

Using a Controlled Vocabulary

A controlled vocabulary defines a list of valid terms that can appear in metadata fields within CONTENTdm. Enabling a controlled vocabulary helps ensure consistent and rapid metadata entry.

This tutorial describes the use of controlled vocabularies within CONTENTdm. This guide assumes you have CONTENTdm Administrator rights to configure settings and field properties within the collection. For more information on creating a collection or obtaining CONTENTdm Administrator rights, please see your CONTENTdm Administrator or consult the CONTENTdm Installation and Administration Guides available at <https://www.oclc.org/community/contentdm/Downloads.en.html>.

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Section I: What is a Controlled Vocabulary?

A controlled vocabulary is a list of valid terms that can appear in metadata fields within CONTENTdm. These terms may be either single words or multi-word phrases. A controlled vocabulary can be defined for any field in CONTENTdm, and the contents of that field will be restricted to those terms only. (The only exception is that controlled vocabularies cannot be used with administrative fields.)

Controlled vocabularies can be shared between fields and collections, which means that they can be edited by other collection administrators. For more information about sharing and managing a shared controlled vocabulary, see the **Using Controlled Vocabulary** topic in the Help files.

Several lists of standard terms for cataloging collections already exist. One such list is the Library of Congress Thesaurus for Graphical Materials I, consisting of more than 6,300 terms for indexing visual materials. Developed to support the cataloging and retrieval needs of the Library of Congress Prints and Photographs Division, this list is one of CONTENTdm's controlled vocabulary list options.

In addition to the nine controlled vocabulary lists that may be accessed in CONTENTdm, you can import your own list of collection-specific terms and establish this list as your controlled vocabulary. Or, after entering metadata for a portion of your collection, you may generate a controlled vocabulary based on the existing metadata for any given field.

Section II: Enabling a Controlled Vocabulary

Enabling a controlled vocabulary helps ensure consistent and rapid metadata entry. Additionally CONTENTdm provides the flexibility to add and approve new controlled vocabulary terms throughout

the collection building process, as well as to share a controlled vocabulary between fields and collections.

To enable controlled vocabulary for any field:

1. Click **CONTENTdm Administration** from the left task bar of the Project Client or click **CONTENTdm Administration** from the Administration menu of the Project Client. Or, in your browser address bar, enter `http://your.server.address/cgi-bin/admin/start.exe`.
2. Enter your user name and password, if prompted.
3. Click the **Collections** tab to access collection administration. Then click **Fields**.

