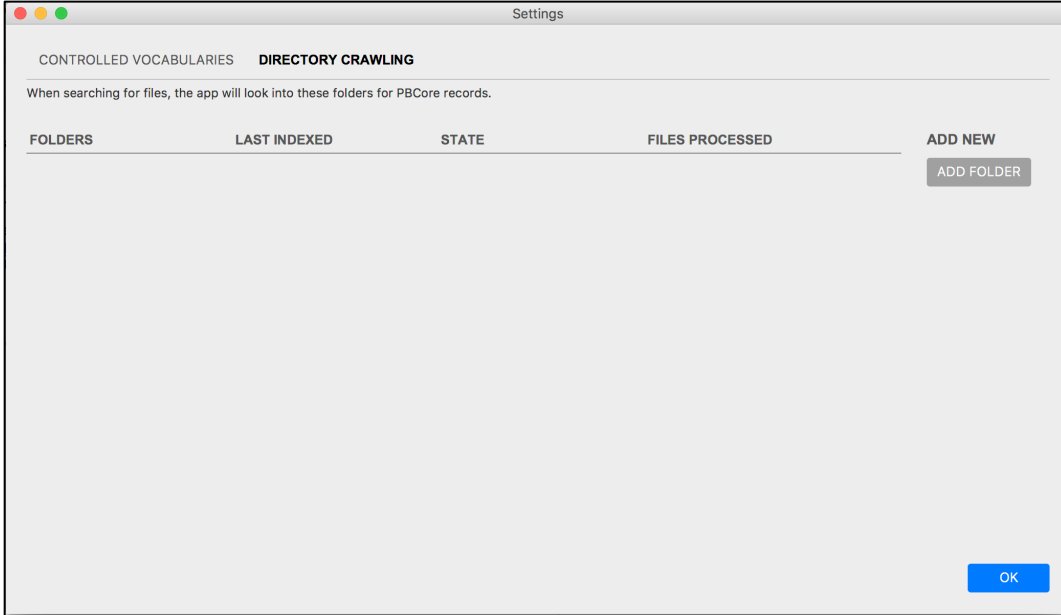
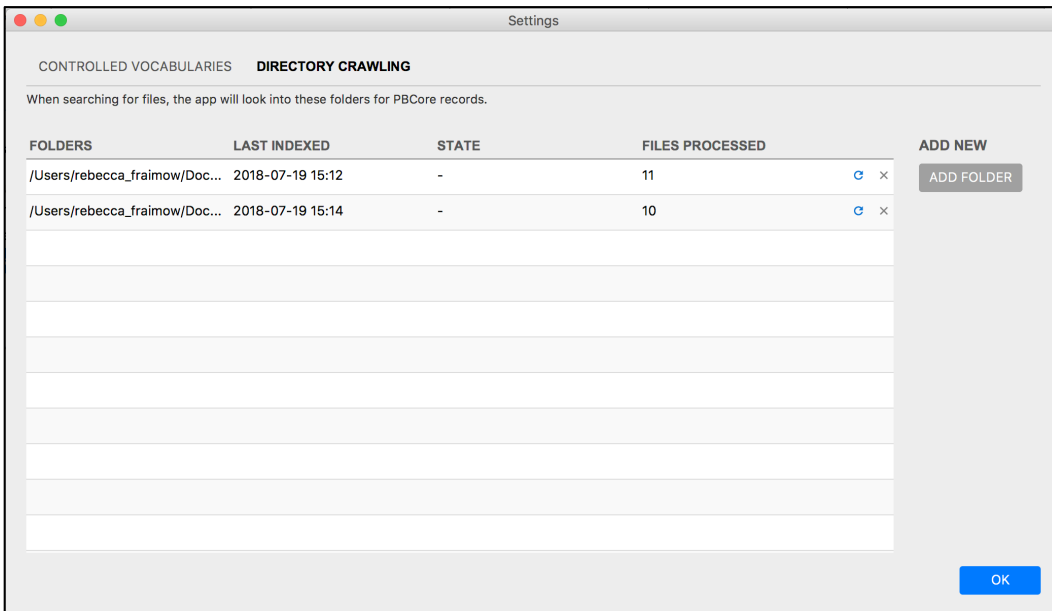


## Getting Started

1. On first opening the tool, you'll be prompted to identify a folder/folders for Directory Crawling.



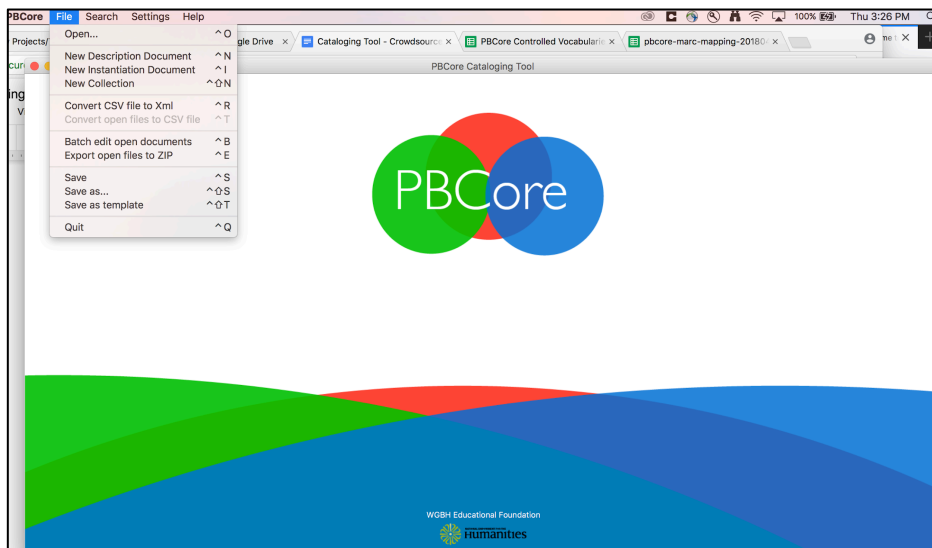
2. When you identify a folder for Directory Crawling, the tool will index all the PBCore XML records in that folder. Multiple folders can also be selected at any time for indexing. When the records have been indexed, the number of successfully processed records will appear under 'Files Processed' in the 'Directory Crawling' screen.



- Any indexed records will now be searchable in the tool. When you save records, the tool will save them in the latest folder indexed by the Directory Crawler unless you specify an alternate location. Clicking 'OK' will take you out of the Directory Crawler and return you to the tool's title screen.
- From the title screen, you can use the menu buttons to create new records, import additional records, search the records indexed by the Directory Crawler.

## Creating Records

- The File menu drop-down in the tool gives you the option to create either a new Description Document, a new Instantiation Document, or a new Collection. For more information about choosing between these types of documents, see the section on PBCore Documents Types at the end of this user documentation.



Once you have decided what kind of record you would like to create, select that option from the File drop-down menu. You are now in the document's Edit field.

- Along the left side, you will see a listing of elements. By default, that listing includes the Root Element that defines whether the document is a Description Document, an Instantiation Document, or a Collection as well as the required elements for that form of document. Required elements have a yellow warning sign next to them until they are filled in. These elements must be included for a PBCore XML document to be valid. For example, an 'Identifier' element is required in all PBCore documents.

**ELEMENTS**

ROOT ELEMENT  
Description Document + ELEMENT VALUE ⚠

REQUIRED ELEMENTS

- ⚠ Identifier [copy]
- ⚠ Title [copy]
- ⚠ Description [copy]

OPTIONAL ELEMENTS

ELEMENT ATTRIBUTES + ADD ATTRIBUTE

Source  
enter here... ⚠

- When you click on the element, you will see in the middle of the screen a field called 'Element Value' where you can enter text. For example, clicking on the Title element allows you to enter a title for the record, such as "Downton Abbey."

**ELEMENTS**

ROOT ELEMENT  
Description Document + ELEMENT VALUE

Downton Abbey

REQUIRED ELEMENTS

- ⚠ Identifier [copy]
- Title [copy]
- ⚠ Description [copy]

OPTIONAL ELEMENTS

- Below that, you will see a section called 'Element Attributes.' Attributes are used to provide more detail about the data in an Element. Some elements have required attributes in PBCore to provide necessary information about them. For example, the Identifier element has a required attribute, 'source,' which tells you where the identifier comes from. Even if text is added to this element, it will continue to display a yellow warning sign until the required attribute is filled in.

