

# School of Human Ecology: Digital Asset Management System Guidelines



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## Introduction

A Digital Asset Management System (DAMS) is a centralized repository that aids in the effective management and distribution of large collections of digital materials. The DAMS enables the retrieval, curation, and long-term preservation of digital materials. Benefits for implementing a DAMS include:

- Central storage location for the assets
- Facilitates consistent branding
- Quick search, retrieval, and access
- Dynamic sharing of assets
- Improved workflow efficiency
- Facilitates making use of existing content, saving time and resources

Coordinating with University Marketing and Creative Services (UMCS), the School of Human Ecology (SoHE) will implement a DAMS to house their digital assets, namely digital images and videos. The DAMS will aid in the department's activities, enabling employees to quickly and efficiently locate and employ content they have already created for use.

The following guidelines have been created based on digital preservation best practices and the particular needs of the School of Human Ecology.

Any questions should be sent to Rachel Appel, Digital Asset Manager ([rappel@austin.utexas.edu](mailto:rappel@austin.utexas.edu), 512-232-2324).

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## Assessment

Location: //heco-storage.austin.utexas.edu/hecoshare/Meghan/HE PHOTOS

### Overall organization:

The HE PHOTOS directory contains nearly 67 GB and consists of a large number of folders, approximately 206. Only three image files are not contained within a specific folder (i.e. loose within the top-level HE PHOTOS directory). The number of files within each folder varies from one file to several thousand files (“2012 South Africa” contains 2,879 images). Some folders have deeper levels of folders while many of them just contain a list of files with no further folder hierarchy. Some folders are redundant and empty and could be removed in order to simplify the overall organization.

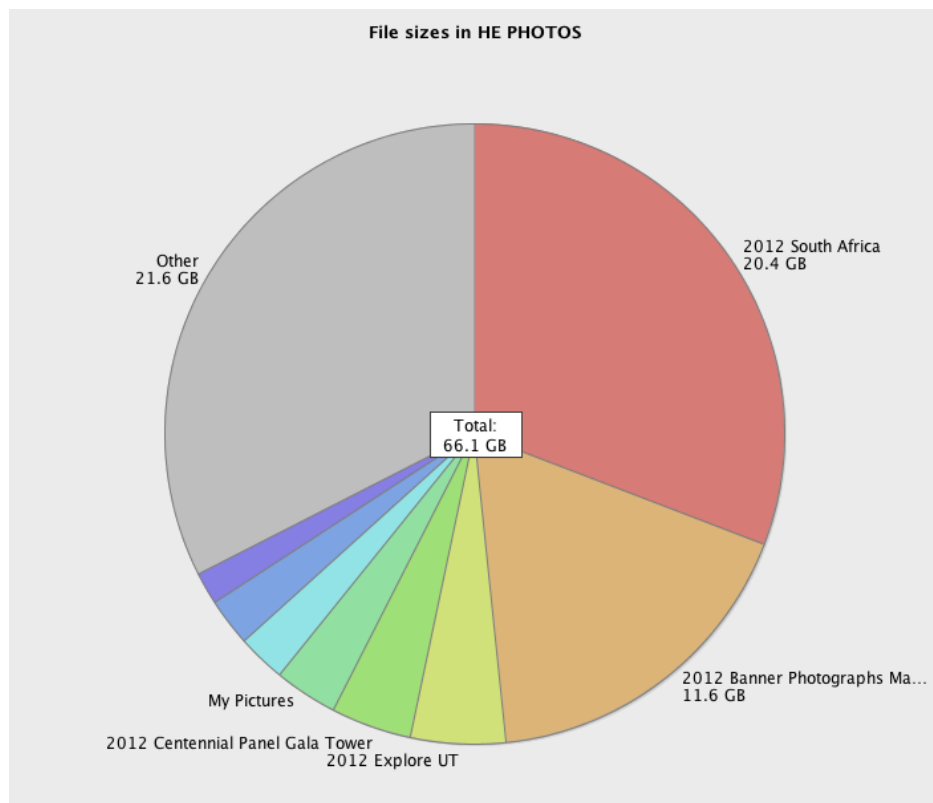


Figure 1: Distribution of file sizes by folder

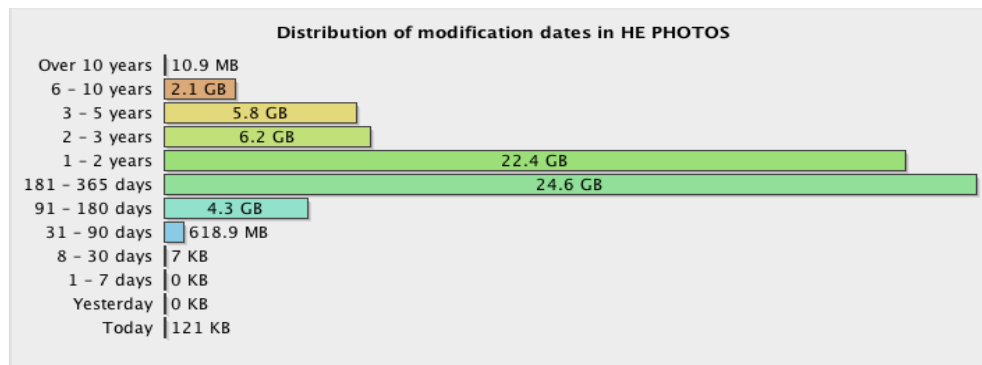


Figure 2: Distribution of files' "last modified" dates. This gives an idea of when files were created or last used.

### Existing naming conventions

Only one person manages digital photos for the School of Human Ecology, which has led to a fairly consistent and well-organized catalog of images and related files. Most folders are named by year, followed by a brief description of the event or subject. This is not entirely consistent, as some folder names begin with the descriptive title, followed by the year, or do not contain a year at all. A few folders have very little descriptive information, including “My Pictures,” “Photos 2-5-2010,” and a few folders titled “Pulled from Camera” with the date of upload. The existing naming conventions for files range from automated camera-assigned names, to descriptive titles and automated numbering, to individually assigned descriptive titles.

Based on this assessment, the central recommendations for improving asset management will be to increase consistency of folder and file naming conventions already in use. In addition, due to the long list of folders, it may be beneficial to add a few higher-level folders to organize the existing files.

### Technical assessment of assets:

File types are a mixture of image, video, document, and other formats. Types of image formats include JPEG, TIFF, PSD (Photoshop), NEF (RAW format from Nikon), AI (Adobe Illustrator), GIF, and BMP (bitmap). Video and moving image file formats include MOV and one M4V file. Other file formats currently in the HE PHOTOS folder include DOC, DOCX, PDF, PPT, HTML and several data file formats including XMP, INK, DB, iPHOTO, PMD, INDD, ATTR, and INK. Only the image and video files will be migrated to the DAMS. JPEG images make up about 90% (16,721 images) of the files, followed by NEF images (1,033 images), which make up another 6% of the total files.

