Chapter 3: The Project Workspace

The Project Workspace’s home page looks as shown above. Other projects currently in OCCAMS are visible by title (obscured in the manual for privacy). You may see other people’s project titles but unless you are given access to those projects, you cannot access them. What you will see on the left panel is a list called “My Projects”. This is a quick way to navigate to your project. Either click on the My Projects link or the link in the main Project Workspace panel to access your project.

Files from the DFL are Records in the PWS. The homepage of your project will look like this when you have populated it with the various kinds of files from the DFL. There are four ways of viewing your records in the homepage: by Record Type, by Thumbnails, in List view, via Timemap and by Timemap with spatial coverage.

This section of the manual is divided into three parts: Basic Research Tools, Advanced Research Tools and Manage Project.
BASIC RESEARCH TOOLS

There is no particular order of operations for the Project Workspace. Within the Project Workspace, there are several research tools at your disposal. The PWS was designed to be flexible for researchers. This section describes the basic research tools: editing research metadata, linking files, relating records, annotating records and using the Timemap features. Additional and more advanced tools are discussed in the section following this one.

Clicking on the folder <<Cultural Object>> reveals all records that have been imported.

Editing Research Metadata

You can edit research metadata by either clicking on the thumbnail of the object or the name of the object. This allows you to edit the metadata as well as link and relate records and annotate the current record.
Linking Files
As discussed in the DFL section of the manual (see page 42), assets can be sent over to the PWS as files only. This is enable you to link multiple files to a single record and thus share the research metadata. This feature is most commonly used when showing detailed views of the same object. First, open up a record so that you are in the edit record page.

You are already in the <<Linked files>> tab. Just click on <<Add [+]>>.

You will directed to a page showing your folders in the Digital File Library. Only those files that you have sent over as files or files that you have sent over as records will be visible. Navigate to your desired files by clicking on the folder.
Opening your folder will give you a view of all the files you have available. Select all if required or simply select the individual files as illustrated. Afterwards, click on <<Link to record>>.
Your linked images will appear as illustrated. This view allows you to see the object in various views, in a single record, while not duplicating the metadata. You can also select each one individually for annotation.

The top image – the image showing the complete view of the object – is the **parent image**. The parent image is the vortex around which linked and related documents revolve. The relation is based on the make-up of the parent image.

Parent image are the first images in the list and the thumbnails in the Project Workspace.

If you initially work with a partial image and then later get a more complete image, you can change the parent image so that the desired view of an object is prioritised. The example below shows a detail as the parent image and the complete photo below. To change this, click on the <<Edit/Delete Link>> of the image you want as the parent image.
On this page, you can either delete the link altogether (remove the file from the record) or set the file as the parent image by ticking the box “Set as primary linked image”.

Hit <<Save>> and the new image will be set to the top of the screen and made the thumbnail in the PWS.

Relating Records
Related records are those other records that entail a different set of research metadata but are related in some way to the parent record. Examples of potential related records include: current museum photographs of objects and historical photographs of that same object; video about a place and photographs of that same place; paintings by an artist and the photograph of that artist; documents about an object or artist, audio recordings that talk about the object, artist or place; and any imaginable combination of relations between cultural objects, the people who made them and the places, events and histories that entail them.

The example that will be used for Relating Records is a cuff that is based on a historical basket. I want to show the relationship between the two objects. Other examples of Related Records could be (but are not limited to):

- A set of records in the same collection
- A set of records created by the same person
- A set of records in the same exhibition
- A set of records used to tell the same story
- A set of records tied to the same place
First, bring the record up in detailed view (clicking on the thumbnail or the record name link).

Click on the <<Related records>> tab. Then click on <<Add [+]>.

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**Title:** Zigzag_Cuff

**Keywords:** Cornhusk, Beaded, Beaded_Cuff

**Description:** Beaded cuffs based on a cornhusk bag from the University of Oregon, Museum of Natural History

**Creator:** Gretchen Stottle

**Date Created:** 17/05/2014

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![Image of a Zigzag_Cuff](image-url)
You will be guided to the PWS homepage as shown below. Click on your project – be sure to click on this link and not the “My Projects” link.

Navigate to the appropriate record and tick the box. You can also add a description of the relationship. Click on <<Add related record/s>> to complete the action.
Once you have related a record, it is attached to the parent record as shown.

