

OHMS (Oral History Metadata Synchronizer)

User Guide

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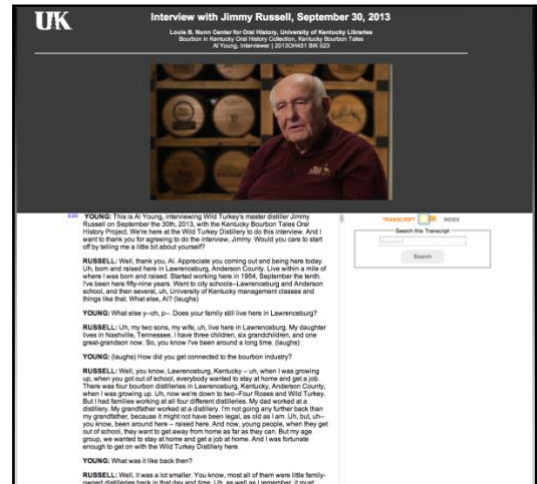
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1.0 OVERVIEW

OHMS is a system designed to enhance access to online oral histories (or other time-based media) efficiently and affordably. The primary purpose of OHMS is to create a framework, space, and user interface to enhance the search and discovery of information in online audio and video by connecting textual searches of a synchronized transcript or of an index to the corresponding moments in the online audio and video sources. OHMS was designed to create an interoperable and sustainable framework using simple, open formats and technologies. There are two primary components of the OHMS system:

The OHMS Application: The OHMS application, integrated with the Aviary platform (<https://aviaryplatform.com>), is the free, online space where the preparation of resources is completed. This is the back end, web-based application where metadata is imported or created, transcripts are uploaded and synchronized, or descriptive indexes are created. Upon completion, the interview record, which includes the synchronized transcript and/or time-coded index, is exported as a simple XML file. When this XML file is located on a web server, it interfaces with the content management system through the OHMS Viewer. OHMS is integrated into the Aviary Platform. Accounts are free.



The OHMS Viewer: The OHMS viewer is where the public interacts with a resource prepared for public access using the OHMS Application. When a user clicks on the appropriate link, the OHMS viewer loads. The viewer combines select interview-level metadata and the intra-interview-level or segment-level metadata with the audio or video player. The OHMS viewer utilizes a built-in player for delivering the directly-linked audio/video. Additionally, OHMS is also designed to work with Kaltura, YouTube, Vimeo, Avalon, and SoundCloud streaming solutions.

1.1 OHMS VIEWER EXAMPLES

The following links are examples of the OHMS viewer in action:

[OHMS Viewer: synchronized transcript](#)

[OHMS Viewer: interview index](#)

[OHMS Viewer: synchronized transcript + interview index](#)

[OHMS Viewer: bilingual index](#)

[OHMS Viewer: transcript + translation](#)

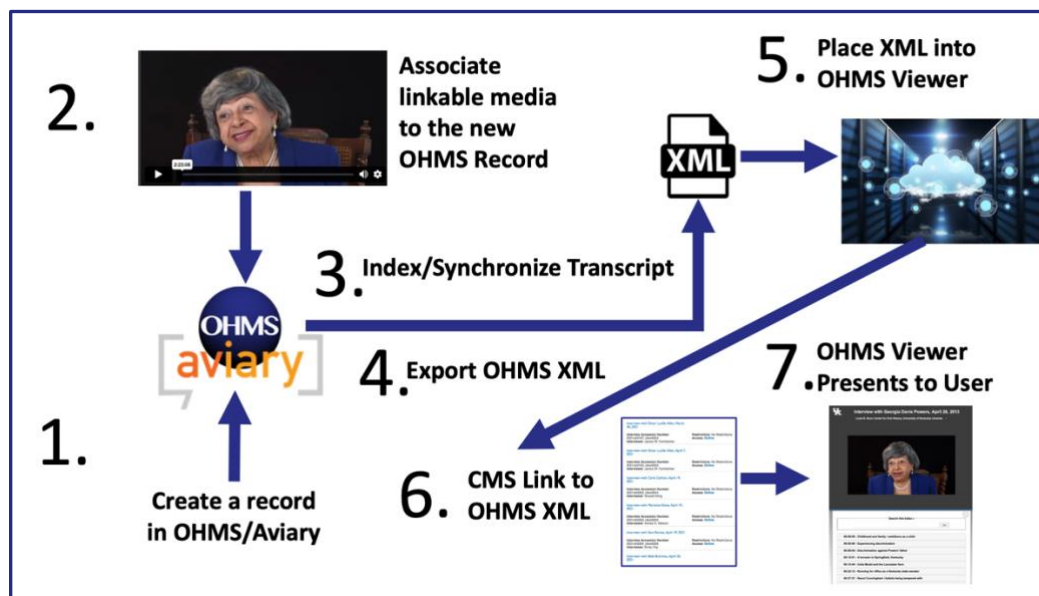
1.2 OHMS WORKFLOW SUMMARY

OHMS Application (preparing for public access)

- Create OHMS/Aviary account (free) <https://www.aviaryplatform.com/pricing#ohms-aviary-subscription>
- Host audio or video in a location where OHMS can access/interact with the media. [See Section 4.2](#)
- Log in to OHMS/Aviary Application account.
- Import or create new OHMS “Interview” record.
 - a. Link OHMS record to online audio/video
- Synchronize transcript or index the interview
 - a. Save work
- Export OHMS XML file when work is completed

OHMS Viewer (making interviews public)

- Install and configure the OHMS Viewer on a server.
- Place XML file into directory within installation of the OHMS Viewer
- From the Content Management System, link to the OHMS XML file which presents utilizing the OHMS Viewer.
- Through the Content Management System the user interacts with interview via the OHMS Viewer



