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I. Introduction

OpenMIC is an open source, web-based bibliographic utility that can be used as a standalone application or integrated with other repository architectures by a wide range of organizations. It provides a complete metadata creation system for analog and digital materials, with services to export these metadata in standard formats.

The bibliographic utility features a METS data architecture which can be used in any METS-based or METS-compliant environment. It uses MODS as an underlying metadata schema for descriptive MD, NISO/AES standard for technical MD and PREMIS for source MD and rights MD. It outputs an XML wrapper for the METS components as a single object.

The bibliographic utility data model is primarily an event-based data model, intended to document what happens to a resource at a specific time and place. Preservation and condition events, provenance events, rights events, and descriptive events document what happens to a resource throughout its lifecycle. Details of the events can include associated entities (such as an exhibit curator) and associated objects (such as an exhibit catalog).

OpenMIC is a core application for the Moving Image Collections (MIC) initiative developed at the Rutgers University Libraries with funding from the Library of Congress.

II. Using this Manual

This manual assumes that the software has already been installed and configured. For installing the software, please see the OpenMIC installation and configuration manual.

This manual describes how to use OpenMIC to create and maintain metadata for analog and digital objects such as photographs, moving images etc.

There are five sections in this manual.

Section 1 provides a typical workflow diagram for digital objects in OpenMIC.

Section 2 provides a diagram showing the hierarchy of objects in OpenMIC.

Section 3 explains the different types of objects in OpenMIC.

Section 4 provides detailed step-by-step instructions to create or maintain digital objects.

Section 5 provides detailed step-by-step instructions to perform other administrative tasks.
Section 1: Workflow in OpenMIC

Step 1. Administration
- Create Organization
- Create Collection(s)
- Create User(s)

Step 2. Metadata and Digital Objects
- Create Metadata
- Manual Input
- Batch import

Step 3. Export (Optional)
- Export in METS/XML
- Export in Marc XML
Section 2: Object Hierarchy in OpenMIC

- **Organization**: Ex: RUL
  - **Collection 1**: Ex: RUL General Collection
    - **Sub Collection 1**: Ex: Video Tape Collection
    - **Resource 1**: Ex: Gone with the Wind
  - **Collection 2**: Ex: RUL Special Collections
    - **Sub Collection 2**: Ex: John Doe Collection
    - **Resource 2**: Ex: Lecture Series

Section 3: Object Types in OpenMIC

1. **Collection Object**

   A collection object is a special object that contains the information about the organization that holds the collection and the description of the collection.

2. **Resource Object**

   A resource object is an item that contains information about the resource that is being digitized.
Section 4: Using OpenMIC

OpenMIC is used to create and maintain metadata for analog and digital materials. The software can be used as a standalone system or can be integrated with other repositories. There are three basic steps to create metadata.

Step 1: Administration

Before you start creating metadata, you must create an organization record and at least one collection record. Please note that there should be only one organization record for each organization. You may create as many collections you need for each organization.

1.1) Organization Management

Create Organization:

i. Login as Super User.
ii. Select Digital Workflow Management System from the main screen.
iii. Select Administration.
iv. Select Organization Management.
v. Select Create New Organization.
vi. Enter Marc Org ID, Organization Name, address, and contact information.
vii. Click Save.

Note 1: Recommended Browsers – Firefox 1.0; Netscape 7.1 and above; IE5.0 and above

Note 2: Disable pop-up blocking

Note 3: Enable Cookies
Figure 1.1.1: Main Screen

- **Administration**
  Manage organizations, collections, and transactions, perform database cleanup, create announcements.

- **Configuration**
  Configure metadata cataloging, digital file handling, mapping, batch import, and export utilities according to organization policies.

- **Reports**
  View or print statistical reports about your metadata or digital files.

- **Metadata and digital objects**
  Create or edit cataloging records, create or upload digital objects, map schemas, import, export, etc.

Figure 1.1.2: MIC Catalog Main screen
Administration

Figure 1.1.3: Administration Screen

Organization List

<table>
<thead>
<tr>
<th>Exit</th>
<th>Application Review</th>
<th>Delete</th>
<th>Edit</th>
<th>Create New Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Organization</td>
<td></td>
<td></td>
<td>Status</td>
</tr>
<tr>
<td></td>
<td>Oregon Health &amp; Science University Library</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pacific Film Archive</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Walter J. Brown Media Archives &amp; Peabody Awards Collections</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Smithsonian Institution Archives</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>National Library of Medicine</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Library of Congress Motion Picture, Broadcasting, and Recorded Sound Division</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Fortunoff Video Archive for Holocaust Testimonies</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Northeast Historic Film</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Research Channel</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 1.1.4: Organization List Screen
Setup Organization

The Workflow Management System (WMS) is a flexible digital object management tool that helps you prepare the digital objects and associated metadata for ingest into Fedora based RUcore repository.

