Curator's Workbench Basic User Guide

The Curator's Workbench is a tool to aid in the accession, arrangement, description and staging of digital objects. The tool is an open-source desktop tool that you can download from the internet and run on your desktop machine.

The tool helps archivists manage files before they are stored in a repository or dark archive. Once the files are selected, arranged, and described, a METS file is generated by the software that documents these processes. In addition, checksums UUIDs are generated for each objects and MODS descriptive metadata elements are mapped to individual objects.

Downloading the software

You can download a .zip file of the software for Windows, Mac or Linux machines here, http://www.lib.unc.edu/software/. The tool is still in beta stages, so there will be new updates to the software on a weekly or bi-weekly basis.

Once the software has been downloaded and unzipped on your machine, there should be an icon that says "workbench" – you can click on the icon and launch the software.

How to get started

Setting a staging area

First, you need to decide where your project files will be staged. Local staging (staging files to your desktop) is currently the default. You could customize the staging locations by configuring different server locations into the preferences section. This would probably be something a technical staff person would need to do. Staging areas are important if you want the materials to be staged in a "dark archive" or other space that is off a local machine and backed up regularly. Go to Project > Preferences, to set the staging location.

Starting a project

Each SIP or group of objects you manage in the Workbench is called a "Project". You can work on numerous projects at once. To create a project,

1. Go to the Project menu and select "Create Project".
2. Enter a project name and press "Finish".

Your project is divided up into three sections:

Original Folders – Displays the original data you are collecting. These folders can be any folder on the local computer, a network drive or an iRODS collection.

Arrangement - Shows a display containing any objects you have captured from the original folders. In this area you may rename, rearrange, describe and remove

objects in your submission.

Crosswalks - Holds the crosswalks to MODS metadata elements defined in your project. Crosswalks allow you to define mappings between tabular metadata records and MODS records for your projects.