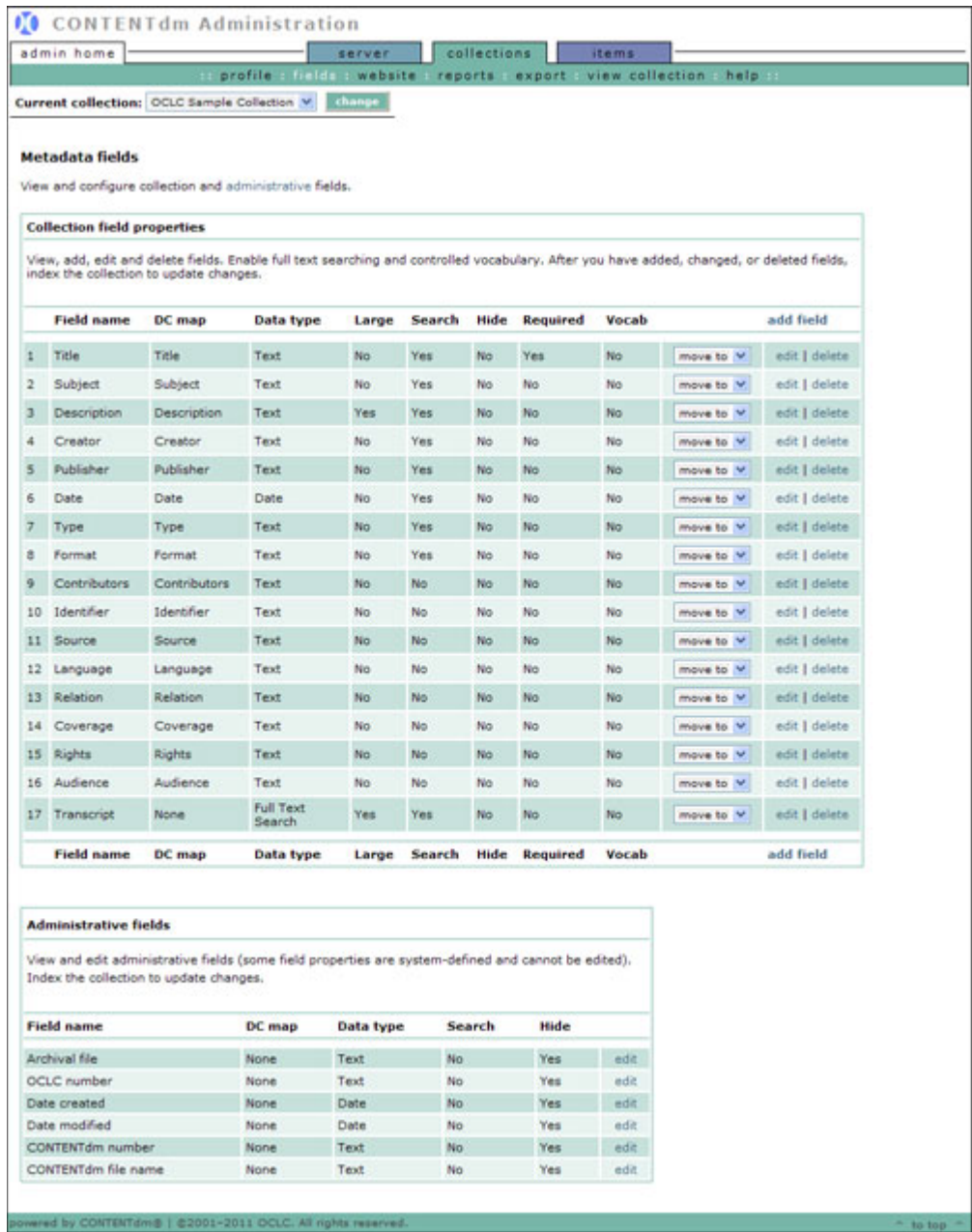


Figure 1. Metadata Fields Page

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4. In the Metadata Fields page, determine which field you wish to change.
5. Click the **Edit** link in that field row. The Edit Field page opens. (**Controlled Vocabulary** is disabled, set to **No**, by default.)

The screenshot shows the 'Edit field' page in the CONTENTdm Administration interface. The page title is 'CONTENTdm Administration' and the current collection is 'OCLC Sample Collection'. The form contains the following fields:

Field name	Subject
DC map	Subject
Data type	Text
Show large field	No
Searchable	Yes
Hidden	No
Required	No
Controlled vocabulary	<input checked="" type="radio"/> No <input type="radio"/> Yes

A 'save changes' button is located at the bottom right of the form. The footer of the page reads 'powered by CONTENTdm® | ©2001-2011 OCLC. All rights reserved.' and includes a 'to top' link.

Figure 2. Edit Field Page

6. Select **Yes** to enable controlled vocabulary and display the **Select and share controlled vocabulary** options.

The screenshot shows the 'Edit field' page in the CONTENTdm Administration interface. The page title is 'CONTENTdm Administration' and the current collection is 'OCLC Sample Collection'. The field being edited is 'Subject'. The 'Controlled vocabulary' section is expanded, showing several options:

- Create a new controlled vocabulary for this field
 - Use Art & Architecture Thesaurus (AAT) [view thesaurus]
 - Use the existing contents of the field
 - Import vocabulary from a file on the server. File must contain one term per line. Specify the complete path of the file on the server, such as D:\server\data\file.txt
 - Share this controlled vocabulary across other fields and collections. (Caution: Sharing the controlled vocabulary means that it can be edited in other collections.) Name shared vocabulary: _____
 - Do not share this controlled vocabulary
 - Use a controlled vocabulary from another field or collection. Choose the controlled vocabulary: _____

A 'save changes' button is located at the bottom right of the form.

