

OHMS (Oral History Metadata Synchronizer) Getting Started Guide

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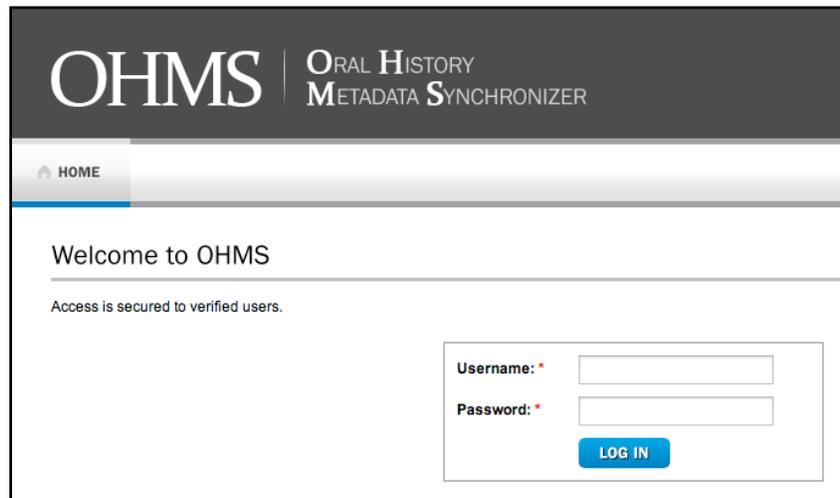
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2.0 OHMS APPLICATION: OVERVIEW

The OHMS application is a user-authenticated web application so individual users must have their own account with a username and password. Once you have an account and have been given a user name and password, log into OHMS. When you first log in you will be asked to change your password and accept a terms of service agreement.



The screenshot shows the OHMS application interface. At the top, the logo 'OHMS' is displayed next to the text 'ORAL HISTORY METADATA SYNCHRONIZER'. Below the logo is a navigation bar with a 'HOME' link. The main content area features a 'Welcome to OHMS' message and a note: 'Access is secured to verified users.' A login form is positioned on the right side, containing two input fields labeled 'Username:' and 'Password:', each with a red asterisk indicating a required field. A blue 'LOG IN' button is located below the password field.

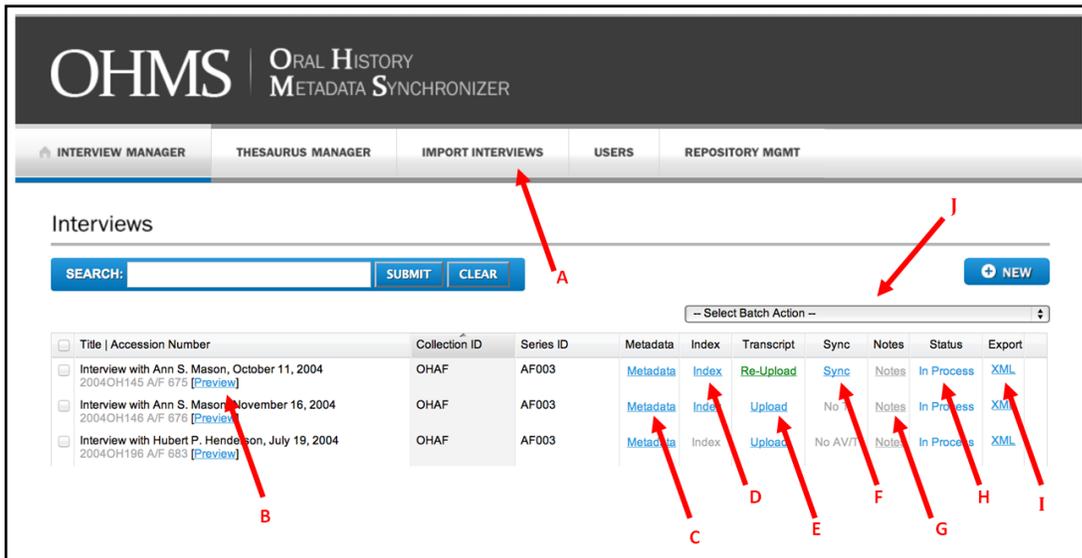
Once logged into the OHMS application, you can begin to prepare your oral history interview for access. There are several major components of the OHMS application:

- **Interview Manager:** Central area to initiate an interview. Provides navigation to major functional areas of OHMS and monitoring of workflow.
- **Metadata Manager:** Input or edit collection or interview level metadata.
- **Indexing Module:** Index/annotate an interview.
- **Transcript Synchronization Module:** Place timecode into a transcript at appropriate locations.
- **Thesaurus Manager:** Manage controlled vocabularies used while indexing.
- **Interview Import:** Import interview metadata to begin indexing and/or transcript synchronization.
- **User Management:** Assign user rights and permissions.

3.0 INTERVIEW MANAGER

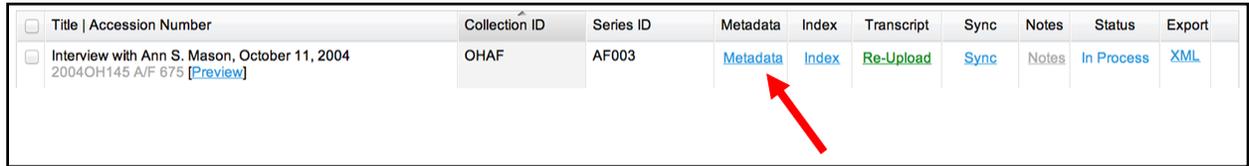
The Interview Manager is the main hub of the OHMS application. The Interview Manager is where you:

- A. Create new interview records
- B. Preview completed interviews
- C. Update or edit interview-level metadata
- D. Initiate the indexing module
- E. Upload transcripts
- F. Initiate transcript synchronization
- G. Flag an interview with a note
- H. Workflow management
- I. Export the final XML or CSV file for an interview
- J. Batch export or delete interviews



4.0 METADATA EDITOR

Interview-level metadata can either be created in OHMS or imported and, therefore, retain metadata associated with the interview throughout the OHMS process. OHMS utilizes metadata fields commonly associated with oral history.



Title Accession Number	Collection ID	Series ID	Metadata	Index	Transcript	Sync	Notes	Status	Export
Interview with Ann S. Mason, October 11, 2004 2004OH145 A/F 675 [Preview]	OHAF	AF003	Metadata	Index	Re-Upload	Sync	Notes	In Process	XML

The “Metadata” link for an interview is a navigational link to the interview-level metadata editor for that particular interview. This is where the most critical information for initiating activity in OHMS takes place.

In order to begin work in the OHMS application, three metadata fields must be completed:

- Title
- Media format
- Media Connection (depending on your connection type)
 - Media URL
 - Media Host ID Information
 - iFrame Embed code

Once these three elements are established in OHMS, an interview can be indexed, or a transcript can be synchronized as soon as the text is uploaded. Not all of the fields visible in the interview-level metadata records will be visible in the OHMS Viewer (such as interview-level subjects and keywords). However, all of the interview-level fields remain associated with the interview in the XML document accessed by the OHMS Viewer. These can be indexed, made searchable, or harvested by a digital library, archive, repository, or CMS.

The Nunn Center has worked with our university's digital library to develop efficient workflows that utilize the resulting OHMS XML document to ingest interviews into the digital library's CMS, but also to serve as the source for the deposit of an interview into the preservation repository. As a result, the OHMS XML document contains both interview and intra-interview level metadata to maximize future flexibility.

