

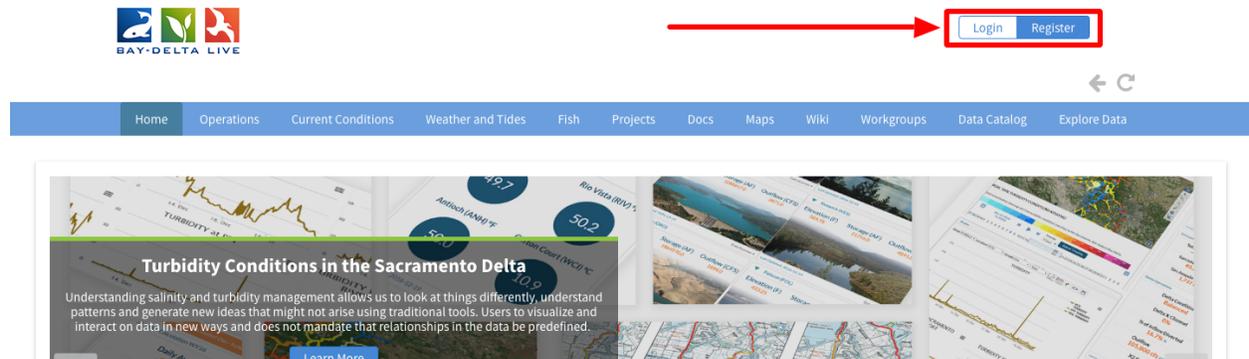
How to Edit the Metadata of Project Pages on Bay-Delta Live

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

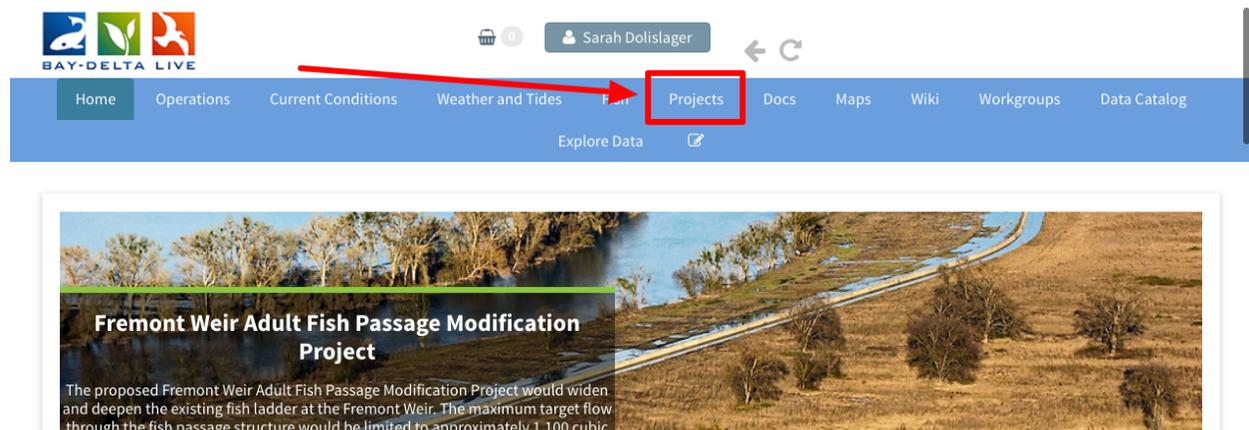
In this tutorial, we will go over how to edit the metadata of a project on Bay-Delta Live.

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

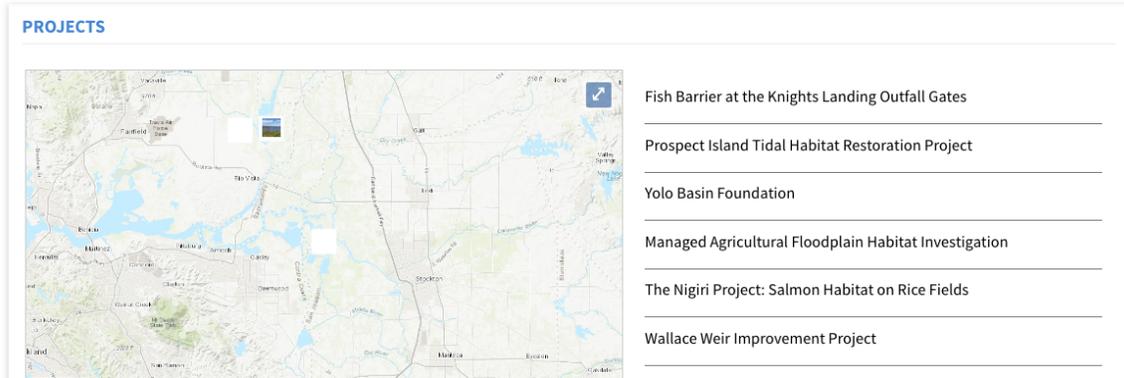
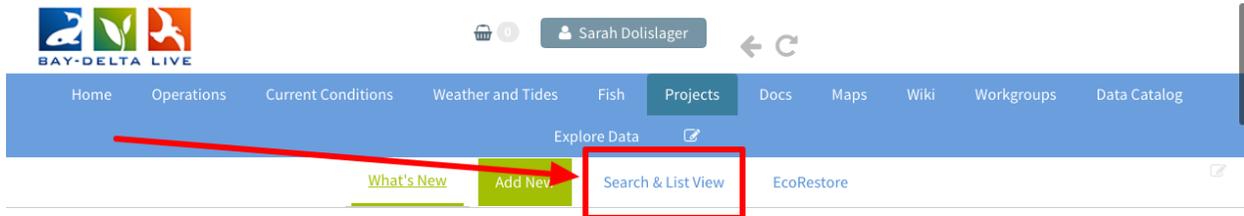
To begin, be sure you are logged in by using the “Login” button at the top of the screen.



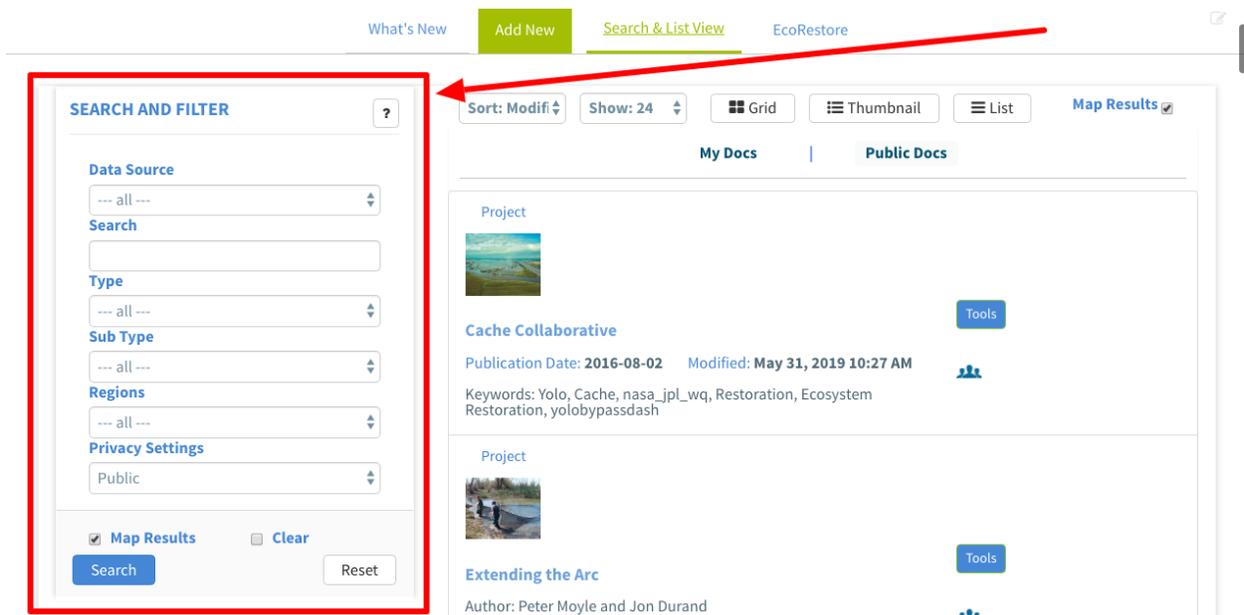
Once you are logged in, you can access the Project Library by clicking on the “Projects” link in the top bar.