Figure 3. Edit Field Page — Select and Share Controlled Vocabulary

Select whether you want to create a new controlled vocabulary or whether you want to use a controlled vocabulary that is used already by another field or collection and has been enabled for sharing.

To create a new controlled vocabulary for the field:

1. Select what kind of controlled vocabulary list to use:
 - **Use (select from the drop-down list).** Establishes a controlled vocabulary for the field according to any one of these nine standard lists of terms below.
 1. Art & Architecture Thesaurus® (AAT)
 2. Dublin Core Metadata Initiative Type Vocabulary
 3. Getty Thesaurus of Geographic Names® (TGN)
 4. Guidelines on Subject Access to Individual Works of Fiction, Drama, Etc., 2nd ed., form and genre
 5. Maori Subject Headings / Nga Upoko Tukutuku
 6. Medical Subject Headings® (MeSH) 2010
 7. Newspaper Genre List
 8. Thesaurus for Graphic Materials: TGM I, subject terms
 9. Union List of Artist Names® (ULAN)

For descriptions of these thesauri, see www.oclc.org/us/en/terminologies/default.htm.

You can review the selected thesaurus by clicking **View Thesaurus**. A window opens, displaying the terms in the thesaurus.

You may make modifications to the lists to suit your needs. Note that any changes made affect this copy of the vocabulary as used within CONTENTdm (not the source file maintained by the Authorities agency), whether the vocabulary is not shared or is shared between CONTENTdm collections or fields within this collection.

- **Use existing contents of the field.** Automatically generate a controlled vocabulary list from the existing contents of a field. After adding metadata to a portion of the items in your collection, you can enable a controlled vocabulary based on the existing contents of a field within the metadata. Multiple terms can be entered in a single field as long as each term is separated by a semicolon.
 - **Import vocabulary from a file on the server.** A controlled vocabulary list may be imported from a text file. Use this option if you have a list or wish to create your own list of acceptable terms. The file must have one term per line and the file must be saved as a text file (.txt). Enter the file name and its location in the text box provided. After the terms are imported, you may delete the file on the server. Remember the file location because you must specify the full path to the file at the time that you select it. The maximum number of characters allowed in a single term within your text file is 128 characters.
2. Select whether this new controlled vocabulary should be shared, making it available to other fields. (For more information, see the **Sharing and Managing a Shared Controlled Vocabulary** topic in the Help files.)

If you choose to share the controlled vocabulary, specify a name that is unique among controlled vocabularies across all collections on your server. This name will later display in the **Choose the Controlled Vocabulary** drop-down list when editing other fields. The name also will be used on administration pages as an identifier. (Note: After the controlled vocabulary is named and saved, you cannot change the name later. Be sure to consider the naming across your organization.)
 3. Click **Save Changes**. The Metadata Fields page displays. The **Vocab** column for the field is updated to display **Yes** (or **Yes-shared**, if you shared the new controlled vocabulary).

To use a controlled vocabulary from another field or collection:

1. Select **Use a Controlled Vocabulary from Another Field or Collection**. Then choose the controlled vocabulary by name from the drop-down list. (If the list contains no options, there are no shared controlled vocabularies available.)
2. Click **Save Changes**. The Metadata Fields page displays. The **Vocab** column for the field is updated to display **Yes-shared**.

If you have a project open that is related to the collection for which you just established a controlled vocabulary, you must close and then reopen the project in order for the controlled vocabulary to take effect in the Project Client.

Section III: Administering a Controlled Vocabulary

After a controlled vocabulary has been enabled for a field, you can administer the controlled vocabulary by adding, deleting, browsing, or verifying terms.