File types in HE PHOTOS					
Extension	File Sizes		% of Total	Files	% of Files
jpg	49.1	GB	74.2%	16,700	90.9%
nef	12.7	GB	19.2%	1,033	5.6%
mov	1.9	GB	2.9%	20	0.1%
psd	890.9	MB	1.3%	82	0.4%
ppt	386.8	MB	0.6%	2	0.0%
ai	314.0	MB	0.5%	14	0.1%
pdf	298.2	MB	0.4%	22	0.1%
tif	218.7	MB	0.3%	13	0.1%
pptx	98.5	MB	0.1%	4	0.0%
db	69.7	MB	0.1%	298	1.6%
m4v	59.0	MB	0.1%	1	0.0%
eps	33.4	MB	0.0%	2	0.0%
jpeg	29.0	MB	0.0%	21	0.1%
doc	20.8	MB	0.0%	8	0.0%
tiff	13.8	MB	0.0%	3	0.0%
pmd	12.2	MB	0.0%	3	0.0%
indd	10.7	MB	0.0%	4	0.0%
bmp	7.4	MB	0.0%	3	0.0%
docx	2.5	MB	0.0%	22	0.1%

Figure 3: Most common file formats, shown by size of files, number of files, and % of total size and of total number

## Catalog & Folder Taxonomy

### Catalog 1: Ecology Private

Human Development and Family Sciences

↳ Year

Nutritional Sciences

↳ Year

Textiles and Apparel

↳ Year

Events

↳ Year

Buildings

Faculty and Staff

Publications

Historic

### Catalog 2: Ecology Images

The public catalog will be set up to mirror the private catalog. Once images are selected for sharing, they should be moved to the public catalog, within the same folder taxonomy.

## Naming Conventions

**YEAR\_#####.extension** (Example: 2013\_000001.jpg)

All digital assets will be named with the year in 4-digit format, underscore, and a 6-digit incremental identifier. This means that digital assets for each year will begin with 000001 and can go up to 999999. At the beginning of the next year, the incremental identifier number can start over.

The original filenames will be transferred to the metadata field, "Identifier: Legacy." This means that the original, meaningful names will be kept with the asset and can be searched for within Portfolio. In addition, the new folder taxonomy and any added cataloged metadata will help everyone easily find the assets.

### Why naming conventions?

As mentioned in the Assessment, the file names for the assets do not follow a single standardized naming convention. File names need to be standardized for several reasons:

- **Unique names:** Each asset must have a unique name to prevent duplication. While your computer may allow you to use the same name for files in different folders, this will cause problems when the files are removed from their folder structure.
- **Digital preservation:** Certain characters can cause problems with some programs and systems, and pose a risk to the long-term preservation of the digital asset.
- **Efficiency:** If all assets use the same naming convention, this will limit confusion over assigning file names to digital assets as well as streamline the ability to rename assets using batch processing. No more manual renaming!

### General file name guidelines

- Use only alpha and numeric characters. Characters that require the shift key (examples: ? [ ] / \ = + < > ; ; ") can cause problems in some systems.
- To make file names more legible, use capital letters or underscores. **Avoid spaces.**
- If you include the date, keep it simple. A year will generally be sufficient, or a date can be represented like this: 20130104 (January 4, 2013)
- Be consistent and be sure that file names are **unique**.

## Responsibilities

Responsibilities have been divided by role to ensure a clear understanding of accountability for the DAMS and encourage accurate and consistent cataloging, management, and system maintenance.

### Digital Asset Manager (Rachel Appel)

- Oversees entire DAMS as custodian
- Responsible for the supervision and assistance for cataloging and developing metadata
- Acts as liaison between the School of Human Ecology and the centralized DAMS at University Marketing & Creative Services
- Develops appraisal and retention schedule for digital assets
- Troubleshoots as necessary with IT staff
- Perform searches for users
- Maintains rights

### SoHE Asset Manager/Asset Creator (Meghan Mullaney)

- Communicates and develops goals with Digital Asset Manager
- Troubleshoots curatorial problems with Digital Asset Manager
- Oversees long-term implementation with Digital Asset Manager
- Uploads materials to DAMS as they are created
- Catalogs and develops descriptive, clear, and consistent metadata for each digital asset using metadata schema
- Updates digital assets as necessary

### School of Human Ecology Content Creators

- Uses the DAMS to search for and retrieve images relevant to their developed content
- Updates the metadata with new information such as when the asset was last used

### Information Technology Services

- Troubleshoots technical problems with Digital Asset Manager
- Provides backend maintenance as needed



## Copyright Guidelines

Users will adhere to the University Copyright Guidelines when selecting and using assets. Each user will need to agree to and sign the Digital Asset Copyright Permissions request forms.

### Terms of agreement for internal requests:

- The images in the Portfolio database may be downloaded and used for university purposes only.
- Unless otherwise stated, all images within the database are the property of The University of Texas at Austin.
- These images may not be shared with other individuals or entities without written permission prior to distribution electronically or in print.
- Any unauthorized commercial use of the photos is subject to applicable state and federal laws.

### Terms of agreement for external requests:

- The University of Texas at Austin's visual assets are protected by copyright (All rights reserved. The University of Texas at Austin) and may not be used without permission.
- When requesting permission, please fill out the Digital Asset Copyright Permissions form and indicate how the asset will specifically be used.
- In most cases, if permission is granted it is done so on a one-time use only basis specifically for the purpose requested in writing.
- University Marketing and Creative Services reserves the right to deny the use of any visual asset based on the assessment of the requests.
- Any unauthorized commercial use of the photos is subject to applicable state and federal laws.

### What should the SoHE do to ensure compliance with Copyright Guidelines?

- See the following section on Security and Access for protocols for using assets, both for internal and external requests.
- Rights metadata should be entered into the DAMS when assets are cataloged (See "dc.Rights" page 14). For most assets, the language will be the same and they can be batch processed.
- When selecting assets for publication usage, check the rights metadata field for any particular restrictions. Images from professional photographers may have differing copyright limitations.
- With regard to the privacy of students, the university is bound by FERPA, a federal law that requires that we have a student's written permission to use his or her image. Photos of students, like other academic records, are considered private and restricted. The Office of Legal Affairs model release is [on the UMCS Digital Asset Management Wiki](#).

## Security & Access

The DAMS serves as secure, centralized storage for the assets. The DAMS will grant SoHE access to other UT Austin catalogs and allow SoHE's assets to be shared with other registered users across campus.

There will be one registered user with access to the DAMS:

- Meghan Mullaney, Public Affairs Specialist

If non-UT employees request assets, the SoHE user will identify the item(s), download them, and send them via email or disk/drive. They will need to submit a Digital Asset Copyright Permissions – External Request form.

If UT employees request the assets, the SoHE user will follow the same protocol, identifying, downloading, and sending the assets along. They will need to submit a Digital Asset Copyright Permissions – Internal Request form.

All user accounts will be created by the Digital Asset Manager. Permissions will depend upon user needs.

### Access Levels

Catalog Administrator: This level allows access to all functionality available. Catalog Administrators have access to advanced operations in the Portfolio Desktop Client, like editing custom fields, metadata mappings, and AutoSync folder settings. Catalog Administrator access should not be confused with the Portfolio Server Administrator, who has access to all server settings.

Publisher: Publishers are able to upload and delete items from a catalog as well as update all metadata for files in the catalog. Publishers can also create galleries.