4.1 METADATA FIELDS (INTERVIEW LEVEL)

The following is a list of interview-level metadata fields that are utilized by the OHMS application. Many of these elements are utilized by the OHMS Viewer, however, many elements in this set are not utilized by the OHMS Viewer but are included:

- **Title**
- **Accession Number**
- **Interviewee** (First Last)
- **Interviewer** (First Last)
- **Interview Date** (YYYY-MM-DD)
- **Date (Non-preferred format)** - This is utilized for partial dates (Instead of the previous field)
- **Collection ID**
- **Collection Title**
- **Collection Link** (hyperlink)
- **Series ID**
- **Series Title**
- **Series Link** (hyperlink)
- **Summary**
- **Keywords**
- **Subjects**
- **Duration**
- **Media Format** (Audio or Video)
- **Media File Host** (Choices vary by selection. See section 4.3 for more information.)
 - **Host** (directly linking to audio or video file)
 - Media URL (must be direct link to the audio or video file. For audio, .mp3 or .mp4 files are recommended, for video files, you will require HTML 5 delivery, requiring an H.264 encoded file in a .M4V container.)
 - **YouTube**
 - Media URL
 - **Kaltura**
 - Requires iFrame embed code
 - **SoundCloud**
 - Requires iFrame embed code
 - **Brightcove:** Requires the following
 - Media Host Account ID
 - Media Host Player ID
 - Media Host Clip ID
- **Media Filename**

- **Alt Sync URL** – [Legacy] This field was utilized when OHMS was not able to synchronize transcripts with video. OHMS now is able to synchronize transcripts with video and, therefore, this field is no longer necessary for current OHMS functionality, however, it is being retained for backward compatibility.
- **Usage Statement**
- **Rights Statement**
- **Funding**
- **Format**
- **Language**
- **Type**
- **Thesaurus** - Choose thesauri for accessing controlled vocabularies in the indexing module. Pertains to the “Keywords,” “Subjects,” and “Titles” fields. Thesaurus must be uploaded in Thesaurus Manager or utilize “Library of Congress Subject Headings—Linked” (for the “Subjects” field).
- **Transcript Sync Data** - Metadata created in OHMS after an interview transcript has been synchronized.
- **Repository** - Automatically generated
- **CMS Record ID** - Automatically generated
- **OHMS XML Filename**
- **Use Restriction**

4.2 DIGITAL MEDIA HOST

OHMS is not a media repository, so you do not upload the audio or video interview into OHMS. You must tell OHMS where your digital media is hosted, either by a direct hyperlink or by adding pertinent streaming server information. The media host section of the metadata editor contains multiple fields, which allows OHMS to effectively interface with the digital object via progressive download or a streaming server.

- First, you must tell OHMS whether you will be working with **Audio** or **Video**.
- Second, you must tell OHMS the **location** of the Audio or Video files.
- If you are using direct linking (progressive download or HTML 5 delivery) with a direct link to the media file via URL, you will need to select “Host” when setting up your interview.
- In most cases, direct linking to the media file will only require populating the “media URL field.” This URL must end with the audio or video file extension. The Nunn Center has been using progressive download for digital audio using mono, low bitrate encoded .mp3 and .mp4 audio files with consistent success. This must be a direct link to the audio or video file and cannot be a “masked” link as commonly found with files stored on cloud based entities such as DropBox.
- If you are using a streaming service, the OHMS Application and the OHMS Viewer must be programmed to integrate with that service. Currently, OHMS has been developed to work with the following streaming services:
 - YouTube
 - Kaltura
 - Brightcove
 - SoundCloud
- If you are working with digital video, you can either:
 - upload your video files to Youtube
 - upload your audio files to SoundCloud
 - use Brightcove
 - use Kaltura (Cloud or Local)
 - utilize HTML 5 delivery (see below for optimal settings)
- If you are working with the commercial vendor **Brightcove**, you will need to place the host account, player, and item ID numbers into the appropriate fields and choose Brightcove as your media host in order to access the media file.
- If you are working with **YouTube** you will need to make your video “public” in the YouTube settings. Simply insert the link generated (or the identifier associated with the “share” link) into the media URL field.

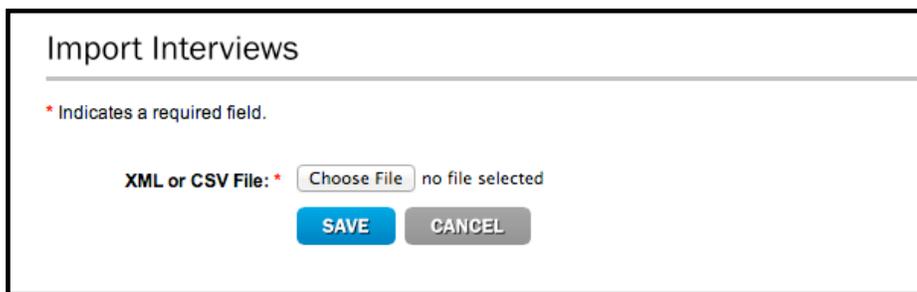
- If you are using **Kaltura**, you must paste the iFrame embed code into the “**Kaltura/SoundCloud iFrame Embed Code**” field.
- If you are using **SoundCloud**, you must paste the iFrame embed code into the “**Kaltura/SoundCloud iFrame Embed Code**” field.
- If you are using **HTML5 delivery for video**, it is recommended that you encode your video assets using h.264 and utilize the .M4V container. This will prove most effective integrating with the OHMS default player in an HTML 5 environment. Of course, the HTML5 user experience will require the use of an HTML 5 compatible browser. We recommend some testing of versions created from your video editing/encoding platform prior to use as some video editing/encoding platforms seem to work better than others.
- If you are working with streaming services other than the ones listed, the OHMS viewer is customizable but will require some programming of both the application and the viewer.

4.3 IMPORTING METADATA

You can batch import interview metadata in order to initiate the creation of a transcript sync data or an interview index, or to re-import an OHMS XML file to update or edit the record.

Initial Import of Metadata:

Initial import of metadata can be in the form of both CSV and XML files. The CSV import feature is designed only for initial import and requires the authorized [OHMS CSV Template](#). If you would rather import your records in the form of XML, your XML must be constructed to emulate an OHMS XML file. Batch XML files can be uploaded together if they are zipped up in a single directory.



Once more, the CSV import feature is designed for initial (batch) setup of metadata records for OHMS processing. If you are on a Mac and using Microsoft Excel, it is recommended that you format the .csv file as a *Windows formatted .csv* if your application provides that option.

Current importable (CSV) fields include:

- Title (required)
- Accession #
- Interviewee (multiple values separated by a semicolon “;”)
- Interviewer (multiple values separated by a semicolon “;”)
- Date (interview date—*must be structured as YYYY-MM-DD or MM/DD/YYYY*)
- Collection ID
- Collection Title
- Series ID
- Series Title
- Summary
- Subjects (multiple values separated by a semicolon “;”)
- Duration
- Media URL
- Video ID
- Usage
- Rights
- Funding
- Format
- Language
- Type
- Transcript Sync Data
- CMS Record ID
- Date Non Preferred Format
- XML Filename
- Alt Sync URL
- Use Restrictions
- Keywords (multiple values separated by a semicolon “;”)
- It is important that your Date field retains the structure YYYY-MM-DD or MM/DD/YYYY or else the import will fail.
-

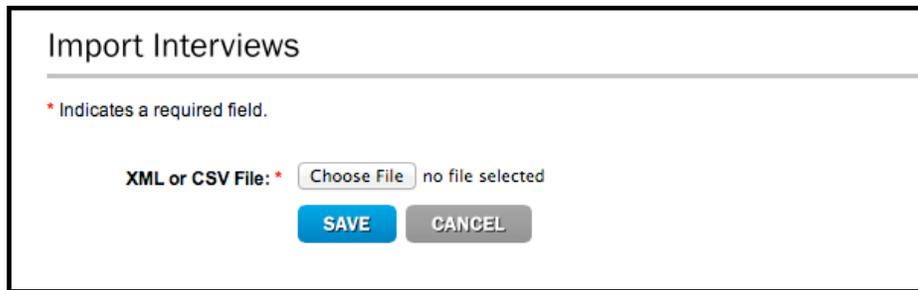
Note: The .csv file that you can export from OHMS is not designed to be importable. Do not use a .csv exported from OHMS as a template for importing metadata, it will not import correctly. See section [11.1](#) of this guide for more detail on the .csv export feature.