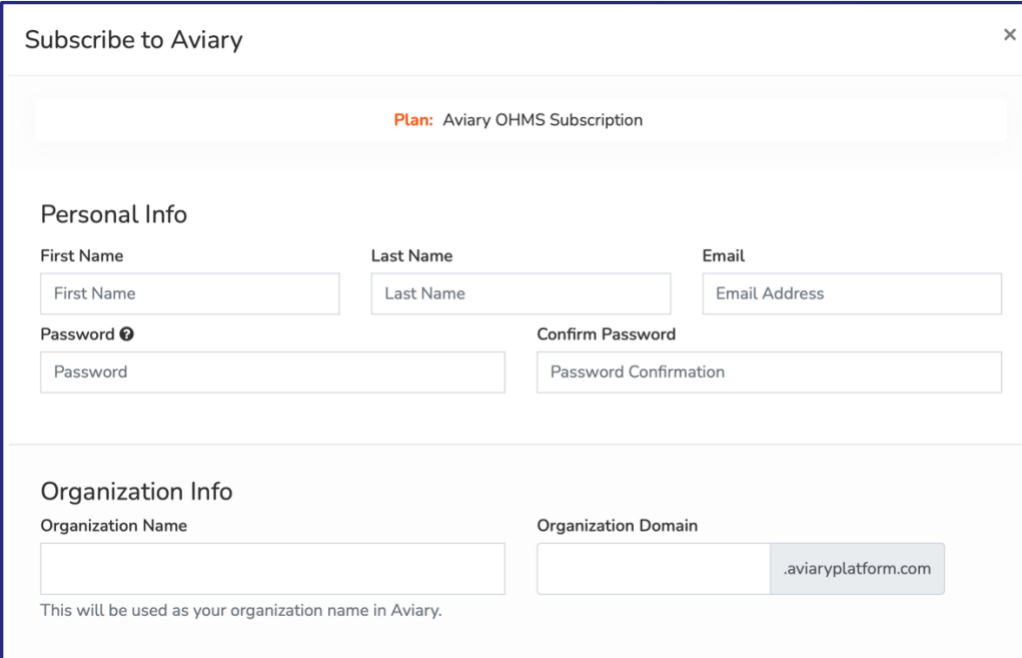
2.0 OHMS APP: OVERVIEW

OHMS is a utility integrated into the Aviary platform. Your “OHMS Organization” (formerly called the “OHMS Repository”) is an online dedicated space for processing a specific group of resources. The “Organization Owner” creates the OHMS Organization.” Once the organizational owner establishes an OHMS Organization, the owner can add additional users associated with that repository. All accounts related to an OHMS Organization will only see materials associated with that organization when logged in with their individual username and password.

An organization can be requested here: <https://www.aviaryplatform.com/pricing#ohms-aviary-subscription>

2.1 CREATING AN OHMS ORGANIZATION IN AVIARY

1. If you are not a current Aviary organization owner, you must first create your OHMS organization. This is comparable to the “OHMS Repository” in the older version of OHMS. NOTE: This initial setup is not needed if you had a legacy OHMS repository that was migrated.
2. Go to the Aviary OHMS Subscription page: <https://www.aviaryplatform.com/pricing#ohms-aviary-subscription>
3. Fill out the details.
4. You must name your organization and determine the preferred prefix of your organization domain. The organization domain will be where you log in to your OHMS organization.



The screenshot shows a web form titled "Subscribe to Aviary" with a close button (X) in the top right corner. The form is divided into two main sections: "Personal Info" and "Organization Info".

Personal Info

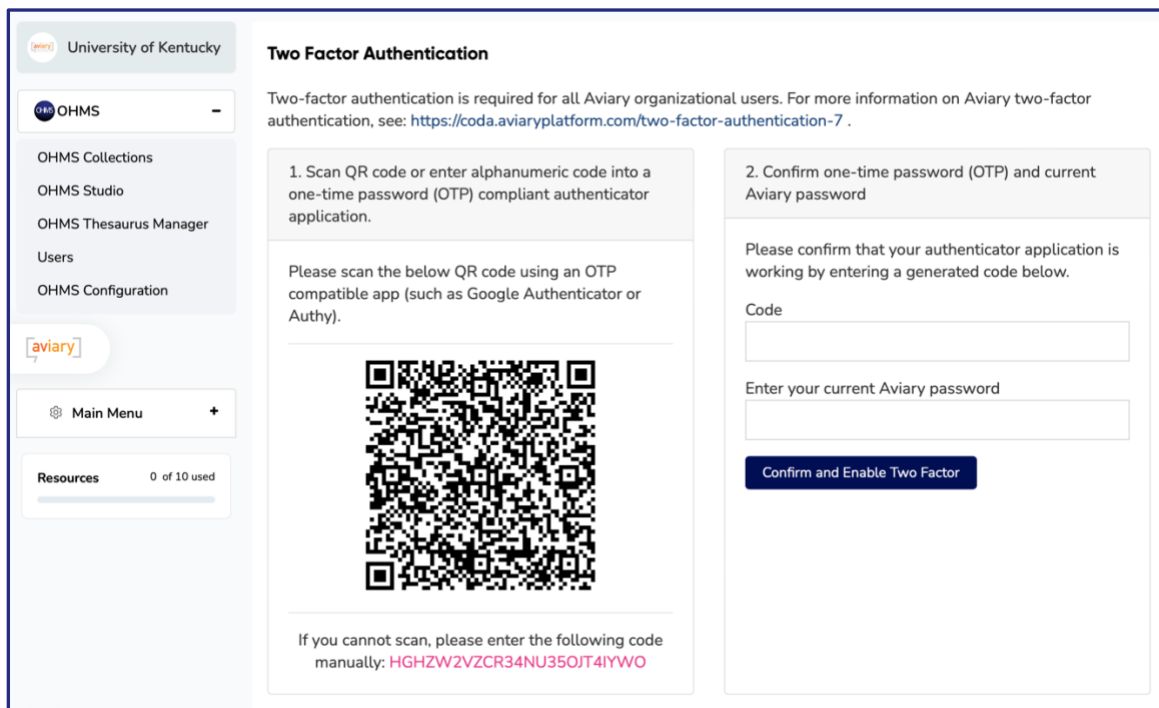
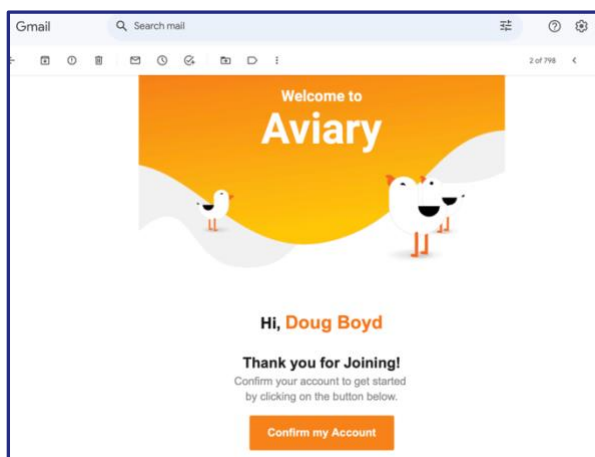
- Plan:** A dropdown menu currently showing "Aviary OHMS Subscription".
- First Name:** A text input field with the placeholder "First Name".
- Last Name:** A text input field with the placeholder "Last Name".
- Email:** A text input field with the placeholder "Email Address".
- Password:** A text input field with a question mark icon and the placeholder "Password".
- Confirm Password:** A text input field with the placeholder "Password Confirmation".

Organization Info

- Organization Name:** A text input field with a placeholder.
- Organization Domain:** A text input field with a placeholder and a dropdown menu currently showing ".aviaryplatform.com".

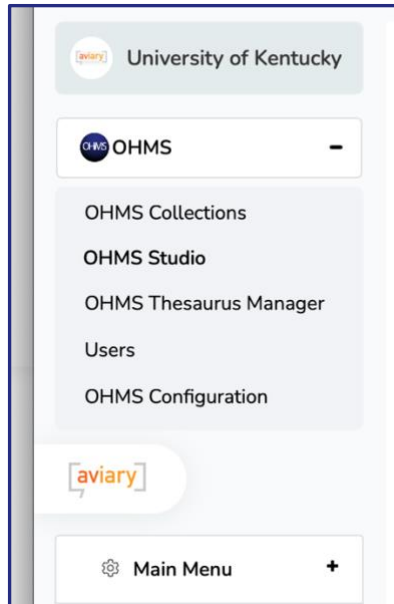
Below the "Organization Name" field, there is a note: "This will be used as your organization name in Aviary."