Editor: Editors are able to modify metadata, such as entering keywords and custom field values. Editor level and above can batch process or download files to their computer.

Reader: Readers may only view items in the catalog and download files. They cannot add or remove items or edit metadata.

## Metadata Overview

*“Without the requisite metadata to accompany each digital asset, the DAMS would be reduced to an unorganized storage system filled with millions of files but no efficient way to search on or to retrieve assets.”<sup>1</sup>*

*“Metadata not only identifies and describes an information object; it also documents how that object behaves, its function and use, its relationship to other information objects, and how it should be and has been managed over time.”<sup>2</sup>*

Metadata (literally “data about data”) is embedded in a digital object so that the information about its creation, subject, use, and format are not lost. Some metadata is automatically embedded, while other metadata is value-added by you. The type of information recorded in metadata is imperative both for the present use and reuse of digital objects, and for their long-term preservation, reliability and authenticity. Comprehensive and standardized metadata is behind any strong DAMS, allowing you to manage, find, use and share your digital assets with ease.

### Types of Metadata

Each digital file will have metadata in the descriptive, administrative, and technical fields. Some fields will be automatically filled, some can be added with batch processing, and others will need to be individually filled. Pre-defined lists of controlled vocabulary can be created using Portfolio to make this task easy.

Descriptive: Metadata used to identify and describe digital assets

Administrative: Metadata used in managing and administering digital assets, including copyright and use information

Technical: Usually automatically embedded in the digital file when it is created, technical metadata may include the camera settings, file format, file size, and capture date. It provides information about the creation of the digital file and about how the computer should render the file.

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<sup>1</sup> Basic Guidelines for Minimal Descriptive Embedded Metadata in Digital Images by EMDaWG (Embedded Metadata Working Group – Smithsonian Institution), April 2010. (p. 2)

<sup>2</sup> Gilliland, Anne J. “Setting the Stage.” *Introduction to Metadata*. The Getty Research Institute, Los Angeles(2008): 7.

## Metadata Entry Standards & Guidelines

This standards guide is a reference for metadata creation for the School of Human Ecology's DAMS, based on Dublin Core Metadata Element Set, 1.1. This guide was adapted from the University Marketing and Creative Service's qualified metadata schema and based on the Dolph Briscoe Center for American History and University of Virginia Library's qualified metadata schemas.

### Bare Minimum Metadata Requirements

The following six fields have been identified as bare minimum requirements. Metadata should be added to these fields, at the very least, for each uploaded asset. They will provide a good baseline of metadata to facilitate refined search within the DAMS.

- dc.Identifier:FileName
- dc.Title
- dc.Creator
- dc.Format:Container
- dc.Source:Location
- dc.Subject:Keywords

### Descriptive Metadata

#### **dc.Identifier:FileName**

**[Mandatory]**

An unambiguous reference to the resource within a given context.

For the SoHE's purposes, this field refers to the file name given by the creator including the file extension. The name should be unique within the DAMS. Controlled vocabulary requires that images be numbered sequentially.

Examples:

- 2012\_000241.jpg
- 2013\_000049.tif
- 2012\_000158.psd

#### **dc.Identifier:Legacy**

The original filename, if it was changed during migration.

Examples:

- DSC\_1331.jpg
- 2011 HTAC Stars Exhibition 017.jpg
- bestgearingxmas08.psd

**dc.Title****[Mandatory]**

A name given to the resource.

Actual formal title of the content or a contrived, brief descriptive phrase.

Examples:

- Façade of Gearing Hall
- Historical Textiles and Apparel Collection exhibition

**dc.Description**

An account of the resource.

Descriptive text about the content of the digital object that describes the scope or content more comprehensively than the title. Be as specific as possible with what information is known.

Examples:

- Fulbright Scholars from 2011-2012 posing for group photo in front of the UT tower.
- Students adjust historical apparel on display at the 2011 HTAC stars exhibition.

**dc.Coverage:Location**

The spatial or temporal topic of the resource, the spatial applicability of the resource, or the jurisdiction under which the resource is relevant.

City, state, and country (if outside of the US) where the object or intellectual content was created. If there are multiple locations the places should be separated by a semicolon.

Examples: (use controlled vocabulary, like TGN—Getty Thesaurus of Geographic Names)

- The University of Texas at Austin; Austin, TX

**dc.Coverage:Date**

Date when the original object was created.

Standardized as: MM/DD/YYYY. If date is unknown, mark as undated. If a date can be guessed, include circa.

Examples:

- 07/07/2011 or 07/2011
- circa 2006
- undated

**dc.Creator****[Mandatory]**

An entity primarily responsible for making the resource.

Name of the original creator (individual, group, organization, or otherwise) who is responsible for the creation of the original object. Should be written as last name, first name, middle name (if commonly used) or full organization's name. It is acceptable to indicate the creator's role in parentheses after the creator's name.

Examples:

- The School of Human Ecology, The University of Texas at Austin
- Haagensen, Sasha (freelance photographer)
- Yorkshire, Alastair (designer)

**dc.Contributor**

An entity responsible for making contributions to the resource.

Name of individual, group, organization, or otherwise who has made contributions to the physical or intellectual content of the original object. Should be written as last name, first name, middle name (if commonly used) or full organization's name, as well as role (designer, editor, etc.).

Examples:

- Freelance Studio Name
- Name of Design Company

**dc.Source:Project**

A related resource from which the described resource is derived.

Project or job assignment from which the original object is a part—based on the convention and name authority used for identifiers; usually an [originating] event name. Include year to distinguish similar projects.

Examples:

- Spring Ice Cream Social 2010
- Jean Andrew's exhibit 2009
- Fashion Show 2008
- Holiday Party 2010

**dc.Rights**

Information about rights held in and over the resource.

Link to a copyright notice or general information on who holds the intellectual property rights for the item, even if the collection is open for research. This field also includes release information.

Examples:

- The University of Texas at Austin
- This material may be subject to U.S. Copyright Law...
- Minimum requirements and extended requirements here
- Name of Design Company

**dc.Source:Location****[Mandatory]**

A related resource from which the described resource is derived.

In Portfolio, dc.Source:Location is used to denote the department/CSU name, server name, and/or folder structure for the physical object where the object is stored.

Examples: [the format is: Department, server name]

- SoHE, heco-storage

**dc.Subject:Keywords****[Mandatory]**

The topic of the resource.

List of keywords that accurately describe the image. General keywords are provided in a drop down list on Portfolio. Users should choose general keywords from the list and include their own descriptive terms as well. Uncontrolled.

Examples:

- Architecture
- Faculty
- Black and White

NOTE: The goal with adding keywords is to be consistent. For instance, don't alternate between variations like US, USA, and United States. Persons' names are always "Last name, First name." See Appendix , Controlled Vocabulary.

**dc.Type**

The nature or genre of the resource.

Classification or categorization of original object. Use Dublin Core type vocabulary. (<http://dublincore.org/documents/dcmi-type-vocabulary/>) Pre-defined drop down list.

Example:

- Image
- Text
- MovingImage

## Technical Metadata

### **dc.Format:Container**

[Mandatory]

The file format of the digital object. Pre-defined drop down list.

