

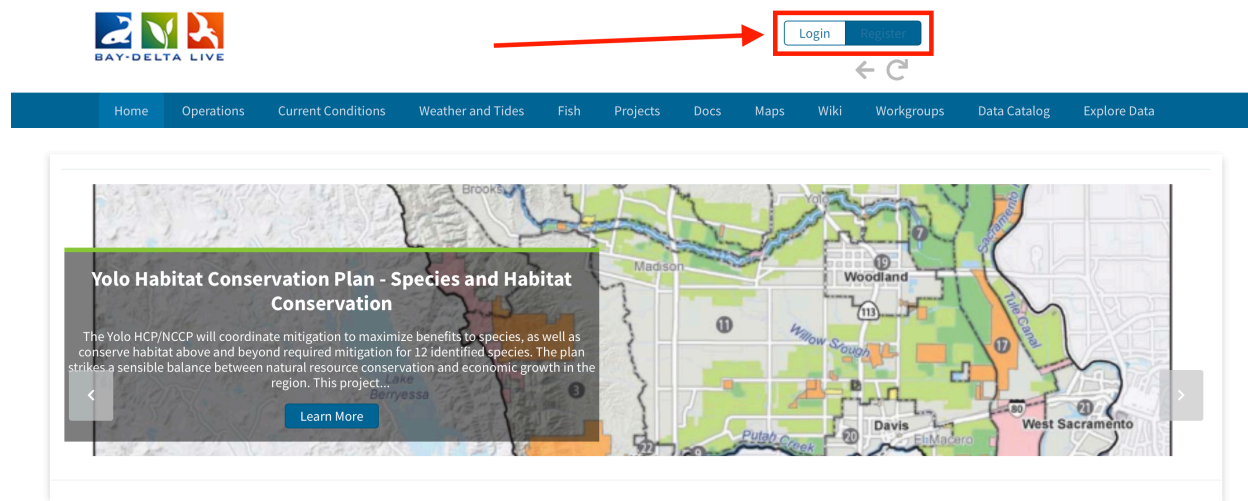
How to Edit the Metadata of a Project Page

Welcome to the How to Edit the Metadata of a Project Page video tutorial.

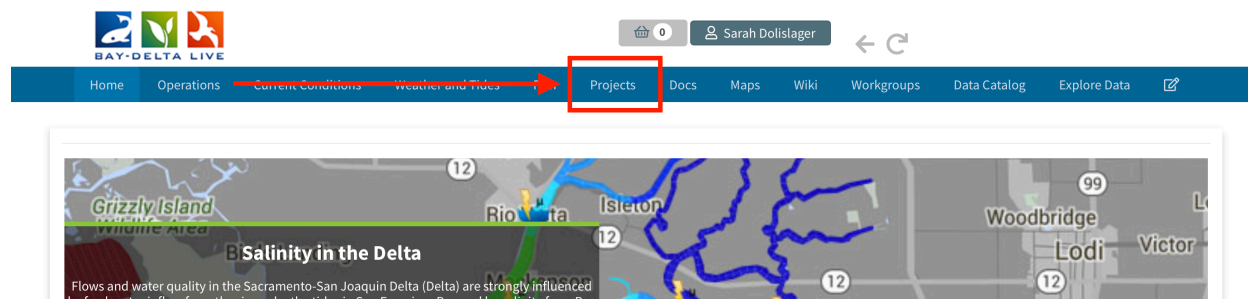
In this tutorial, we will go over how to edit the metadata of a project on Bay-Delta Live.

The metadata of a project includes the title, description, author, type, keywords, etc. You can edit all of this information using the metadata editor form.

To begin, be sure to login by using the “Login” button at the top of the screen.

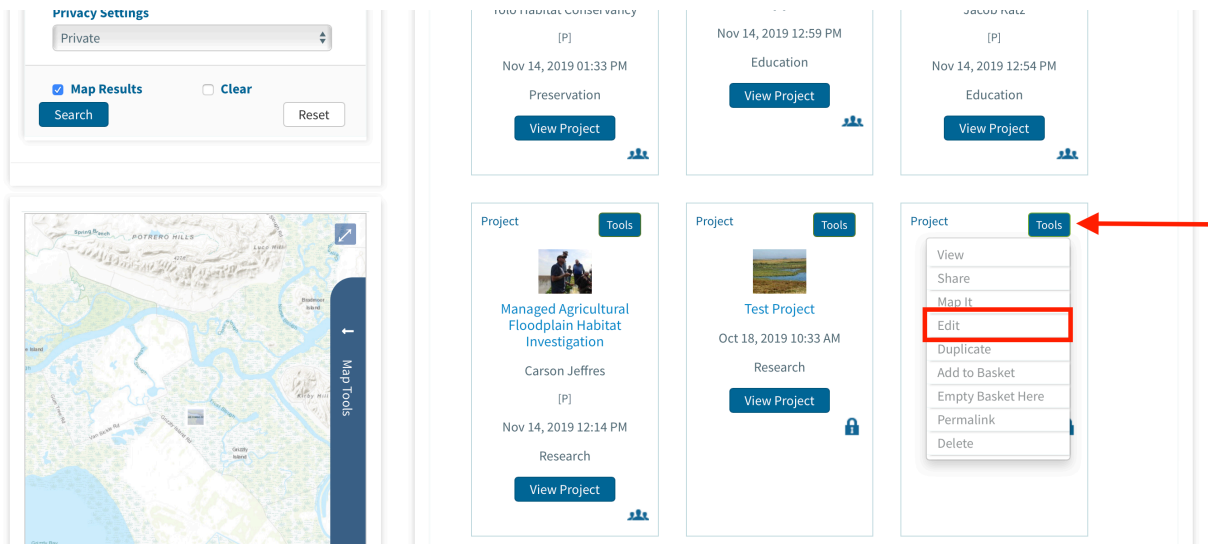


After logging in, you can access the Project Library by clicking on the “Projects” link in the top bar.

