Alliance Harvester: Contributing an OAI set for DPLA or Alliance Primo

Produced by the Digital Collections Working Group of the Content Creation & Dissemination Team
Janet Hauck, Whitworth University (chair)
Anneliese Dehner, Metadata Applications Librarian, Alliance (author of this document)
Laura Zeigen, Oregon Health & Science University
Julia Simic, University of Oregon
Theodore Gerontakos, University of Washington
Jodi Allison-Bunnell, Alliance (ex officio)

Version 1.0, May 2017

Table of Contents
Overview
Login
Setup Options
Edit your records (optional)
Enriching
Preview
Contribute

Overview
This document is intended to guide Alliance member institutions through the process of contributing a set of digital object metadata to the Alliance Harvester for ingest into Alliance Primo and/or DPLA.

Login
Accessing the Harvester’s back-end user interface requires a user account. The Alliance will provide your institution an account by sending your institution’s Content Creation & Dissemination (CCD) representative a username and password. When you visit the Alliance Harvester’s back-end contribution form, you will see an Authentication Required box like the screenshot below:
When you see this box, login with your institutional username and password.

**Setup Options**

After logging in to the Alliance Harvester’s back-end user interface, you will see a Set URL and destination(s) page like the screenshot below.
1. *Set URL*

In the “Set URL” text box, enter the Simple Dublin Core OAI request for one of your sets.

**Example OAI set urls:**


http://digitalcommons.linfield.edu/do/oai/?verb=ListRecords&metadataPrefix=simple-dublin-core&set=publication:lca_rich_photos/

Double-check that your metadataPrefix value matches one of the values below:

- Digital Commons users: `metadataPrefix=simple-dublin-core`
- Users of all other systems: `metadataPrefix=oai_dc`

2. *Destination(s)*

Select your destination preference from the “Destination(s)” drop-down menu. For more information about the contribution criteria for DPLA and Primo, click the blue info icon.

3. *Optional Enrichment*

Creators/Contributors

If you would like the Harvester to enrich creator and contributor values in this set, select “Yes...”. If not, select “No thank you”.
Genre

If you would like the Harvester to enrich genre values in this set, select “Yes...”. If not, select “No thank you”.

4. Contribution Agreement

Read the contribution agreement. Indicate you agree to the terms by clicking the checkbox to the right of “Agree”.

5. Continue

Click the “CONTINUE” button, on the right side of the page, to move on to the next step in the contribution process.
Editing your OAI records (optional)

The Harvester’s record editing page will open, its title asking “Would you like to edit records in this set?” On this page, you can choose to replace values in your OAI records with a new value. The new value will be inserted in every record of your set. See the fields below for specific editing options and instructions.

This step is optional. If your records are already compliant with the Alliance Dublin Core Best Practices and you do not wish to globally edit your records, click the “CONTINUE” button, on the right side of the page, to move on to the next step in the contribution process.

Genre

To insert a Getty Art and Architecture Thesaurus (AAT) term in every record of your set, follow the steps below:

1. Select “I want to apply the same genre to all records in this set. I would like to apply:” and you will see a search box.

2. Type a genre value in the search box and click the “Search AAT” button to find a matching genre term in AAT. If potential matches are found, they will display as a list of terms below the search box, in a box labeled “Term”.

3. Click a term in the list, and its definition will appear below the “Term” box.
4. Click the blue icon (🔗) after the term, to review the term’s AAT authority record.

5. If this is the AAT record you want, return to your editing in the Harvester’s contribution form, and click the "Select" button to match your genre value with this AAT record.

A blue AAT URI will replace the search box when your value has been matched.

When you contribute this set, the genre URI’s label ("picture postcards" in this example) will replace all dc:type values in your set, with the exception of DCMI Type terms in dc:type. The DCMI Type terms in your set will be preserved.
**Format**

Globally editing format is available for CONTENTdm, Hydra, and Omeka contributors. To insert an Internet Media Type (IMT) in every record of your set, follow the steps below:

1. Select “I want to apply the same format to all records in this set. I would like to apply:” and you will see a drop-down menu of commonly used Internet Media Types.

   ![Format dropdown menu](image)

2. Select an Internet Media Type from the “Format” drop-down menu.

   When you contribute this set, the selected Internet Media Type will replace existing Internet Media Types in dc:format of every record in your set.

**Language**

To insert an ISO639-2 language code in every record of your set, follow the steps below:

1. Select “I want to apply the same language to all records in this set. I would like to apply;” and you will see a drop-down menu of language names.
2. Select a language name from the “Language” drop-down menu.

When you contribute this set, the selected language name’s ISO639-2 code will replace all existing dc:language values in your set.

**Rights**

Here you can choose to globally edit standardized rights statements, free-text rights statements, or both.

