OHMS (Oral History Metadata Synchronizer)
USER GUIDE

1.0 OVERVIEW

2.0 OHMS APPLICATION: OVERVIEW

3.0 INTERVIEW MANAGER

4.0 METADATA EDITOR
- 4.1 METADATA FIELDS (INTERVIEW-LEVEL)
- 4.2 MEDIA HOST / MEDIA CONNECTION
- 4.3 IMPORTING METADATA
- 4.4 IMPORTING AN OHMS XML FILE
- 4.5 BI-LINGUAL INDEXING AND SYNCHRONIZATION
- 4.6 METADATA EDITOR: IMPORTANT NOTES

5.0 INDEXING MODULE
- 5.1 INDEXING CONTROLS AND WORKFLOW
- 5.2 INDEX MODULE METADATA FIELDS
- 5.3 USING A THESAURUS IN THE INDEX MODULE
- 5.4 THESAURUS ASSIGNMENTS
- 5.5 BI-LINGUAL INDEXING
- 5.6 NOTES ABOUT INDEXING

6.0 THESAURUS MANAGER
- 6.1 UPLOADING A THESAURUS

7.0 TRANSCRIPT SYNC MODULE
- 7.1 UPLOADING A TRANSCRIPT
- 7.2 INITIATING TRANSCRIPT SYNCHRONIZATION
- 7.3 SYNCHRONIZING A TRANSCRIPT
- 7.4 MAKING MINOR EDITS DURING TRANSCRIPT SYNC
- 7.5 TRANSCRIPT SYNC: HINTS AND REMINDERS
- 7.6 LINKABLE FOOTNOTES IN THE TEXT
- 7.7 SYNCHRONIZING A TRANSCRIPT AND A TRANSLATION

8.0 THE INTERVIEW MANAGER “NOTES” FEATURE

9.0 WORKFLOW MANAGEMENT

10.0 THE PREVIEW VIEWER

11.0 EXPORTING THE OHMS XML FILE
    11.1 EXPORTING A CSV VERSION OF YOUR DATA

12.0 THE OHMS VIEWER
    12.1 INSTALLING THE OHMS VIEWER
    12.2 CONFIGURING THE OHMS VIEWER
    12.3 CONSTRUCTING LINKS TO THE OHMS XML FILE
    12.4 UPGRADING THE OHMS VIEWER

13.0 REMINDERS/KNOWN LIMITATIONS

1.0 OVERVIEW

OHMS is a system designed to enhance access to online oral histories (or other time-based media) in an efficient and affordable fashion. The primary purpose of OHMS is to create a framework, space, and user interface to enhance search and discovery of information in online audio and video sources by connecting textual searches of a synchronized transcript or of an index, to the corresponding moments. OHMS was designed to create an interoperable and sustainable framework using simple and open formats and technologies. There are two main components of the OHMS system:

OHMS Application: The OHMS Application is the online space where the preparation of resources is completed. This is the back-end, web-based application where metadata is imported or created, transcripts (and translations) are uploaded and synchronized, or descriptive indexes are created. Upon completion, the item record, (which includes the synchronized transcript and/or time-coded index), is exported as a simple XML file. When this XML file is located on a web server, it interfaces with the content management system by way of the OHMS Viewer. The Louie B. Nunn Center for Oral History currently hosts the central installation of the OHMS application. Accounts are free.

OHMS Viewer: The viewer is downloaded and installed in a server environment, and is where the public interacts with a resource prepared using the OHMS Application. When a user clicks on the appropriate link, the OHMS viewer loads. The viewer combines select interview-level metadata, intra interview-level metadata with the audio or video player. The OHMS viewer currently utilizes jPlayer (HTML5) for directly delivering the audio/video (http://jplayer.org/), OHMS is also designed to work with Kaltura, Brightcove, YouTube and SoundCloud streaming services.

OHMS Viewer Examples:

OHMS Viewer: synchronized transcript

OHMS Viewer: interview index

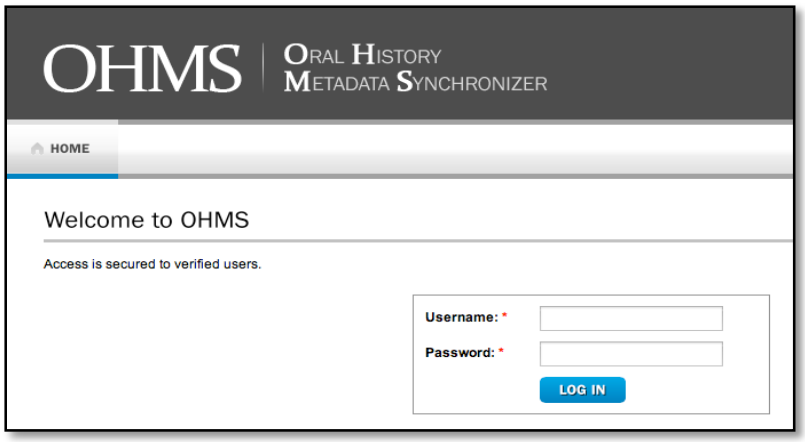
OHMS Viewer: synchronized transcript + interview index

OHMS Viewer: bilingual index

OHMS Viewer: transcript + translation

2.0 OHMS APPLICATION: OVERVIEW

The OHMS application is a user-authenticated web application. The OHMS "Repository" is the dedicated space created for processing a specific group of resources and is originally established by a "Repository Administrator." Once the "Repository" is established, the repository administrator(s) can add additional users associated with that repository. All accounts associated with a repository will only see materials associated with that repository when logged in using individually assigned usernames and passwords. Once an individual account is created, log into OHMS using the assigned username and password. When first logging in to an account, users will be asked to change the temporary password and accept a terms of service agreement.



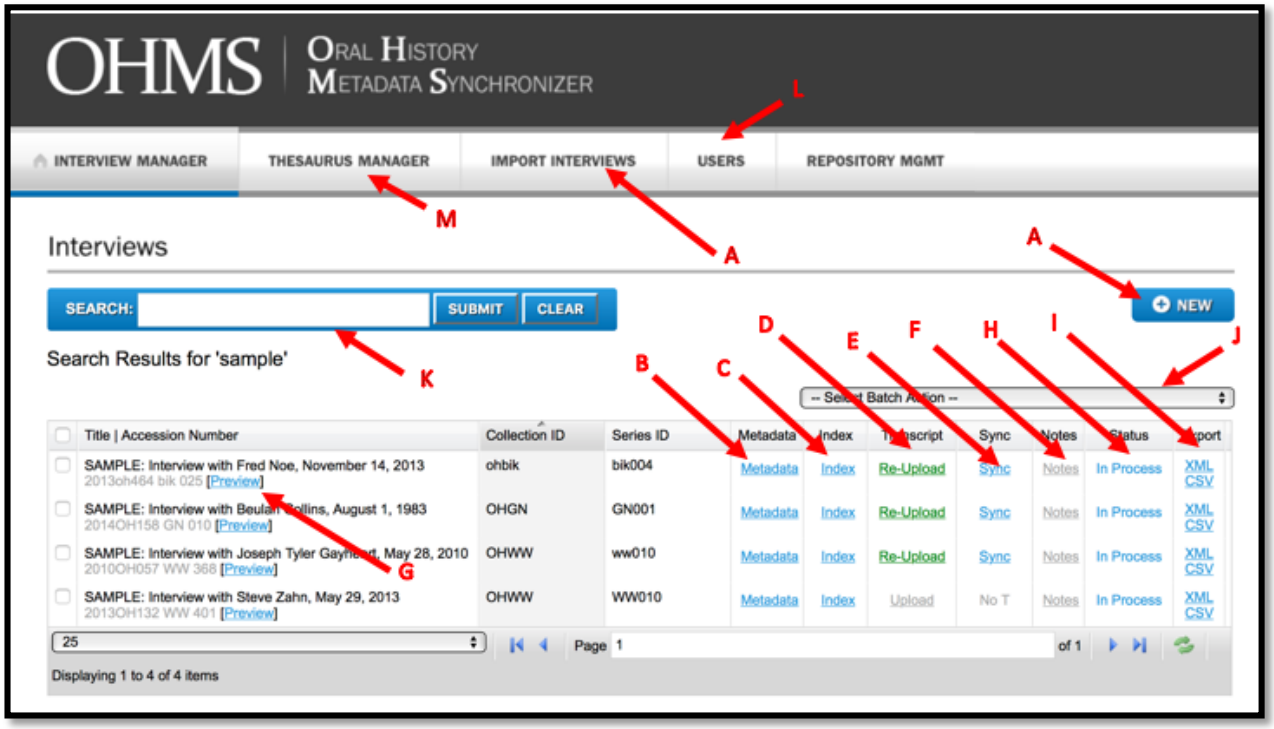
Once logged into the OHMS application, assigned users can begin to prepare oral history interview and other audio or video resources for public access. The following represent the major components of the OHMS application:

- **Interview Manager:** Central area to initiate an item or an interview. Provides navigation to major functional areas of OHMS and the monitoring of workflow.
- **Metadata Manager:** Input or edit collection or item-level metadata.
- **Indexing Module:** Index/annotate an audio or video resource.
- **Transcript Synchronization Module:** Place timecode into a transcript at corresponding locations.
- **Thesaurus Manager:** Manage controlled vocabularies used while indexing.
- **Interview Import:** Import item-level metadata to begin indexing and/or transcript synchronization.
- **User Management:** Assign rights and permissions for users assigned to the OHMS repository.

