

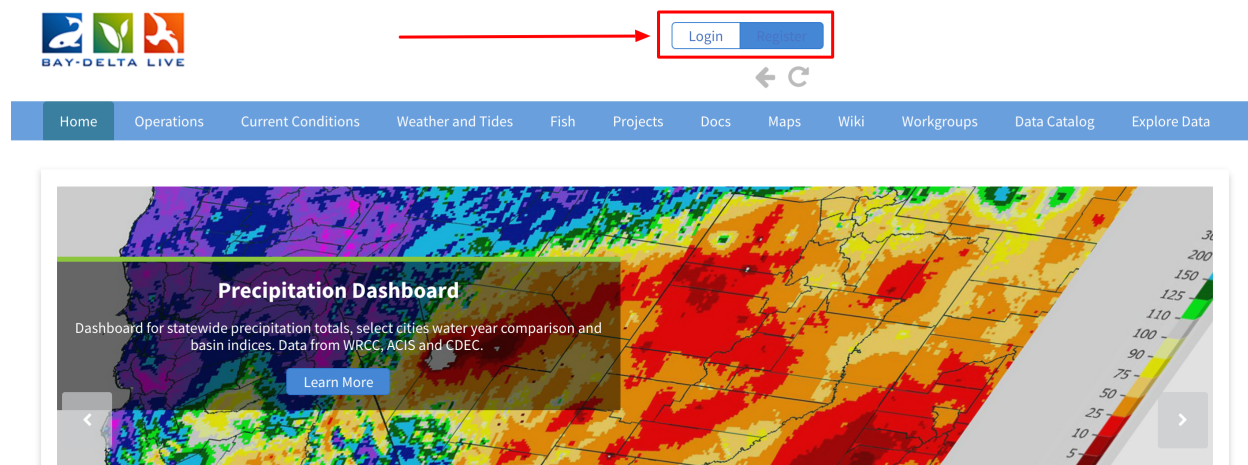
How to Make Assets Searchable on Bay-Delta Live

Welcome to the Make Assets Searchable Tutorial.

In this tutorial, we will go through:

- three different ways people can search for files or projects in the Bay-Delta Live database and;
- how to edit the metadata of files or projects to correlate with these three search options.

Before working in Bay-Delta Live, be sure to login by using the log-in button at the top of the screen.



Every Bay-Delta Live asset library has built-in search functions.

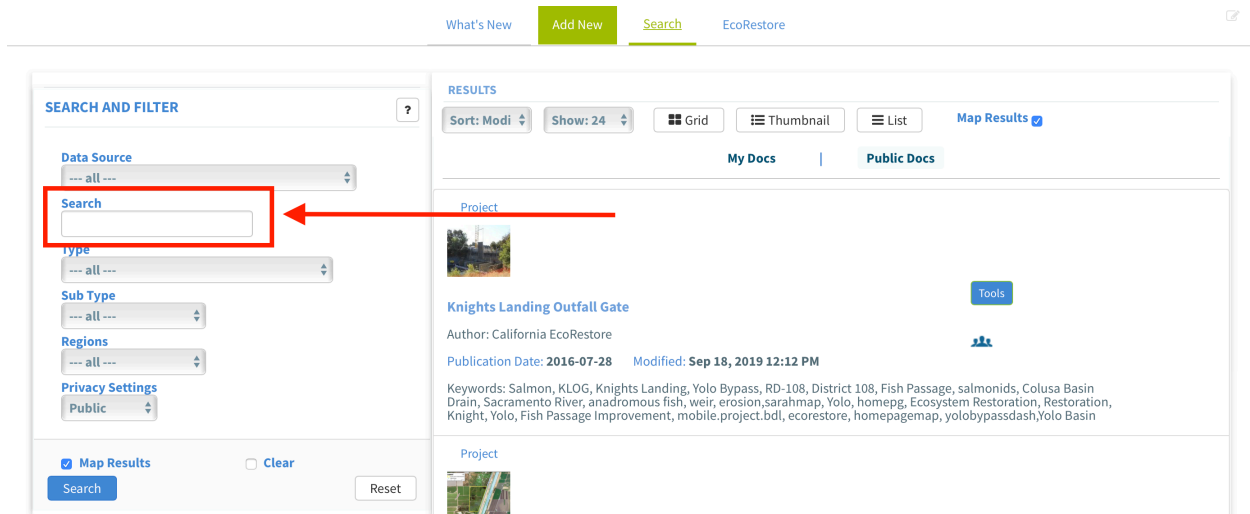
For example, this is what the built-in search function looks like in the project library.

Let's go through three different ways people might search using the built-in search function.