4.4 IMPORTING AN OHMS XML FILE

There will be circumstances where you will want or need to *reimport* an existing OHMS XML file. For example:

- Fix typos or mistakes
- Make additions or changes to the metadata
- Add an index or a transcript

Simply choose “Import” and upload an xml file.



Import Interviews

* Indicates a required field.

XML or CSV File: * Choose File no file selected

SAVE CANCEL

Batch XML files can be uploaded together if they are zipped up in a single directory.

4.5 METADATA EDITOR: IMPORTANT NOTES

- **Required fields:** Title, media format, and applicable media delivery information, depending on your delivery platform (Media Host, Media URL, Media Host Account, Player and Item ID numbers, or the iFrame embed codes).
- **Media host:** This section determines the delivery source of the media file. If you are using YouTube or a streaming media host such as Kaltura, Brightcove, or SoundCloud, selecting this option provides the information necessary for OHMS to work with these streaming services. If using Brightcove or Kaltura, see the specifics above in section 4.3 for requirements.
- **Media URL:** This is the web location for the digital audio or video. If you are *not* using a streaming service that requires additional information, the Media URL must be populated with a direct link to the media file in order to function in OHMS.
- **Transcript sync data:** Data for this field is automatically created by OHMS after syncing the transcript and is therefore remains empty during setup or metadata creation.
- **Thesaurus (keywords, subjects, titles):** Assignment of a thesaurus for titles, subjects or keywords that will be autosuggested while indexing a particular interview. Repository administrators and editors can upload a thesaurus in these categories. (See section 6.0 of this guide for more information.)

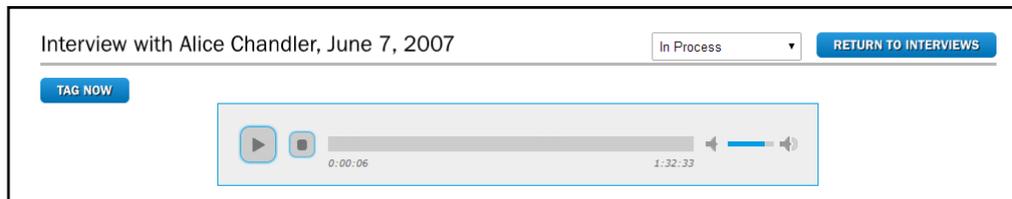
- **Use Restriction:** This field does not impact the OHMS Viewer but has been added as a field. Use of this field can serve to potentially flag restricted content prior to putting an OHMS XML file/interview online. This field is both importable and exportable in the OHMS XML and CSV files.
- **OHMS XML Filename:** The input in this field determines the filename of the exported xml file. This will make it easier to determine each interview's OHMS Viewer hyperlink. This field is exportable and importable via the OHMS XML.
- **Keywords:** This field functions much like the Subjects field to transport interview level metadata. This field is both importable and exportable in the OHMS XML and CSV files and does not impact the OHMS Viewer.
- **Acceptable Date Formats:** OHMS has been updated to accept a wider variety of date formats. It now accepts dates in the form of mm/dd/yyyy which is the default date format in Microsoft Excel. Now the dates in your OHMS csv should be autocorrected in Excel and import properly.
- **Collection/Series Links:** These fields are used to provide hyperlinks to an interview's collection or series record within your repository's online catalog. This allows users to return to a finding aid or to an online catalog record from the OHMS Viewer.
- **Kaltura / SoundCloud Embed Codes:** In order for OHMS to work with Kaltura and SoundCloud, you will need to generate iFrame Embed codes.

5.0 INDEXING MODULE

The indexing module is deployed by clicking an interview's "Index" button in the interview manager.

<input type="checkbox"/>	Title Accession Number	Collection ID	Series ID	Metadata	Index	Transcript	Sync	Notes	Status	Export
<input type="checkbox"/>	Interview with Ann S. Mason, October 11, 2004 2004OH145 A/F 675 [Preview]	OHAF	AF003	Metadata	Index	Re-Upload	Sync	Notes	In Process	XML

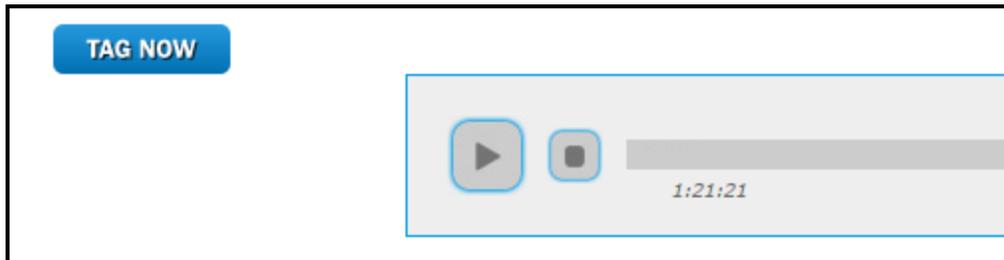
Activating an interview's indexing module for the first time will bring up a view similar to this one:



5.1: INDEXING CONTROLS AND WORKFLOW

Once you are in the Indexing Module, in order to begin indexing an oral history interview, you must press the "Play" button on the player (JPlayer, YouTube, Brightcove, Soundcloud, or Kaltura).

The player must be playing in order for you to create an index point. This is created by pressing the "Tag Now" button at the appropriate moment.



When you press "Tag Now" you are presented with the tag data module. This includes player controls and a series of descriptive fields to fill out.

Tag Data

* Indicates a required field.

Interview:

Timestamp:

English

Segment Title: *

Current Thesaurus: None

Partial Transcript:

Keywords:

Keywords should be separated by a semi-colon.
Current Thesaurus: None

Subjects:

Subjects should be separated by a semi-colon.
Current Thesaurus: None

Segment Synopsis:

GPS:

Coordinates are entered in the format "XX.XXX, YY.YYY" where X is latitude (north or south) and Y is longitude (east or west).

The indexer can control the player within the tagging module. The nature of indexing means that the indexer will, inevitably, tag a segment late. In other words, you don't know if something is important until after you have heard it. For this reason the player backtracks a few seconds each time the tagging module is activated.



5.2 INDEX MODULE METADATA FIELDS

An OHMS Index segment contains the following metadata fields:

- Time Stamp
- Segment Title (required)
- Partial Transcript
- Keywords (semi-colon delimited)
- Subjects (semi-colon delimited)
- Segment Synopsis
- GPS Coordinates
- GPS Zoom
- GPS Description
- Hyperlink
- Link Description

Indexing is a very subjective process and can vary greatly in breadth and depth. The Nunn Center has worked out several different levels of indexing, which correspond to the level of detail of our desired outcome. For specific guidance on how the Nunn Center uses each field, consult the Nunn Center's guide, *Indexing Interviews in OHMS: An Overview*.

Although we have identified a function for each index field, specific policies regarding the particular use of these fields should be discussed by individual institutions.

Time Stamp

This is created as soon as you press the “Tag Now” button. However, you will need to adjust your time stamp so that the segment correlates to the appropriate time.

Segment Title

Segment titles are required. It is best to use descriptive titles, because these act as chapter titles for the interview.

Partial Transcript

The Nunn Center has found that including a brief partial transcript helps corroborate locations for the user. We tend to use the first spoken words of a segment (140 characters or so).

Keywords

This field also allows for multiple entries, separated by a semi-colon, and can be used in conjunction with a thesaurus to control or suggest terms. (See section 6.0 of this guide for more information.) The Nunn Center uses this field for local terms and tags, as well as for project specific vocabularies. This field can interface with a thesaurus as specified in the metadata module.