5. Upon submitting your OHMS organization request, you will receive an email confirming your submission.
6. When you click on “**Confirm my Account**” you will be prompted to set up 2-factor authentication **using an authentication app** such as **Google Authenticator, Authy, or Duo**). Follow the directions for setting 2-factor authentication in accordance with your chosen authenticator app. For example, in Duo, you select the “Add” button to add a new account.



2.2 Overview of the New OHMS Organization

Once an organization is created, the organization owner logs into Aviary/OHMS using the assigned username and password and the 2-factor authentication. Once logged into the OHMS application, assigned users can begin to prepare oral history interview and other audio or video resources for public access. There are a few major components of the OHMS application:



OHMS Collections: Record groupings into collections/series

OHMS Studio: Formerly called the “Interview Manager,” this area is the central area to initiate and manage your OHMS records. Provides navigation to major functional areas of OHMS and the monitoring of workflow. This is where users can access the OHMS Indexing and the Transcript Synchronization Utilities.

OHMS Thesaurus Manager: Manage controlled vocabularies.

Users: Assign rights and permissions for users assigned to the OHMS Organization.

OHMS Configuration: Manage other settings for the OHMS Organization.

2.3 TEAM MEMBERS AND USER ROLES

The individual originally responsible for initially creating the OHMS Organization is automatically assigned as the “Organization Owner.” From the Users

The “Project Editor” and “Project User” roles will only see records that they have been assigned by a repository administrator. All roles are assigned from the User Management page viewable only by the repository administrator. The following identifies the different roles that can be assigned and the rights that accompany those roles:

ORGANIZATION OWNER

- Organization management
- Create, import, or delete records
- Add or delete users and assign user roles
- Create assignments
- Resolve “Notes”
- Create, import, or delete new records
- Enter metadata
- Export XML and CSV Files
- Thesaurus management
- Index and Synchronize

ORGANIZATION ADMINISTRATOR

- Create, import., or delete records
- Add users and assign user roles. Cannot change permissions of Organization Owners
- Create assignments
- Enter metadata
- Export XML and CSV Files
- Thesaurus management
- Index and Synchronize
- Submit Notes

ORGANIZATION USER

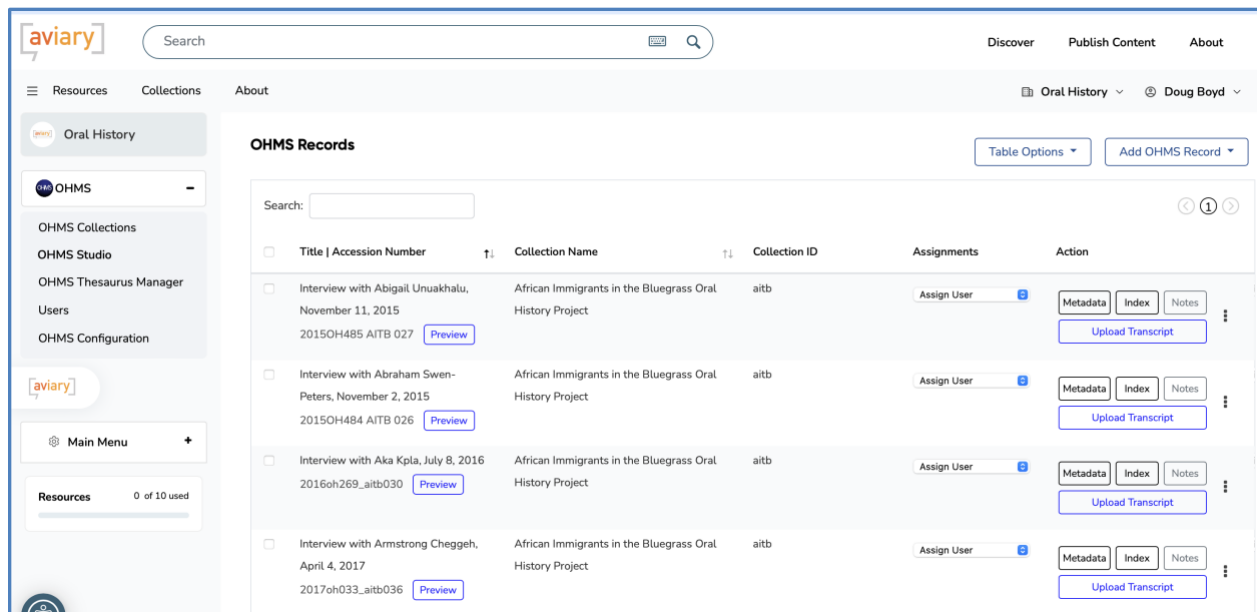
- View metadata
- Index and Synchronize
- Submit Notes

OHMS ASSIGNED USER

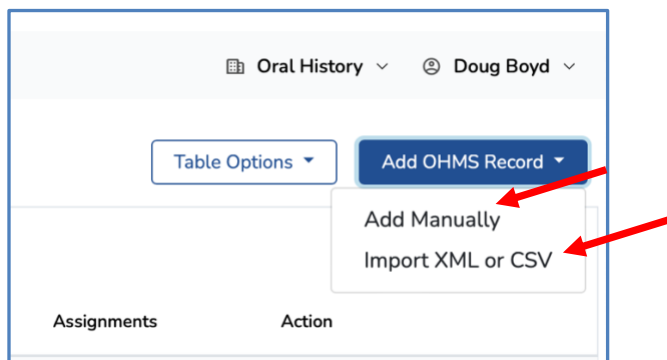
- For interviews assigned: View metadata
- For interviews assigned: Index and Synchronize
- For interviews assigned: Submit Notes

3.0 OHMS STUDIO

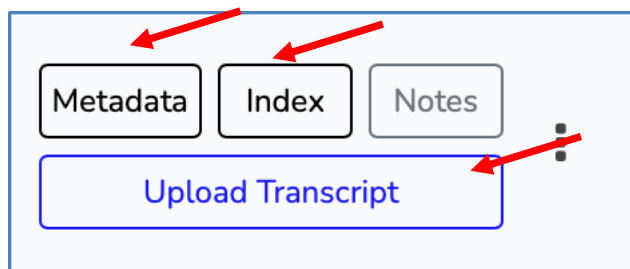
The OHMS Studio is the main hub of the OHMS application. The OHMS Studio is where you:



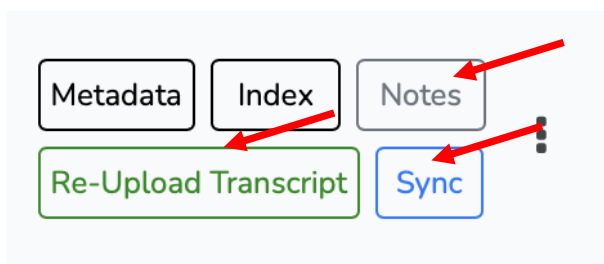
1. Create new records, input records.