<table>
<thead>
<tr>
<th>Organization ID:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Name:</td>
<td></td>
</tr>
<tr>
<td>Organization Address:</td>
<td></td>
</tr>
<tr>
<td>Contact Person:</td>
<td></td>
</tr>
<tr>
<td>Name:</td>
<td></td>
</tr>
<tr>
<td>Telephone:</td>
<td></td>
</tr>
<tr>
<td>Email:</td>
<td></td>
</tr>
</tbody>
</table>

Figure 1.1.5: Create Organization Screen

**Edit Organization:**

i. Login as Super User.
ii. Select *Digital Workflow Management System* from the main screen.
iii. Select *Administration*.
iv. Select *Organization Management*.
v. Select *Organization*.
vi. Click *Edit*.
vii. Edit metadata and click *Save*.
### Figure 1.1.6: Organization List Screen

<table>
<thead>
<tr>
<th>Organization</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oregon Health &amp; Science University Library</td>
<td></td>
</tr>
<tr>
<td>Pacific Film Archive</td>
<td></td>
</tr>
<tr>
<td>Walter J. Brown Media Archives &amp; Peabody Awards Collections</td>
<td></td>
</tr>
<tr>
<td>Smithsonian Institution Archives</td>
<td></td>
</tr>
<tr>
<td>National Library of Medicine</td>
<td></td>
</tr>
<tr>
<td>Library of Congress Motion Picture, Broadcasting, and Recorded Sound Division</td>
<td></td>
</tr>
<tr>
<td>Fortunoff Video Archive for Holocaust Testimonies</td>
<td></td>
</tr>
<tr>
<td>Northeast Historic Film</td>
<td></td>
</tr>
<tr>
<td>Research Channel</td>
<td></td>
</tr>
</tbody>
</table>

### Setup Organization

The Workflow Management System (WMS) is a flexible digital object management tool that helps you prepare the digital objects and associated metadata for ingest into Fedora-based PUCore repository.

### Figure 1.1.7: Edit Organization Screen

<table>
<thead>
<tr>
<th>Organization ID:</th>
<th>ORPHB</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Name:</td>
<td>Oregon Health &amp; Science University Library</td>
</tr>
<tr>
<td>Contact Person:</td>
<td></td>
</tr>
<tr>
<td>Name:</td>
<td></td>
</tr>
<tr>
<td>Telephone:</td>
<td></td>
</tr>
<tr>
<td>Email:</td>
<td></td>
</tr>
</tbody>
</table>

[EXIT] [SAVE]
Delete Organization:

*Note: Deleting Organization will delete all the collections and resources belong to this organization.*

i. Login as Super User.
ii. Select Digital Workflow Management System from the main screen.
iii. Select Administration.
iv. Select Organization Management.
v. Select Organization.
vi. Click Delete.

Application Review:

This feature is not fully implemented in this version.

![Organization List Screen](image1.png)

**Figure 1.1.8: Organization List Screen**
1.2) Collection Management

You may create as many collection objects you need for each organization. A collection object is a special object that contains the information about the organization that holds the collection and the description of the collection. It keeps all the resources that belong to a collection together for search and display.

Create Collection

i. Select Digital Workflow Management System from the main screen.
ii. Select Administration.
iii. Select Collection Management.
iv. Select Organization.
v. Click Show Collection List.
vi. Click Create New Collection.
vii. Enter metadata for the collection.
viii. Click Save.

Figure 1.2.1: Main Screen
- **Administration**
  - Manage organizations, collections, and transactions, perform database cleanup, create announcements.

- **Configuration**
  - Configure metadata cataloging, digital file handling, mapping, batch import, and export utilities according to organization policies.

- **Reports**
  - View or print statistical reports about your metadata or digital files.

- **Metadata and digital objects**
  - Create or edit cataloging records, create or upload digital objects, map schemas, import, export, etc.

---

Figure 1.2.2: MIC Catalog Main Screen

---

**Administration**

- Organization Management
- Collection Management
- Database Cleanup
- Transaction Management
- Announcements

EXIT

---

Figure 1.2.3: Administration Screen
### Organization List

<table>
<thead>
<tr>
<th>Organization</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>paul's organization</td>
<td></td>
</tr>
<tr>
<td>Rutgers Libraries (EAL)</td>
<td></td>
</tr>
<tr>
<td>rutgers wms</td>
<td></td>
</tr>
<tr>
<td>Tracey Mayer Fiber Arts Repository</td>
<td></td>
</tr>
<tr>
<td>Rutgers University</td>
<td></td>
</tr>
<tr>
<td>KYUK-TV</td>
<td></td>
</tr>
<tr>
<td>DeNicola's Crocheting</td>
<td></td>
</tr>
<tr>
<td>Springsteen University</td>
<td></td>
</tr>
<tr>
<td>Northeast Historic Film</td>
<td></td>
</tr>
<tr>
<td>Library of Congress</td>
<td></td>
</tr>
<tr>
<td>Marty's Org</td>
<td></td>
</tr>
<tr>
<td>NancyO808</td>
<td></td>
</tr>
<tr>
<td>Tracey Meyer Knitting Pattern Repository August 2008</td>
<td></td>
</tr>
<tr>
<td>yfs Org 87</td>
<td></td>
</tr>
<tr>
<td>El Street University 080708</td>
<td></td>
</tr>
<tr>
<td>Paul esbrell repository 07/09</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 1.2.4: Organization List Screen**