Subjects

This field allows for multiple entries, separated by a semi-colon, and can be used in conjunction with a thesaurus to control or suggest terms. (See section [6.0](#) of this guide for more information.) The Nunn Center uses this field for Library of Congress Subject Headings, or another controlled vocabulary.

Segment Synopsis

The segment synopsis is designed to contain a descriptive statement about a segment.

GPS Coordinates

When clicked, this field connects a user to a location on Google Maps. Of course, the institution can change the map resource if desired. Coordinates are entered in the format "XX.XXX, YY.YYY", where X is latitude (north or south) and Y is longitude (east or west). Only one set of coordinates is allowed per segment at this time. There must be a space following the comma.

GPS Zoom

This dropdown field allows the indexer the ability to determine a custom zoom level as it interfaces with the OHMS Viewer on the user side. Choices include a scale ranging from 1 (world view) to 21 (street view). The default view is set at 17.

GPS Description

This field identifies the location corresponding to the GPS coordinates.

Hyperlink

This field allows a hyperlink to be present, connecting the oral history segment to an external resource of any type. Only one hyperlink is allowed per segment at this time.

Link Description

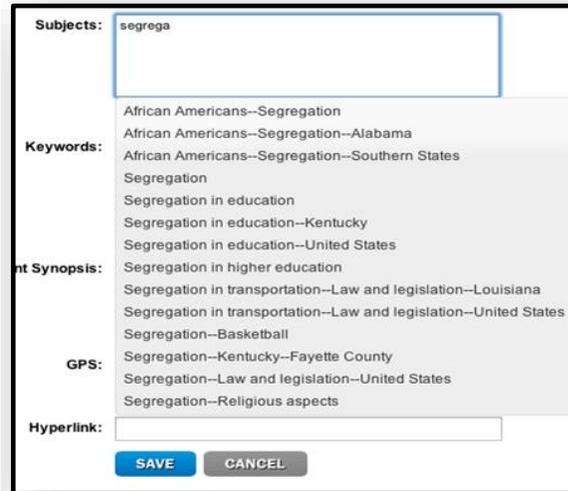
This identifies or describes the hyperlink.

5.3 USING A THESAURUS IN THE INDEX MODULE

The segment **title**, **subjects** and **keywords** fields in the Index Module can utilize an assigned thesaurus to facilitate use of controlled vocabularies. A custom thesaurus can be uploaded for each of the three fields.

Each of these fields can be assigned a different thesaurus for a particular interview. If a thesaurus has been uploaded and assigned in the metadata manager, terms will be suggested based on a partial keying of letters. For example, if the indexer begins typing “segrega” in the subjects field, all of the terms in the assigned thesaurus containing “segrega” will be suggested. The indexer selects the term desired and the term is dropped into the subjects field.

This feature requires a thesaurus to be uploaded first, and then assigned to the interview. (See section 6.0 of this guide for more information).



The screenshot shows a web interface for the Index Module. At the top, there is a 'Subjects:' label followed by a text input field containing the text 'segrega'. Below this, a dropdown menu is open, displaying a list of suggested terms. The terms are organized into sections: 'Keywords:', 'nt Synopsis:', and 'GPS:'. The 'Keywords:' section includes 'African Americans--Segregation', 'African Americans--Segregation--Alabama', and 'African Americans--Segregation--Southern States'. The 'nt Synopsis:' section includes 'Segregation', 'Segregation in education', 'Segregation in education--Kentucky', 'Segregation in education--United States', and 'Segregation in higher education'. The 'GPS:' section includes 'Segregation in transportation--Law and legislation--Louisiana', 'Segregation in transportation--Law and legislation--United States', 'Segregation--Basketball', 'Segregation--Kentucky--Fayette County', 'Segregation--Law and legislation--United States', and 'Segregation--Religious aspects'. At the bottom of the dropdown, there is a 'Hyperlink:' label followed by an empty text input field. Below the dropdown, there are two buttons: 'SAVE' and 'CANCEL'.

5.4 THESAURUS ASSIGNMENTS

During the metadata setup process for a record, you can assign an uploaded or linked thesaurus to a particular field (Keywords, Subjects, Titles). Once you save that record, the corresponding fields in the Indexing Module for that interview will be assigned appropriately and the thesaurus will function as described in section 5.3.

Beginning with the OHMS Application **version 2.2.17**, the “Subject” thesaurus can utilize a “Linked” version of the Library of Congress Subject Headings.



The screenshot shows a web interface for Thesaurus Assignments. It features three dropdown menus, each with a label and a selection box. The first dropdown is labeled 'Thesaurus (Keywords):' and has 'SPOKE' selected. The second dropdown is labeled 'Thesaurus (Subjects):' and has 'LCSH-SpokeDB' selected. The third dropdown is labeled 'Thesaurus (Titles):' and has 'Standard Titles' selected. Each dropdown menu has a small downward-pointing arrow on the right side.

5.5 NOTES ABOUT INDEXING INTERVIEWS

Indexing is an incredibly subjective process and can be as comprehensive as you choose. For models on indexing and the Nunn Center's approach, we recommend consulting the Nunn Center's guide, [Indexing Interviews in OHMS: An Overview](#), as well as the companion video tutorial.

6.0 THESAURUS MANAGER

In order to utilize a thesaurus and the controlled vocabulary functionality while index in OHMS, you must upload thesauri for the indexing module. These thesauri contain the terms that will be autosuggested in the indexing fields. This helps to manage consistency in titles and descriptive terms. Thesauri can be uploaded for the following fields in the interview index:

- Title
- Subjects
- Keywords

The screenshot shows the OHMS (Oral History Metadata Synchronizer) interface. The navigation menu includes 'INTERVIEW MANAGER', 'THESAURUS MANAGER', 'IMPORT INTERVIEWS', 'USERS', and 'REPOSITORY MGMT'. The 'THESAURUS MANAGER' tab is active. Below the menu is a search bar with 'SEARCH', 'SUBMIT', and 'CLEAR' buttons, and a 'NEW' button. A table of interviews is displayed with columns for Title, Accession Number, Collection ID, Series ID, Metadata, Index, Transcript, Sync, Notes, Status, and Export. A red arrow points from the 'THESAURUS MANAGER' menu item to the table. A red text box on the right says 'Upload and manage controlled vocabularies'.

Title Accession Number	Collection ID	Series ID	Metadata	Index	Transcript	Sync	Notes	Status	Export
Interview with Ann S. Mason, October 11, 2004 2004OH145 AF 676 [Preview]	OHAF	AF003	Metadata	Index	Re-Upload	Sync	Notes	In Process	XML
Interview with Ann S. Mason, November 16, 2004 2004OH146 AF 676 [Preview]	OHAF	AF003	Metadata	Index	Upload	No T	Notes	In Process	XML
Interview with Hubert P. Henderson, July 19, 2004 2004OH198 AF 683 [Preview]	OHAF	AF003	Metadata	Index	Upload	No AVIT	Notes	In Process	XML

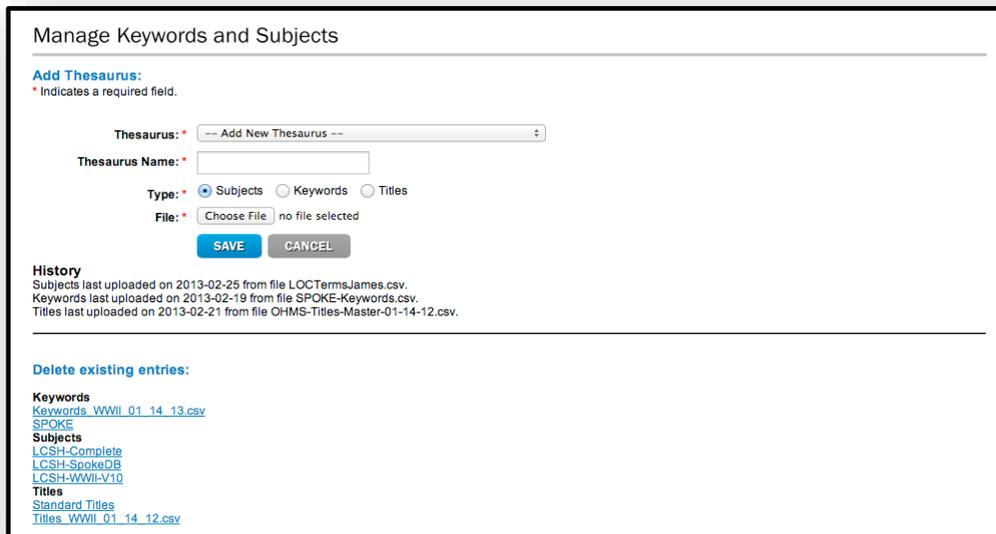
Thesauri must be uploaded as a single-column .CSV file. See section [6.1](#) of this guide for specifics regarding formatting your .csv file.

