in the Metadata Editor Tools screen. NB: If there is more than one template in the system, you can select one of these to be your own default metadata template; this will always automatically populate resources you upload with metadata. To set your own default template, click on *profile*, then *preferences* in the main toolbar at the top of the screen. Otherwise, to apply a template:

1. Go to the drop-down menu under *apply template from* in the Metadata Editor Tools screen.
2. Select the template you wish to apply from the drop-down menu.

3. Click on *apply template*.

The metadata fields for your resource will be automatically filled in by this template. You can still edit this metadata for the new resource, and add additional metadata, once you have done this.

Copy metadata from external file: IntraLibrary allows you to save the metadata record for any resource in the library to your local file system in XML format. Then, when you are in the Metadata Editor, you can use this saved metadata when cataloguing a new resource. NB: You can also use other IEEE or IMS metadata XML files that you have created or saved from other XML, metadata or content packaging tools. To download and reuse metadata:

1. Click on the *Download Options* button next to the resource whose metadata you wish to save: .
2. Click on *Advanced* and select the relevant metadata download option (either in IMS or LOM format: consult your local administrator if you're not sure).
3. Save the XML file to your file system.
4. Alternatively, save a metadata file from another source to your file system.
5. When creating metadata for the new resource you are working on in the Metadata Editor, select *from external file* under the *copy metadata from* option in the left-hand screen.
6. Browse your local file system to select the XML metadata file you have previously saved.
7. Click on *copy metadata*.

The metadata from the XML file you selected will fill in the relevant metadata fields of the resource you are working on. You can still edit this metadata for the new resource, and add additional metadata, once you have done this.

Copy metadata previously saved from another resource in intraLibrary: IntraLibrary allows you to copy the metadata record for any resource in the library. Then, when you are in the Metadata Editor, you can use this copied metadata when cataloguing a new resource. To copy and reuse metadata:

1. Click on the *View Object Information (Metadata)* button next to the resource whose metadata you wish to copy: . This will open a metadata view screen.
2. Click on the *Copy this metadata* link at the top of the metadata view screen. A message will appear at the top of this screen: ***this metadata has been added to your***

copy buffer.

3. When creating metadata for the new resource you are working on in the Metadata Editor, select the relevant metadata record by title from the drop-down list under the *copy metadata from* option.
4. Click on *copy metadata*.

The metadata you previously copied will fill in the relevant metadata fields of the resource you are working on. You can copy any number of metadata records in this way; they will stay available to you in your *Work Area* until you have logged out of the library. You can still edit this metadata for the new resource, and add additional metadata, once you have done this.

Preserving live fields: For each of the above options for reusing metadata, certain important metadata fields from the existing metadata for the new resource (known as *live fields*) will be preserved. If you wish to overwrite these metadata fields, you can unselect the *preserve live fields?* option. Consult the *help* screen and your local administrator's instructions for more information.