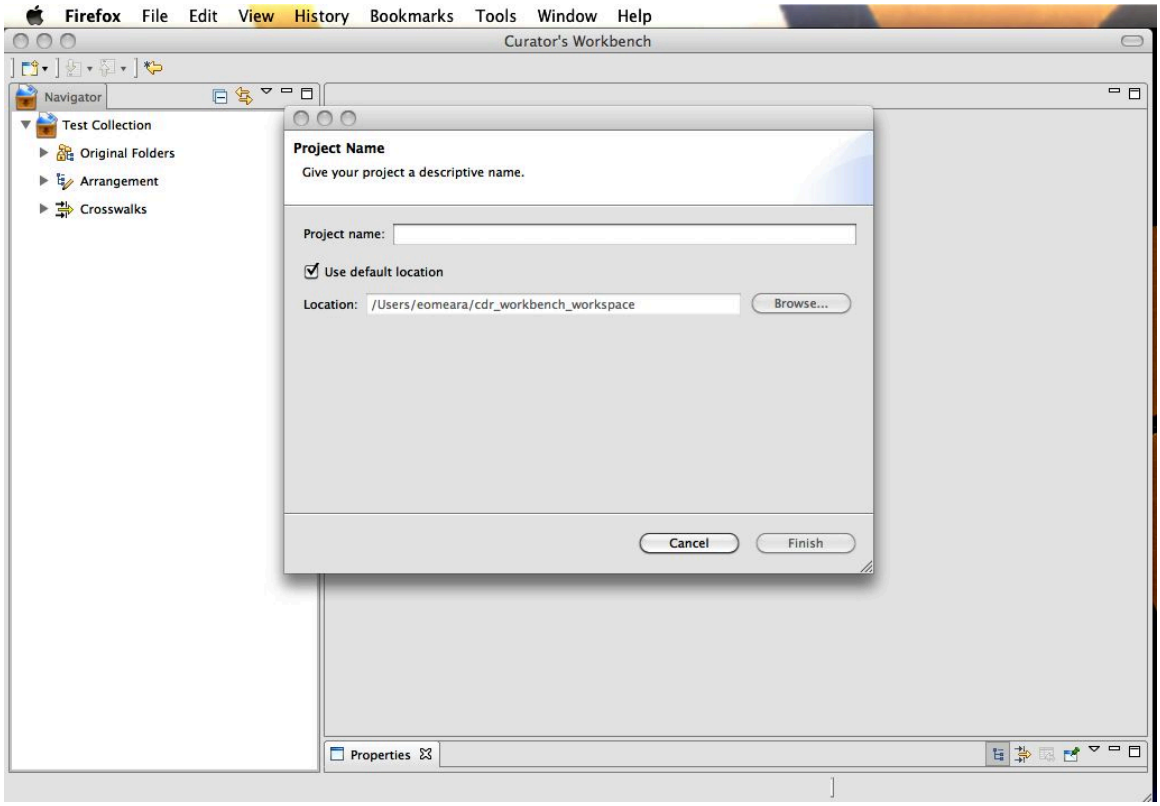

Figure 1. Creating a project and giving it a project name. *Note*: three sections of the project indicated in the left-hand sidebar.

Adding folders to a project

After you have created a project and are ready to add files, you will be "linking to original folders" (see Figure 2). When you link to folders, they are not imported or moved into the software. We'll get to that later.

1. Using the navigation view on the left, right-click (or alt-click on Mac) on the project name or on the "Original Folders" section.
2. From the context menu, choose "Link to Original Folders".
3. Choose the file system type, either a "Local Folder" or an "iRODS Collection". In most cases you will choose a local folder.
4. Press the "Select" button and browse to the folder that you want.
5. When you have found your folder and pressed "Okay", you will find that the folder is now linked within the "Original Folders" section.

In the Original Folders section you can safely explore the collected files without

worrying about inadvertently modifying them through an accidental drag and drop or delete action. Hidden files are also shown.

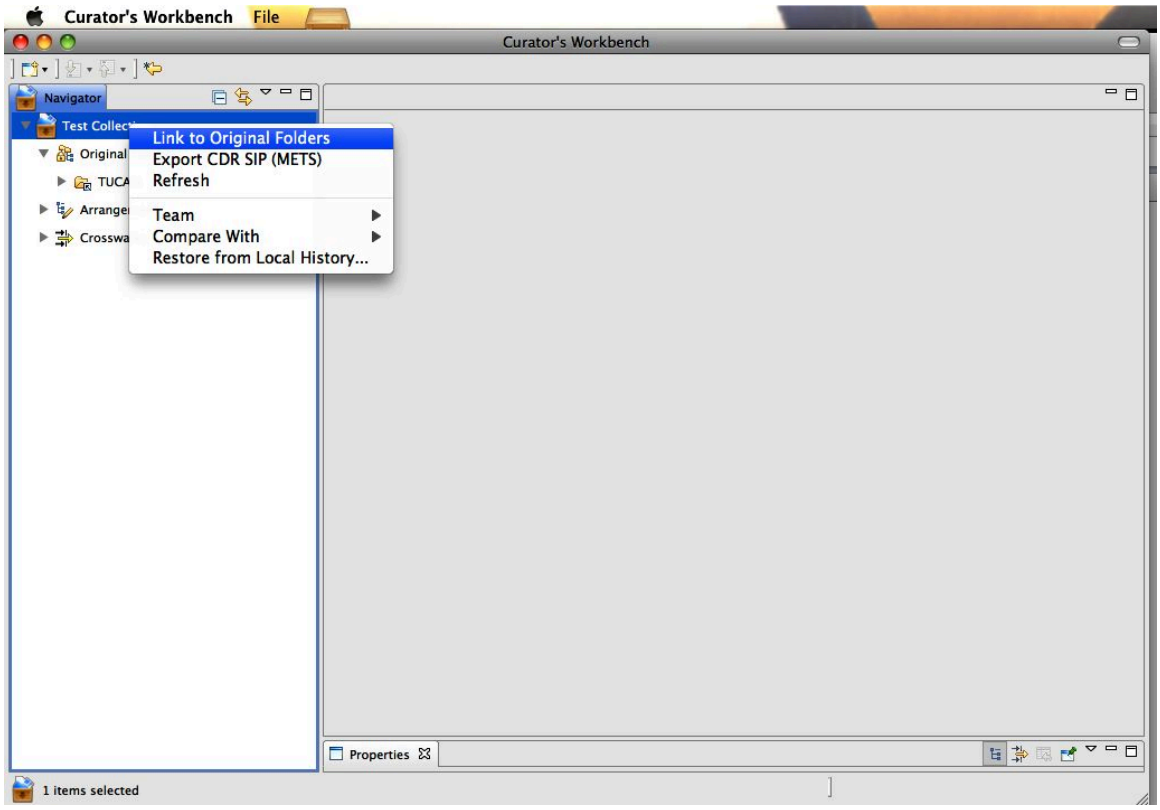

Figure 2. Linking to original folders on a drive.