Beginning with the OHMS Application **version 2.2.17**, the “Subject” thesaurus can utilize a “Linked” version of the Library of Congress Subject Headings. Headings have been harvested via the Library of Congress Linked Data service and become an optional thesaurus for the “Subjects” fields in the Indexing Module. You do not need to upload anything to utilize this functionality. You just need to assign the “Library of Congress Subject Headings (Linked)” in the “Thesaurus (Subjects)” field of that particular record in the Metadata Module.

6.1 UPLOADING A THESAURUS

When uploading a thesaurus:

- Your .csv file must be a single column.
- If you are on a Mac and using Microsoft Excel, format the .csv as a Windows formatted .csv.
- Give your thesaurus a descriptive title and a version number so that you can upload a replacement file with more terms if needed.



The screenshot shows a web interface titled "Manage Keywords and Subjects". Under the heading "Add Thesaurus:", there is a note: "* Indicates a required field." The form includes a "Thesaurus:" dropdown menu with "-- Add New Thesaurus --" selected. Below it is a "Thesaurus Name:" text input field. The "Type:" section has three radio buttons: "Subjects" (selected), "Keywords", and "Titles". The "File:" section has a "Choose File" button and the text "no file selected". At the bottom of the form are "SAVE" and "CANCEL" buttons. Below the form is a "History" section with the following text: "Subjects last uploaded on 2013-02-25 from file LOCTermsJames.csv.", "Keywords last uploaded on 2013-02-19 from file SPOKE-Keywords.csv.", and "Titles last uploaded on 2013-02-21 from file OHMS-Titles-Master-01-14-12.csv.". Below the history is a "Delete existing entries:" section with links for "Keywords" (Keywords_WWII_01_14_13.csv, SPOKE) and "Subjects" (LCSH-Complete, LCSH-SpokeDB, LCSH-WWII-V10). Under "Titles" are links for "Standard Titles" and "Titles_WWII_01_14_12.csv".

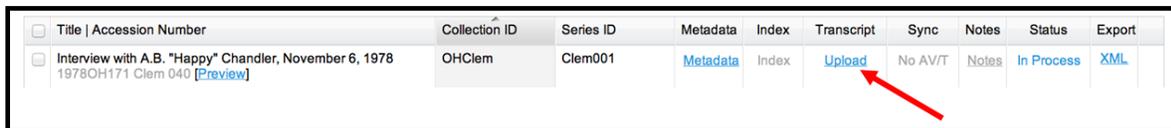
- Thesaurus Upload Troubleshooting: If the thesaurus upload is failing, typically this indicates the presence of a special character such as an ampersand which needs to be "escaped" for utilization in an xml environment. For example: Utilize &#amp; instead of simply typing an &.

7.0 TRANSCRIPT SYNC MODULE

The purpose of the transcript sync module is to connect a user's search within the text to corresponding moments in the online audio/video interview. In order to do this, OHMS has a user friendly, efficient method to drop time code into a transcript at 1-minute intervals.

7.1 UPLOADING A TRANSCRIPT

In order for the “sync” function to be enabled, you must first upload a plain text version (.txt saved in Unicode UTF-8) of the interview transcript which has been modified according to the *OHMS Transcript Formatting Guide* available at OralHistoryOnline.org.



Title Accession Number	Collection ID	Series ID	Metadata	Index	Transcript	Sync	Notes	Status	Export
Interview with A.B. "Happy" Chandler, November 6, 1978 1978OH171 Clem 040 [Preview]	OHclem	Clem001	Metadata	Index	Upload	No AV/T	Notes	In Process	XML

Word processing applications such as Microsoft Word embed a great deal of underlying formatting that we may take for granted. Much of this underlying formatting is incompatible with XML. The process of preparing your transcripts for use in OHMS is critical for successful implementation.

7.2 INITIATING TRANSCRIPT SYNCHRONIZATION

Once you have uploaded a transcript, you can begin the sync process. The “Sync” column of the interview manager will indicate an interview’s eligibility for the transcript sync process.

- “No T”: No transcript has been uploaded.
- “No AV”: No hyperlink is present in the media URL field of an interview’s metadata.
- “No AV/T”: No transcript has been uploaded and no hyperlink is present in the media URL field of an interview’s metadata.
- “Sync”: If this word is blue, an interview is ready to sync. If red, sync is ready for QC. Purple means Active QC. If green, someone has indicated that they have finished syncing a transcript.

By design, the OHMS transcript sync module only allows you to listen to a brief interval located at the end of each minute of an interview. The default interval is 10 seconds. You can shorten or lengthen this lead time by changing the time interval next to the clock.

When beginning the transcript sync process, press “Sync” in the “Sync” column of the Interview Manager. This will open the transcript sync module containing the text, the appropriate player, along with a controller for that player to the right.

SAMPLE: Interview with Fred Noe, November 14, 2013

In Process [RETURN TO INTERVIEWS](#)

[EDIT TRANSCRIPT](#) [SAVE](#)

2013oh464_bik025_noe_m001_p000_mst_acc001

00:00 1:06:38 00:00:00

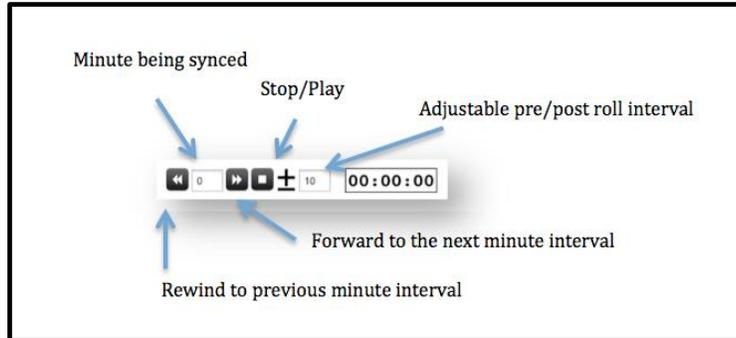
UNKNOWN MALE: -----(??)
JIM KORKORUS: Okay, let's start off, uh, with a basic question. Can you tell us your name and, um, your, your, your job title or function here at, at the distillery?
FRED NOE: I'm Fred Noe. I'm the Master Distiller here at Jim Beam.
KORKORUS: And we're sitting in a beautiful setting here. Can you describe that here on the distillery grounds?
NOE: We are in the Knob Creek Guest House on the distillery grounds, here, in Clermont.
KORKORUS: Um-hm.
NOE: Uh, we acquired this house. Uh, when we bought this property, and we use it for letting customers stay here if they come visit, and, uh, meetings, and lunches, and interviews like we're doing right now.
KORKORUS: And we're only a few miles from Bardstown, Kentucky. Uh, can you tell us, um, a little bit about the town, and is that where you were born?
NOE: Yeah. I was born and raised in Bardstown, Kentucky, the bourbon capital of the world. Bardstown's about fifteen miles from where we're sitting right now. Uh, it's, uh, was the (1:00) **home** for many, many distilleries before Prohibition. Uh, several came back after Prohibition. Now there's just a couple that are still up and running there, but that was the main industry in Bardstown back in the old days. The main street, North Third Street, uh, was known as "Distiller's Row" because of the master distillers that lived along the main street of Bardstown. Now, I guess I'm the only master distiller that's still living on Third Street in Bardstown, but.
KORKORUS: What was it like growing up in Bardstown, in that environment, in that bourbon environment? Did, what, did the bourbon families intermingle? Did they associate with each other? Were they friends? Were they competitors?
NOE: Oh, you know, growing up in Bardstown when I was a kid, there was many, many families involved in the bourbon industry, and we were all friends. I mean, Charlie Despain, who was, at the time, was the plant manager at Heaven Hill. He lived (2:00) **about** a half a block from our house. And every year at the Bourbon Open golf tournament, Charlie hosted a, a huge cocktail party in his backyard. And I can remember being, as a kid, watching the people come and go from his house that, that night, and everybody was friendly. I mean, you know