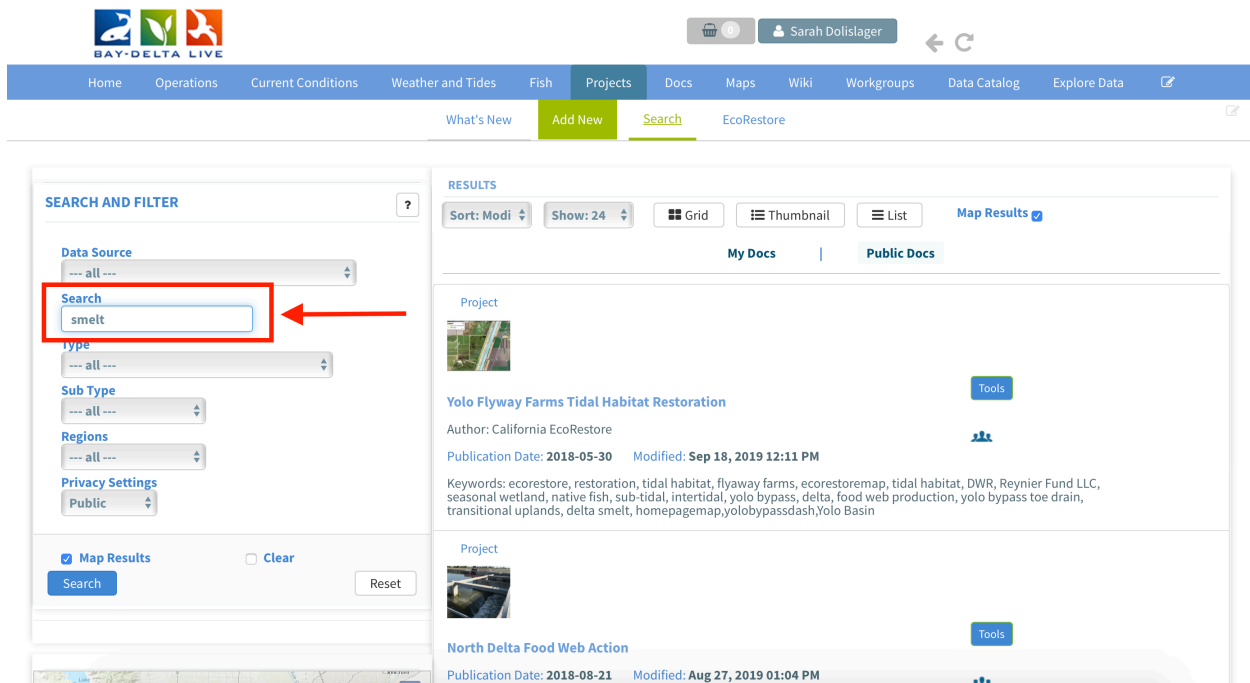
1. Typing keywords in the search box
2. Using the Type or Subtype drop-down menus in the built-in search function
3. Using the map feature in each library

TYPING KEYWORDS IN THE SEARCH BOX

The “search” box correlates with the titles and keywords in the metadata of the files or projects. Therefore, the results will show projects that have those keywords in the title or as a designated keyword.



For instance, type SMELT into the search box and the results will show files containing the word “smelt” in the title or metadata.



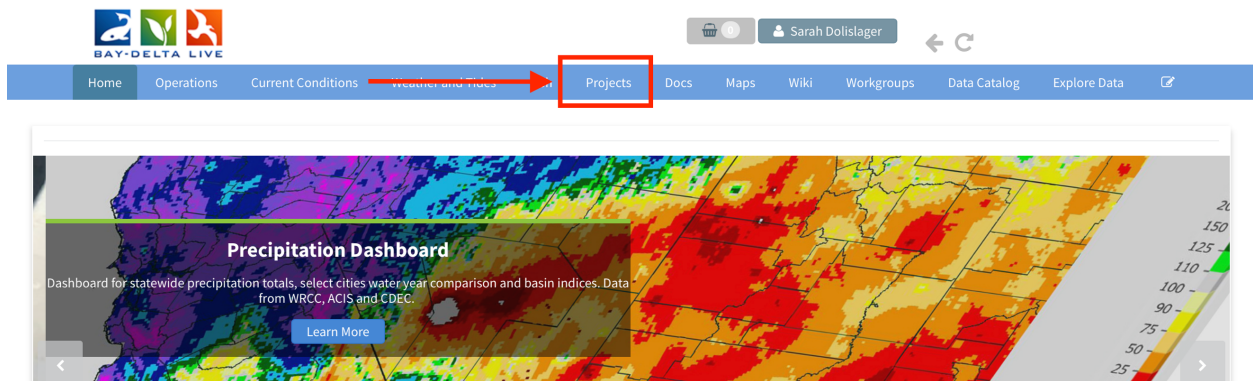
EDITING METADATA TO CORRELATE WITH KEYWORD SEARCH

Let's edit the metadata of a project to correlate with a keyword search.

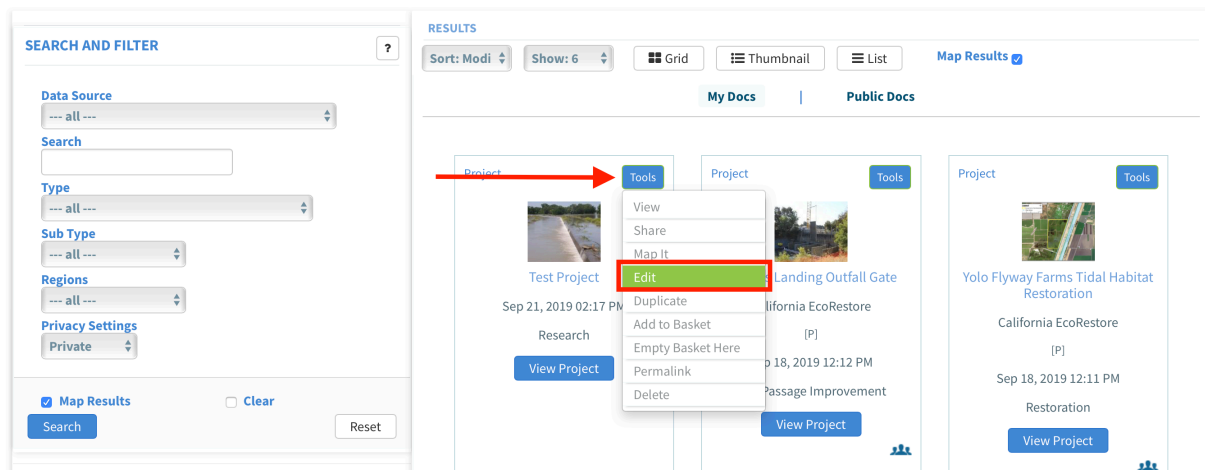
You can fill out the title and keywords in the metadata editor form of a file or project.