In this view, you have the option of adding more records or editing the relationships between existing records. Related records are related to the parent object only and not to each other. If you need to relate all records to each other as well as the parent object, you can <<Batch relate all records above>>. This avoids having to repeat this step for each record.

**Annotating Images**

This function is only available in the Project Workspace. Annotating images allows you to add notes about any aspect you choose to highlight. To begin, click on any image in any category or folder within your Project. You should be directed to the edit screen as shown below in detail. Click on the link <<View/Annotate (0)>>. The number indicates the number of annotations currently noted.
A larger view of the image will appear in the annotation view of the Record. To the left of your image is the grey <<Annotate Detail>> button.

Clicking on the <<Annotate Detail>> button will provide you with the annotation dialogue box as shown. The black box on the upper left corner of the dialogue box is the outline for your annotation and is adjustable. To adjust the outline area, simply move your cursor to an edge until you get this arrow symbol: , then move to the desired size. You can move the entire dialogue box anywhere within the picture frame by placing your cursor in the middle of the outline box until you get this symbol: .

Once positioned and sized according to your needs, you might have something that looks like the figure on the left below. You can now add whatever text you want. Afterwards, hit <<OK>>. Your annotation will appear highlighted in green as shown on the right. Alternatively, you can add text first and then size the outline. The order of things is entirely up to you.
To make edits to your text, simply move your cursor into the middle of the outline box and click. You will get another dialogue box as shown below where you can edit your text or delete the annotation altogether.

Your completed annotation might look as follows. Once you are finished annotating the image, simply press the your browser’s back button to return to the Editing Screen.
You will now notice that your image indicates the number of annotations that have been added.

Annotating Audio
For annotating an audio object, click on the appropriate record and then navigate to the «View/Annotate» page as illustrated in the previous example.

Your annotation window looks as shown below. Play the audio by clicking on the play button.
Once the recording gets to a point of interest, hit the play button again to pause the recording. In the field provided, type in an appropriate notation. Click on <<Annotate>> to capture the data. **NOTE:** If you are annotating a simultaneous transcription/translation that you wish to follow the audio as exactly as possible, aim to pause the recording just before the chosen text in order to make your annotation. This will result in the annotations highlighting accurately along with your audio.

The annotation is assigned a time or position within the audio. Resume play for further annotations.

Annotations are recorded in the table as shown and positions within the audio are captured as well. You can navigate to any position by clicking on the time. You can also delete an annotation if desired.
Annotating Video
Annotating videos is the same process as audio. The interface allows you to view the video, pause it and annotate sections just like in audio.

Timemap
To use Timemap effectively, two pieces of information should be included in your object records. The first is the date of when the object or file was created, and the second is GPS information. In providing the date, you must use one of two standards for representing data in the “Date Created” field.

1. YYYY-MM-DD – Year-Month-Day: 1974-02-04

The standard for location information is:
- Latitude format: degrees,minutesN/S
- Longitude format: degrees,minutesE/W

These standards are visible in the Project Workspace for ease of compliance. Information on adding GPS to a record is covered in the Digital File Library section of this manual (see page 35).
Go to the main page of the project, and click on ‘Timemap’ in the tabs above your record. Once date and GPS data is entered, the data generates a map as shown below. The top register indicates the time of creation. The bottom register illustrates where the objects were created.

You can zoom in and out of the map to view the location in more detail. You can also click on the drop pin to see the object it represents. By clicking on the name of the object, you are navigated directly to the editing screen for that record.

ADVANCED RESEARCH TOOLS
This section will review the more advanced research tools available within OCCAMS. These include: customising your project (including customising your record types and creating controlled vocabularies), advanced Timemap functions, comparing records, creating new records and creating categories.

Project Settings – customise your project
Project Settings allows you to customise your project. There are six tabs in the Project Settings: Project Details, Project Metadata, Add Users, Controlled Vocabulary Lists, Controlled Vocabulary Relationships and Record Link Lists. The Add Users tab is about permissions.
Permissions in OCCAMS is handled separately in the manual. See page 89 for more information.

**Project Details**
The Project Details tab provides the description of the project. It includes: Project Name, Description, Owner, Contributor(s), Permissions, Locations, Timespan and automated fields for the date created and modified. You can modify this information at any time by navigating to this tab and then hitting «Save».

