

# Using ICO Cataloger/Photocat



## Short Cuts

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[ICO Cataloger/Photocat](#) is a web-based application that allows descriptive metadata entry for items managed by the IU Libraries' fedora preservation repository. Once a collection has been made "live" through the [ICO Portal](#), catalogers and administrators of collections in ICO Cataloger also control when content is published to the Web.

## Definitions

- **Collection** - Groups of materials in ICO Cataloger are grouped into "collections". A collection is a group of materials for which one particular set of metadata is collected. Typically all items in a collection are the same type of materials.
- **quick search form** - Once a collection has been selected, there is a search form at the top right-hand corner of the pages that allows searching of the records in that collection. This form will be referred to in this documentation as the "quick search form".
- **navigation menu** - Once a collection has been selected, links to "Search", "Browse", "Vocabulary Sources" and "Batches" appear in a gray bar. This is referred to as the navigation menu.
- **search results page** - An array of thumbnail images (possibly with identifiers and a title) is presented as the results of a search or browse operation. Controls to page through these results as well as a search form are presented as well.

## Permissions

There are two levels of permissions for ICO Cataloger/Photocat users: Administrator and Cataloger.

- Administrators can:
  - do all the things catalogers can do (see below)
  - delete records (no undo options; can re-create record as a way to recover)
  - make bulk/batch updates to metadata records
  - download master images (useful when patrons request a master image for publication or other purposes)
  - upload multiple images to a record (i.e. provide different views)
- Catalogers can:
  - upload images
  - create/edit records
  - replace images for a record (i.e., an image was uploaded, but was discovered to be upside down)

Contact [Kara Alexander](#) to add new admins or catalogers/remove former admins or catalogers.

## Creating a Collection

Collections are created as the [result of a consultation with IU Libraries staff from Digital Collections Services](#). Metadata fields are selected and digital materials are processed and used to populate the collection.

For more information see:

- [field selection process](#)
- [digitization guidelines](#)

## Logging In

Once a collection has been setup, you will be able to login to ICO Cataloger/Photocat: <http://webapp1.dlib.indiana.edu/photocat2/>. Login requires authorization so you'll automatically be redirected to IU's Central Authentication Service to which you'll supply your IU credentials before being granted access to that page. For users whose work centers around a single collection, the user may bookmark the collection home page and always use that as an entry point into the application. Other users may wish to simply start at the [collection selection page](#).

## Locating Records

Records may be located and viewed using several means.

- **Search:** Searching with no criteria entered will result in a listing of all records in the system sorted by identifier. This may be the easiest way to discover records before metadata has been entered. There is a convenient link on the collection home page to perform this action, but at any time a user may also click the "search" button on the quick-search form having entered no search terms.
- **Browsing by Field Value:** clicking on the "browse" link in the navigation menu will allow you to select fields and navigate to records that have particular values in those fields. For example, clicking on "browse" then "title" will present a table listing all titles entered. For each title you can follow a link to "view records" which will take you to a search results page exposing access to all the records with the given title.

## Editing Records

Clicking on the identifier or thumbnail image in the search results page will take you to a page that allows the metadata for that item to be entered or modified. You can also replace images for any given record. At the top of the page, the identifier is displayed.



### Warning

Multiple people can catalog items in the same collection at the same time as long as they do not alter the same record. A record can only be edited by one person at a time. If multiple catalogers accidentally edit the same records, they will encounter an error when attempting to save.

## Item Preview

On the right side of the page there will be an item preview box containing a visual representation of the item whose metadata is currently being edited. If alternate views or formats are available links to access them will be presented in this preview box. Administrators for a collection will have access to the digital master image.

## Manage Items

### Deleting/Replacing Images

If you wish to replace an image already attached to a record, you must have administrative privileges for your collection. To delete/replace an image, click on the "manage files" link in the Item Preview box. You will be presented with an option to delete the existing image (click on link labeled "Delete"). Once the file has been deleted, you will be redirected to the "Edit View" of the record with an option to upload a new file.

### Adding Multiple Images per Record

**\*If\* your collection was setup** to allow for the uploading of multiple images per record, you will be able to do this in the "manage files" section. Under the heading "Upload Images" you should see an option to upload additional image files. ICO Cataloger currently does not allow for re-ordering of images. If you would like the images to appear in some pre-defined order, you can do this manually by uploading last the images you want to appear first.

## Uploading Files

Files can take anywhere between two minutes to fifteen minutes to upload depending on the level of activity for all users of ICO Cataloger. You will see a status message that reads: "File submitted at Oct 5, 2016, awaiting processing." You can continue to upload files and edit metadata, but you **should check back at some point to make sure your file was indeed loaded**.

## Modification History

If versioning of metadata is enabled and the record has been modified more than once, a "Modification history" box will appear below the preview listing all versions of the metadata for the object. Clicking on a version (which is presented as the date the modification was made) will display a summary of the values stored at that time. By opening two versions and comparing the values, a full accounting of changes may be tracked.