Examples:

- TIFF Image
- JPEG Image

### **dc.Format:Alignment**

Field indicating whether the image is horizontal or vertical. Pre-defined drop down list.

Examples:

- Horizontal
- Vertical

### **dc.Format:AudioSamplingFrequency** [Audio only]

The number of times per second the amplitude of the audio wave is measured (sampled), measured in 1000s of times per second, or kilohertz (kHz).

Examples:

- 44.1 kHz
- 96 kHz

### **dc.Format:Duration** [Video and audio only]

The length of time taken by the item rounded to the nearest minute.

Examples:

- 11 minutes
- 1 hour, 35 minutes

## Administrative Metadata

### **dc.Description:DigSpecsModelName** [Photograph/video only]

The model number of the device used to create the original object. Automated.

Examples:

- Nikon 385
- Canon 350

### **dc.Description:LastUsed**

A listing of publications and date where the image was used.

Examples:

- Know Events – Arts and Humanities – Alumni – 02/22/2012
- Students Hooked on Texas – Spring Into Giving – 04/2012
- School of Human Ecology website—12/2012



## Workflow

Assets should be uploaded periodically, but the exact timing is at the discretion of the designated assets manager. This should be done before too many assets stack up in order to not make the process overly burdensome and to ensure that assets are not misplaced in the interim. Be sure to set aside enough time to do the cataloging at the time of upload.

- 1) A staff member or photographer takes photos or videos, hereafter referred to as *assets*.
- 2) Staff member delivers the assets to the designated SoHE staff member who is responsible for management of digital assets (Meghan Mullaney).
- 3) Following the taxonomy (page 5), create a new folder on the server to hold the assets, if a suitable folder does not already exist. The “general file name guidelines” on page 6 apply to folder names as well. Be sure to be consistent when you need to create new folders.  
**Example:** For photos of student recipients of the UEPS scholarship in 2013, you would go to the ‘Events’ folder and create the following folders--
  - ↳ 2013 [create this folder if needed]
  - ↳ 2013 SoHE UEPS Recipients [create this folder]
  - ↳ (Place assets here)
- 4) Add the assets to the correct folder. The assets will be uploaded via AutoSync.
- 5) Change the filename(s) to follow the naming convention outlined on page 6. For multiple assets, use the ‘Batch Rename’ feature on the Desktop Client. Be sure you know the last sequential number that has been used for the year. Enter the name so that it begins with the next number, and Portfolio will number the rest of the assets incrementally. (**Example:** If the last uploaded asset’s filename is “2013\_000135,” enter “2013\_000136”)
- 6) Catalog the assets by adding metadata. **Remember:** Without strong metadata, the DAMS will only be of limited use. The following fields are mandatory, but more is better!
  - dc.Identifier:FileName
  - dc.Title
  - dc.Creator
  - dc.Format:Container
  - dc.Source:Location
  - dc.Subject:Keywords

**Note:** If a new folder needs to be added to the taxonomy (at the highest level), contact Rachel Appel. She will have to set up a new autosync folder.

## Batch Cataloging Workflow<sup>3</sup>

The following workflow is designed for efficient cataloging, using batch processing where possible. It approaches assets from three levels: **the folder level** (all assets in a particular folder), **the group level** (assets of similar subject matter), and **the item level** (individual assets).

The workflow organizes Dublin Core fields by the level at which they can be edited. For example, the *dc:Source\_Location* field for all items can be edited in bulk to say "SoHE, heco-storage" because all items will be located on this server. Conversely, on the item level, all individual items have a unique *dc:Identifier\_FileName*.

This workflow increases efficiency by avoiding the need to edit every field for every asset individually. Being able to edit in bulk increases productivity.

- 1) Select the folder you want to edit. Select all images.
- 2) Fill in the metadata for all folder-level fields. Click 'Submit' in the lower right corner.
- 3) Going through the group-level fields, select only the items that can be given the same title, location, date, keywords, etc. Fill in the appropriate fields and click 'Submit.'
- 4) Finally, move on to item-level cataloging to fill in the remaining fields.

**HINT:** To select a group of images: click on the first image in the group, hold the shift key, and click on the last image in the group. This will select all items in between.

### Folder Level

- 07\_dc\_Creator
  - ↳ Typically the same, must be double-checked
- 09\_dc\_Source\_Project
  - ↳ This field should be populated with the folder name.
- 10\_dc\_Rights
- 11\_dc\_Source\_Location
  - ↳ All photos can be filled with " SoHE, heco-storage"
- 15\_dc\_Type
  - ↳ Image, MovingImage, or Sound

### Group Level

- 03\_dc\_Title
  - ↳ Often editable in groups, sometimes needs editing at the item level
  - ↳ Example: "Exterior of Gearing Hall"
- 05\_dc\_Coverage\_Location
  - ↳ The University of Texas, Austin, etc.

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<sup>3</sup> This workflow was modified from UMCS DAMS intern Kevin Powell's workflow, developed in 2012.

- 06\_dc\_Coverage\_Date
  - ↳ Pictures with the same subjects are more than likely taken on the same day, advisable to double check.
- 12\_dc\_Subject\_Keywords
  - ↳ Can vary based on picture, but typically the same in large groups
- 13\_dc\_Format\_Container
  - ↳ JPEG, Tiff, NEF, etc.
- 14\_dc\_Format\_Alignment
  - ↳ Varies, but easily editable in large groups.
- 16\_dc\_DigSpecsModelName
  - ↳ *Typically* the same, must double-check
  - [Click this link for a tutorial on how to access that information](https://wikis.utexas.edu/display/UMCSDAMS/How+to+Find+Digital+Specs)  
(<https://wikis.utexas.edu/display/UMCSDAMS/How+to+Find+Digital+Specs>)