**ELEMENTS**

ROOT ELEMENT  
Description Document +

ELEMENT VALUE  
00001

REQUIRED ELEMENTS

- Identifier (Warning icon)
- Title
- Description (Warning icon)

OPTIONAL ELEMENTS

ELEMENT ATTRIBUTES + ADD ATTRIBUTE

Source

PREVIEW

DESCRIPTION DOCUMENT:

IDENTIFIER: 00001

Source:

TITLE: Downton Abbey

DESCRIPTION:

**ELEMENTS**

ROOT ELEMENT  
Description Document +

ELEMENT VALUE  
00001

REQUIRED ELEMENTS

- Identifier
- Title
- Description (Warning icon)

OPTIONAL ELEMENTS

ELEMENT ATTRIBUTES + ADD ATTRIBUTE

Source  
WGBH

PREVIEW

DESCRIPTION DOCUMENT:

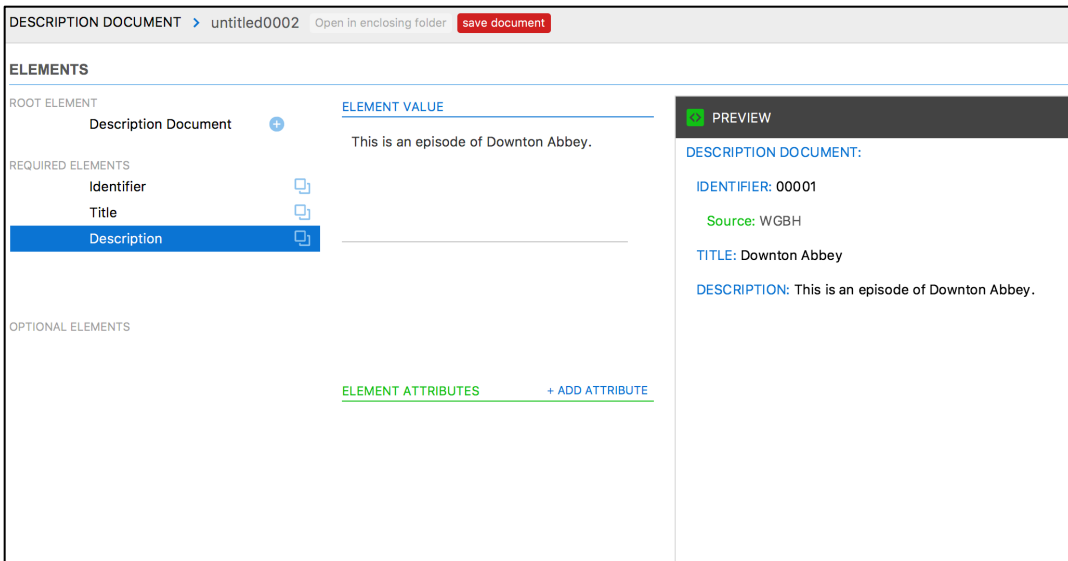
IDENTIFIER: 00001

Source: WGBH

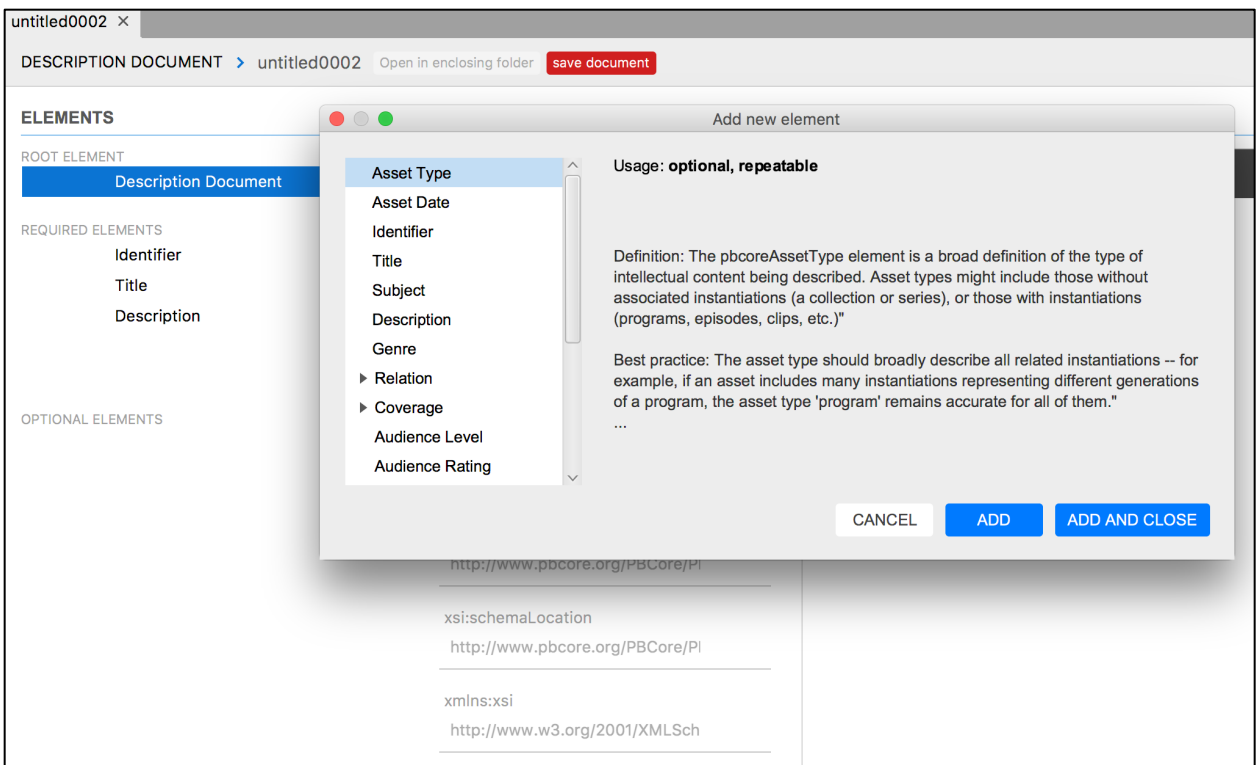
TITLE: Downton Abbey

DESCRIPTION:

5. Once you fill in all required elements, you have created a valid PBCore document!

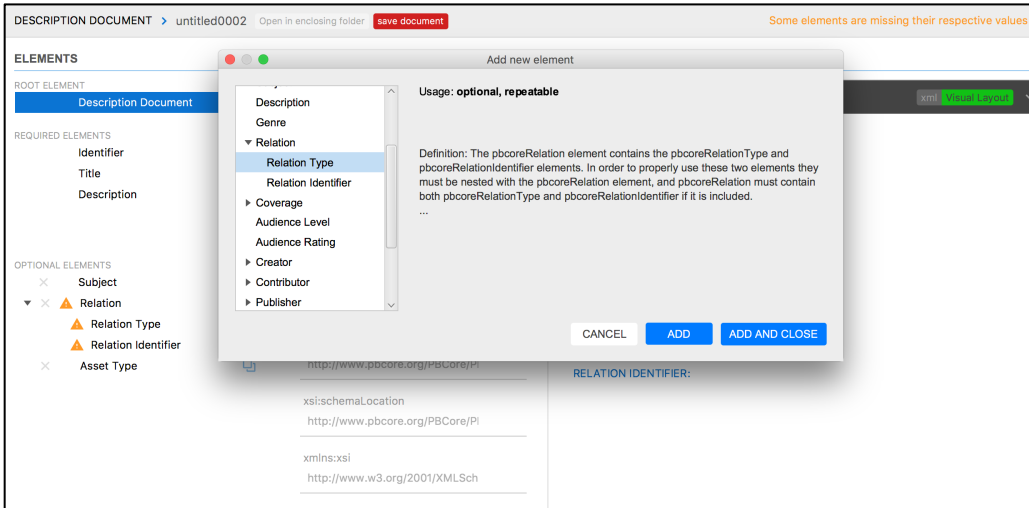


- Once you have filled in all required elements, you can add any additional element fields using the small + button next to 'Description Document.' This will bring up the 'Add New Element' window.

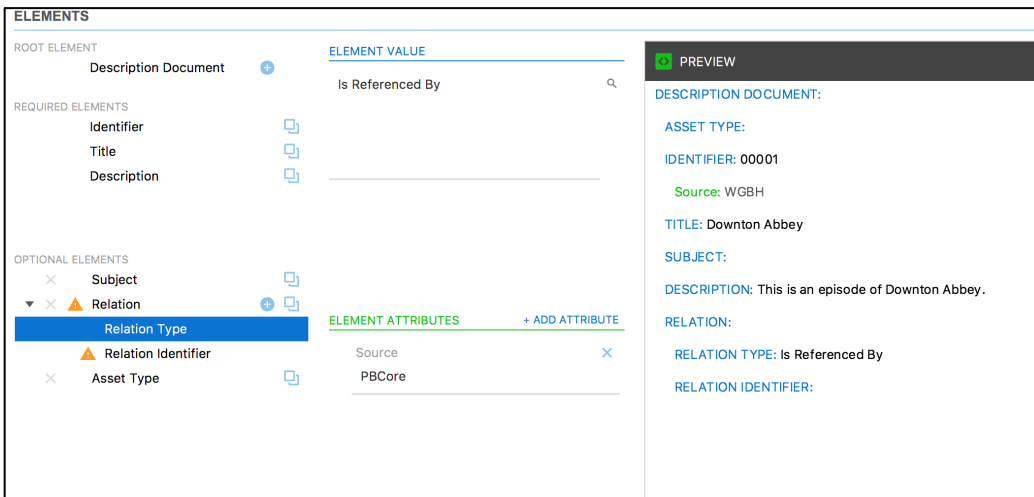


- Any number of elements can be selected and added from this menu. Some elements structurally contain other elements, known as sub-elements. Elements that contain other elements are known as parent elements. Usually, data cannot be added to these parent elements; they only serve the structural purpose of linking sub-elements together.

Elements that contain sub-elements have a small arrow next to them, which can be clicked to reveal the sub-elements. If a sub-element is added to the record from this menu, all parent element fields and additional required element fields will automatically be added to the record as well. For example, if you select 'Relation Type,' the parent element 'Relation' and required element 'Relation Identifier' will be added by default.



8. If you don't want to add any more elements, you can click the 'Add And Close' button to close the 'Add new element' menu.
9. Values can now be added to the new element fields from the main document editing field. If any of the new elements have required sub-elements, the yellow warning sign will appear until the required fields are filled in.

