How to quickly upload metadata and files in bulk

This How to guide describes the steps to bulk upload metadata alongside your folders and files in Starter. This function is available to all Starter users.

This guide will explain the following steps:

- **How to download a metadata template (Dublin Core and MODS)**
- **The requirements for adding metadata to the metadata template**
- **How to upload the completed metadata template file alongside a folder containing files**

In order to complete the bulk upload of files and metadata successfully you will need to have prepared the following:

- **A folder with files to be uploaded**
- **The metadata you want to associate with your files using either Dublin Core or MODS fields, preferably already in a Microsoft Excel© spreadsheet**

The example below uses the Dublin Core metadata template in a comma delimited format, but the same principles apply if you are using the MODS metadata template and/or in a Tab-delimited format.

1   How to download a metadata template in Starter

1.1   Login to Starter using your email address and password.

The *Home* **screen will display.**

1.2   Click the <u>Add</u> **menu and select** <u>Download Dublin Core template.</u>

The Dublin_Core-template.csv **will then be downloaded. Go to your** *Downloads* **folder to open it.**

1.3   Open the Dublin_Core-template.csv **file in Microsoft© Excel and then save it using** <u>Save As</u> **with a different name of your choosing in the same**

location as the folder you will be ingesting, ensuring it is still in csv format.

Name

master-gmd-gmd376m-g3764m-g3764bm-g03693001-sb00001a.tif

Metadata for Map of Boston.csv

A1	▼ : × ✓ ƒx	filename

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	filename	Contributor	Coverage	Creator	Date	Description	Format	Identifier	Language	Publisher	Relation	Rights	Source	Subject	Title	Type
2																
3																
4																

2 Adding metadata to the metadata template

2.1 **Open the newly saved metadata csv file in Microsoft© Excel, and the file that contains the metadata you want to add into the csv metadata file.**

2.2 **In the opened metadata csv file you can see that Row 1 contains the field headings related to the specific metadata template downloaded, <u>this must not be changed</u> in any way otherwise the metadata upload will not work.**

 You only need to populate the fields that you wish to add metadata to, and only the fields that have metadata in will be displayed in Starter. Blank or empty fields will not display.

2.3 **The other requirement is that the *filename* column must contain the exact name, including the extension, of the file it corresponds with. For example:**

master-gmd-gmd376m-g3764m-g3764bm-g03693001-sb00001a.tif

	A
1	filename
2	master-gmd-gmd376m-g3764m-g3764bm-g03693001-sb00001a.tif

If you are also uploading folders you can add them into the filename column, you will also need to add the name of the parent folder. If you forget to do this then you will receive the warning message below followed by a list of folders.

Error with submission

There are files without associated filenames, no metadata will be mapped to those rows:

If you click I understand, continue the ingest **then the upload will continue as normal. This is just a warning that the folders do not have any metadata listed for them, the ability to add metadata to folders is a feature we will be adding in the future.**

2.4 Copy (or type) the metadata from the metadata file you opened previously against the relevant filename in the appropriate column within the metadata template.

The CSV metadata file can handle the following:
- **Special Characters (UTF-8)**
- **Capitalisation**
- **Spaces**
- **Emojis**

There is no limit on metadata length or the number of rows, the only limit is the overall package size which as normal is 4Gb. You can have only one metadata csv file per ingest.

**2.5 You should end up with something that looks like this.**

	A	B	C	D
1	filename	Contributor	Coverage	Creator
2	master-gmd-gmd376m-g3764m-g3764bm-g03693001-sb00001a.tif		Boston (Mass.)--Maps.<	Sanborn, D. A. (Daniel Alfred), -1883., cartographer

2.6 Once done check everything is correct and save the file.

3 How to upload the completed metadata csv template file alongside a folder containing files

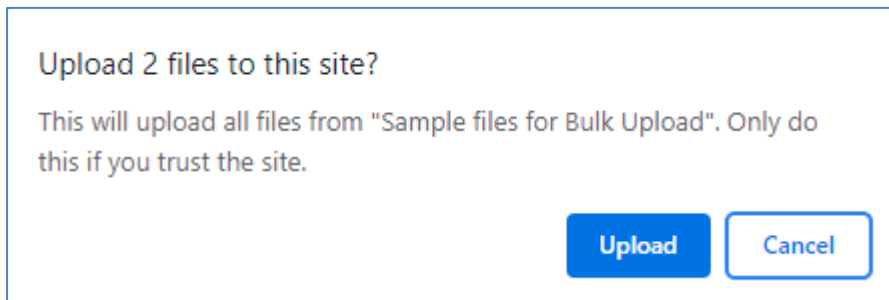**3.1 Now our metadata is prepared we can upload the folder, files and metadata.**