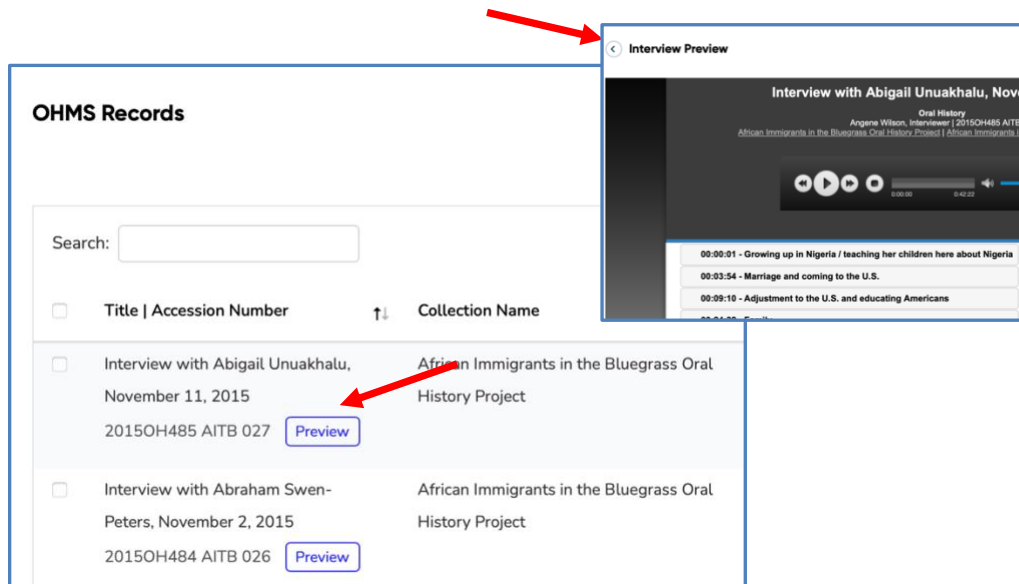
2. Action: Input or edit item-level metadata
3. Action: Initiate the indexing utility
4. Action: Upload transcript



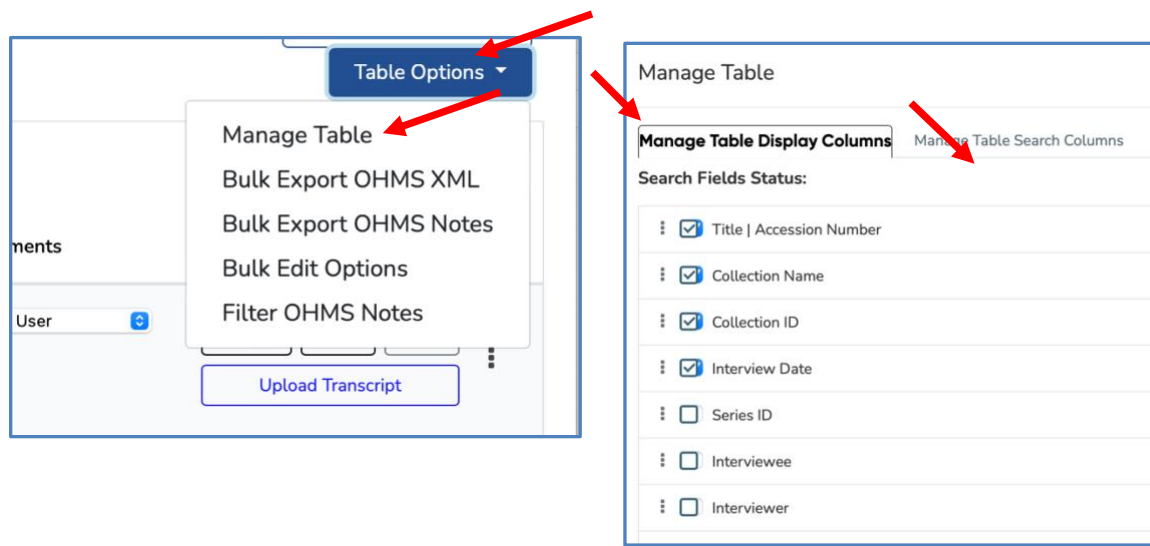
5. Action: Initiate transcription synchronization utility
6. Action: Re-upload / replace transcript.
7. Action: Create Note pertaining to record.



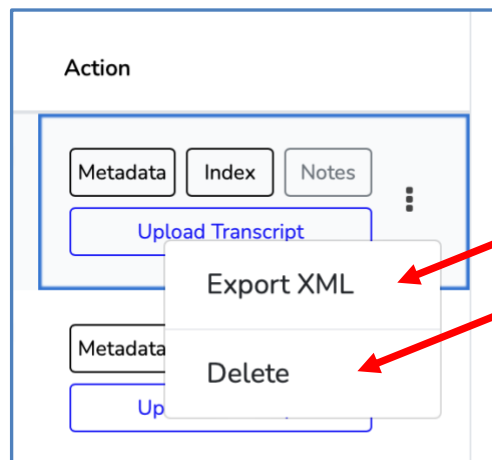
8. Review work in Preview Viewer



9. Customize OHMS Studio Fields View and Search Behavior



10. Export or Delete the Individual OHMS XML



11. Bulk Action: Export OHMS XML (Selection Required)

The screenshot shows the 'OHMS Records' interface. At the top right, there is a button 'Add OHMS Record' and a dropdown menu 'Table Options'. The 'Table Options' menu is open, showing options: 'Manage Table', 'Bulk Export OHMS XML', 'Bulk Export OHMS Notes', 'Bulk Edit Options', and 'Filter OHMS Notes'. The 'Bulk Export OHMS XML' option is highlighted. Below the menu, there is a search bar and a status bar indicating '100 Interviews selected'. The main table has columns: 'Title | Accession Number', 'Collection Name', and 'Assignments'. The first three rows of the table are visible, each with a 'Preview' button and an 'Upload Transcript' button. Red arrows point to the 'Table Options' button, the 'Bulk Export OHMS XML' option, and the 'Title | Accession Number' column header.

<input checked="" type="checkbox"/>	Title Accession Number	Collection Name	Assignments
<input checked="" type="checkbox"/>	Interview with Abigail Unuakhalu, November 11, 2015 2015OH485 AITB 027	African Immigrants i History Project	Assign User
<input checked="" type="checkbox"/>	Interview with Abraham Swen-Peters, November 2, 2015 2015OH484 AITB 026	African Immigrants i History Project	Assign User
<input checked="" type="checkbox"/>	Interview with Aften Locken, April 14, 2023 2023oh0080_bikw0048	Bourbon in Kentucky Oral History Project	Assign User

12. Bulk Action: Export Notes (Selection Required)

The screenshot shows the 'OHMS Records' interface. At the top right, there is a button 'Add OHMS Record' and a dropdown menu 'Table Options'. The 'Table Options' menu is open, showing options: 'Manage Table', 'Bulk Export OHMS XML', 'Bulk Export OHMS Notes', 'Bulk Edit Options', and 'Filter OHMS Notes'. The 'Bulk Export OHMS Notes' option is highlighted. Below the menu, there is a search bar and a status bar indicating '100 Interviews selected'. The main table has columns: 'Title | Accession Number', 'Collection Name', and 'Assignments'. The first three rows of the table are visible, each with a 'Preview' button and an 'Upload Transcript' button. Red arrows point to the 'Table Options' button, the 'Bulk Export OHMS Notes' option, and the 'Title | Accession Number' column header.