We'll do this for a project page as an example.

Go to the Project library from the homepage by clicking on the "Projects" link in the top bar.



Find the project you'd like to edit and hover over the Tools button until a drop-down menu appears.
Choose, "edit."



The metadata editor form pops up.

The screenshot shows a web interface with a 'SEARCH AND FILTER' panel on the left, a 'RESULTS' panel in the center, and a 'Map Results' panel on the right. The 'RESULTS' panel is titled 'EDITING TEST PROJECT' and contains a form with the following fields: 'Title' (containing 'Test Project'), 'Caption/Short Description', 'Description' (with placeholder text 'Description about the project.'), 'Web Link (Opens a new window)', 'Meta Data URL', 'DOI', and 'Contact Email Address'. A red box highlights the entire form area. A red arrow points from the 'Data Source' dropdown in the 'SEARCH AND FILTER' panel to the 'Save Changes' button at the top of the form.

There are two main places that correlate with the search box in the metadata editor form. The first is the TITLE box on the Main tab

This screenshot is similar to the one above, but with a different focus. A red box highlights the 'Title' field, which contains the text 'Test Project'. A red arrow points from the 'Search' input box in the 'SEARCH AND FILTER' panel to the 'Title' field.

The second is the KEYWORD box under the Organize tab.

SEARCH AND FILTER

Data Source
--- all ---

Search

Type
--- all ---

Sub Type
--- all ---

Regions
--- all ---

Privacy Settings
Private

☒ Map Results ☐ Clear

Search Reset

RESULTS

EDITING TEST PROJECT

Save Changes Cancel

Main Layout Map It! Publish? **Organize** Video/Embed Project Info

TYPE OR New Type**

Research

SUBTYPE OR New Subtype**

--- all ---

KEYWORDS

smelt

**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".

ICON

*An alternate icon - overrides content thumbnails etc..

Save Changes Cancel

Be sure these are filled out so that people can find your items when searching for specific keywords. Be as specific as possible. The keyword box is a good place to put all the words someone might associate with the project so that it shows up when users search the project library.

When you are done, click "save changes."

SEARCH

Search

Type
--- all ---

Sub Type
--- all ---

Regions
--- all ---

Privacy Settings
Private

☒ Map Results ☐ Clear

Search Reset

Main Layout Map It! Publish? **Organize** Video/Embed Project Info

TYPE OR New Type**

Research

SUBTYPE OR New Subtype**

--- all ---

KEYWORDS

smelt

**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".

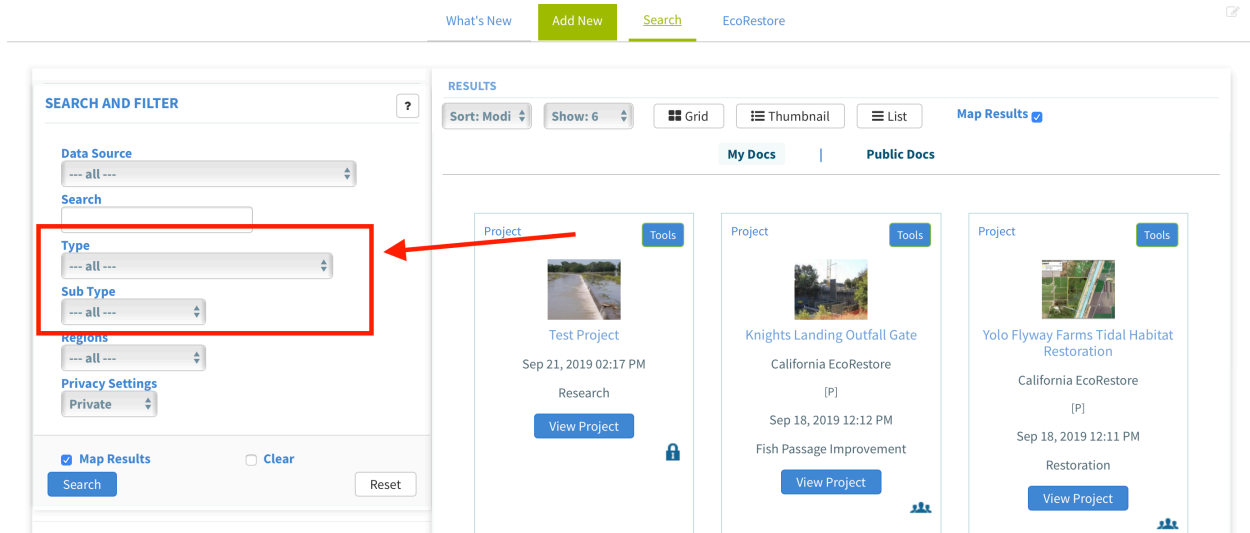
ICON

*An alternate icon - overrides content thumbnails etc..

