

Desire2Learn 
Learning Environment

Metadata 8.3 and 8.4

User Guide
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eLearning *your way*

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About this guide

This guide contains information about viewing and editing metadata for resources in the Learning Environment.

Audience

This guide is intended for anyone adding metadata to resources before publishing them to a learning object repository.

Important Access to features in the Desire2Learn Learning Environment is dependent on your permissions. Depending on your permissions, you may not have access to all of the features described in this guide.

Organization

The first section of this guide explains the concepts of views and interfaces which are important to fully understand the features available when adding metadata. The second section describes how to add metadata both manually and by applying metadata from another source. The third section describes how to edit a resource's metadata once you have added metadata to the resource. The last section describes the data conflicts that can occur when working with the Metadata tool and how to resolve them.

Related guides

D2L documentation is available in the Documentation Library on the D2L Community website: <http://community.desire2learn.com/>. (A username and password are required to access this site. Please contact your Account Manager if you require access.)

Introduction

Overview

Metadata is information about a learning resource that you add to the resource to help other users locate it and understand its purpose.


You can add metadata to content modules and topics and course files before publishing them to a learning object repository (LOR).

From within an LOR, you can search for learning resources (objects and assets) based on their metadata, and you can view an object's metadata to determine whether it suits your needs before you import it into a course.


Accessing the Edit Metadata page

You can access metadata through the Content tool or at the point where you publish an object or asset to an LOR. You can also view resources' metadata inside an LOR, but you cannot edit it. To edit metadata for a resource in an LOR, you must import the resource into a course, edit its metadata, and republish it. See the *LOR User and Reference* guide for more information.

► **To edit metadata through the Content tool**

- 1 Click the **Content** link in your course navigation bar.
- 2 Click the  **Edit Metadata** icon for the course or for a module or topic.

View-only permission

If you have permission to view metadata but cannot edit it, you can view a resource's metadata through the Content tool by following the same procedure used to edit metadata except that the icon used to access metadata is labeled  **View Metadata**.

Views and interfaces

Views

A view determines the structure of the form you use to enter metadata, including the fields available, how they are organized, restrictions on the data you can enter, etc. Views are sometimes also called profiles.

Your organization may want you to use specific views for different types of resources; talk to site administration to get information about the views available to you and their appropriate use.

► **To change your view**

On the Edit Metadata page, select the view you want to use from the **Select a view** drop-down list at the top of the page.

Notes

- Unsaved changes are lost when you switch views.
- Switching views can lead to conflicts. See *Troubleshooting conflicts*, p. 15, for information about resolving conflicts.

Basic and Advanced interfaces

There are two interfaces—Basic and Advanced—that you can use to enter metadata. The basic interface is simpler and easier to work with, but may not include all of the fields available in the advanced interface (depending on the view) and only allows you to enter terms in the default language.

In the advanced interface you can specify the language and enter terms in multiple languages, and you can enter multiple values for some fields (e.g. multiple keywords).

► **To change your interface**

On the Edit Metadata page, select the interface you want to use from the **Edit Mode** drop-down list at the top of the **Edit Metadata Record** section.

Note Some views may not be available in the advanced interface.

Setting your interface preference

1. From My Home, in the **Welcome Widget**, click **Preferences**.

2. Click the **Metadata** tab.
3. Set your preference options.
4. Click **Save**.

Metadata preferences

Option	Description
Default Interface	Whether you want to view the Advanced or Basic interface by default when you edit metadata.
Initial Category Display	Whether in the Basic interface you want to see all of the fields in every category (Expanded) or only the category names (Collapsed) by default. If you choose Collapsed , you can elect to show the fields in the first category by default.

Adding metadata to a resource


Entering metadata manually


The easiest way to add metadata to a resource is to type it in manually.

Note If you want to use a template, import metadata, or copy metadata from another resource, do so before manually entering data as any data you enter is erased when you apply existing metadata from another source. See *Applying existing metadata*, p. 11, for more information.

► To enter metadata

- 1 On the Edit Metadata page for the resource, enter metadata using the fields in the **Value** column.

If the **Value** column does not contain a data entry field, click the  **Edit** icon beside the field name to edit the item.

If the item does not have an  **Edit** icon or a data entry field, you cannot edit the item.

Note You can use HTML tags in the Description and Keyword fields. This displays as formatted text in search results.

- 2 Click **Save**.