<input checked="" type="checkbox"/>	Title Accession Number	Collection Name	Assignments
<input checked="" type="checkbox"/>	Interview with Abigail Unuakhalu, November 11, 2015 2015OH485 AITB 027	African Immigrants i History Project	Assign User
<input checked="" type="checkbox"/>	Interview with Abraham Swen-Peters, November 2, 2015 2015OH484 AITB 026	African Immigrants i History Project	Assign User
<input checked="" type="checkbox"/>	Interview with Aften Locken, April 14, 2023 2023oh0080_bikw0048	Bourbon in Kentucky Oral History Project	Assign User

13. Bulk Action: Edit Options (Selection Required)

The screenshot displays the 'OHMS Records' interface. At the top right, there is a dropdown menu labeled 'Table Options' with a red arrow pointing to it. The dropdown menu is open, showing options: 'Manage Table', 'Bulk Export OHMS XML', 'Bulk Export OHMS Notes', 'Bulk Edit Options' (highlighted with a red arrow), and 'Filter OHMS Notes'. Below the dropdown, there is a search bar with a red arrow pointing to it, and a status bar indicating '100 Interviews selected | Clear selected | Bulk Del...'. The main table lists records with columns: 'Title | Accession Number', 'Collection Name', and 'Assignments'. Three records are visible, each with a 'Preview' button. To the right of the table, there are buttons for 'Upload Transcript' and 'Metadata', 'Index', 'Notes' tabs.

The following actions can be applied across multiple OHMS records:

The screenshot shows the 'Bulk Edit' dialog box. It has a title bar 'Bulk Edit'. Inside, there is a list of actions: 'Bulk Delete', 'Bulk Delete', 'Mark records online', 'Mark records offline', 'Mark restricted', 'Mark not restricted' (highlighted), and 'OHMS User Assignments'. At the bottom right, there are two buttons: 'Close' and 'Apply'.

14.Filter OHMS Notes

The screenshot shows the OHMS Records interface. At the top, it displays 'Collection ID: bikw' and 'Series ID: bikw'. The 'Collection Title' is 'Bourbon in Kentucky: Women in Bourbon Oral History Project' and the 'Series Title' is 'Bourbon in Kentucky: Women in Bourbon Oral History Project'. A search bar is present with the text '46 Interviews selected | Clear selected | Bulk Delete'. A dropdown menu is open, showing options: 'Manage Table', 'Bulk Export OHMS XML', 'Bulk Export OHMS Notes', 'Bulk Edit Options', and 'Filter OHMS Notes'. Red arrows point to the 'Add OHMS Record' button, the search bar, and the 'Filter OHMS Notes' option.

<input checked="" type="checkbox"/>	Title Accession Number	Collection Name	Collection	Assignments	Action
<input checked="" type="checkbox"/>	Interview with Aften Locken, April 14, 2023 2023oh0080_bikw0048 Preview	Bourbon in Kentucky: Women in Bourbon Oral History Project	bikw	Assign User	Metadata Index Notes Upload Transcript
<input checked="" type="checkbox"/>	Interview with Alex Castle, March 14, 2023 2023oh0050_bikw0040 Preview	Bourbon in Kentucky: Women in Bourbon Oral History Project	bikw	Assign User	Metadata Index Notes Upload Transcript
<input checked="" type="checkbox"/>	Interview with Amanda Schuster, April 13, 2023 2023oh0068_bikw0046 Preview	Bourbon in Kentucky: Women in Bourbon Oral History Project	bikw	Assign User	Metadata Index Notes Upload Transcript

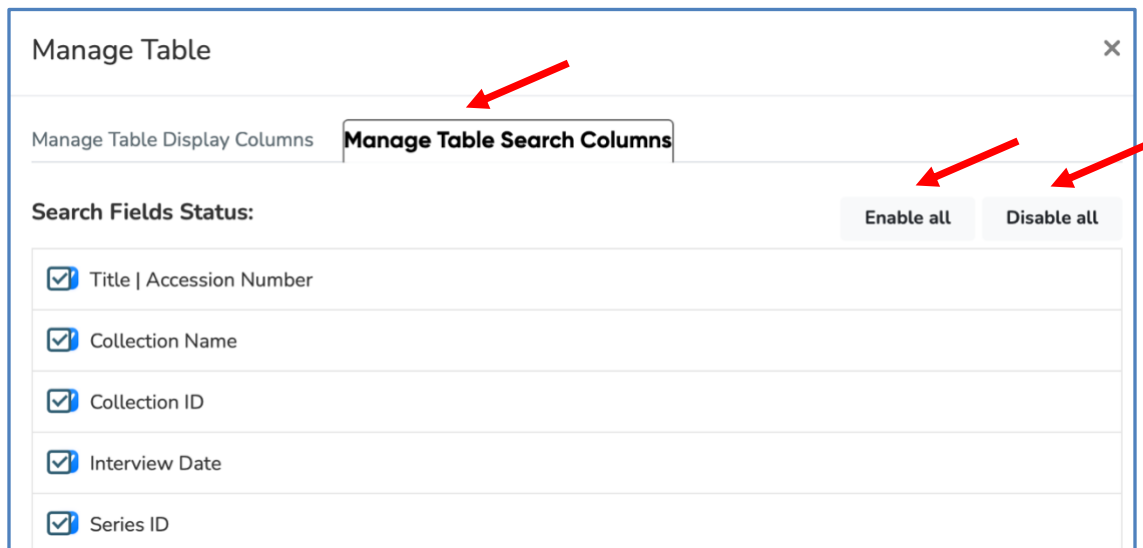
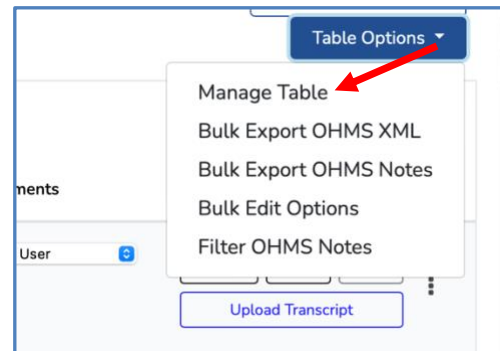
Filter Notes filters the OHMS Studio records presenting only records that contain notes, and unresolved notes are sorted at the top.

The screenshot shows the OHMS Studio interface. At the top, it displays 'Search:'. A table of records is shown, with columns: Title | Accession Number, Interview Date, Collecti, Assignments, and Action. Red arrows point to the 'Notes' button in the Action column for each record.

<input type="checkbox"/>	Title Accession Number	Interview Date	Collecti	Assignments	Action
<input type="checkbox"/>	Interview with Walter D. Huddleston, March 25, 2002 2002oh070_wdh010 Preview	03/25/2002	wdh	Assign User	Metadata Index Notes Upload Transcript
<input type="checkbox"/>	Interview with James "Jim" Veach, March 23, 2021 2021oh0186_pcrv0146 Preview	03/23/2021	pcrv	Assign User	Metadata Index Notes Upload Transcript
<input type="checkbox"/>	Interview with William H. McIntyre, Jr., April 23, 2015 2015oh342_sccr002 Preview	04/23/2015	sccr	Assign User	Metadata Index Notes Upload Transcript

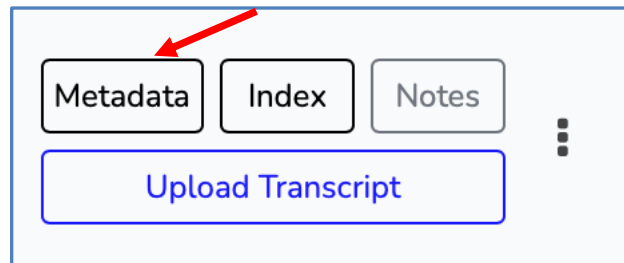
15. Search Records in the OHMS Studio

The OHMS studio can be configured to search any field.