Capturing Files

Capturing files brings files into a staging space (see Figure 3). This is where you will be bringing those linked files into dedicated space.

To capture files and folders:
1. Select one or many files in the Original Folders section. (SHIFT, CTRL or OPTION can assist you in creating your selection.)
2. Right-click on a selected file to bring up the context menu and choose "Capture".
3. The file and all of its un-captured parent folders (up to the linked original) will be added to the Arrangement section.
NOTE: If a folder was previously captured and subsequently renamed or moved, the newly captured children will still appear in the rearranged folder.

During capture, the workbench automatically generates a checksum and stages the file to your preferred staging location. A progress bar will appear to show progress since it can take some time to move files from one server to another.

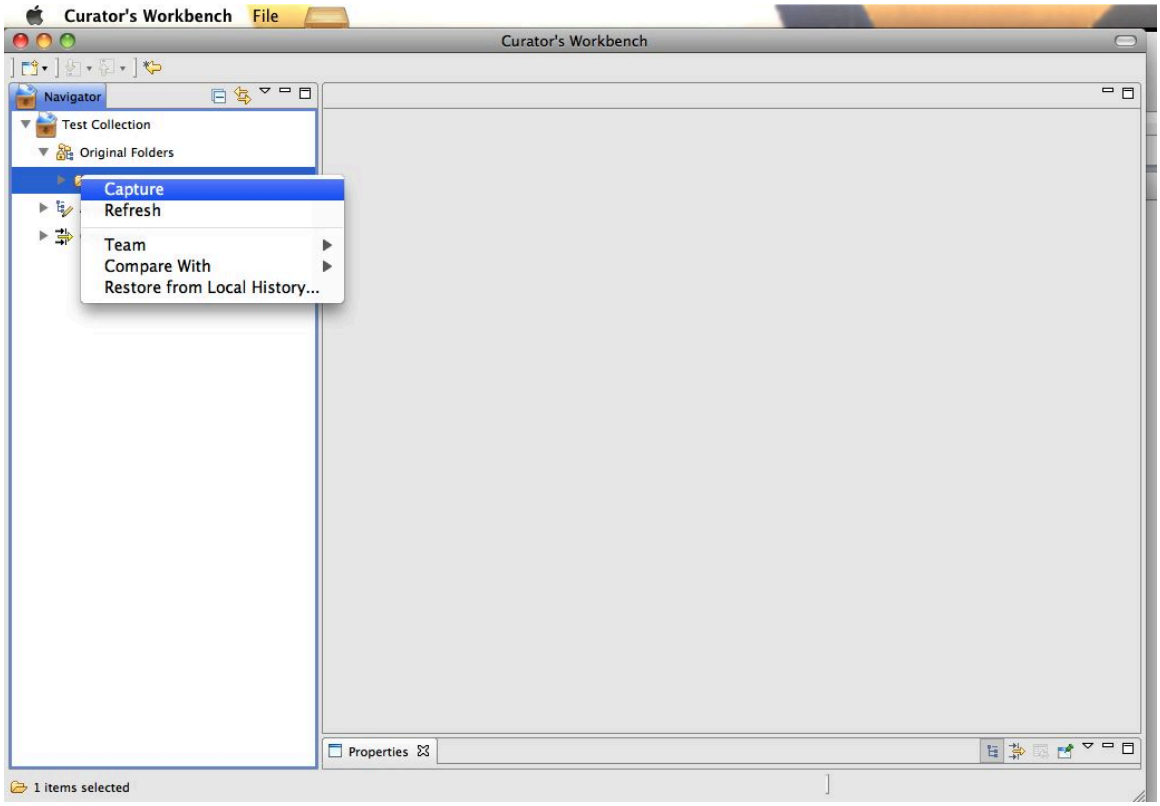

Figure 3. Capturing linked folders onto staging space.

Create or Edit a Description

Any item or folder in the arrangement section can be described with a MODS record. To create a MODS description for an item, just double-click on it or right-click and select "Edit MODS description". The MODS Editor will open.