In addition to the transcript text, the player and the player/sync controller, you will see functional buttons to “Edit Transcript” or to “Save” your work. To make minor edits to the transcript, see section 7.4 of this guide.

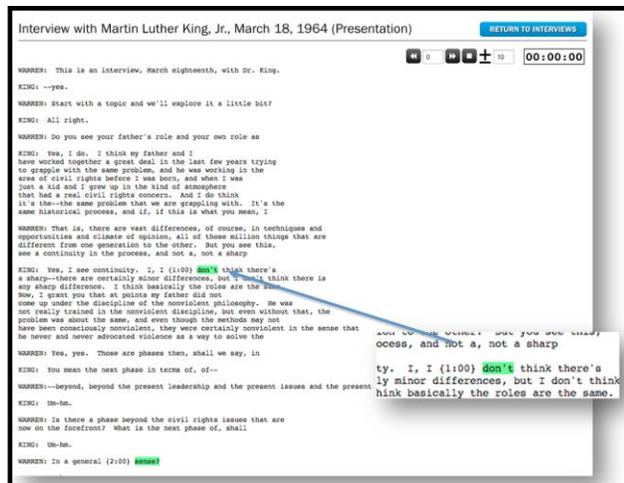
You will have to save your work when completed in order to utilize the sync points in OHMS. It is strongly recommended that you save your work periodically during the synchronization process.

7.3 SYNCHRONIZING A TRANSCRIPT

- 1) The audio or video will begin upon opening the transcript sync module / pressing the “play” button on the player.



- 2) Click the forward button to be taken to the 00:00:50 mark on the first minute.
- 3) You will hear two chimes. Your first chime (lower pitched) is a warning, indicating that you have ten seconds (or otherwise specified interval) to locate the corresponding section of the transcript.
- 4) When you have found the text in the transcript that corresponds to what you hear, follow along.
- 5) At the minute mark, a second chime (higher pitched) will ring.
- 6) When the second chime rings, click on the appropriate word in the transcript that is heard during (or closest to) this chime. Clicking on the corresponding word places a time code marker into the text (marked in green). If you succeed in placing the marker, you are automatically taken to the next interval (00:01:50). If you fail to place the marker in the allotted time, the same audio segment will replay after the post roll completes (default is 10 seconds). It will continue to repeat until the marker is placed.

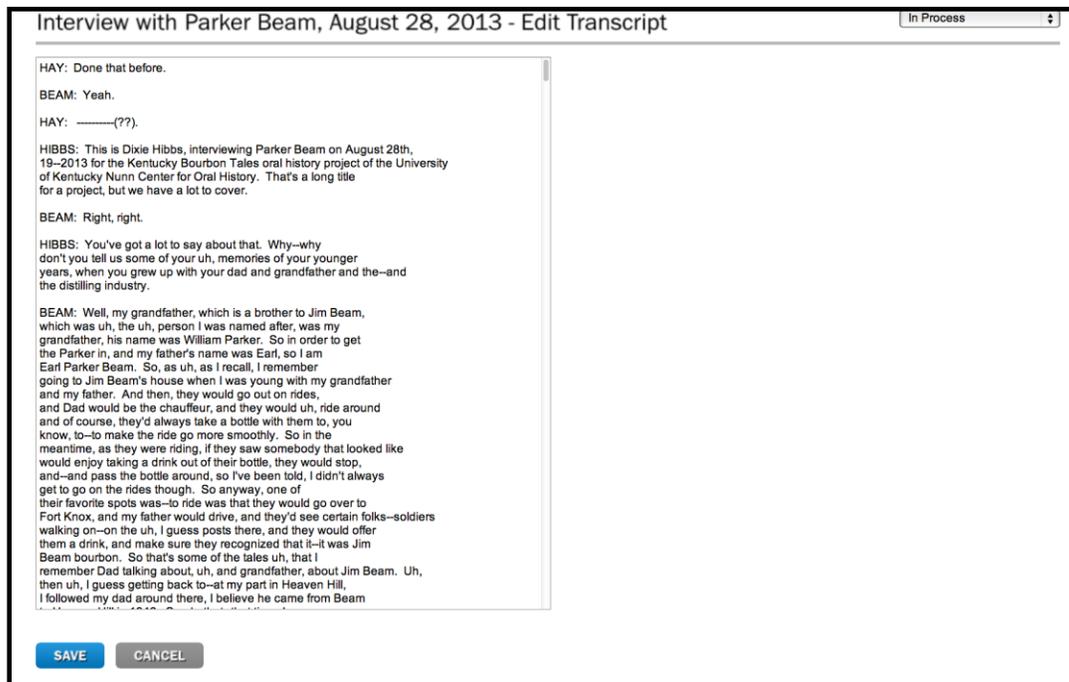


- 7) You can adjust the sync point by rewinding back or forwarding to the appropriate segment. This is indicated by the clock and the minute-interval counter. Then you can correct your sync placement when the bell rings on the minute.

- 8) You must save your work prior to exiting or your sync data will be lost. There are save buttons at the top and bottom of the transcript.

7.4 MAKING MINOR EDITS DURING TRANSCRIPT SYNC

If at any time during the syncing process you wish to correct or edit the transcript, you can click the "Edit Transcript" button at the top or bottom of the transcript. This will automatically save the points you have already synced, and take you to the editing module. From here, you may make changes to the transcript, but be aware that this may change the placement of any sync points further along in the transcript.



The "Edit Transcript" feature in the Transcript Sync module is designed for minor edits only. Substantive edits should be made on the original .txt version of the transcript and will require you to re-upload the transcript. Substantive edits will alter the line breaks and, therefore, alter sync points following the substantive edit.

7.5 TRANSCRIPT SYNC: HINTS AND REMINDERS

- Using the control+f / command+f keyboard shortcut in order to search for a word you hear in the 10-second lead time to quickly locate the Sync point in the transcript. The default 10-second lead is adjustable, you can go faster or slower if needed.
- It is recommended that you do not upload the transcript with title or disclaimer pages prior to the beginning of the actual transcript, as this will interfere with your time-code syncing efforts.
- Consult the Nunn Center guide for preparing transcripts for OHMS. This is a multi-step process that includes the removal of page numbers, headers, footers, the conversion of smart quotes to straight quotes, clearing formatting such as section breaks and tabs. While this seems cumbersome at first, you are creating a tremendous “preservation” version of your transcript that will remove dependencies on proprietary word processing applications.

8.0 THE INTERVIEW MANAGER “NOTES” FEATURE

<input type="checkbox"/>	Title Accession Number	Collection ID	Series ID	Metadata	Index	Transcript	Sync	Notes	Status	Export
<input type="checkbox"/>	Interview with A.B. "Happy" Chandler, November 6, 1978 1978OH171 Clem 040 [Preview]	OHClcm	Clem001	Metadata	Index	Upload	No AV/IT	Notes	In Process	XML

The notes function in OHMS can serve many purposes. These include flagging interviews with audio or video malfunctions, flagging interviews that need to be reviewed for possible restriction, or other issues that need to be addressed by your repository's administrator. Clicking "Notes" in the interview manager allows you to write a note explaining an issue.