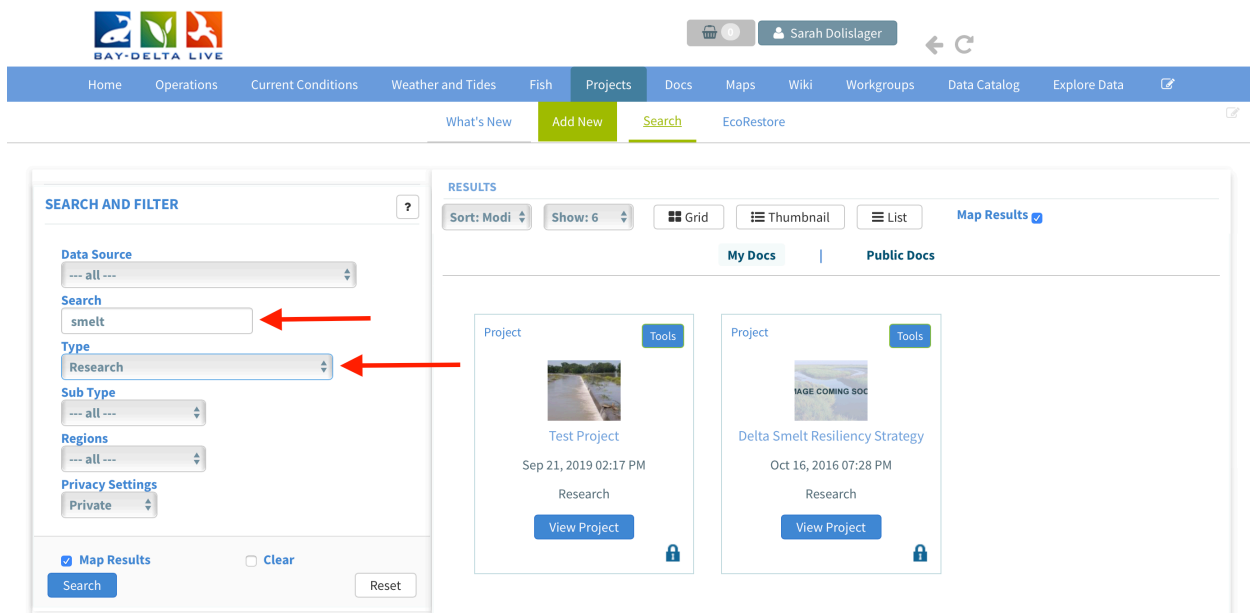
Save Changes Cancel

USING THE TYPE OR SUBTYPE DROP-DOWN MENUS IN THE BUILT-IN SEARCH FUNCTION

The Type and Subtype drop-down menus of the search function correlate with the type and subtype in the file or project metadata.



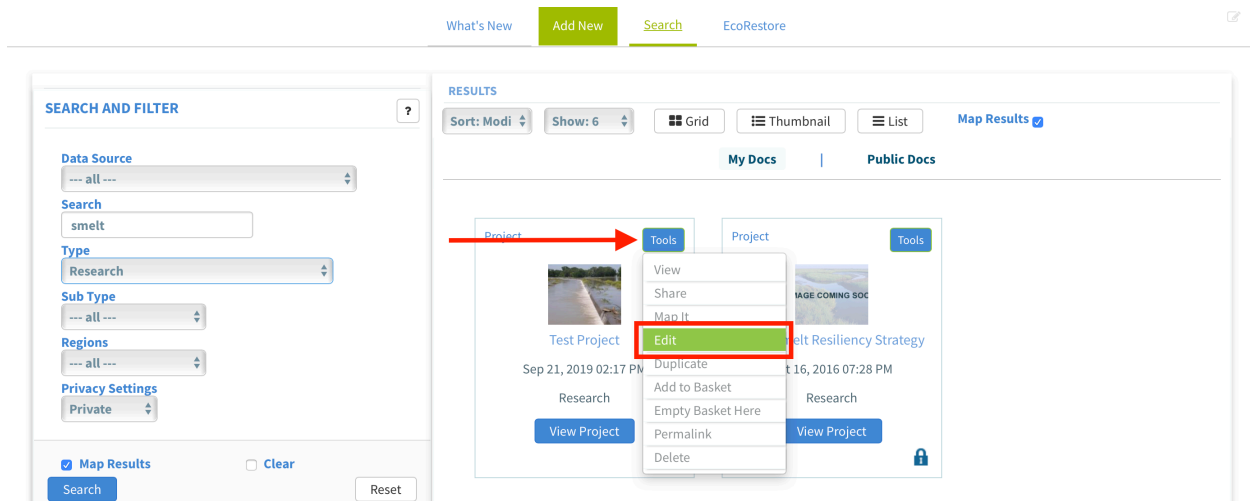
For instance, if someone wanted to make the smelt search more specific, they could type “smelt” in the search box and then choose, “research” from the Type drop-down menu and the results will adjust to include items that were specified as “research” projects.



