



## Intralex intraLibrary 2.7: Quick Reference

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## Intralex intraLibrary 2.7: Quick Reference

### 1. Introduction

Welcome to your installation of **intraLibrary**.

Find out more about the system by reading these pages.

If you've never used the system, you should read these introductory pages first to help orient yourself. As you will discover, what you can do in the system depends on what [role\(s\)](#) you have been assigned by the administrator.

In general, any kind of digital resource is referred to as an "object" within the system and these help pages.

#### 1.1. About intraLibrary


**IntraLibrary** is designed to be a library for [learning objects](#), but it can be used to store digital objects of any kind.

In general, any kind of resource is referred to as an "object" within the system and these help pages.

IntraLibrary makes it easy to share and re-use objects within or between organizations. The library stores [metadata](#) with each object to make it easier to find objects that are relevant to your work.

#### 1.2. About Help

This is where the different interfaces you will encounter in the system are explained. Just click on the link to the section you're interested in.

When you are using the library, clicking the  icon will open a relevant section in the help interface.

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### 1.3. Your role in the library

In the library, users can have several different roles :

- *Normal Users* can search and browse the library to find objects they are interested in.
- *Contributors* have an [Work Area](#), where they can upload and describe objects.
- *Librarians* can manage the classification system and manage the contents of the library.
- *Administrators* can manage user accounts, and configure the system.

### 1.4. Finding the parts of help relevant to you

If you are a normal user, the following sections will be relevant to you:

- [Finding objects](#)
- [Using objects](#)
- [User Profile](#)

If you are a contributor, the following additional sections will be relevant to you:

- [Work Area](#)
- [Describing an object](#)

If you are a librarian the following sections will be relevant to you:

- [Managing Classification Systems](#)
- [Managing the Contents of the Library](#)

### 1.5. Contributors to earlier versions of the system

If you have been used to contributing objects to previous version of the intraLibrary system, you will notice some changes. The most important ones are detailed here.

## Work Area

What was the "Upload Area" is now called the "Work Area". This is to reflect the fact that you can now do much more in this area than just upload objects in a single step. You can

still do everything you could in previous systems.

### Publishing Objects

The system can now be configured with a multi-stage "workflow" for submitting and publishing objects. However, by default, the system will still work with the single stage you are used to. Some of the icons that control the publishing process have changed to reflect this new complexity:

## 2. Finding Objects

There are several ways to find objects in the library :

- **Simple Search:** This search is always available from the persistent navigation bar at the top of the interface. It is designed to be as simple as possible to use, and give you useful results whenever possible.
- **Advanced Search:** This is more sophisticated search interface. It requires some understanding of the structure of the metadata fields. Its very useful for targeted searches, when the simple search returns too many hits.
- **Browse Library:** Explore the online library as if you were walking around the shelves of a physical library.

The result of any search or browse operation is a [List of objects](#)

### 2.1. Simple Search

#### Searching for objects

You can search the library for keywords and phrases wherever you see this simple form :

Simply type the keywords or phrases that apply to the object you are trying to find, and click "Search". The objects that match your search will be returned in the ["Search Results"](#) with the best matches listed first.

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## Keyword Search

You can search for objects which match a keyword, or list of keywords, such as :

history Rome Caesar

More keywords will give you more results, but also increase the relevance of the first results.

## Phrase Search

You can search for objects which match a particular phrase, such as :

"history of Rome"

This is a more constrained search than using a list of keywords.

## Richer Queries



Richer queries are supported, including wildcards and logical operators. For more information, see the full ["Query Syntax"](#).

### 2.2. Advanced Search

Advanced Search allows you to do sophisticated searches using various fields in the library's catalogue. For example, you can search for an object by a specific author or for a specific type of object, such as a PowerPoint presentation.

## Choosing Search Constraints

Select "Advanced Search" and you will see a form the left-hand pane for defining constraints on your search. Metadata fields can be selected from the "Choose Constraint" drop-down. Depending on the type of field you select, you will be offered either a box for text entry or a drop-down vocabulary (see below).

 button to add more. Remove constraints by clicking the  button. Choosing to match "ALL" criteria will give you a narrow search. Choosing to match "ANY" criteria will give you a broad search.

Example:

- >Choosing "ANY" criteria for a search for "title": fish and "title": chips will give you all objects in the library with either word in the title, including objects on computer chips and wood chips that don't even mention fish. Choosing "ALL" criteria for the same search will only return objects with the words "fish" and "chips" in their titles.

## Collections

There may be multiple collections of objects in the library. By default, the system will search all collections you have access to. If you prefer, you can constrain your search to cover a specific collection only.

To constrain your search by collection, select "choose collection" from the drop-down list of fields. A box will appear that containing a list of the collections you have access to, so you can choose the collections you would like to search.

## Text field

You can search many of the individual fields in the metadata for free text. If you select a text field from the drop-down list, and a text box will appear below it. Type the keywords or phrases you want to search for into the text box.

Example:

- In a collection of art objects, a Simple Search for "warhol" would return all objects with any mention of Andy Warhol in them. If you only want to see Andy Warhol's own work rather than works about Andy Warhol, you could type "warhol" into the text box for the "contributor" field.

## Vocabulary field

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Some fields in the catalogue use a standard vocabulary. You can constrain your search by selecting values from these vocabularies.

If you select a vocabulary field from the drop-down "Choose Constraint" menu, a box will appear below it allowing you to choose your search term from the standard vocabulary.

Example:

- To see all objects in PDF format, select *Technical Format* from the "Choose Constraint" menu on the left, and *application/pdf* from the standard vocabulary list on the right.

You can combine searches of text fields and vocabulary fields. For instance, you could choose to search by both the above examples, matching "ALL" criteria, and the search will return all objects in PDF format by Andy Warhol.

## 2.3. Query Syntax

### Phrase Search

You can search for objects which match a particular phrase, such as :

"history of Rome"

This is a more constrained search than using a list of keywords.

### Wildcards

You can use \* as wildcard character in search queries, such as

Rom\*

This example would match any word that started with "Rom", including Rome, Roman, Romany etc.