![Project Settings](image)

**Project Metadata**
In the Project Metadata tab, researchers can customise the Record Types. Record Types, their definitions and fields are discussed in more detail on pages 14 through 23. On the main view of the Project Metadata tab, a list of those Record Types appears along with two options – editing (or customising) and exporting. This section will go over editing Record Types before talking about exporting customised Record Types.

![Record Metadata](image)
**Customising Record Types**

As already discussed, OCCAMS Record Types come with a set of fields, compiled from a variety of disciplines and industry standards. This stock set is a benchmark from which projects can be created. One of the main features in OCCAMS is being able to customise the Record Types to fit the project. Fields can be deleted if they are extraneous, edited for more project-specific wording, moved around so that the order fits the researcher’s own logic and more fields can be added. To customise a Record Type, click on the <<edit>> link corresponding to the desired Record Type.

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Description</th>
<th>Edit metadata</th>
<th>Export settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultural Object (2014 Definition)</td>
<td>An object someone has made that has significance</td>
<td>edit</td>
<td>export</td>
</tr>
<tr>
<td>Natural Object (2014 Definition)</td>
<td>An object that is not made but has significance</td>
<td>edit</td>
<td>export</td>
</tr>
<tr>
<td>Photographic Object (2014 Definition)</td>
<td>Photographs sourced from researchers, collaborators, collectors and/or institutions</td>
<td>edit</td>
<td>export</td>
</tr>
<tr>
<td>Video Object (2014 Definition)</td>
<td>Video sourced from researchers, collaborators, collectors and/or institutions</td>
<td>edit</td>
<td>export</td>
</tr>
</tbody>
</table>

After hitting the <<edit>> button of your chosen Record Type, the list of fields will appear as illustrated below. More fields are visible by scrolling down and the total fields visible are entirely dependent on your browser set up.

Navigate back to the main Project Metadata tab by either clicking on the tab itself or the hyperlink <<Record Types>> as pointed out by the arrow.

There are seven columns of information: Field Name, Description, Source Type, Mapping, Action, Select and Move. The “Field Name” is what appears in the Project Workspace. The “Description” does not appear in the Project Workspace but describes briefly the type of
information the field was designed for. The definitions are short and open for modification if the project demands a more nuanced or detailed definition. “Source Type” dictates the type of data to be entered. If you select “Filled In”, then any amount or type of data can go into the field. The other option is to select “Controlled Vocabulary” for when you want drop down menus to appear. Controlled Vocabularies are discussed on page 70.

The “Mapping” column assigns the field a metadata mapping code for interoperability with other databases. OCCAMS has several standards available to choose from. If you are creating new fields, you will need to assign a mapping code to the field. If you are unfamiliar with metadata mapping, review Error! Reference source not found. on page 102. This provides you with a basic set of elements. If you are not sure about the type of code to use, please contact an OCCAMS administrator for guidance. If you are keen to learn more about metadata mapping, review Appendix C: Further Reading into Metadata Mapping.

The last three columns are actions: Action (or Delete), Select and Move. These actions refer to the fields themselves and will be detailed next.

Deleting Fields
To delete a field, simply hit <<Delete this field>>. A pop up screen confirming the action will appear <<Are you sure you want to delete this field?>>. Hit <<Cancel>> if you have changed your mind or hit <<OK>> to delete the field.

There are fields you should not delete because their absence will cause issues when mapping between the Digital File Library and the Project Workspace. These fields are: Title, Description, Keywords, Creator, Created Date, Place Created, File Copyright, Institution/Holder: File, Institution/Holder: File Identifier, Latitude and Longitude. These fields have been prevented from being deleted. Any other customisation required for record types is available.

Editing Fields
You can edit any part of the field that is necessary. Let’s say that you are working with a Museum that does not use the term “Technique” but prefers the term “Methods” and you want your project to match what the terms of the Museum. Click on the field name you wish to edit

After clicking, the field will open for editing. You can expand the view of a field element – such as the description – by placing your cursor over the arrow as illustrated and dragging down.
You can now edit each element. Simply place your cursor in the appropriate element box and type in the new text.

Afterward entering in the new text, hit <<save>> and then <<close>>. **NOTE:** If you hit <<close>> before save, your changes will not take. Your new text will look like this.

Moving Fields
Let’s say your project has a focus on methods and you want it in a more prominent position. Hovering your cursor over a row will make a blue diamond appear.
Grab this diamond with your cursor and this will allow you to move the entire row wherever you want it, pushing the other fields down in order. The end result is illustrated below.

