

Content list creation and linking procedure

Approved by Collection Management Procedures Committee 29 November 2018



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Introduction

This procedure describes the process of how to create content list finding aids using the Drupal Content List interface for original and published resources, linked to catalogue records in Alma and Adlib.

Content lists are created and linked from catalogue records to enable more lengthy and detailed description not easily achieved within catalogue records and to provide more granular access to collections of resources. List content can be discovered in Google and other search engines which leads Readers to the Library catalogue. Additionally, content lists attached to catalogue records loaded to Libraries Australia are keyword indexed in Trove, increasing discoverability.

Preparing Excel spreadsheets for import to Drupal Content Lists¹

When sourcing spreadsheets which are superseded versions of Excel, or have been copied from various formats etc. often there can be “dirty data” present which will affect readability of content lists.

Example of dirty data

This accented apostrophe in the red box will export as seen in the second image.

Map no.	Title	Author
1	Sydney's Expansion	Drawn by Promo

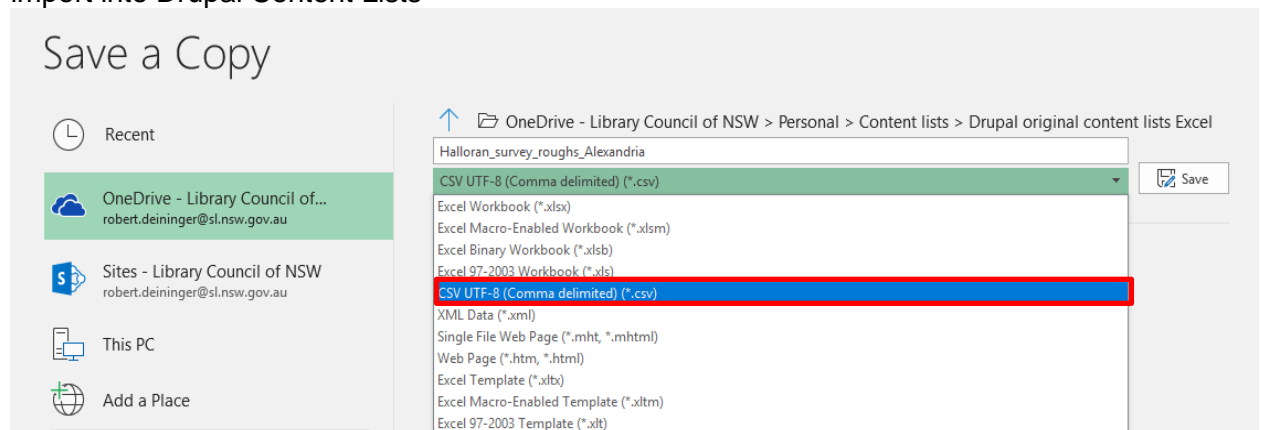
A	B	C
1	Sydney's Expansion	Author/Pi
2	Sydney's Expansion	Drawn by
3	Sydney's Expansion	R. R. Lewi

¹ Refer to Appendix A: Finding and cleaning dirty data in spreadsheets for set up instructions and how to add new characters to the find and replace macro

1. Open the contents list spreadsheet you want to upload to Drupal Content Lists.
2. Run your Find_and_Replace_macro (ALT+F8 to open macro list)
3. Highlight all cells in the spreadsheet which have data in them and run your Strange_Character_Highlight_macro
4. If any cells highlight as yellow inspect that cell, identify the new strange character and add it to the Find_and_Replace_macro (see Appendix A to add new characters to the Find and replace macro). If nothing turned yellow then skip to step 8
5. If you had to add a new character to the Find_and_Replace_macro close the spreadsheet without saving
6. Re-open the spreadsheet and run your updated Find_and_Replace_macro
7. Then select your range of cells and run the Strange_Character_Highlight_macro If cells still highlight as yellow repeat steps 4-6
8. If no highlights appear then save your spreadsheet as a .csv file then close the spreadsheet
9. Reopen spreadsheet and save as csv UTF 8

Creating Drupal Content Lists

Once the Excel spreadsheet has been prepared it is saved as a CSV UTF-8 file for import into Drupal Content Lists



Drupal Content Lists

Once logged in, From the Workbench select “Create content” which will display the “Create Tabular Lists” template

Workbench Manage robert.deininger

My Workbench **Create content** My edits All recent content

Create Tabular Lists

Title *

Body (Edit summary)

Tabular Data *

The first row will appear as the table header. Leave the first row blank if you do not need a header.