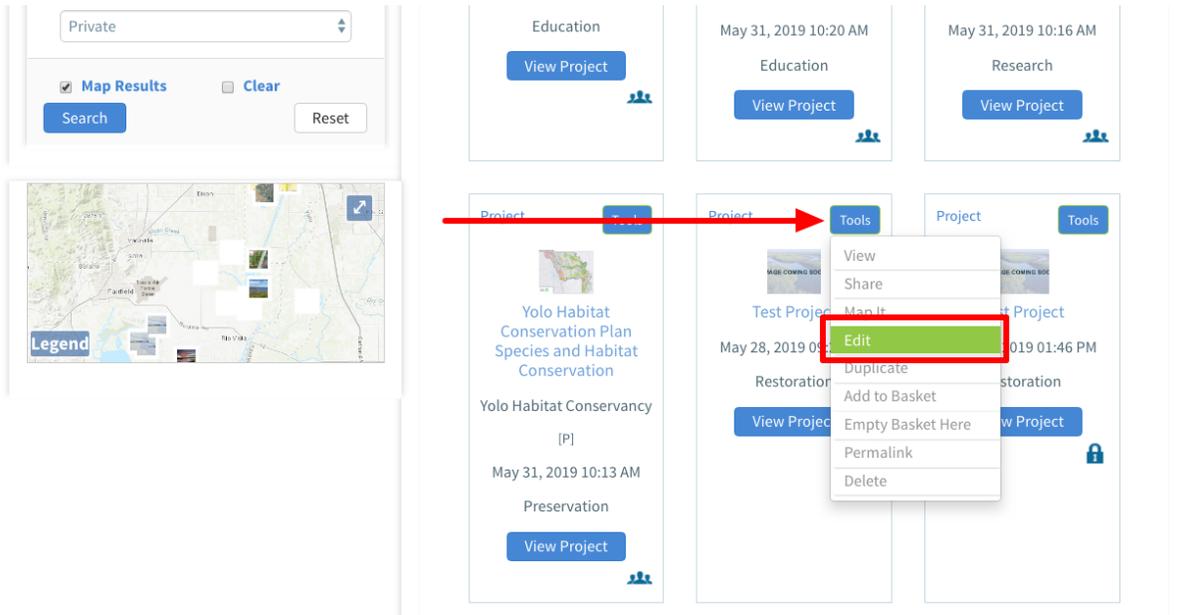
The Project Library will open to the “What’s New” page. To access and search the entire project library, click on “Search & List View” in the sub-navigation.



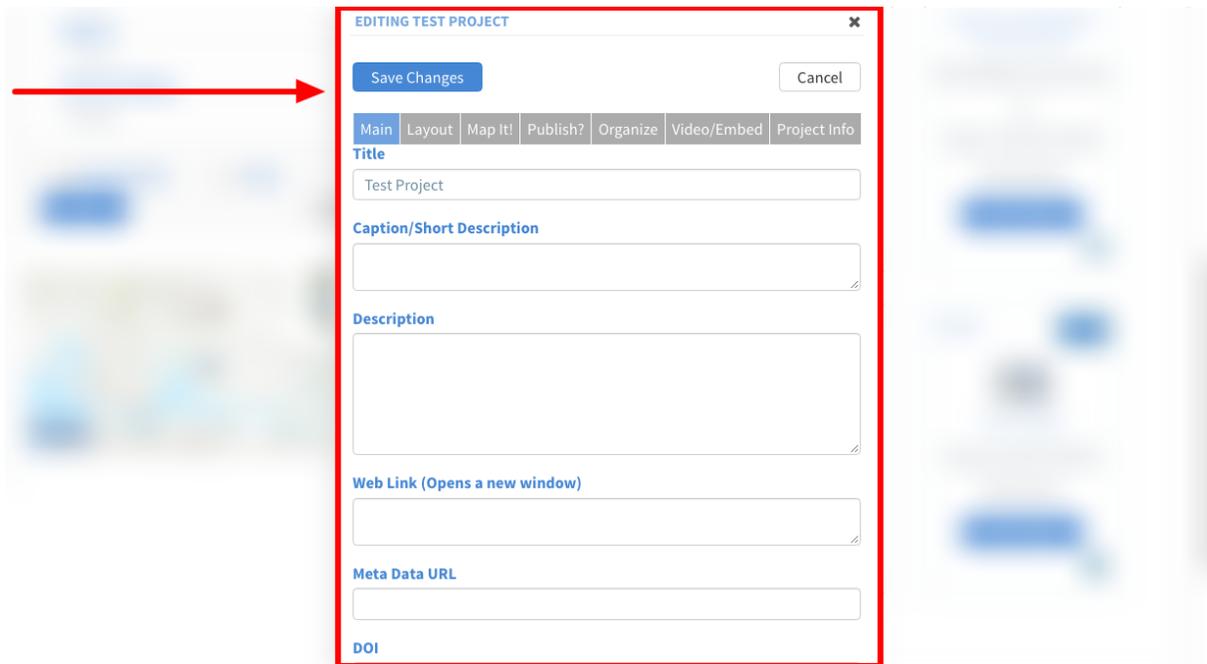
You can click through the project library or use the search function on the left-hand side.



Once you locate the project you want to edit, hover over the Tools menu and choose “Edit” from the drop-down menu.

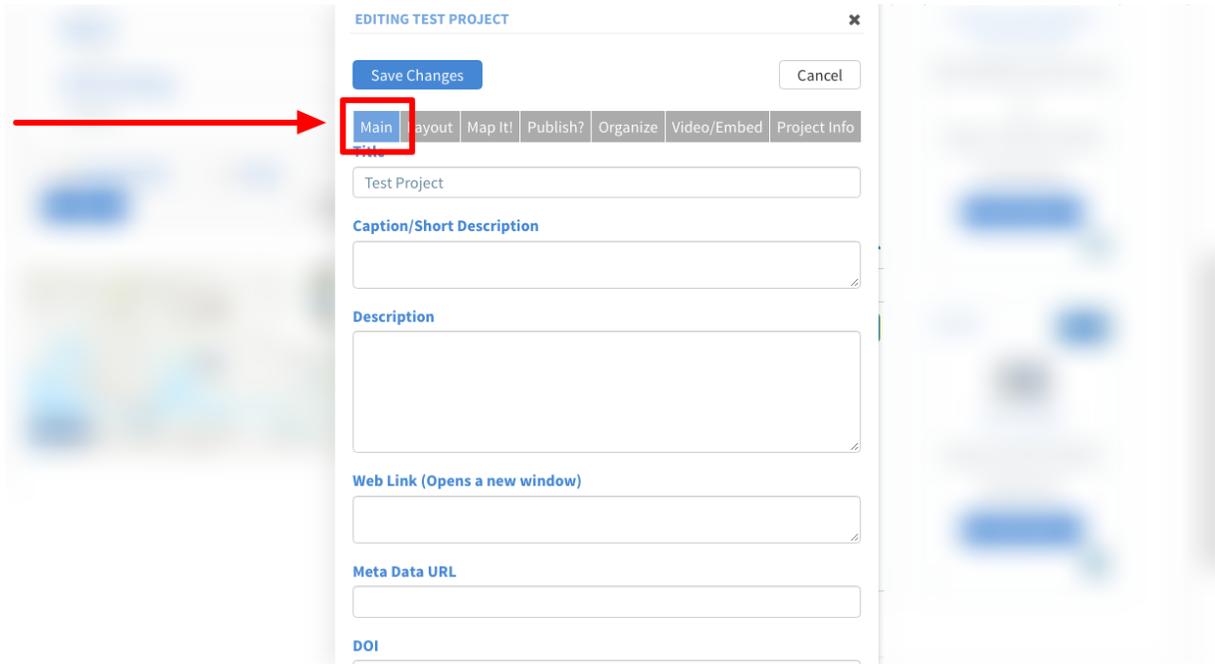


The metadata editor form pops up. This form contains all the project’s metadata.