### Collection List

```
{Organization: 'Rutgers Libraries (EAL)'}
```

<table>
<thead>
<tr>
<th>Collection</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>New EAL collection</td>
<td>OK</td>
</tr>
<tr>
<td>Y.Y. Test Collection</td>
<td>OK</td>
</tr>
<tr>
<td>new batch load testing 1</td>
<td>OK</td>
</tr>
<tr>
<td>Rhonda's Test Collection 20080520</td>
<td>OK</td>
</tr>
</tbody>
</table>

**Figure 1.2.5: Collection List Screen**
Figure 1.2.4: Metadata Entry Screen

**Edit Collection**

i. Select *Digital Workflow Management System* from the main screen.
ii. Select *Administration*.
iii. Select *Collection Management*.
iv. Select *Organization*.
v. Click *Show Collection List*.
vi. Select *Collection*.
vii. Click *Edit*.
viii. Edit metadata and click *Save*. 
Figure 1.2.6: Administration Screen

Figure 1.2.7: Organization List Screen
Delete Collection

Note: Deleting collection will delete all the resources belong to the collection.

i. Select Digital Workflow Management System from the main screen.
ii. Select Administration.
iii. Select Collection Management.
iv. Select Organization.
v. Click Show Collection List.
vi. Select Collection.
vii. Click Delete.
Figure 1.2.9: Administration Screen

Figure 1.2.10: Organization List Screen
**Collection List**

Figure 1.2.11: Collection List Screen

**View Collection**

There are three options available to view a collection record: METS, FOXML (Fedora Object XML for Fedora repositories), and TEXT.

1. Select the collection you want to view from the collection list.
2. Click **METS, FOXML, or TEXT**.
<?xml version="1.0" encoding="utf-8"?>

  <METS:metsHdr ID="M1" CREATEDATE="2006-10-06T14:59:42" LASTMODDATE="2006-10-06T14:59:42">
    <METS:dmdSec ID="DM1-1" GROUPID="" ADMID="ADM1-1" CREATED="2006-09-19T11:22:09" STATUS="">
      <METS:mdWrap MDTYPE="text/xml" MDTYPE="OTHER" LABEL="MODS Metadata">
        <METS:xmlData>
          <mods:mods>
            <mods:typeOfResource>Collection</mods:typeOfResource>
            <mods:titleInfo ID="T-1" type="">
              <mods:title>ka test organization</mods:title>
            </mods:titleInfo>
            <mods:identifier type="collection">rcore000000000829</mods:identifier>
            <mods:name ID="NAME-1" type="personal">
              <mods:namePart type="family">KA</mods:namePart>
              <mods:namePart type="given">AK</mods:namePart>
            </mods:name>
            <mods:role>
              <mods:roleTerm type="text" authority=" marcRelator">owner</mods:roleTerm>
            </mods:role>
            <!-- Other elements... -->
          </mods:mods>
        </METS:xmlData>
      </METS:mdWrap>
    </METS:dmdSec>
  </METS:metsHdr>
</METS:mets>

Figure 1.2.12: Collection Record in METS
Figure 1.2.13: Collection Record in FOXML for Fedora Repositories
Metadata Entries

Descriptive:

Type OfResource: Collection

Title Info:
Main Title: ka test organization

Identifier:
Type: collection
Identifier: rncre000000629

Personal Name:
Family Name: KA
Given Name: AK
Name Role:
Role Type: text
Role Authority: marcRelator
Name Role: owner

Corp/Org Name:
Corp/Org Name: NjNcRU
Display Form: Rutgers University

Figure 1.2.14: Collection Record in TEXT
1.3) User Management

It is strongly recommended to create individual user accounts to be able to keep track of the work performed by the users. The user information such as user name and email is written in the xml. Each user account is associated with role(s).

Create User

i. Select Manage User Account from the main screen
ii. Enter First Name, Last Name, Address (optional), Email, UserID, password.
iii. Reenter password.
iv. Click Submit.
v. Next you need to assign role to this user. If there are no role(s) created for your organization, create role(s) before you proceed.
vi. Select the user.
vii. Click Assign roles.
viii. Select the appropriate role for this user.
ix. Click Submit.