In search queries, the ? character is also a wildcard character, used to match a single character only. For example, you could search for

Br?an

This would match "Brian" and "Bryan" but not "Brendan".

### Logical Operators

You can combine keywords and phrases using the logical operators *AND*, *OR* and *NOT*. For example:

Rome AND Caesar

This would find objects matching both "Rome" and "Caesar".

Rome OR Caesar

This would find objects matching either "Rome" or "Caesar" (default).

Rome NOT Caesar

This would find objects matching "Rome" but not matching "Caesar" (default).

### Grouping Search Clauses

You can use brackets to group search clauses. This can give you more control over the logic for a query. For example:

(italian OR spanish) AND opera

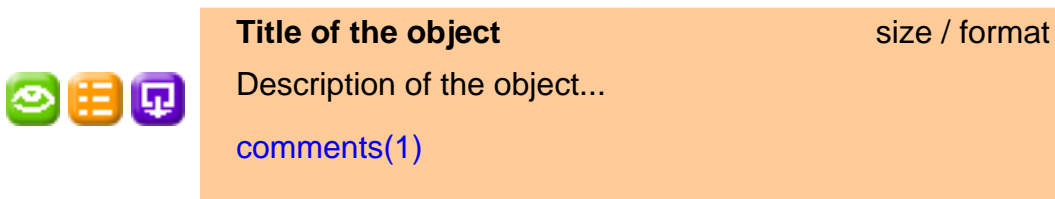
This would find objects referring to "opera" including either the word "italian" or the word "spanish".

## 2.4. Search Results

### List of Objects

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The result of a search operation is a list of objects which match the terms you entered. The most relevant objects are returned first. Each object is listed in the following format :



You can click on the icons alongside each object to initiate various operations on the object, such as previewing the object, or viewing its metadata. See the [Icon Glossary](#) for the meaning of each icon.

## Monitoring the results of a search

For any search query you can [create a news feed](#) which can be used to monitor the changing results of the search query. The feed can be monitored in any compliant RSS reader, feed aggregation service. Typically the feed will grow as new objects are added to the library with match your search criteria.

## 2.5. Search Filters

Search Filters are a way of storing and re-using previous search criteria. They help you get quick access to your commonly used searches, and then modify these criteria if you choose.

To save a search:

- Define a set of search criteria in the [“Advanced Search”](#) interface
- Try the search, and modify the criteria until you are happy you are getting the results you expect
- Enter a name for your search filter
- Click "save" to store the named search

To retrieve a saved search filter:

- Select your search filter by name from the list in the drop-down list below "choose

search filter"

- The criteria you previously defined are now displayed in the advanced search interface
- Click "search" to see the search results

To modify a saved search:

- Select the saved search by name, as above
- Edit the search criteria in the ["Advanced Search"](#) interface
- Click "search" to test the new search criteria
- You can update the existing search filter by saving the modified search criteria under the same name
- Alternatively, you can save your modified search criteria as a new search filter by saving them under a different name

## 2.6. Browse the Library

### Library Browse Tree

The library can be browsed using a tree of classifications (or "taxonomies"). You can browse this tree wherever you are in the system by clicking on "Browse Library" in the navigation bar.

When you first open this interface you will see the following:

- The name of the library is given at the top left.
- Below that, the first "library" section represents the library as a whole.

If you open the "library" section (see below) you will see:

- One or more classification systems you can use to browse the library
- When there are multiple classification systems in use, they are displayed alongside each other using different colours.

To browse the library :

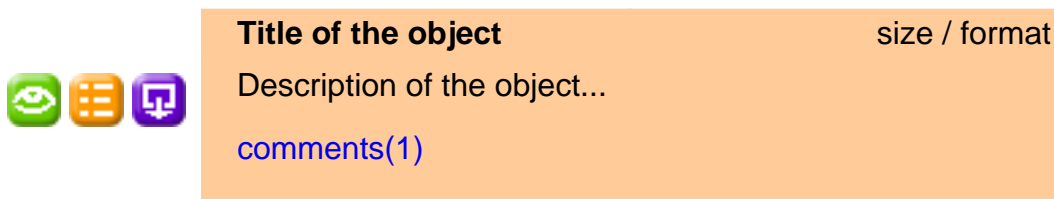
- Use the controls in the left-hand pane to navigate the tree structure.
- Sections can be open or closed using the  and  buttons.
- Click on the title of a section to display the [list of objects](#) it contains in the right-hand pane.

---

## 2.7. Browse Results

### List of objects

The result of a browse operation is a list of objects which match the terms you entered. The objects are listed alphabetically by object title. Each object is listed in the following format :



You can click on the icons alongside each object to initiate various operations on the object, such as previewing the object, or viewing its metadata. See the [Icon Glossary](#) for the meaning of each icon.

### Finding objects in the library

When you click of the title of a section you will see a list of objects which are classified in that section. The title of the section is displayed near the top of the right hand pane.

You have two choices:

- see a list of objects only within the section you are looking at
  - see a list of all objects within and below that section, including any sub-sections.
- The number of objects you would see is shown against each option. The second option is useful when you are browsing through the top-level of the classification tree, because it helps you decide which parts of the tree are going to most useful ones to explore.

Example:

A library might have a section called "History of Art" which contains 11 objects, but which has several subsections, such as "Art of the Twentieth Century", which in total contain 154 objects.

Please note that the numbers indicate the number of unique objects within or below a section, not the number of classifications of objects. An object may be classified in more than one sub-section, but it will only be counted once.

### Monitoring a section of the library classification

You can [create news feeds](#) to monitor the changing contents of a section of the library classification. The feed can be monitored in any RSS-compliant feed reader or feed aggregation service. Typically the feed will grow as new objects are added to that section of the library.

## 3. Using objects

The result of a search or browse operation is a [List of objects](#) which match the terms you specified. The following actions are available to all users :



[Preview object](#) : open the object in your web browser.



[View Metadata](#) : opens a pop-up which lists all the metadata recorded for the object.