Add Row

CHANGE NUMBER OF ROWS/COLUMNS

IMPORT FROM CSV

CATALOGUE ITEM

URL

This must be an external URL such as <http://example.com>.

Link text

Save as: Draft

In the template complete the following fields:

- **Title:** Often this will be the title from the catalogue record
 - **URL:** This is the Permalink copied from the catalogue record in Primo
 - **Link text:** Usually this will be the title from the catalogue record
- NB:** The text is displayed as a link in the content list which will take the Reader back to the catalogue record in Primo

Title

Title *

Henry F. Halloran survey roughs, Paddington, 1871-1905

Where to find the Permalink in Primo

MAP

Henry F. Halloran survey roughs, Denison Ward, City of Sydney, 1884-1900.

Halloran, Henry Ferdinand, cartographer. : Henry F. Halloran & Co : [1884-1900]

Henry F. Halloran survey roughs, New South Wales.

Available at State Library of NSW Mitchell Map Collection (M ser 4 810/16/Halloran Survey Roughs/Denison Ward/Packets 11-Misc.) and other locations >

TOP

SEND TO

REQUEST IT

DETAILS

LINKS

TAGS

Send to

EXPORT BIBT EXPORT RIS REFWORKS ENDNOTE EASYBIB CITATION **PERMALINK** PRINT E-MAIL

https://primo-slnsw.hosted.exlibrisgroup.com/primo-explore/fulldisplay?docid=SLNSW_ALMA21199090070002626&context=L&vid=SLNSW&search_scope=EEA&tab=default_tab&lang=en-US

COPY THE PERMALINK TO CLIPBOARD

URL and Link text

CATALOGUE ITEM

URL

This must be an external URL such as *http://example.com*.

Link text *

Import CSV file

From “Import from CSV” link “Choose file” and select “Upload CSV”

▼ IMPORT FROM CSV

File upload

Halloran_surv...ison_ward.csv

Save Draft

The CSV will upload.

NB: Even though the blank template has 5 columns, it will adjust to how many columns are present in the uploaded file, e.g. 8 if the file has 8, or, 2 if the file has 2.


Save Draft and Preview

Current state: Draft

Change to:

Preview

Once saved the Content List will display as a “Preview”. Errors such as typos can be corrected after selecting the Edit tab.

 STATE LIBRARY NEW SOUTH WALES **CONTENT LISTS** [Catalogue](#) [Website](#)

Tabular Lists *Henry F. Halloran survey roughs, Gipps Ward, City of Sydney, 1840-1900* has been created.

[View](#) [Edit](#)

Henry F. Halloran survey roughs, Gipps Ward, City of Sydney, 1840-1900












Moderation state **Change to** **Log message**
Draft




Tabular Data
[Export Table Data](#)





No.	Extent	Client Name	Address or Location	Named estates within bundle	Notes	Date
Packet no. 1, Bundle no. 1	5 textual items	Edward Brown Solicitors	Princes St showing: Princes St, Kent St,			1847-1898
Packet no. 1, Bundle no. 2	4 maps, 4 textual items	Chipman	Margaret St showing: Margaret St, Margaret Lane, Wynyard Lane, George St, York St, Cumberland St, Gloucester St, Glebe St,			1883-1885


- Download a csv for preview using the “Export Table Data” link.
NB: If the data displays incorrectly it may need to be cleaned and re-uploaded.
- Copy and save the URL from the address bar. This will be the content list link input in the catalogue record.

[←](#) [→](#) [↺](#) [🏠](#) [https://content-lists.sl.nsw.gov.au/tabular-list/henry-f-halloran-survey-roughs-gipps-ward-city-sydney-1840-1900](#)

 Apps  Bookmarks  Alma  Primo  Cataloguing  Email  LA User Group  Maps  OPACS  Other stuff  Pando

 Workbench  Manage  robert.deininger

 My Workbench  Create content  My edits  All recent content

 STATE LIBRARY NEW SOUTH WALES **CONTENT LISTS**

[View](#) [Edit](#) [Revisions](#)

<https://content-lists.sl.nsw.gov.au/tabular-list/henry-f-halloran-survey-roughs-gipps-ward-city-sydney-1840-1900>

- Once previewed update version to “Needs Review” by selecting Apply.
NB: This will move the draft to the review screen for QA and publishing

[View](#) [Edit](#)

Henry F. Halloran survey roughs, Gordon, 1831-1914

Moderation state **Change to** **Log message**
Draft

- Email DQSS for quality assurance and publishing.