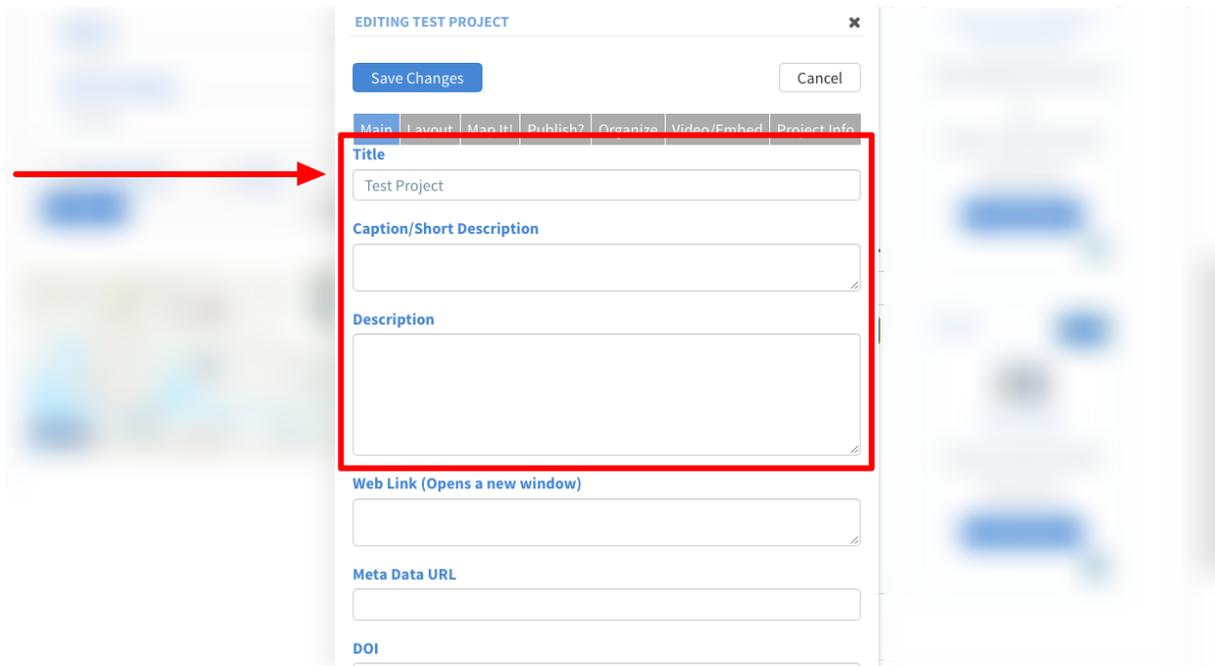


Let’s go through the options in each tab of the Editor form.

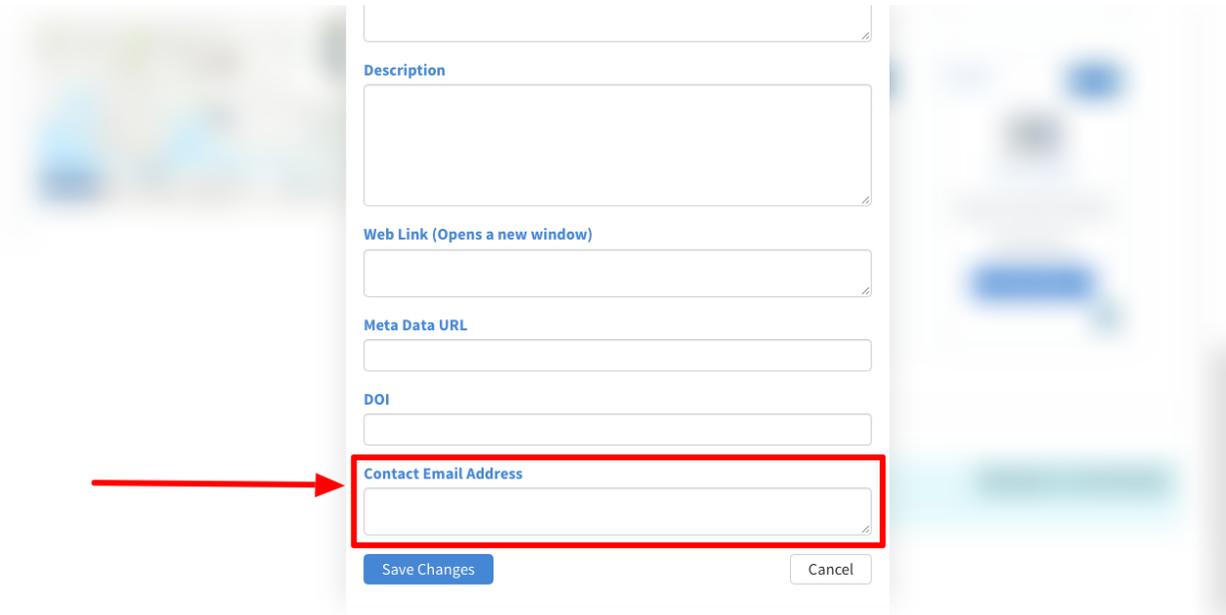
First, the Main Tab.



This is where you will enter a project's Title and Description. These two sections are important because the search function uses these words as keywords when other users search for the project library.

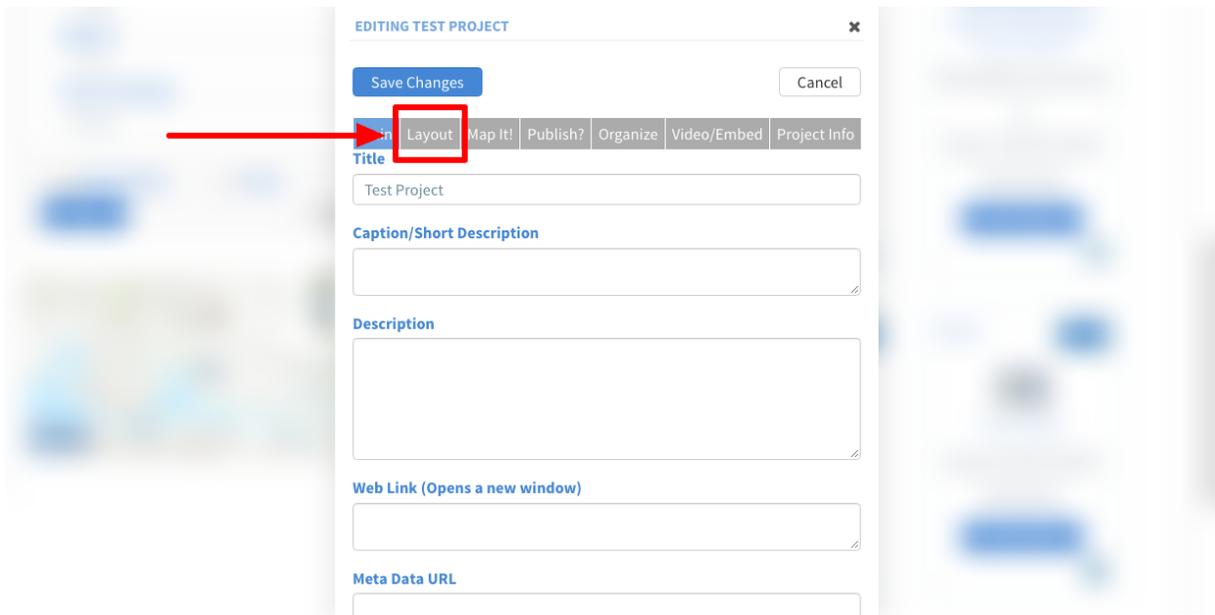


Another important section of the Main Tab is the Contact Information for the project. Be sure to include the phone number or email address for the project contact here. This information will populate on the “Recent Activity” page of the project.



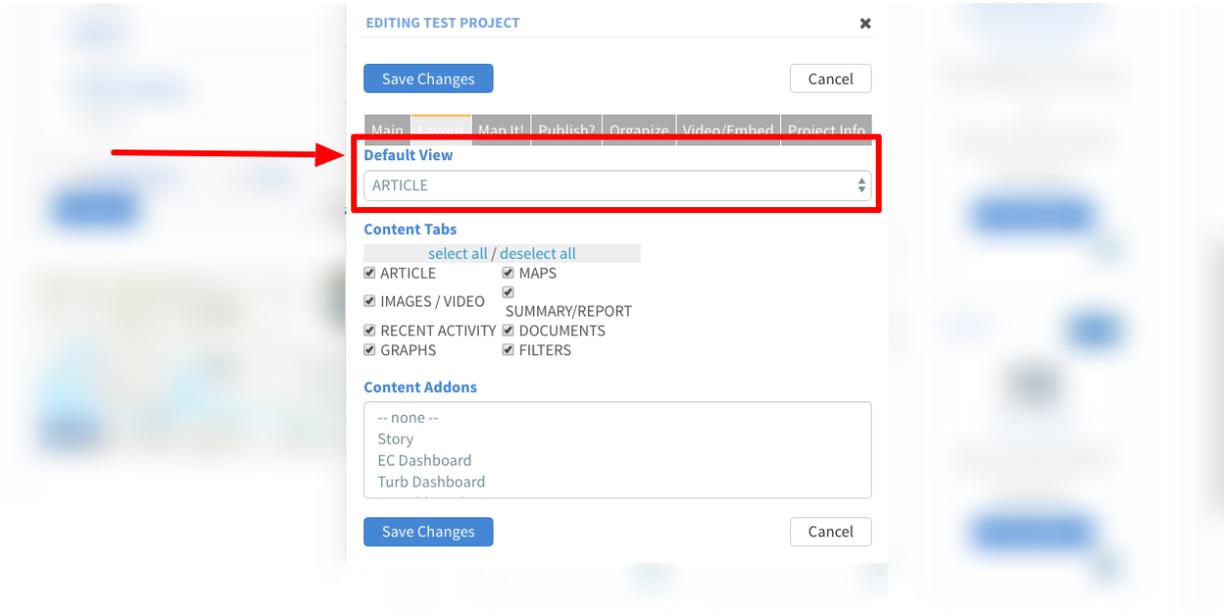
This screenshot shows a portion of a project form. The fields visible are: Description, Web Link (Opens a new window), Meta Data URL, DOI, and Contact Email Address. The 'Contact Email Address' field is highlighted with a red rectangular box, and a red arrow points to it from the left. Below the fields are 'Save Changes' and 'Cancel' buttons.