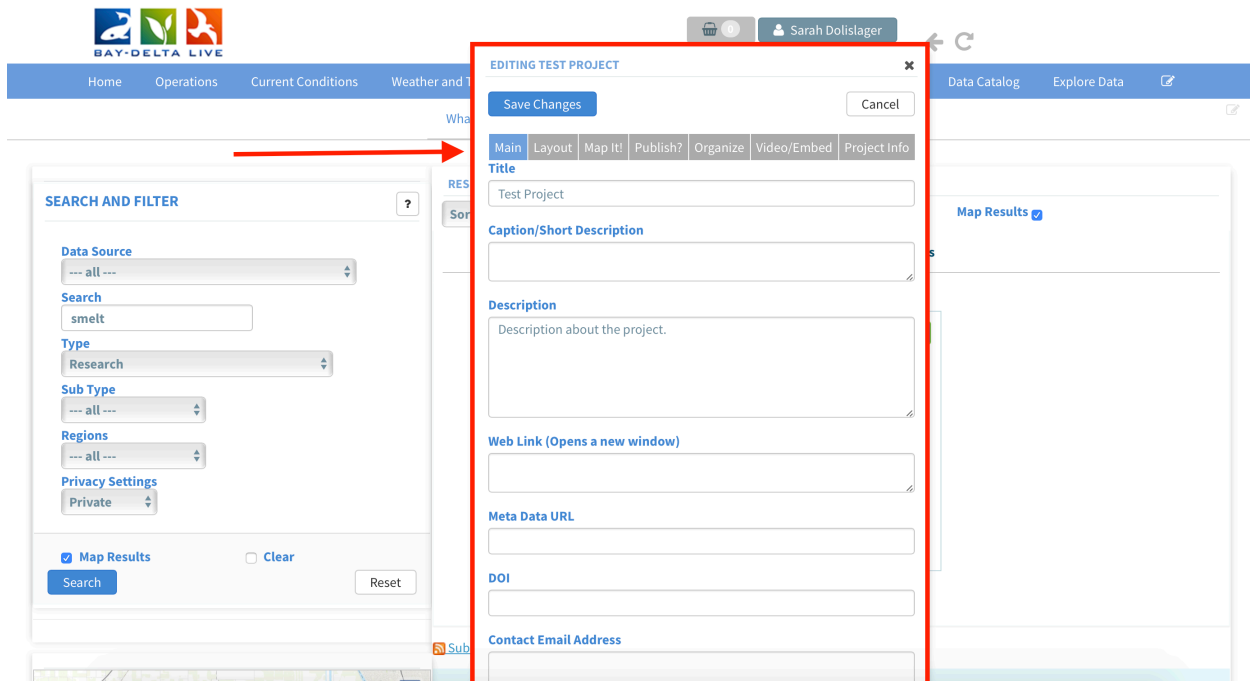
EDITING METADATA TO CORRELATE WITH THE TYPE AND SUBTYPE DROP-DOWN MENUS

Let's select a Type for a project as an example.

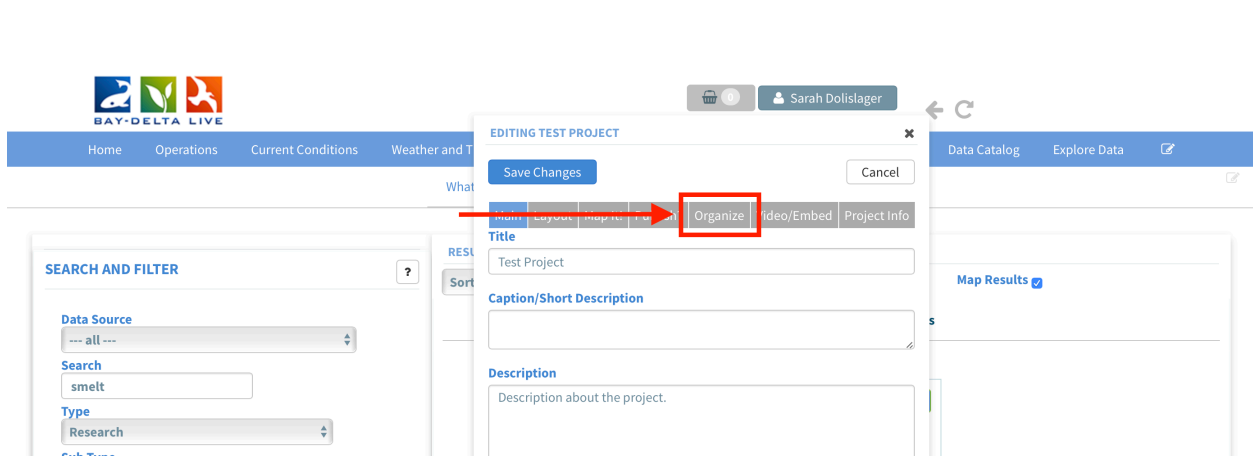
Find the project you'd like to edit and hover over the Tools button until a drop-down menu appears.
Choose, "edit."



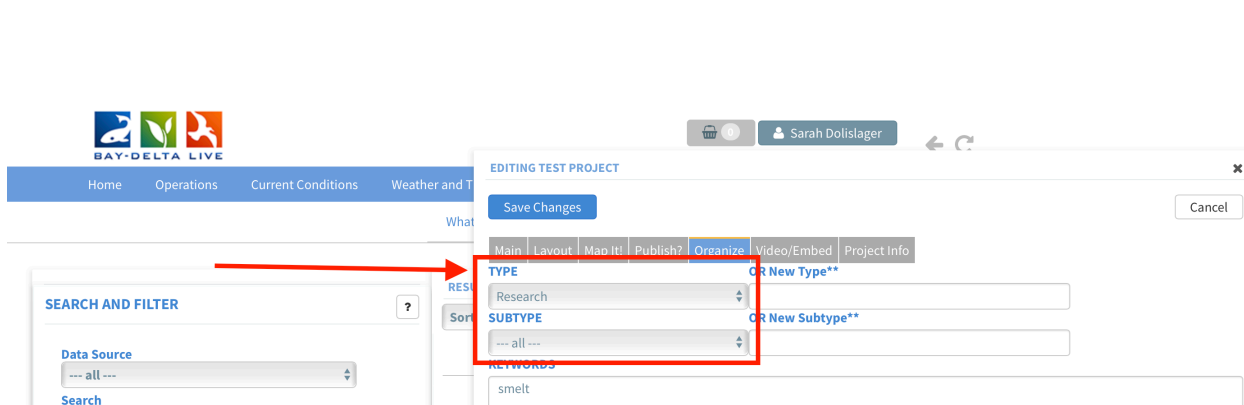
The metadata editor form pops up.