Linking content lists to catalogue records in Alma and Libraries Australia

Linking content lists to catalogue records in Alma

- Once the content list has been published add the URL to the catalogue record as an 856 field coded as the following example

856 42 \$\$u https://content-lists.sl.nsw.gov.au/tabular-list/henry-f-halloran-survey-roughs-gipps-ward-city-sydney-1840-1900 \$\$z List of maps in this collection \$\$x searchable resource

MARC field and indicators

856 42

856 = Electronic Location and Access ; 4 = HTTP ; 2 = Related resource

MARC subfields

\$\$u = Uniform Resource Identifier (This is the URL created and copied from Drupal Content Lists when the list is saved)

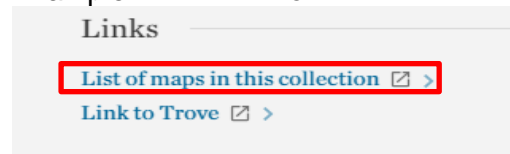
\$\$z A meaningful phrase that the Reader will see as a link in Primo,

E.g. List of maps in this collection, or, List of pamphlets in this collection

\$\$x searchable resource = This subfield triggers keyword indexing of content in Trove

NB: Although this subfield isn't required in Alma it is good practice to have the same data in both the Alma and Libraries Australia records

Example Link in Primo



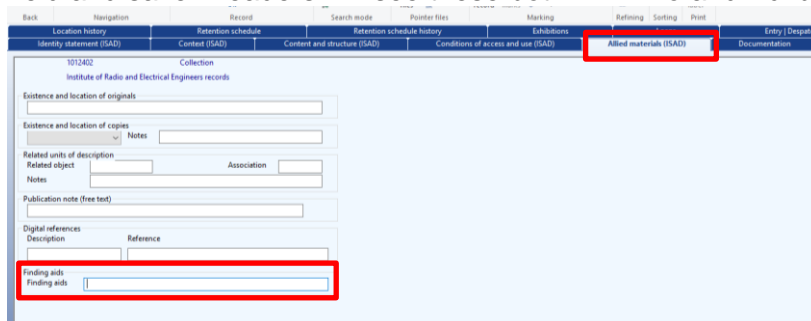
Linking content lists to catalogue records in Libraries Australia

- In the Libraries Australia record paste and save the entire 856 field, using one \$ delimiter per subfield. See the following example

856 42\$uhttps://content-lists.sl.nsw.gov.au/tabular-list/henry-f-halloran-survey-roughs-gipps-ward-city-sydney-1840-1900\$zList of maps in this collection\$x searchable resource

Linking content lists to catalogue records in Adlib

- Once the content list has been published add the URL to the catalogue record
- In the target record, Allied materials (ISAD) tab, select edit to input a meaningful phrase and the URL, separated by a dash, into the Finding aids field and save. Readers will see these both in Primo and Adlib UI



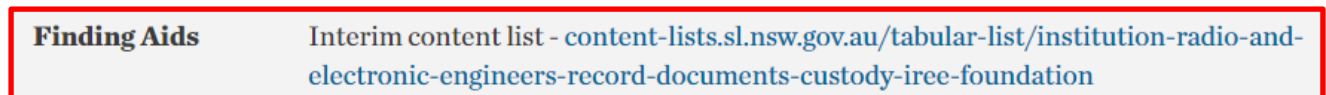
Example of text and URL to be input

Interim content list - <https://content-lists.sl.nsw.gov.au/tabular-list/institution-radio-and-electronic-engineers-record-documents-custody-iree-foundation>

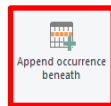
Completed finding aids link



Example Finding Aids link in Primo



NB: If multiple Findings Aids are to be input, from the Edit tab select



Append occurrence beneath and complete as above

Robert Deininger
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20 November 2018

Appendix A – Setting up your Find_and_Replace_macro and your Strange_Character_Highlight_macro

Setting up your macros and saving them to your PERSONAL.XLSB workbook will enable you to reuse the macros on any spreadsheet using only a couple of hotkeys each time. If you will be cleaning many spreadsheets of 'dirty data' then this will end up saving you a lot of time.