Creating New Fields
To create a new field, navigate down to the bottom of the page. After the field “OCCAMS Author” will be “Create new metadata field”. Click on this link.

This will activate blank elements for the creation of a new field as illustrated below.

For this exercise, let’s say that the project focuses on bead types. There are several main types as well as subtypes of beads so two additional fields will need to be added. They will be named “Bead Type” and “Bead Sub-Type”. Type in the field name (“Bead Type”) and description (“Type of bead used in work”). Use the default of “Filled In”. For the mapping code, there are several choices. DC:Type is the most appropriate. Hit <<Save>>.
A new field has been successfully created. Repeat the steps for the “Bead Sub-Type” field and then move them to where is most appropriate.

The end result is a Record Type that is customised to the project you are working on. Add as many fields as the project requires.

Exporting Record Types
Once you have customised the Record Types, you may find them useful for another project. Rather than having to add those same fields to a new project, you can export the customised Record Type to a new project. Simply select the fields you want to export (usually, the new ones, customised for your project) by clicking on the box in the Select column. Click <<Export Selected>>. The fields will be exported as a text file. Save the text file with a name you will recognise. Next, select the Record Type you want to add those fields to, browse for the text file and import it. You can then move the new fields to their appropriate positions in the list.

Controlled Vocabulary
All fields in OCCAMS are designed for “natural language vocabularies”. This means that any form of typed data can be entered. However, there may be the occasion where a “controlled vocabulary” is required. Controlled vocabularies are ways in which the data entered can be predefined with only authorised terms or phrases are allowed. According to the Getty’s Introduction to Controlled Vocabularies: Terminology for Art, Architecture and other Cultural Works, the purpose of controlled vocabularies is to “organize information and to provide terminology to catalog [sic] and retrieve information. While capturing the richness of variant terms, controlled vocabularies also promote consistency in preferred terms and the assignment of the same terms to similar content” (2000: 12). In this way, the researcher can maintain quality control over spelling variations and terminologies used in a research project. This step results in the creation of drop down menus that can either be interactive and additive or restrictive and controlled. An example is below:
In this example, there is a selected field that has a predetermined set of answers. In strategising lists for controlled vocabularies, ask yourself the following questions:

1. Do you have complex names or terms specific to the project that are used repeatedly?
2. Do you want to limit the range of options for a field?
3. Do you have terms in foreign languages that are often used?

Once you have thought about the types of vocabularies used in your project, you will next have to identify those fields affected by those terminologies. There are two ways of producing controlled vocabularies: you can upload a set of controlled vocabularies or you can manually input the terms.

Here is an outline reflecting the types of controlled vocabulary needed for a research project on beads. The fields most affected by these terms regard bead types and subtypes (as already created in the previous section “Creating New Fields”).

- Czech Seeds
- Japanese Round
  - Myuki
  - Matsumo
- Toho
  - Treasures
  - Aikos
  - Triangle
  - Takumi
  - Magatama
- Japanese Cylinder
  - Miyuki Delicas
- Charlottes
- Drop
- Bugle
  - Straight
  - Twisted

This outline illustrates what will be a drop down menu in OCCAMS. Once a main bead type is selected, if there are subtypes, those should automatically appear as choices, limiting the drop down list and making it more user friendly. In order to achieve this, there are two steps: first, coding for all the types need to be created and then second, the relationships between those code lists needs to be established. This is actually quite easy as the next steps will show.

Creating Lists
The first task is to code the terms you want to use. The format for coding is as follows:

Name; Description; 1/0: term, term, term, term
The ‘Name’ is the name of the list. Be explicit in naming the list of terms, as this will help you identify the type of controlled vocabulary you are using. I default to the field name I am using within the Record Types. This triggers what list goes with what field. The ‘Description’ is a brief phrase that describes the list. The Name and Description will appear in OCCAMS so it is good to be accurate. The ‘1/0’ is a choice you must make. ‘1’ means that the list is ‘locked’ and only those terms you have included can be used. ‘0’ means that the list is ‘open’ and in addition to the terms you have selected, additional terms can be added to the list in the data entry process. ‘Terms’ are those terms that make up your controlled vocabulary. They are separated by a comma and are automatically ordered alphabetically in OCCAMS so there is no need to stress on how they are ordered in the coding.