3.0 INTERVIEW MANAGER

The Interview Manager is the main hub of the OHMS application. The Interview Manager is where you:

A. Create or Import new interview records
B. Update or edit item-level metadata
C. Initiate the indexing module
D. Upload transcripts
E. Initiate transcript synchronization
F. Create a note
G. Preview completed interviews
H. Workflow management
I. Export the final XML or CSV file for an interview
J. Batch export or delete records
K. Search repository (this searches title, accession #, collection and series ID)
L. Add users to repository
M. Manage thesauri used for indexing



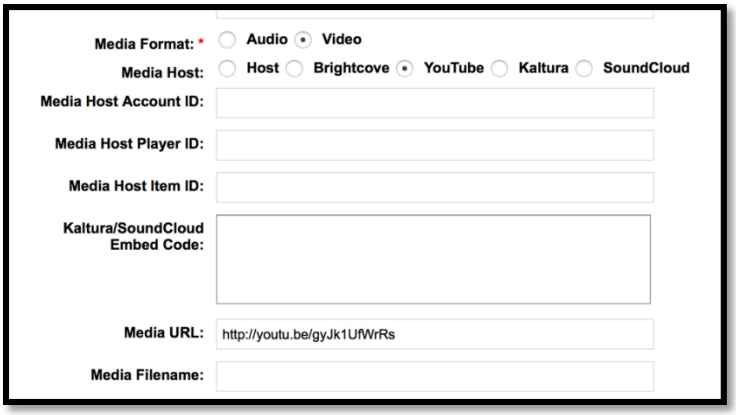
4.0 METADATA EDITOR

Item-level metadata can either be created in OHMS or imported and, therefore, retain metadata associated with the item throughout the OHMS process. OHMS utilizes metadata fields commonly associated with oral history.

The "Metadata" link for an item is a navigational link to the metadata record for that item. This space is where required information for initiating activities in OHMS is entered.

In order to initiate work with an item in the OHMS application, *four* metadata elements must be completed:

- **Title**
- **Media format** (audio or video)
- **Media host**
- **Media connection** (depending on your connection type and media host)
    - Media URL (for directly linking to an audio or video file)
    - Media Host ID Information (use for specific streaming solutions: Brightcove)
    - iFrame Embed code (use for specific streaming solutions: Kaltura, SoundCloud)



Once these four elements are successfully established in OHMS, an item can be indexed, or a transcript can be synchronized (as soon as the transcript is uploaded).

Note: Not all of the fields utilized in the item-level metadata records will be visible in the OHMS Viewer (such as interview-level subjects and keywords). However, all of the interview-level fields remain associated with the resource in the XML document rendered by the OHMS Viewer. If needed, all of the metadata fields present in the Metadata Module and subsequent XML file can be harvested for future integration into the CMS.

4.1 METADATA FIELDS (INTERVIEW-LEVEL)

The following is a list of interview-level metadata fields that are utilized by the OHMS application. Many of these elements are utilized by the OHMS Viewer, however, many elements in this set are not utilized by the OHMS Viewer:

- **Title**
- **Accession Number**
- **Interviewee** (First Last)
- **Interviewer** (First Last)
- **Interview Date** (YYYY-MM-DD)
- **Date (Non-preferred format)** - This is utilized for partial dates (Instead of the previous field)
- **Collection ID**
- **Collection Title**
- **Collection Link** (hyperlink)
- **Series ID**
- **Series Title**
- **Series Link** (hyperlink)
- **Summary**
- **Keywords**
- **Subjects**
- **Duration**
- **Media Format** (audio or video)
- **Media Host** (Choices vary by selection. See section 4.2 for more information.)
    - **Host** (directly linking to audio or video file)
        - Media URL (must be direct link to the audio or video file.
    - **YouTube**
        - Media URL generated by the YouTube “share” function.
    - **Kaltura**
        - Requires iFrame embed code
    - **SoundCloud**
        - Requires iFrame embed code
    - **Brightcove**: Requires the following
        - Media Host Account ID
        - Media Host Player ID
        - Media Host Clip ID
- **Media Filename**
- **Alt Sync URL** – [Legacy] This field was originally utilized when OHMS was only able to synchronize transcripts with audio, and could not synchronize video. This field was

used to synchronize the audio exported from a video interview in order to synchronize. OHMS can now natively synchronize transcripts with video and, therefore, this field is no longer necessary for current OHMS functionality, however, it is being retained for backward compatibility.

- **Usage Statement**
- **Rights Statement**
- **Funding**
- **Format**
- **Language –** This field is required if indexing or synchronizing 2 languages
- **Include Translation –** This checkbox activates the capability for an interview to be indexed in 2 languages, as well as the capability to upload a transcript and a translation and synchronize both versions.
- **Language for Translation –** This designates the "translated" language in the bilingual viewer.
- **Type** (i.e. "oral history")
- **Thesaurus** - Choose thesauri for accessing controlled vocabularies in the indexing module. Pertains to the "Keywords," "Subjects," and "Titles" fields. Thesaurus must be uploaded in Thesaurus Manager or utilize "Library of Congress Subject Headings—Linked" (for the "Subjects" field).
- **Transcript Sync Data** - Metadata created in OHMS after a transcript has been synchronized.
- **Transcript Sync Data (Translation) –** Metadata created in OHMS after a translation has been synchronized.
- **Repository** - Automatically generated
- **CMS Record ID** - Automatically generated
- **OHMS XML Filename**
- **Use Restriction**

4.2 MEDIA HOST / MEDIA CONNECTION

A record in OHMS must connect to the item either by a direct hyperlink or by adding pertinent streaming service information (for compatible services). OHMS is not a media repository or streaming service, and audio or video items are not *uploaded* into OHMS. The Media Host and Media Connection section of the metadata editor contains multiple fields, which enables OHMS to effectively interface with the digital object via progressive download or compatible streaming service. The following are steps in identifying a media host and successfully creating the media connection:

- First, you must indicate whether you will be working with **Audio** or **Video.**
- Second, you must identify the **location** of the Audio or Video files.
- If you are using **direct linking** (progressive download / HTML 5 delivery) with a direct link to the media file via URL, you will need to select "**Host**" when setting up your interview.
- In most cases, direct linking to a web accessible media file will require populating the "media URL field." This URL must end with the audio or video file extension. See below for optimizing video for direct linking / HTML 5 delivery.
- If you are using a streaming service, the OHMS Application and the OHMS Viewer must be programmed to integrate with that service in order to remotely control the streaming service's player. Currently, OHMS works with the following streaming services:
    - YouTube
    - Kaltura
    - Brightcove
    - SoundCloud
- If you are working with digital video, you can either:
    - upload your video files to Youtube
    - use Brightcove
    - use Kaltura (Cloud or Local)
    - utilize HTML 5 delivery (see below for optimal settings)
- If you are working with the commercial vendor **Brightcove**, you will need to place the **host account**, **player ID**, and **item ID** numbers into the appropriate fields and choose Brightcove as your media host in order to access the media file.
- If you are working with **YouTube** you will need to make your video "**public**" in the YouTube settings. Simply insert the link generated (or the identifier associated with the "share" link) into the media URL field.
- If you are using **Kaltura**, you must paste the iFrame embed code into the **"Kaltura/SoundCloud iFrame Embed Code"** field.

- If you are using **SoundCloud**, you must paste the iFrame embed code into the **"Kaltura/SoundCloud iFrame Embed Code"** field.

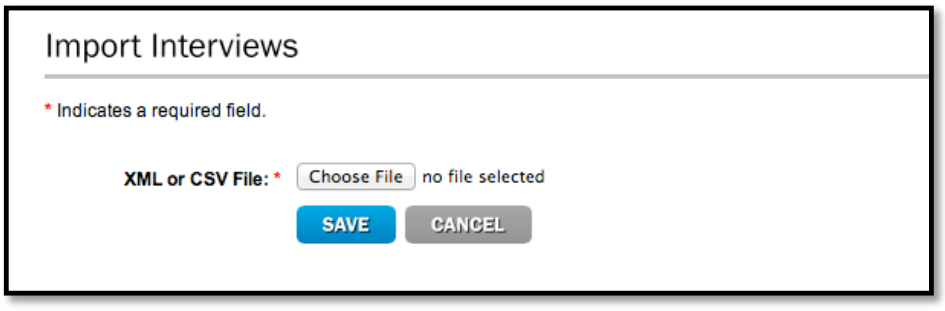
- If you are using **HTML5 delivery for video,** it is recommended that you encode your video resources using **h.264** and utilize the **.M4V** container. This will prove most effective integrating with the OHMS default player (jPlayer) in an HTML 5 environment. The HTML5 public user experience will require the use of an HTML 5 compatible browser. Testing of versions created from video editing/encoding applications is recommended to achieve successful and optimal results.

- If you are working with streaming services other than the ones listed, the OHMS viewer is customizable but will require programming of both the application and the viewer.

4.3 IMPORTING METADATA

Item level metadata can be imported into OHMS in order to initiate the creation of a transcript sync data or an interview index, or to re-import an OHMS XML file in order to update or edit the record.

Initial Import of Metadata:
Initial import of metadata into OHMS can be accomplished utilizing both CSV and XML files. The CSV import feature is designed only for initial import and requires structuring data in accordance with the authorized OHMS CSV Template. Records can also be imported in the form of an XML file in which the data is structured to conform to the OHMS XML standard (structured as though it has been downloaded from OHMS). Multiple XML files can be uploaded in batches if they are "zipped up" in a single directory.



Import Recommendation:
The CSV import feature is designed for initial (batch) setup of metadata records for OHMS processing. If you are on a Mac and using Microsoft Excel, it is recommended that you format the CSV file as a *Windows formatted .csv*.

Current importable (CSV) fields include:

- Title (required)
- Accession #
- Interviewee (multiple values separated by a semicolon ";")
- Interviewer (multiple values separated by a semicolon ";")
- Date (interview date—*must be structured as YYYY-MM-DD or MM/DD/YYYY*)
- Collection ID
- Collection Title
- Series ID
- Series Title
- Summary
- Subjects (multiple values separated by a semicolon ";")
- Duration
- Media URL
- Video ID
- Usage
- Rights
- Funding
- Format
- Language
- Type
- Transcript Sync Data
- CMS Record ID
- Date Non Preferred Format
- XML Filename
- Alt Sync URL
- Use Restrictions
- Keywords (multiple values separated by a semicolon ";")
- It is important that your Date field retains the structure YYYY-MM-DD or MM/DD/YYYY or else the import will fail.
-

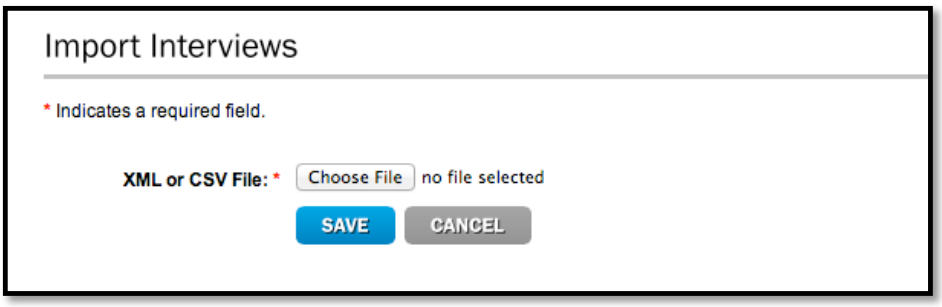
Note: The .csv file that you can *export* from OHMS is not designed to be imported back in to OHMS. Do not use a .csv exported from OHMS as a template for importing metadata, it will not import correctly. See section 11.1 of this guide for more detail on the .csv export feature.