Note: If you are administering a shared controlled vocabulary, any changes will also change the contents of the vocabulary in other fields and collections that use it. A good practice is to always review the list of fields and collections sharing the controlled vocabulary before making changes to help you determine the impact. For more information, see the **Using Controlled Vocabulary** topic in the Help files.

To administer controlled vocabulary:

1. Open CONTENTdm Administration.
2. Enter your user name and password if prompted.
3. Click the **Collections** tab. Then, click **Fields**.
4. Click **Edit** in the row of the field for which you wish to administer the controlled vocabulary. The Edit Field page opens.

The screenshot shows the 'Edit field' page in the CONTENTdm Administration interface. The page title is 'CONTENTdm Administration' and the current collection is 'OCLC Sample Collection'. The 'Edit field' section shows a form for the field 'Subject'. The form includes fields for 'Field name', 'DC map', 'Data type', 'Show large field', 'Searchable', 'Hidden', 'Required', and 'Controlled vocabulary'. The 'Controlled vocabulary' field has radio buttons for 'No' and 'Yes', with 'Yes' selected. A 'save changes' button is at the bottom right.

Figure 4. Edit Field Page

5. Click **Administer Controlled Vocabulary** (or **Administer Shared Controlled Vocabulary**, if shared). The Administer Controlled Vocabulary page for the field that you select opens.