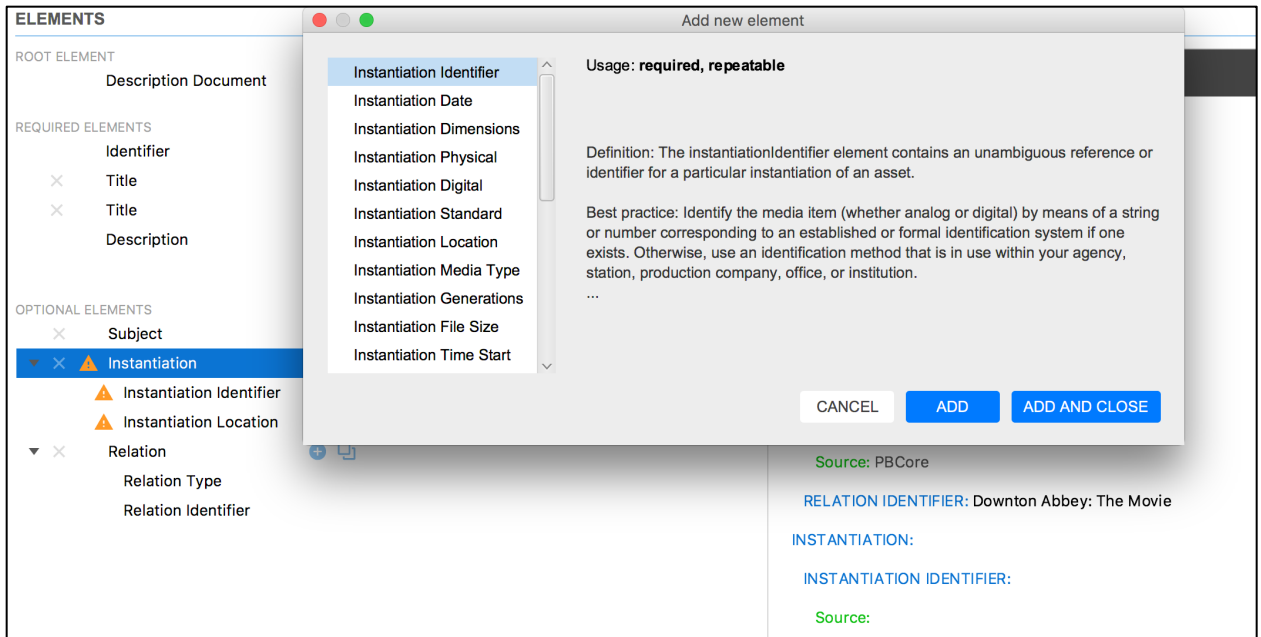


The screenshot shows the 'ELEMENTS' interface. On the left, there is a tree view of elements. The 'ROOT ELEMENT' is 'Description Document'. Below it are 'REQUIRED ELEMENTS': 'Identifier', 'Title', and 'Description'. Under 'OPTIONAL ELEMENTS', there is a collapsed 'Subject' and an expanded 'Relation' section containing 'Relation Type', 'Relation Identifier' (highlighted in blue), and 'Asset Type'. A small blue '+' icon is next to 'Description Document'. A blue duplication icon is next to 'Identifier', 'Title', and 'Description'. A green '+' icon is next to 'Relation Identifier'. Below the optional elements is a section for 'ELEMENT ATTRIBUTES' with a '+ ADD ATTRIBUTE' link. The 'ELEMENT VALUE' field contains 'Downton Abbey: The Movie'. On the right, a 'PREVIEW' pane shows the following details: 'DESCRIPTION DOCUMENT:', 'ASSET TYPE:', 'IDENTIFIER: 00001', 'Source: WGBH', 'TITLE: Downton Abbey', 'SUBJECT:', 'DESCRIPTION: This is an episode of Downton Abbey.', 'RELATION:', 'RELATION TYPE: Is Referenced By', 'Source: PBCore', and 'RELATION IDENTIFIER: Downton Abbey: The Movie'.

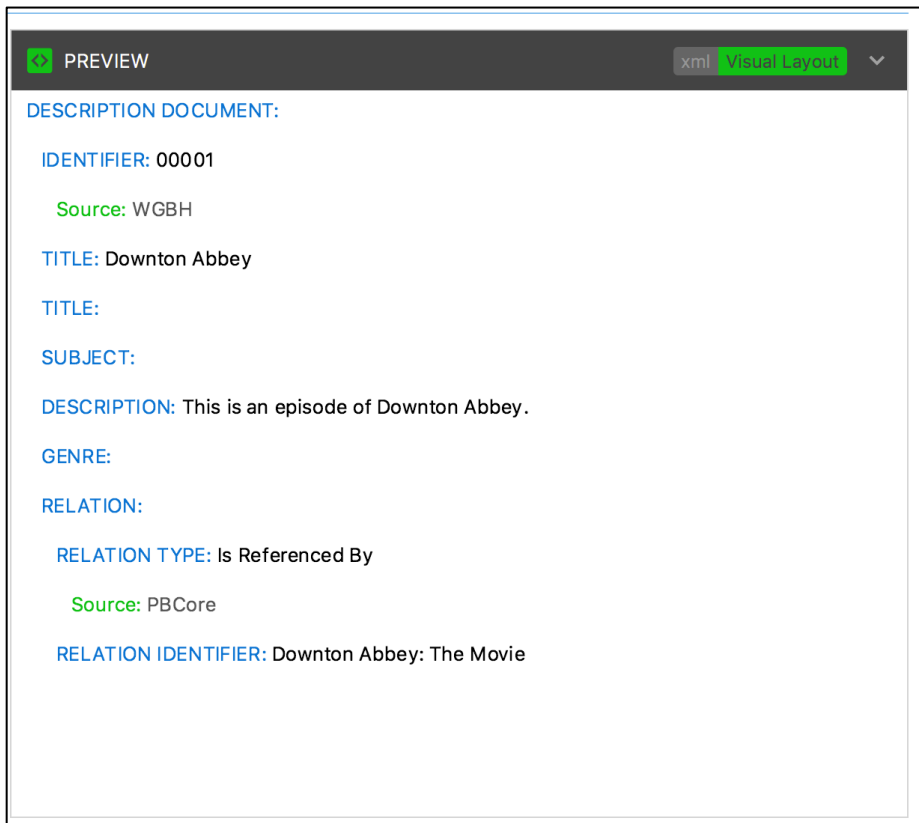
10. If you add an element field to a record but then decide you no longer need or want it, you can delete it from the record by clicking the gray 'x' to the left of the element field.
11. If you would like to duplicate an element—for example, to add another title to the record—you can click on the blue duplication icon to the right of the element field.

This screenshot shows the 'ELEMENTS' interface with the 'Title' element selected in the 'REQUIRED ELEMENTS' list. The 'ROOT ELEMENT' is 'Description Document' with a small blue '+' icon. The 'ELEMENT VALUE' field contains 'Downton Abbey'. In the 'REQUIRED ELEMENTS' list, 'Identifier', 'Title', and 'Description' are shown. The 'Title' element is highlighted in blue, and a small blue '+' icon is visible next to it. Blue duplication icons are present next to 'Identifier', 'Title', and 'Description'. The 'OPTIONAL ELEMENTS' section is empty.

12. If you would like to add sub-elements to an existing element, you can click the small blue + icon that appears next to that element to view only the sub-elements for that element.



13. As you create the record, changes will be previewed along the right-hand side of the tool. The tool defaults to the human-readable 'Visual Layout.'





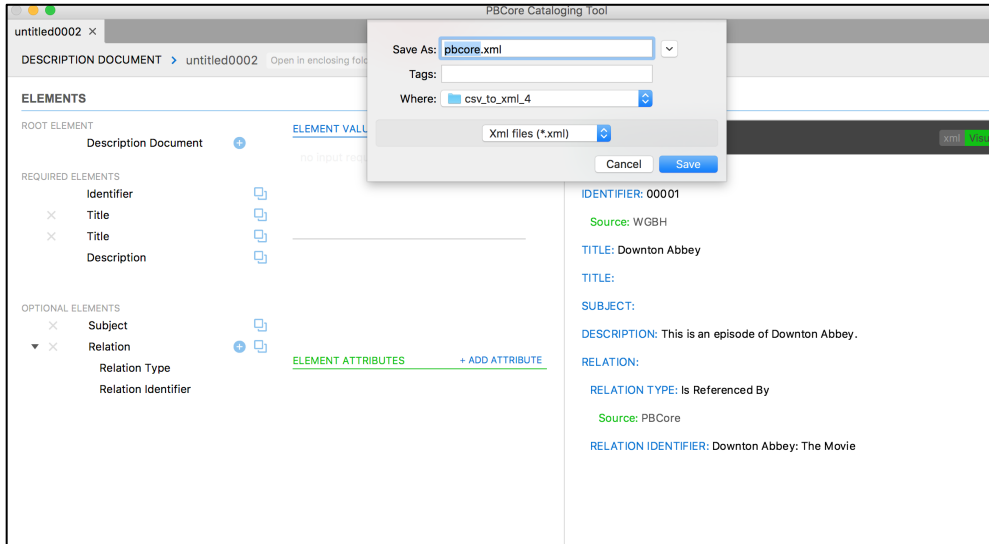
14. By clicking the 'XML' button next to 'Visual Layout,' you can instead preview the XML as it is created.

```
PREVIEW [xml] Visual Layout
1 <?xml version="1.0" encoding="UTF-8" standalone="no"?>
2 <pbcoreDescriptionDocument xmlns="http://www.pbcore.org/PBCore/PBCoreNamesp
ace.html" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi
:schemaLocation="http://www.pbcore.org/PBCore/PBCoreNamespace.html https
://raw.githubusercontent.com/WGBH/PBCore_2.1/master/pbcore-2.1.xsd">
3   <pbcoreIdentifier source="WGBH">00001</pbcoreIdentifier>
4   <pbcoreTitle>Downton Abbey</pbcoreTitle>
5   <pbcoreTitle/>
6   <pbcoreSubject/>
7   <pbcoreDescription>This is an episode of Downton Abbey. </pbcoreDescripti
on>
8   <pbcoreGenre/>
9   <pbcoreRelation>
10     <pbcoreRelationType source="PBCore">Is Referenced By</pbcoreRelationTyp
e>
11     <pbcoreRelationIdentifier>Downton Abbey: The Movie</pbcoreRelationIdent
ifier>
12   </pbcoreRelation>
13 </pbcoreDescriptionDocument>
14
15
```

15. To minimize the Preview window, click the small arrow to the right of the 'Visual Layout' button.

The screenshot shows an XML editor window titled 'pbcore.xml'. The main area displays a tree view of the XML document structure. The root element is 'Description Document', which contains a 'Description' element with the value 'This is an episode of Downton Abbey.'. Below the root element, there are sections for 'REQUIRED ELEMENTS' and 'OPTIONAL ELEMENTS'. The 'REQUIRED ELEMENTS' section includes 'Identifier', 'Title', and 'Description'. The 'OPTIONAL ELEMENTS' section includes 'Subject', 'Genre', and 'Relation'. The 'Relation' element is expanded to show 'Relation Type' and 'Relation Identifier'. At the bottom of the editor, there is a 'PREVIEW' button and a 'Visual Layout' button with a small arrow to its right.