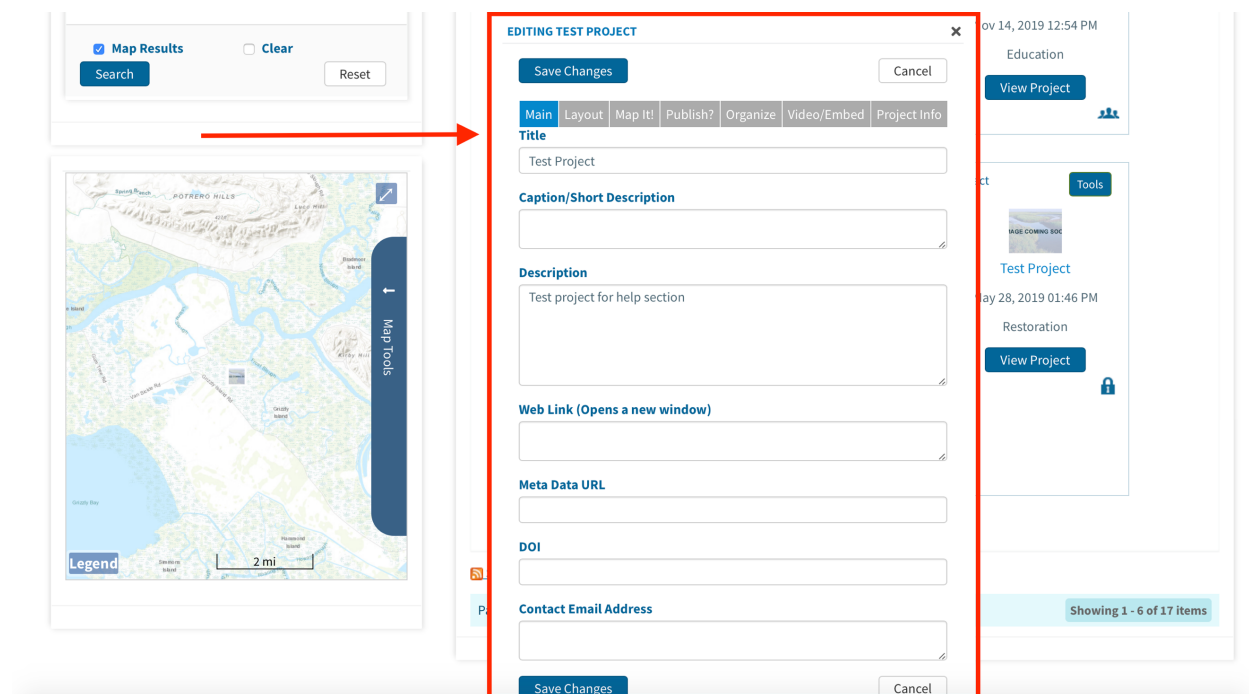


TOOLS MENU

To edit the metadata of a project page, hover over the Tools menu and choose “Edit.”



The metadata editor form pops up. You can fill this out with the necessary information.



Be sure to click “save changes” when you’re finished.

This screenshot shows the metadata editor interface. On the left is a map of the Potrero Hills area. The main panel on the right contains several form fields: 'Title' (containing 'Test Project'), 'Caption/Short Description' (empty), 'Description' (containing 'Test project for help section'), 'Web Link (Opens a new window)' (empty), 'Meta Data URL' (empty), 'DOI' (empty), and 'Contact Email Address' (empty). At the top of this panel are 'Save Changes' and 'Cancel' buttons. A red arrow points from the 'Save Changes' button in the map panel to the 'Save Changes' button in the main panel.

BASIC INFORMATION

The first tab on the metadata editor form is the “Main Tab.”

This screenshot shows the 'EDITING TEST PROJECT' form. The 'Main' tab is selected and highlighted with a red box. A red arrow points from the 'Map Results' section on the left to the 'Main' tab.

This is where you will enter a project’s Title and Description.

This screenshot shows the 'EDITING TEST PROJECT' form with the 'Main' tab selected. Two red arrows point to the 'Title' field (containing 'Test Project') and the 'Description' field (containing 'Test project for help section').

These two sections are important because the search function uses these words as keywords when other users search in the project library.

Another important section of the Main Tab is the Contact Information for the project. Be sure to include a phone number or email address for the project contact here.

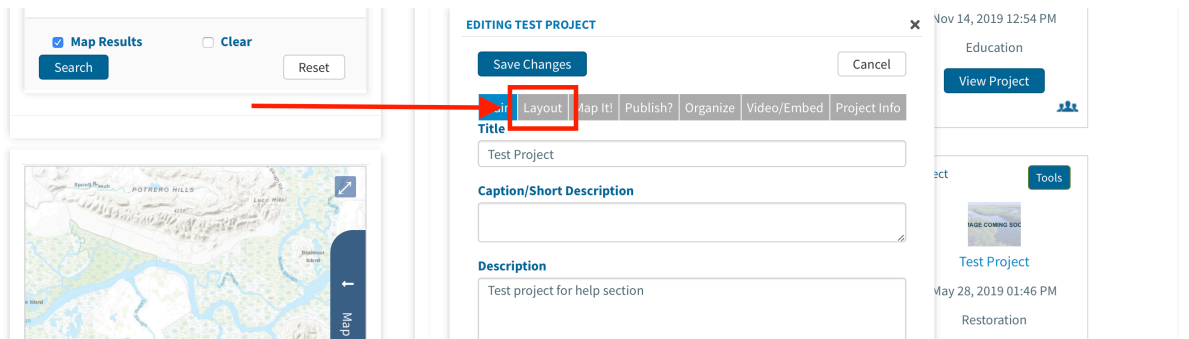
The screenshot shows a web interface for creating a project. On the left is a map of the Potrero Hills area. The main form has tabs for Main, Layout, Map It!, Publish?, Organize, Video/Embed, and Project Info. The Main tab is active, showing fields for Title (Test Project), Caption/Short Description, Description (Test project for help section), Web Link (Opens a new window), Meta Data URL, DOI, and Contact Email Address. A red arrow points to the Contact Email Address field. There are 'Save Changes' and 'Cancel' buttons at the top and bottom of the form. On the right, there's a 'View Project' button and a list of projects, including 'Test Project' with a date of May 28, 2019 01:46 PM and a status of Restoration.

This information will populate on the “Recent Activity” page of the project.