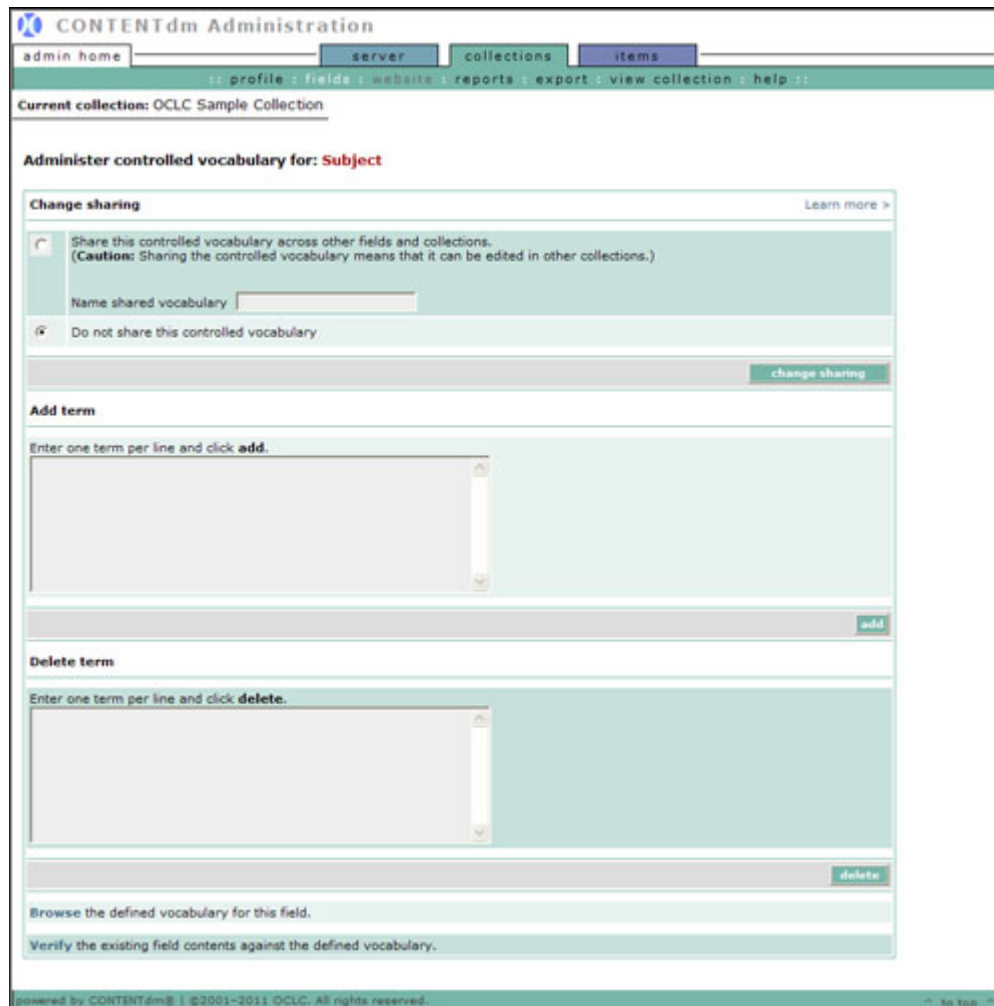


Figure 5. Administer the controlled vocabulary for the Subject field

From this page, you can add a single new term or multiple terms to the controlled vocabulary list. New terms may consist of more than one word, but each term must be entered on a separate line.

You may also delete terms, browse the complete list of terms, and verify if the terms used in a specified field of your collection conform to the defined controlled vocabulary list.

If you decide to make this controlled vocabulary available to use by other fields and collections, you can also change the sharing setting. Before you decide to enable a shared controlled vocabulary, there are several issues to consider. For more information, see the **Using Controlled Vocabulary** topic in the Help files.

To enable sharing of a controlled vocabulary:

From the Controlled Vocabulary Administration page:

1. In the **Change Sharing** section, select **Share this Controlled Vocabulary Across Other Fields and Collections**.
2. Type a unique name for the shared controlled vocabulary.

Note: This name will later display in the **Choose the Controlled Vocabulary** drop-down list and will be available when editing other fields and collections. The name also will be used on administration pages as an identifier. (After the controlled vocabulary is named and saved, you cannot change the name later. Be sure to consider the naming across your organization.)

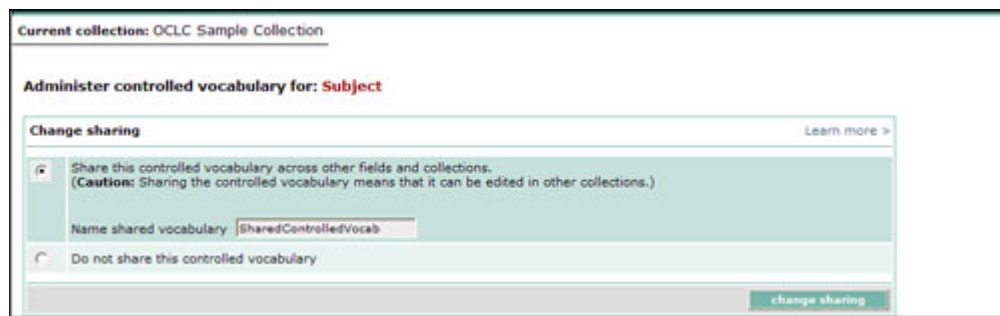


Figure 6. Sharing a controlled vocabulary

3. Click **Change Sharing** to save and reload the Administer Controlled Vocabulary page. The shared controlled vocabulary name is displayed in the page title.

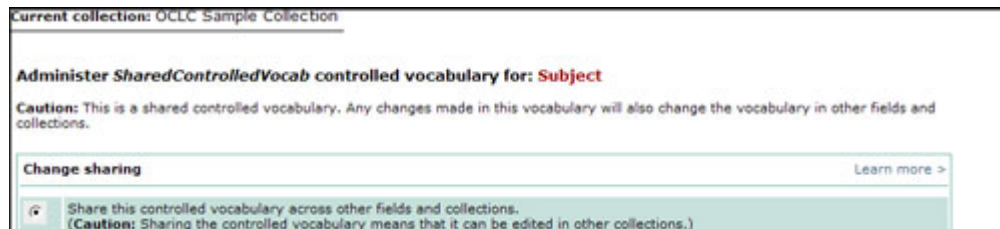


Figure 7. Changing the sharing status

Section IV: Entering Metadata Using a Controlled Vocabulary

You can add an item through the Project Client or using the CONTENTdm Web interface and then enter metadata.

Project Client

The Project Client downloads controlled vocabulary terms from the CONTENTdm server. You can limit the number of terms that are downloaded at one time; this can be especially useful if you know that a controlled vocabulary is especially large. The default is a maximum of 15,000 terms.