## Transformations

ICO Cataloger stores metadata internally in a format referred to as "item metadata", but often more standard formats are desired. Links to export the metadata of a given record into another format are presented below the modification history. If no transformations are configured, this element will not be presented.

## Metadata Entry Fields

The left-hand side of the "edit item" page is a listing of all of the fields currently configured for items in the selected collection. Values for the current item are exposed for modification and new values may be entered. Changes to fields on this page are only saved when the user clicks a "Save" button (located at the bottom of the page). Clicking on navigation menu links may result in loss of unsaved changes.

- Click on the label for the field to see notes about how the field should be used. These can be customized for your project's cataloging practices.
- Some fields are "repeatable" meaning that multiple values may be entered. To enter an additional value, click on the little blue "+" sign at the right side of the entry box(es).
- Some fields are linked to controlled vocabularies and will automatically suggest values once three letters have been typed into the box
- Some fields require specific formatting, such as the Date field and will disallow improperly formatted values. Upon saving records, helpful advice will be given if invalid values have been entered.
- Some fields are "internal only" meaning that the values are protected from access by unauthorized users. All other fields, regardless of the status of the record are not protected.

## Advanced Searching

Boolean, phrase and wildcard searching is supported in both the quick search form and the search form presented on the search results page. This includes searches like "Dog OR cat", "dog and cat" and "(dog or cat) and monkey", "mon\*", etc.

## Browsing

Locating records with a particular value in a particular field may be done on the browse page. Furthermore, location of records with NO value entered in a particular field is also available.



### Tip

Browse by the "last modified by" to review the work of an individual cataloger.



### Tip

Browsing by status may be used to implement a review process in your workflow.



### Expert Tip

Collection administrators may perform a batch-replacement operation from the browse page. If a value is present in multiple records all of those records may be updated to replace that value with another value or remove it altogether. This allows easy correction of since eradicated bad cataloging practices or migration to a new preferred term.

## Vocabulary Sources

Fields may be linked to one or more controlled vocabulary sources. Furthermore, vocabulary lists may be maintained implicitly by keeping a record of all values saved for a particular field. To see the vocabulary sources and the fields to which they're linked, click on the "Vocabulary Sources" link in the navigation menu.

To browse the terms in the linked vocabulary sources you can click on the value in the "source name" column in the table of controlled or uncontrolled vocabulary sources. To the right, a table will appear. The links that appear at the bottom of that table will allow navigation of the entire set of values. For locally managed vocabulary sources you may also delete any term from the list of values. This will prevent it from being suggested again when a user begins typing in a linked field.

## Batch Operations

A batch of records is simply a list of record identifiers, but allows for operations to be performed asynchronously on multiple records. Batches are accessible using the "Batches" link in the navigation menu and currently open batches are visible in a special place on the right-hand side of the screen. To Open or Close a batch, click the link on the "Batches" page.

Batches can be created in several ways:

- Manually using the form on the Batches page. (just enter a name for the batch and click "Create batch")

- Imported from a spreadsheet
- Created by saving search results.
- Created by other asynchronous operations.

Items may be added to an existing batch on the search results page.

1. Open the batch on the "Batches" page.
2. Perform a search that will include the item in question (possibly just search for its identifier)
3. Click on the checkbox by the item on the search results page.
4. Click the "add selected items to the batch" button for the batch you'd like it added to



#### Warning

Batches may contain identifiers to records that do not exist! This may be because a record has been deleted or a batch that has been uploaded with references to invalid identifiers. Batch operations will fail when they encounter these identifiers.



#### Warning

Record updates will fail if you are updating the same records as part of multiple batch operations. For example, you create a batch update to normalize a subject heading, and you create another batch update to normalize personal names. If a given record is part of both batches, and the batches are executed right after the other, you may encounter an error. When running multiple batch operations, especially across a large number of records, you should execute one batch update at a time.

## Quality Control for Metadata

ICO Cataloger/Photocat provides a record status, "pending review," which facilitates metadata quality control at the record-level, especially if you employ a two-pronged approach to metadata creation: basic description followed by subject analysis. ICO Cataloger/Photocat also provides efficient ways to review data entry by browsing values entered by field. For example, it is not uncommon to catch typos or variant name entries that should be corrected or standardized. When needing to update more than one record, the batch functionality discussed above provides quick ways to update values:

1. Initiate a "Batch replace/remove" for the incorrect term ("W. E. Wood Company," 8 records)
  - a. In the Search and Replace screen, replace W. E. Wood Company with W. E. Wood Co.
  - b. Click "Replace/Remove Values"
    - i. Right-top of screen you will see a status for batch "Operations." The % update will require a refresh to the "Browse" page in a few second to make sure all records were updated.
    - ii. Once updated you should see a message (after you refresh the browser): "Items updated as part of search and replace operation." [with number of items in brackets]
    - iii. Be paranoid every so often and browse by subject to make sure the batch update worked!
    - iv. **Conduct one "batch replace" at a time or you may encounter an error in ICO Cataloger/Photocat**
      1. Make sure all records have been updated before initiating another batch update