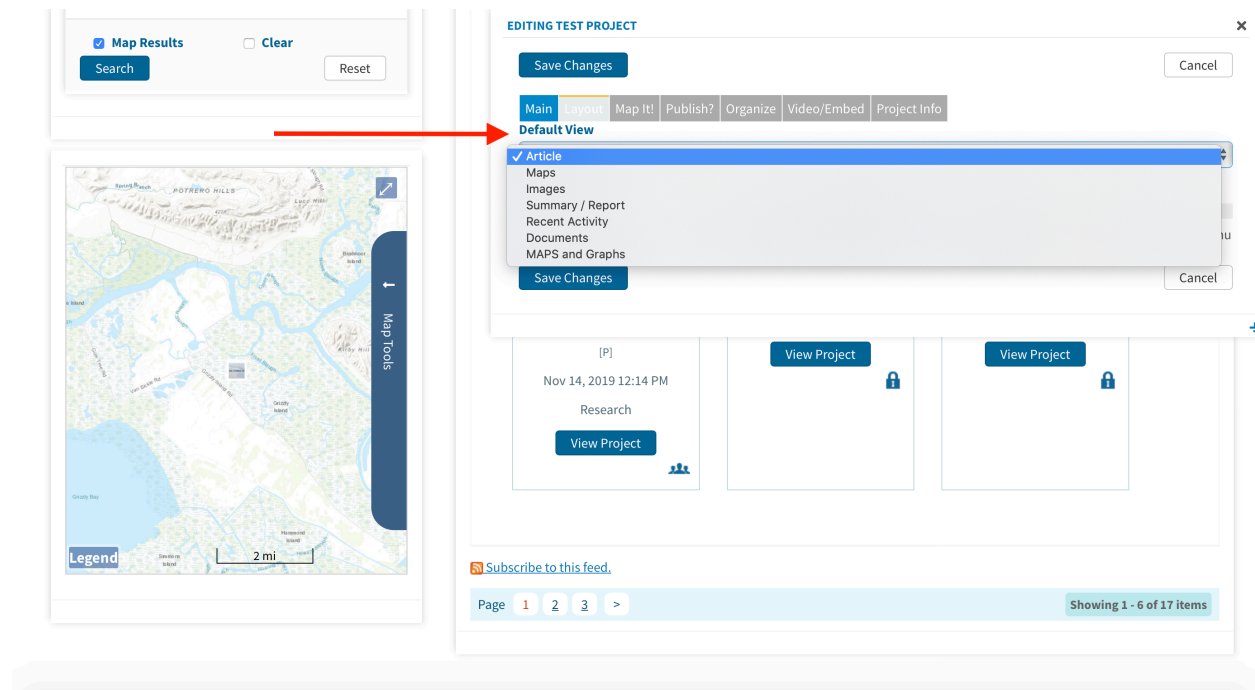
The screenshot shows the 'Recent Activity' page for the 'Yolo Habitat Conservancy' project. The top navigation bar includes 'Plan Summary', 'Covered Species', 'GIS Tools', 'Documents', and 'Recent Activity' (highlighted with a red box and a red arrow). The page is divided into three main sections: DETAILS, COMMENTS, and MEMBERS AND FOLLOWERS. The DETAILS section shows the project description, author/source (Yolo Habitat Conservancy), contact information, sub type (Species), and more info URL. The COMMENTS section shows 'No comments.' and an 'Add Comment' button. The MEMBERS AND FOLLOWERS section shows a list of users: Dolistager, Sarah; Wagner, Karly; Admin, BDL; Dewan, Aimee; Lomas, Johnny; and Osti, Dave. Below these sections is a 'NEW UPLOADS' section showing four PNG files: White_Tailed_Kite.png, Western_yellow-billed_cuckoo.png, Western_Pond_Turtle.png, and Western_burrowing_owl.png. Each file has a 'No description available' message and a creation date of 2018-08-17.

PROJECT PAGE LAYOUT

The next tab is the “Layout” tab.



The Default View drop-down menu includes all the page options of a project. Choose the one you would like to have as the homepage.



“Article” is a good option because you can customize the page to showcase important information for the project.

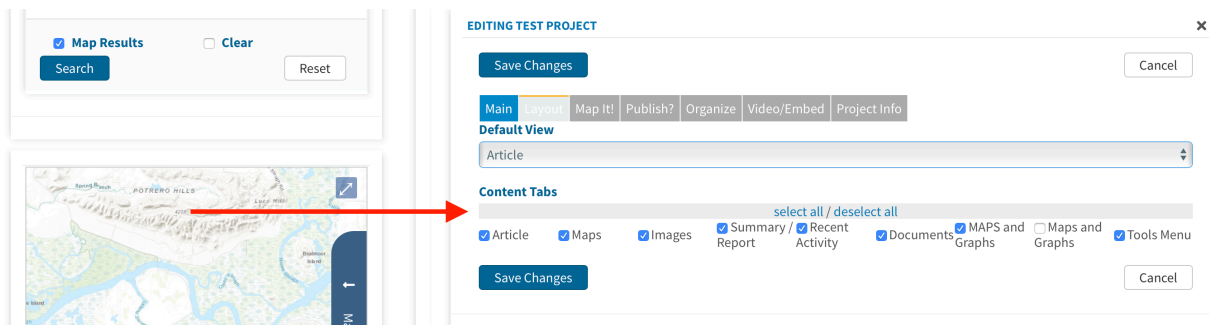
“Recent Activity” is also a good option because it shows information like the project members, description, contact information, and recently uploaded documents.

You can always come back and edit this information later.

The “Content Tabs” section gives you options to select which pages you want to include in your project.

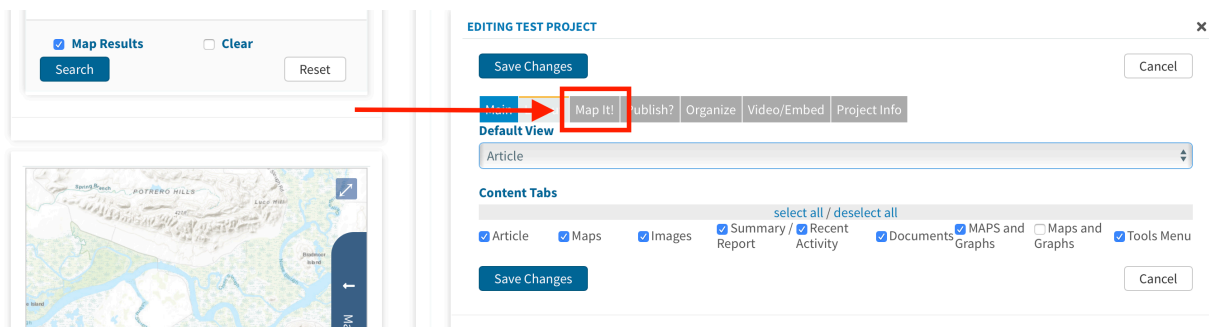
You can select or deselect options based on the way you want to organize your project.

If you are not sure which pages you would like to use, keep them all selected and come back to edit this section later.