4.4 IMPORTING AN OHMS XML FILE

There may be circumstances when an OHMS XML file will need to be imported back in to the OHMS Application. Examples include:

- Fix typos or mistakes
- Make additions or changes to the metadata
- Add an index or a transcript

Simply choose "Import" and upload the selected xml file.

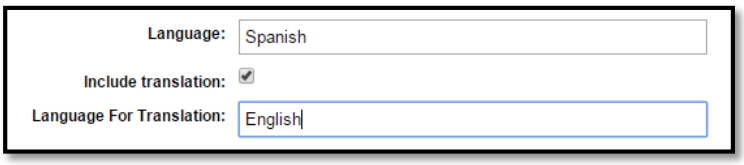


4.5 BI-LINGUAL INDEXING AND SYNCHRONIZATION

The OHMS Viewer has the capability for bi-lingual presentation of an index, as well as the capability to present a synchronized transcript and a synchronized translation.

In order to prepare to create a bi-lingual index or to synchronize a transcript and a translation you must

1. Identify the primary language
2. Check the "Include Translation" box
3. Identify the secondary language for translation



4.6 METADATA EDITOR: IMPORTANT NOTES

- **Required fields:** Title, media format, and applicable media delivery information, depending on your delivery platform (Media Host, Media URL, Media Host Account, Player and Item ID numbers, or the iFrame embed codes).

- **Media host:** This section determines the delivery source of the media file. If you are using YouTube or a streaming media host such as Kaltura, Brightcove, or SoundCloud, selecting this option provides the information necessary for OHMS to work with these

streaming services. If using Brightcove or Kaltura, see the specifics above in section 4.2 for requirements.

- **Media URL:** This field represents the web location for the digital audio or video. If you are *not* using a streaming service that requires additional information, the Media URL must be populated with a direct link to the media file in order to function in OHMS.

- **Transcript sync data:** Data for this field is automatically created by OHMS after syncing the transcript and is therefore remains empty during setup or metadata creation. Deleting this data will delete all synchronization / time code references and is not recommended.

- **Thesaurus (keywords, subjects, titles):** Assignment of a thesaurus for titles, subjects or keywords that will be auto-suggested while indexing a particular interview. Repository administrators and editors can upload a thesaurus in these categories. (See section 6.0 of this guide for more information.)

- **Use Restriction:** This field does not impact the OHMS Viewer but has been added as a field. Use of this field can serve to flag restricted content prior to putting an OHMS XML file/interview online. This field is both importable and exportable in the OHMS XML and CSV files. This field is for flagging purposes. OHMS will not automatically prevent restricted content from being made public, this is the responsibility of the individual/institution responsible for making the content public.

- **OHMS XML Filename:** The input in this field determines the filename of the exported xml file. This will make it easier to determine each interview's OHMS Viewer hyperlink. This field is exportable and importable via the OHMS XML.

- **Keywords:** This field functions much like the Subjects field to transport interview level metadata. This field is both importable and exportable in the OHMS XML and CSV files and does not impact the OHMS Viewer.

- **Acceptable Date Formats:** OHMS has been updated to accept a wider variety of date formats. It now accepts dates in the form of mm/dd/yyyy which is the default date format in Microsoft Excel.

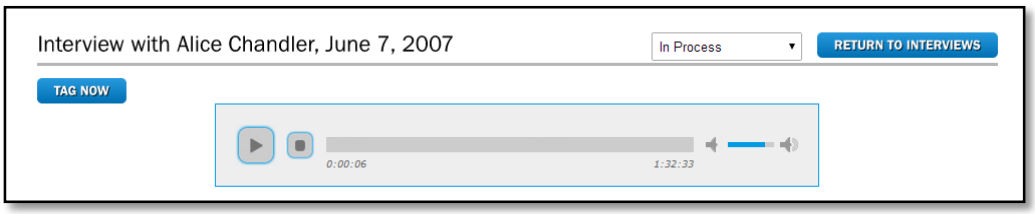
- **Collection/Series Links:** These fields are used to provide hyperlinks to users in order to navigate to an item's associated collection or series record. This allows users to return to an online finding aid or to an online catalog record from the OHMS Viewer.

- K**altura / SoundCloud Embed Codes:** In order for OHMS to work with Kaltura and SoundCloud, you will need to generate iFrame Embed codes.

5.0 INDEXING MODULE

The Indexing Module is deployed by clicking an item's "Index" button in the Interview Manager.

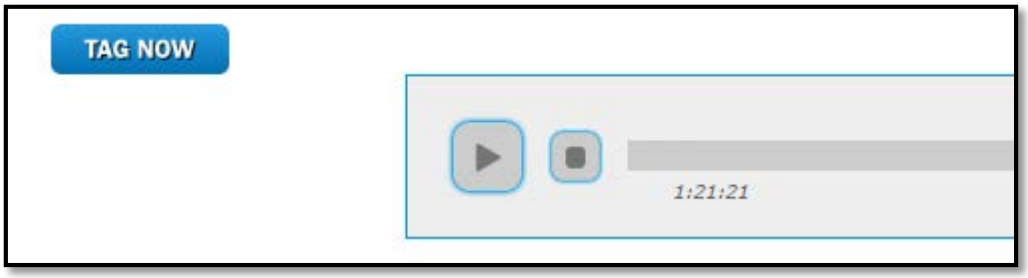
Activating the Indexing Module for the first time will present the player accompanied by the "Tag Now" button.



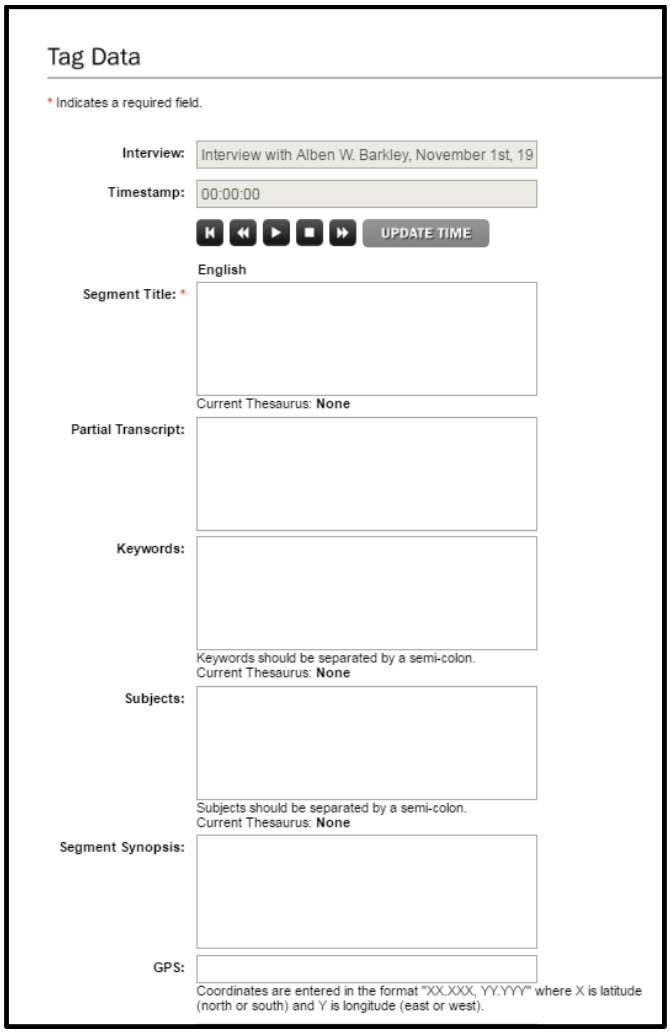
5.1: INDEXING CONTROLS AND WORKFLOW

In order to begin indexing an item, you must press the "**Play**" button on the player (JPlayer, YouTube, Brightcove, Soundcloud, or Kaltura).

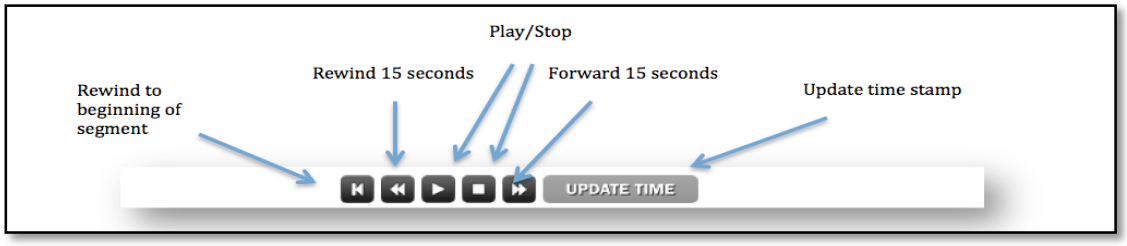
The audio or video must be playing in order to create an index point. While playing, a segment is created by pressing the "**Tag Now**" button at the appropriate moment.



When pressing "Tag Now" the indexer is presented with the tag data module. This includes player controls and a series of empty descriptive fields.



The indexer can control the player within the tagging module. The player backtracks a few seconds each time the tagging module is activated.



NOTE: There can only be 1 segment per time-code stamp.

5.2 INDEX MODULE METADATA FIELDS

An OHMS Index segment contains the following metadata fields:

- Time Stamp
- Segment Title (required)
- Partial Transcript
- Keywords (semi-colon delimited)
- Subjects (semi-colon delimited)
- Segment Synopsis
- GPS Coordinates
- GPS Zoom
- GPS Description
- Hyperlink
- Link Description

Time Stamp
A corresponding time stamp is created as soon as an indexer presses the "Tag Now" button. This time stamp may need to be adjusted in order for the segment to correlate to the intended moment.

Segment Title
Segment titles are required. The Segment titles function as chapter titles for the item's index.

Partial Transcript
Utilized to include a partial transcript of the segment.

Keywords
Allows for multiple entries, separated by a semi-colon. This field can be used in conjunction with a thesaurus to control or suggest terms. (See section 6.0 of this guide for more information).

