



## Uploads and metadata

### File/Folder structure

All files (images, video, audio, etc.) to be included in the repository must be accompanied by a metadata spreadsheet (.xls or .xlsx format). Files with no metadata spreadsheet, or not referenced in the spreadsheet will *not* be included in the repository. In addition to the files and the metadata, two kinds of permission forms are required:

- cIRcle license - permission from the creator of the content to release the files under a Creative Commons License (must answer YES to both questions so that the UBC Library can host and display the files and others can reuse them)
- Consent for Disclosure of Personal Information (Release form) – release required from every identifiable person appearing in a file (face visible in an image/video, voice heard in an audio recording)

The above forms must be provided for all relevant material (one form per person per trip). They will be kept on file by project staff, but will not be part of the public repository.

For convenience and clarity, we have organized the upload area on OwnCloud into separate areas for each project cluster. There are separate folders for material intended for the repository (material for future research and educational use) and material for project publicity and other purposes (for example, group photos of participants).

When uploading material, look for the folder of repository material for your cluster, and create a new folder for each trip (e.g., “2019 Trip to Kyoto”). Within that folder, create folders for licenses from the content creators (“cIRcle Licenses”) and for permission forms signed by the individuals appearing in the media (“Individual Releases”).

The forms can be uploaded as PDFs or image files (a good quality photo taken with a camera or phone is fine, as long as it is clear and readable), and the filename should contain the name of the person signing them (e.g., “ZhangMing\_License.pdf” or “NakamuriYuki\_Release.pdf”). The cIRcle License must be in English. Releases for individuals depicted are being supplied in bilingual versions (Chinese, Japanese, and Korean); you may use these or the English version. Ensure that the person’s name in the Latin alphabet (pinyin, romaji, etc.) is clearly legible and that the same form is used in the metadata and the filename.

Data for the repository (images, video, audio, transcripts, etc.) should be organized into folders for each day of the trip. Especially if there are many files for a given day, we recommend creating further subfolders for each creator (photographer, videographer, etc.—the person who created the file and holds copyright on it). This is not a requirement, and in some cases it may make more sense to put items created by multiple creators together (for example, audio recorded by one person and transcribed by another).

Each folder of content should contain one metadata spreadsheet (“Metadata.xls” or “Metadata.xlsx”) describing the files (multiple kinds of media can be included in a single folder).

The same basic folder structure should be used for material not intended for the repository (“Other Uploads”).

See the chart below for the file and folder structure. Items marked with a bullet (●) are files, the rest are folders.



FROGBEAR Repository
Cluster 1.1
2017 Trip to X
Creator Permissions
• A_Permission.pdf
• B_Permission.pdf
• ...
Individual Releases
• X_Release.pdf
• Y_Release.pdf
• ...
2017 06 10
Photographer A
• Metadata.xls
• IMG_1.jpg
• IMG_2.jpg
• ...
Photographer B
• Metadata.xls
• IMG_1.jpg
• ...
Videographer A
• Metadata.xls
• Video_1.mp4
• ...
2017 06 11
2017 06 12
...
Cluster 1.2
Cluster 1.3
...
FROGBEAR Other Uploads
Cluster 1.1
2017 Trip to X
2017 06 10
Photographer A
• Metadata.xls
• IMG_X1.jpg
• IMG_X2.jpg
• ...
Videographer A
• Metadata.xls
• Video_1.mp4
• ...
2017 06 11
Photographer A
...
2017 06 12
...
Cluster 1.2
Cluster 1.3
...



### Basic metadata concepts

Every row in the spreadsheet represents a record, which will appear as a single unit in the online repository. It may contain multiple items (files), such as a set of images of the same object or site, multiple segments of video, or an audio recording and a text transcript of the recording. They must all be related enough to be described by a single title and set of keywords. The metadata fields and standards are described in a separate section; below are some key concepts and techniques for filling in the metadata spreadsheet.

Some fields are *required*, meaning that the metadata will not be accepted unless the field is completed. *Optional* fields may be left blank. If a *required* field is missing, we will not be able to process the upload and will contact the cluster for more information.