[Download object](#)

### 3.1. Preview object




When an object is previewed, a pop-up window will open which gives you access to the structure of the object. In the left hand frame of the pop-up, you can choose which view of the object you prefer:

- **Organisation View:** the structure the author(s) intended you to see
  - **Resource View:** a list of all the "pages" and other essential components in the object.
- These three views are described in detail below. They offer different ways of selecting which component you want to see. Components you select are displayed in the right hand frame.

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## Organisation View (default)

One or more organisation trees may have been defined by the author(s) of the object. You can browse these trees to select which parts of the object are of most interest to you.

- Open and close parts of the tree(s) using the  and  buttons.
- Click on the title of a section to see its contents in the right-hand frame.
- If the object itself is "published" in the library, a [Public URL](#) pointing to an individual section can be obtained by clicking the  button.

## Resource View

Each object contains a list of "resources". These are the building-blocks that are used to construct the *organisation view*. The *resource view* displays a list of these objects in the left-hand frame.

- Each object can be previewed individually by clicking on the  button alongside its filename.

## Viewing SCORM Content

The library system displays the "tree" view of SCOs by default. The system has client-side support for the SCORM Runtime API, but no information will be exchanged with the server.

### 3.2. View Metadata

This page lists the complete metadata record for the object

You can copy metadata so you can re-use it in the metadata editor by clicking the "copy this metadata" link

### 3.3. Downloading an object

When you click on the download button, you see various options for downloading an object. The options that appear depend on the type of object that it is.

### Download single file

If the object is a single file, you are given the option to download this directly to your file system by clicking this link. If your browser does not present you a download prompt when clicking on the link, you will need to right-click on the link to get an option to "Save Link As..." or "Save Target As...".

### Download the object as an IMS Content Package

A stored object can be exported as an IMS Content Package. This will return a .zip file for download, which conforms to the [IMS Content Packaging](#) specification. The package contains all the files in the object and the associated metadata records. This .zip package can be imported directly into other systems which support the [IMS Content Packaging](#) specification.

### Download the object as a SCORM Package

Objects imported as SCORM packages can be re-exported as SCORM packages. This will return a .zip file for download, which conforms to the [SCORM packaging model](#). The package contains all the files in the object and the associated metadata records. This .zip package can be imported directly into other systems which support the [SCORM 1.2](#) specification.

### Download the Metadata Only

The metadata record of the object can be exported as an XML file. An exported metadata record can be used in the following ways:

- importing metadata records into another cataloguing system
- copying or re-using metadata
- creating a metadata template

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Metadata can currently be exported from the library in the following formats:

- Learning Object metadata (LOM), using the [IMS Metadata](#) binding
- Dublin Core metadata, using the Open Archives Initiative (OAI) binding
- Learning Object metadata (LOM), using the [IEEE LOM XML binding](#).

## Public URL

The "Public URL" can be used to point to an object that is inside the library. You can use a Public URL as a link in web pages just like any other URL. Anyone will be able access the object from outside the library using the Public URL, not just registered users of the system.

There are two types of Public URL:

- A Public URL that returns the preview of the object
- A Public URL that returns a complete content package as .zip file

To copy and use a Public URL:

- Right-click on the URL with your mouse.
- Select "copy" from the menu that appears.
- Test the URL by pasting it into the location field of a new browser window.
- You can paste the URL into any HTML editor or web-design application.

NB: Public URLs include an encrypted key which could be used by the library administrator to identify which user made the Public URL available.

### 3.4. Comments

This is where users of the library can share there thoughts about objects and how they have used them.

## Viewing comments

Click the [comments](#) link in the object listing and a pop-up window will appear listing any existing comments.

### Adding comments

You can make comments on any object that you see. Add your comment by:

- clicking on the comments link
- typing into the text field
- optionally add a star rating (see below)
- clicking "add comment"


Your name and the date when you make the comment will be automatically recorded.



### Star ratings

You can record how valuable or useful you think an object is by rating it from one to five stars. "No rating" means you choose not to give a star rating, not "no stars".

### 3.5. Creating News feeds

If you want to monitor or publicise parts of the library, then you can create a news feed. Everytime you access a news feed, it will return an up-to-date list of objects which match the parameters of the feed. Each object will be listed with a title and description, and a link to the [Public Preview URL](#). There are many applications that can automatically monitor news feeds for you, alerting you when new objects have been added. These applications include specialised "feed readers" or "RSS readers", but some browsers and email clients also now include this feature.

Its quite straightforward to create a news feed. Whenever you get a list of learning objects, as result of a [search](#) or [browse](#) operation, you will see a link to "create news feed". If you click on the link, you will see a pop-up window asking you to enter a title and description for the news feed. When you submit this information, the page will reload with a summary of the feed, and a  image, which is a link to the URL of the feed.

You can drag the  link into another application, such as an RSS feed reader. If you want to use the link in another way, such as post it on a website, or email it to someone, just right click on  and select the menu item to "copy shortcut" or "copy

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link location"; the exact wording depends on your browser.

News feeds generated from intraLibrary conform to the ["RSS 2.0" specification](#).

## 4. User Profile

Your user "Profile" is an area where you can personalise parts of your user account. You reach it by clicking "profile" under your name in the persistent navigation bar.

### 4.1. User Preferences

This is the part of your [user profile](#) where you can set various options about how you want the library system to behave.

#### Object list size

Set the number of objects you prefer to see in a single page of your search results. A smaller number of objects will require less scrolling, but more moving between pages when you are viewing a large result set.

#### Default object view

There are two options:

- simple view of single files: when the object only contains one file or link, this will be shown without the package structure view (default)
- always show package view: the package structure is used for all objects, including objects containing only a single file

#### Metadata template

If you are contributing objects to the system, you can select a default [metadata template](#) that will be applied whenever you upload a file or add a new "web resource". Your system

administrator may have made a list of templates available for you to choose from.

### Send notification email

You can choose to be sent a confirmation email whenever you publish an object so others can see it.

### Default Search Filter

You can create and store [search filters](#). The administrator(s) of the library can make "Public Filters" available they think might be useful to their users. If you want to filter all of your search and browse results by one of these filters, you can select it by name from this drop-down list. You will see a warning in the search and browse listings that you have this filter switched on.