### Item Level

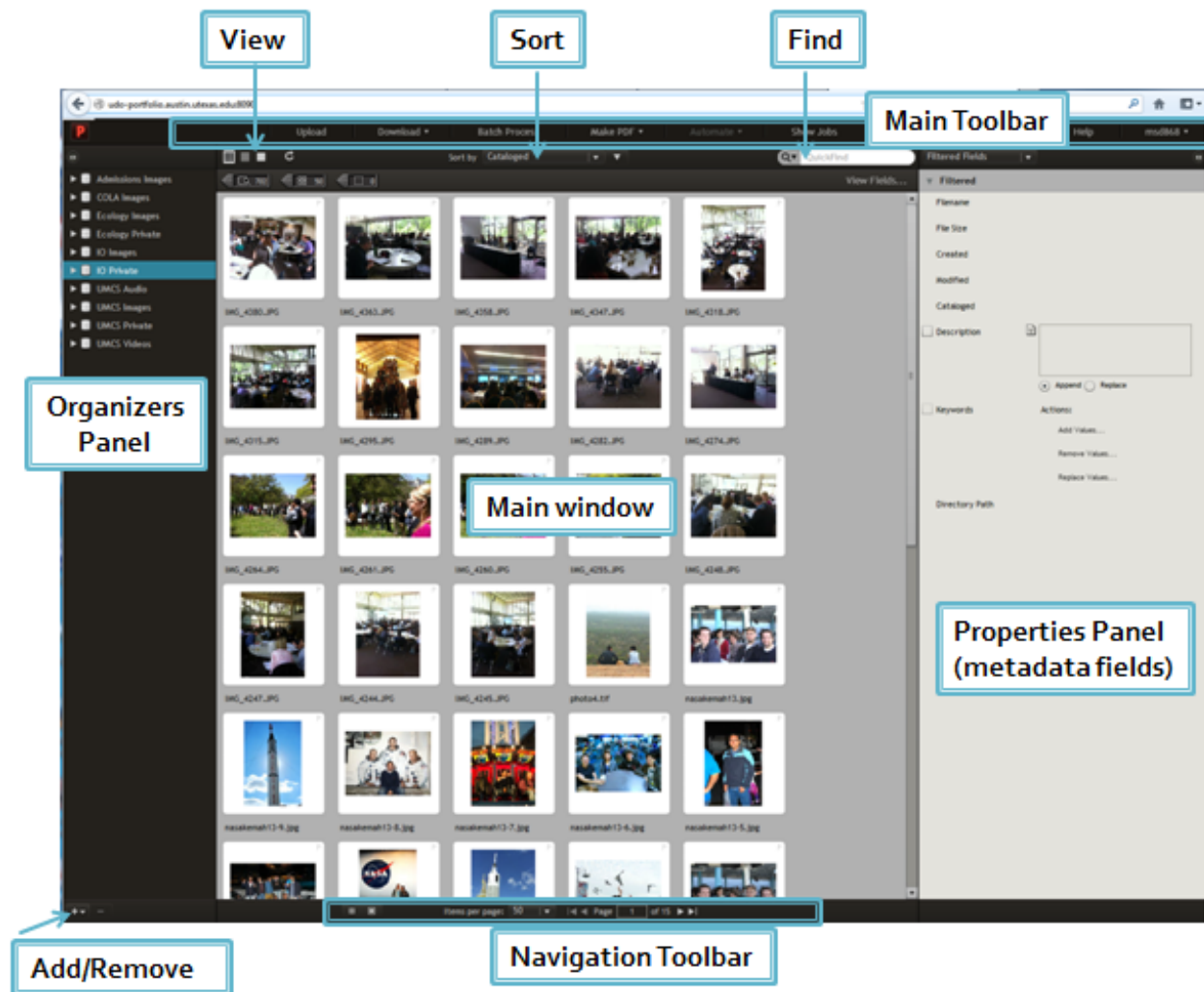
- 01\_dc\_Identifier\_FileName
  - An asset's standardized file name
    - "Year\_ItemNumber.extension"
- 02\_dc\_Identifier\_Legacy
  - An asset's original name
    - e.g. "Tower reflection.jpg"
- 04\_dc\_Description
  - Sometimes photos can be described in groups

Custom	
01_dc_Identifier_File Name	photo4.tif
02_dc_Identifier_Legacy	photo4.tif
03_dc_Title	Students at Enchanted Rock for Texas
04_dc_Description	Two students, seen from the back, sit
05_dc_Coverage_Location	Fredericksburg, TX
06_dc_Coverage_Date	2013-03-23 11:20:55
07_dc_Creator	The International Office, The Universi
08_dc_Contributor	
09_dc_Source_Project	Enchanted Rock Texas Excursion 2
10_dc_Rights	The University of Texas at Austin
11_dc_Source_Location	IO, Austin Disk
12_dc_Subject_Keywords	Enchanted Rock Field Trips Hiking Off-Campus Events
+ -	

Figure 4: Example of a completed catalog record

## Portfolio Server: Web Client User Guide<sup>4</sup>

### User Interface



<sup>4</sup>This User Guide is adapted from the Portfolio Server 10 Web Client Guide. Available at: <http://www.extensis.com/downloads/user-guides/portfolio-server-10-web-client-user-guide/>

## Upload new images

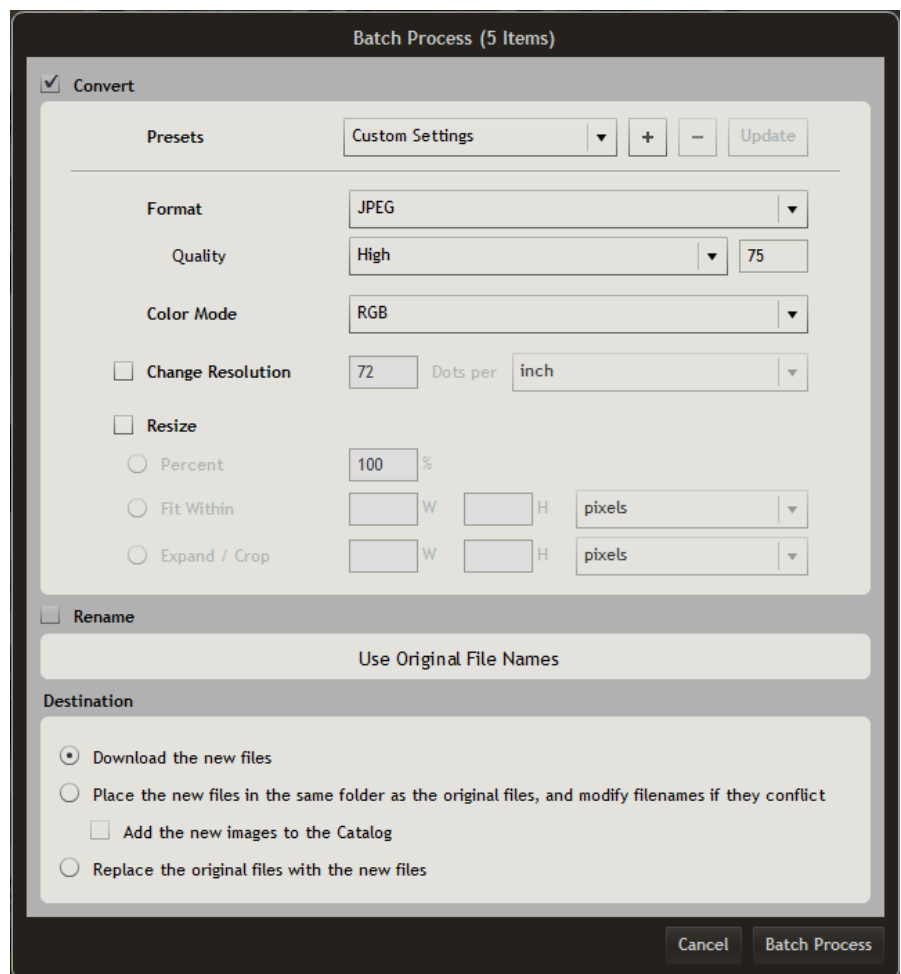
1. Create a new folder within the existing taxonomy on your server
2. Add images to the new folder--they will auto sync to Portfolio!
3. Log into the web client (<http://udo-portfolio.austin.utexas.edu:8090/>)
4. Use the “batch process” function to rename files following the naming conventions (2013\_#####)
5. Catalog the new images

**Note:** If you want to add more top-level directories in the future, contact the Digital Asset Manager. She will have to set the directory up so that it syncs to Portfolio.