The next tab is the “Layout” tab.



This screenshot shows the 'EDITING TEST PROJECT' form. At the top, there are 'Save Changes' and 'Cancel' buttons. Below them is a tabbed interface with tabs for 'Main', 'Layout', 'Map It!', 'Publish?', 'Organize', 'Video/Embed', and 'Project Info'. The 'Layout' tab is highlighted with a red rectangular box, and a red arrow points to it from the left. Below the tabs, the form contains fields for Title (containing 'Test Project'), Caption/Short Description, Description, Web Link (Opens a new window), and Meta Data URL.

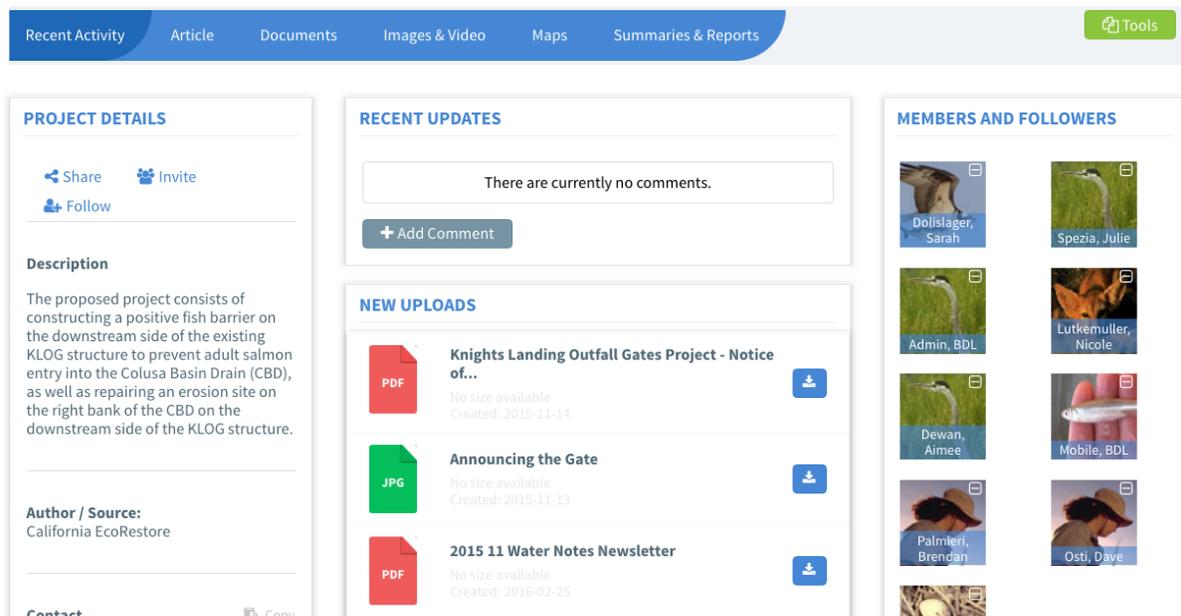
The Default View drop-down menu includes all the page options of a project. Choose the one you would like to have as the landing page for your project.



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

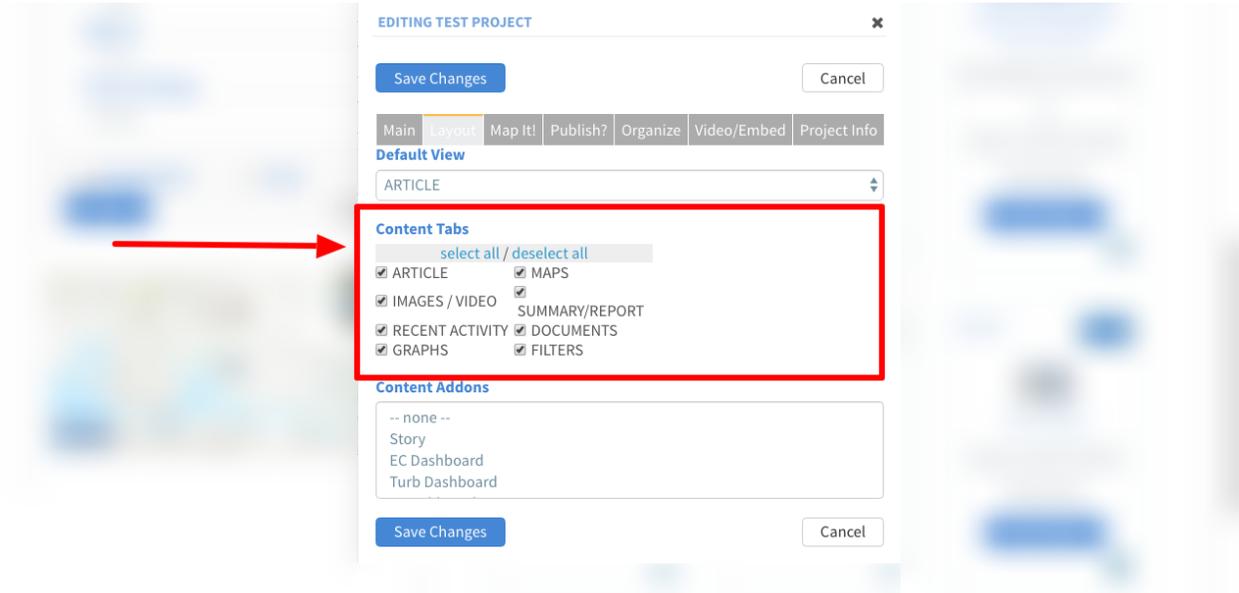
“Recent Activity” is also a good option because it shows information like the project members, description, contact information, and recent uploaded documents.

“Recent Activity” page example:

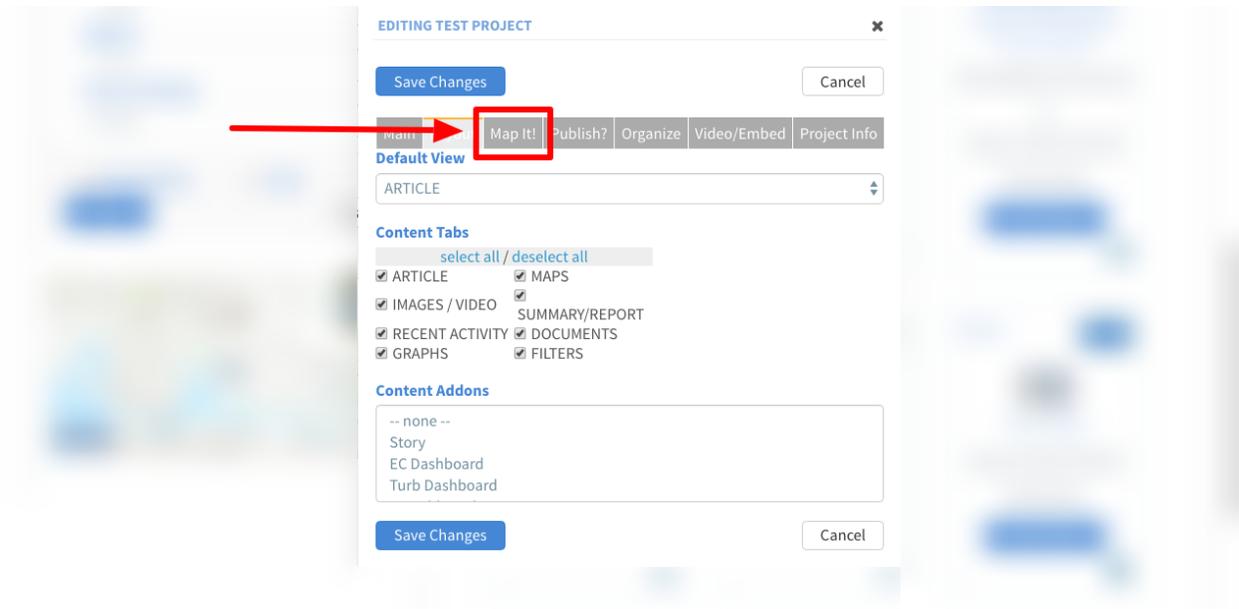


You can always come back and edit this later.