### Default timeout

If you not active in the library for a certain time, your log-in "session" will expire (time out). You can change how long your "session" takes to time out through inactivity, by changing the value in this drop-down.

**Warning:** The longer you make this time, the more susceptible your account will be to interference if you forget to log-out when you leave your desk.

### Reduce mime-type list?

This affects what you see when you are using technical format as a search constraint in an [Advanced Search](#). Selecting "yes" here means you only be presented with a list of mime-types that have been applied to current objects in the library. Selecting "no" means you will see a longer list of mime-types.

## 4.2. Agreements

---

This section allows to review any usage agreements you have accepted to get access to certain functionality in the library. You can choose to reject any of these agreements, but you will not have access to that functionality in future sessions unless you accept the usage agreement again.




### 4.3. User Group Alerts

If you are in the contributor role, and a member of a user group, you will have a "groups" section in your user profile. This is where you can choose whether or not to subscribe to alert emails for that user group.

You see a list of groups in which you have a role in a submission workflow which would cause you to receive alerts. By default, you will receive alert emails when an object is moved into a stage of the workflow to which you have access. If you do not want to receive emails from a group, click the "no" button, and click "Update Group Alerts".

### 4.4. Manage News Feeds

Once you have [created a news feed](#) you will always be able to access it from the "news feeds" section of your user profile. Each feed you have created is accessible from this area. You can view the results of a saved news feed by clicking "view results". If no longer want to expose a particular news feed, you can delete it by clicking the "delete" button.

If you want to use or share the URL of the news feed, it is available as a link from the  image. You can drag the  link into another application, such as an RSS feed reader. If you want to use the link in another way, such as post it on a website, or email it to someone, just right click on  and select the menu item to "copy shortcut" or "copy link location"; the exact wording depends on your browser.

## 5. Working on objects in the Work Area

### Introduction

For an object to be submitted to the repository, it must pass through all the stages of the chosen submission workflow. The workflow used by a user group is chosen by the administrator.

When all the processes at a workflow stage are marked as completed, the object will be moved on to the next stage. Users who have access to the object at the next stage will receive an email alerting them that there is a new object to work on. You can configure these alerts in [groups](#) section of your user profile.

### The "upload" section

To add an object to the library, you use the "Upload" section Work Area. You can add several different [types](#) of object.

### The "available" section

Users must reserve an object before they can work on it. Once they have reserved the object, it moves to their reserved area and the actions in the workflow processes become available.

### The "reserved" section

In the reserved area, a button is shown for each of the actions in each process. There is also a button to indicate that the process has been completed. The user can work on the object in various ways: edit metadata, manage licensing etc. When you have completed your work, and met any criteria on the metadata, you click the button to declare the process as completed.

#### 5.1. Upload an object

The "upload" section of the "Work Area" is a form for adding objects to the library.

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You can add several different [types](#) of object. The procedure for adding each each type of object is given below. If you are able to upload objects in the context of more than one user group, you need select which group you want the object to belong to.

By default, uploaded objects will appear in your list of reserved objects. If you deselect the "reserve object" checkbox, uploaded objects will appear in your list of "available" objects.

## File/Package

To upload a single file or content package (.zip) file :

- Select the "file/package" object type.
- Click the "Browse" button and select a file from your filesystem.
- Optionally enter the title you want to appear when the object is listed. The default title is the name of the file.
- Click the upload button.
- There will be a delay while the file is uploaded. The length of the delay depends on the size of the file and the speed of your network connection.
- If an uploaded zip file is recognised as a content package, the contents of the package will be read into the system. If there are any problems with the package a "details" link will displayed. Clicking this link displays a conformance report for the content package.

## Web Resource

To add a reference to a web resource :

- Select the "web resource" object type.
- Optionally enter the title you want for the object.
- Click the upload button.

## Physical Resource

To add an entry for a physical resource :

- Select the "physical resource" object type.
- Optionally enter the title you want for the object.
- Click the upload button.

## 5.2. Reserved objects

The "reserved" section of the [Work Area](#) lists all the objects you have chosen to work on.


If you are a member of more than one group, and/or have been given access to more than one stage of a workflow, you might see a long list of objects. You can choose to list only some of these objects by using the drop-down lists labelled "Filter Objects". Follow the following steps to filter the list:

- optionally select a pre-defined [search filter](#)
- optionally select a group and workflow stage
- optionally choose how many objects you want to see in a single page
- click the "Filter" button

The resulting list of objects will include only those that match your filter criteria. The state of the filters will persist across the reserved and [available](#) areas during your current login session.

All the objects you have reserved are listed in the following format:



You can click the  icon to "unreserve" the object. This sends the object back to the "available" section of the work area.

The bottom line of the listing, where it says "Review Metadata" in this example, refers to the workflow processes that are available on the object:

- There will be one or more processes listed here.
- Each process is shown on a separate line.
- A button is shown for each of the actions that are part of the process.

There are separate instructions on how to [complete a workflow process](#).

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### 5.3. Available objects

The "available" section of the [Work Area](#) lists all the objects you can choose to work on. This area is shared with other members of your group. You only see objects that your group and role membership give you access to.


If you are a member of more than one group, and/or have been given access to more than one stage of a workflow, you might see a long list of objects. You can choose to list only some of these objects by using the drop-down lists labelled "Filter Objects". Follow the following steps to filter the list:

- optionally select a pre-defined [search filter](#)
- optionally select a group and workflow stage
- optionally choose how many objects you want to see in a single page
- optionally choose to include objects that other users have reserved
- click the "Filter" button

The resulting list of objects will include only those that match your filter criteria. The state of the filters will persist across the available and [reserved](#) areas during your current login session.

In the "available" section, the objects are listed in the following format:



You can click the  icon to "reserve" the object. This puts the object into the "reserved" section of your work area. No one else can now work on this object until you have "unreserved" it again.

### 5.4. Upload Types

The different types of objects that can be stored in the library are as follows :

## File

A single file, which has been uploaded into the library. This can be in any digital format, but you probably want to use formats you know other users will be able to read, such as PDF, images and office documents.