Administrators will be automatically notified by email when a note is created. They can click on the notes column to read the note and mark it "Resolved" when the issue has been fixed. If a note is unresolved, the "Notes" indicator in the interview manager will be red. When resolved, the button will turn green.

Notes

[RETURN TO INTERVIEW MANAGER](#)

There are currently no notes associated with this interview.

Add a note here. When you're done, click the "Add Note" button below.

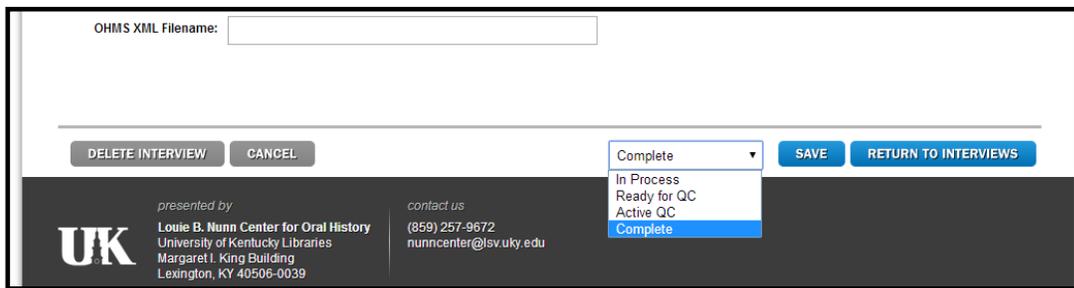
[ADD NOTE](#)

9.0 WORKFLOW MANAGEMENT

The OHMS interview manager has a workflow management component to demonstrate the processing and quality control status as well as an overall status update. The Nunn Center uses this feature to communicate readiness to various participants in the OHMS workflow (indexers, sync-ers, archivists, digital library representatives). An indexer can use the workflow status to mark that an interview has been started but is not completed, indicate which phase of the process the interview is in, and indicate that the interview has been completed.

Processing

The status component of workflow management is handled individually through the metadata, indexing, and transcript syncing modules. Each page has a drop-down menu that allows you to choose from four options to set the status of each component.



Changing the status of these modules will automatically change the color of that module's indicator in the interview manager, giving you a visual indication of the status.

- "In Process": blue
- "Ready for QC": red
- "Active QC": purple
- "Complete": green

The indexing module also has an additional option: "Not Applicable", which will change the color of the word "Index" to gray in the interview manager.

<input type="checkbox"/>	Interview with Louie B. Nunn, March 31, 1994 1994OH041 Coop 099 [Preview]	OHCoop	Coop001	Metadata	Index	Re-Upload	Sync	Notes	In Process	XML
<input type="checkbox"/>	Interview with Oscar Dishman, November 22, 1993 1994OH002 KH 567 [Preview]	OHKH	KH004	Metadata	Index	Re-Upload	Sync	Notes	In Process	XML
<input type="checkbox"/>	Interview with Oscar Dishman, Jr., November 22, 1993 1994OH002 KH 567 [Preview]	OHKH	KH004	Metadata	Index	Re-Upload	Sync	Notes	In Process	XML
<input type="checkbox"/>	Interview with Elizabeth Skinner, February 17, 1988 1988OH124 KH 452 [Preview]	OHKH	KH038	Metadata	Index	Re-Upload	Sync	Notes	Completed	XML

Status

The status measurement is a way to communicate to other team members where the interview is in the overall OHMS process. Because we often have multiple interviews from different projects that are processed all at once, it is helpful to have an "at-a-glance" view of their statuses. Additionally, it is useful to have final confirmation that the OHMS export and the archival ingest

of the XML file has been completed so that you can remove the interview from the OHMS application, in preparation for making it publicly accessible via the OHMS viewer. This process is automated based upon the status of each module within the interview manager. An interview automatically begins with a blue "In Process" status. When all status indicators for an interview are green (or gray, indicating that they are not applicable), the status indicator will automatically turn green indicating that the interview is "Complete".

10.0 THE PREVIEW VIEWER

As soon as an interview has been loaded into OHMS and has active links to a media source, a preview option will be available.

<input type="checkbox"/>	Title Accession Number	Collection ID	Series ID	Metadata	Index	Transcript	Sync	Notes	Status	Export
<input type="checkbox"/>	Interview with A.B. "Happy" Chandler, November 6, 1978 1978OH171 Clem 040 [Preview]	OHClcm	Clem001	Metadata	Index	Upload	No AVIT	Notes	In Process	XML

Clicking on the preview option activates the OHMS viewer where you can preview the interview index or transcript synchronization as the user would experience it. This function helps optimize the effectiveness of the quality control phase. This is a back-end viewer used for preview purposes, and is only accessible to those given permission to log into the OHMS application.

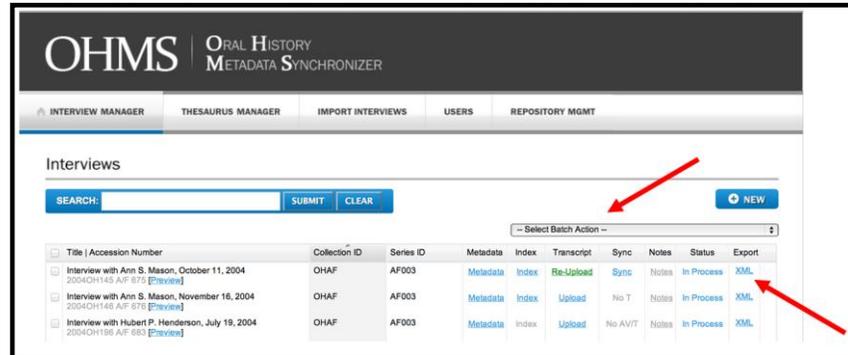
UK Interview with Joseph Tyler Gayheart, June 11, 2010
 Louis B. Nunn Center for Oral History, University of Kentucky Libraries
 Col. Arthur L. Kelly American Veterans Oral History Collection, From Combat to Kentucky
 via serotings Albany, interviewee | 2018OH007 WK 368

0:37 - Introduction
 4:03 - The commitment
 18:49 - 9/11
 23:32 - Bootcamp
 39:44 - Training and specialization
 46:37 - Training and specialization: Hawaii
 52:30 - Deployment to Afghanistan
 60:50 - Afghanistan
 70:37 - Convoys in Afghanistan
 90:53 - Guerilla warfare
 102:20 - Intelligence reports and working with Afghanis
 107:15 - Education
 111:41 - Transition home: employment and education
 114:08 - Transition home: civilians
 116:56 - Working with veterans at University of Kentucky

TRANSCRIPT INDEX
 Search this Index
 Search

11.0 EXPORTING THE OHMS XML FILE

When you are satisfied with the interview's level of processing, the XML file must be exported for use with the OHMS Viewer. Upon clicking the “XML” export link, an XML document will be created and downloaded with a filename derived from the “OHMS XML filename” field in the interview. If no filename is present in the field, it will default to the interview's accession number. It is recommended that you change the filename to the interview's unique identifier. Upon completion of your indexed or synchronized interview:



- You will need to export the OHMS XML file either individually or using the batch export function. The exported file will be auto named, unless you specify in the metadata field “XML Filename” the name you want for the exported file.

The simple XML file that is exported by OHMS is designed for portability and interoperability. This XML file contains data from each of the fields present in the Metadata Module, includes the uploaded transcript with corresponding sync information, as well as the contents of an index.