Subjects
Allows for multiple entries, separated by a semi-colon, and can be used in conjunction with a thesaurus to control or suggest terms. (See section 6.0 of this guide for more information).

Segment Synopsis
The segment synopsis is designed to contain a descriptive summary of the segment.

GPS Coordinates
This field enables geo-referencing content which interfaces (for the public user) with Google Maps. Coordinates are entered in the format "**XX.XXX, YY.YYY**", where **X is latitude** (north or south) and **Y is longitude** (east or west). Only one set of coordinates is allowed per segment at this time. Note: There must be a space following the comma.

GPS Zoom
This dropdown field enables the indexer to determine a custom default zoom level presented to the public user within the OHMS Viewer. Choices include a scale ranging from 1 (world view) to 21 (street view). The default view is set at 17.

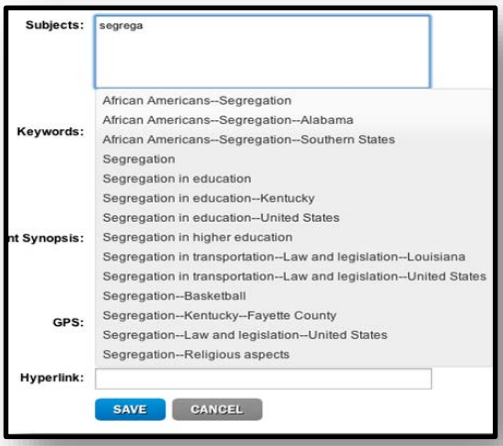
GPS Description
This field serves as a descriptive label for the specified GPS coordinates.

Hyperlink
This field allows a hyperlink to be present, connecting the segment to an external resource of any type. If the link is an image file, image will present to the public user in the form of a lightbox. Link to a webpage will open in a separate tab.

Link Description
This field serves as a descriptive label for the specified hyperlink.

5.3 USING A THESAURUS IN THE INDEXING MODULE

The segment **title**, **subjects** and **keywords** fields in the Indexing Module can utilize an assigned thesaurus to facilitate use of controlled vocabularies. A custom thesaurus can be uploaded for each of the three fields.

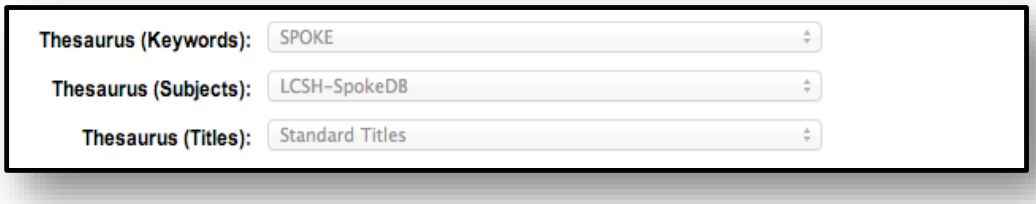


Each of these fields can be assigned a different thesaurus within an individual item or interview If a thesaurus has been uploaded and assigned in the metadata manager, terms will be suggested based on a partial keying of letters. For example, if the indexer begins typing "segrega" in the subjects field, all of the terms in the assigned thesaurus containing "segrega" will be suggested. The indexer selects the term desired and the term is automatically inserted into the subjects field.

This feature requires a thesaurus to be uploaded, and then assigned to the interview. (See section 6.0 of this guide for more information).

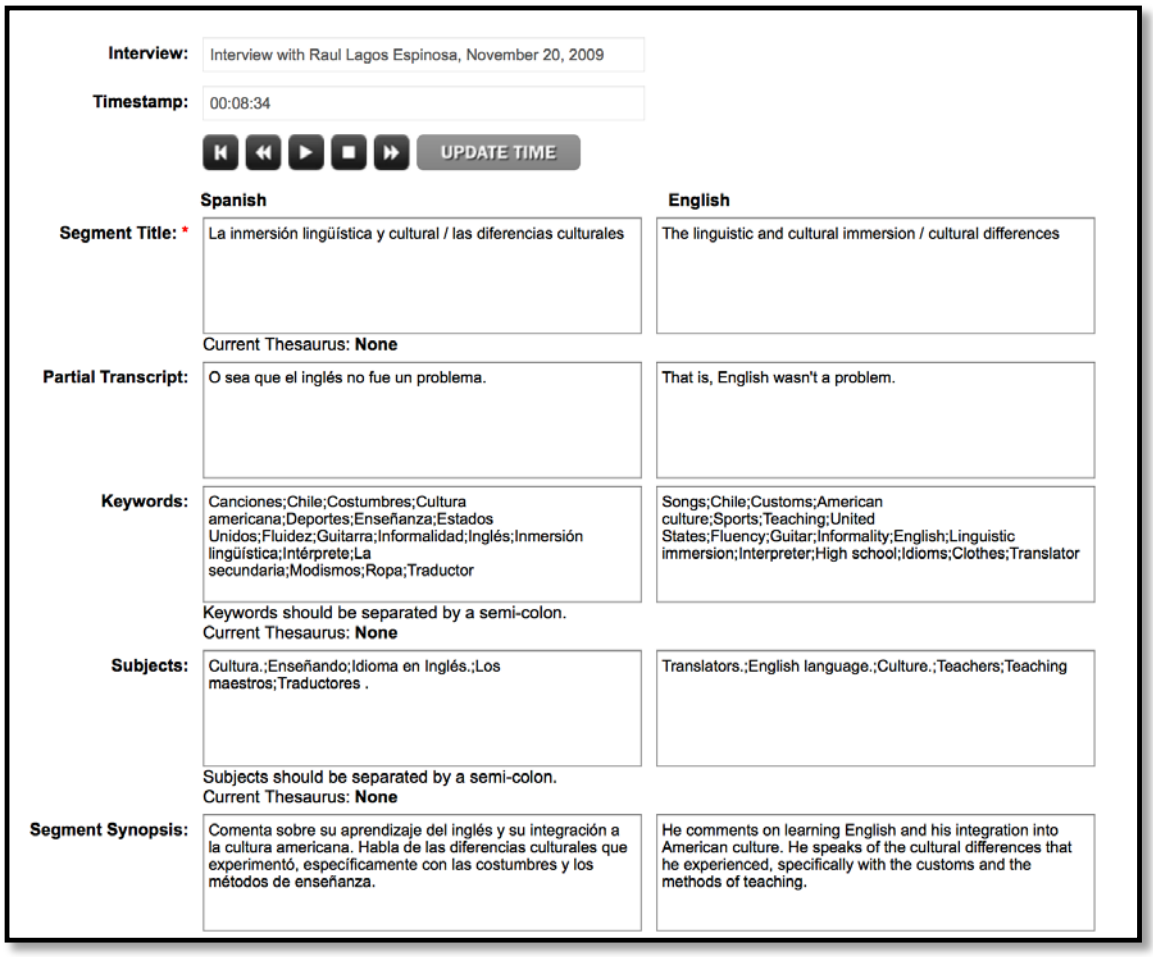
5.4 THESAURUS ASSIGNMENTS

During the metadata setup process for a record, you can assign an uploaded or linked thesaurus to a particular field (Keywords, Subjects, Titles). Once you save that record, the corresponding fields in the Indexing Module for that item will be assigned appropriately and the thesaurus will function as described in section 5.3.



5.5 BI-LINGUAL INDEXING

As mentioned in section 4.5 you must indicate in the metadata record that you intend to utilize the bi-lingual functionality of OHMS. Once you have identified a primary and secondary language and you have checked the box "Include Translation," the OHMS Indexing Module will present the indexer with two fields for each element instead of the default single field. The primary and secondary languages are listed at the top of each field.



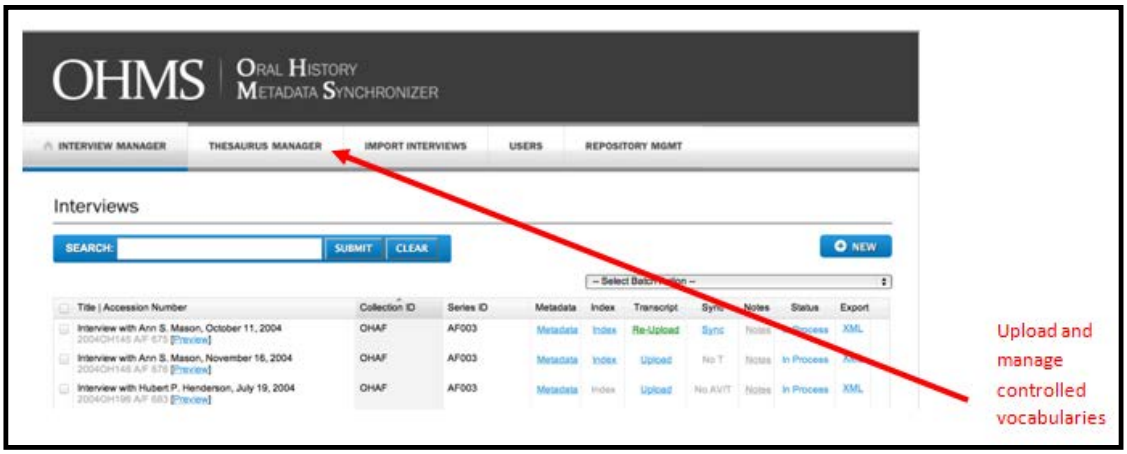
5.6 NOTES ABOUT INDEXING

Indexing is an incredibly subjective process and can be as comprehensive as you choose. For models on indexing and the Nunn Center's approach, we recommend consulting the Nunn Center's guide, *Indexing Interviews in OHMS: An Overview*, as well as the companion video tutorial.

6.0 THESAURUS MANAGER

In order to utilize a thesaurus and the controlled vocabulary functionality while indexing in OHMS, a thesaurus must be uploaded and assigned in the metadata record for an interview or item. These thesauri contain terms that will be auto-suggested in the corresponding fields of the indexing module while indexing. Thesauri can be assigned for the following fields in the interview index:

- Title
- Subjects
- Keywords



Thesauri must be uploaded as a **single-column .CSV file**. See section 6.1 of this guide for specifics regarding formatting your .csv file.