The file could be a .zip file, which is a compressed archive of other files. However, if the system recognises the zip file as being a content package, it will attempt to import it as a package (see below).

## Package

A package of files stored in according to the IMS Content Packaging standard. This allows you to store a collection of files in a single learning object. For example you might have a series of web-pages which include images and interactions.

A content package is uploaded as a .zip file. Information about the purpose and structure of the object is stored in the "manifest" of the package. A compliant package must include the file "imsmanifest.xml", which must be a valid according to the IMS Content Packaging specification or the SCORM Packaging specification.

A validation report will be returned each time a package is uploaded. If there are a lot of errors in the package, you will see a link to a pop-up where the errors are listed. If the errors are too fundamental, the package will be rejected entirely.

## Web Resource

An learning object which is used to store information about an object which is outside the library. You will be prompted with a field to enter a URL for web location of the object.

## Physical Resource

An learning object which is used to store information about a physical resource. You will be prompted to fill in a location field with physical location of an object, like the shelfmark of a

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book or video tape.

## 5.6. Default Workflow

Many installations of the intraLibrary repository will use the "default workflow". This is a very simple workflow is enabled by default when the system is installed.

The default workflow replicates the one-stage workflow available earlier versions of the intraLibrary repository.

## 5.7. Object History


When an object progresses through a workflow, information about any event that might affect its position in a workflow is recorded in its workflow history. These events include every time a user invokes the "move" action or marks a process as completed. You can see a summary of this information by clicking the "view history" link on an object in the [reserved](#) or [available](#) areas.

The "object history" page includes the following information about such events:

- Date: The date the event occurred.
- Time: The time the event occurred.
- Previous Group: The group that controlled the object before the event.
- Current Group: The group that controlled the object after the event.
- Previous Stage: The workflow stage the object was in before the event.
- Current Stage: The workflow stage the object was put into after the event.
- Process: The workflow process the event occurred within.
- Event(s): Details of what event occurred.
- By User: The user who triggered the event.
- Comment: Comments made by the user that are associated with the event (if any).

# 6. Describing an object

## Metadata and Classification Editors

When you click on the "edit metadata" icon  this takes you in to the metadata and classification editor. This always opens in the [metadata editor](#) first. Click on "classify" to see the [classification editor](#)


When you open it, the metadata editor shows a certain set of metadata fields. Further fields can be revealed by changing the "optionality" level in the drop down list in the toolbar of the metadata editor. The mandatory fields are always shown with a star against the field name.

Example:

If the editor opens with just the "mandatory" fields, you can choose to also see all the "recommended" and "optional" fields by selecting "optional" from the drop down list.

The library administrator can set the "optionality" the editor opens with. The optionality of each of the fields is configurable by the library administrator as part of the [application profile](#).

## Invalid Vocabulary

If an object has been imported with invalid vocabulary in its metadata the  sign will be displayed in the toolbar. Click this and you will go into the [Invalid Vocabulary Editor](#)

### 6.1. Editing Metadata

#### Metadata Editor

By default the metadata editor shows just the minimum fields - the "mandatory fields" - that are required to publish an object into the library. This list of fields is configurable by the library manager.

More fields can be revealed by selecting the "optionality" of the displayed fields in the drop-down list. Possible values are "mandatory", "recommended", "optional",



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"not-recommended" and "not-used". Each one reveals more fields than the last.

There will typically be some fields that have already been populated automatically by the system depending on the "template" you have selected in your user profile. Others need to be completed by based on your knowledge of the object you are describing. It is important to save the changes you make to metadata fields before you exit the editor.

Fortunately, you don't have to create all metadata from scratch. The intraLibrary system includes various ways of [re-using metadata](#), such as copying metadata from other objects.

## Multiple Instances of Metadata Fields

Several metadata fields can occur more than once in a record. For example there may be more than one author of a resource, or it may have more than one technical format. Use the  and  buttons to add or remove instances of a field.

Sometimes whole sections of the metadata can be added and deleted in the same way. For example, there can be more than one type of "contribution" to an object. Each contribution can also be the work of more than one person or organisation. For example, a resource may be a joint publication of a commercial publisher and an educational institution, in which case both of these need to be recorded as "publisher" under "contribution".

### 6.2. Classify object

This is where you choose where your object should appear in the library classifications. The left-hand pane shows the tree structure of the library classifications. The right hand pane shows a list of the sections of the library you have chosen. Every object must have at least one location in the structure of the library before it can be published.

## Editing the classification of an object

To classify the object :

- Use the "+" and "-" buttons to move through the classification tree as when browsing for objects.
- When you have found a suitable category, click on its title, and then click the "Classify" button in the editor on the right-hand side. The classification details will now be added to the list on the right-hand side.
- You can remove the path again by clicking the "-" button.
- You can add or delete paths as you see fit, so you can have the object in more than one place.

### Finding Classifications

If you are not sure what classifications are available in the library, and want some hints, you can search for a word or part of a word that is likely to appear in the title of the section you are looking for. Click the "search" link, and type a search string in the search pop-up and click "Search". If there are any sections matching this string, they will be returned in a list. You can select the matched sections individually, or choose all or none of them.

### 6.3. Re-using Metadata

To avoid you having to re-enter the same metadata over and over again, the library system enables you to re-use metadata in several ways. Any of these methods of reusing metadata may involve overwriting some of your existing metadata, including the classification information. The system will do its best to [merge new metadata with your existing metadata](#) in a sensible way.

*NB: In the following operations, certain fields, called "live fields" will not be overwritten, unless you uncheck the "preserve live fields" checkbox. A list of these fields is given at the bottom of the page.*

### Apply Template

Any of the pre-defined [metadata templates](#) can be applied. Select the template by name from the drop-down list and click "apply template". Some of your existing metadata, including the classification information, could be overwritten if you do this.

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## Copy Metadata

Metadata can be copied from other other objects in the library, or from external metadata files.