1. Open Excel from your desktop (do not use the online version of Excel!)
2. Click on **File** → **Options** → Then select the **Customise ribbon** option in the left panel
3. This will list the potential tabs you can display in your Excel ribbon. Ensure that the **Developer** option is selected
4. Once you've selected the **Developer** option click **OK** to exit options. You will now see a **Developer** tab in the Excel ribbon
5. Select the **Developer** tab then select **Record Macro**
6. You will then be presented with a pop-up box
7. Name the macro **Find_and_Replace_macro** and ensure it's stored in **Personal Macro Workbook**
8. Select **OK**. Then enter the letter 'a' into cell A1, then click **Stop recording** on the ribbon
9. Now select your **View** tab in the Excel ribbon then click on **Unhide**. Ensure **PERSONAL.XLSB** is selected
10. Once you hit **OK** your personal workbook will open. You can double check this by looking at the name of the workbook which is currently open
11. Now that you have your personal workbook open you can modify the code of the macro. Hit the keys **ALT+F8**. This will open your macro menu
12. Ensure that **All Open Workbooks** is selected at the bottom of the pop-up, then select the **Find_and_Replace_macro** in the list, then select **Edit**
13. You will be taken to the Visual Basic editing interface which is where we can modify macros. While in this new window select all **CTRL+A** on the contents of the white area and then Copy paste the text in bold/green below over everything

```
Sub Find_and_Replace_macro()  
Find_and_Replace_macro Macro  
  
Cells.Replace What:="", Replacement:="", LookAt:=xlPart, SearchOrder_  
:=xlByRows, MatchCase:=False, SearchFormat:=False, ReplaceFormat:=False  
Cells.Replace What=" ", Replacement=" ", LookAt:=xlPart, SearchOrder_  
:=xlByRows, MatchCase:=False, SearchFormat:=False, ReplaceFormat:=False  
End Sub
```

14. Hit **CTRL+S** to save the macro once you've overwritten the code
15. Hit **ALT+Q** to quit out of the Visual Basic editor. This will return you to looking at your PERSONAL.XLSB workbook
16. Hit **CTRL+S** again to save your personal workbook
17. Now we're going to add the **Strange_Character_Highlight_macro**
18. Click on the **Developer** tab then select **Record Macro**
19. You will then be presented with a pop-up box
20. Name the macro **Strange_Character_Highlight_macro** and ensure it's saving to **Personal Macro Workbook**

21. Select **OK**. Then enter the letter 'a' into cell A1 then click **Stop recording** on the ribbon
22. Hit the keys **ALT+F8**. This will open your macro menu
23. Ensure that **All Open Workbooks** is selected at the bottom of the pop up then select the **Strange_Character_Highlight_macro** in the list then select **Edit**
24. You will once again be taken to the Visual Basic editing interface which is where we can modify macros. While in this new screen select all **CTRL+A** on the contents of the white area there and then Copy paste the text in bold/green below over everything

```

Sub Strange_Character_Highlight_macro ()
Dim Cell As Range
Dim N As Integer

For Each Cell In Selection
    For N = 1 To Len(Cell)
        If Asc(Mid(Cell, N, 1)) >= 128 Then
            Cell.Interior.ColorIndex = 6
        Exit For
    End If
Next N
Next Cell
End Sub

```

25. Once you've confirmed that the code looks the same as above then hit **CTRL+S** to save it
26. Then hit **ALT+Q** to close the Visual Basic editor
27. Now that you're back on your PERSONAL.XLSB workbook hit **CTRL+S** again to ensure the macro was saved
28. Next select the **View** tab on the Excel ribbon then select **Hide**
29. Now you will be left with a blank Excel workbook. Close this workbook and a pop-up will appear with the warning. Hit **Save**
30. Your two macros will now be available to use on any spreadsheet you open while using that computer

Adding new strange characters to your existing

Find_and_Replace_macro

Once you have your two macros set up and begin to use them you may start to find new strange characters in the spreadsheets you're working on. To add them to your Find_and_Replace_macro follow these steps.