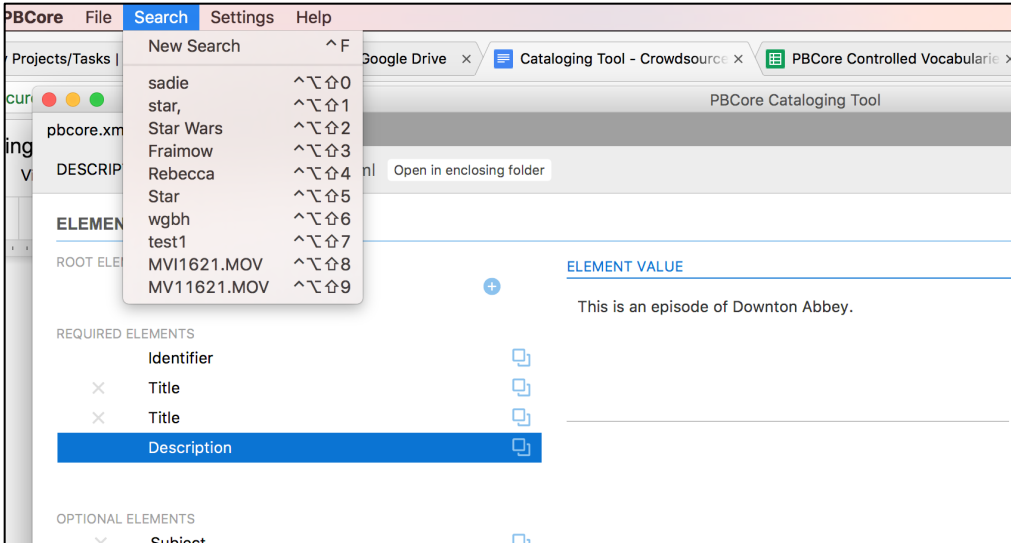
16. The same arrow can be clicked to bring the Preview window back to its spot on the left of the screen.
17. As you are editing, you will see a red 'Save Document' button along the top of the tool. This document will appear red as long as there are any unsaved changes in the document. The first time you click this button for a new document, you will be prompted to choose a name for the new document and a location to save it in. Keep in mind that the tool defaults to your last indexed folder.



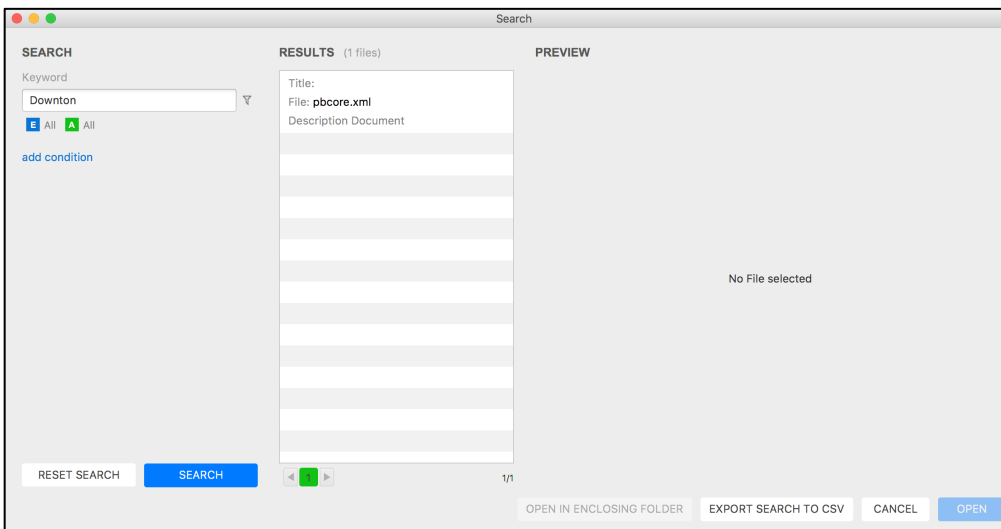
18. After the record has been saved for the first time, clicking the 'Save' button will not open any prompts. Records can also be saved from the 'File' drop-down menu. Please note that once records are saved within a folder, the folder must be re-indexed for those records to become searchable. To reindex records, navigate to the 'Directory Crawling' menu and repeat the directory crawling steps described above.

## Search

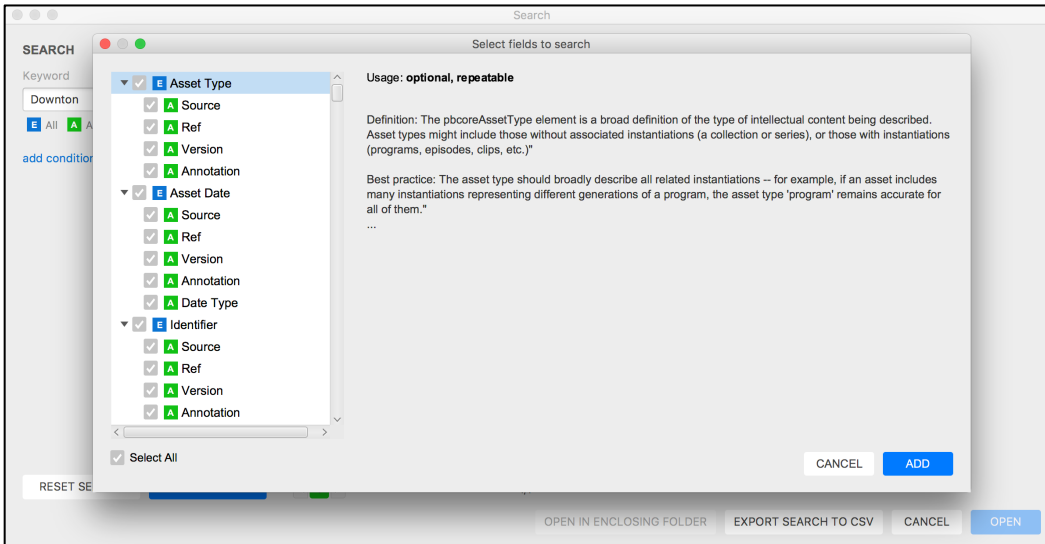
1. To conduct a search, click on 'Search' from the navigation menu at the top of your computer screen. Then, click 'New Search.' You can also use the keyboard shortcut 'Command/Ctrl F' to begin a search. You will then be directed to the Search screen.



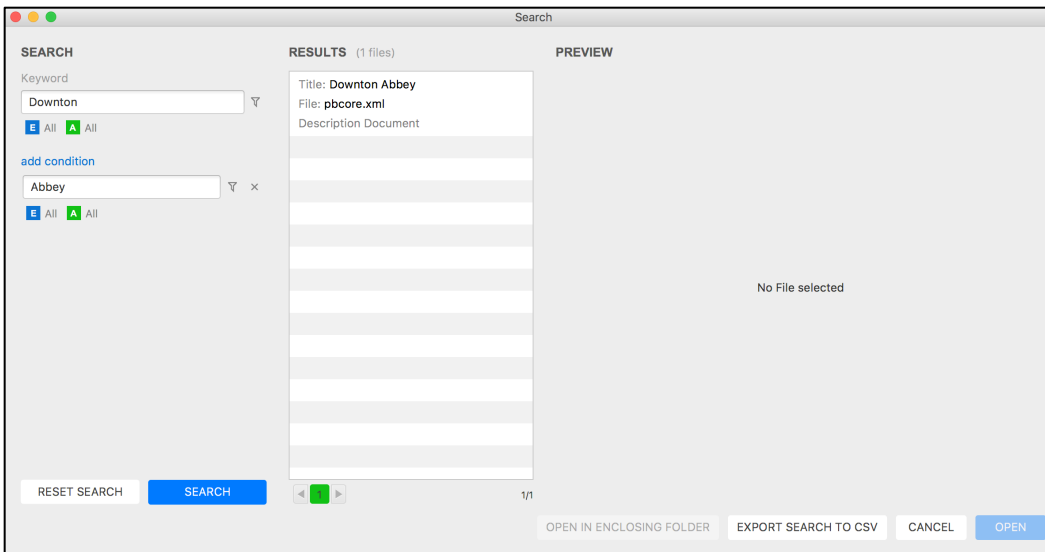
2. Before conducting a search, you must perform a directory crawl to select a directory from which to search metadata records. See “Getting Started” documentation for information about how to perform a directory crawl.
3. Once a directory has been selected by the user, you can conduct a keyword search using the search box on the Search screen. Type your keyword(s) in the search box and click “Search” at the bottom of the screen.