Crosswalk Tab-Delimited Metadata to MODS

The Workbench is designed to facilitate the staging of large batches of objects with custom supplied metadata. The crosswalk tool is the key to mapping user-supplied metadata fields to MODS elements. It allows you to define how each MODS record is created, which elements are used and where they come from in the source metadata.

1. To start you must have your supplied metadata in tab-delimited format. This means that each record will be on a separate line in a text file. The fields in each record will be in a consistent order and separated by the TAB character.
2. Your tab-delimited file must be linked in the linked folders section you did a few steps back. You can either link to the parent folder of your tab file or drop your tab file into an original folder this is already linked.
3. Find your tab-delimited file in the Original Folder tree and right-click.
4. In the context menu, select "Crosswalk Batch Metadata".
5. The Crosswalk Wizard will open. You may leave the default settings and click "Finish" to continue.

6. Now the Crosswalk Editor will open, showing you the canvas on which you will map metadata.

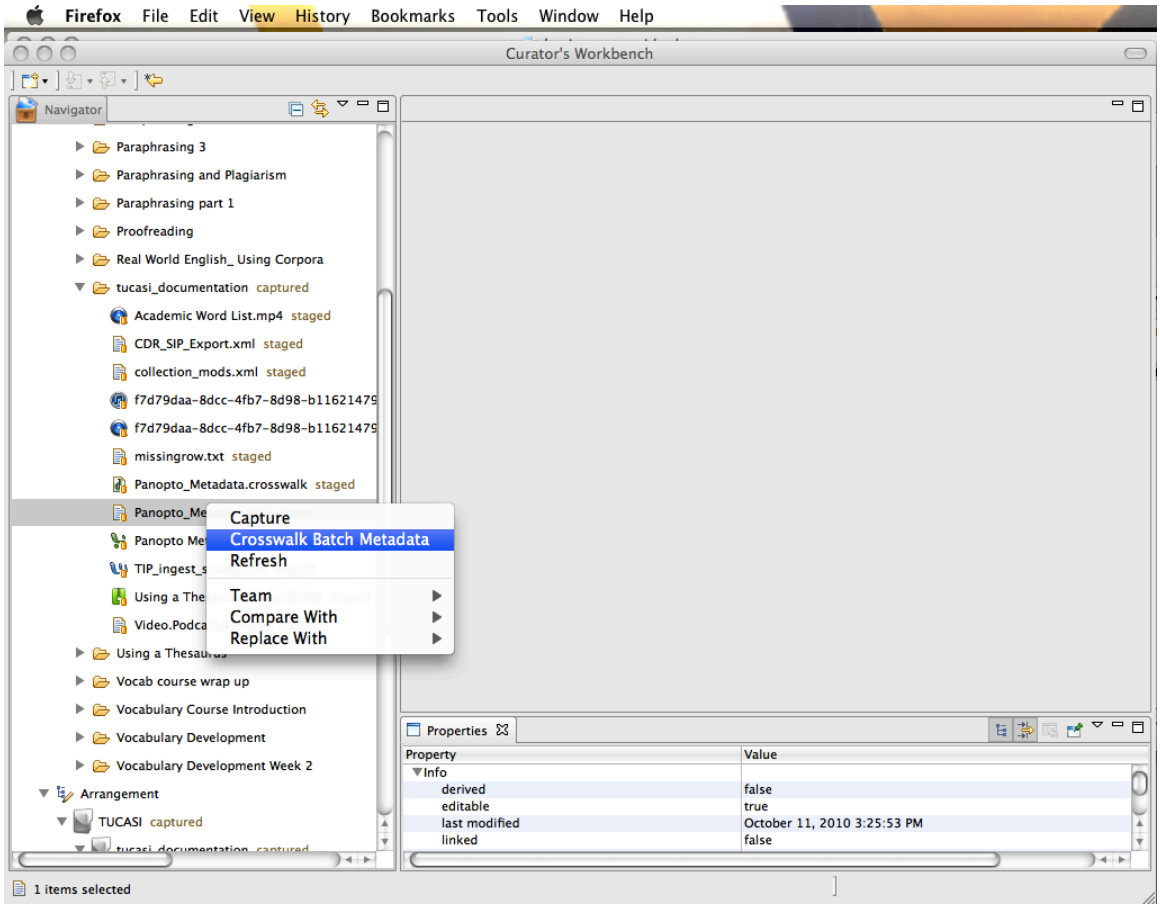

Figure 4. Linking to tab-delimited metadata file

To crosswalk MODS elements to your tab-delimited metadata you will double-click on the "MODS Element" tab in the right tab. Click the MODS element (e.g. TitleInfo or Name) and drag it to the middle space.