## Batch Processing

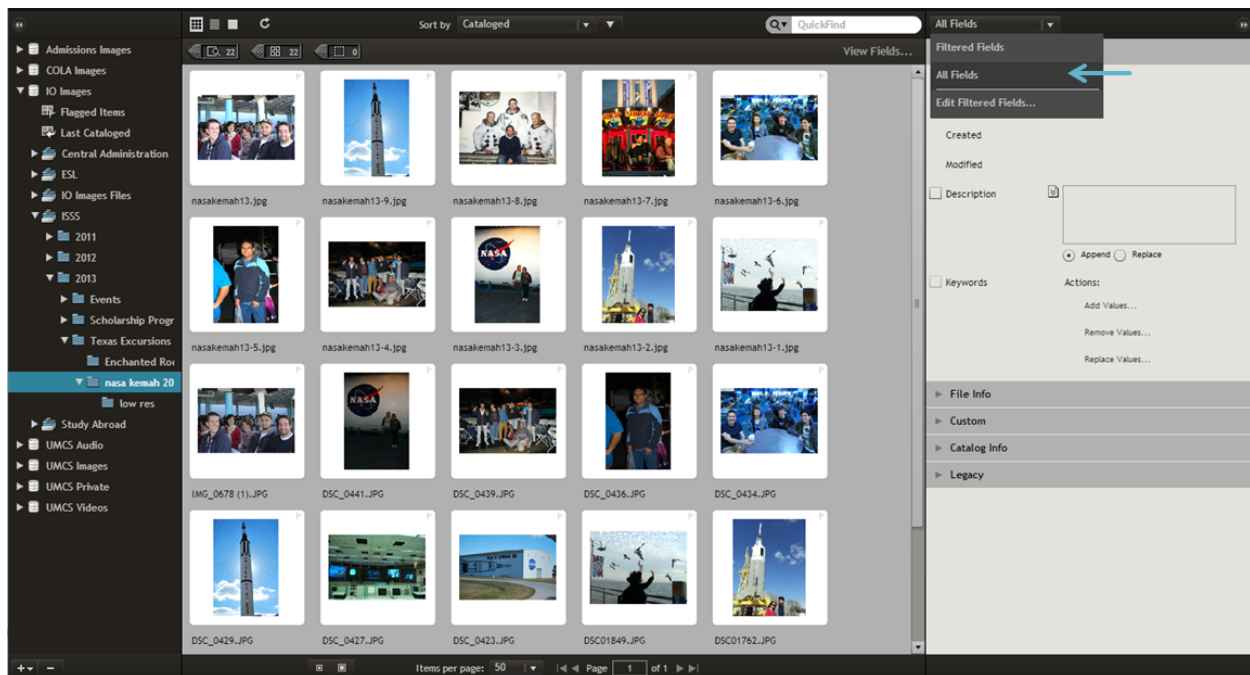
Transform multiple files, then either download the results or add them to the catalog, optionally replacing the originals.

1. Select the gallery, folder or items
2. Click “Batch Process” in the main toolbar
3. Convert
  - Format
  - Quality
  - Color mode
  - Resolution (pixels)
  - Resize
4. Rename:
  - Input the year as text (ex: 2013\_)
  - Input the item # (ex: 000367) under ‘number-from’, based on the last item # used
5. Choose destination
  - If you are just renaming, choose ‘Replace the original files’
  - If converting, you will want to keep the original files



## Cataloging Basics

1. Click the arrow next to your Catalog in order to expand it.
2. Select the folder of images that you would like to catalog.
3. In the upper right, expand the box that says "Filtered Fields" and select "All Fields." From here, scroll down and expand the Custom fields, where you will find the Dublin Core (dc) metadata fields.
4. Begin with Folder level cataloging, following the batch cataloging workflow (see pages 17-18). Select all items in a folder, and fill in the fields that apply to all of them. Click 'Submit' in the lower right.

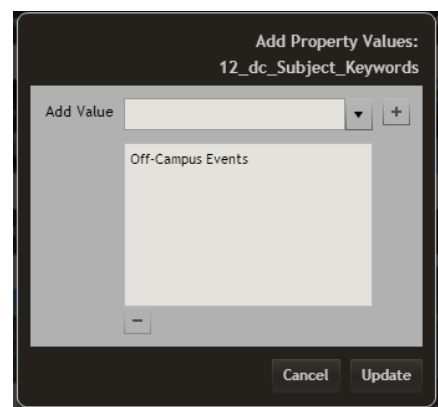


## Adding Keywords:

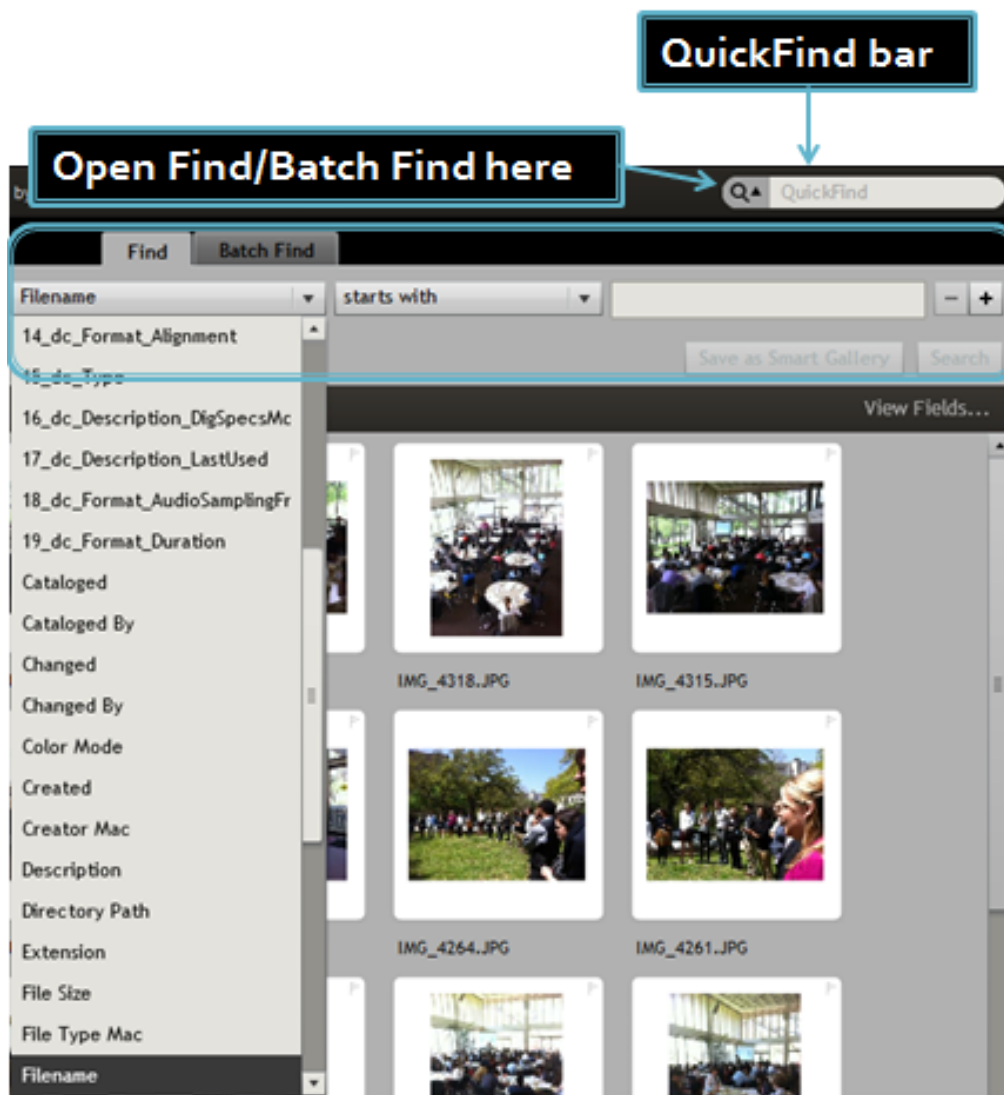
1. To add keywords, select "Add Values" under custom field # 12 (12\_dc\_Subject\_Keywords).
2. Select a keyword from the dropdown list. Click the add button (+). Add more keywords if more apply. Then click "update."
3. In addition to the general keywords listed in the dropdown list, **be sure to add your own!** Just type the keyword in the "Add Value" box, and click add.