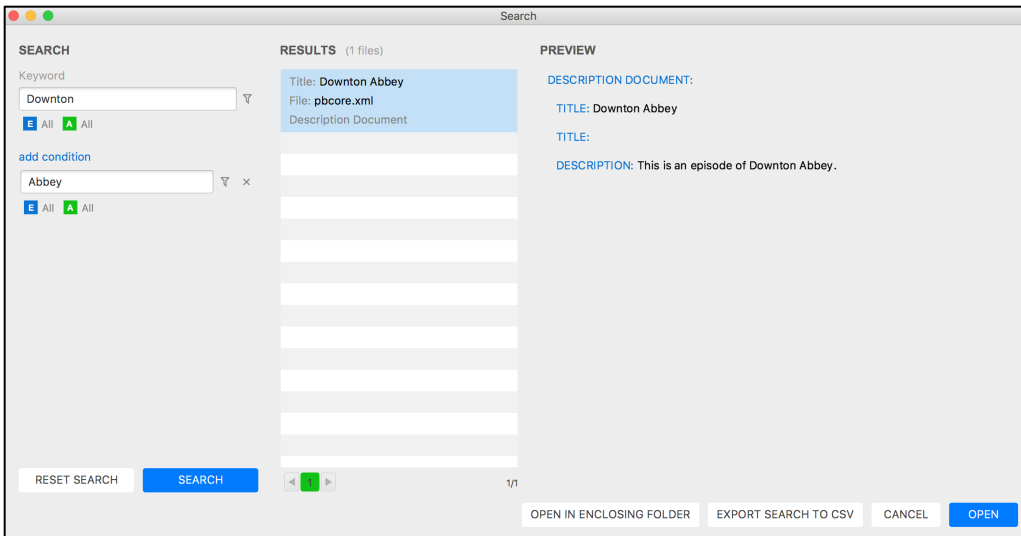
4. You can also conduct a search within specific metadata fields by clicking the funnel icon that appears to the right of the search box. After you click on the funnel icon, a screen will appear for the user to select one or more fields to search. On this window, you can uncheck boxes for fields that you do not want searched. After the search fields are selected, click “Add.” You can edit your selected fields by clicking the funnel button again.



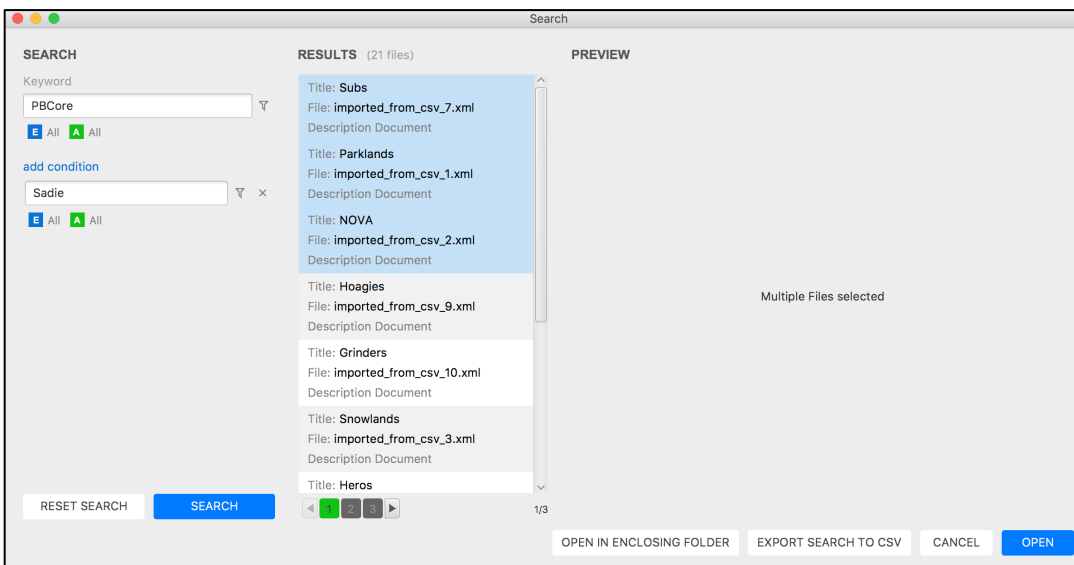
- To add boolean logic, click 'Add Condition.' Please note that the tool only performs 'AND' searches.



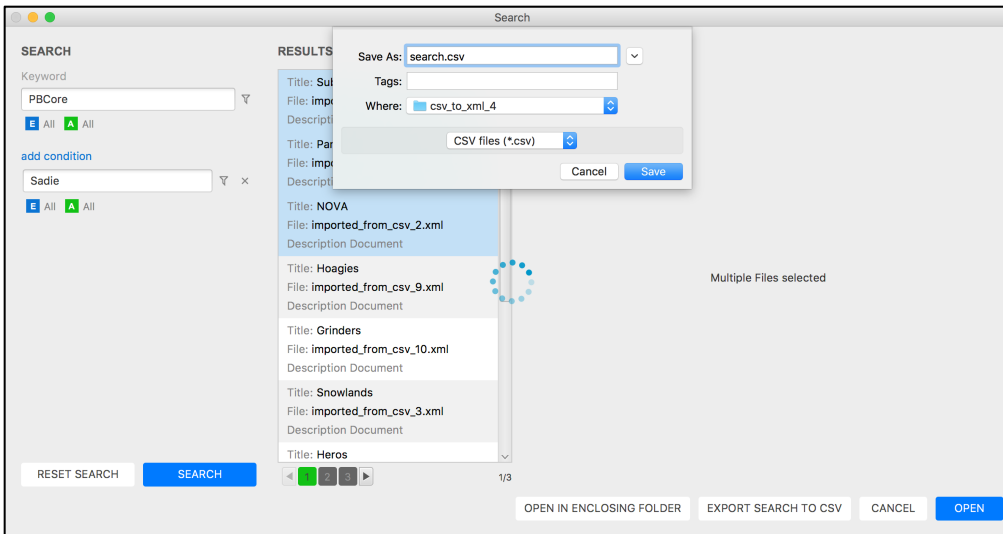
- After a search is performed, the search results will appear to the right of the search box. A user can click on a search result to preview it in the search screen. To open a record, click 'Open.'



Multiple files can be selected and opened at once.



7. To export the search results to CSV, click 'Export search to CSV.'



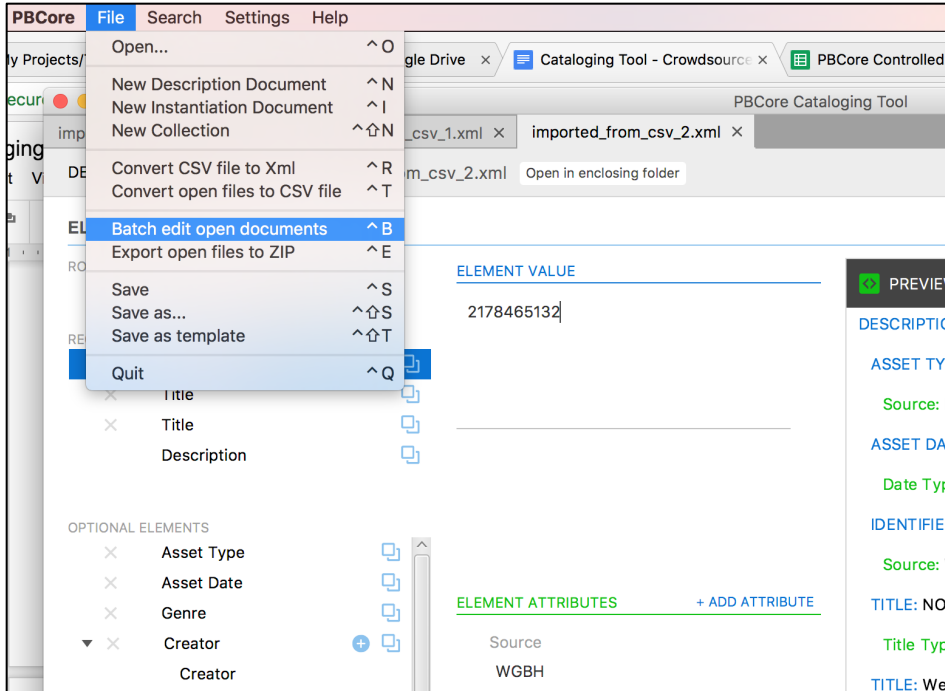
This will create a standard PBCore CSV document containing all the element and attribute information recorded in the records.