1. Open Excel from your desktop and select the **View** tab → select **Unhide** → Choose **PERSONAL.XLSB** from the pop-up menu and click **OK**
2. Hit **ALT+F8** to open your list of macros → Select your **Find_and_Replace_macro** → Select **Edit**
3. This will open the Visual Basic editing screen and display the code for your macro
4. Copy the section of the macro highlighted in blue as seen in the next images and then paste it below the copied text

```

Sub Find_and_Replace_macro()
' Find_and_Replace_macro Macro
'
Cells.Replace What:="", Replacement:="", LookAt:=xlPart, SearchOrder _
:=xlByRows, MatchCase:=False, SearchFormat:=False, ReplaceFormat:=False
Cells.Replace What:" ", Replacement:=" ", LookAt:=xlPart, SearchOrder _
:=xlByRows, MatchCase:=False, SearchFormat:=False, ReplaceFormat:=False
End Sub

```

Becomes

```

Sub Find_and_Replace_macro()
' Find_and_Replace_macro Macro
'
Cells.Replace What:="", Replacement:="", LookAt:=xlPart, SearchOrder _
:=xlByRows, MatchCase:=False, SearchFormat:=False, ReplaceFormat:=False
Cells.Replace What:" ", Replacement:=" ", LookAt:=xlPart, SearchOrder _
:=xlByRows, MatchCase:=False, SearchFormat:=False, ReplaceFormat:=False
Cells.Replace What:"Á", Replacement:="A", LookAt:=xlPart, SearchOrder _
:=xlByRows, MatchCase:=False, SearchFormat:=False, ReplaceFormat:=False
End Sub

```

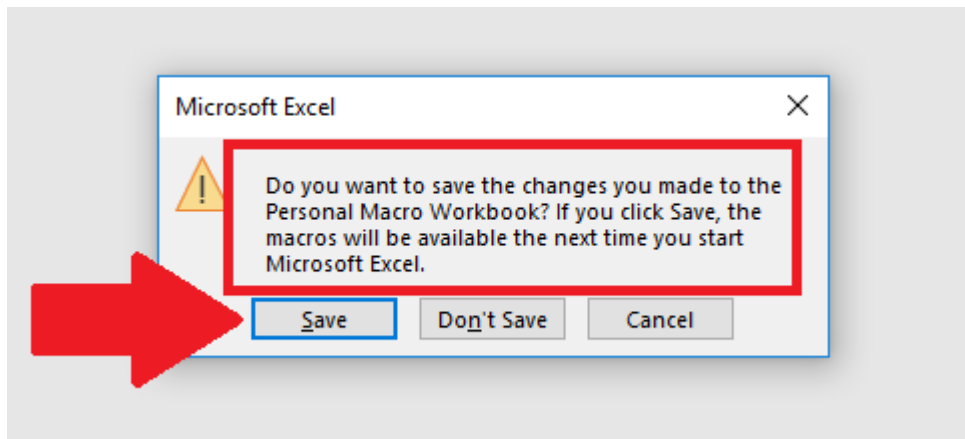
5. Now you need to input the new strange character into the code. In the previous picture you can see there is a single space selected indicated by the red arrow. This is where you paste in the new strange character you've found. Be sure to delete the data already between the quotation marks first!
6. For this example, we will pretend we've found the diacritic letter Á throughout the spreadsheet we're working on. We want to convert all of these to a normal capital A.
7. Enter the Á character in the red arrow position
8. Enter the A replacement character in the blue arrow position. Remember to delete the existing character/space between the quotation marks first! It should end up looking like the following image

```

:=xlByRows, MatchCase:=False, SearchFormat:=False, ReplaceFormat:=False
Cells.Replace What:"Á", Replacement:"A", LookAt:=xlPart, SearchOrder _
:=xlByRows, MatchCase:=False, SearchFormat:=False, ReplaceFormat:=False
End Sub

```

9. Hit **CTRL+S** to save the macro then hit **ALT+Q** to close the Visual basic editor.
10. Ensure you have the PERSONAL.XLSB workbook open then select the **View** tab in the ribbon → select **Hide**
11. Now will be left with a blank Excel workbook. Close this workbook and a pop-up will appear with the warning seen in the red box below. Hit **Save**.



12. You have now updated your Find_and_Replace_macro

Appendix B : Content list workflow