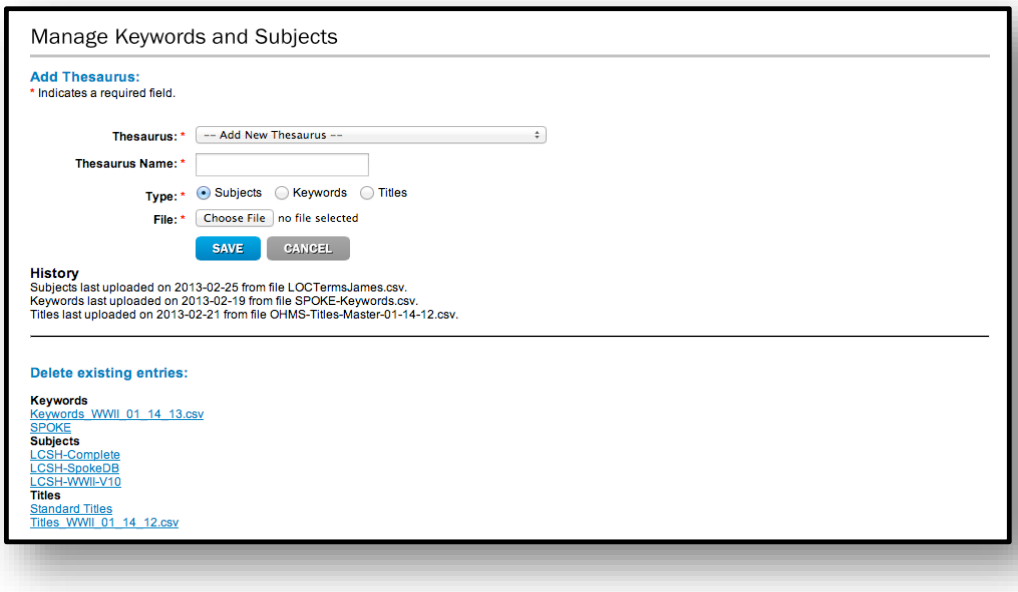
NOTE: Beginning with the OHMS Application **version 2.2.17,** the "Subject" thesaurus can utilize a "Linked" version of the Library of Congress Subject Headings. Headings have been harvested via the Library of Congress Linked Data service and become an optional thesaurus for the "Subjects" fields in the Indexing Module. You do not need to upload anything to utilize this functionality. You just need to assign the "Library of Congress Subject Headings (Linked) in the "Thesaurus (Subjects) field of that particular record in the Metadata Module.

This will link your item record to millions of subject terms. Greater specificity is recommended to best utilize this feature as results can easily overwhelm an indexer.

6.1 UPLOADING A THESAURUS

Prior to uploading a thesaurus, note the following:

- The .csv file must be formatted with terms aligned in a single column.
- If utilizing Mac and using Microsoft Excel, it is recommended to format the .csv as a *Windows formatted* .csv file.
- It is recommended that the uploaded thesaurus be assigned descriptive title and a version number so that a replacement file can be uploaded in order to add terms or revise a thesaurus.



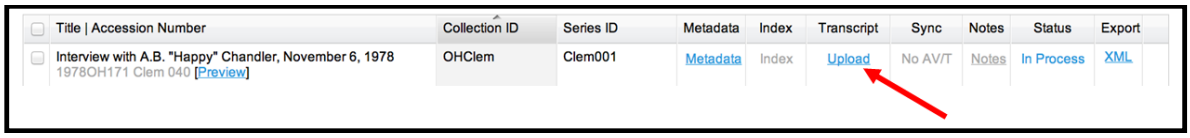
- *Thesaurus Upload Troubleshooting*: If the thesaurus upload is failing, typically this indicates that you have utilized the *.csv formatted for Mac* or *MS-Dos* (from Excel), or there could be the presence of a special character (such as an ampersand) which needs to be "escaped" for utilization in an XML environment. For example: "&amp" instead of simply typing "&" (not including quotation marks).

7.0 TRANSCRIPT SYNC MODULE

The purpose of the transcript sync module is to efficiently create time code references within an uploaded transcript. This will enable the linking of a public user's search of the text to the corresponding moments in the online audio/video interview. OHMS presents a user friendly, efficient method to drop time code into a transcript at 1-minute intervals.

7.1 UPLOADING A TRANSCRIPT

In order for the "sync" function to be enabled, you must first upload a plain text version (.txt saved in Unicode UTF-8) of the item or interview transcript which has been modified according to the *OHMS Transcript Formatting Guide* available at www.OralHistoryOnline.org.



Word processing applications such as Microsoft Word embed underlying formatting. Much of this underlying formatting is incompatible with XML. The process of preparing your transcripts for use in OHMS is critical for successful upload and implementation.

NOTE:

- It is recommended that you do not upload the transcript with title or disclaimer pages prior to the beginning of the actual transcript, as this will interfere with your time-code syncing efforts.

- Consult the Nunn Center guide for preparing transcripts for OHMS. This is a multi-step process that includes the removal of page numbers, headers, footers, the conversion of smart quotes to straight quotes, clearing formatting such as section breaks and tabs.

7.2 INITIATING TRANSCRIPT SYNCHRONIZATION

Once you have uploaded a transcript, you can begin the synchronization process. The "Sync" column of the interview manager will indicate an interview's eligibility for the transcript sync process.

- "No T": No transcript has been uploaded.
- "No AV": No media connection has been identified in item metadata.
- "No AV/T": No transcript has been uploaded and no media connection has been identified.
- "Sync": Transcript has been successfully uploaded and media connection has been identified.

By design, the OHMS transcript sync module allows you to listen to a brief interval located at the end of each minute of an interview. The default interval is 10 seconds. You can shorten or lengthen this lead time by changing the time interval next to the clock.

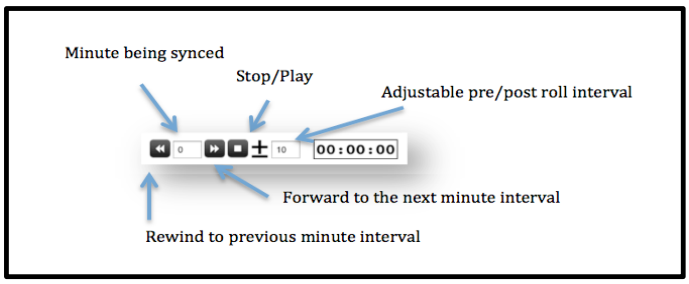
When beginning the transcript sync process, press "**Sync**" in the "Sync" column of the Interview Manager. This will open the transcript sync module containing the text, the appropriate player, along with a controller for that player to the right.

In addition to the transcript text, the player and the player/sync controller, you will see functional buttons to "**Edit Transcript**" or to "**Save**" your work. To make minor edits to the transcript, see section 7.4 of this guide.

You will have to save your work when completed in order to utilize the sync points in OHMS. It is strongly recommended that you save your work periodically during the synchronization process.

7.3 SYNCHRONIZING A TRANSCRIPT

1) The audio or video will begin upon opening the transcript sync module / pressing the "play" button on the player, depending on the media delivery method or player.



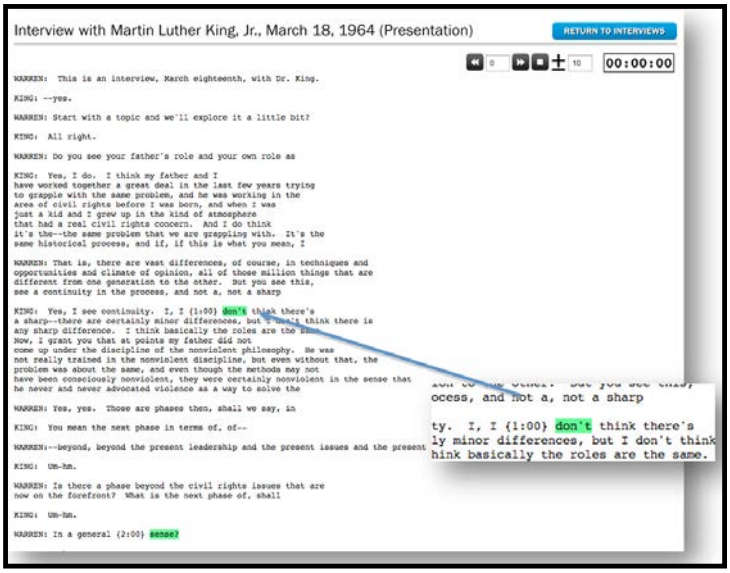
2) Click the forward button to navigate to the 00:00:50 mark prior to the first minute.

3) You will hear two chimes. Your **first chime** (lower pitched) is an initial warning, indicating that the user has ten seconds (or otherwise specified interval) to locate the corresponding section of the transcript.

4) When the user locates the corresponding text in the transcript, follow along.

5) At the minute mark, a **second chime** (higher pitched) will ring.

6) When the second chime rings, click on the appropriate word in the transcript that is heard during (or closest to) this chime. Clicking on the corresponding word places a time code marker into the text (marked in green). If you succeed in placing the marker, you are automatically taken to the next interval (00:01:50). If you fail to place the marker in the allotted time, the same audio segment will replay after the post roll completes (default is 10 seconds). It will continue to repeat until the marker is placed.

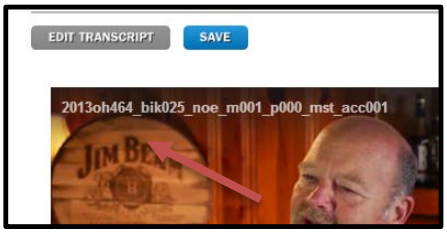


7) Users can adjust the sync point by rewinding back or forwarding to the appropriate segment. This is indicated by the clock and the minute-interval counter. Then users can correct your sync placement when the bell rings on the minute.