You can copy metadata from any object that you have added to your metadata clipboard. When you first log-in your clipboard will be empty, and the drop-down list will only include the option "from external file". To add an object to your metadata clipboard:

- by clicking a link when you [view the metadata](#) for the object

To copy metadata from an object in your metadata clipboard:

- select the title of the object from the drop-down list; i.e. any value in the list except "from external file".
- click the "copy metadata" metadata

Metadata can be copied from external XML files which are compliant with the [IMS Metadata](#) specification or [IEEE LOM](#). To copy metadata from an external metadata file :

- Select "from external file" from the drop-down list. The "Browse" button will become active.
- Click the "Browse" button and select a metadata file from your filesystem.
- Click the "copy metadata" button.
- There will be a short delay while the file is uploaded.
- If the metadata file is valid, you will see the editor has been populated with the new metadata.
- You can now edit or save this new metadata as normal.

## Clear Metadata

Click this button to clear all the existing entries in your metadata record, \* including classification entries \*.

## Revert Metadata

Click this button to return to the version of the record that was most-recently saved.

### Live Fields

There are some fields in the metadata, called "live fields" that are never overwritten, because they are normally very specific to an object. The live fields normally defined for the [IMS metadata model](#) are:

- general.title
- general.catalogentry
- metametadata.catalogentry
- technical.format
- technical.size
- technical.location


#### 6.4. Merging Metadata

All the methods of [re-using metadata](#) involve merging existing metadata in the *target* record with new metadata from another *source* record. This page summarises the rules the library system applies when merging metadata from a *source* record and *target* record.

The rules for merging metadata are different for metadata fields which can have a single instance only, called "single fields" here, and metadata fields that can have multiple instances (cardinality), called "multiple fields" here. The intraLibrary system applies a general rule that information should be preserved whenever possible.


#### 6.5. Invalid Vocabulary Editor

Metadata can sometimes be imported into the library which has values which are not part of the vocabularies the library system recognises. The Invalid Vocabulary Editor is used to fix these entries.

In the Invalid Vocabulary Editor, each field which contains any invalid entries will be listed. Fields which have a value which is not part of a recognised vocabulary will be marked with a  symbol. Each field has a drop-down list of possible values alongside it.

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To fix the invalid entries:

- Go to each invalid entry in turn
- Select a valid value from the drop-down list
- Save your changes
- When you have saved all the fields with valid values, the  symbol will disappear from the metadata editor toolbar.

## 7. Choosing a Community License

The *license editor* allows you to select the licence conditions under which you make their object available to others. There will be a set of one or more licences from which you can choose to apply to your object.



### 7.1. Select a License

The available licenses are listed in the left-hand pane. Each one has a radio button next to it. There will be either icons or a text link to represent the licence. Clicking on the icons or link can take you to an online copy of the full license agreement.

Click the relevant radio button to select your preferred license. Sometimes other fields will appear in the right-hand frame. For example, you might be asked to supply the identity of the copyright holder(s) for the object. If so, you need to fill in these fields before the choice of license is complete. When you have saved all the necessary information, the license action has been completed.

### 7.2. Edit properties of license

For the license you have chosen, there may be some fields that you need to complete. You edit these in exactly the same way as the normal [metadata editor](#). Make sure you save your changes before you exit.

Some licence fields can be assigned multiple values. Use the  and  buttons to add

or remove extra value for a field.

## 8. Librarian Tools

Users in the "librarian" role can manage the classification system and remove objects from the library. The following sections describe how to use these tools.

### 8.1. Adding a Classification System

There are various issues you should consider when choosing classification systems for your library. There is more information about this in the "Librarian Guide for intraLibrary", which is provided with the system.

#### Adding a New Classification System

- Click on the "edit" button in the [Browse Library](#) view, and the editing tools will become active.
- Click on "Library" to select the top-level section.
- Click the "+" button to add a classification system.
- Enter a name and source for the classification system, and click the "add" button to insert it.
- The classification tree will reload, and you should find the root section of your classification system inside it.
- You will probably know if you want to add individual sections (see below) or [import an existing classification system](#).

#### Source of a Classification System

The source of the classification system is the most important property it has. This ID is used by library systems to identify the classification system. Using a recognised code makes the classification parts of the metadata portable between systems.

The [MARC subject codes](#) are a recognised set of identifiers for classification systems. If you

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are not using a recognised source ID for your classification system, it is important to agree with other users of your chosen classification system on what the source ID should be.

## 8.2. Editing the Structure of the Classification Systems

These tools can be used by users in the "librarian" role to edit the structure of classification systems used in the library. Also see the instructions for [adding a new classification system](#).

### Entering "edit mode"

When you are browsing the contents of the library, the editing tools are deactivated, and appear like this :



To edit the structure of the classification systems, click the "edit" button. The editing tools are now activated, and appear like this :



When you are in edit mode, the properties of the sections "[Properties of the Sections](#)" will be displayed on the right hand side.

### Editing the structure

Select a section by clicking on its title. You can choose to delete the section, add a sub-section, or cut-and-paste the section into a new position in the classification structure.

The following functions are available :



*Add* : Create a new sub-section inside the selected section.

*Delete* : Delete the section. Only allowed if a section is empty.

*Cut* : Move the section and its contents to



where "paste" is applied.

*Paste* : Paste the contents of a "cut" into the selected section.

*Import* : [Import a classification system](#).

## Adding Your First Section

- Click on the "edit" button in the [Browse Library](#) view, and the editing tools will become active.
- Click on the name of the classification system.
- Click "Add" to add a section at this level.
- Enter a name and ref id, and click the "add" button to insert it.
- The classification tree will reload, and you should find your section inside the root of your classification system.

## Deleting a Section

You can delete any section, including sections which contain sections, or a whole classification system. To do this, click on the name of the section you want to delete, and click the delete button.

If any of the section(s) you want to delete have been used to classify objects in the library, you will get a warning asking if you want to force deletion. If you click "Ok", you will no longer be able to find these objects by browsing the deleted classification sections, but you can still find these objects in other ways.

### 8.3. Properties of Library Sections

When you are the classifications used in the library, the properties of any section you select appear in the right hand frame.