4.0 METADATA UTILITY

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



The “Metadata” link for an item is a navigational link to the metadata record for that item. This space is where the required information for initiating activities in OHMS takes place.

On the most basic level, in order to initiate work with an interview in the OHMS application, *four* metadata elements must be completed:

- Title
- Media format (audio or video)
- Media host
- Media connection (depends on your connection type and media host)
 - Media URL (for directly linking to an audio or video file or for use with YouTube)
 - Media Host ID Information (use for specific streaming solutions: Brightcove)
 - iFrame Embed code (use for specific streaming solutions: Kaltura, Vimeo, Avalon, SoundCloud)

Once these four elements are successfully established in OHMS, a record is created and the media connection is established and the item can be indexed, or a transcript can be synchronized (as soon as the text is uploaded). Not all of the fields utilized in the item-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 resource in the XML document rendered by the OHMS Viewer. However, all of the metadata fields can be harvested by a digital library, archive, repository, or CMS and be used for migration of metadata or indexed for search.

<

Metadata Editor

StatusPlease Select

Admin and Description

Title*

Accession Number

Interviewee +

Interviewer +

Interview Date

Type

Media and Technical

Media Format*☒ Audio ☐ Video

Media host
Host

Media URL

Duration
00:00:00

Format +

Media Filename

Date (non-preferred format)

Collection ID

Collection Name

Collection Link

Series ID

Series (Name)

Series Link

Rights and Usage

Rights Statement

Usage Statement

Acknowledgment

Language

☐ Include Translation

Language For Translation

Summary

Keywords

Keywords should be separated by a semi-colon.

Subjects

Subjects should be separated by a semi-colon.

Thesaurus ⓘ

Thesaurus (Keywords)

Not Assigned

Thesaurus (Subjects)

Not Assigned

Thesaurus (Titles)

Not Assigned

Miscellaneous

CMS Record ID

OHMS XML Filename

☐ Use Restrictions*

User Notes

Return To OHMS Studio

Save

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:

ADMIN AND DESCRIPTIVE

- **Organization:** (Auto-Assigned)
- **Title** (Required)
- **Accession Number**
- **Interviewee** (First Last)
- **Interviewer** (First Last)
- **Interview Date** (YYYY-MM-DD)
- **Date (Non-preferred format)** - utilized for partial dates (*Instead of the previous field*)
- **Collection ID**
- **Collection Name**
- **Collection Link** (hyperlink)
- **Series ID**
- **Series Name**

- **Series Link** (hyperlink)
- **Summary** (Interview-Level)
- **Keywords** (Interview-Level)
- **Subjects** (Interview-Level)
-

MEDIA AND TECHNICAL

- **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.
 - See Section [4.2](#) of this guide for details.
 - **YouTube**
 - Media URL
 - See Section [4.2](#) of this guide for details.
 - **Kaltura**
 - Requires iFrame embed code
 - See Section [4.2](#) of this guide for details.
 - **Avalon**
 - Utilizes both iFrame embed code or Media URL
 - See Section [4.2](#) of this guide for details.
 - **SoundCloud**
 - Requires iFrame embed code
 - See Section [4.2](#) of this guide for details.
 - **Brightcove**: Requires the following
 - Media Host Account ID
 - Media Host Player ID
 - Media Host Clip ID
 - See Section [4.2](#) of this guide for details.
- **Duration**
- **Media Filename**
- **Format**
- **Type**

RIGHTS AND USAGE

- **Usage Statement**
- **Rights Statement**
- **Acknowledgement**

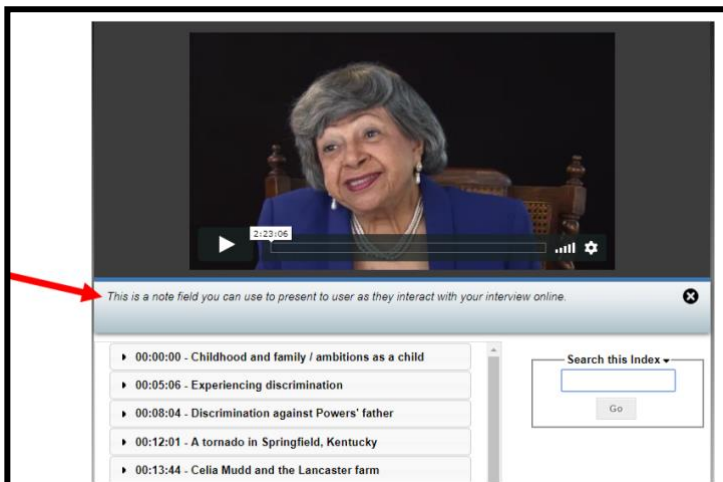
LANGUAGE

- **Language** – Required if indexing or synchronizing 2 languages
- **Include Translation** – This checkbox activates the capability for an interview to be indexed in 2 languages, as well as the capability to upload a transcript and a translation and synchronize both versions.
- **Language for Translation** – This designates the “translated” language in the bilingual viewer.

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).

- **Thesaurus (Keywords)**
- **Thesaurus (Subjects)**
- **Thesaurus (Titles)**



TRANSCRIPT

- **Transcript Sync Data** - Metadata created in OHMS after an interview transcript has been synchronized.
- **Transcript Sync Data (Translation)**

MISCELLANEOUS

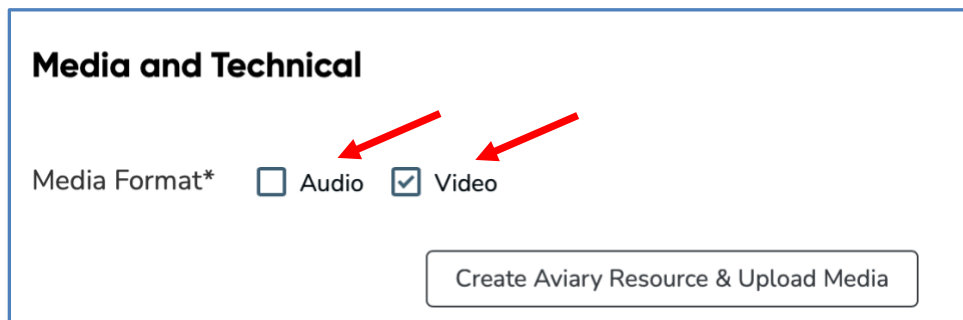
- **CMS Record ID**
- **Alt Sync URL** – [Legacy] This field was originally utilized when OHMS was only able to synchronize transcripts with audio, not video. This field was used to synchronize the audio exported from a video interview in order to synchronize. OHMS can now natively synchronize transcripts with video and, therefore, this field is no longer necessary for current OHMS functionality, however, it is being retained for backward compatibility.
- **OHMS XML filename**
- **Use Restriction**

- **User Notes**—This field can be used for notes that an institution wants communicated to the public user each time the viewer is opened. The message can be closed by clicking on the X in the right corner. The User Note will reappear each time the public user switches between the transcript and the index.