Some fields are marked “Repeatable (|)”. This means that they can contain multiple values, which should be separated by double vertical line characters (||, the vertical line is entered with shift-backslash on most keyboards). An example of a Repeatable field is Language: if a text contains material in both Chinese and Sanskrit, the language field should read “Chinese||Sanskrit”. Similarly, the Creator field should record the names of all persons who created items in the record, for example, “Doe, Jane||Zhang Ming||Park Sol Jeong”.

The field that links the metadata in the spreadsheet to the material in the data files is the Filename(s) field. This must contain one or more filenames, including the extension (.jpg, .mp4, .mp3, etc.) but without no folder/path information. The files must be in the same folder as the metadata spreadsheet. Multiple filenames should be separated by double vertical lines (||).

It is important that filenames appear in the spreadsheet *exactly* as they do in the folder, otherwise we will not be able to link the two. In general, we do not recommend trying to give the files meaningful names—the metadata provides the description, so the filename does not need to. Using the default filenames that come from recording devices (e.g., IMG\_12345.jpg) is fine. Filenames should only contain Latin characters, digits, and underscores—no East Asian characters or other punctuation/symbols.

To ensure that filenames are correctly inserted into the spreadsheet, we recommend the following workflow:

1. Organize data files into folders, following the above guidelines
2. Copying an empty metadata template spreadsheet (metadata.xls or metadata.xlsx) into each folder
3. Copying the file list and pasting it into the Filename(s) column of the metadata spreadsheet (see instructions below)
4. Filling in metadata records, consolidating multiple filenames into single records as needed

Alternatively, in Step 3, instead of copying the list directly into the metadata spreadsheet, you can create a separate spreadsheet and copy the files into it. This may be easier if you anticipate having many records with references to multiple files.

### How to create a file list

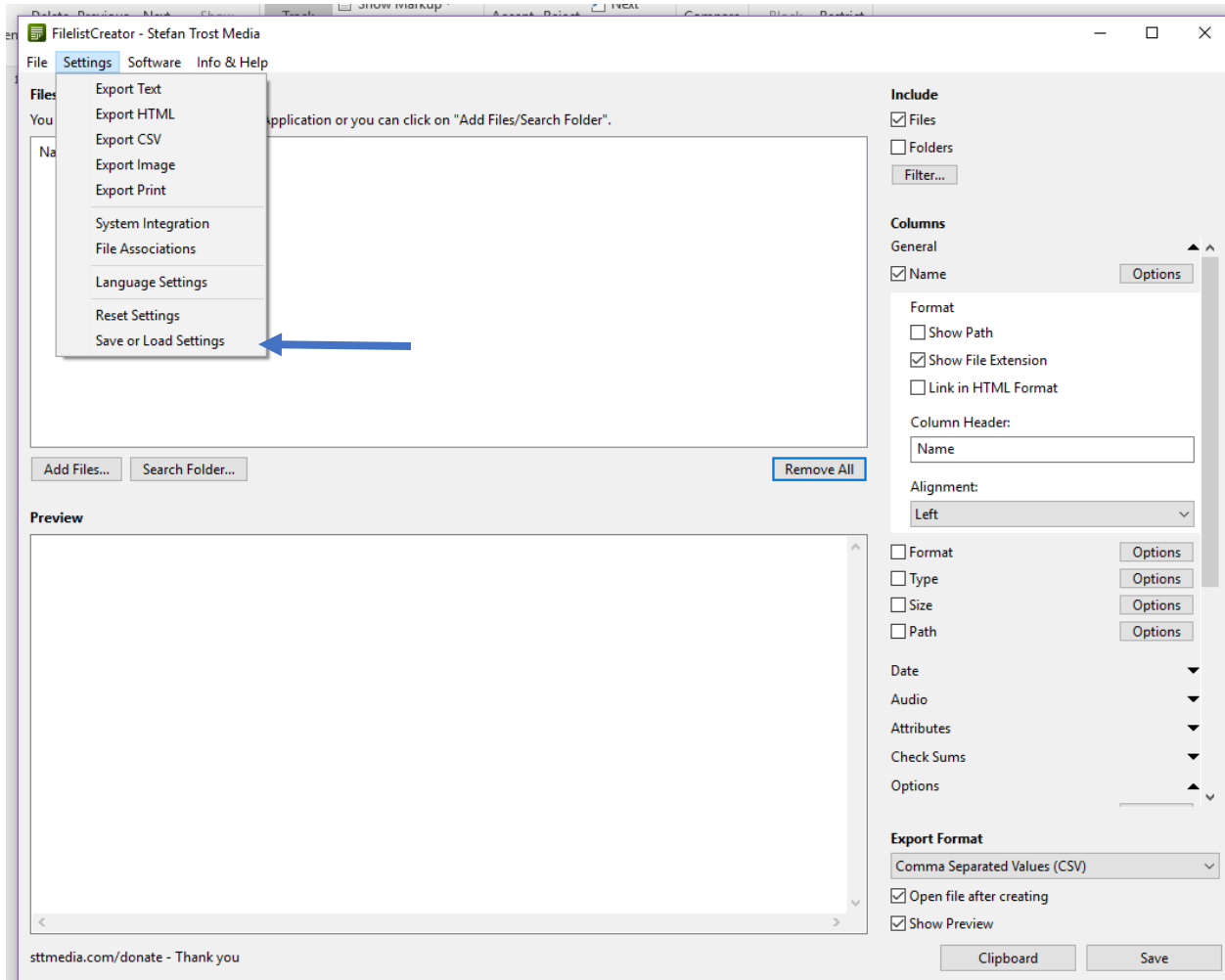
Copying filenames individually, or typing them in by hand, is tedious and error-prone. We recommend following one of the two procedures below:

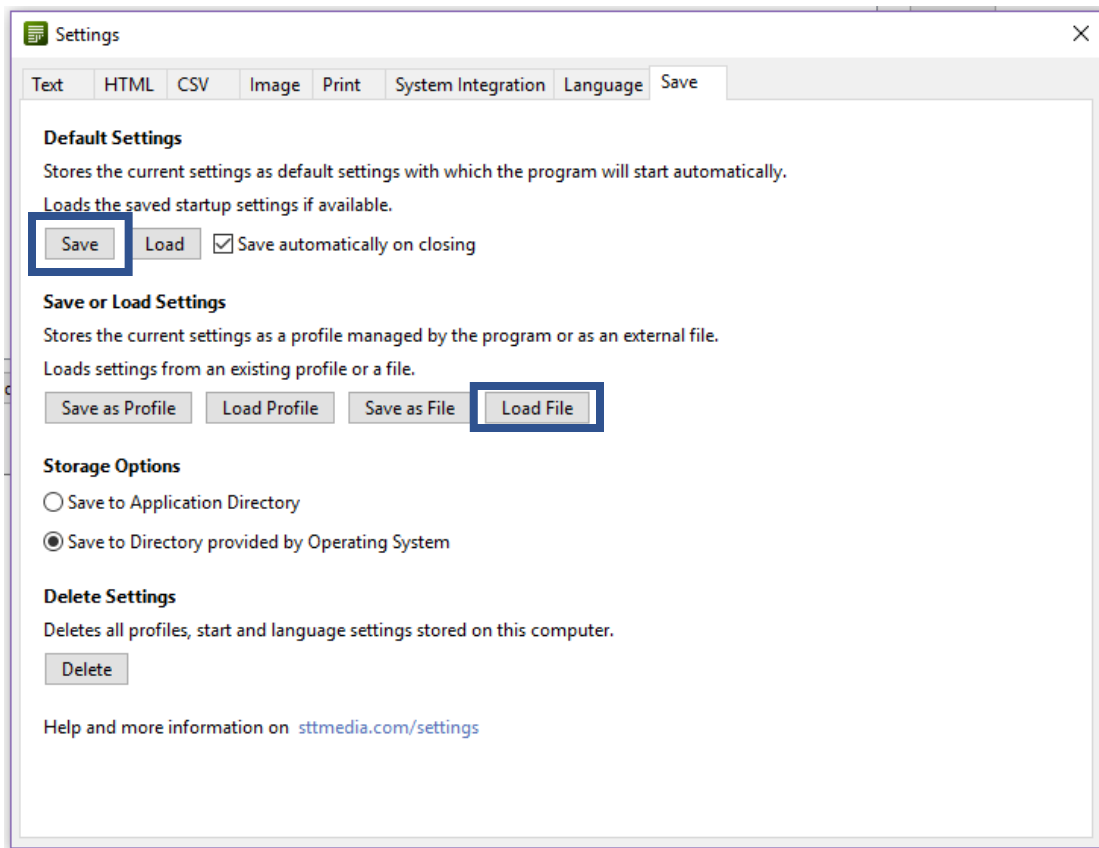
#### *Method 1: FilelistCreator (free software)*