Sections of the library classification have the following properties:

- name: the title of the section

- 
- ref id: the reference number used to identify this section in a shared classification scheme.
  - use for: one or more phrases that are alternative descriptions of the section. Any text entered here is shown in the tool tip that appears when you mouse over the section name. You can add multiple use-for entries.
  - description: a longer description of the meaning or purpose of the section. Any text entered here is displayed at the top of the results page, when you click on the section name in browse mode.

When no objects are classified against this section, you can edit any properties that are displayed. To save your changes click "apply". To reject your changes and revert to the stored properties click "revert". The long description field can always be edited.

Classification systems have the following properties:

- name: the title of the section
- description: a short description of the origin, meaning or purpose of this classification system. Any text entered here is shown in the tool tip that appears when you mouse over the classification name.
- colour: the colour you want to use for the section icons.
- order by: whether you want to order the sections are listed in to be alphabetical by section name or by reference id.

When no objects have been classified, you can edit any properties that are displayed. To save your changes click "update". To start again, click "clear".

## 8.4. Importing a Classification System

Users in the librarian role can import new classification systems into the library. To be understood by the intraLibrary software, a classification system must be defined in a format called [ZThes](#).

To import a classification system:

- Add the root node of the classification system as described in "[Editing the structure of the classifications systems](#)".
- Click on the name of the classification system and click *edit* in the classification toolbar
- Click the icon to open the import window
- Browse your file system and select your ZThes file.
- Click the "Import Classification System" button.
- If your file is a valid ZThes file, you should see your classification structure appear

below the root node of the classification system. Otherwise you will see an error message.

## 9. Managing the Contents of the Library

Users in the "librarian" role can control the published content of the library.

### Librarian functions on objects

Users in the librarian role have access to extra functions on learning objects in an [list of objects](#):



The "move" function. Enables you to send the object into a the workflow of a specified group, with comments attached. Also gives you the option of changing which collections an object belongs to.



Delete this object from the library



Lets you see the current workflow status of the object, for example its group and workflow stage. Includes a link to "unreserve" objects that have been reserved by a user. This icon is not shown if the object is not currently in a workflow.


### Collaborative management of the library contents

The "move" function creates a lot of options for managing the contents of the library. For example, the move function could be used to pass an object into a workflow with one of the following purposes:

- Reviewing the metadata on the object.
- Reviewing the content of the object.
- Reviewing the licence conditions on the object

- 
- Deciding about unpublishing the object.
  - Deciding about deleting the object.


### 9.1. Move object

A user in the librarian role can move a published object into any stage of any workflow in the library by clicking the  button. They can attach comments to the object before they do this. These comments are included in the alert email that is sent to users who have access to this workflow stage.

Moving the object into a stage of a workflow where the state is "unpublished" causes the object to be "unpublished". This means users can no longer find the object in search and browser operations. A librarian user should therefore be conscious of the "published state" of the stage to which they moving the object to.

This feature also allows a user in the librarian role to change the collections an object is associated with. A librarian user should be conscious that changing the collections of an object might affect which users can get access to the object.

### 9.2. Delete object

If you have sufficient privileges to delete an object, the system will display the delete button . If you click the delete button, you will be given a warning message, and the opportunity to click "Ok" to go ahead or "cancel". Clicking "Ok" causes the object to be **irrevocably removed** from the library.

If you want to stop an object appearing in its current location, but don't want to delete it altogether, you can often use the [move object](#) button instead.

## 10. Administration Tools

These help pages provide some information about the features of the the "Admin Tools".

Detailed information is available in the separate "Administrators Guide" document, supplied with the system. All user in the "administrator" role are advised to read this document before proceeding.

### 10.1. User Administration

This is the where the users of the system are administered. In this area you can:

- add users
- edit properties of users
- delete one or more users
- assign one or more users to a group
- log-in using another user's account
- search for users

### Searching for users

You can determine which users accounts you see by changing the search parameters at the top of the page, and clicking search. The following parameters are available (from left to right):

- string matched in any of the following user properties:
  - first name
  - surname
  - username
  - affiliation
  - email address
- role(s) in the repository
- group membership
- number of results per page
- status (logged in/not logged in)

For example, to search for users with email addresses from the Univeristy of Edinburgh:

- type ed.ac.uk in the left-hand box
- choose how many results you would like to see
- click the "search" button to see the results

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## Further information

More detailed information about user management and authentication is available in the "Administrators Guide" supplied with the system.

### **10.2. User Group Management**

This is the area where the user groups are managed. User groups are used to associate users together for the purposes of:

- enabling users to work together using workflows
- controlling users access to collections

They are two main parts to this area:

- adding, deleting and editing groups
- adding, deleting and editing group roles

## Further information

More detailed information about managing user groups, roles and workflows is available in the "Administrators Guide" supplied with the system.

### **10.3. Managing Workflows**

## Further information

Detailed information about managing workflows is available in the "Administrators Guide", supplied with the system.

### **10.5. Metadata Application Profiles**

This page lists all the metadata application profiles that are currently available in the system. Application profiles that are "active" can be applied to collections and groups. The

"default" application profile is the application profile that is pre-selected for new groups and collections.

Detailed information about application profiles is available in the separate "Administrators Guide" document, supplied with the system. All user in the "administrator" role are advised to read this document before proceeding.

### 10.6. Configure Search

Administrators of the system can change which metadata fields are included in the simple search and advanced search. Select the required fields by clicking the checkbox in the appropriate column, and click the "submit" button at the bottom of the page to save the changes.

Changing the fields for the simple search changes which fields are indexed for this search. It is therefore necessary to go to the [system page](#) and re-index the metadata after changing these fields.

Changing the fields for the advanced search simply changes which fields appear in the drop-down list of fields in the advanced search interface.

### 10.7. License Models

This page lists the license models that are currently available in the system. Each license model consists of one or more "[license templates](#)".

For more details about applying license models to the system, see the "Administrators Guide" document supplied with the system.

### 10.8. Usage Agreements

Usage agreements are used to enforce a policy on usage of the repository system or its

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contents. This page lists all the usage agreements currently in force in the system. For more information about creating and managing usage agreements, please consult the product documentation.