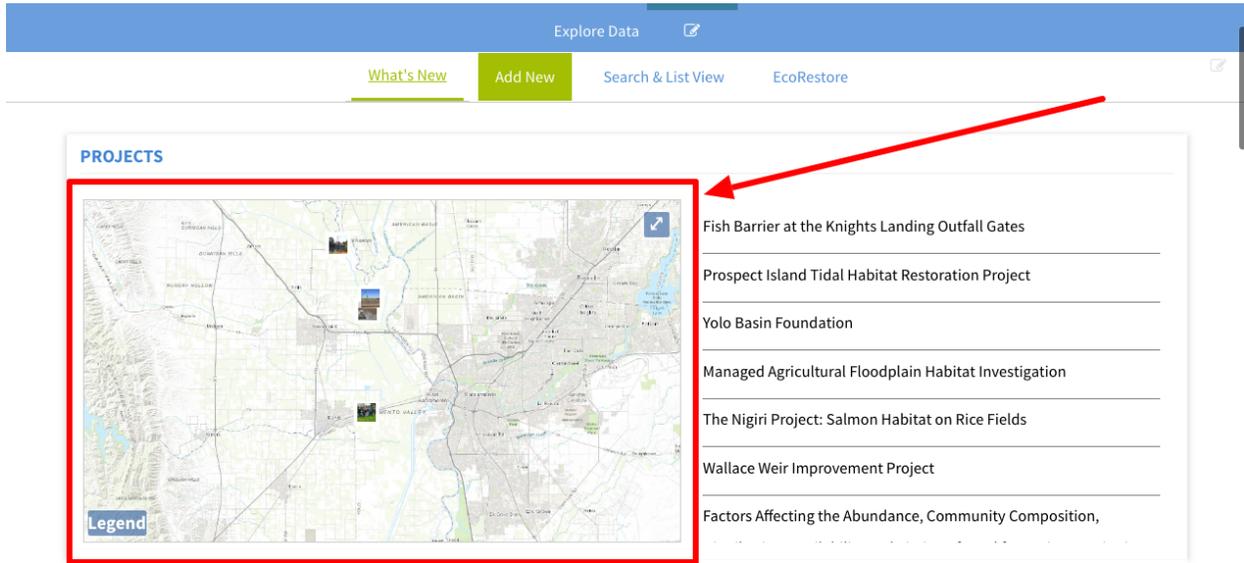
Content Tabs gives you options for pages in your project. You can select or deselect pages based on how you want to build your project. If you are not sure which pages you would like to use, keep them all selected and come back to edit this section later.



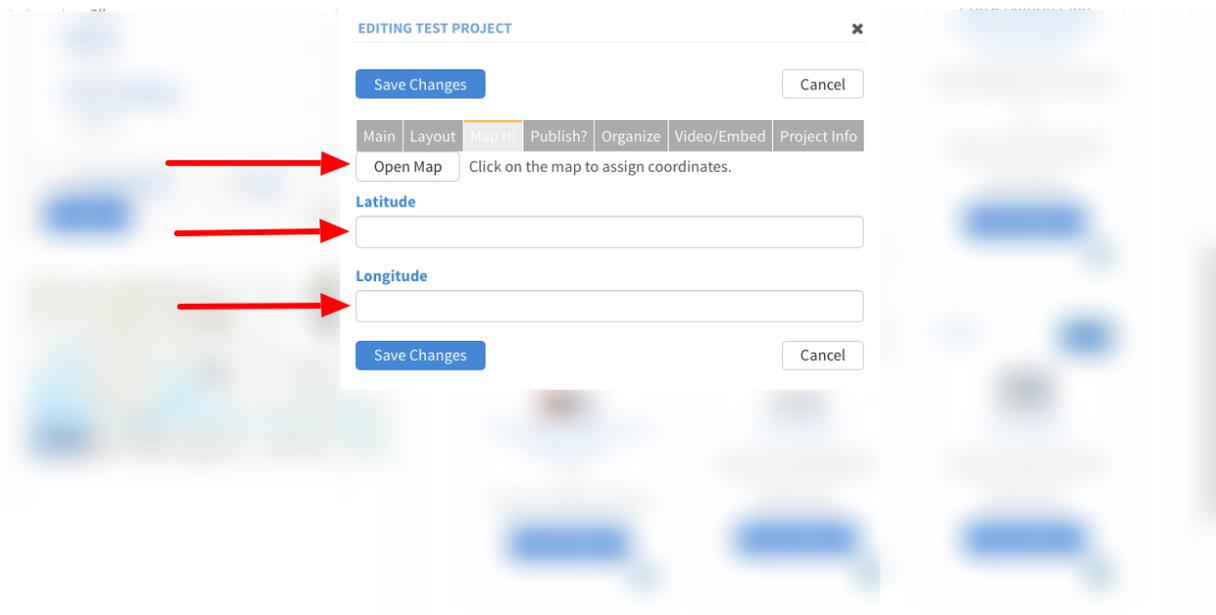
Next, go to the "Map It" tab.



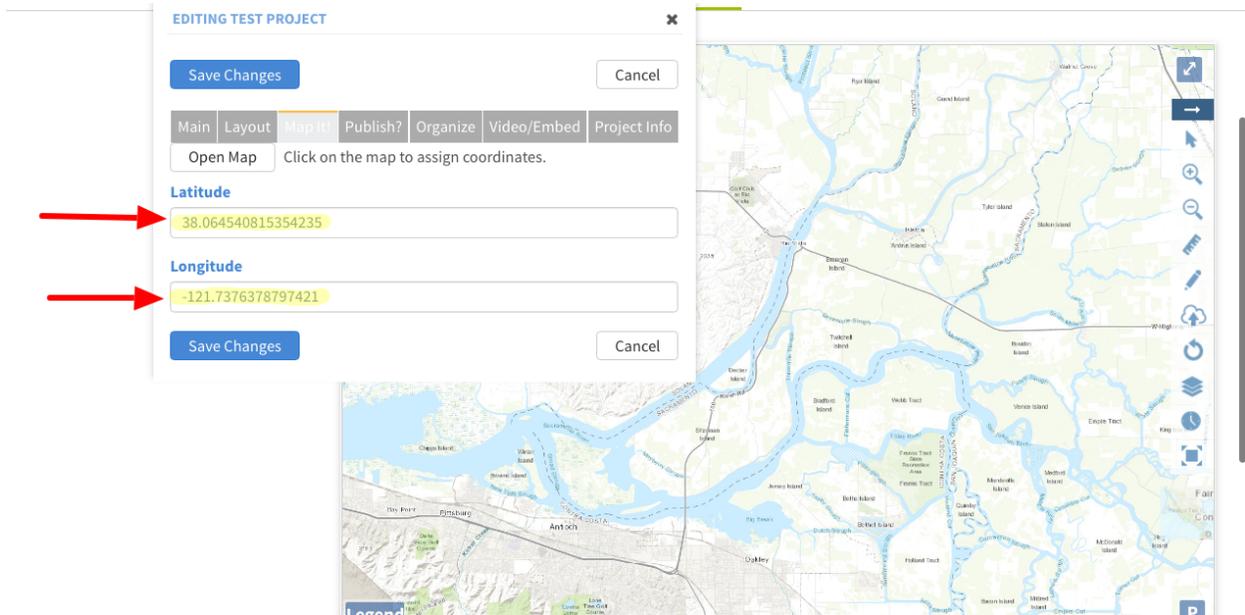
This function assigns coordinates to your project so it can be viewed on a map, as well as located when the map search function is used. For example, the project library map:



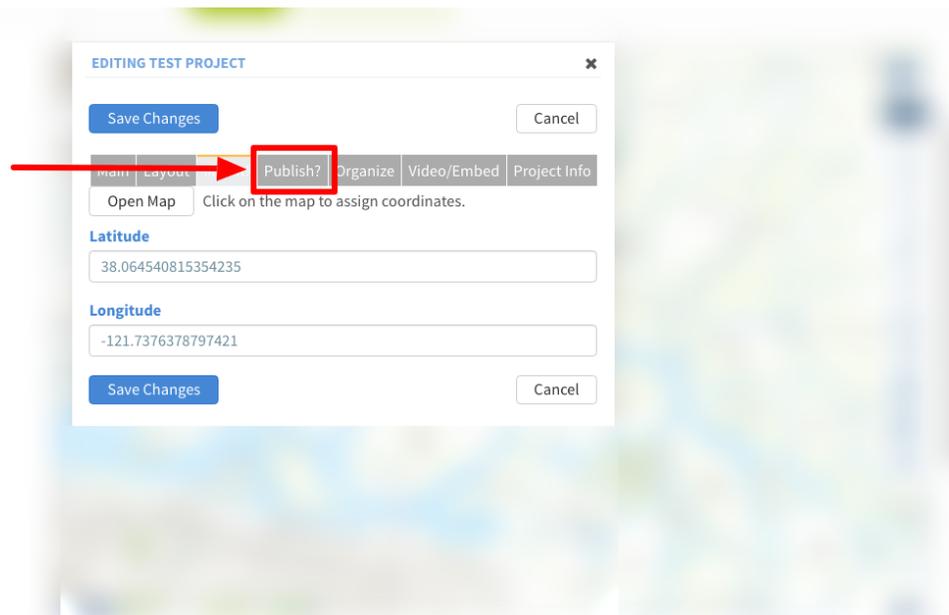
Enter the Latitude and Longitude or Click the "Open Map" button to select a point on the map.