A1	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	AssetType1	@source_As	@ref_Asset1	@version_A1	@annotator	AssetDate1	@dateType_	@source_As	@ref_Asset1	@version_A1	@annotator	Identifier1	@source_Idc	@ref_Identif	@version_Id	@annotator	Title1	@titleType_
2	Episode	PBCore				5/20/80	broadcast					1234e5yrthf	WGBH				NOVA	Series
3	Program	PBCore				5/30/88	broadcast					1389562	WGBH				Sandwiches	Program
4	Program	PBCore				7/7/78	broadcast					8946513268	WGBH				Grinders	Program
5	Program	PBCore				5/1/80	broadcast					49784513	WGBH				Heros	Program
6	Episode	PBCore				2/1/75	broadcast					4515987465	WGBH				NOVA	Series
7	Program	PBCore				4/7/65	broadcast					4653278	WGBH				Subs	Program
8	Program	PBCore				9/1/70	broadcast					4651325678	WGBH				Hoagies	Program
9	Episode	PBCore				2/1/80	created					566797465	WGBH				NOVA	Series
10	Episode	PBCore				2/1/84	broadcast					15984651	WGBH				NOVA	Series
11	Episode	PBCore				6/20/80	created					2178465132	WGBH				NOVA	Series
12																		
13																		
14																		
15																		
16																		
17																		
18																		
19																		
20																		

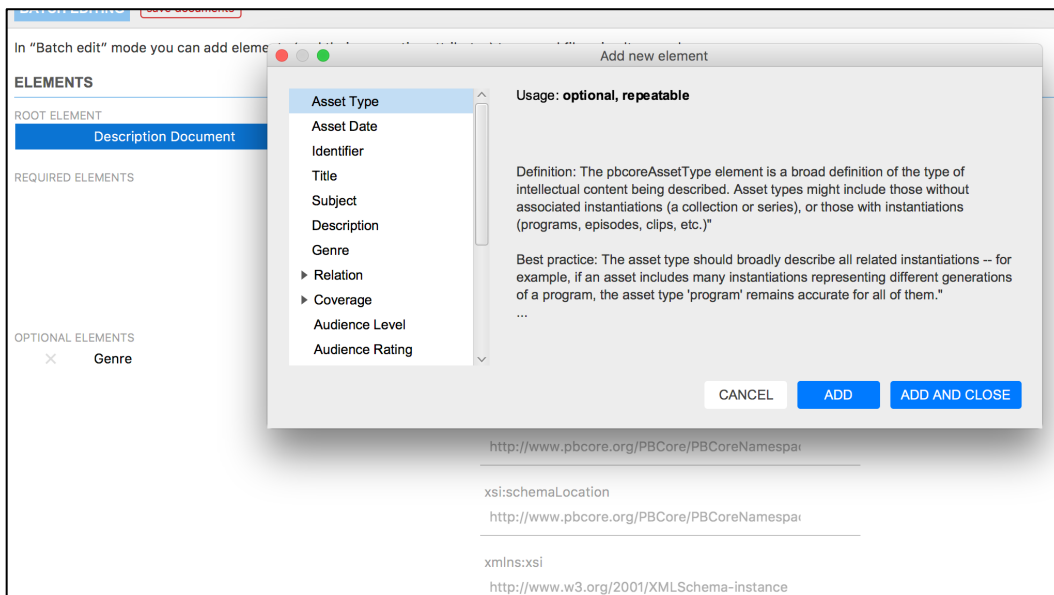
## Batch Edit

In Batch Edit mode you can add elements (and their respective attributes) to many files at once. All the files you are editing must be open in order to edit them. You cannot edit existing elements; you can only add new ones. When batch editing multiple records, no elements will be replaced and only repeatable or previously non-existent elements on the files will be added. Below is a step-by-step guide for this process.

1. Open documents that you would like to edit.
2. From the File menu, select 'Batch Edit' to reach the Batch Edit screen.

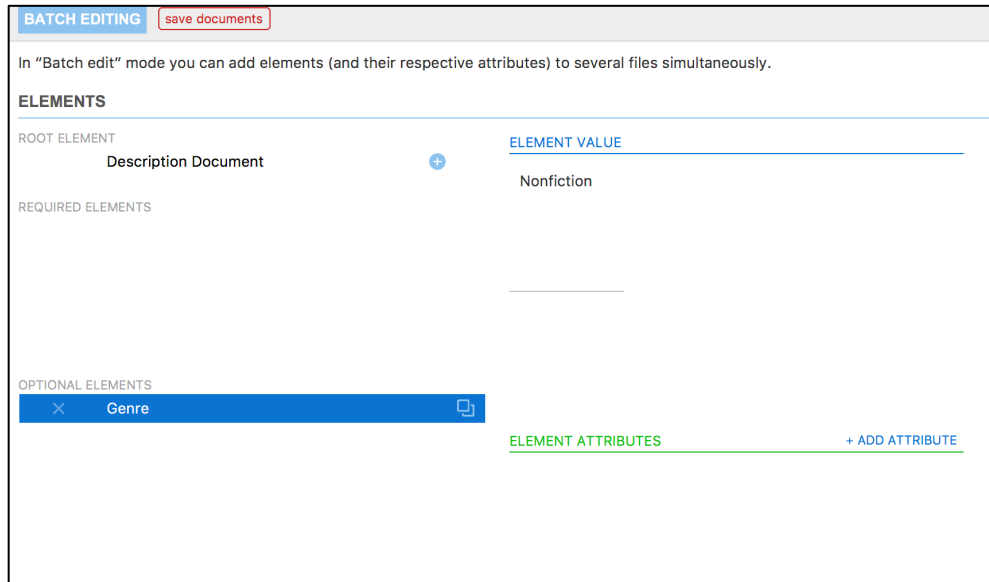


3. On the Batch Edit screen, select the 'Add new element' ('+') icon next to Description Document (itself under the Root Element heading)

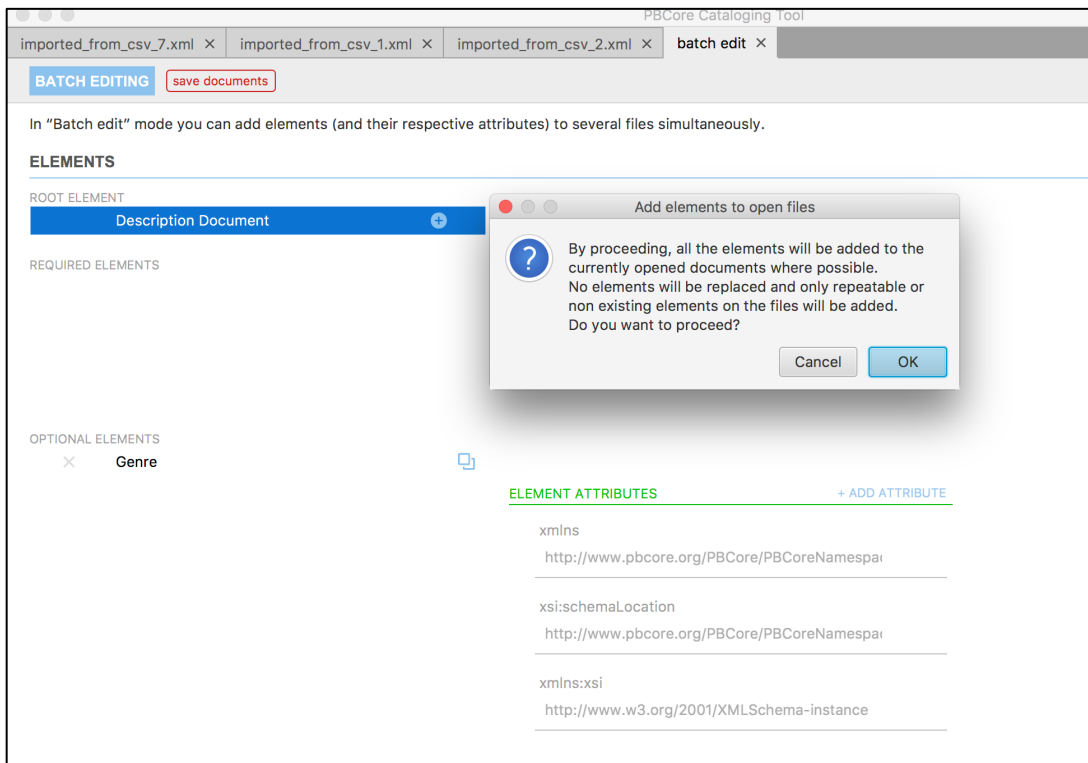


4. Make desired changes, adding new element(s)/attribute(s). Note: elements and attributes are often repeatable.
  - a. Element Value. A value is required once the element has been added. Simply enter your value in the 'Element Value' field.

- b. Attributes. If assigning element attributes, select 'Add Attribute' and choose an attribute from the 'Add new attribute' pop-up list. Finally, enter your attribute's value.



5. When you have made all your desired changes, select "Save Documents" at the top of the screen. Since these record additions will affect all open documents, the tool will bring up a confirmation screen to ensure that you wish to make this change.