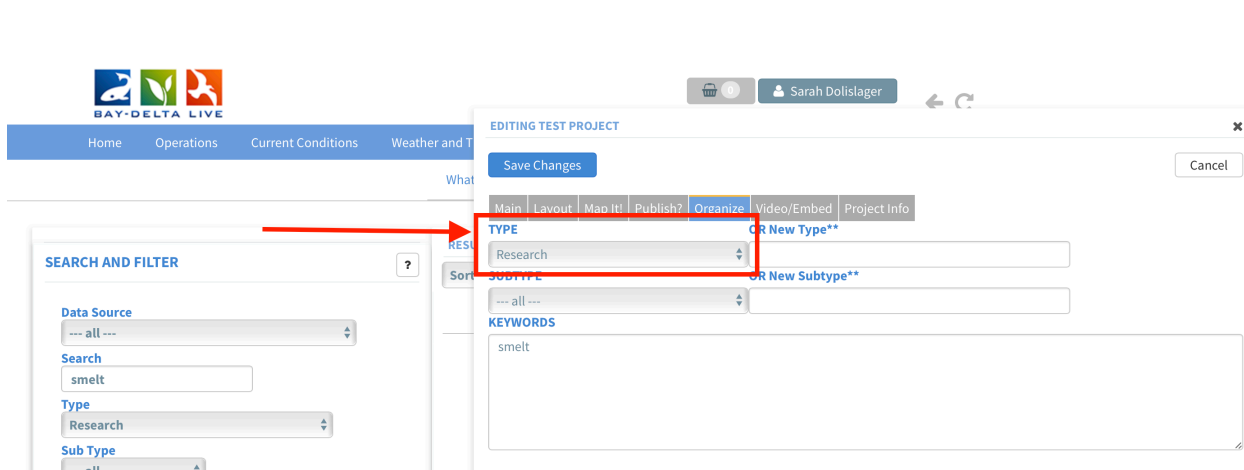
Click on the “Organize” tab.



You will see the Type and Subtype drop-down menus.



Select, “research” under the Type drop-down menu.



This means that if “research” is selected as a Type in the search function, this project will show up among the results.

Click “Save changes” to complete the changes.

The screenshot shows the 'Organize' tab of the Bay-Delta Live interface. On the left is a 'SEARCH AND FILTER' sidebar with dropdowns for Data Source (all), Search (smelt), Type (Research), Sub Type (all), Regions (all), and Privacy Settings (Private). Below these are checkboxes for 'Map Results' and 'Clear', and a 'Search' button. The main area has tabs for Main, Layout, Map It!, Publish?, Organize (selected), Video/Embed, and Project Info. It contains fields for TYPE (Research), SUBTYPE (all), KEYWORDS (smelt), and an ICON field. A red box highlights the 'Save Changes' button at the bottom, with a red arrow pointing to it. A 'Cancel' button is also visible.

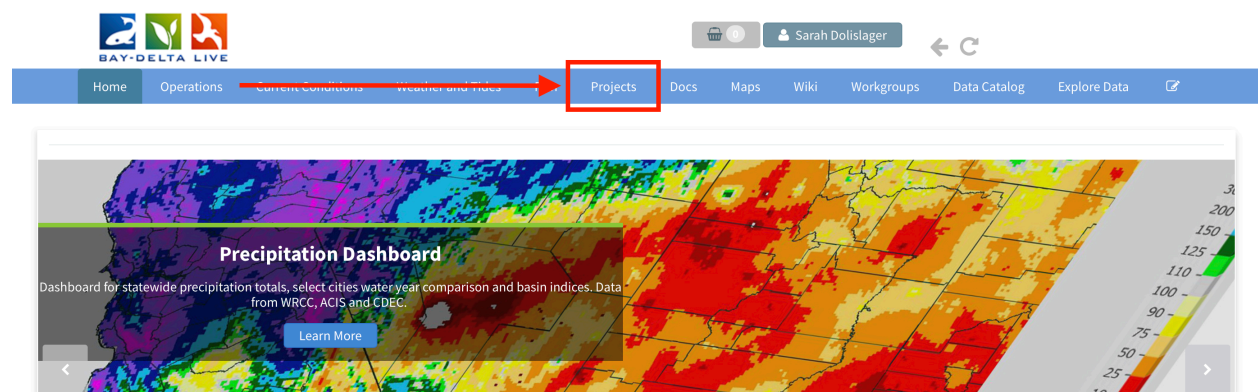
USING THE MAP FEATURE IN EACH LIBRARY

Every asset on Bay-Delta Live can be geolocated by entering the latitude and longitude coordinates in the metadata.

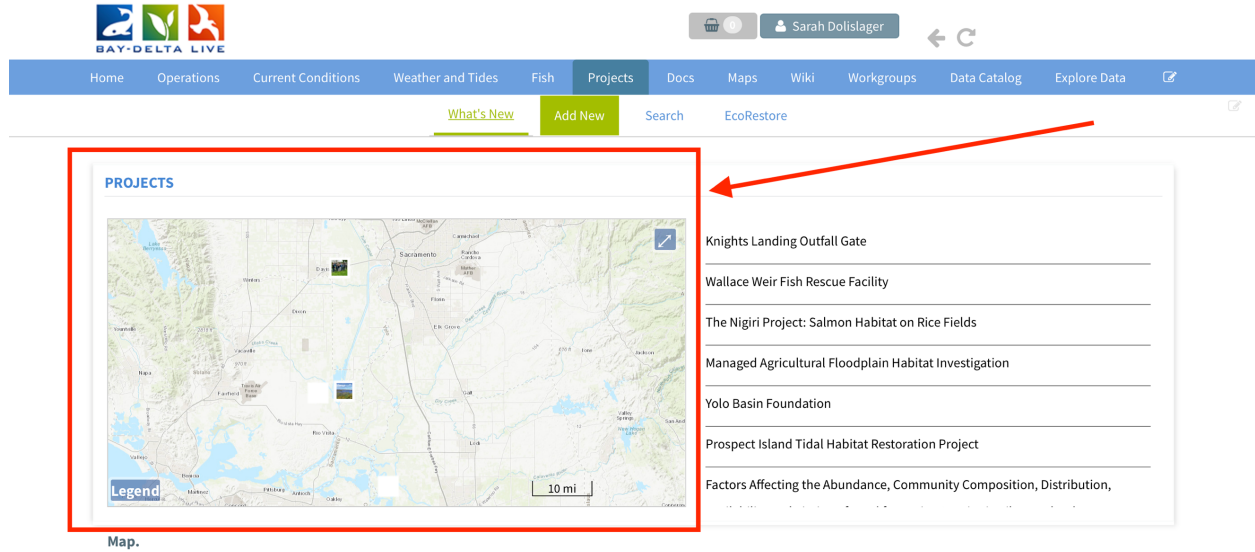
All assets that are geolocated will show up on the maps in the asset libraries on Bay-Delta Live.