## 10.9. System Attributes

This page provides some information about the state of the system, and allows various properties of the system to be changed. Detailed information about these features is available in the separate "Administrators Guide" document, supplied with the system. All users in the "administrator" role are advised to read this document before proceeding.

## 10.10. Reference materials

These materials are supplied as a quick reference guide. More details are available in the product documentation.

## 10.11. Glossary of Icons

### Using Objects



Preview the object



View the metadata for the object






Download object

### Work Area



The following are the most commonly used features in the work area. There is also [a complete list of workflow actions and their icons](#).






This object has not met the process completion criteria (click to see the reasons why).

-  Complete the workflow process. This normally sends the object to the next stage of the workflow.
-  Delete this object from the Work Area
-  Overwrite the existing object with an uploaded object

### Describing an Object

-  Edit the metadata of this object
-  Licence editor to define licencing conditions for an object

### Librarian Functions (when seen outside "Work Area")

-  Send the object into the workflow of a specified group, with comments attached. Can result in "unpublishing" the object
-  Delete this object from the library
-  See the current workflow status of the object, for example its group and workflow stage. Includes a link to "unreserve" objects that have been reserved by a user. This icon is not shown if the object is not currently in a workflow.

## 10.12. Glossary of Terms

### Application Profile

An application profile of the [LOM](#) sets out which fields of the LOM are relevant to a particular group of users. Projects or institutions use an application profile of the LOM to make sure all their users are using at least a minimum set of metadata fields in common.

An application profile of the LOM can:

- define a core set of mandatory fields
- assign various levels of "optionality" to metadata fields
- require vocabularies for particular metadata fields which differ from the standard LOM vocabularies

### IEEE LOM XML Binding

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The [IEEE LOM](#) has been a recognised standard for [metadata](#) for learning objects since 2002. In 2005 the IEEE released a standard XML binding for the LOM, replacing the previous [IMS binding](#). The latest versions of the IMS Metadata specifications, and the [SCORM reference model](#) (SCORM 2004) both apply the IEEE XML binding of the LOM.

### IMS Content Package

IMS Content Packages consist multiple files and their associated [metadata](#), combined into a single .zip file. Content Packages are defined according to a specification by [IMS Global](#). The latest specification is available for download from the [IMS website](#).

See Also [IMS](#).

### IMS Metadata

IMS Metadata is an implementation of the [LOM](#) standard in XML. The latest specification is available for download from the [IMS website](#).

See Also [IMS](#).

### IMS Global

The IMS Global Learning Consortium is a leading body for creating specifications for interoperability in e-learning. For more information, see the [IMS website](#)

See Also [Learning Object Model \(LOM\)](#), [Content Package](#).

### Learning Object

There are many different definitions of a learning object. The most general is that it is any digital object that could be used in a learning scenario. Normally the term implies that the object has a degree of reusability, and has been described using [metadata](#).

### Learning Object Metadata (LOM)

The LOM is a recognised standard for [metadata](#) for learning objects. The LOM standard is recognised by the IEEE and is used as part of the IMS and SCORM sets

of specifications for e-learning interoperability.

The [LOM](#) metadata model consists of a large number of fields, not all of which are relevant to every scenario. According to the LOM standard, all the metadata fields are optional. The fields you use in practice are defined in an [Application Profile](#).

See Also [IEEE LOM XML Binding](#).

### Metadata

Metadata is "data about data". It is used to record information about an object, to make it easier to find and re-use.

See Also [Learning Object Model \(LOM\)](#).

### SCO

A SCO is a "Sharable Content Object". This is a package of interactive learning material, which conforms to the SCORM specification (see below).

### SCORM

The SCORM reference model is developed by [ADL](#). The SCORM reference model combines and extends various other learning technology specifications including IMS Content Packaging, IMS/LOM Metadata and the AICC's content runtime environment.












Intrallect intraLibrary supports the import, preview and export of content packages which meet the SCORM 1.2 specification and the SCORM 2004 specification.


## 10.13. Workflow Actions

This page lists all the "actions" that are available to be included in any workflow process. The workflow you are using may well only use a subset of these.

Some actions may have completion criteria such as conformance to a subset of an application profile, or matching one of a set of licence patterns.

## Summary of Workflow Actions

| Icon  | Name                            | Description  |
|---|---------------------------------|--|
|    | Edit Metadata                   | Metadata/classification editor configured by the chosen Application Profile, and an optional metadata subset.  |
|    | Edit Licence                    | Licence (rights management) editor   |
|   | Move                            | Send the object to another stage of the workflow, with comments attached. Typically used at review stages.   |
|  | Complete Process                | Sends the object to the next stage of the workflow, unless there are other (parallel) processes that have not yet been completed.                                      |
|  | Download                        | Download the object in various ways  |
|  | Upload                          | Upload or add a new object to the system. Access to this action, activates the "upload" section of the Work Area.  |
|  | Overwrite                       | Upload a new version of an object to the system  |
|  | Delete                          | Remove an object completely from the system  |
|  | Preview                         | Package/file preview   |
|  | Return object to previous state | Puts the object back into the workflow and published state it had before it entered the current workflow. Used to enable a withdrawal, revisioning or review workflow. |
|  | Save to filesystem              | Writes the a .zip package of the object to a pre-defined location on the server filesystem. Can be used to export object for ingest by a separate                      |

|   |                             |  |
|---|-----------------------------|--|
|   |                             | system.  |
|  | Save manifest to filesystem | Writes the package manifest of the object to a pre-defined location on the server filesystem. When present in a process, must be performed before process can be completed. Can be used a trigger for a server-side alert mechanism. |

### 10.14. IMS and LOM Metadata

The following table relates all the metadata fields in the IMS Metadata model to the IEEE Learning Object Model (LOM). The label the field is given in intraLibrary is also included in the central column.

\* When mapping IMS Metadata to IEEE LOM for output, intraLibrary maps the old IMS identifier fields to the "entry" field of the IEEE LOM identifier, leaving the "catalog" field blank. Likewise, identifiers in imported IEEE LOM metadata which have no value for "catalog" will be mapped to the equivalent IMS identifier field, instead of "catalogentry".