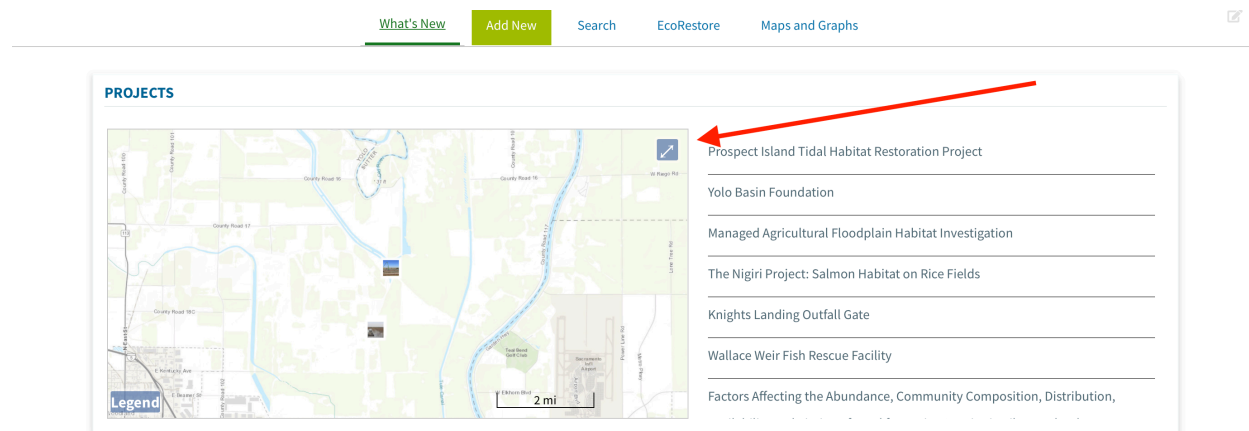
MAP THE PROJECT

Next, go to the “Map It” tab.

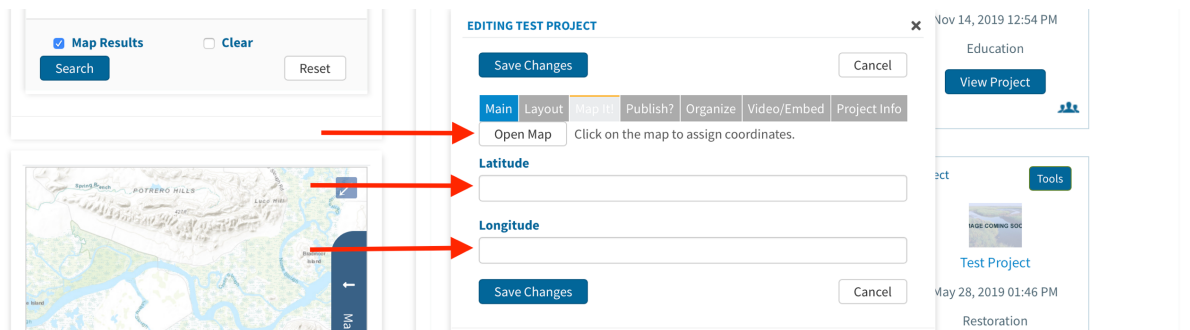


This function assigns coordinates to your project so it can be viewed on a map, as well as located when the map search function is used.

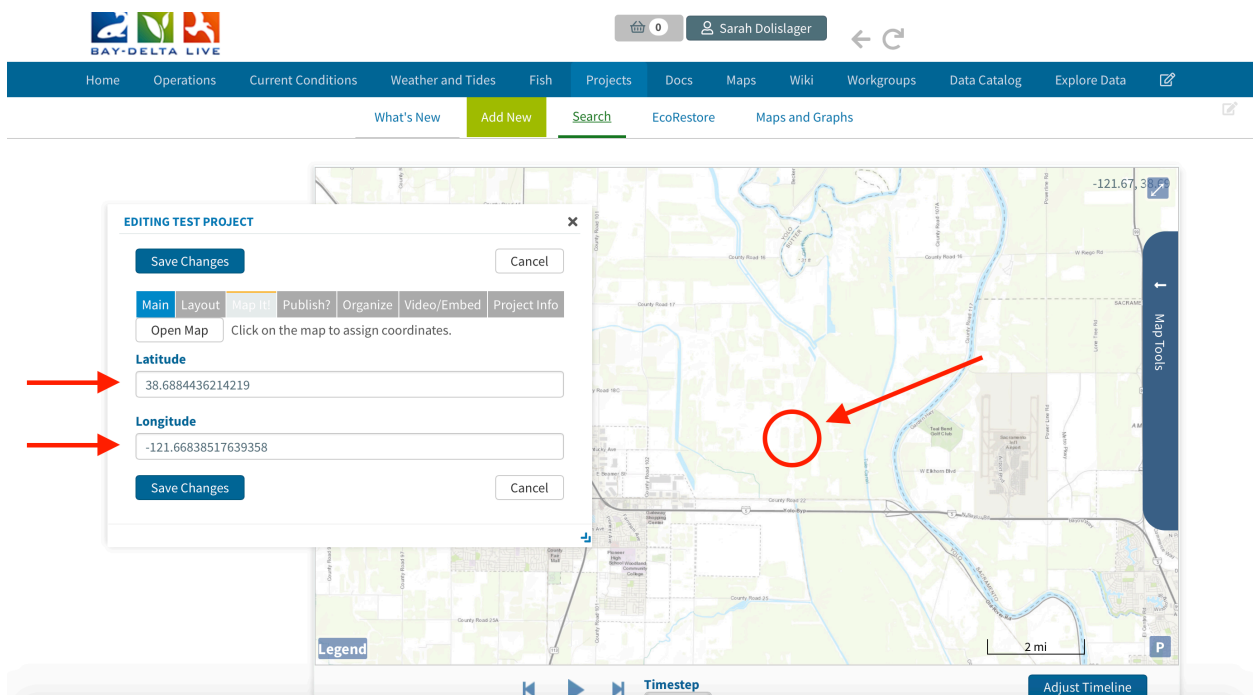
For example, this is what the map looks like in the project library.



Enter the Latitude and Longitude or Click the “Open Map” button to select a point on the map.