Create Role

i. Select Organization from the pull down list.
ii. Select WMS Utility from the pull down list for module.
iii. Click edit roles.
iv. Enter role name and role description in the data entry box on Role-Privilege Relationship screen.
v. Select privilege(s) associated with this role. See Table 1. for associated permissions for each role.
vi. Click Submit.
<table>
<thead>
<tr>
<th>Privileges</th>
<th>Permissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Super User</td>
<td>Create user; Edit user; Delete user; Create roles; Edit roles; Delete roles</td>
</tr>
<tr>
<td></td>
<td>Create organization; Edit organization; Delete organization; Setup required elements; Create collection level template; Edit collection level template; Delete collection level template; View collection level template</td>
</tr>
<tr>
<td>Manage User</td>
<td>Edit username; Edit password</td>
</tr>
<tr>
<td>Manage Collections</td>
<td>Edit username; Edit organization</td>
</tr>
<tr>
<td></td>
<td>Create collection; Edit collection; Delete collection; View collection</td>
</tr>
<tr>
<td>Configure Cataloging Utility</td>
<td>Edit username; Edit password</td>
</tr>
<tr>
<td></td>
<td>Setup required elements; Create collection level template; Edit collection level template; Delete collection level template; View collection level template</td>
</tr>
<tr>
<td>Mapping</td>
<td>Edit username; Edit password</td>
</tr>
<tr>
<td></td>
<td>Create or revise metadata mapping; Upload sample records; Check map</td>
</tr>
<tr>
<td>Batch Import</td>
<td>Edit username; Edit password</td>
</tr>
<tr>
<td></td>
<td>Batch import of metadata records</td>
</tr>
<tr>
<td>Export</td>
<td>Edit username; Edit password</td>
</tr>
<tr>
<td></td>
<td>Batch export of metadata records</td>
</tr>
<tr>
<td>Metadata Cataloging</td>
<td>Edit username; Edit password</td>
</tr>
<tr>
<td></td>
<td>Create personal template; Edit personal template; Delete personal template; Create metadata record; Edit metadata records; Delete metadata record; View metadata record</td>
</tr>
<tr>
<td>View/Generate Reports</td>
<td>Not implemented; Not implemented</td>
</tr>
<tr>
<td>Read Only</td>
<td>Not implemented; Not implemented</td>
</tr>
</tbody>
</table>

Table 1: User Privileges and Permissions
Figure 1.3.1: Main Screen

User Account

First Name: 
Last Name: 
Address: 
Email: 
MIC UserID: 
Password: 
Re-type Password: 

Cancel | Submit
Figure 1.3.2: Create User Account Screen

Registered Users

<table>
<thead>
<tr>
<th>Name</th>
<th>Role Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Otto Jane</td>
<td>Super user</td>
</tr>
<tr>
<td>Savage Sean</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>Yu Yang</td>
<td>Super user</td>
</tr>
<tr>
<td>Yu Yang - 2</td>
<td>[Ak3eKYUK] Cataloger/import/export/map</td>
</tr>
</tbody>
</table>

Delete User  Assign Role(s)

Figure 1.3.3: Registered Users Screen

Role Assignment  (for User 1)

SUPER USER?  Yes  No
Role for this organization:
Role for this module:
Role:

Current Role Assignment

<table>
<thead>
<tr>
<th>Organization</th>
<th>Module</th>
<th>Role</th>
</tr>
</thead>
</table>

Cancel  Back  Delete  Submit

Figure 1.3.4: Assign Role Screen
Edit User

i. Select Manage User Account from the main screen.
ii. Select user from the Registered Users screen.
iii. Edit user information and click Submit.

Edit Role

i. If you are editing the role, click Assign Role.
ii. Select Organization from the pick list.
iii. Select Module.
iv. Select Role from the pick list.
v. Click Submit.
User Account

First Name: John
Last Name: Doe
Address: 
Email: 
MIC UserID: J Doe
Password: 
Re-type Password: 

Cancel  Submit

Figure 1.3.6: Edit User Screen

Registered Users

<table>
<thead>
<tr>
<th>Name</th>
<th>Role Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Otto Jane</td>
<td>Super user</td>
</tr>
<tr>
<td>Savage Sean</td>
<td>Not Assigned</td>
</tr>
<tr>
<td>Yu Yang</td>
<td>Super user</td>
</tr>
</tbody>
</table>
| Yu Yang - 2   | [Ak&eKYUK]  
                Cataloger/import/export/map |
|               | [Ak&eKYUK]  
                Cataloger/import/export/map |

Delete User  Assign Role(s)

Figure 1.3.6: Registered User Screen
**Delete User**

i. Select *Manage User Account* from the main screen.

ii. Select user from the Registered Users screen.

iii. Click *Delete User*.

**Delete Role** (not implemented in the current version)

![Registered Users Table]

---

**Step 2: Metadata Management**

You must complete Step 1 prior before you are able to create metadata. There are two ways to create metadata in OpenMIC.

1) Create metadata manually. This option allows users to create one metadata record at a time.

2) Batch import. This option allows users to batch load metadata from an existing database.
2.1) **Create Metadata Manually**

i. Select *Manage MIC Union Catalog.*

ii. Select *Metadata and digital object.*

iii. Select *Collection* from the collection list.

iv. Select *Metadata Cataloging* from the welcome screen.

v. Select *Start Cataloging.*

vi. Click *Create Metadata.*

vii. Enter metadata. For information about the metadata elements, please refer to Metadata Guides found on the download page.

viii. Click *Save.*

---

**Tips:**

1. In some cases, all or many of the resources in a collection will share same metadata. Some technical metadata and rights metadata might be identical. The template utility allows collection managers and metadata creators to create generic records that contain default data. When a template is enabled, this default data is added to the metadata record automatically when *Create Metadata* is selected.

2. Templates can be enabled at the collection level or at resource level. To enable a template at resource level, click on *Template,* select *template* from the template list and click *Apply.*

Refer to 2.1.1 to create template.
Metadata Screen Navigation Help

**VIEW ENTRIES**
View metadata in plain text.

**TEMPLATE**
Enable collection level template or personal template when creating metadata record.

**CLEAR ALL**
Clear all data values in the record.

**SAVE**
Save all data values and exit.

**EXIT**
Exit without saving data values.

**Tab to Toggle between**
Descriptive MD, Source MD, Technical MD, and Rights MD.

**View/Edit source-technical MD relationship**
Establish relationship between source and technical metadata when creating multiple instances of source and technical metadata for a resource object.