Examples of successfully coded lists – using the example of Bead Types and Bead Sub-Types – are as follows:

**List 1**
Bead Types; types of beads used; 1: Czech Seeds, Japanese Round, Japanese Cylinder, Toho, Charlottes, Drop, Bugle

**List 2**
Bead Subtype; subtypes of beads used; 1: Myuki, Matsumo, Treasures, Aikos, Triangle, Takumi, Magatama, Miyuki Delicas, Straight, Twisted

In List 1, I have created the controlled vocabulary for ‘Bead Types’ that include the general types of beads available on the market – this reflects that first tier in my outline. I have also created a Bead Subtype list – tier two in the outline. I used ‘1’ because I want to control new terminology that might be introduced into the project. Note that I am not concerned at this stage about what subtype connects with what main type – that comes later.

The next step is to create a text file for each example. To create a text file, open up a new Word Document, cut and paste the single line of code and save as ‘Plain Text (.txt)’ under the name of the list. You should have documents that look like this:

The next step is to upload these into OCCAMS and then create the kind of relationships needed for the drop down menus.
In the Project Settings, go to the “Controlled Vocabulary Lists” tab. You will get a screen as shown below. Click on <<Browse>>.

Navigate to where the text files have been saved and select one.

Next, click on <<Import Controlled Vocabulary from File>> link. You will get a confirmation that the controlled vocabulary has been imported. Click <<okay>>.
Repeat these steps for the other lists you want to upload. When you are finished, you should have a list of controlled vocabularies such as below. You now have the option to <<view list>>, <<delete list>> or <<export>> the list.

If you find that you need to add more to your list or that there is an error in spelling, click on <<view list>>. You will see the list of terms that will appear in the field “Bead Types”. If you need to add another term, click on <<Add new item>>.

Type in the new term and hit <<save>>.

If you need to edit an existing term, click on the term
The term will open up for editing. Edit the text as you like and then hit <<save>>.

If you have already used “Drop” in your records, they will automatically be updated to the new term “Tear Drop”. To delete a term, click on <<delete>> and this will delete any reference to the term already used and prevent it from being an option in the future. NOTE: If the term has been used or entered in any record metadata, it cannot be deleted. To delete the term, delete the instances of the term from metadata in records first. Simply search for those records using the term and delete the instances.

It is possible that over time, a project will yield a rich controlled vocabulary that would be useful in other projects. For this reason, there is the option of exporting the lists and then uploading them to new projects. Click on the <<Export>> link and a text file document will appear with the complete list of controlled vocabulary. Export each list separately and save as separate text files for uploading as already described.

Additionally, if you have coded the list as <<1>> or “do not allow items to be added in research space”, you can change your mind if later in your project, it becomes necessary. Instead of recoding your lists, you can simply click on the List Name. For example, clicking on <<Bead Subtype>>, opens up the list for editing as illustrated below.

Simply untick the box and you can now add new information in the Project Workspace. This new information will be added to your list and is editable as if it had always been included. When you choose to export the list, all new material will be included as well.
The next step is to assign fields with the appropriate controlled vocabulary. To do this, go to the Project Metadata tab and click on the appropriate Record Type. In this instance, I have chosen “Cultural Object”. Scroll to the field that has been designated for a drop down menu. Edit it so that the “Source” is changed from “Filled In” to “Controlled Vocabulary”.

Additional options will appear to select the list type. Make sure the correct list is selected. This is why naming the list as the field can be very helpful as there is less confusion.

Below the list type is the option to allow multiple selection of terms/items. Click this off or leave as selected (default) depending on the project needs.

Repeat these steps for all fields where controlled vocabularies have been created. The end result should be as below. As you can see, the list type matches the field name and you can clearly check that the correct type has been assigned.

Creating Relationships
Creating controlled vocabulary relationships allows for one type to be selected and only those subtypes associated with that first type (those with relationships) appear in the drop down menu. First step is to navigate to the “Controlled Vocabulary Relationships" tab. Click on “Create a new relationship”.

A new level of actions will appear. Each step will activate the next column.

First, select the Record Type where you have already designated fields as “Controlled Vocabulary”.

The next step is to select the appropriate list type. In this example, “Bead Type”, as the primary list, has been selected.
The next step is to choose the sub-type or secondary list. In this case it is “Bead Sub-Type”.