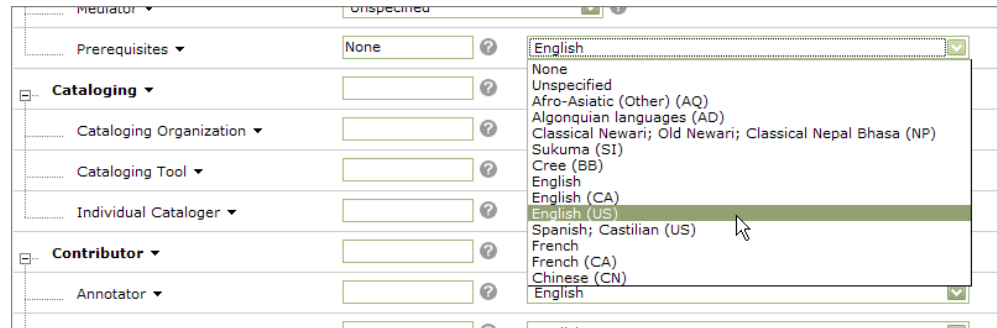
Entering data in multiple languages

If you are using the advanced interface (p. 7), you can specify the language of your metadata and you can enter data for a single field in multiple languages. In the basic interface, you cannot specify metadata language.

For example, you could enter a description in English, Spanish, and French. Alternatively, a resource might already have English metadata that you want to translate into Spanish. In this case you would add a Spanish value for each field and then translate each field's information.

► To specify a field's language (advanced interface only)

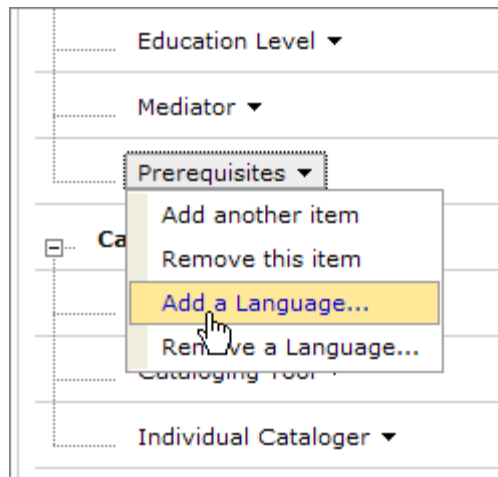
On the Edit Metadata page, select the appropriate language from the drop-down list in the **Language** column for the corresponding field.



Selecting the language used for the value in the Prerequisites field

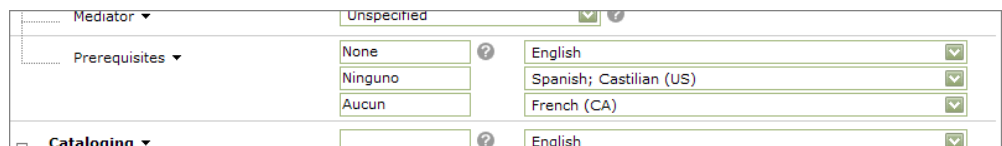
► **To add additional languages to a field (advanced interface only)**

- 1 Click the field name and then click **Add a Language**.



Adding a language to the Prerequisites field

- 2 Select the languages to add.
- 3 Click **Add Selected**.



A field with three language variants

Tip You can add a language to all fields by clicking the **Language** heading and then clicking **Add Language to all**.

Adding multiple values

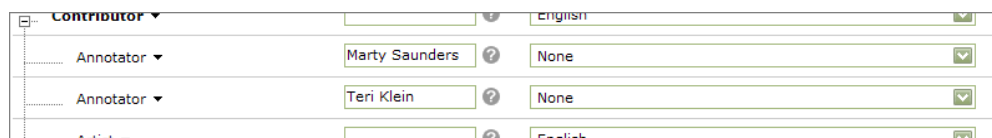
In some fields you will need to enter more than one value; for example, a resource will normally have multiple keywords and may also have multiple authors or contributors.

In the basic interface (p. 7), if a field accepts multiple values it is listed multiple times.

In the advanced interface, you manually add values to a field and then enter data for the additional values. Each value can have multiple translations in different languages.

► To add a value to a field (advanced interface only)

Click the name of the field and then click **Add another item**.

A screenshot of a metadata editing interface. At the top, there is a dropdown menu labeled 'Contributor' with a small icon to its left. Below this, there are two rows of input fields. The first row has a dropdown menu labeled 'Annotator', a text input field containing 'Marty Saunders', a question mark icon, and a dropdown menu with 'None' selected. The second row has a dropdown menu labeled 'Annotator', a text input field containing 'Teri Klein', a question mark icon, and a dropdown menu with 'None' selected. Below these, there is a third row with a dropdown menu labeled 'Artist', a text input field containing 'English', a question mark icon, and a dropdown menu with 'English' selected.

The Annotator field with two values

Applying existing metadata

Applying a template

Templates allow you to quickly apply standard metadata to resources that have duplicate information, saving you from re-entering the same information for each resource.

Templates are associated with specific views (p. 7), so you may not have access to a template depending on the view you are using. Talk to site administration to learn more about the templates available to you.

Note Applying a template clears all existing metadata, including metadata not visible in the current view.