In Starter click <u>Add>Upload a folder with metadata using one of the templates</u>
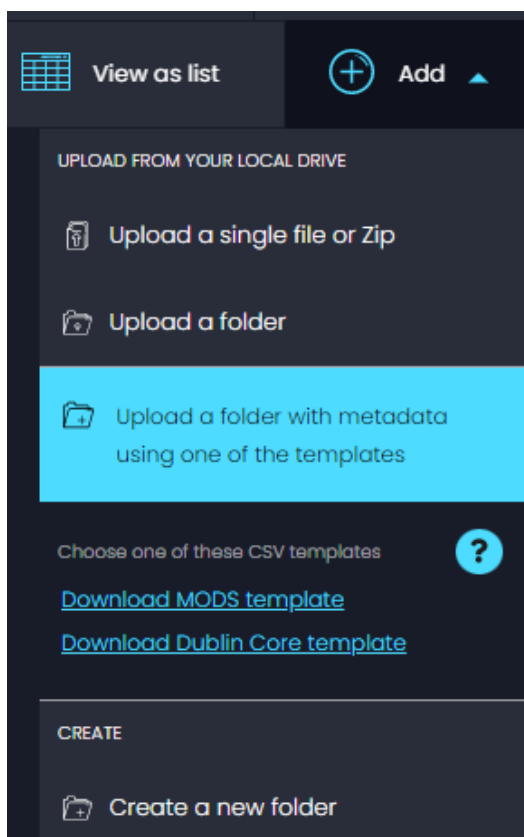
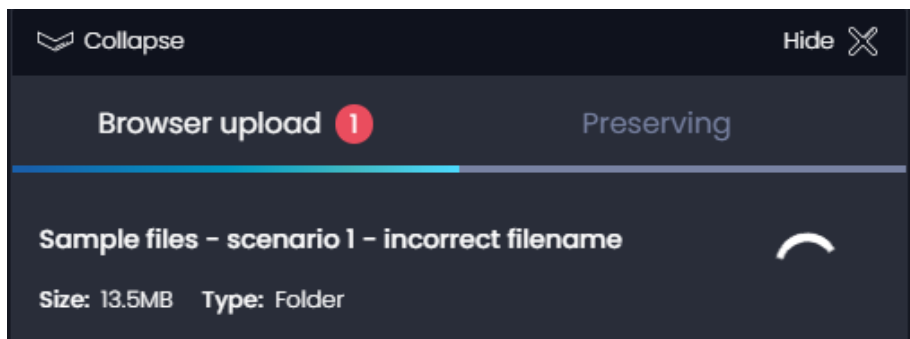**3.2** **Navigate to and select the folder containing the files and csv metadata file to be uploaded, and click Upload.**

You can only perform one upload at a time.

3.3 **A message will display confirming what you have selected and if you wish to proceed.**

Upload 2 files to this site?

This will upload all files from "Sample files for Bulk Upload". Only do this if you trust the site.

Upload   Cancel

Click Upload

3.4 **The upload will begin, a notification bar will appear where you can see the progress.**

Collapse   Hide ✖

Browser upload ①   Preserving

Sample files - scenario 1 - incorrect filename

Size: 13.5MB   Type: Folder

3.5 **Once this has completed the next action required is to select the metadata file in the sidebar. Only csv files that are present in the folder selected for upload will display.**

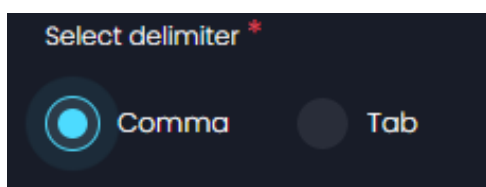**Under** *Select the metadata file* **choose the renamed .csv file that contains the metadata.**
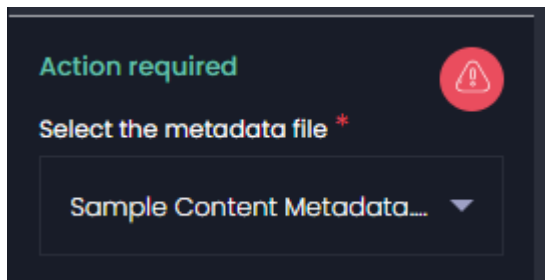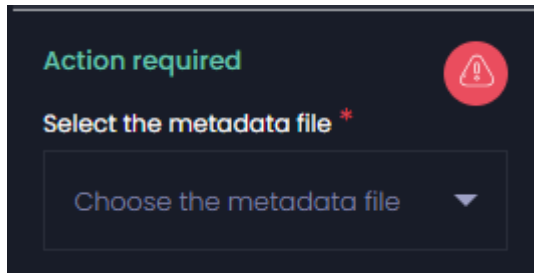
3.6 **We then need to choose the metadata schema.**