4.2 DIGITAL MEDIA HOST

OHMS is not a media repository or audio/video host. The audio or video files are not *uploaded* into OHMS. A record in OHMS must connect to the item either by a direct hyperlink or by adding pertinent streaming server information. The media host section of the metadata editor contains multiple fields, which enables 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**.

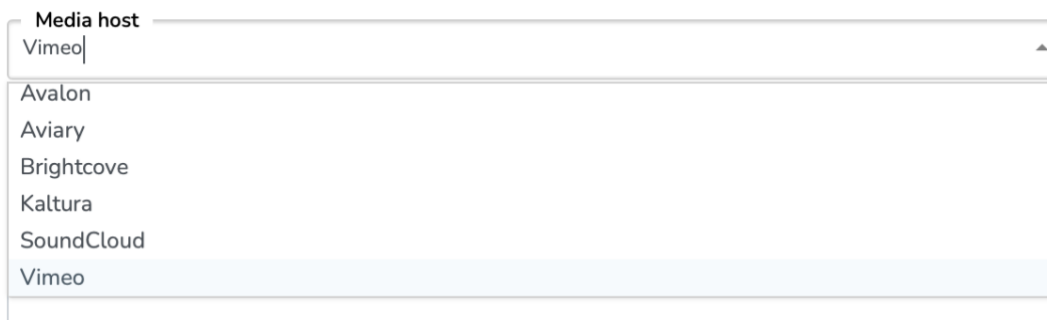


Media and Technical

Media Format* ☐ Audio ☒ Video

Create Aviary Resource & Upload Media

- Second, you must tell OHMS the **location** of the Audio or Video files by selecting your media delivery method from the dropdown menu.



Media host

Vimeo

Avalon

Aviary

Brightcove

Kaltura

SoundCloud

Vimeo

- If you are using direct linking (progressive download or HTML 5 delivery) to the media file located on a web server 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 be a direct link that ends with the audio or video file extension.

- If you are linking directly to a media file, you should be aware of transcoding/compression strategies for optimizing the performance of your data file.
- If you are using a streaming service, the OHMS Application and the OHMS Viewer must be programmed to integrate with that service in order to remotely control the streaming service's player. Currently, OHMS works with the following streaming services:
 - YouTube
 - Kaltura
 - Avalon
 - Brightcove
 - SoundCloud
- Once you select your streaming service, the Metadata Editor will provide you the fields required to integrate with that service.
 - 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, SoundCloud, Vimeo, or Avalon**, you must paste the iFrame embed code into the “**Kaltura/SoundCloud/Vimeo/Avalon iFrame Embed Code**” field.
 - If you are using **Avalon**:
 - Select Media Host = Avalon
 - If you know the direct URL for the Avalon media object, then use the Media URL field to store the value and save the record. This only works on some resources, e.g., https://pawpaw.dlib.indiana.edu/master_files/nv9352841/embed
 - If you know the embed code, then do not use the Media URL field, and instead use the "Kaltura/ SoundCloud/ Vimeo/ Avalon Embed Code" field.
 - Some embed codes use a direct URL in the code, e.g.,

```
iframe title=""Finding A History of the Black Man in Indiana" - OR 206"
src="https://media.dlib.indiana.edu/master\_files/n009w557j/embed"
width="600" height="50" frameborder="0" webkitallowfullscreen
mozallowfullscreen allowfullscreen></iframe>
```

In this case, simply add that to the field and save the record.

- Some embed codes use a PURL in the code, e.g.,

```
<iframe title=""Bustin' Loose: Breaking Racial Barriers in the Music Industry"
Lecture at Neal Marshall Black Culture Center"
src="https://purl.dlib.indiana.edu/iudl/media/j03c97mr7z?urlappend=%2Fembed
" width="600" height="337" frameborder="0" webkitallowfullscreen
mozallowfullscreen allowfullscreen></iframe>
```

In this case, you **MUST ALSO ADD** the "Avalon Target Domain" value, e.g., <https://media.dlib.indiana.edu> to the "Avalon Target Domain" field. This value **MUST** have http:// or https:// at the beginning of the string. So you will have added the embed code and the target domain and then you can save the record.

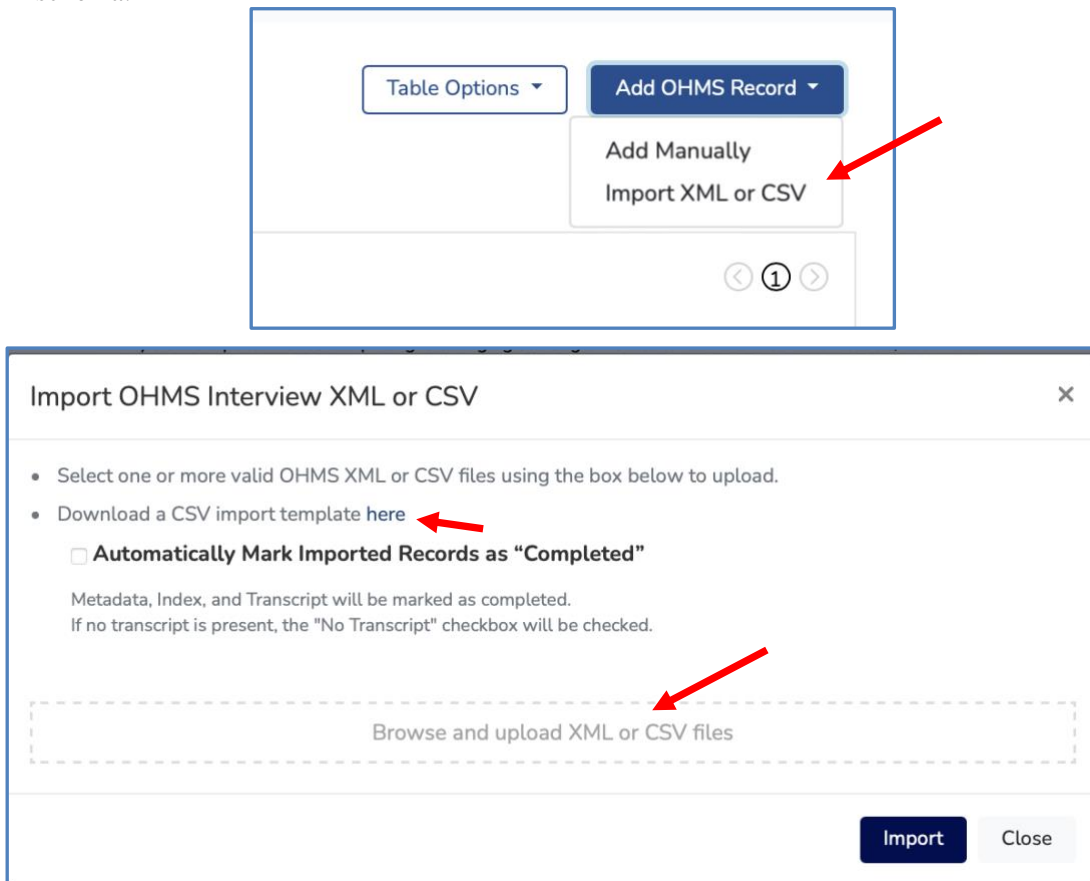
- If you are using **SoundCloud**, you must paste the iFrame embed code into the **"Kaltura/SoundCloud iFrame Embed Code"** field.
- If you are using **Vimeo** you must paste the iFrame embed code into the **"Kaltura/SoundCloud iFrame Embed Code"** field.
- If you are using **Kaltura** you must paste the iFrame embed code into the **"Kaltura/SoundCloud iFrame Embed Code"** field.
- If you are working with **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 **direct-linking** to an audio or video the OHMS player (OHMS Application and the OHMS Viewer) will work with .mp3, .m4a and .wav audio files as well as .m4v and .mp4 video files. The user experience will be dependent on users' internet connection, so we recommend that you explore formats and setting combinations that optimize performance in the HTML5, progressive download/non-streaming environment.