To connect the MODS element to an element in your crosswalk file, click on "Input Connector" in the right tab, drag it from MODS element (e.g. title, topic, input) and drag it to the corresponding column on the left in the crosswalk file.
NOTE: the arrow on your cursor will prompt you where you need to click. If there is a circle with a cross through it, you cannot add an input connector there. Once the circle with a cross through it disappears, you can click and connect the MODS element. The same thing will happen to direct you where to click on metadata crosswalk file on the left.

The key element that needs to be linked is the File/Folder Name Matcher. This field matches up the file names in the metadata file to the actual objects. Make sure to match this element to the proper metadata field in the crosswalk file.

Once the connectors are linked, there will be a green line between the MODS element and the crosswalked metadata. Link as many files as you like. When you close the crosswalk file, it will prompt you to save the file. Save it and it will be a part of the METS file that the Workbench is generating.

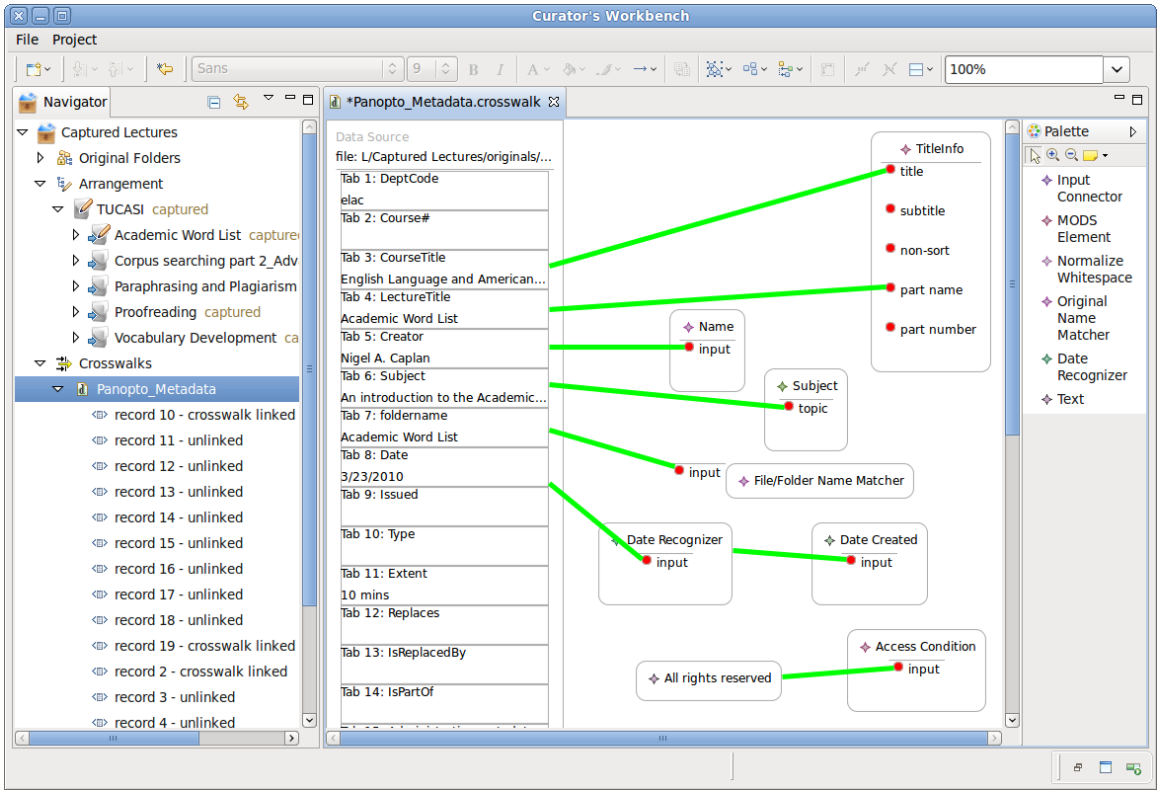

Figure 5. Linking MODS elements to tab-delimited metadata elements

Wrapping up

When you are done staging the files and mapping metadata (if you have any), the system will have built out a robust METS file (see Figure 6) that contains the arrangement, location, UUID, checksums and MODS records for all the files you staged.