**Metadata for item 1**
Enter multiple descriptive metadata for a resource object.

**Display Option: All Elements**
Display all metadata elements.

**Display Option: REQUIRED elements only**
Display required metadata elements only.

**Display Option: REQUIRED elements only**
Enter metadata for item 1.

**NAVIGATOR**
Jump to an element on this page. Use mouse scroll wheel to move up and down the list.

**Display option: All Elements**
ALL elements

**Display option: REQUIRED elements only**
REQUIRED elements only

**KYUK Collection (KYUK-TV)**
Template used: [none]
Figure 2.1.1: Main Screen

- **Administration**
  Manage organizations, collections, and transactions, perform database cleanup, create announcements.

- **Configuration**
  Configure metadata cataloging, digital file handling, mapping, batch import, and export utilities according to organization policies.

- **Reports**
  View or print statistical reports about your metadata or digital files.

- **Metadata and digital objects**
  Create or edit cataloging records, create or upload digital objects, map schemas, import, export, etc.

Figure 2.1.2: MIC Catalog Main Screen
## Organization - Collection List

<table>
<thead>
<tr>
<th>Organization / Collection</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oregon Health &amp; Science University Library</td>
<td></td>
</tr>
<tr>
<td>Pacific Film Archive</td>
<td></td>
</tr>
<tr>
<td>Walter J. Brown Media Archive &amp; Peabody Awards Collections</td>
<td></td>
</tr>
<tr>
<td>Smithsonian Institution Archives</td>
<td></td>
</tr>
<tr>
<td>National Library of Medicine</td>
<td></td>
</tr>
<tr>
<td>Library of Congress Motion Picture, Broadcasting, and Recorded Sound Division</td>
<td></td>
</tr>
<tr>
<td>Fortunoff Video Archive for Holocaust Testimonies</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 2.1.3: Collection List Screen**

### Welcome to the MIC Union Catalog!

[ Oregon Health & Science University Library ]

- [ ] Customize system settings for this collection

- Metadata Cataloging
- Mapping Utility
- Batch Import
- Export
- Exit/Change Collection

**Figure 2.1.4: Cataloging Screen**
Welcome to the Cataloging Utility for MIC Union Catalog!

The Cataloging Utility is a flexible cataloging tool for creating, editing, or deleting metadata records in MIC Union Catalog. Set up templates to reduce inputting time.

For help or more information, please visit the MICUC help center or contact the MIC administrator.

Figure 2.1.5: Start Cataloging Screen

Figure 2.1.6: Metadata Record List Screen
2.1.1) **Create Template**

There are two levels of template available in the OpenMIC -- collection level and personal level. To create a collection level template, the user must have “Configure Cataloging Utility” permission. A collection level template can be applied to all resources within the collection by metadata creators who have access to the collection. If the collection level template is set as a default template, it is applied to metadata record automatically when *Create Metadata* is selected. If it is not set as a default template, metadata creators can enable the template at the time they create metadata record.

A personal level template is created by metadata creator. Templates created at this level are available only to the owner of the template. If a personal level template is set as a default template, it is applied to metadata record automatically when *Create Metadata* is selected. If it is not set as a default template, metadata creators can enable the template at the time they create metadata record.

Follow the steps below to create collection level template:

i. Select *Metadata and digital objects* from the MIC Catalog screen.

ii. Select *Customize system settings for this collection*

iii. Select *Template*.
iv. Select *Create New Template*. You will get a screen similar to *Create Metadata* screen.
v. Enter data values that will be shared by all the resources in this collection.
vi. Click *Save*.
vii. If you want to save an existing metadata record as a template, select *Use Existing Metadata*.
viii. Select the record to use as template.
ix. Click *Apply to Template*.
x. All the data values from the selected metadata record will be auto populated in the record. Enter main title for this template.
xii. If you want to save this template as a default template, click *Set Default* button.

- **Administration**
  Manage organizations, collections, and transactions, perform database cleanup, create announcements.

- **Configuration**
  Configure metadata cataloging, digital file handling, mapping, batch import, and export utilities according to organization policies.

- **Reports**
  View or print statistical reports about your metadata or digital files.

- **Metadata and digital objects**
  Create or edit cataloging records, create or upload digital objects, map schemas, import, export, etc.

Figure 2.1.1.1: OpenMIC Main Screen
Welcome to the MIC Union Catalog!

[ KYUK Collection ]

- Customized system settings for this collection
- Metadata Cataloging
- Mapping Utility
- Batch Import
- Export
- Exit/Change Collection

Figure 2.1.2: Main Cataloging Screen

**Template List**

- Exit
- View: METS, TEXT
- Delete, Edit, Create New Template

<table>
<thead>
<tr>
<th>System ID</th>
<th>Template</th>
<th>Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>3096</td>
<td>Test template collection level for bug 766</td>
<td></td>
</tr>
<tr>
<td>36</td>
<td>Newsfilm template</td>
<td></td>
</tr>
</tbody>
</table>

Figure 2.1.3: Template list screen
### Descriptive MD

<table>
<thead>
<tr>
<th>Source MD</th>
<th>Technical MD</th>
<th>Rights MD</th>
<th>Deploy option</th>
<th>All Elements</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Indicates required element for all metadata types.