► To import metadata from a template

On the Edit Metadata page, select a template from the **Apply a template** drop-down list at the top of the **Edit Metadata Record** section.

Importing metadata from a file

You can import metadata from an XML file, including a file created by exporting metadata from another resource.

Note Importing metadata clears all existing metadata, including metadata not visible in the current view.

► To import metadata

1 On the Edit Metadata page, click  **Import Metadata**.


- 2 Click **Import XML File**.
- 3 Select whether the file is in your course files or on your computer and click **Find** or **Browse** to locate the file.
- 4 Click **Import**.

Copying metadata from another Content resource

If another resource in your course content has similar metadata, you can copy that resource's metadata and then modify it, rather than re-entering the information from scratch.

Note Copying metadata clears all existing metadata, including metadata not visible in the current view.

► To copy metadata

- 1 On the Edit Metadata page, click  **Import Metadata**.
- 2 Click **Copy Metadata from Course, Module or Topic**.
- 3 Click the name of the resource you want to copy metadata from.

Importing a vCard

A vCard is a virtual business card. The vCard has become a standard format for storing information about individuals or corporations and can contain a person's name, organization, and miscellaneous identifying information. Some fields in some views accept vCard data.

Note Importing vCard data into a field clears any existing data in the field.

► To import a vCard

- 1 On the Edit Metadata page, click the name of a vCard field and then click **Import vCard**.
- 2 Select whether the file is in your course files or on your computer and click **Find** or **Browse** to locate the file.
- 3 Click **Import**.

Editing existing metadata

Removing translations from a field

If you have translated a field into multiple languages, you can delete a translated value by removing the associated language.

- 1 On the Edit Metadata page, click the field name and then click **Remove a Language**.
- 2 Select the languages you want to remove.
- 3 Click **Remove Selected**.

Tip You can remove a language from all fields by clicking the **Language** heading and then clicking **Remove Language from all**.

Removing values from a field

On the Edit Metadata page, click the name of the field and then click **Remove this item**.


Clearing a resource's metadata

Clicking **Clear Metadata** clears all metadata for the current view and any metadata entered through other views that have the same base view. For example, if a resource has metadata based on IEEE LOM as well as metadata based on Dublin Core, and you clear metadata through a view based on Dublin Core, the IEEE LOM-based metadata remains.

► **To clear metadata**

On the Edit Metadata page, click the **Clear Metadata** button at the top or bottom of the page.

Exporting a resource's metadata

- 1 On the Edit Metadata page, click  **Export Metadata**.
- 2 Enter a name for the export file.
- 3 Select the base view you want to export metadata from.
- 4 Click **Export**.

Troubleshooting conflicts

Conflicts occur when a resource's metadata violates restrictions set by the current view. You may encounter a conflict when you do any of the following:

- switch between views
- switch from the advanced interface to the basic interface
- apply a template
- import metadata

Conflict types and resolutions

Conflict	Reason	Result	Resolution
Character Limit	The value of the data exceeds the character limit set for the field	The value is truncated	Use a shorter value or cancel your changes and use the advanced interface or an alternate view
Vocabulary	The value of the data does not belong to the restricted vocabulary set for the field	The value is cleared	Select a value from the field's restricted vocabulary or cancel your changes and use the advanced interface or an alternate view
Multiplicity	A field contains more values than the view allows	Additional values are saved but are not displayed	Use the advanced interface or an alternate view if you want to see or edit the additional values
Language	Occurs when you import data in a language not used by the Metadata tool in your organization	The language is changed to "unspecified"	Select an alternate language, leave the language unspecified, or ask site administration to add the language

Appendix A: Addendum for LE 8.4

Overview

From within an LOR, you can search for learning resources (objects and assets) based on their metadata, and you can view an object's metadata to determine whether it suits your needs before you import it into a course. Depending on your permission, you can also edit the learning object's metadata.

Editing existing metadata

You can now edit metadata from the LOR Search Results page in addition to the Publish to LOR page as long as you have sufficient permission.

Adding metadata classifications

With sufficient permission you can classify a course, module or topic's taxon path in the Content tool.

► **To add classifications to a course/module/topic**

- 1 For a learning object, click the **Edit Metadata** icon.
- 2 On the Edit Metadata record page, under the **Classification** category, click the **Edit** icon next to the **Taxon Path** field.
- 3 Select a schema from the **Classification Schema** drop-down menu.
- 4 Click the **Add** icon beside the taxon you want to add. For a custom schema you must click one of the links listed before you can click a taxon to add.

Appendix B: Revision history

Edition	Notes
Second (August 22, 2008)	Added note that users can use HTML in the Description and Keyword fields when adding metadata to a topic, module or course.
Third (March 30, 2009)	Added Addendum for material for 8.4.

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