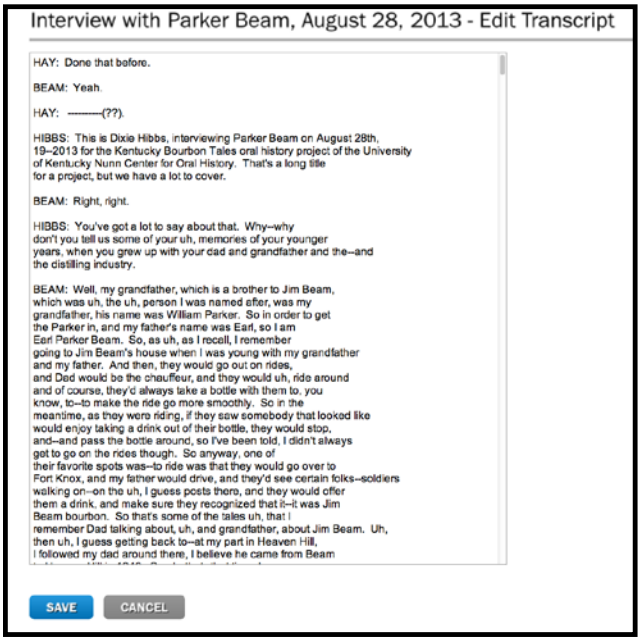
8) Users **must save work prior to exiting** or your sync data will be lost. There are save buttons at the top and bottom of the transcript.

7.4 MAKING MINOR EDITS DURING TRANSCRIPT SYNC

If at any time during the syncing process you wish to correct or edit the transcript, you can click the "Edit Transcript" button at the top or bottom of the transcript. This will automatically save the points you have already synced, and take you to the editing module. From here, you may make minor edits to the transcript, but be aware that this may change the placement of any sync points further along in the transcript.



The “Edit Transcript” feature in the Transcript Sync module is designed for minor edits only. Substantive edits should be made on the original .txt version of the transcript and will require you to re-upload the transcript**. Substantive edits will alter the line breaks** and, therefore, may alter sync points **following** the substantive edit, which may require re-syncing the transcript past the point of the edit.



7.5 TRANSCRIPT SYNC: HINTS AND REMINDERS

- Using the control+f / command+f keyboard shortcut in order to search for a word you hear in the 10-second lead time to quickly locate the Sync point in the transcript. The default 10-second lead is adjustable, users may work faster or slower if needed.

7.6 TRANSCRIPT SYNC: LINKABLE FOOTNOTES

The OHMS Application and the OHMS Viewer respond to linkable footnotes place in the document. These footnotes can contain text as well as hyperlinks. The OHMS utilizes BBCode in order to create linkable endnotes. This BBCode must be placed in the .txt document that is uploaded to the OHMS Application.

In order to implement linkable footnotes, utilize double brackets [[text]] in the text of the transcript

[[footnote]]1[[/footnote]]

[[footnote]]2[[/footnote]]

If utilizing footnotes at the end of the transcript, users may consider placing a textual heading such as “Notes” in order to (visually) separate the notes from the body of the text.

The following is sample footnote code to place at the end of your document for a standard note containing text, followed by a note containing text and a hyperlink:

[[footnotes]]

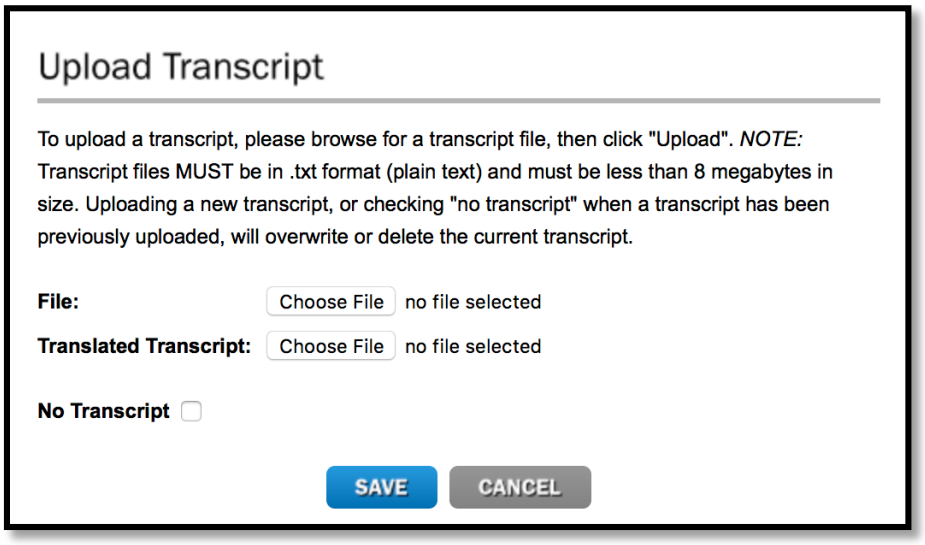
[[note]]Sample Text[[/note]]

[[note]] Sample Text[link]]http://www.oralhistoryonline.org[[/link]][[/note]]

[[/footnotes]]

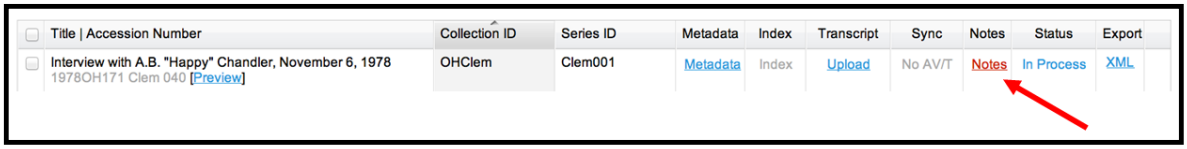
7.7 SYNCHRONIZING A TRANSCRIPT AND A TRANSLATION

If you intend to synchronize both a transcript and a translation (see section 4.5 of this guide for initial setup of the bi-lingual environment in the metadata module), you will be prompted to do so in the transcript upload dialogue box.



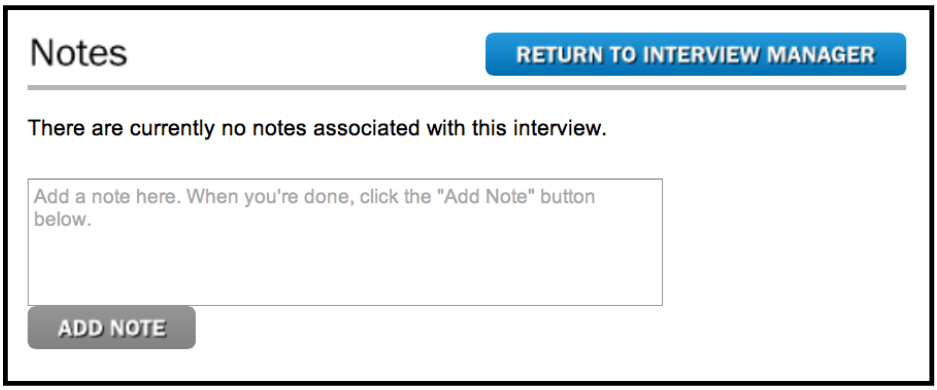
Following upload, you will be ready to synchronize. If you upload a transcript and a translation, you will need to synchronize both separately. You will synchronize each the same way you would synchronize a single transcript. Press "Save" when you complete the synchronization of the primary language text. Then select the translation button and repeat the process.

8.0 THE INTERVIEW MANAGER "NOTES" FEATURE



The notes function in OHMS can serve many purposes. These include flagging items with audio or video malfunctions, flagging elements within an item that need to be reviewed and addressed by the repository's administrator. Clicking "Notes" in the interview manager enables a user to create a note, which manifests in the "Notes" link turning red in the Interview Manager.

Administrators will be automatically notified by email when a note is created. Adminstrators can click on the notes column to read the note and mark it "Resolved" when the issue has been addressed. If a note is unresolved, the "Notes" indicator in the interview manager will be red. When resolved, the button will turn green.



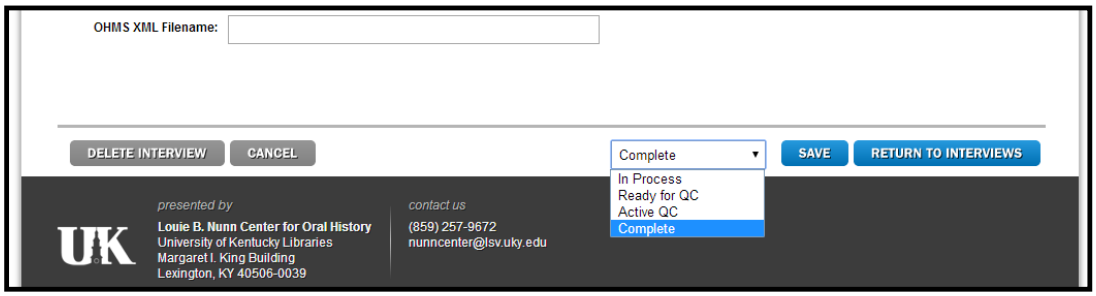
NOTE: This note has no presence in the exported XML file and is not retained once resolved.

9.0 WORKFLOW MANAGEMENT

The OHMS Interview Manager has a workflow management component to indicate the processing and quality control status as well as indicating an overall status for the process. This feature can be utilized to communicate status or readiness to other participants in the OHMS workflow (indexers, sync-ers, archivists, digital library managers). An indexer can use the workflow status to mark that processing an item has been initiated but has not, yet, been completed, indicate which phase of the process the item is in, and indicate that the processing for an item has been completed.

Processing

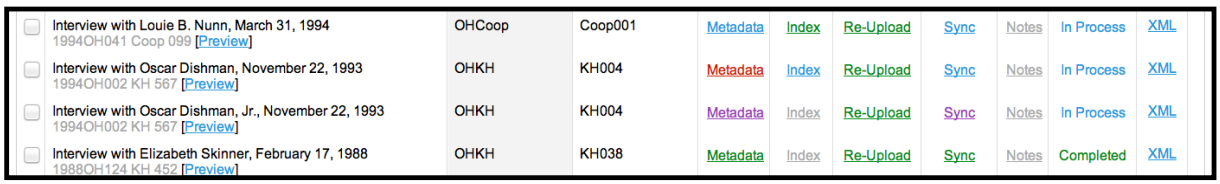
The "status" component of workflow management is handled individually through the Metadata, Indexing, and Transcript Sync modules. Each location presents a drop-down menu that allows users to choose from four options to set the status of each component.



Changing the status of these modules will automatically change the color of that module's indicator in the Interview Manager, giving you a visual indication of the status.

- Blue: "In Process"
- Red: "Ready for QC"
- Purple: "Active QC"
- Green: "Complete"

The indexing module also has an additional option: "Not Applicable", which will change the color of the word "Index" to gray in the interview manager. This is useful for when there will be a transcript but no index, allowing the overall status to ignore the absence of an index.