#### Collection Template

<table>
<thead>
<tr>
<th>Type of Item</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Title Information

<table>
<thead>
<tr>
<th>Type</th>
<th>Title</th>
<th>Subtitle</th>
<th>Part Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 2.1.1.4: Template data entry screen

### Existing Resource for Collection 6

<table>
<thead>
<tr>
<th>Resource Name</th>
<th>Created Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hallmark hall of fame</td>
<td></td>
</tr>
<tr>
<td>Winter mind</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>test for location Physical Location source value</td>
<td></td>
</tr>
<tr>
<td>Test of technical metadata data dictionary</td>
<td></td>
</tr>
<tr>
<td>Knitting from knitting template</td>
<td></td>
</tr>
<tr>
<td>Test for source disappearing after required field display invoked</td>
<td></td>
</tr>
<tr>
<td>Michael [joes] Nancy</td>
<td></td>
</tr>
<tr>
<td>Enwan I Luk Rose</td>
<td></td>
</tr>
<tr>
<td>Varua-Tai, of land and sea</td>
<td></td>
</tr>
<tr>
<td>Solid sistas documentary</td>
<td></td>
</tr>
<tr>
<td>Days made of fear</td>
<td></td>
</tr>
<tr>
<td>Boy of Baghdad</td>
<td></td>
</tr>
<tr>
<td>Las Claves de la masacre</td>
<td></td>
</tr>
<tr>
<td>49th Star</td>
<td></td>
</tr>
</tbody>
</table>

Figure 2.1.1.5: Existing metadata record screen
Follow the steps below to create personal template:

i. Select Metadata and digital objects from the MIC Catalog screen.
ii. Select Metadata Cataloging.
iii. Select Setup Personal Template.
iv. Select Create New Template. You will get a screen similar to Create Metadata screen.
v. Enter data values that will be shared by all the resources in this collection.
vi. Click Save.

vii. If you want to save an existing metadata record as a template, select Use Existing Metadata.

viii. Select the record to use as template.
ix. Click Apply to Template.
x. All the data values from the selected metadata record will be auto populated in the record. Enter main title for this template.
xi. Click Save.
xii. If you want to save this template as a default template, click Set Default button.

---

- **Administration**
  Manage organizations, collections, and transactions, perform database cleanup, create announcements.

- **Configuration**
  Configure metadata cataloging, digital file handling, mapping, batch import, and export utilities according to organization policies.

- **Reports**
  View or print statistical reports about your metadata or digital files.

- **Metadata and digital objects**
  Create or edit cataloging records, create or upload digital objects, map schemas, import, export, etc.

---

Figure 2.1.1.6: OpenMIC main screen

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Welcome to the MIC Union Catalog!

[ KYUK Collection ]

- Customize system settings for this collection
- Metadata Cataloging
- Mapping Utility
- Batch Import
- Export
- Exit/Change Collection

Figure 2.1.6: Main Cataloging Screen

Welcome to the Cataloging Utility for MIC Union Catalog!

The Cataloging Utility is a flexible cataloging tool for creating, editing, or deleting metadata records in MIC Union Catalog. Set up templates to reduce inputting time.

For help or more information, please visit the MICUC help center or contact the MIC administrator

- EXIT
- Setup Personal Template
- Start Cataloging

Figure 2.1.7: Cataloging Screen
Figure 2.1.1.8: Template list screen

Figure 2.1.1.4: Template data entry screen
2.1.2) Create Multiple instances of metadata

2.2) Batch load existing metadata

Metadata from existing database(s) can be batch loaded into OpenMIC. The OpenMIC has built-in MARCXML and MODS XML mapping tools which allow the metadata creators to automatically maps metadata into the OpenMIC database. If metadata is in any other format, you need to map your data elements to OpenMIC database using the Mapping Utility.

Follow steps below to batch load metadata from existing database(s).

Step 1: Mapping Data elements

i. Select *Metadata and Digital objects* from the OpenMIC Main Screen.

ii. Select *Mapping Utility*.

iii. Select *Simple MIC Display* to map MIC elements or *Full METS/MODS* to map your metadata elements.
iv. Select Create or Revise Mapping.

v. If you have selected, Simple MIC Display option in step iii, you will get MIC Mapping Template Screen (figure 2.2.1.2). Follow the screen instructions to map your metadata elements.

vi. If you have selected, Full METS/MODS option, you will get a screen to enter a map name and to select schema of your records (figure 2.2.1.3). Enter name and select schema.

vii. Click save.

viii. If you have selected MARC (xml) or MODS (xml), mapping is automatically provided by OpenMIC. Proceed to step 2.

ix. If you have selected In-house (text), you must map metadata elements from the in-house database to the OpenMIC database. You also need to export the metadata in .txt.

x. Enter the name of the elements in the same order as it appears from the in-house database.

xi. If there are more than 10 elements in the database, click More fields.

xii. Use edit tools “<<” and “X” to insert or remove data elements from the list.