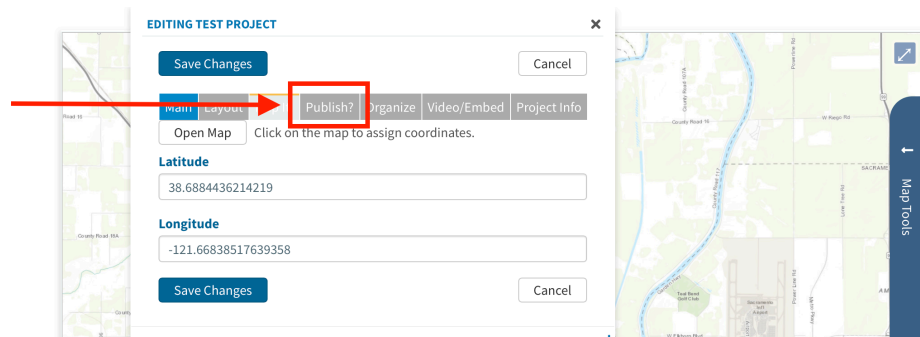


Once you select a point on the map, the coordinate values show up in the metadata editor form.

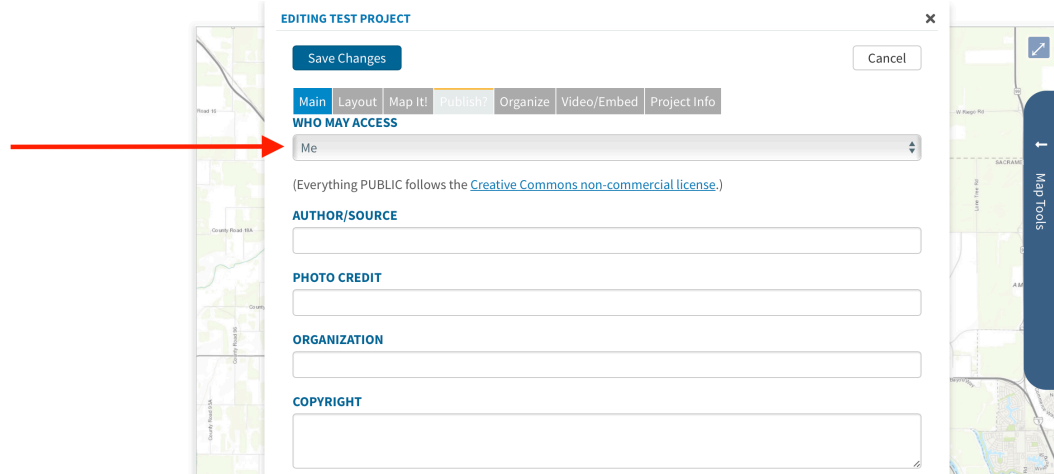


PRIVACY SETTINGS & PUBLICATION INFORMATION

Next, go to the “Publish” tab.



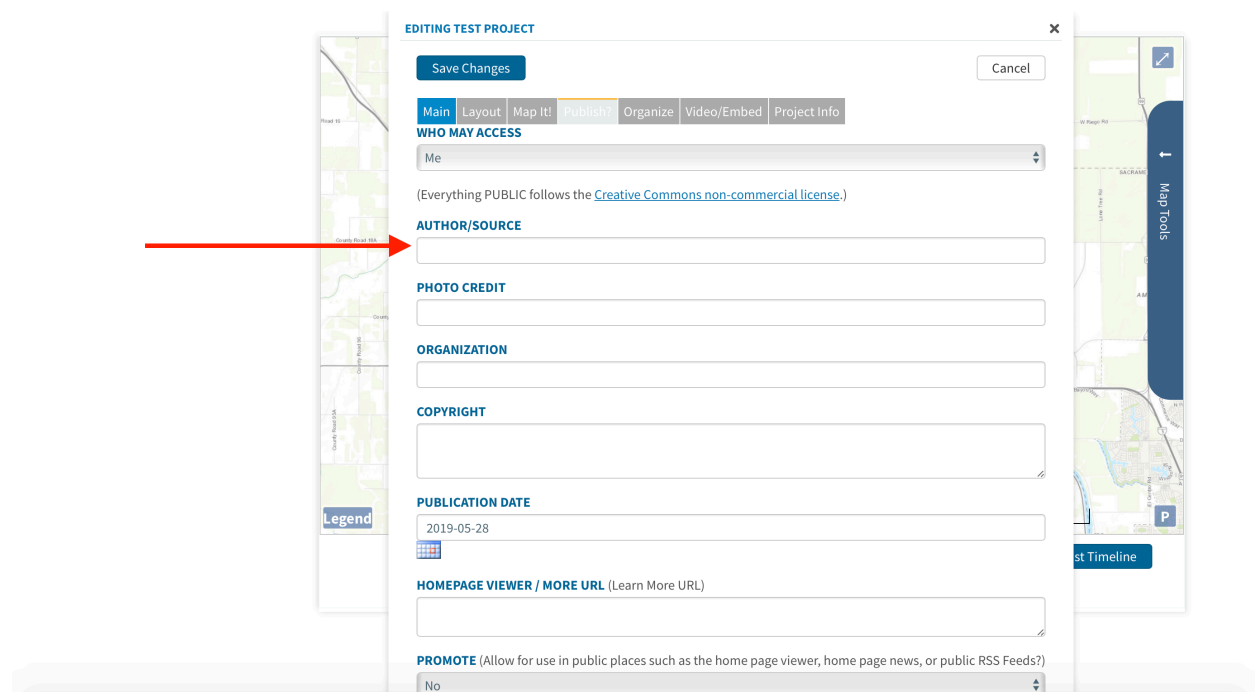
The first section is the “Who May Access” drop-down menu.



The screenshot shows the 'EDITING TEST PROJECT' dialog box. At the top, there are tabs: 'Main', 'Layout', 'Map It!', 'Publish!', 'Organize', 'Video/Embed', and 'Project Info'. Below the tabs is the 'WHO MAY ACCESS' section, which has a dropdown menu currently set to 'Me'. A red arrow points to this dropdown menu. Below the dropdown, there is a note: '(Everything PUBLIC follows the [Creative Commons non-commercial license.](#))'. Below this note are four text input fields labeled 'AUTHOR/SOURCE', 'PHOTO CREDIT', 'ORGANIZATION', and 'COPYRIGHT'.

You have two options here: “Me” and “PUBLIC/Everyone.” “Me” keeps the project private and “PUBLIC/Everyone” gives the public access to view your project page.

The next sections are the Author and the Organization information. If there are specific people to name for the project, put them in the Author or Source section.