To change the number of terms that are downloaded:

1. In the Project Client, open a project linked to a Collection that has a controlled vocabulary field for which you wish to specify the number of terms to download.
2. Click **Edit Project Settings** in the left task pane.
3. Click **Project Options** in the left task pane.
4. Use the drop-down list at the bottom to select the number of terms that can be downloaded at one time. Or type in a number greater than 1000.
5. Click **OK** to close the **Project Options** dialog.

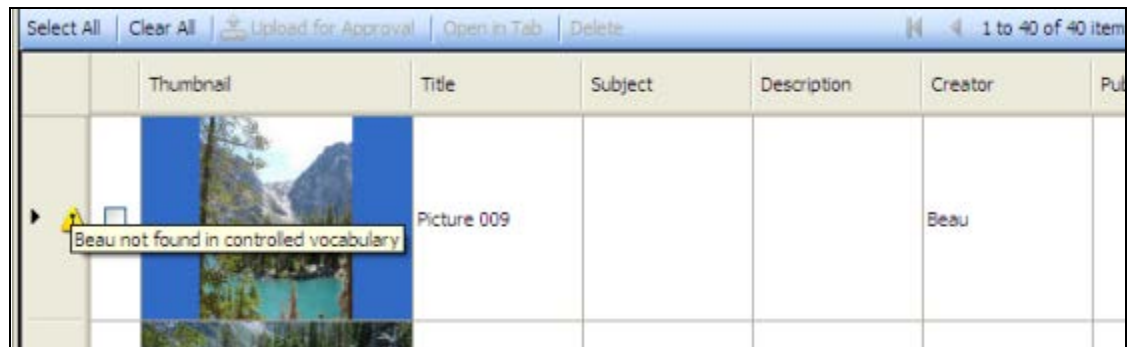
In the Item Editing tab you will see the list of controlled vocabulary terms as you enter metadata into fields that are governed by a controlled vocabulary. The terms that you enter into the controlled field are validated against the downloaded list.

To use the Item Editing tab to enter metadata using a controlled vocabulary:

1. Open your project in the Project Client
2. Navigate to the project spreadsheet.
3. Double-click on an existing item to open it in Item Editing tab, or import a new item into the project. The Item Editing tab opens displaying the record for editing.
4. Begin typing in the controlled vocabulary-enabled field. The controlled vocabulary list automatically displays the closest approved terms in the list. Double-click on a term in the controlled vocabulary list to add that term to the metadata field.

Using a Controlled Vocabulary

New terms for a controlled vocabulary may be proposed when entering data in the Project Client. The proposed terms will be added to the pending queue for approval. If an unapproved term is entered in the Project Client, users are warned of its non-compliance, but they can save and upload the item to the pending queue anyway. See Figure 8.



The screenshot shows a web interface with a table. At the top, there is a navigation bar with buttons: "Select All", "Clear All", "Upload for Approval", "Open in Tab", and "Delete". On the right side of the navigation bar, it says "1 to 40 of 40 items". The table has the following columns: "Thumbnail", "Title", "Subject", "Description", "Creator", and "Publ". The first row of the table contains a thumbnail image of a lake and mountains, the title "Picture 009", and the creator "Beau". A yellow warning icon is visible in the "Thumbnail" column, and a tooltip box is overlaid on the image with the text "Beau not found in controlled vocabulary".

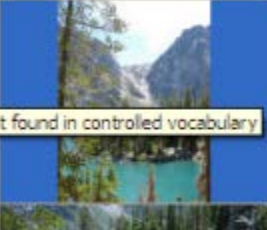
Thumbnail	Title	Subject	Description	Creator	Publ
	Picture 009			Beau	

Figure 8. Receiving a non-compliance warning

After you have uploaded an item with a term not found in the controlled vocabulary, the term will be displayed in the pending queue for approval by a CONTENTdm Administrator.