xiii. Enter the field delimiter used to create your text file.

xiv. Click Update Fields.

xv. You will get a screen to map the in-house data elements to the OpenMIC database.

xvi. Select the element on the left side of the window from the in-house database and select the appropriate OpenMIC database element. This will automatically map these two elements and these elements will appear in the mapping list. To edit mapping, click on the radio button.

xvii. If the data elements have multiple values, enter the value separator in the “Multi-value Separator” box in the mapping results window.

xviii. When you are done with mapping, click Save.

xix. Now you can upload the text file to check mapping before starting the batch import.

xx. Select the sample file from the pull down list.

xxi. Browse and Upload a sample text file. It is recommended to prepare a sample file to test mapping.

xxii. Click Submit.

xxiii. Select Check Map from the Mapping Screen.

xxiv. Sample records will be displayed on the screen.

xxv. Select a record and click on TEXT or XML (METS) to view the mapping.

xxvi. Review uploaded records. If you are satisfied with the mapping results, proceed with batch import.
MIC UC Mapping Utility

The MIC mapping utility walks you through a two-step process to map your record format to the MIC Union Catalog.

Mapping Procedure:
1. Select which destination schema you want to map to, Simple MIC Display or Full METS/MODS.
2. Use a template to indicate how the fields in your local database or spreadsheet translate (map) to MIC Union Catalog fields.
3. Upload up to 25 sample records.
4. Check the map. Review how your sample records display in the MIC Union Catalog according to the template.

You can go back and revise the template until the records display to your satisfaction. Your saved template will then be reviewed and approved by the MIC administrator.

Map to:
- Simple MIC Display
- Full METS/MODS

Create or Revise Mapping
Upload Sample Records
Check Map
EXIT

Figure 2.2.1.1: Mapping Screen

MAPPING TEMPLATE

Jump to:

1. Title

This data element contains the main title of the resource described in the cataloging record or metadata. If the record describes an individual moving image, that title will go here. If the record describes a group of moving images (a collection) the title which collectively describes the group will go here. If the record describes a single episode of a television series, theatrical serial, or newscast, both the series and episode display titles will typically go here. "Parallel titles" (equivalent titles in foreign languages) and "other titles" (i.e., subtitles), will also go here. Uniform titles, variant titles, titles of related works, and titles of works contained within the entry described, go elsewhere, as do series titles for educational series. This data element is not repeatable.

Examples:
- Plants and species of native grasslands
- Piper Headstock classic film collection; Early Hitchcock clips
- I love Lucy 1954-05-17, Golf game

When this title appears in the MIC Union Catalog display, it is preceded by TITLE. Any punctuation which appears in your own title field will display, unless you ask MIC to drop the end punctuation. Any initial article which appears in your own title field will display in MIC. MIC files alphabetically; if the title is The Man of the Hour, the record will file under 'T' for 'The.' In MIC, the information contained in this field is retrieved in TITLE searches.

SHOW ME A SAMPLE MIC DISPLAY

Figure 2.2.1.2: Simple MIC Mapping Template screen

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Mapping To MIC Union Catalog

Please follow steps below to map your records to MIC Union Catalog.

Enter a name (ID) for the mapping:  
OR  
Select an existing mapping to edit:  

Schema of your records:  
- In-house (text)  
- MARC (xml)  
- MODS (xml)  

[Submit, Cancel]

Figure 2.2.1.3: MIC Mapping Screen
Please follow steps below to map your records to MIC Union Catalog.

**Figure 2.2.1.4: Mapping Field List Screen 1**

**Step 1. Provide field list**

Please enter the field names in exact order of the fields in your metadata `txt` file (even if the field has no values):

<table>
<thead>
<tr>
<th>Order</th>
<th>Field Name</th>
<th>Edit Tool</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>&lt;&lt;</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>&lt;&lt;</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>&lt;&lt;</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>&lt;&lt;</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>&lt;&lt;</td>
</tr>
<tr>
<td>6</td>
<td></td>
<td>&lt;&lt;</td>
</tr>
<tr>
<td>7</td>
<td></td>
<td>&lt;&lt;</td>
</tr>
<tr>
<td>8</td>
<td></td>
<td>&lt;&lt;</td>
</tr>
<tr>
<td>9</td>
<td></td>
<td>&lt;&lt;</td>
</tr>
<tr>
<td>10</td>
<td></td>
<td>&lt;&lt;</td>
</tr>
</tbody>
</table>

Edit Tool:  << Insert before this field.  X Remove this field.  more fields
Step 2. Map Metadata Fields

To do the mapping, select an In-house DB element (left), then a matching element in our system (right). Repeat the step until done:

**In-house DB Element** | **Target Element**
--- | ---
genre | Descriptive metadata

Table of Contents
Type of Resource
Element
MARC Portal ID
Main Title
SubTitle
Main Title - Type
Main Title - Part Name
Main Title - Part Number
Main Title - Nonsort
Identifier - Type
Identifier
Identifier - Display Label
Identifier - Invalid
Language - Term source
Language
Language - Term Type
Language - Object Part
Genre Source
Genre

**MAPPING RESULT**

(Click radio button to remove from the list)

<table>
<thead>
<tr>
<th>In-house DB Element</th>
<th>Multi-value Separator</th>
<th>Target Element</th>
</tr>
</thead>
<tbody>
<tr>
<td>title</td>
<td></td>
<td>Main Title</td>
</tr>
<tr>
<td>genre source</td>
<td></td>
<td>Genre Source</td>
</tr>
</tbody>
</table>

Figure 2.2.1.5: Mapping Field List Screen 2
Upload Sample Records

CatFileID: Organization: Oregon Health & Science University Library
Metadata Schema: Record Format: The sample file is for this mapping: [ ]

Upload Sample File:
Find the sample file on your local computer by using Browse button, OR enter the full file path (e.g., C:\myrecord\sample.txt):

[ ] Browse...