Use the Controlled Vocabularies at the end of this guide for names of campus buildings, schools, and departments.

Create your own controlled vocabulary to create consistent keywords that are most useful for your department.



## Searching



All custom metadata is searchable through QuickFind

1. Select the catalog you want to search within
2. Type keywords in the QuickFind bar
3. Hit Enter

For more complex searches, use Find or Batch Find

1. Click the triangle on the QuickFind bar to expand the options
2. These searches can also be saved as Smart Galleries

## Galleries

A gallery is a good way to organize and view only certain items in your catalog. For example, a photographer may create a catalog of his entire body of work, but have one gallery that displays only portrait photos, and another that displays only landscapes. Galleries can display any subset of the items in your catalog.

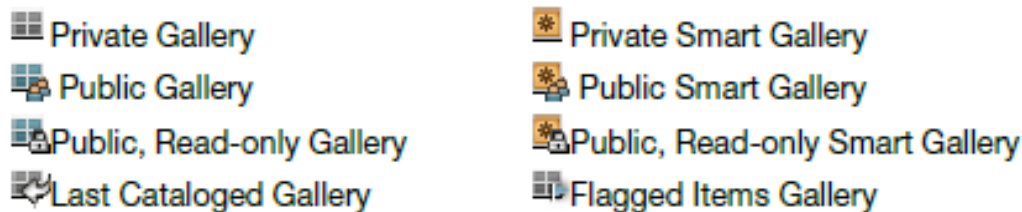
### Settings

When you create a gallery, you have the option to make it private, public, or read-only.

- Galleries are private by default
- Smart Galleries: Automatically search for files that meet your metadata terms. When new images are cataloged that meet your search parameters, the gallery will automatically add them.


These two default galleries will always be in your catalog:

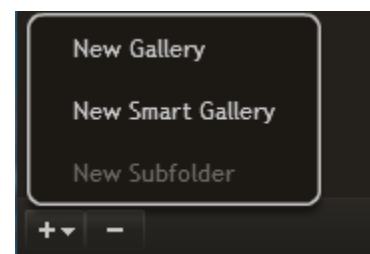
- Flagged Items: Flags are temporary! They will reset each time you log out or close the browser
- Last Cataloged: Shows assets that were cataloged in the last 24 hours



### Creating Galleries

Add galleries


1. Select the Ecology (SoHE) catalog
2. Click the Add button , lower left
3. Choose 'New Gallery' from the menu
4. Name the gallery, choose if you want it public, save



Edit galleries

1. Double-click on the name to change the name or edit privacy settings

Delete galleries

1. Select the gallery, click the Delete button in the lower left 
2. Click 'OK'



## Adding items to galleries


When you add items to galleries, the files themselves remain in the same place in the catalog. The galleries allow you to create virtual collections without ever moving the original images, so you can use the galleries to collaborate or to help you choose images to use for a project.

- **Drag and drop**

You can use a simple drag and drop technique by selecting the thumbnails of images you want to add to your gallery, and dragging them over the gallery icon

- **Proxies:** You can also drag an item Proxy to the gallery (See [Figure 5](#) below)

- Found Items (all items, on all pages in your search or open catalog)
- Displayed Items (all items on the current page)
- Selected Items (only highlighted items)

- **Delete:** Remove items from a gallery by selecting them and clicking delete in the lower left corner 

(Note: This does not delete them from the catalog)

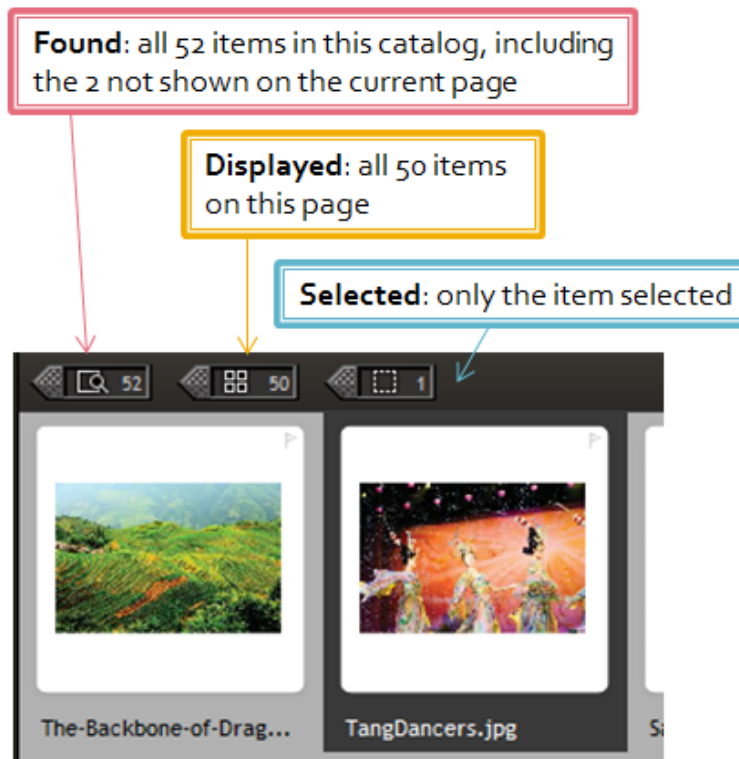


Figure 5: Proxies

## Keywords: Controlled Vocabularies

The Dublin Core website describes controlled vocabularies as “*a limited set of consistently used and carefully defined terms.*” Using controlled vocabularies “can dramatically improve search results because computers are good at matching words character by character but weak at understanding the way people refer to one concept using different words, i.e. synonyms. Without basic terminology control, inconsistent or incorrect metadata can profoundly degrade the quality of search results. For example, without a controlled vocabulary, "candy" and "sweet" might be used to refer to the same concept.”<sup>5</sup> Consistency is key!

General keywords are provided in a drop down list on Portfolio. The Colleges, Schools, Departments, and Sub Departments, Campus Buildings, and Libraries are listed here for reference.