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



Next, go to the "Publish" tab.



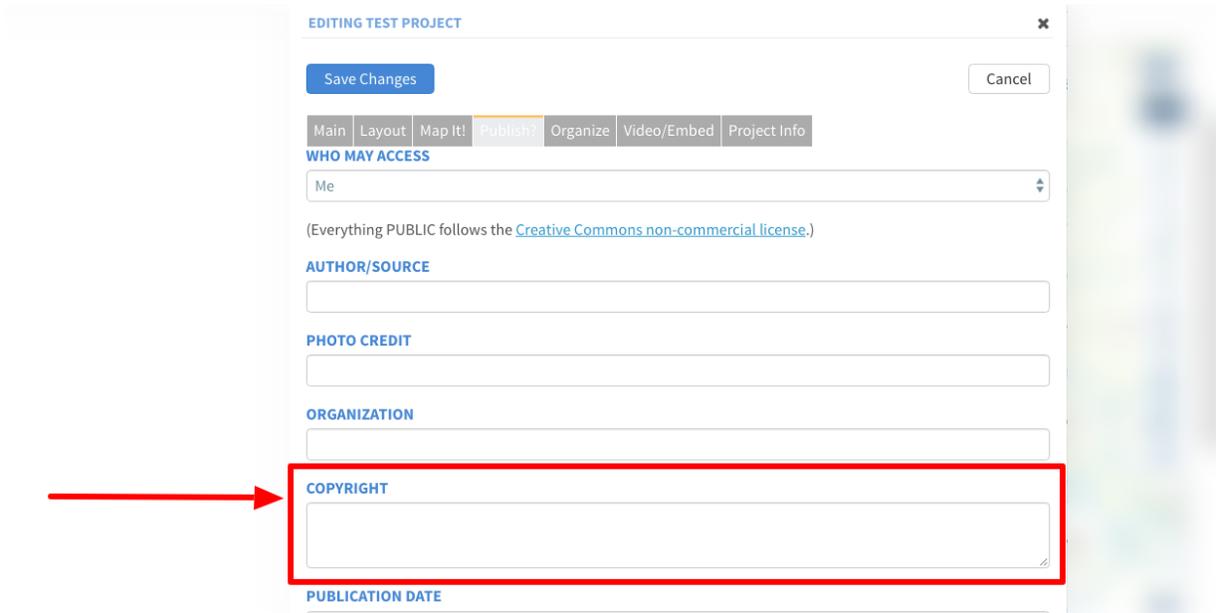
The first section is the “Who May Access” drop-down menu. You have two options here: “Me” and “PUBLIC/Everyone.” “Me” keeps the project private and “PUBLIC/Everyone” gives the public access to view your project page. Choose one.

The screenshot shows the 'EDITING TEST PROJECT' interface. At the top, there are 'Save Changes' and 'Cancel' buttons. Below them is a navigation bar with tabs: 'Main', 'Layout', 'Map It!', 'Publish?', 'Organize', 'Video/Embed', and 'Project Info'. The 'Publish?' tab is active. Below the navigation bar, the 'WHO MAY ACCESS' section is highlighted with a red box and a red arrow pointing to it. The dropdown menu is currently set to 'Me'. Below this, there is a note: '(Everything PUBLIC follows the [Creative Commons non-commercial license.](#))'. Further down, there are sections for 'AUTHOR/SOURCE', 'PHOTO CREDIT', 'ORGANIZATION', 'COPYRIGHT', and 'PUBLICATION DATE', each with an empty text input field.

The next sections are the Author/Source and the Organization information. If there are specific people to name for the project, put them in Author/Source. Then fill out the Organization section with the organizations and/or agencies involved in project. Be sure to spell out the entire name of the organization.

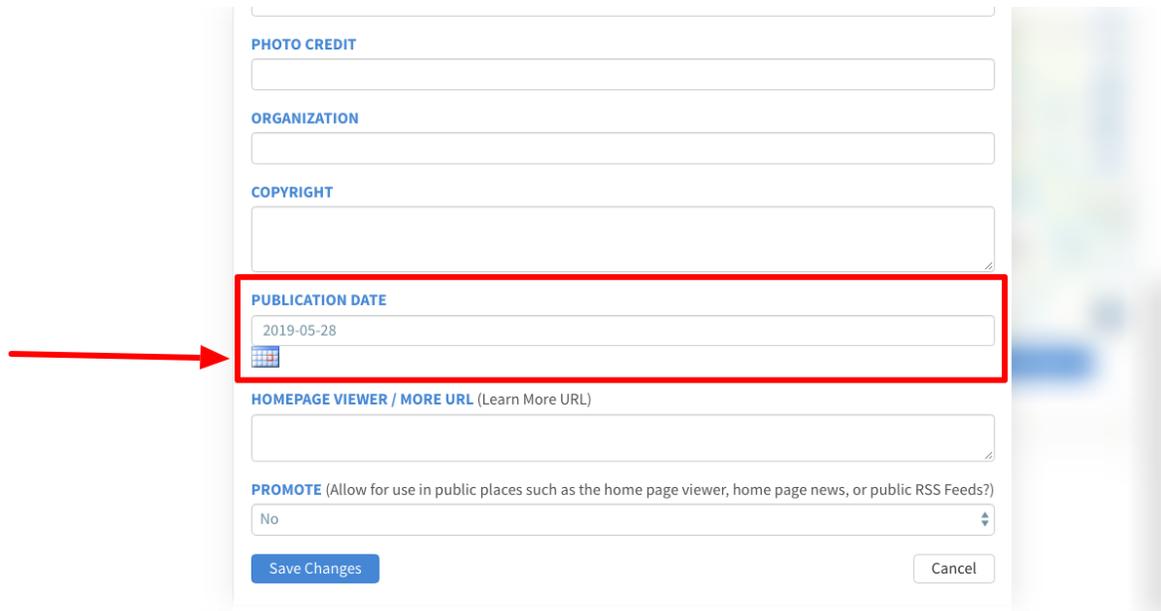
This screenshot is similar to the one above, but with two additional red boxes and arrows. The 'AUTHOR/SOURCE' section is highlighted with a red box and a red arrow pointing to it. Below it, the 'ORGANIZATION' section is also highlighted with a red box and a red arrow pointing to it. The 'WHO MAY ACCESS' dropdown is still set to 'Me'. The rest of the form, including the 'PHOTO CREDIT', 'COPYRIGHT', and 'PUBLICATION DATE' sections, remains the same as in the previous screenshot.

Next, fill out any copyright information.



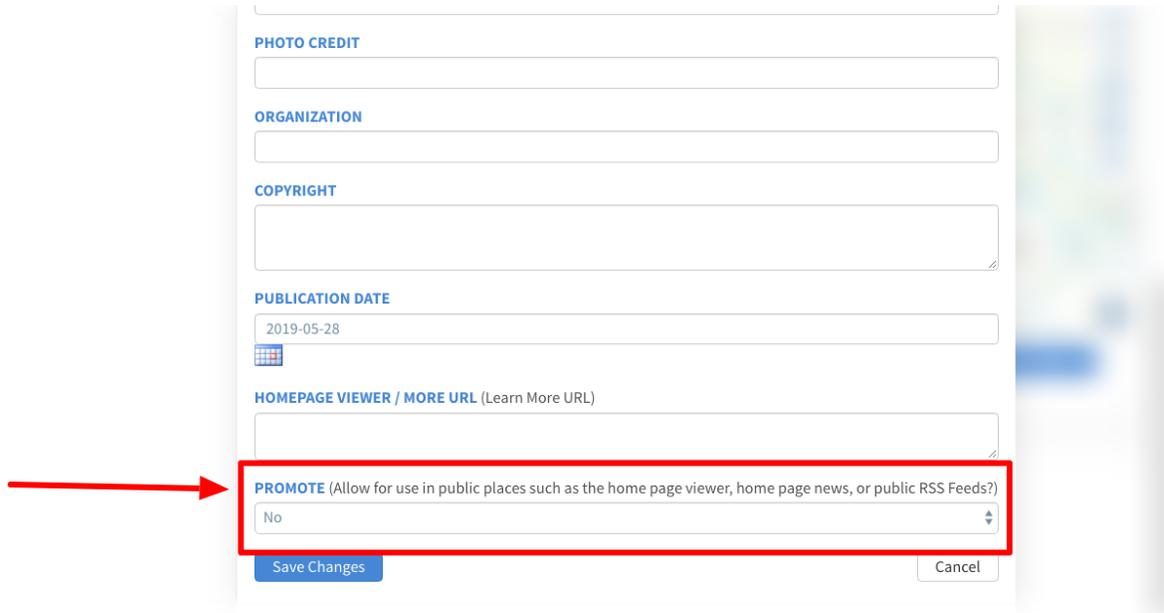
The screenshot shows the 'EDITING TEST PROJECT' interface. At the top, there are tabs for 'Main', 'Layout', 'Map It!', 'Publish!', 'Organize', 'Video/Embed', and 'Project Info'. Below the tabs, there are sections for 'WHO MAY ACCESS' (set to 'Me'), 'AUTHOR/SOURCE', 'PHOTO CREDIT', and 'ORGANIZATION'. The 'COPYRIGHT' section is highlighted with a red box, and a red arrow points to it from the left. Below 'COPYRIGHT' is the 'PUBLICATION DATE' section.