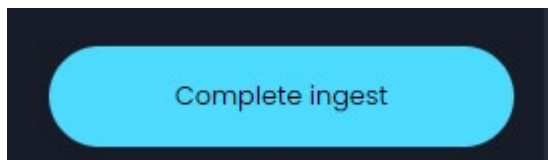**As this example is using the Dublin Core template, select <u>Dublin Core</u>**
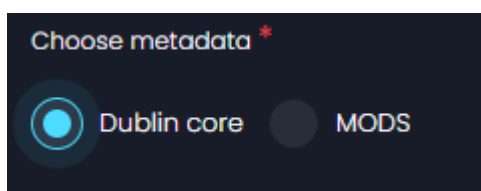
3.7 **And then we need to select the delimiter type**

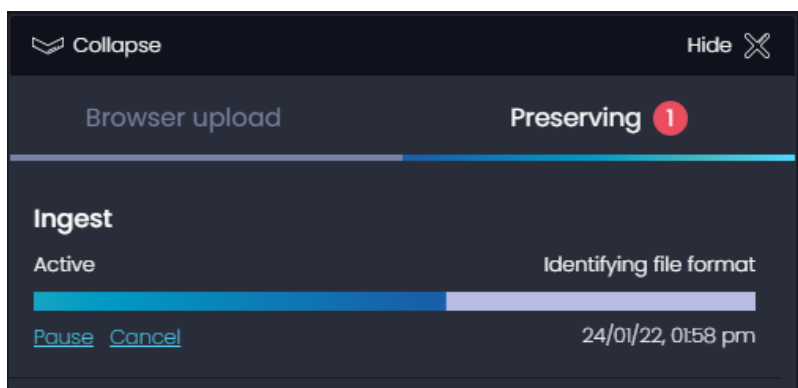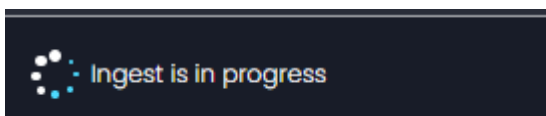**As this example is a comma delimited file, select <u>Comma</u>**

3.8 **Once done and ready to proceed select <u>Complete ingest</u>.**

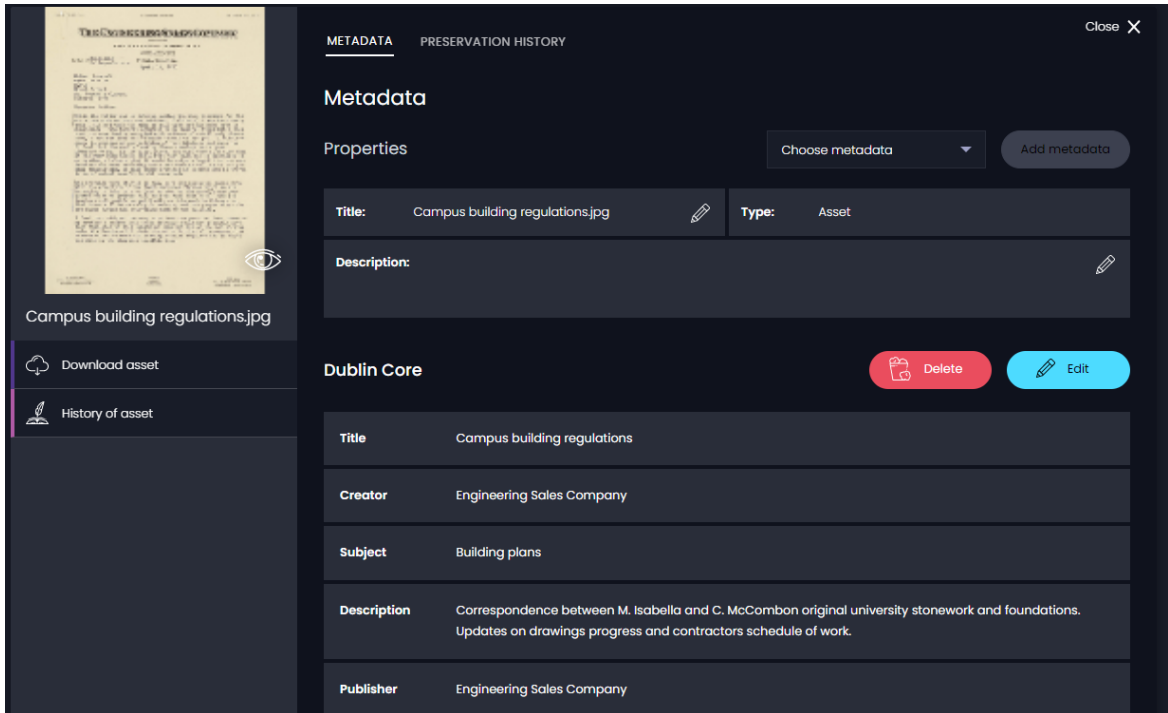**The <u>Complete Ingest</u> button will be active only if the above options have been selected.**