While the Subject:Keyword field is uncontrolled, consistency in naming still remains important. For example, persons named are always Last Name, First Name. Please select as many keywords that fit the asset. You may want to develop your own additional controlled vocabulary of commonly used keywords.

### General

Administration	Classroom	Longhorn
Advisory Council	Commencement	Off-Campus Events
Alumni	Community Service	Portraits
Architectural Details	Donors	Quick Selection for Media
Arts	Faculty	Scenic
Athletics	Friends	Science
Austin	Graduate	Student
Black and White	Historical	Technology
Buildings	Hook em'	Undergraduate
Campus Events	International	

<sup>5</sup> Section 3, Element Content and Controlled Vocabularies. <http://dublincore.org/documents/usageguide/>

## Colleges, Schools, Departments, Sub Departments

Architecture, School of	LBJ School of Public Affairs
Athletics, Intercollegiate for Men and Women	Liberal Arts, College of
Blanton Museum of Art	Libraries, UT
Briscoe Center for American History	Marine Science Institute
Business, McCombs School of	McDonald Observatory
Butler School of Music	Natural Sciences, College of
Center for Teaching and Learning	Nursing, School of
Communication, College of	Pharmacy, College of
Continuing and Innovative Education	President, Office of the
Diversity and Community Engagement, Division of	Research, Office of Vice President
Education, College of	Retired Faculty-Staff Association
Engineering, Cockrell School of	Social Work, School of
Fine Arts, College of	Student Affairs, Office of Vice President
Geosciences, Jackson School of	Texas Advanced Computing Center
Graduate School	Texas Exes
Harry Ransom Humanities Research Center	Texas Natural Science Center
IC2 Institute	Texas Parents
ICES - Institute for Computational Engineering & Sciences	Texas Performing Arts
Information, School of	The University of Texas System
International Office	Undergraduate Studies, School of
KUT	University Operations
Lady Bird Johnson Wildflower Center	UT Child Development Center
Law, School of	UT Elementary School
	UT Police Department (UTPD)
	UT Press

## Campus Buildings

Academic Annex	Battle Hall	Chilling Station No. 3
Applied Computational Engineering and Sciences Building	Burdine Hall 2616 Wichita	Chilling Station No. 4 Chilling Station No. 5
Almetris Duren Hall	Calhoun Hall	Center for Transportation Research
Athletic Fields Pavilion	McCombs School of Business	Development Office Building
Anna Hiss Gymnasium	Conference Center Garage	Denton A. Cooley Pavilion
Arno Nowotny Building	John B. Connally Center for Justice	E. William Doty Fine Arts Building
Andrews Dormitory	Comal Child Development Center Annex	UFCU Disch-Falk Field
Animal Resources Center	Collections Deposit Library	Edgar A. Smith Building
Art Building and Museum	Continuing Engineering Education (formerly NSA)	Ernest Cockrell Jr. Hall
AT&T Executive Education and Conference Center	Jesse H. Jones Communication Center - Building A	Engineering-Science Building
Batts Hall	Jesse H. Jones Communication Center - Building B	E. P. Schoch Building
L. Theo Bellmont Hall	Child Development Center	Frank C. Erwin Jr. Special Events Center
Benedict Hall	Computation Center	Engineering Teaching Center II
Brackenridge Hall Dormitory	Chemical and Petroleum Engineering Building	Peter T. Flawn Academic Center
Biological Laboratories	Computational Resource Building	Facilities Complex Building 1
Blanton Dormitory	Carothers Dormitory	Facilities Complex Building 2
Blanton Museum of Art	Creekside Residence Hall	Facilities Complex Building 3
Biomedical Engineering Building	Computer Science Annex	Facilities Complex Building 4
Biological Greenhouse		Facilities Complex Building 5
Bernard and Audre Rapoport Building		Facilities Complex Building 6
Brazos Garage (formerly PG3)		

Facilities Complex Building 7	Lyndon B. Johnson Library	Norman Hackerman Building
Facilities Complex Building 8	Littlefield Carriage House	Neural Molecular Science Building
Frank Denius Fields	Littlefield Home	North Office Building A
J. Frank Dobie House	LLA Living Learning Center	Nursing School
Larry R. Faulkner Nano Science and Technology Building	LLB Living Learning Center	Performing Arts Center
OFPC Field Staff Office	LLC Living Learning Center	T. S. Painter Hall
Garrison Hall	LLD Living Learning Center	Parlin Hall
Mary E. Gearing Hall	LLE Living Learning Center	J. T. Patterson Laboratories Building
Dorothy L. Gebauer Building	LLF Living Learning Center	Perry-Castaneda Library
Goldsmith Hall	Littlefield Dormitory	Prather Hall Dormitory
Gregory Gymnasium	Laboratory Theater Building	Pharmacy Building
Geography Building	Manor Garage (formerly PG5)	Hal C. Weaver Power Plant Annex
Graduate School of Business Building	Main Building	Printing and Press Building
UT Administration Parking Garage	Louise and James Robert Moffett Molecular Biology Building	Hal C. Weaver Power Plant Expansion
Hogg Memorial Auditorium	Mezes Hall	Hal C. Weaver Power Plant
Harry Ransom Center	Richard Mithoff Track and Soccer Fieldhouse	Roberts Hall Dormitory
Homer Rainey Hall	Moore-Hill Dormitory	Robert Lee Moore Hall
William Randolph Hearst Building (formerly CMC)	Mike A. Myers Track and Soccer Stadium	Recreational Sports Center
Beauford H. Jester Center	Moncrief-Neuhaus Athletics Center	Student Activity Center
Jackson Geological Sciences Building (formerly GEO)	Music Building East and Music Building/Recital Hall	San Antonio Garage (formerly PG2)
John W. Hargis Hall	Mail Services Building	Red and Charline McCombs Field
Jesse H. Jones Hall	North End Zone	Sarah M. and Charles E. Seay Building
Kinsolving Dormitory		

Service Building	Joe C. Thompson Conference Center	University Police Building
San Jacinto Garage (formerly PG1)	Texas Memorial Museum	UT Administration Building
San Jacinto Residence Hall	Townes Hall	University Teaching Center
Sid Richardson Hall	Trinity Garage (formerly PG7)	Etter-Harbin Alumni Center
Student Services Building	Lee and Joe Jamail Texas Swimming Center	Waggener Hall
School of Social Work Building	27th Street Garage (formerly PG4)	Will C. Hogg Building
Darrell K Royal-Texas Memorial Stadium	Penick-Allison Tennis Center	Robert A. Welch Hall
Sutton Hall	2609 University Avenue	F. Loren Winship Drama Building
Speedway Garage (formerly PG6)	University Interscholastic League	West Mall Office Building
2617 Speedway	Union Building	Wooldridge Hall
George I. Sanchez Building		W. R. Woolrich Laboratories
		Walter Webb Hall

## Libraries

Alexander Architectural Archive	Mallet Chemistry Library
Architecture and Planning Library	Marine Science Library
Benson Latin American Collection	McKinney Engineering Library
Classics Library	Perry-Castañeda Library
Fine Arts Library	Tarlton Law Library
Kuehne Physics Mathematics Astronomy Library	Walter Geology Library
Life Science Library	