You can choose a publication date by clicking on the calendar icon. The calendar will pop up so you can choose a date and it will auto-fill.



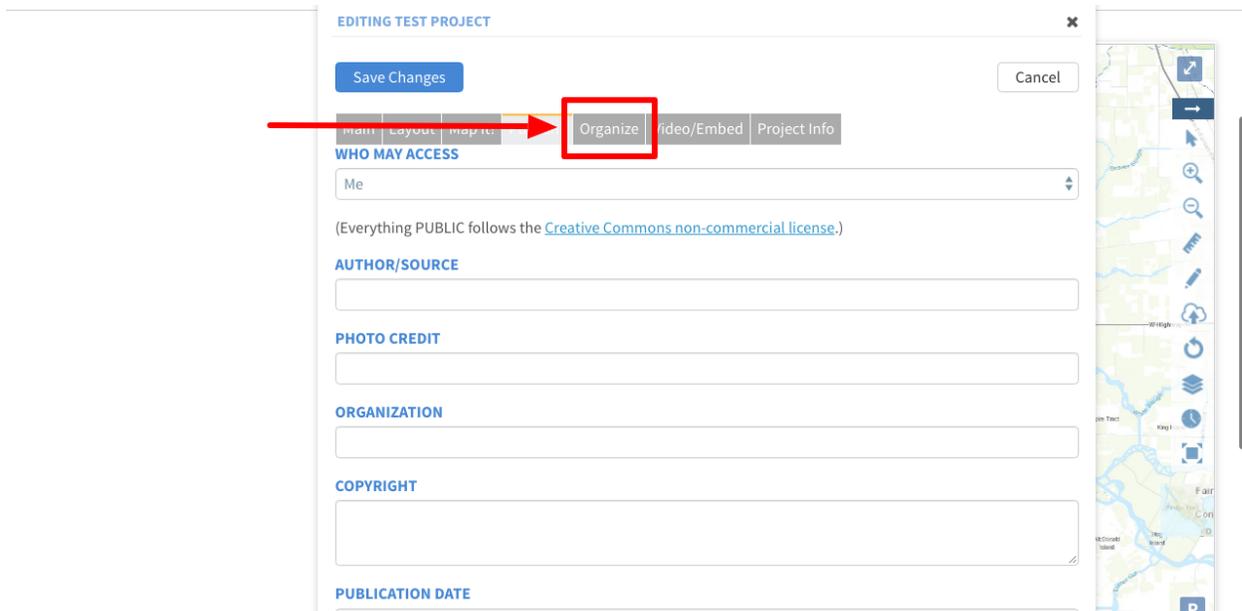
This screenshot shows the 'PUBLICATION DATE' section of the form. The date '2019-05-28' is entered in the text field, and a small calendar icon is visible to its left. A red box highlights the entire 'PUBLICATION DATE' section, and a red arrow points to the calendar icon from the left. Below this section are fields for 'HOMEPAGE VIEWER / MORE URL' and 'PROMOTE' (set to 'No').

If you'd like to promote your project on BDL's homepage or the "What's New" section of the Project Library, choose "yes" or a specific option from the drop-down menu.



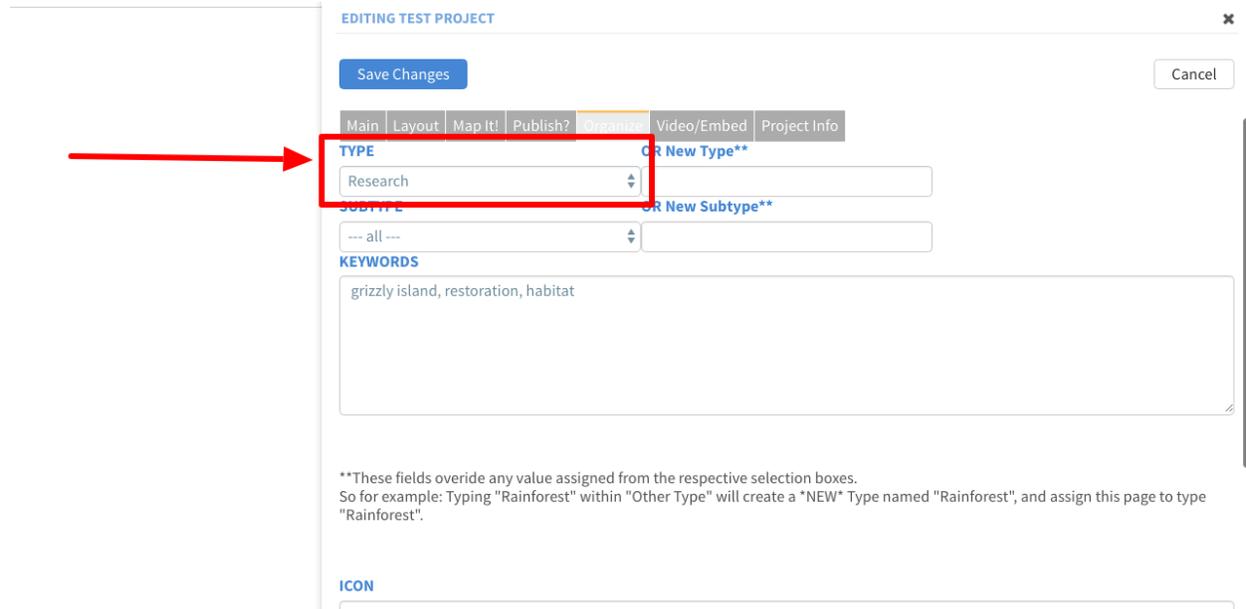
A screenshot of a web form for editing a project. The form contains several sections: PHOTO CREDIT, ORGANIZATION, COPYRIGHT, PUBLICATION DATE (with a date picker showing 2019-05-28), and HOMEPAGE VIEWER / MORE URL (with a link to 'Learn More URL'). The 'PROMOTE (Allow for use in public places such as the home page viewer, home page news, or public RSS Feeds?)' dropdown menu is highlighted with a red box and a red arrow pointing to it. The dropdown currently shows 'No'. Below the dropdown are 'Save Changes' and 'Cancel' buttons.

Next, go to the "Organize" tab.