CONTENTdm Web Interface

The Add Item page of the CONTENTdm Web Interface shows a controlled vocabulary link adjacent to a field that has a controlled vocabulary. View the controlled vocabulary list in a separate window and then add your metadata.

To use the CONTENTdm Web Interface to enter metadata using a controlled vocabulary:

1. Open CONTENTdm Administration, click the **Items** tab, and then click **Add**. Or, if you do not have CONTENTdm Administrator rights, navigate with your Web browser directly to:
`http://your.server.address/cdm4/admin/items/add.php`
2. Enter your user name and password.
3. Select whether you wish to add an item or a URL. Then, either enter the URL or use the browse buttons to navigate to the item that you wish to add.
4. Add the metadata related to the item or URL.
5. If you are adding metadata to a field with a controlled vocabulary, you will see a link to controlled vocabulary adjacent to the field. Click **Controlled vocabulary** (or **Shared Controlled Vocabulary**, if the vocabulary used by the field is shared) to see a list of terms within the controlled vocabulary in a separate window. Enter a term from within that list of controlled vocabulary terms.

If you add a term that is not in the controlled vocabulary, a CONTENTdm Administrator can approve the item with a non-complying term, edit the item metadata, or add the term to the controlled vocabulary before adding the item to the collection.

Tip: Use CTRL C and Ctrl V to copy terms from the controlled vocabulary window and paste them to the field with the controlled vocabulary.

Section V: Adding Terms to a Controlled Vocabulary

From the Approve Items page, CONTENTdm Administrators can choose to add the proposed term by clicking **Add** or click **Edit** to view the item with the non-approved vocabulary term. You can also choose to **add all** suggested terms to the controlled vocabulary with one click.

To access CONTENTdm Administration Approve Items page:

1. Open CONTENTdm Administration.
2. Enter your user name and password, if necessary.
3. Select the **Items** tab to reach Item Administration.
4. Click **Approve** from the Item Administration page. This opens the pending queue.