Let's find the project library map as an example.

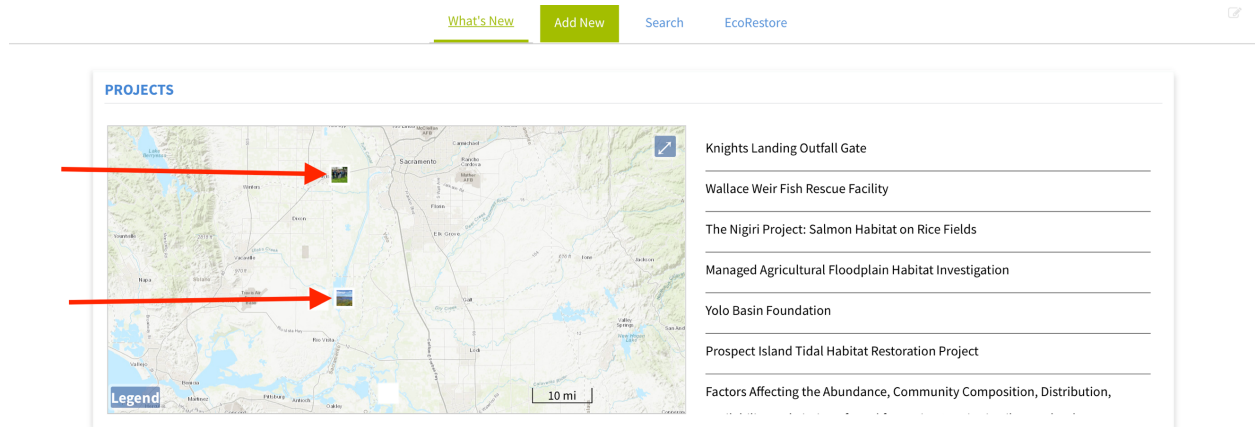
From the homepage, click on the “Projects” link in the top bar to open up the project library.



It opens up to the “What’s New” tab, which shows a map on the left-hand side.



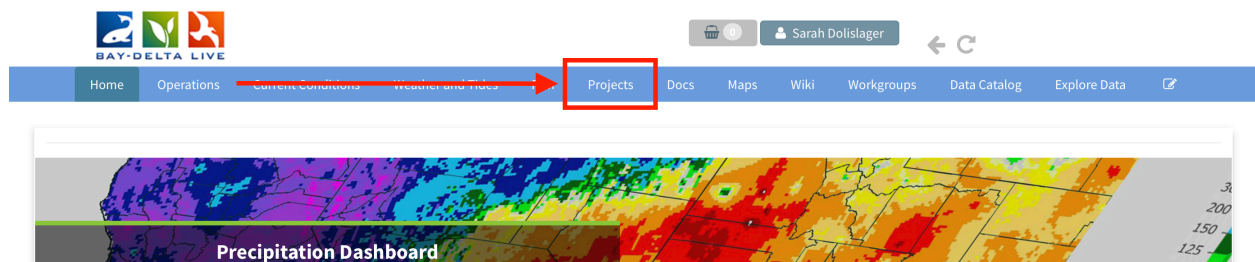
You can see that there are icons on the map. These are populated using the latitude and longitude coordinates in the metadata of each project page.



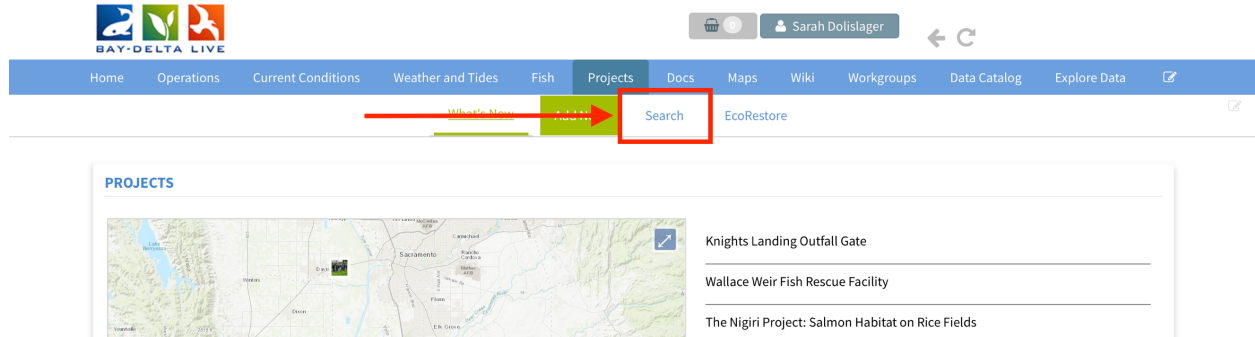
EDITING METADATA TO GEOREFERENCE A PROJECT PAGE

Let’s edit the metadata for a project page as an example.