There are fields present in the exported OHMS XML file that do not render in the OHMS Viewer. These fields are present in order to, potentially, utilize the OHMS XML file as a vehicle for transporting metadata, in addition to enabling the core functionality provided by the OHMS Viewer.

```
<?xml version="1.0" encoding="UTF-8"?>
<ROOT>
  <record dt="2016-04-07" id="00023530">
    <version>4</version>
    <date format="yyyy-mm-dd">
      <date_nonpreferred_format>Unknown Date</date_nonpreferred_format>
    <cms_record_id/>
    <title>Blank XML</title>
    <accession/>
    <duration/>
    <collection_id/>
    <collection_name/>
    <series_id/>
    <series_name/>
    <repository>Workshop</repository>
    <funding/>
    <repository_url/>
    <file_name/>
    <sync/>
    <media_id/>
    <media_url/>
    <mediafile>
      <host>Other</host>
      <host_account_id/>
      <host_player_id/>
      <host_clip_id/>
      <clip_format/>
    </mediafile>
    <kembed/>
    <language/>
    <index/>
    <type/>
    <description/>
    <rel/>
    <transcript/>
    <rights/>
    <fmt/>
    <usage/>
    <userrestrict>0</userrestrict>
    <xmllocation/>
    <xmlfilename/>
    <collection_link/>
    <series_link/>
  </record>
</ROOT>
```

11.1 EXPORTING A CSV VERSION OF YOUR DATA

This functionality has been added with the purpose of transporting metadata from OHMS to a content management system. Although transcript and index data is included in the CSV export, the CSV export contains no OHMS functionality.

This export has been added to include a convenient way of transporting metadata from OHMS to a CMS such as Omeka or CONTENTdm. The OHMS XML is still required for the OHMS Viewer to function. Transcript and index contents are included in the exported CSV file as a potentially simple method for incorporation of the transcript and index-level metadata into the global search of a CMS. However, the contents of these fields in the CSV file are not intended for public viewing (all formatting has been removed).

This CSV export differs from the initial metadata import, which requires the provided OHMS CSV import template. The *exported* CSV is not designed to be re-imported into OHMS.

12.0 THE OHMS VIEWER

OHMS is a two part system that includes the OHMS Application (where you do the preparatory work) and the OHMS Viewer (where you deliver the recording to the user).

Although you can preview your work inside the OHMS Application, this is not meant to be a public access point. In order to provide the OHMS user experience (searchable time-synchronized transcripts or indexes) for your online audio or video, you will need to:

- Install the latest version of the OHMS Viewer in your environment and configure the OHMS Viewer to work in your environment
- Export the OHMS XML file from the OHMS Application
- Place the OHMS XML file in your environment (in accordance with the viewer configuration)
- Link to the OHMS XML file

12.1 INSTALLING AND CONFIGURING THE OHMS VIEWER

You will need to consult the various guides for specific information regarding the installation of your OHMS Viewer (<http://www.oralhistoryonline.org/documentation/>), however, there are some basic principles that we will outline here:

- Identify where you will be installing your OHMS Viewer. The OHMS Viewer requires a basic LAMP server environment and works well in either an enterprise or in a third-party, shared hosted environment (such as Godaddy.com or Reclaim Hosting).
- Download the latest version of the OHMS Viewer (<http://www.oralhistoryonline.org/start-using-ohms/>)
- Configure your OHMS Viewer. There are some basic steps for viewer configuration. Most importantly, you will need to tell the OHMS Viewer where you will be placing your OHMS XML files and identifying from which OHMS Repository your XML files originated (Repository Name).
- Link to the XML file from your Content Management System or website.
- Some institutions are utilizing iFrames to embed the OHMS Viewer into systems such as CONTENTdm, Omeka, or Wordpress.
- Place the downloaded XML file in the designated “Cachefiles” directory identified during OHMS Viewer installation.

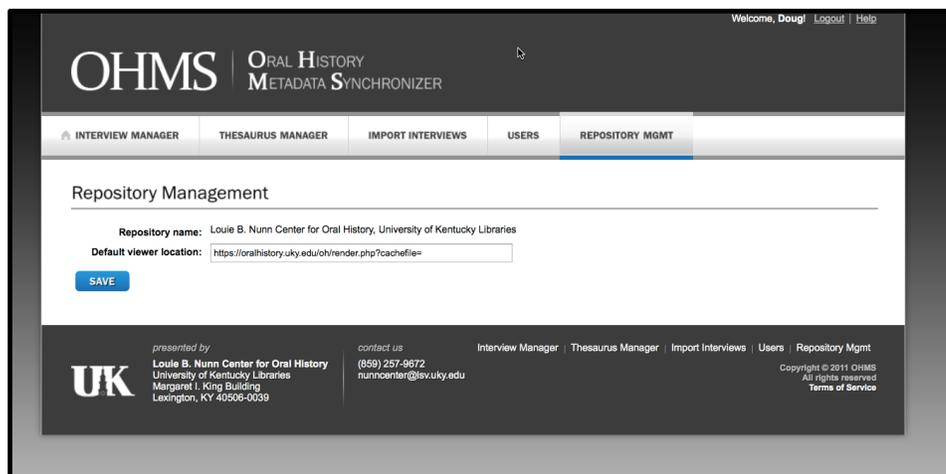
12.2 LINKING TO YOUR OHMS XML FILE

Construct a hyperlink to the XML file to call up the OHMS viewer. Part 1 of the URL will always remain the same, linking to the location of the OHMS viewer. Part 2 will always be the corresponding filename for the OHMS XML file, placed in the cachefiles subdirectory of the OHMS viewer.



Place hyperlink in appropriate location of CMS. When transporting interviews into a content management system like Omeka this is one of the fields that can be automatically imported from the OHMS XML.

This link can be generated automatically and placed into the OHMS XML file automatically. This can be useful if your workflow could be constructed to harvest those links from the XML and utilized by the content management system you are using. In order to take advantage of this feature, repository admins can enter a default viewer location. As long as the metadata element "XML Filename" is populated for the particular item you are exporting, OHMS will combine the root location of the OHMS Viewer with the specified "XML filename, forming a functional link that populates the OHMS "XML Location" field in the exported XML file.



12.3 UPGRADING YOUR OHMS VIEWER

- Make offline copy of:
 - `config.ini` file located in the *config* subdirectory.
 - *cache*file subdirectory (or directory configured to house the OHMS xml files).
- Download the latest version of the OHMS Viewer. Unzip download.
- Access your viewer on the server (via ftp or web interface).
- Change the filename of the old viewer.
 - Example: If previous version of OHMS Viewer is called *OHMS_Viewer*, change to *OHMS_Viewer_3.3.1*
- Create new directory labeled *OHMS_Viewer* or what your previous viewer was called.
- Copy your archived *config.ini* in the new *config directory*.
- Copy your archived *cache*files subdirectory into the root of the new viewer directory.

Note: the new viewer does not contain a `config.ini` or a *cache*files directory. You had to set this up upon initial setup. Please back these up regularly, but especially before an update/upgrade to a new version of the viewer.

13.0 REMINDERS/KNOWN LIMITATIONS/BUGS

- The OHMS Application is hosted by the University of Kentucky Libraries and is periodically updated for you. In some circumstances, these updates require scheduled downtime. The OHMS Viewer, however, is an entity that you install and manage. It is recommended that you keep your OHMS Viewer up to date.
- Internet Explorer is not recommended for the OHMS Application at this time. This does not involve the user interface of the OHMS Viewer, just the OHMS Application. Compatibility is best when using Firefox, Chrome, or Safari.
- The OHMS transcript sync and indexing modules create time-dependent metadata. You should not make any changes to the media time-code after processing in OHMS. Any edits that change the duration of the interview will alter the location of the sync markers and index points, and thus disrupt the correspondence between markers and content.
- It is strongly recommended that you preserve your OHMS XML files following export. These will be critical for re-importing for updating information in a record or fixing a rare typo.