Next Steps

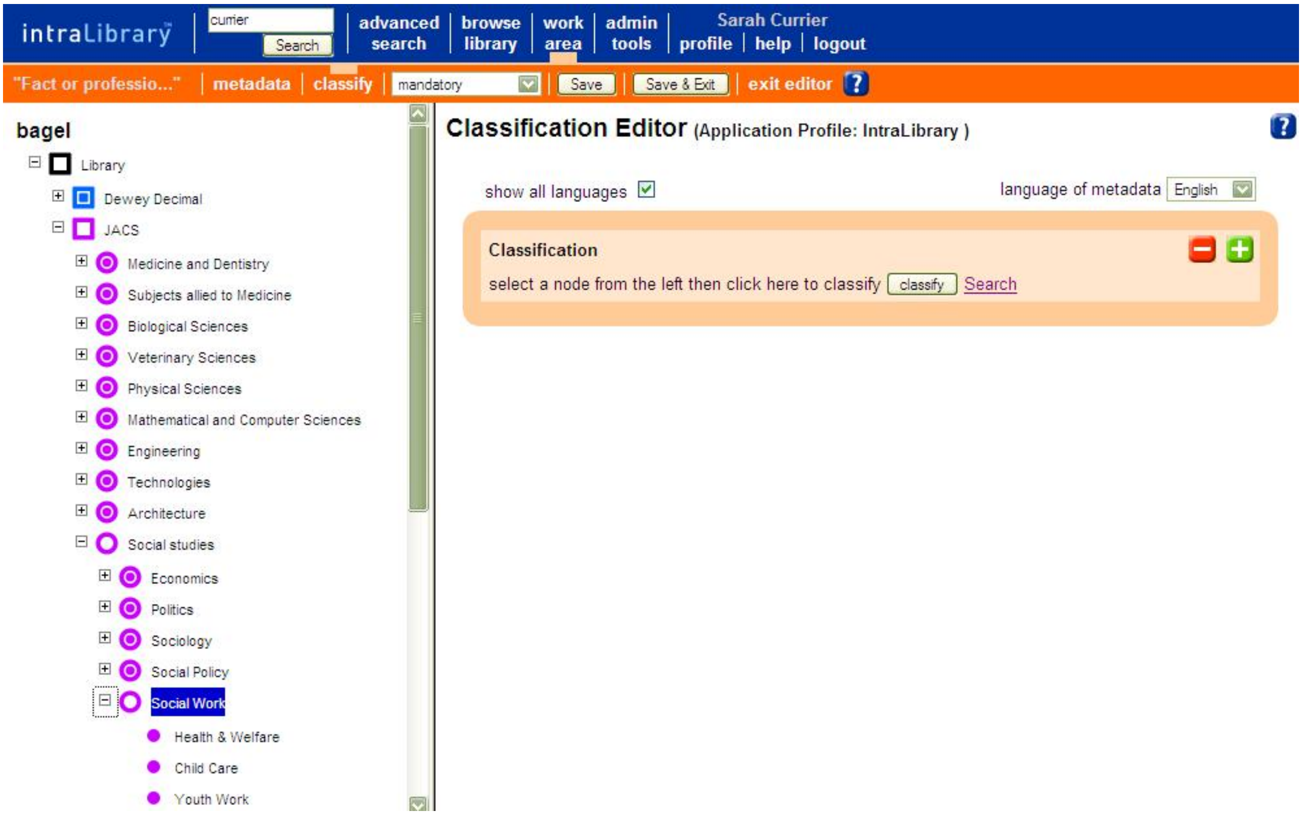
- While creating or editing metadata, it is possible to classify the resource at any time by going into the Classification Editor. For more information see below under section 3.2 Classifying a Learning Resource.
- Depending on what tasks you are required to do within a workflow, you may also be responsible for adding copyright and conditions of use information to the resource. If this is the case you will see the *Edit Rights* button under the resource in your *reserved* area: . For more information see below under section 4 Licensing, Copyright, and Conditions of Use Information for Resources.
- Once you have completed all of your workflow tasks, you can move the resource to the next stage in its workflow. For more information see below under section 5 Publishing: Making a Learning Resource Available to Others in the Library.

3.2. Classifying a Learning Resource

Classifying a learning resource allows users to find it by browsing through the library's browse tree, as an alternative to searching. You can add any number of classifications to a resource. The classifications go into the resource's catalogue record, or metadata; you can see what classifications a resource has been given by clicking its *View Object Information (Metadata)* button: .

If you have copied metadata from another resource as described above in section 3.1 Creating and Editing Metadata: Cataloguing Resources in the Library, or if your administrator has set up your system to apply a template with classifications in it when you upload a resource, then there may already be classifications for the resource.

To classify a resource, click on *classify* in the Metadata Editor toolbar. You will then see the Classification Editor, with the available classifications displayed as a browse tree on the left-hand side:



Finding and Selecting Classifications

There are two ways to classify your resource:

1. To explore the classifications in the browse tree, use the "+" and "-" buttons to move through the hierarchy as when browsing for resources. When you have found a suitable category, click on its title, as in the illustration above, which shows a user selecting "Social Work" from the JACS classification scheme. Then click the *classify* button in the right-hand screen. The classification details will appear in the right-hand screen.

2. To search the classification tree for suitable categories, click the *Search* link next to the *classify* button. In the pop-up window that appears, type a keyword or phrase, and click *Search*. You will be presented with a list ofoptions from the classifications available. You can then select one or more, or all of these classifications by clicking the appropriate checkboxes, and clicking *classify*. The classification details will appear in the right-hand screen.