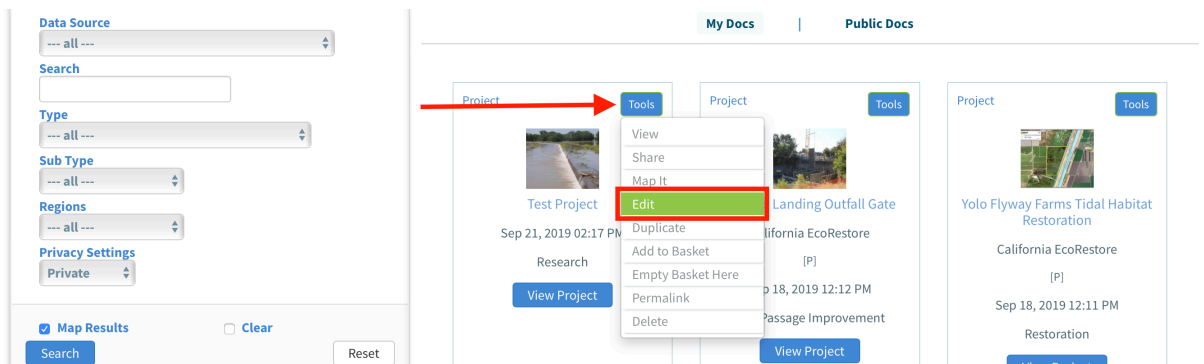
Go to the project library from the homepage by clicking on the “Projects” link in the top bar.



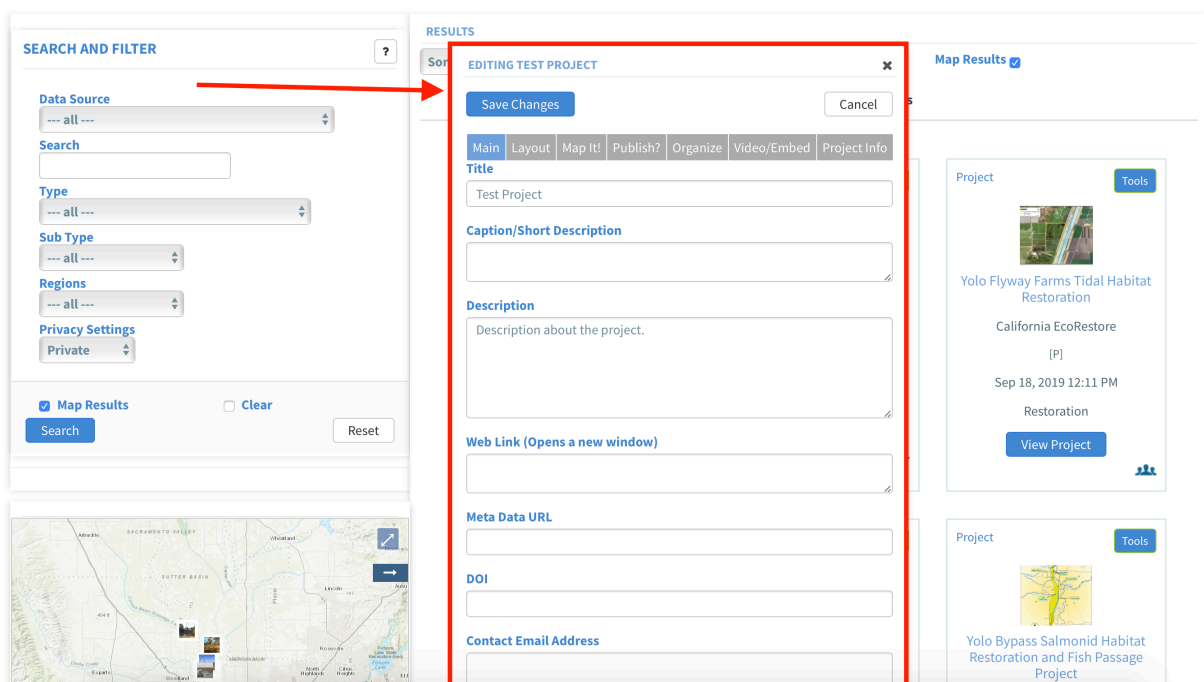
Then click on “Search” in the sub-navigation to view the entire project library.



Find the project you'd like to edit and hover over the Tools button until a drop-down menu appears. Choose, “edit.”



The metadata editor form pops up.



You can enter the latitude and longitude coordinates or click “Open Map” to select a specific point on the map.

The screenshot shows the 'EDITING TEST PROJECT' form. On the left is a 'SEARCH AND FILTER' sidebar with dropdowns for 'Data Source', 'Type', 'Sub Type', 'Regions', and 'Privacy Settings'. The main form has tabs: 'Main', 'Layout', 'Map It!', 'Publish?', 'Organize', 'Video/Embed', and 'Project Info'. The 'Map It!' tab is active, showing an 'Open Map' button and a text prompt 'Click on the map to assign coordinates.' Below this are input fields for 'Latitude' (containing 38.305911401059944) and 'Longitude' (containing -121.68049067258833). Red arrows point from the 'Open Map' button and the two coordinate input fields to the right. To the right of the form is a 'Map Results' panel showing a map thumbnail and project details: 'Yolo Flyway Farms Tidal Habitat Restoration' and 'California EcoRestore'.

Once you select a location on the map, the latitude and longitude coordinates will show in the form.

This screenshot shows the 'EDITING TEST PROJECT' form overlaid on a map of the Sacramento Valley. The 'Map It!' tab is selected, and the 'Open Map' button is visible. The 'Latitude' and 'Longitude' fields contain the same coordinates as in the previous screenshot. The map in the background shows a green landscape with a river and some buildings.

Click “Save Changes.”

This screenshot shows the 'EDITING TEST PROJECT' form with the 'Save Changes' button highlighted by a red rectangle and a red arrow pointing to it. The 'Map It!' tab is still selected, and the 'Open Map' button is visible. The 'Latitude' and 'Longitude' fields contain the same coordinates. The map in the background is the same as in the previous screenshot.

As long as your project is public, it will show up on the map so people can search by location.

We've gone through three ways people might search for files or projects in the Bay-Delta Live database and how you can set up your documents or projects so that they are searchable and complete. You can follow these steps to edit the information of your files, maps, or projects at any time.