Status

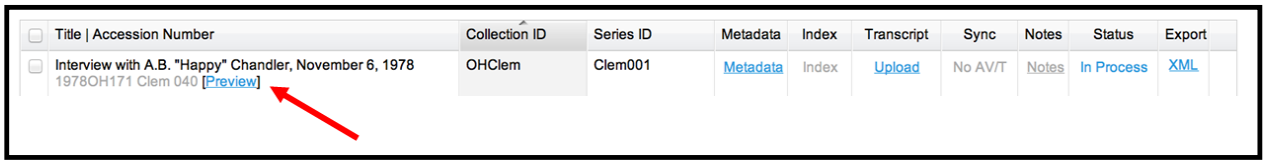
The status measurement is a way to communicate to other team members where an item is in the overall OHMS process. Repositories often contain multiple items representing different projects or collections that are being processed simultaneously. It is useful to have an "at-a-glance" view

of item statuses. Additionally, it is useful to have final confirmation that the OHMS export and the archival ingest of the XML file has been completed, prior to removing the record from the OHMS Application.

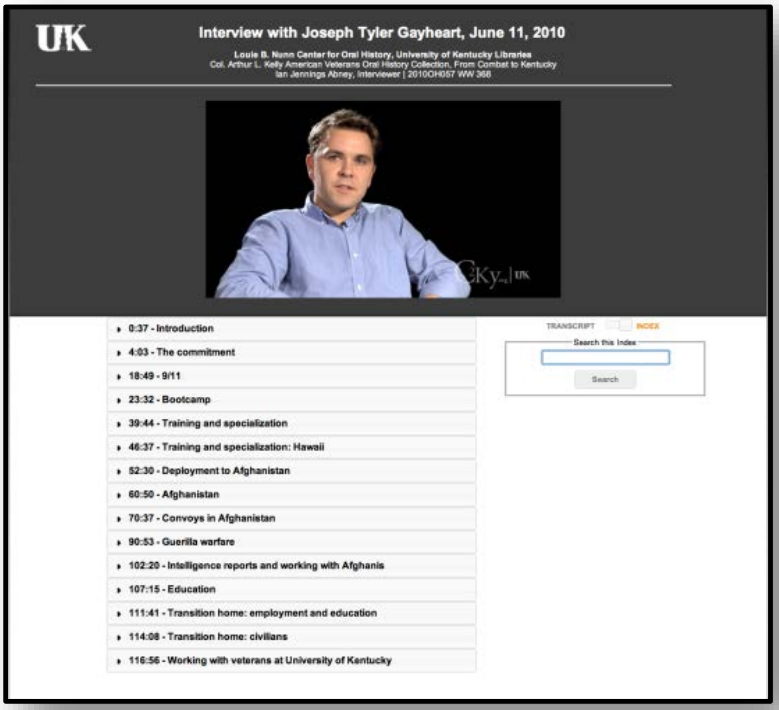
This process is automated based upon the manually set status of each module within the Interview Manager. An item automatically commences with a blue "In Process" status. When all status indicators for an interview are green (or gray, indicating that they are not applicable), the status indicator will automatically turn green indicating that the interview is "Complete."

10.0 THE PREVIEW VIEWER

As soon as an item has been loaded into OHMS and has an active link to a compatible media source, a preview option will be available.

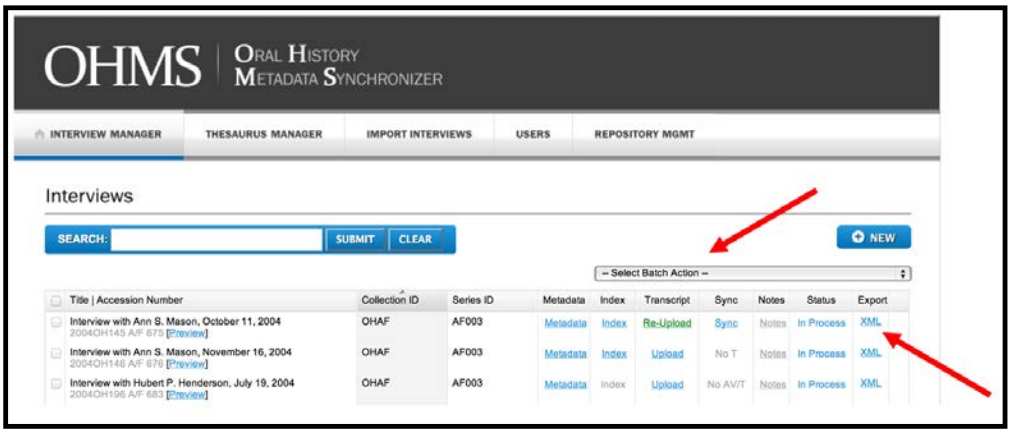


Clicking on the preview option activates the OHMS Preview Viewer where users can preview an item index or transcript synchronization as the public user will experience the item once made public. Use of this feature can improve the effectiveness of quality control. The Preview Viewer is a back-end viewer used for preview purposes, and is only accessible to authorized users of the OHMS Application Repository.



11.0 EXPORTING THE OHMS XML FILE

When processing of an item is considered complete, the OHMS XML file must be exported for public use via the OHMS Viewer. Upon clicking the "XML" export link for a specific record, an XML document will be created and downloaded. By default, the filename of the downloaded file is determined by the entry in the "OHMS XML filename" field in the item's metadata record. If no filename is present in the OHMS XML Filename field, the resulting file name of the downloaded XML file will be auto-generated.



Upon completion of indexed or synchronized items, the OHMS XML file must be exported individually or by using the batch export function.

The XML file exported by OHMS is designed for portability and interoperability. This XML file contains data from each of the fields present in the Metadata Module, includes the uploaded transcript/translation with corresponding sync information, as well as the contents of an index.

NOTE: There are fields present in the exported OHMS XML file that do not render in the OHMS Viewer. These fields are present in order to utilize the OHMS XML file as a vehicle for transporting and preserving metadata, in addition to enabling the core functionality provided by the OHMS Viewer.

```
<?xml version="1.0" encoding="UTF-8"?>
- <ROOT>
  - <record dt="2016-04-07" id="00023530">
      <version>4</version>
      <date format="yyyy-mm-dd"/>
      <date_nonpreferred_format>Unknown Date</date_nonpreferred_format>
      <cms_record_id/>
      <title>Blank XML</title>
      <accession/>
      <duration/>
      <collection_id/>
      <collection_name/>
      <series_id/>
      <series_name/>
      <repository>Workshop</repository>
      <funding/>
      <repository_url/>
      <file_name/>
      <sync/>
      <media_id/>
      <media_url/>
    - <mediafile>
        <host>Other</host>
        <host_account_id/>
        <host_player_id/>
        <host_clip_id/>
        <clip_format/>
      </mediafile>
      <kembed/>
      <language/>
      <index/>
      <type/>
      <description/>
      <rel/>
      <transcript/>
      <rights/>
      <fmt/>
      <usage/>
      <userestrict>0</userestrict>
      <xmllocation/>
      <xmlfilename/>
      <collection_link/>
      <series_link/>
    </record>
</ROOT>
```

11.1 EXPORTING A CSV VERSION OF YOUR DATA

The CSV export functionality has been added with the purpose of providing an option for transporting collection, item, and OHMS generated metadata to a content management system. Although transcript and index data is included in the CSV export, **the CSV export contains no OHMS functionality.**

This export has been added to include a convenient way of transporting metadata from OHMS to a CMS such as Omeka or CONTENTdm. The OHMS XML is still required for the OHMS Viewer to function. The textual contents of the transcript and/or index are included in the exported CSV file as a simple method for incorporation of the transcript and index-level metadata into the global search of a CMS. The contents of these fields in the CSV file are not intended for public viewing (formatting has been removed). In this use case, transcript and index text is mapped to hidden (but searchable) fields in the CMS record.

NOTE: The CSV **export differs from the initial CSV metadata import** (which requires mapping data in order to conform to the provided OHMS CSV import template). The *exported* CSV is not designed to be re-imported into OHMS.

12.0 THE OHMS VIEWER

OHMS is a two-part system that includes the OHMS Application (where preparatory work is completed) and the OHMS Viewer (where synchronized/indexed audio or video presents to the user).

Although work can be previewed inside the OHMS Application, this is not meant to be a public access point. In order to provide the OHMS user experience (searchable time-synchronized transcripts or indexes) for online audio or video, the following steps must be followed:

- Install the latest version of the OHMS Viewer in your environment and configure the OHMS Viewer to work in the server environment
- Export the OHMS XML file from the OHMS Application
- Place the OHMS XML file in the server environment (in accordance with the viewer configuration)
- Link to the XML file from the CMS to (or embed the viewer using iFrames)

12.1 INSTALLING THE OHMS VIEWER

Consult the various guides for detailed information regarding the installation and configuration of the OHMS Viewer (http://www.oralhistoryonline.org/documentation/), however, there are some basic principles that we will outline here:

- Identify where the OHMS Viewer will be installed. The OHMS Viewer requires a basic LAMP server environment and works well in either an enterprise or in a third-party, shared hosted environment (such as GoDaddy.com or Reclaim Hosting).

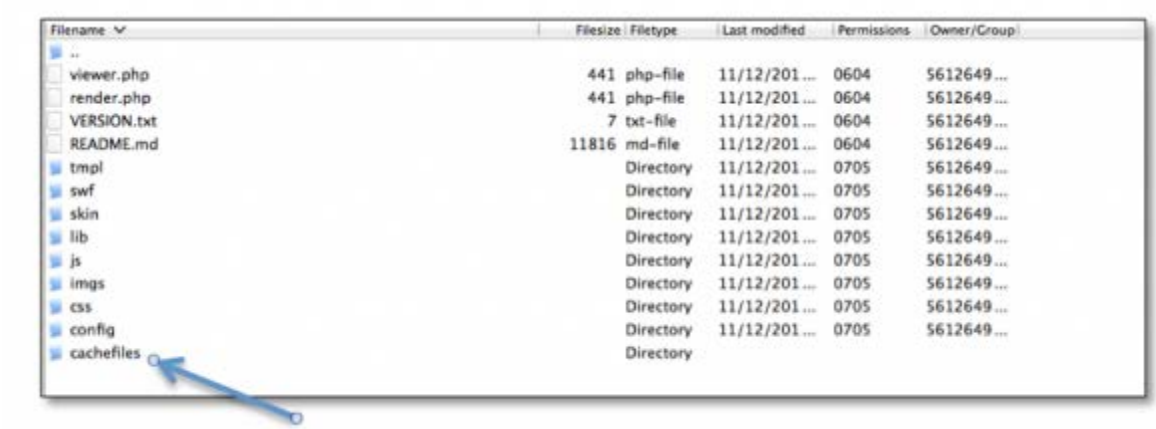
- Download the latest version of the OHMS Viewer (http://www.oralhistoryonline.org/start-using-ohms/)

- Place the viewer contents into a subfolder within the web root. Name this directory **"ohms-viewer"** or something similar. This directory can be named anything, it will serve as the root of the hyperlink linking from the CMS to the OHMS xml file. Depending on the webhost, you may need to use an external FTP application such as Filezilla to move the unzipped installation files into your new directory. Some hosts allow the upload of the zip file, and will "extract" the contents. Mine requires I unzip on my local computer and use an FTP application to upload the contents.