**Standardized rights statements**

To insert a standardized rights statement in every record of your set, follow the steps below:

1. Select “I want to apply the same rights statement(s) to all records in this set. I would like to apply:” and you will see a drop-down menu of RightsStatements.org and Creative Commons licenses. In the drop-down menu, RightsStatements.org statements are preceded by “RS” and Creative Commons licenses are preceded by “CC”.
2. Select a standardized rights statement from the “Standardized Rights Statements” drop-down menu.

When you contribute this set, the selected standardized rights statement will replace existing standardized rights statements in dc:rights of every record in the set. Free-text rights statements will be preserved.

Free-text rights statements

To insert a free-text rights statement in every record of your set, follow the steps below:

1. Select “I want to apply the same rights statement(s) to all records in this set. I would like to apply:” and you will see a “Free-text Rights Statement” text box.

2. Enter a free-text rights statement in the “Free-text Rights Statement” text box. Refer to the Alliance Rights Documentation for information about forming free-text rights statements.

When you contribute this set, the rights statement entered here will replace existing free-text rights statements in dc:rights of every record in the set. Standardized rights statements will be preserved.

Type

To insert a DCMI Type term in every record of your set, follow the steps below:

1. Select “I want to apply the same type to all records in this set. I would like to apply:” and you will see a drop-down menu of DCMI Type terms.
2. Choose a DCMI Type term from the “Type” drop-down menu.

When you contribute this set, the selected DCMI Type term will replace existing DCMI Type terms in `dc:type` for every record in your set. Values that the harvester does not recognize as DCMI Type terms will be preserved.

Continue

When you are finished editing, click the “CONTINUE” button, on the right side of the page, to move on to the next step in the contribution process.

Enriching genre (optional)

If you opted to enrich genre in your Setup Options, the harvester’s genre enrichment page will open with the title “Match genre values to the Getty Art & Architecture Thesaurus”. You will see your genre values listed on the page, similar to the screenshot below.

![Screenshot of the Getty Art & Architecture Thesaurus enrichment page.]
Notes about enriching genre

- If you just edited genre in the previous step, the AAT URI you chose there will override any genre enriching you do on this page.

- When you match a genre value to an AAT URI, the harvester assumes that you would like to match all future occurrences of this genre values to this AAT URI. The harvester will automatically apply these matches when you contribute future sets.

Matched genre values

If your genre values are listed with blue links, they automatically matched Getty Art & Architecture Thesaurus (AAT) terms. Click a blue link to view the matched AAT record. To dismiss a match, click the "x" icon to the right of the blue link.

![Glass plate negatives](http://vocab.getty.edu/aat/300393160)

Match genre values to AAT terms

If your genre values are listed with a search box, they do not match AAT terms and cannot be enriched as is.

To find a match and enrich a genre value, follow the steps below:

1. Type a variation of your genre value in the search box and click the “Search AAT” button. If potential matches are found, they will display as a list of terms below the search box, in a box labeled “Term”.

2. Click a term in the list, and its definition will appear below the “Term” box.
3. Click the blue icon (🔗) after the term, to review the term’s AAT authority record.

4. If this is the AAT record you want, return to your enriching in the Harvester and click the “Select” button to match your genre value with this AAT record.

A blue AAT URI will replace the search box when your value has been matched.

When you are finished enriching, click the “CONTINUE” button, on the right side of the page, to move on to the next step in the contribution process.
Enriching creators and contributors (optional)

If you opted to enrich creators and contributors in your Setup Options, the harvester’s creator and contributor enrichment page will open with the title “Match creator and contributor values to VIAF”. You will see your creator and contributor values listed on the page, similar to the screenshot below.

Note about enriching creators and contributors

- When you match a creator/contributor value to a VIAF URI, the harvester assumes that you would like to match all future occurrences of this creator/contributor values to this VIAF URI. The harvester will automatically apply these matches when you contribute future sets.
Matched creator/contributor values

If your creator and contributor values are listed with blue links, they automatically matched VIAF terms. Click a blue link to view the matched VIAF record. To dismiss a match, click the × to the right of the blue link.

![Otis W. Freeman](http://viaf.org/viaf/91487365)

Match creator/contributor values to VIAF URIs

If your creator/contributor values are listed with a search box, they do not match Library of Congress preferred labels in VIAF and cannot be enriched as is.

<table>
<thead>
<tr>
<th>Adkison, Kathleen Gemberling (1917-2010)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name Type:</td>
</tr>
<tr>
<td>Corporate</td>
</tr>
<tr>
<td>Search VIAF:</td>
</tr>
<tr>
<td>Search VIAF</td>
</tr>
</tbody>
</table>

To find a match and enrich a creator/contributor value:

1. Select whether the value is a "Personal" or "Corporate" name.

2. Type a variation of your creator/contributor value in the search box and click the “Search VIAF” button. If potential matches are found, they will display as a list of names below the search box, in a box labeled “Name”.