Saving Classifications

There are three options for saving your classifications in the Classification Editor toolbar: *save*; *save and exit*; and *exit editor*:

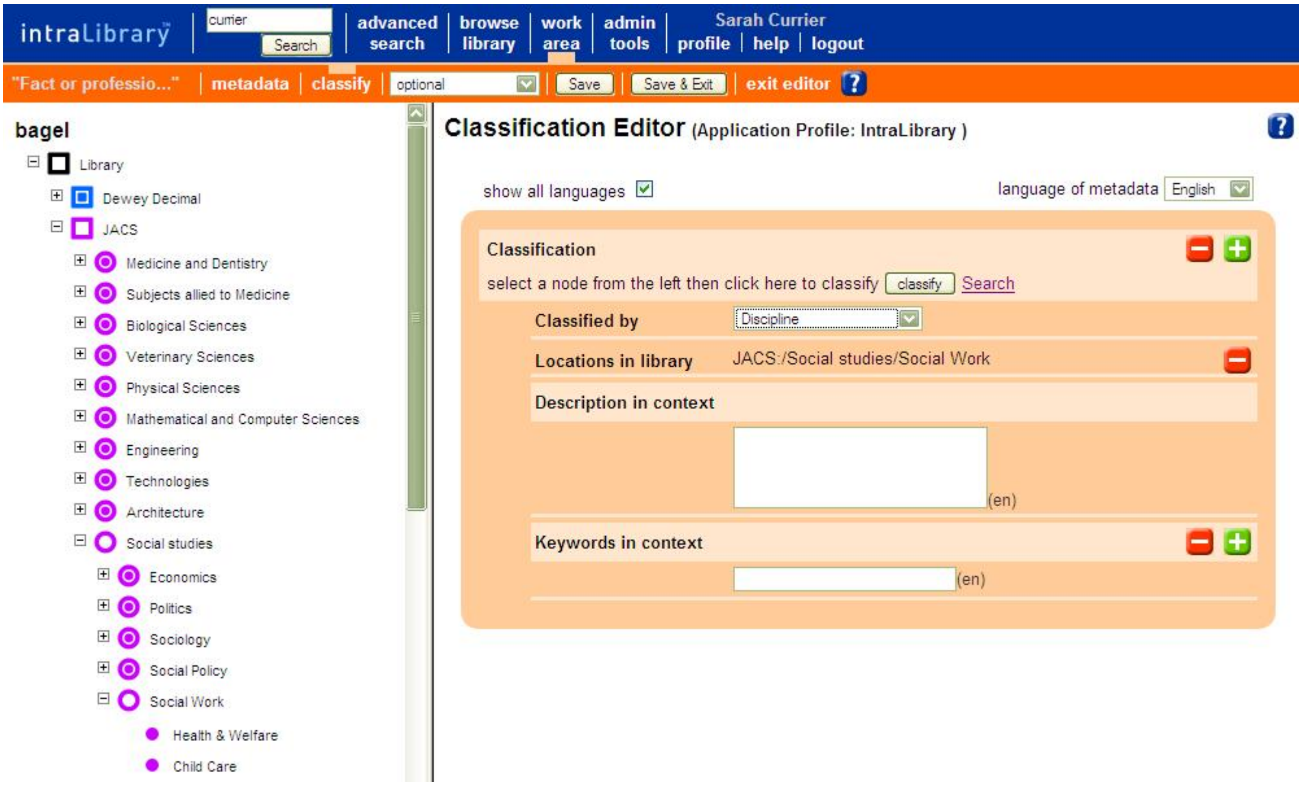
- Select *save* at frequent intervals when creating and editing classifications to ensure your work isn't lost.
- Selecting *save and exit* allows you to go back to your *reserved* list having saved your work so far.
- Selecting *exit editor* allows you to return to your *reserved* list without saving any work.

Adding Extra Classification Information

IntraLibrary allows you to add extra information about each classification you give to a resource. Your local administrator will have determined whether you can do this; consult their guidelines for more information. In some cases the extra information will be mandatory, in which case you will see the relevant fields to be filled in when the *mandatory* view option is selected in the Classification Editor toolbar. In some cases the extra information will be optional, so you will need to select the appropriate viewing option from the drop-down menu in the Classification Editor toolbar to see and add these extra fields. The extra fields are:

- Classified by
- Description in context
- Keywords in context.