3.9 **The upload, ingest and preserving workflows will automatically start, and if completed successfully will display a success message in green.**
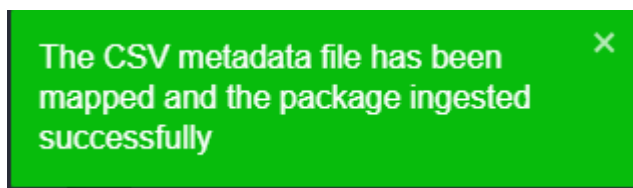
3.10 **Once completed you can close any notification tabs.**

3.11 **We can view the ingested package with metadata by clicking on the folder and looking at an asset.**

Click on the folder, drill-down to an asset to see the populated Dublin Core metadata.

Troubleshooting

1. **An** *Error with Submission* **screen with a** *There are files without associated filenames, no metadata will be mapped to those rows* **message may display, depending on the structure of the folder and files. This may be because a file exists without associated metadata or because we do not currently map metadata to a folder.**
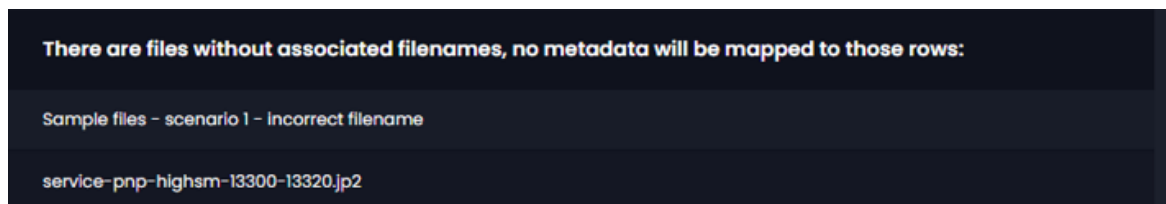
> There are files without associated filenames, no metadata will be mapped to those rows:
>
> Sample files - scenario 1 - incorrect filename
>
> service-pnp-highsm-13300-13320.jp2

Click I understand, continue the ingest to proceed or Cancel ingest to cancel the ingest.

> I understand, continue the ingest   Cancel ingest

2. **An** *Error with Submission* **screen with a** *Some rows include filenames that don't have an associated file. The ingest will ignore metadata in those rows:* **message may display. This means there is a discrepancy between the actual filename and the filename referenced in the metadata csv file.**

> Some rows include filenames that don't have an associated file. The ingest will ignore metadata in those rows:
>
> service-pnp-fsac-1a34000-1a34200-1a34209v.jpg
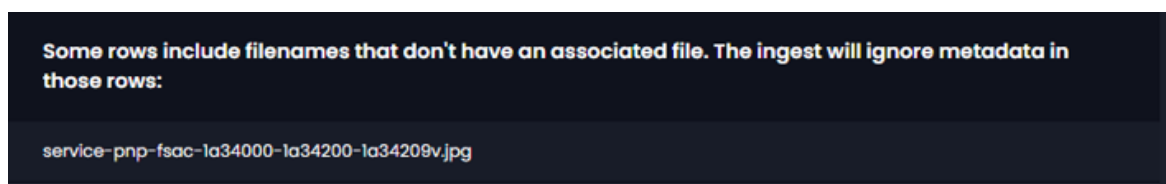
Click I understand, continue the ingest to proceed or Cancel ingest to cancel the ingest and resolve the problem before trying again.

> I understand, continue the ingest   Cancel ingest

3. **If no csv metadata file exists or it is in the wrong place, the ingest will immediately fail with the following messages**
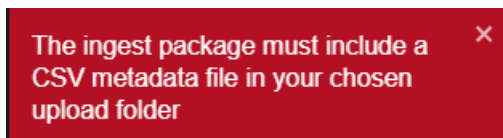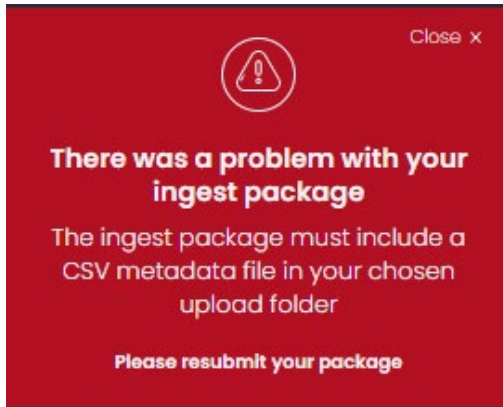
Modify the folder to include the csv metadata file in the correct place and resubmit the package.

4. **If the wrong metadata template is selected in the Choose metadata field, for example for a Dublin Core metadata template the MODS option is chosen, or the wrong delimiter option is selected, for example Tab instead of Comma, the following error messages will display:**