The screenshot shows the 'EDITING TEST PROJECT' dialog box. The 'WHO MAY ACCESS' dropdown is still set to 'Me'. Below the 'AUTHOR/SOURCE' section, there are four text input fields labeled 'PHOTO CREDIT', 'ORGANIZATION', and 'COPYRIGHT'. Below these is a 'PUBLICATION DATE' section with a date picker set to '2019-05-28'. Below that is a 'HOMEPAGE VIEWER / MORE URL' section with a text input field. At the bottom is a 'PROMOTE' section with a dropdown menu set to 'No'. A red arrow points to the 'AUTHOR/SOURCE' text input field.

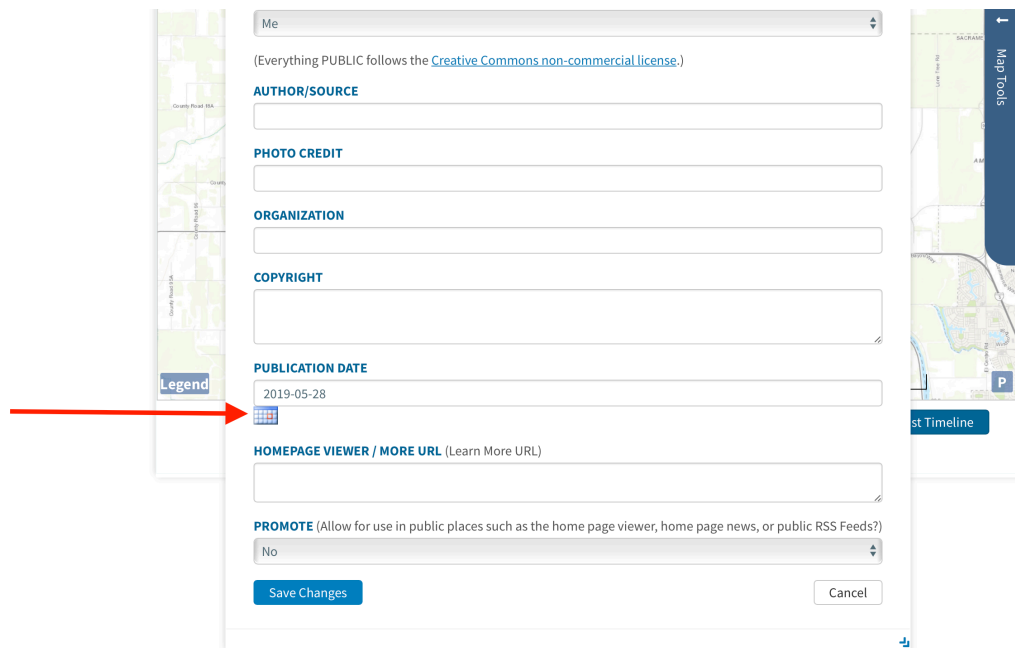
Then fill out the Organization section with the organizations and/or agencies involved in the project. Be sure to spell out the entire name of the organization.

The screenshot shows the 'EDITING TEST PROJECT' form. At the top, there are tabs: 'Main', 'Layout', 'Map It!', 'Publish', 'Organize', 'Video/Embed', and 'Project Info'. Below the tabs is a dropdown menu for 'WHO MAY ACCESS' with 'Me' selected. A note states: '(Everything PUBLIC follows the [Creative Commons non-commercial license.](#))'. The form has several sections with input fields: 'AUTHOR/SOURCE', 'PHOTO CREDIT', 'ORGANIZATION' (highlighted with a red arrow), 'COPYRIGHT', 'PUBLICATION DATE' (with a date of 2019-05-28), 'HOMEPAGE VIEWER / MORE URL' (with a link to 'Learn More URL'), and 'PROMOTE' (with a dropdown set to 'No'). The form is flanked by map panels on both sides.

Next, fill out any copyright information.

This screenshot is identical to the one above, showing the 'EDITING TEST PROJECT' form. In this view, a red arrow points to the 'COPYRIGHT' input field, which is currently empty. The 'ORGANIZATION' field is also empty. The rest of the form, including the tabs, dropdowns, and other input fields, remains the same.

Scroll down and choose a publication date by clicking on the calendar icon.
Choose a date on the calendar and the information will fill in the form.



This screenshot shows a web form for project information. The form includes fields for Author/Source, Photo Credit, Organization, Copyright, Publication Date, Homepage Viewer / More URL, and Promote. A red arrow points to the calendar icon in the Publication Date field, which is currently set to 2019-05-28. The form also has a 'Save Changes' button and a 'Cancel' button.

Me

(Everything PUBLIC follows the [Creative Commons non-commercial license.](#))

AUTHOR/SOURCE

PHOTO CREDIT

ORGANIZATION

COPYRIGHT

PUBLICATION DATE

2019-05-28

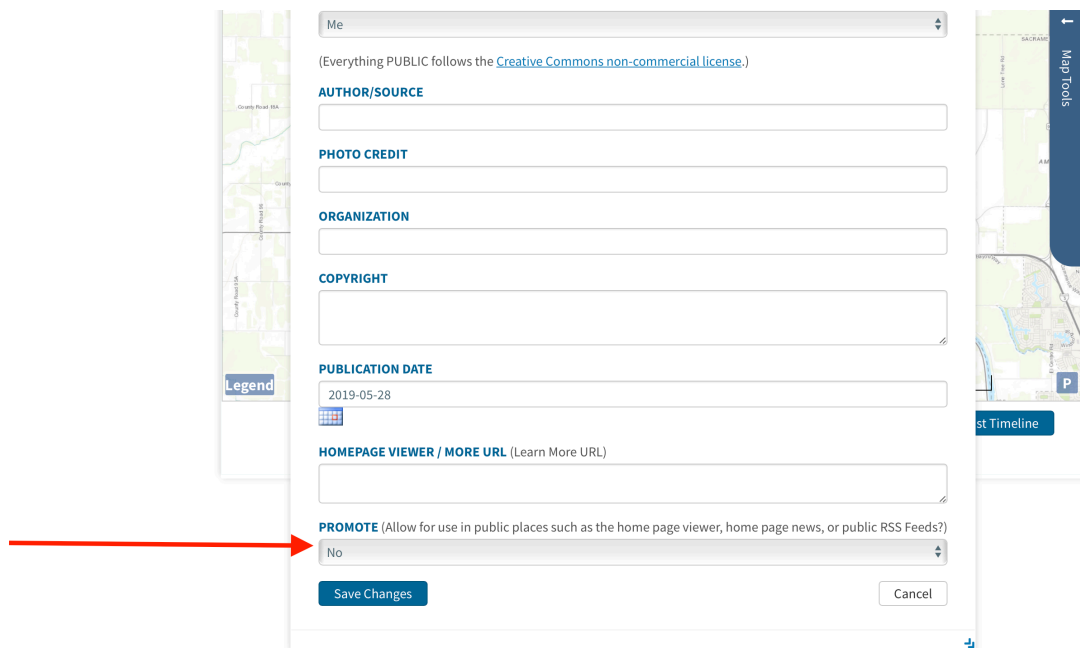
HOMEPAGE VIEWER / MORE URL (Learn More URL)

PROMOTE (Allow for use in public places such as the home page viewer, home page news, or public RSS Feeds?)