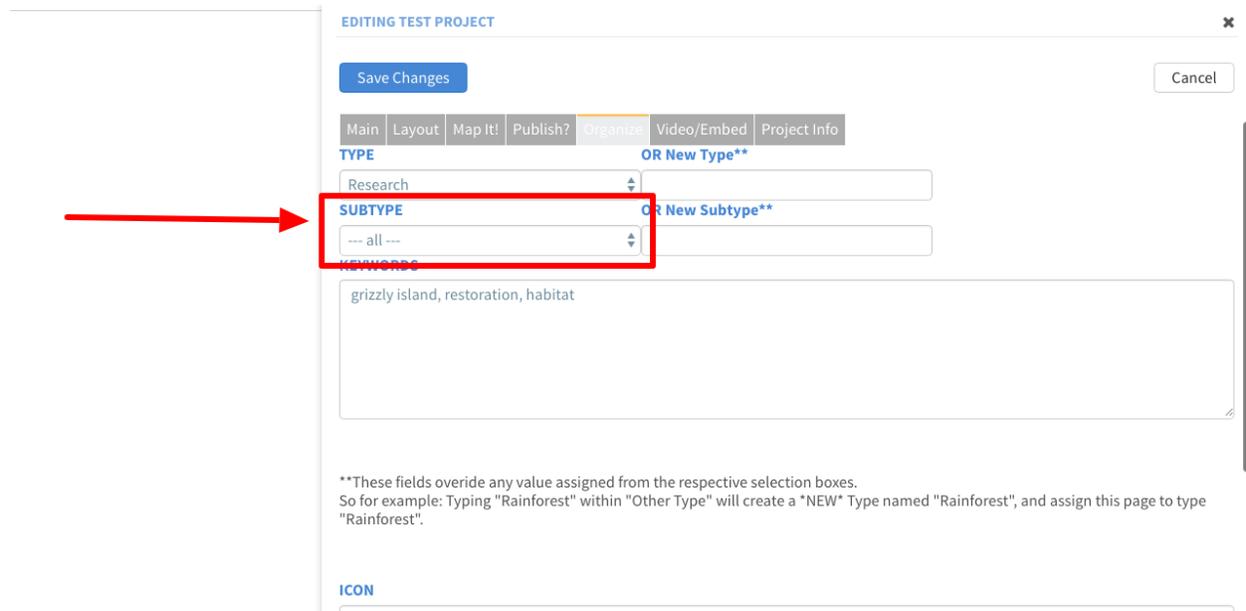
A screenshot of the 'EDITING TEST PROJECT' interface. At the top, there are 'Save Changes' and 'Cancel' buttons. Below them is a navigation bar with tabs: 'main', 'Layout', 'map it', 'Organize', 'Video/Embed', and 'Project Info'. The 'Organize' tab is highlighted with a red box and a red arrow pointing to it. Below the navigation bar, the 'WHO MAY ACCESS' dropdown is set to 'Me'. A note states: '(Everything PUBLIC follows the [Creative Commons non-commercial license](#).)'. Below this are sections for AUTHOR/SOURCE, PHOTO CREDIT, ORGANIZATION, COPYRIGHT, and PUBLICATION DATE, each with an empty text input field. On the right side of the interface, there is a vertical map viewer with various navigation icons.

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.



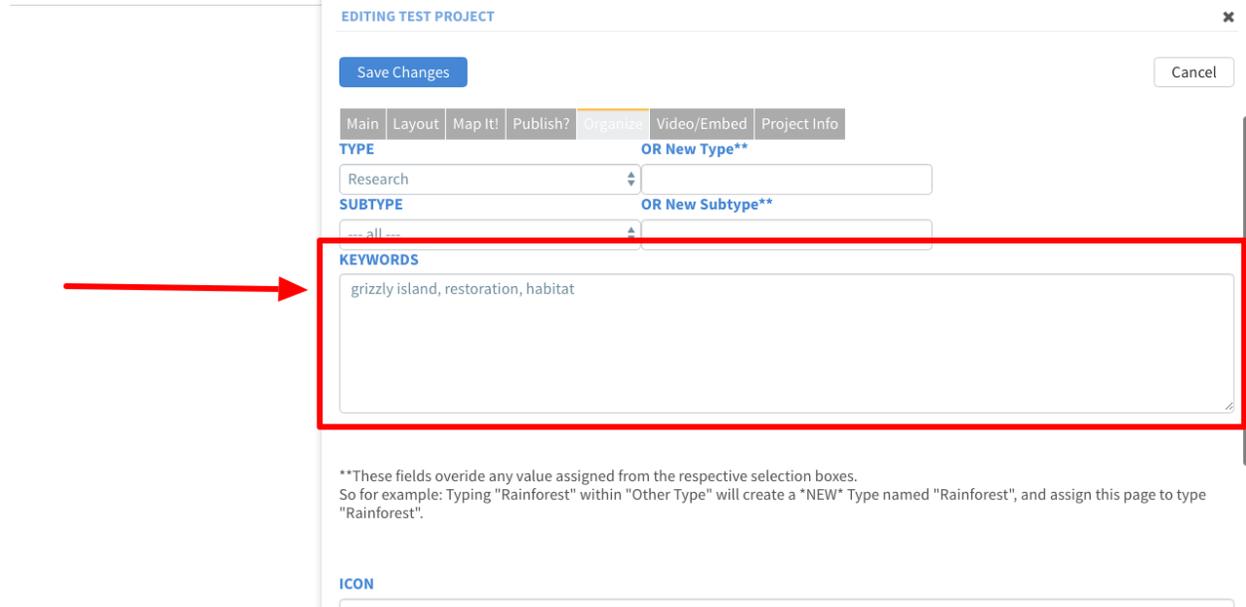
The screenshot shows the 'EDITING TEST PROJECT' interface. At the top, there are tabs for 'Main', 'Layout', 'Map It!', 'Publish?', 'Organize', 'Video/Embed', and 'Project Info'. Below the tabs, there are two dropdown menus. The first is labeled 'TYPE' and has 'Research' selected. A red arrow points to this dropdown. The second dropdown is labeled 'SUBTYPE' and has '--- all ---' selected. Below these are 'KEYWORDS' and 'ICON' sections. A note at the bottom explains that these fields override values from selection boxes and provides an example: 'Typing "Rainforest" within "Other Type" will create a *NEW* Type named "Rainforest", and assign this page to type "Rainforest".'

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



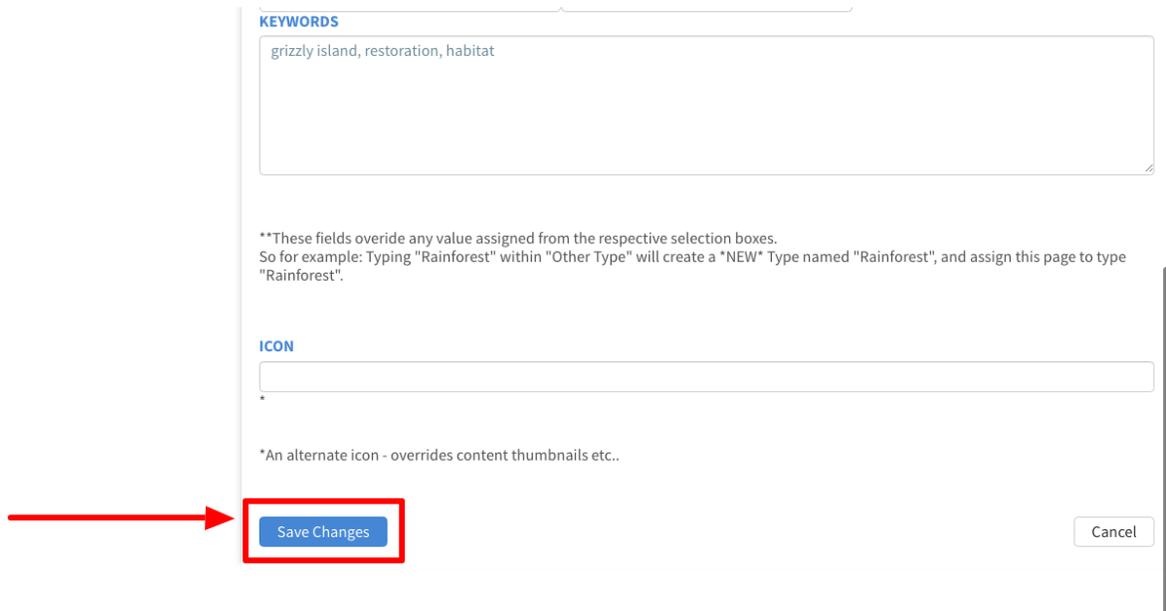
This screenshot is identical to the one above, but the red arrow now points to the 'SUBTYPE' dropdown menu, which has '--- all ---' selected. The 'TYPE' dropdown remains highlighted with a red box.

The next section is the “Keywords” section. This is where you will write any words that pertain to 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' interface. At the top, there are tabs for 'Main', 'Layout', 'Map It!', 'Publish?', 'Organize', 'Video/Embed', and 'Project Info'. Below the tabs are fields for 'TYPE' (with a dropdown menu showing 'Research') and 'SUBTYPE' (with a dropdown menu showing '--- all ---'). The 'KEYWORDS' section is highlighted with a red box and a red arrow pointing to it from the left. The text 'grizzly island, restoration, habitat' is entered in the keywords field. Below the keywords field, there is a note: '**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 note is the 'ICON' section, which is currently empty.

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



This screenshot shows a close-up of the 'KEYWORDS' section of the form. The text 'grizzly island, restoration, habitat' is visible in the text area. Below the text area is the same explanatory note as in the previous screenshot. Below the note is the 'ICON' section, which is empty. At the bottom of the form, the 'Save Changes' button is highlighted with a red box and a red arrow pointing to it from the left. The 'Cancel' button is also visible to the right of the 'Save Changes' button.

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