Now select a primary type. For this example, “Japanese Round” has been selected.

Finally, highlight those secondary terms that are sub-types of “Japanese Round”. Hit "<<save>>".

Once saved, your relationship will look like this:
Repeating the process for another relationship such as below…

…will yield the same list of relationships. Do not let this throw you. Both sets of relationships are there.

Checking the relationships in a record reveals a successful attempt.

Timemap with Spatial Coverage
This feature allows the user to add extra geospatial information to their object record. Here you can add additional GPS locations, draw tracks, polygons or rectangles to accompany the object record.
This is provided in order to fully represent the geographic impact of an object. Perhaps someone from place X is singing in place Y about place Z – and more GPS points are required to encapsulate that. Perhaps a person is speaking a particular language group, and you wish to represent the geographic coverage of people speaking the same language. These are just some of the reasons for which Spatial Coverage can be of use.

To use Spatial Coverage, go to the Spatial Coverage field in the object metadata. Click on the square below the Spatial Coverage field:

A map screen will appear. In this screen you can draw the features you need by clicking on the tools in the top left pane provided:

Once you have drawn everything you need, click on the update button in the top right corner. This will save your information and close the window. This information is then stored with your record.

To see these annotations on Timemap, go to the main project page, and click on the above tab entitled “Timemap with Spatial Coverage”. Then your visualisations and records will appear.

If you wish to just see single GPS points, click on the “Timemap” tab instead.
Compare Records

Compare records allows you to open two records at a time and compare views and metadata. There are many ways to select the two records you want to view. One quick way is to search for records in order to bring up only those records under consideration. In the upper right hand section of your project homepage, type in a keyword or annotation or other marker through which to filter your records.

The search will bring up the desired records. Simply select the two records as indicated and then click on <<Compare records>> link in the Actions panel.

A new tab in your Internet browser will be created, showing the two objects side by side as shown. You can scroll down to compare information in the metadata.
Create New Records
There are several other types of records available in OCCAMS. You can link images to them if you like using the steps described on page 52. Potential records you can create in OCCAMS are: Person, Organisation, Place, Event and Internet Reference. You can also create in the PWS Cultural, Natural, Photographic, Video, Audio and Document records. All individually created records do not require a link to an image and you can add metadata to any of them as well as relate them to other records.

In the Actions panel, click on the “Create a new record” link as demonstrated.

You will be navigated to a screen where you will be able to select – through a drop down menu – the different records available. Click on the one you want to create, such as Organisation, and the page will reload with the appropriate fields.
Fill in the fields with the details of your new record. Afterwards, scroll down to the bottom of the screen and click <<Create new record>>.

New records without linked data appear in the edit screen as below. You can add a photo of the organisation or leave it blank. All new records are created in this same way in the PW, regardless of their type.
**Project Categories**

Project categories are just another way of managing your records. Categories are managed in the far right panel as shown. If you cannot see this panel, simply click on the >> symbol and the panel will appear. Likewise, if you want to hide the categories panel, click on the symbol again.

Categories create folders. To create a new category, simply type in the name of the folder and then hit <<Create>>. Your new category will appear as shown.

You can also make subcategories. Simply right click on the parent category and a list of options will appear. You can rename the category if you need to as well as delete it (only the category, not the records in it). Click on <<Create subcategory>> to add a subcategory. Type in the name and hit return.
You can create a number of categories that will help you filter your records.

MANAGE PROJECT
There are a few additional functions for your consideration when managing your project. This section will go over how you can manage your records once they are in the Project Workspace.

Manage Records
Manage records is the function in the Actions panel where you can batch edit your records. To manage your records, select the link in the Action panel as indicated. **NOTE:** You must have selected records in order to use this function.
**Batch Delete**
Batch Delete is just that – all selected records are deleted from the project. This does not delete the files in the DFL. **NOTE:** this action cannot be undone.

**Batch Categorise**
Batch Categorise allows you to move several records into a category in one action. Move your cursor over the blue cross, click and hold and then drag your cursor over to the desired category. The cross will turn green, letting you know that you can release and finish the action.
**Batch Edit Records**

Batch Edit Records allows you to add the same research metadata to all like records. This means that you can only batch edit one record type – Cultural, Video, Document, etc. – at a time. After selecting a record type to batch edit, scroll down to edit fields. Make sure all the boxes are ticked so that the fields will be updated. Click <<Save>>.