No

Save Changes Cancel

The “Promote” option allows you to indicate whether or not you want your project page to be used in public spaces on Bay-Delta Live, such as the “What’s New” section of the project library.



This screenshot shows the same web form as above, but with a red arrow pointing to the 'Promote' dropdown menu, which is currently set to 'No'. The form also has a 'Save Changes' button and a 'Cancel' button.

Me

(Everything PUBLIC follows the [Creative Commons non-commercial license.](#))

AUTHOR/SOURCE

PHOTO CREDIT

ORGANIZATION

COPYRIGHT

PUBLICATION DATE

2019-05-28

HOMEPAGE VIEWER / MORE URL (Learn More URL)

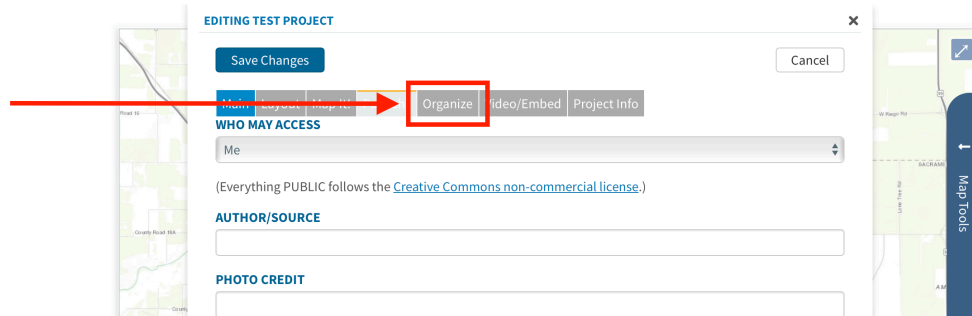
PROMOTE (Allow for use in public places such as the home page viewer, home page news, or public RSS Feeds?)

No

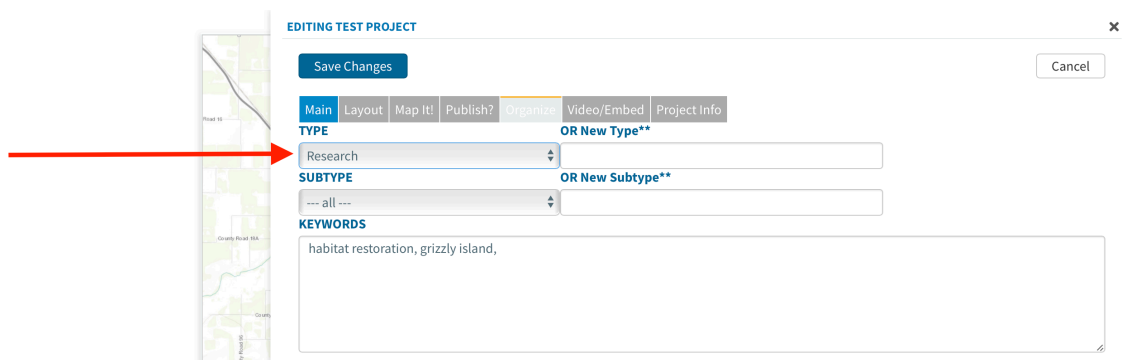
Save Changes Cancel

Keywords & Project Type

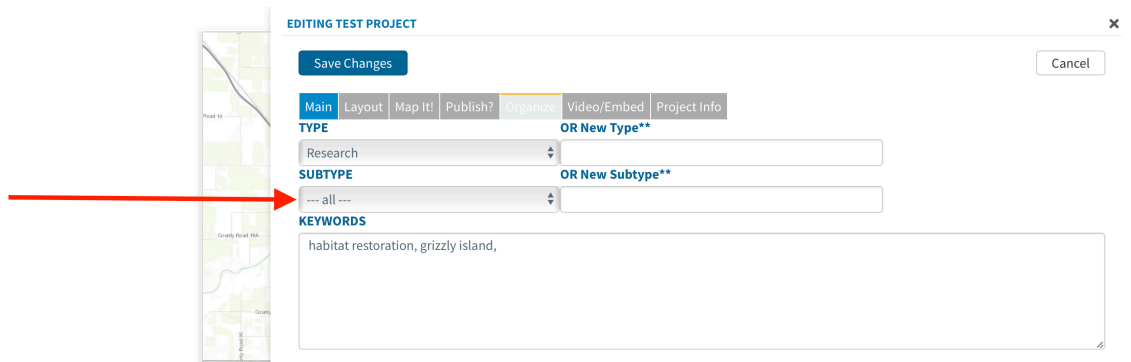
Next, go to the “Organize” tab.



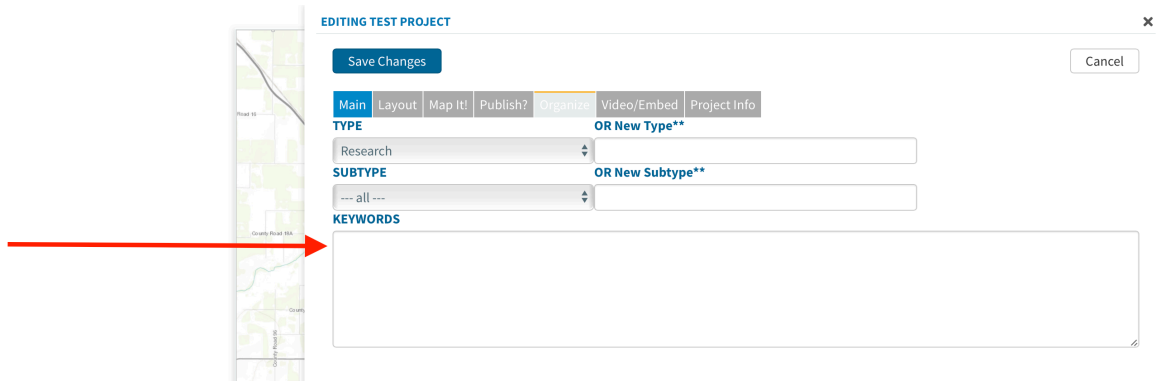
Choose a “Type” from the drop-down menu. People can search for projects by indicating a specific “Type” so this will help them find your project.
For example, if your project is a research project, choose that option from the drop-down menu.