The illustration below shows the Classification Editor after the user has added the classification "Social Work" from the JACS classification scheme to a resource, and has selected "Discipline" from the *Classified by* drop-down menu. This means that they have classified the resource by the educational discipline *social work*; they could also have classified the resource by such aspects as *educational level* or *educational objective*. This illustration also shows the other two additional fields, which are yet to be filled in:



Next Steps

- While creating or editing classifications, it is possible to edit the resource's metadata at any time by going into the Metadata Editor. For more information see above under section 3.1 Creating and Editing Metadata: Cataloguing Resources in the Library.

- Depending on what tasks you are required to do within a workflow, you may also be responsible for adding copyright and conditions of use information to the resource. If this is the case you will see the *Edit Rights* button under the resource in your *reserved* area: . For more information see below under section 4 Licensing, Copyright, and Conditions of Use Information for Resources.
- Once you have completed all of your workflow tasks, you can move the resource to the next stage in its workflow. For more information see below under section 5 Publishing: Making a Learning Resource Available to Others in the Library.

4. Licensing, Copyright, and Conditions of Use Information for Resources

IntraLibrary allows rights information to be added to a resource's metadata, including copyright, licensing, and terms and conditions of use information. Because rights information is so important, it is vital to check with your local guidelines as to how to complete this part of the workflow.

Adding Basic Rights Information in the Metadata Editor

IntraLibrary allows basic rights information to be added through the Metadata Editor in the *Rights and Conditions* fields. See your local administrator's guidelines for more information, also see above under section 3.1 Creating and Editing Metadata: Cataloguing Resources in the Library for how to add metadata.

Adding Licences and Rights Information in the Licence Editor

Your local administrator may also have set up your library to add more detailed rights information. If they have, and if you have been assigned the task of adding this information in your workflow, you will see an *Edit Rights* button under the resource in your *reserved* area: . Clicking on this button will take you to the Licence Editor screen. Here you will see a list of licensing options on the left-hand screen under *Select Licence*, and some metadata fields on the right-hand screen. In some cases, you have to select a licensing option on the left in order to see the appropriate rights metadata fields on the right. Some of these fields may already be filled in by a metadata template created by your local administrator.

Saving Rights Information in the Licence Editor

Once you have selected the appropriate licence for the resource, and checked and completed the additional rights metadata fields, you can save the rights information. There are three options for saving rights information in the Licence Editor toolbar: *save*; *save and exit*; and *exit editor*.

- Select *save* at frequent intervals when creating and editing rights information to ensure your work isn't lost.
- Selecting *save and exit* allows you to go back to your *reserved* list having saved your work so far.
- Selecting *exit editor* allows you to return to your *reserved* list without saving any work.

Next Steps

- It is possible to edit the resource's metadata and classifications in the Metadata Editor before or after creating and editing rights information. For more information see above under section 3.1 Creating and Editing Metadata: Cataloguing Resources in the Library.
- Once you have completed all of your workflow tasks, you can move the resource to the next stage in its workflow. For more information see below under section 5 Publishing: Making a Learning Resource Available to Others in the Library.

5. Publishing: Making a Learning Resource Available to Others in the Library

The purpose of intraLibrary is to enable sharing of learning resources among a group of people. Therefore, the end result of uploading a new resource is to eventually make it available to others. Making a resource available to others in the library is known as *publishing* the resource.

In intraLibrary 2.8, your local administrator can define multi-stage workflows for submitting resources to the library. A resource is *published* when the necessary stages in the workflow are completed. In the basic workflow outlined above, the resource may be published after upload, cataloguing, classification and adding rights information. In any case, when you have completed your part of a simple or complex workflow, you must click the *submit completed process* button . If a process has not been completed, this button will appear faded out, like this: . If you click on the faded-out button, a box will open up telling you what needs to be completed for the resource to be moved to the next stage.

When you have successfully completed your stage in the workflow for a resource, you will see a message at the top of your *reserved* area telling you which workflow process has been successfully completed. If the resource is published at this stage you will also see a message saying: ***The object below has been successfully published to the repository***.

If you have access to the *next* stage in a resource's workflow, it will still appear in your *reserved* area after you have completed the initial process.

It is possible for a resource to be in a workflow (and thus visible in your *Work Area*) and to be published at the same time.