If you are not using the METS file as a manifest for ingest into a repository, you can use this METS file as a wrapper that documents relationships between files and metadata (both descriptive and technical). The wrapper can help provide a level of documentary control over collections if they are residing in a “dark archive” or some other secure server space.

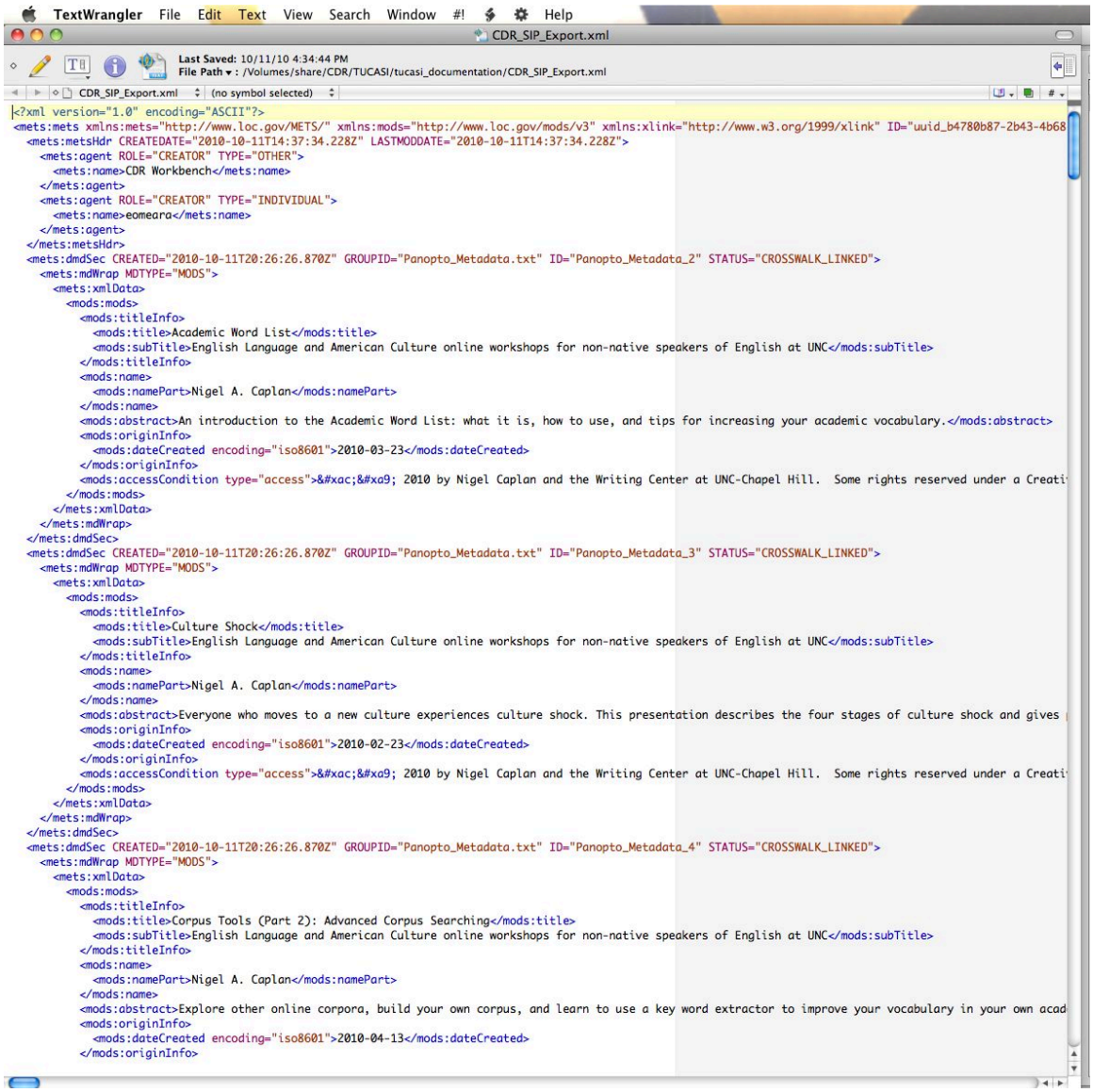

Figure 6. Example METS output from Workbench