You can also choose a “Subtype” from the second drop-down menu if one is applicable.



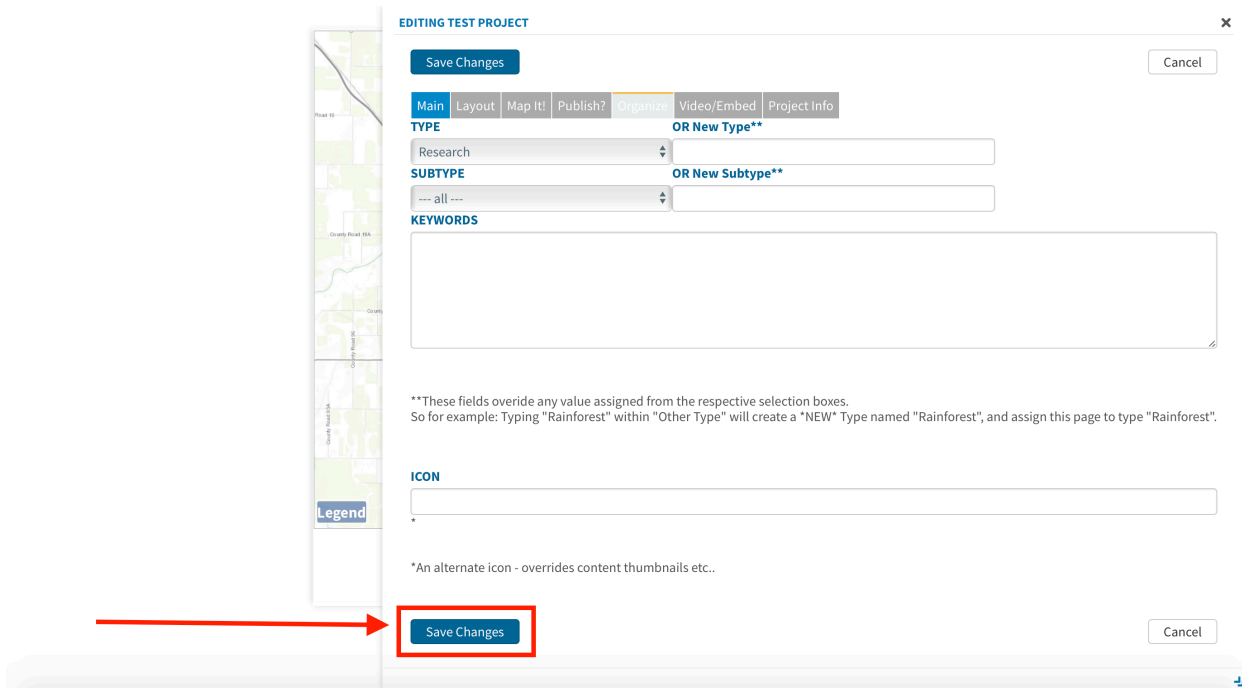
The next section is the “Keywords” section. This is where you will write any key terms associated with your project to optimize search capability. For instance, if you set “smelt” as one of the keywords your project will show up in the results when someone types “smelt” into the search box.



The screenshot shows the 'EDITING TEST PROJECT' window. On the left is a map. The main form has tabs: Main, Layout, Map It!, Publish?, Organize (selected), Video/Embed, and Project Info. Below the tabs are fields for TYPE (Research), SUBTYPE (--- all ---), and KEYWORDS (a large text area). A red arrow points to the KEYWORDS text area. At the top of the form are 'Save Changes' and 'Cancel' buttons.

Always Save Changes

When you are finished filling out the information in the metadata editor form, be sure to click “Save Changes.”



This screenshot shows the same 'EDITING TEST PROJECT' window, but with additional text and a highlighted button. Below the KEYWORDS text area, there is explanatory text: “**These fields override any value assigned from the respective selection boxes. So for example: Typing “Rainforest” within “Other Type” will create a “NEW” Type named “Rainforest”, and assign this page to type “Rainforest”.” Below this is an ICON field. At the bottom, there is a note: “*An alternate icon - overrides content thumbnails etc..”. A red arrow points to the 'Save Changes' button, which is highlighted with a red rectangle. The 'Cancel' button is also visible at the bottom right.

You can always access the metadata editor form by hovering over the Tools menu and choosing “Edit” from the drop-down menu.

The screenshot displays a web application interface. On the left, there is a map with a legend and a scale bar (2 mi). Above the map is a 'Privacy Settings' section with a dropdown menu set to 'Private', a 'Map Results' checkbox, a 'Clear' button, and a 'Search' button. To the right of the map, there is a 'Map Tools' sidebar. The main content area shows a grid of project listings. Each listing includes a title, a date, a category, and a 'View Project' button. A red arrow points to the 'Tools' button of the 'Test Project' listing, which has opened a dropdown menu. The dropdown menu contains the following options: View, Share, Map It, Edit (highlighted with a red box), Duplicate, Add to Basket, Empty Basket Here, Permalink, and Delete. At the bottom of the page, there is a 'Subscribe to this feed' link, a pagination bar showing 'Page 1 2 3 >', and a status bar indicating 'Showing 1 - 6 of 17 items'.

Privacy Settings
Private
Map Results Clear
Search Reset

Yolo Habitat Conservancy
[P]
Nov 14, 2019 01:33 PM
Preservation
View Project

[P]
Nov 14, 2019 12:59 PM
Education
View Project

Jacob Katz
[P]
Nov 14, 2019 12:54 PM
Education
View Project

Project Tools
Managed Agricultural Floodplain Habitat Investigation
Carson Jeffres
[P]
Nov 14, 2019 12:14 PM
Research
View Project

Project Tools
Test Project
Oct 18, 2019 10:33 AM
Research
View Project

Project Tools
View
Share
Map It
Edit
Duplicate
Add to Basket
Empty Basket Here
Permalink
Delete

Subscribe to this feed.

Page 1 2 3 >

Showing 1 - 6 of 17 items