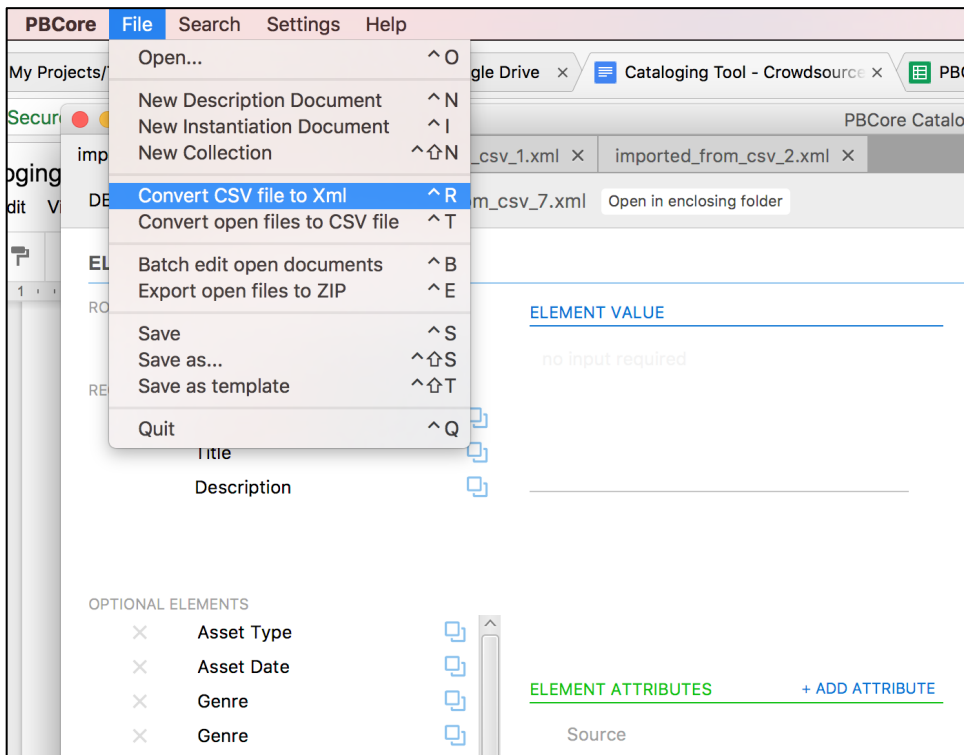




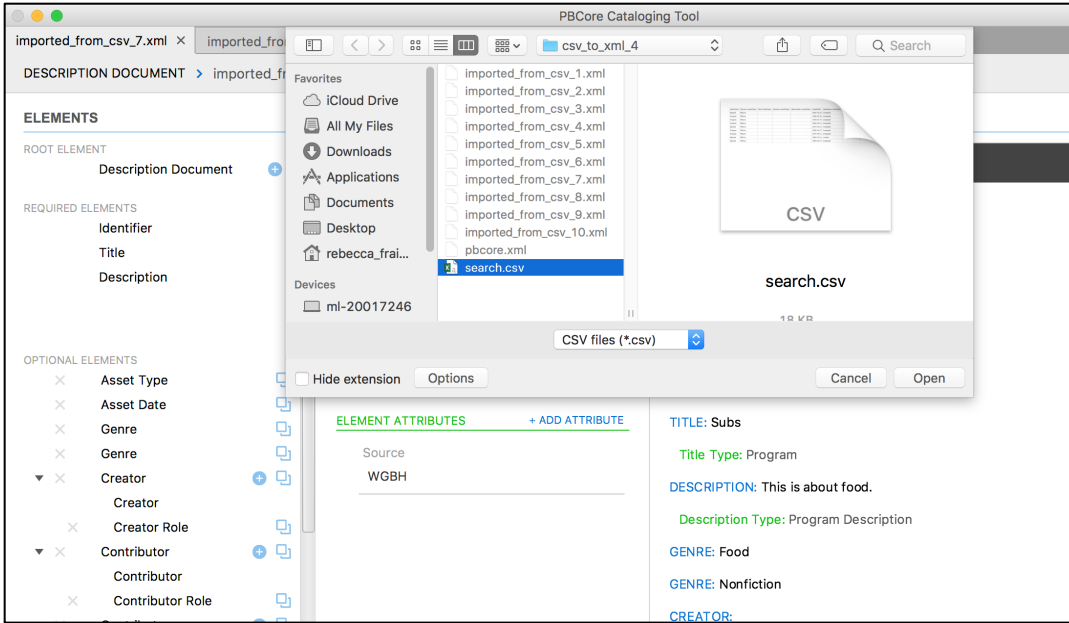
Hit 'OK' to apply the desired change across all records.

## Create Records From CSV

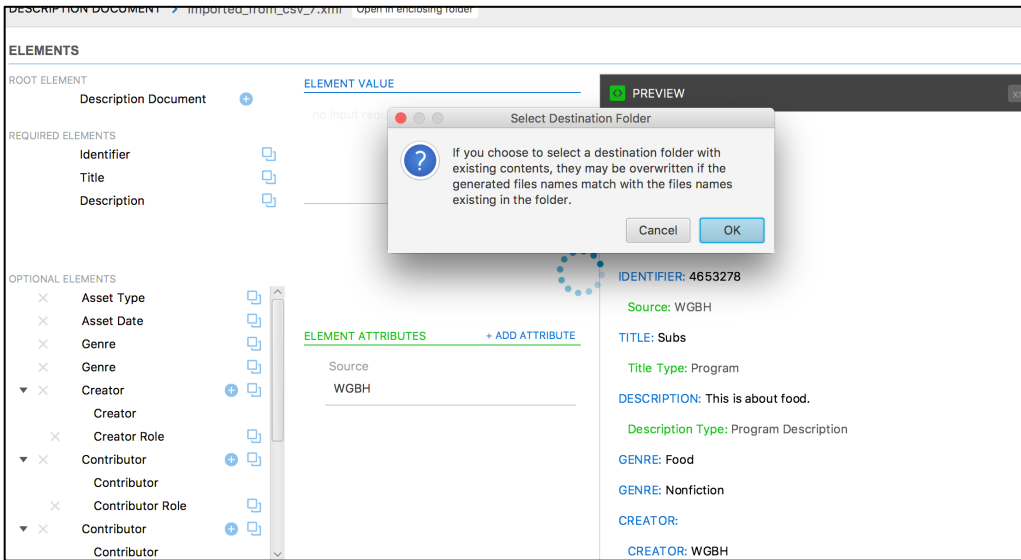
1. The PBCore tool can only import records from a PBCore-compliant inventory spreadsheet. To download the inventory spreadsheet, visit [the inventory spreadsheet page on the PBCore website].
2. To import data from a spreadsheet and create XML records, go to the File menu and select 'Convert CSV file to XML.'



3. A window will open asking you to select the desired CSV file. Identify it and click 'Open.'



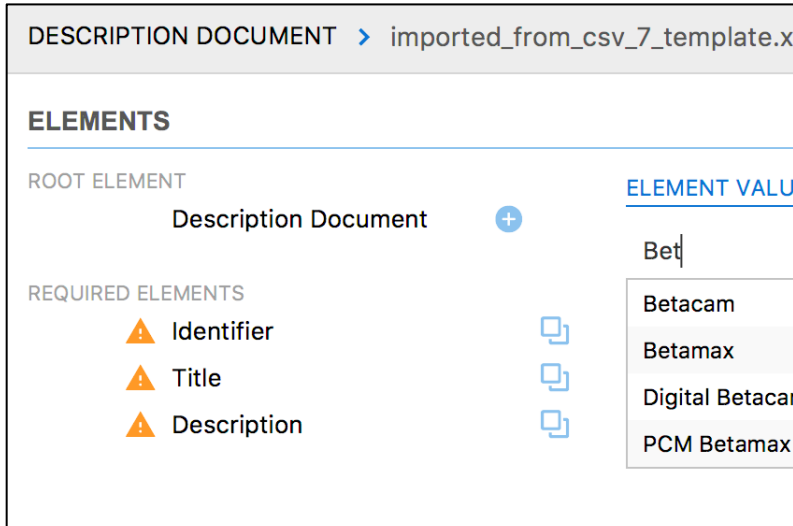
- The next window will ask you to select a destination folder for the files. By default, the files will be named imported\_from\_csv\_1.xml, imported\_from\_csv\_2.xml, imported\_from\_csv\_3.xml, etc. The tool will warn you that these file names may overwrite files with the same names if they exist in the same folder.



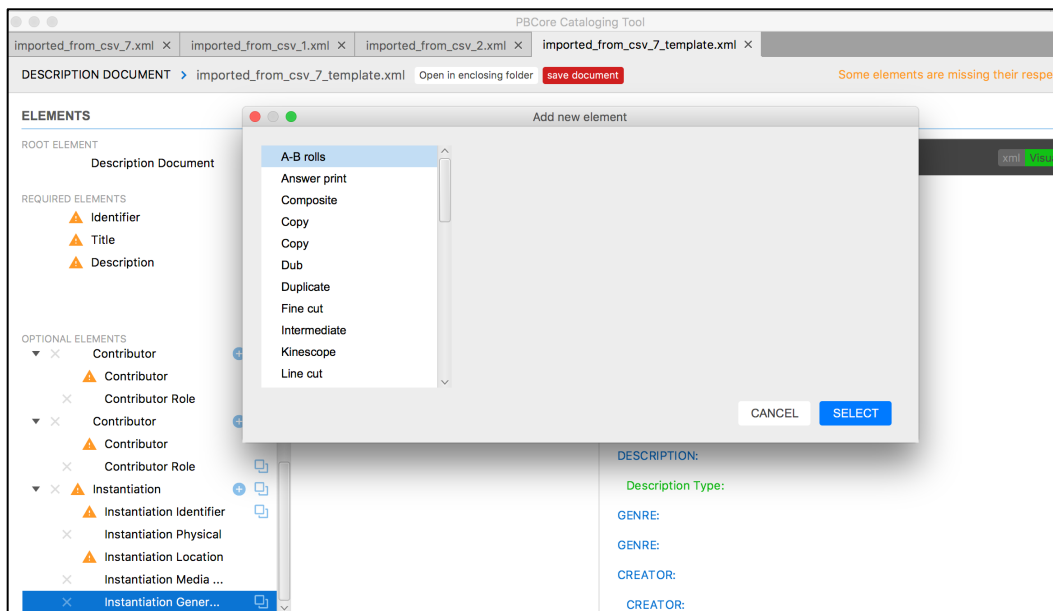
- Once you have selected the folder in question, click 'Open.' The new records will appear in that folder and can be indexed and searched by the PBCore tool.