- Configure your OHMS Viewer. There are some basic steps for basic viewer configuration which involve editing the **config.ini file** (See Section 12.2)

12.2 CONFIGURING THE OHMS VIEWER

The first step in configuring the OHMS Viewer is to identify where the viewer will access the OHMS xml or "cache" files exported from OHMS. The cache files can be located on the same server, inside the OHMS Viewer directory, or on another server. We typically create a directory designated as "**cachefiles**." **NOTE: Make sure directory permissions allow access.**



If you do place the **cachefile** directory *within* the same folder containing the OHMS Viewer, be conscious of this when you upgrade your OHMS Viewer. The OHMS Viewer upgrade process involves *overwriting* preexisting files with the new ones.

We purposely left out an empty "cachefiles" directory in the viewer installation/upgrade so that the folder containing the XML/cachefiles will not be inadvertently overwritten. That said, be careful if your "cachefiles" directory is inside the viewer installation. It is recommended that you backup the cachefile directory prior to performing an upgrade.

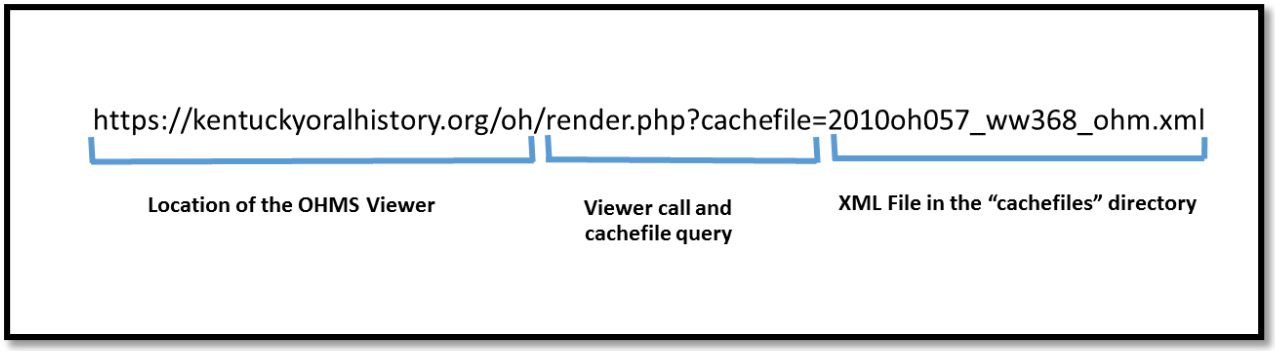
Next, you must create the "Config.ini" file. Rename the provided "**config.template**" file to "**config.ini**". Open the **config.ini file** (this should open with a very basic text-editing program. Within config.ini, there are multiple settings where values can be assigned. Here is a list of each config.ini settings and that settings function:

- **tmpDir** – This is the absolute hosting path to where the XML files are contained. You may need to get this information directly from your web host. For example:
  - /var/www/OHMSViewer/cachefiles
  - /home/content/uniqueID/html/ohms-viewer/cachefiles
- **players** – A comma-delimited list of players that you want to support. Unless you are customizing OHMS to play with your own player, this should not be changed.
- **Timezone** – This is your local timezone. This must be entered in an appropriate format. For a list of acceptable timezones, please visit http://php.net/manual/en/timezones.php. For the Nunn Center the config field looks like this: timezone = America/New_York

- **Repository**: Set the repository name. Replace the existing entry that states [Your Repository Name] with your repository name as entered in the "repository" data field of your cache *files. The names must match (the same uppercase or lowercase letters, spacing, and any punctuation)* the corresponding repository name in the OHMS Application. For example, if your repository's name is [John J. Doe Center, University of Us] then that is what must be entered in the config file.
- **css** – The filename of a custom CSS file that you would like the viewer to apply. Only enter the filename, not a path. The path is assumed to be <viewer_folder>/css.
- **footerimg** – A relative path to the image/logo. For instance, if image was located in /var/www/OHMSViewer/imgs/footer.jpg, then the value for this would be imgs/footer.jpg. Image is located in the upper left quadrant of the viewer.
- **footerimgalt** – A caption for the image, mainly used for accessibility purposes (screen readers) to describe what the image is.
- **contactemail** – Primary contact email for this viewer. This will be the default contact link in the viewer footer.
- **contactlink** – Fully qualified URL linking to the website for the user/organization responsible for the viewer, for example http://www.nunncenter.org.
- **copyrightholder** – This field is the name of the user/organization who owns the copyright to the interviews contained within the viewer.
- **open_graph_description** – The name of the organization using the viewer, as intended to appear via social media harvest.
- **open_graph_image** – Image to be used for social media thumbnails. Entered in the same format as footerimg above.
- **ga_tracking_id –** *Google Analytics* Tracking ID
- **ga_host –** Your *Google Analytics* host name

12.3 CONSTRUCTING LINKS TO THE OHMS XML FILE

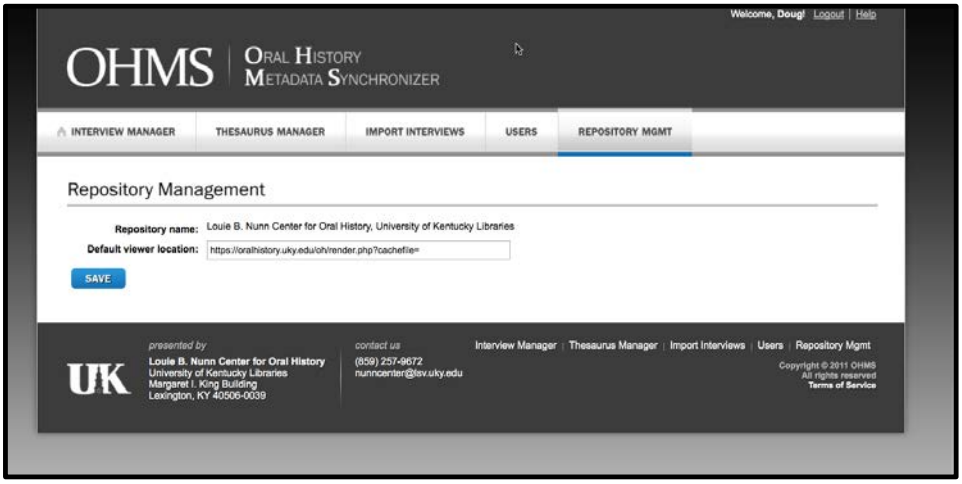
In order to render an item in the OHMS Viewer, one must construct a hyperlink linking directly to the XML file in order to call the OHMS viewer and identify the specific XML file that the link is intended to render. The following include the critical elements of the URL: **Part 1** of the URL will always remain the same, linking to the location of the OHMS viewer. **Part 2** will always be the render.php call and cachefile query, followed by **Part 3** which includes the corresponding filename for the intended OHMS XML file located in the cachefiles subdirectory of the OHMS



viewer. A typical link to an item utilizing the OHMS viewer will look like this:

Place hyperlink in appropriate location of CMS.

Automating the URL Generation: The link to the XML file can be generated automatically by OHMS and placed into a field within the OHMS XML file prior to download. This function can be useful if your workflow is constructed to automatically harvest links to the OHMS XML from within the XML itself. In order to take advantage of this feature, repository admins can enter a default viewer location (parts I and II of the URL above). As long as the metadata element "**XML Filename**" is populated for the particular item you are exporting, OHMS will combine the root location of the OHMS Viewer with the specified "XML filename, forming a functional link that auto-populates the OHMS "XML Location" field in the exported XML file.



12.4 UPGRADING THE OHMS VIEWER

Here are the steps for upgrading the OHMS Viewer:

- Make offline copy of:
  - config.ini file located in the *config* subdirectory.
  - cachefile subdirectory (or directory configured to house the OHMS xml files).
- Download the latest version of the OHMS Viewer. Unzip download.
- Access your viewer on the server (via ftp or web interface).
- Change the filename of the old viewer.
  - Example: If previous version of OHMS Viewer is called *OHMS_Viewer*, change to *OHMS_Viewer_3.3.1*
- Create new directory labeled *OHMS_Viewer* or what your previous viewer was called.
- Copy your archived *config.ini* in the new *config directory*.
- Copy your archived *cachefiles* subdirectory into the root of the new viewer directory.

Note: the new (upgraded) viewer does not contain a config.ini or a cachefiles directory. These critical elements were created and set this up during initial setup of the viewer. Please back these files/directories regularly, but especially prior to an update/upgrade to a new version of the viewer.

13.0 REMINDERS/KNOWN LIMITATIONS/BUGS

- The OHMS Application is hosted by the University of Kentucky Libraries and is periodically updated. In some circumstances, these updates require scheduled downtime. The OHMS Viewer, however, is an entity that you install and manage. It is recommended that you keep your OHMS Viewer up to date and back up your cachefiles directory.

- Internet Explorer is not recommended for the OHMS Application at this time. This does not involve the user interface of the OHMS Viewer, just the OHMS Application. Compatibility is best when using Firefox, Chrome, or Safari.

- The OHMS transcript sync and indexing modules create time-dependent metadata. You should not make any changes to the media time-code after processing in OHMS. Any edits that change the duration of the item will alter the location of the sync markers and index points, and thus disrupt the correspondence between markers and content.

- It is strongly recommended that you preserve your OHMS XML files following export. These will be critical for re-importing for updating information in a record or fixing a rare typo.