<table>
<thead>
<tr>
<th>Adkison, Kathleen Gemberling (1917-2010)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name Type:</td>
</tr>
<tr>
<td>Corporate</td>
</tr>
<tr>
<td>Search VIAF:</td>
</tr>
<tr>
<td>Search VIAF</td>
</tr>
</tbody>
</table>

3. Click a name in the list, and it will appear below the “Name” box.
4. Click the blue icon ( ) after the name, to review the name's VIAF authority record.

5. If this is the VIAF record you want, return to your enriching in the Harvester's contribution form, and click the "Select" button to match your creator/contributor value with the VIAF record.

A blue VIAF URI will replace the search box when your value has been matched.
When you are finished enriching, click the “CONTINUE” button, on the right side of the page, to move on to the next step in the contribution process.

Validation, missing data, and previewing records

The harvester will validate your records, checking for the presence of fields required by the Alliance Dublin Core Best Practices.

Missing data

If your records are missing data in required fields, you will see an Error page like the screenshot below:

An alert, near the top of the page, counts the number of records that are missing data in required fields. The first 20 records, with missing data, are listed on this page. For each of these 20 records, the field(s) with missing data are highlighted in red.
The set cannot be contributed as is because it is missing required data. Please go back and edit these records to be compliant with the Dublin Core Best Practices.

**Previewing records**

If your records are compliant and pass the Harvester’s validation, you will see the harvester’s preview page with a title suggesting that you “Preview your records and contribute this set”.

Here you can preview records destined for DPLA, Alliance Primo, or both. Your preview options will depend on the destination(s) you selected in the Setup Options. If you selected “DPLA and Primo” as the destination(s) for this set, you can use the drop-down menu shown below to choose between a preview of records for DPLA or for Primo:
Preview records for DPLA by selecting “Records for DPLA”, and your records will be listed on the page. Click a right-pointing triangle icon to open a record, displaying its metadata like in the screenshot below. In this preview, your metadata will be mapped to fields in dpla:SourceResource and edm:WebResource.

**Notes about previewing records for DPLA**

- Values in the following fields will preview as URIs. When you contribute your set, the harvester will store the URIs and their labels (the human-readable text). When your records display in DPLA, only the labels will be visible.
  - detrms:isPartOf
  - dc:hasType (if you edited or enriched genre in the harvester)
  - detrms:type
  - detrms:creator (if you enriched creators/contributors in the harvester)
  - detrms:contributor (if you enriched creators/contributors in the harvester)

- Your format value will display along with the URL for your reference image (the high resolution image).
- The harvester automatically applies the format value “image/jpeg” to accompany your thumbnail image. If you see a URL for your thumbnail image, you will also see this dcterms:format value.

- The harvester automatically applies your standardized rights statement to your reference and thumbnail images. If you see URLs for these images, you will also see this edm:rights value.

Alliance Primo

Select “Records for Primo”, and your records will be listed on the page. Click a right-pointing triangle to open a record, displaying its metadata like in the screenshot below. In this preview, your metadata will be mapped to Qualified (and locally qualified) Dublin Core fields.

Review your records to verify that your metadata looks as you expect. If you globally edited genre, format, language, rights, or type, check that the edits were successful. If you enriched creators and contributors or genre values, check that the applied URIs match your expectations.

Notes about previewing records for Alliance Primo

- Values in the following fields will preview as URIs. When you contribute your set, the harvester will store the URIs’ labels (the human-readable text) for Primo. When your records display in Primo, only the labels will be visible.
  - dcterms:isPartOf
  - dc:genre (if you edited or enriched genre in the harvester)
  - dc:creator (if you enriched creators/contributors in the harvester)
- dc:contributor (if you enriched creators/contributors in the harvester)

- The harvester automatically applies your ExLibris institution code in dc:publisher. This code will be transformed by Primo norm rules to display in Alliance Primo as your institution name.

**Contribute**

When you are finished previewing your records, click the “CONTRIBUTE” button, on the right side of the page, to initiate the harvest for this set.

![Contribute Button](image)

A dialog box, like the one in the screenshot below, will appear. Click the blue “Yes” button to proceed with your contribution.

![Dialog Box](image)

When the harvest is complete, you will see a page that thanks you for contributing your set.

![Thank You Page](image)
What happens next?

DPLA
If you chose to send your set to DPLA, please note that the Alliance is not yet a hub; objects will not appear in DPLA until the application process is complete and DPLA has ingested them.

Alliance Primo
If you chose to send your set to Alliance Primo, please note that this is not yet in production. Primo publishing is scheduled to run nightly, so your set should be viewable in the Primo sandbox tomorrow. The sets are being actively tested in order to write normalization rules and measure outcomes against objectives.

What can you do from here?
From this page you can:

- Click the “VIEW MY SETS” button to view all of your contributed sets.

  ![VIEW MY SETS](button)

- Click the “View this set for Primo” link to view these records for Primo.

  [View this set for Primo](#)

- Click the “View this set for DPLA” link to view these records for DPLA.

  [View this set for DPLA](#)

- Click the “Contribute another set” link to contribute another set.

  [Contribute another set](#)