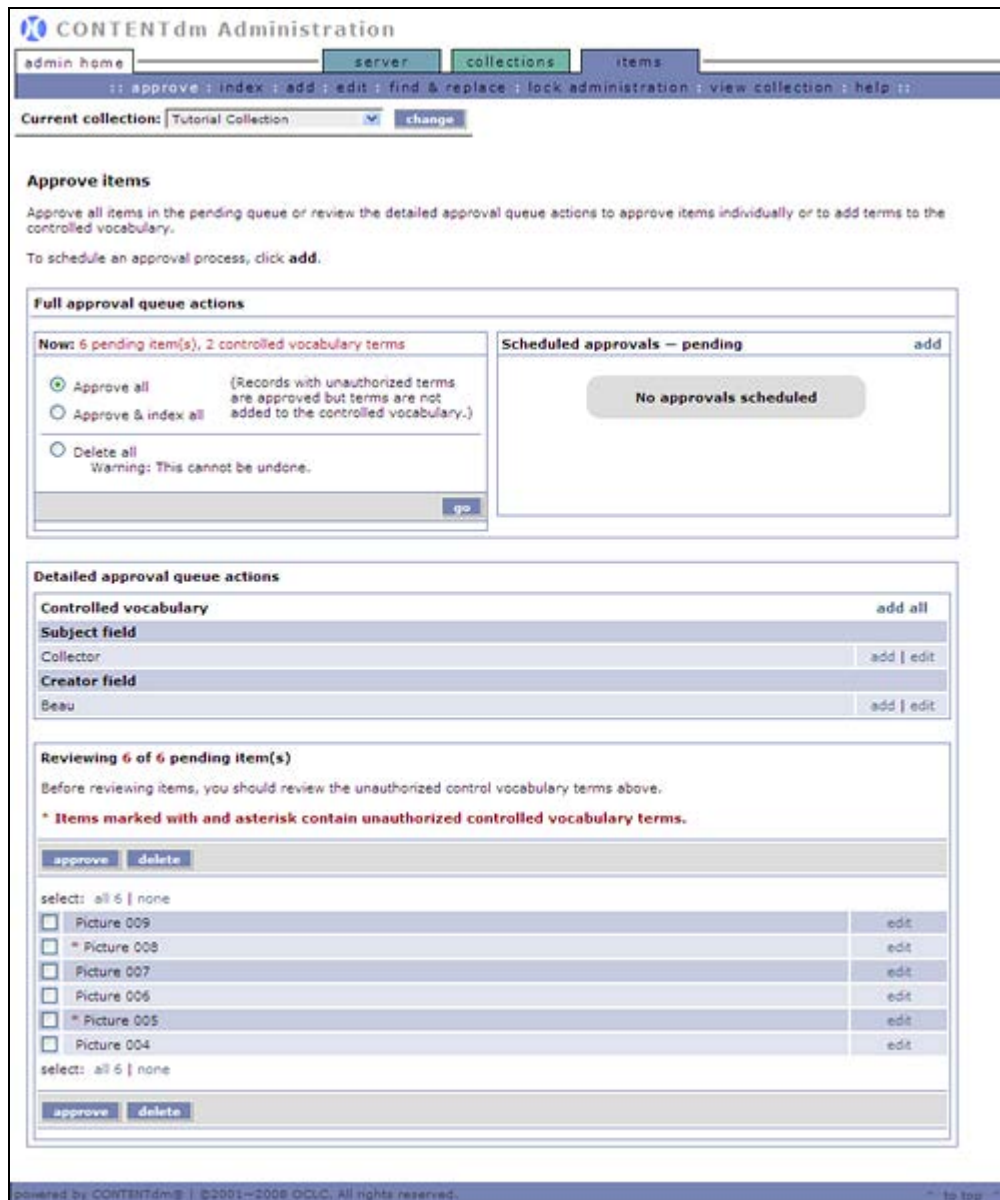


Figure 9. Approve Items Page

5. The CONTENTdm Administrator has the option of approving or deleting all items in the queue. Clicking **Approve all** adds records with unauthorized terms. Or the Administrator may choose to click **Add** to add the term to the controlled vocabulary or click **Edit** to edit the term for a specific item.

To edit metadata within a Controlled Vocabulary field and approve:

1. Click **Edit** to edit the non-approved controlled vocabulary term. The Edit List page opens.
2. Choose the item that you wish to edit from the list of items that contain the controlled vocabulary term and click **Edit**. The Edit Pending Item page opens.
3. Remove or edit the unapproved term. To view a list of approved terms in a separate window, click **Controlled vocabulary** (or **Shared Controlled Vocabulary**, if the vocabulary used by the field is shared). Enter the desired term in the controlled vocabulary field.

4. Click **Approve** to add the item to the collection.

You cannot approve an item from the Edit Pending Item page unless all terms in a controlled vocabulary field are within the controlled vocabulary list.

Section VI: Cross-reference Terms

In addition to storing a list of valid terms, the CONTENTdm controlled vocabulary feature supports cross-referenced terms. This allows you to map an invalid term that does not appear in the controlled vocabulary to a valid term that does. For example, you can map the word "cars" to the word "automobiles." The format is:

invalid-term USE *valid-term*

For example:

Cars USE Automobiles

These cross-referenced terms are stored in the same controlled vocabulary list with the valid terms.

To add cross-referenced terms when Controlled Vocabulary has been enabled:

1. Open CONTENTdm Administration.
2. Enter your user name and password if prompted.
3. Click the **Collections** tab. Then, click **Fields**.
4. Click **Edit** in the row of the field for which you wish to administer controlled vocabulary. The Edit Field page opens.
5. Click **Administer controlled vocabulary** (or **Administer Shared Controlled Vocabulary**, if shared). The Administer Controlled Vocabulary page for the field that you select opens.
6. Add a cross-referenced term by typing the terms in the format described above and clicking **Add**. The cross-referenced term will now appear in the controlled vocabulary list for use when catalogers enter metadata and when researchers search for items using the CONTENTdm Search Client.