## Controlled Vocabularies

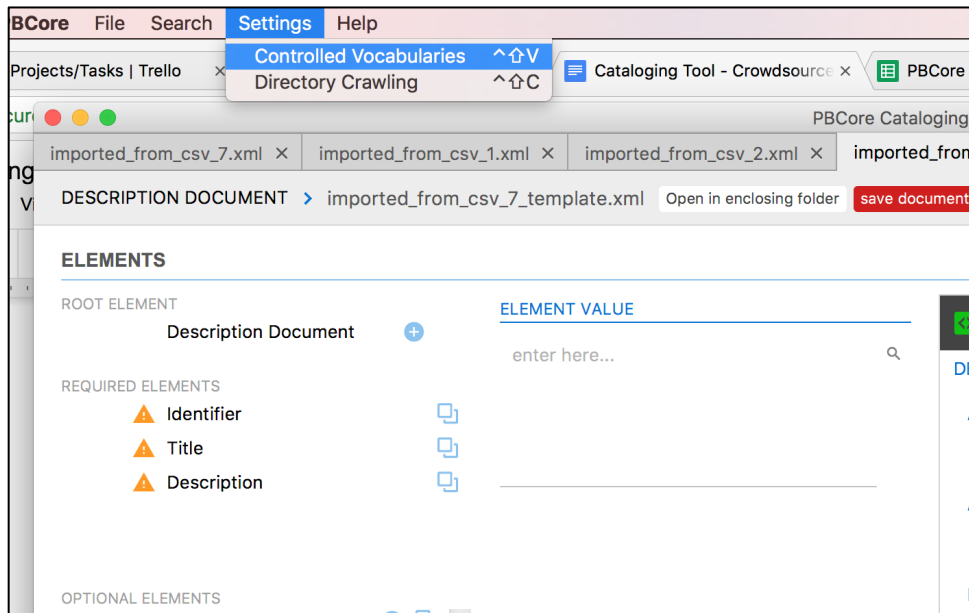
1. The PBCore tool comes pre-loaded with PBCore Controlled Vocabularies. By default, controlled vocabularies will appear as drop-downs that can be selected when a user starts typing in a field that has a PBCore Controlled Vocabulary.



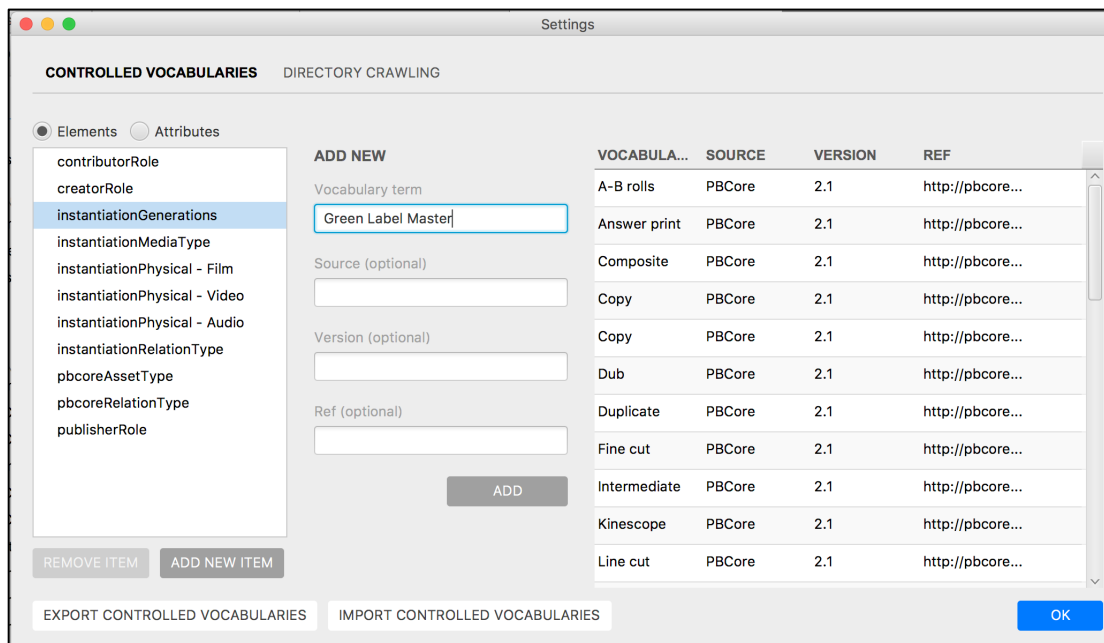
2. If a user wishes to see all possible controlled vocabulary terms for an element, they can click the magnifying glass next to that element to bring up the list of possible terms and select the appropriate one.



3. Institution-specific terms can be added to the controlled vocabularies from the Controlled Vocabularies menu, which can be reached by going to 'Settings' and then clicking 'Controlled Vocabularies.'



- Once in the Controlled Vocabularies menu, you can select any given vocabulary and add a new term, including optional Source, Version, and Ref attributes that will automatically fill in when the term is selected.

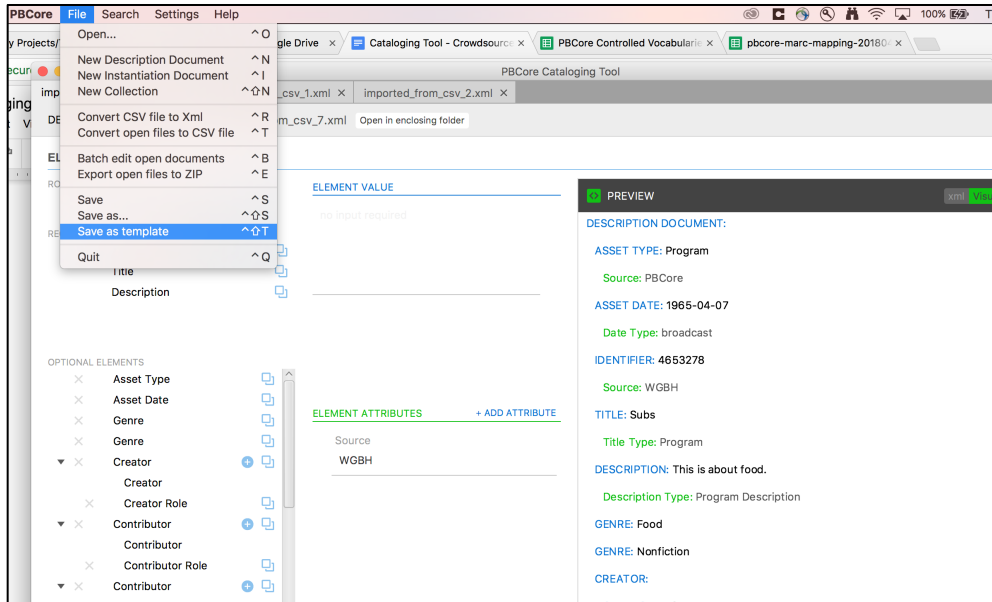


- You can also export controlled vocabularies, edit them, and re-import them to create new controlled vocabulary fields for other elements that do not have pre-existing controlled vocabularies.

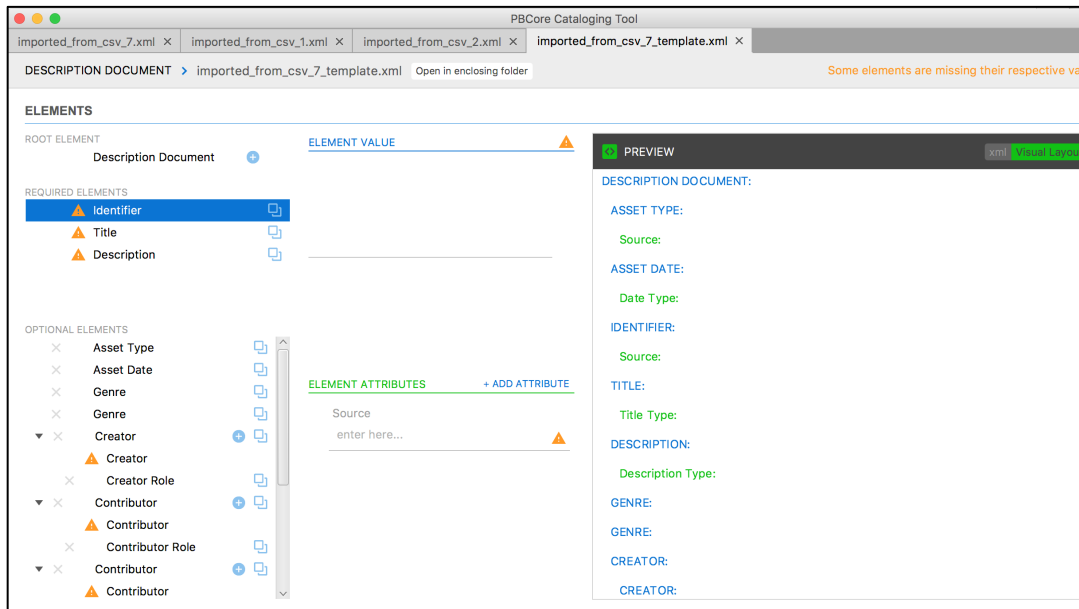
## Creating Template Records

Any record in the tool can be saved as a blank template record. When opened, a template record will have all the same element and attribute fields as the record that served as the template's basis, but those fields will be blank to allow the addition of other values.

1. To save any record as a template, click the 'Save As Template' button in the File menu.



2. Any template record can be opened from the File menu by clicking 'Open' and selecting the record, with blank fields ready to be filled out.



## **PBCore Document Types**

In most cases, users will want to create a new Description Document. This allows you to use PBCore elements like Title, Description, Subject, and Creator to describe the content of an asset, such as a film, an episode of television, or a raw footage interview. Description Documents can (but do not have to) have one or more Instantiations. An Instantiation is a file, tape, or other asset that contains the content described in the record. A complete Description Document record might include descriptive information about a raw footage interview, as well as information about the tape on which the interview was originally shot, and the digital file that now contains the interview.

An Instantiation Document does not include descriptive information. It is used to describe the specific technical characteristics of tape, media file, or other individual item. You may want to create an Instantiation Record if you just want to create an inventory of your physical media, and you don't know enough about the content to create a Description Document. But often there is enough information on tape labels to warrant the creation of a Description Document during the inventory phase.

A Collection groups many Description Documents together into a single record. You may want to create a Collection Document if you have a number of Description Documents that you would like to link together in one record. However, in most cases, we recommend creating individual Description Documents rather than creating a single Collection Document, as individual documents are easier to manipulate and batch edit.

Once you have decided what kind of record you would like to create, select that option from the file drop-down menu. You are now in the Document Edit field for the type of record you have chosen.