FilelistCreator is a free program for creating lists of files. It is available for Windows, Mac, and Linux at <http://www.sttmedia.com/filelistcreator-download>.

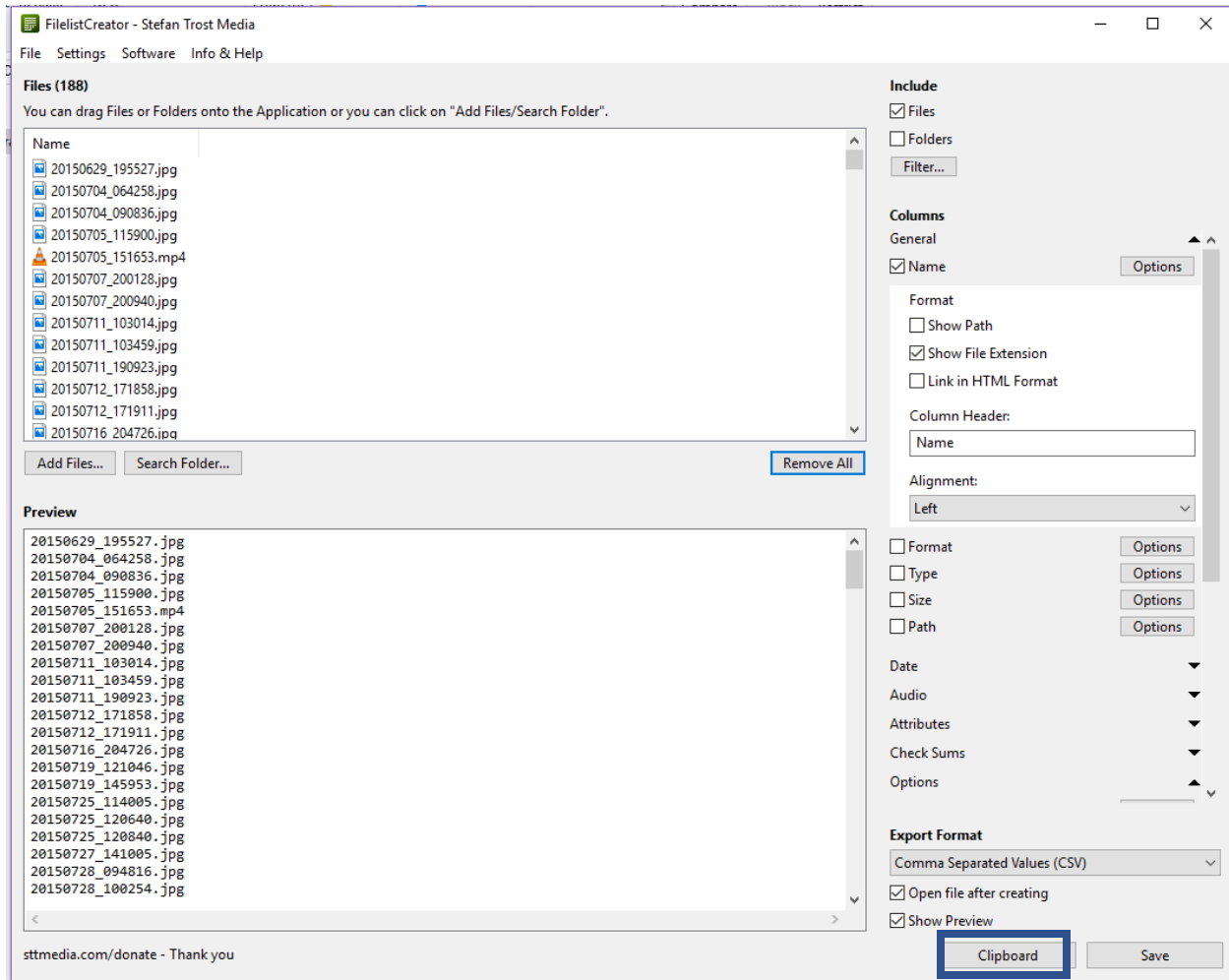


1. Run FilelistCreator by following the instructions on the website above. On Windows, it does not need to be installed, just copied to a convenient location on your hard drive.
2. Save the attached profile in a convenient location (e.g., the folder with the FilelistCreator program). This profile contains the appropriate settings (set to export only filenames, with no additional information such as file size, folder name, etc.). This can also be found in the “FROGBEAR Documentation and Utilities” folder on OwnCloud.
3. Run FilelistCreator, and load the profile by choosing from the top menu Settings → Save or Load Settings. In the dialogue that appears, under “Save or Load Settings,” click the “Load file” button, then choose the FROG\_Metadata.flis file. This will load the settings and a pop-up window will confirm that they have been loaded. On the settings page, under “Default Settings,” click “Save.” This will save these settings so that they are the default every time you start the program. Close the Settings dialogue.





4. You are now ready to move file lists into the metadata spreadsheet. Drag the folder of material onto the program window (from Windows Explorer, OS X Finder, etc.). It will fill the Files box with a list of files in that folder. Alternatively, you can use the “Search Folder...” button to choose a folder to add to the list. The top part of the window shows the files to be listed; the bottom Preview area shows the list as it will be formatted. There should be only one column, with the filename, and no folder or filesize information. If other information appears here, reload the FROG\_Metadata.flx profile as described above.