If you prefer to send CD or floppy disk, please send the CD or floppy to the following address (please make sure to indicate which collection each file belongs to):

Jane Johnson Otto
MIC Administrator
Library of Congress
Packard Campus
19053 Mount Pony Road
Culpeper, VA 22701-7551

Exit Submit

Figure 2.2.1.6: Upload Text File Screen

Review Uploaded Samples

Select a mapping for review: Mapping: test

sample 1 sample 2 sample 3 sample 4 sample 5 sample 6
sample 7 sample 8 sample 9 sample 10

Exit

Figure 2.2.1.7: Review Sample Records Screen
Step 2: Batch Import

i. Select Batch Import from the Main cataloging Screen.

ii. Select Metadata Schema.

iii. Select Record Format (XML for MARC and MODS; TXT (tab-delimited) for in-house (text).

iv. Select Mapping Name.

v. Select “Yes” if the file has already been uploaded, otherwise, select “No”.

vi. Select Show Step2.

vii. If you have selected “Yes”, select an uploaded file to import from the pull down.

viii. If you have selected “No”, you will be prompted to select the location of the file.

ix. Select “Local Computer” if the file is on the PC; otherwise, select “Server”.

x. Click Show Step 2.

xi. If you have selected “Local Computer”, browse and select the file.

xii. Click Upload/Import.

xiii. If you have selected “Server”, enter the absolute path of the file.

xiv. Click Upload/Import.

xv. Click Refresh check the status of the import.

xvi. Once the import is completed, you will be able to review the records in the metadata record list.

---

**Metadata Import**

**Step 1. Provide metadata and file information**

- Metadata Schemas: [Dropdown]
- Record Format: [Dropdown]
- Select a mapping: [Dropdown]
- Files already uploaded to the server? [Yes/No]

**Show step 2**

**Step 2. Upload/import metadata file to the system**

Please complete Step 1 first to see upload and/or import options.

**Import Status**

<table>
<thead>
<tr>
<th>Total Record</th>
<th>Finished</th>
<th>Error</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

[Clear] [Refresh]

---

Figure 2.2.1.8: Metadata Import Selection Screen

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Metadata Import

Step 1. Provide metadata and file information

- Metadata Schema: In-house (ext)
- Record Format: TXT (tab-delimited)
- Select a mapping: Mapping text
- Files already uploaded to the server? Yes No

Step 2. Import uploaded file(s) to the database

Select an uploaded file to import

Import Status

<table>
<thead>
<tr>
<th>Total Record</th>
<th>Finished</th>
<th>Error</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

Exit

Figure 2.2.1.9: Metadata Import File Upload/import Screen 1

Metadata Import

Step 1. Provide metadata and file information

- Metadata Schema: In-house (ext)
- Record Format: TXT (tab-delimited)
- Select a mapping: Mapping text
- Files already uploaded to the server? Yes No
- Upload file(s) from: Local computer Server

Step 2. Upload metadata file and import to the system

File or directory path: [Browse]

Note: If you enter a path for a directory instead of a file, all the files in that directory will be imported. In this case, you need to make sure that the directory only contains the files that need to be imported.

Upload / Import

Figure 2.2.1.10: Metadata File Upload /import Screen Screen 2
**Step 3: Export (Optional)**

There are two possible scenarios when you may want to export records:

1) Organization using a repository may export the bibliographic records in the OpenMIC database as METS and convert to your repositories native schema using third-party tools or XSLT transformations provided by you.

2) Organization with no repository may export a copy of the bibliographic records in the OpenMIC database as METS and made available to an XML search and retrieval facility, such as Lucene or Zebra.

---

**Note:** Organization with Fedora repository may use OpenMIC to manage metadata. You need to add the file section in the xml before ingesting into fedora repository or wait until OpenWMS is ready for download.

---

Follow steps below to export records:

i. Select Export from the Main Cataloging Screen.

ii. Select Export Format (METS).

iii. Select Export Destination (File).

iv. File export option will automatically be set to “one record per file”.

v. Select File Name Prefix.

vi. Specify record(s) to export.

   o There are three options available. “All records of this collection” will export every record in the collection in a separate file under the export directory configured by the system administrator.

   o If “A subset of this collection “is selected, a pop-up box will be prompted to select a range to export.

   o If “Single record” is selected, a pop-up box will be prompted to select a record to export.

vii. Click Export.

viii. Click Refresh to monitor the progress of export.
Figure 3.1: Export Screen