5. To copy the list to the metadata template, click the Clipboard button on the bottom right of the FilelistCreator window to copy the list to the clipboard. Then open the template spreadsheet in Excel or another program. Find the filename column and select the first blank cell under the header column. Then paste (ctrl-v on Windows, command-v on Mac). The rows below will fill with the filenames.

### *Method 2: Copy-and-Paste*

If you are not able to run FilelistCreator, you may also copy a list of files from your system directly into the spreadsheet.

In Windows, open the folder in Windows Explorer and select the files whose names you wish to copy, **hold down Shift** and right-click on the selected filenames, then from the menu that appears choose “Copy as path.” Go to the Filenames column in the spreadsheet and paste. This will paste the complete filenames include the full folder path, e.g., “C:\Users\YourName\Photos\FrogBear\2017-06-15\IMG\_12345.jpg”, but the metadata should *not* include the path, just the filename. To fix this, in your spreadsheet choose a filename, copy the text in the cell, then perform a search-and-replace throughout the spreadsheet for the folder portion (in this case, “C:\Users\YourName\Photos\FrogBear\2017-06-15\”).

In OS X, open the folder in Finder, select the files (CMD-A to select all), copy (CMD-C), then in the first blank cell in the Filenames column paste (CMD-V). This will paste a file list including extensions.



### Creating Records

Some individual files will become individual records in the repository, but others will be grouped into records describing multiple files. To do this, in the spreadsheet choose the row with the first filename that will be part of the record and start filling in the metadata. To add more files to the record, insert a separator of two vertical lines (“||”), then cut and paste the filename from another row.

If you find that you end up with gaps between records (blank row between entries), you can follow the instructions on this page to delete the blanks: <http://www.techrepublic.com/blog/microsoft-office/a-quick-way-to-delete-blank-rows-in-excel/>