4.3 IMPORTING METADATA

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

Initial Import of Metadata:

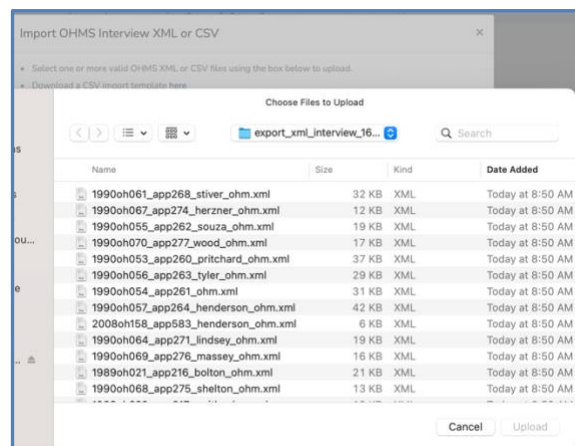
Initial import of metadata into OHMS can be accomplished utilizing both CSV and XML files. The CSV import feature is designed to function for batch import of records and migration of data and requires structuring data in accordance with the authorized OHMS CSV import template (available for download from the import window). Records can also be imported in the form of OHMS XML files in which the data was formerly exported from OHMS or it has been constructed in accordance with the OHMS XML schema.



* Batch XML files can be uploaded together.

Import Recommendation:

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*.

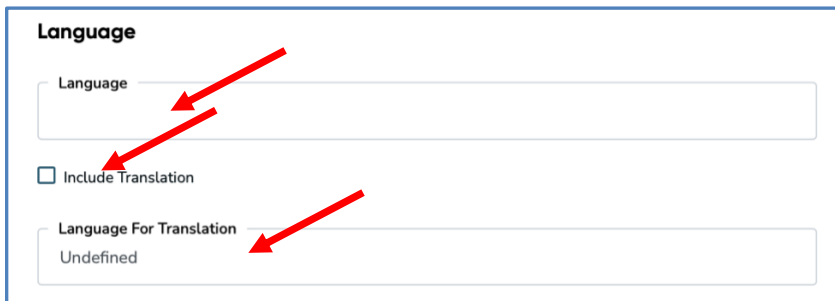


4.4 METADATA EDITOR: BI-LINGUAL INDEXING AND SYNCHRONIZATION

The OHMS Viewer has the capability for bi-lingual presentation of an index, as well as the capability to present a synchronized transcript and a synchronized translation.

In order to prepare to create a bi-lingual index and/or to synchronize a transcript and a translation you must:

1. Identify the primary language.
2. Check the “Include Translation” box.
3. Identify the secondary language for translation.



The screenshot shows a form titled "Language" with three main components: a "Language" text input field, an "Include Translation" checkbox, and a "Language For Translation" text input field. The "Language For Translation" field currently displays "Undefined". Three red arrows are overlaid on the form: one points to the "Language" input field, another points to the "Include Translation" checkbox, and a third points to the "Language For Translation" input field.

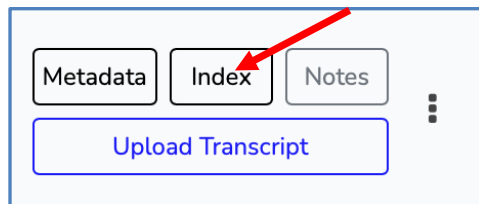
4.5 METADATA EDITOR: IMPORTANT NOTES

- **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 a streaming media host such as YouTube, Kaltura, Vimeo, Avalon, ,Brightcove, or SoundCloud, selecting this option provides the information necessary for OHMS to work with these streaming services. If using Avaolin, 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.)

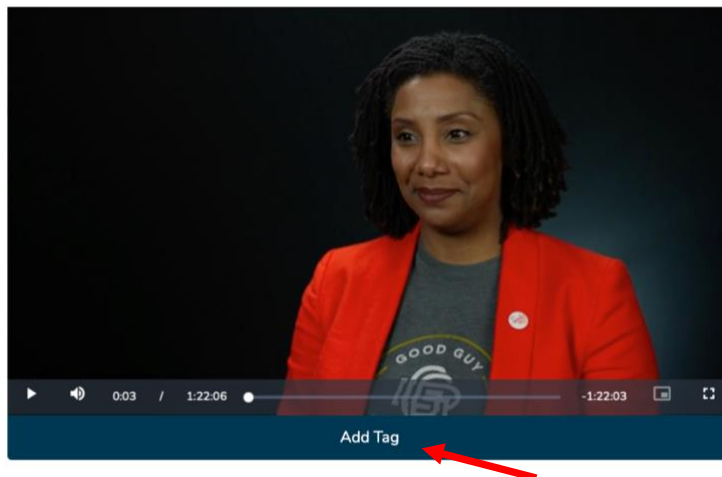
- **Use Restriction:** This field does not impact the OHMS Viewer but has been added as a field. Use of this field can serve to potentially flag restricted content prior to putting an OHMS XML file/interview online. This field is both importable and exportable in the OHMS XML and CSV files.
- **OHMS 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.
- **Collection/Series Links:** These fields are used to provide hyperlinks to users in order to navigate to an item's associated collection or series record. This allows users to return to an online finding aid or to an online catalog record from the OHMS Viewer.

5.0 INDEXING MODULE

The indexing module is deployed by clicking an item's "Index" button in the Interview Manager.



Activating the indexing module for the first time will present the player accompanied by the "Tag Now" button.



5.1: INDEXING CONTROLS AND WORKFLOW

- A segment is created when the “Tag Now” button is pressed in correlation to the corresponding moment in the audio or video. This is created by pressing the “**Tag Now**” button in the vicinity of the corresponding moment and then updating the time stamp more precisely in the segment creation window.
- When pressing “Tag Now” the indexer is presented with the segment creation window. This includes player controls and a series of empty descriptive fields.
- Depending on the browser’s autoplay specifications, the audio playback in the segment creation window may need to be un-muted.

Interview With Tracie Franklin, March 14, 2023

Tag Data

CollectionMetadataIndexNotes

Timestamp*

00:00:13

Update Time

⏮

⏪


▶

⏩

⏭

Cancel

Save



English

Segment Title* ⓘ

Segment Synopsis* ⓘ

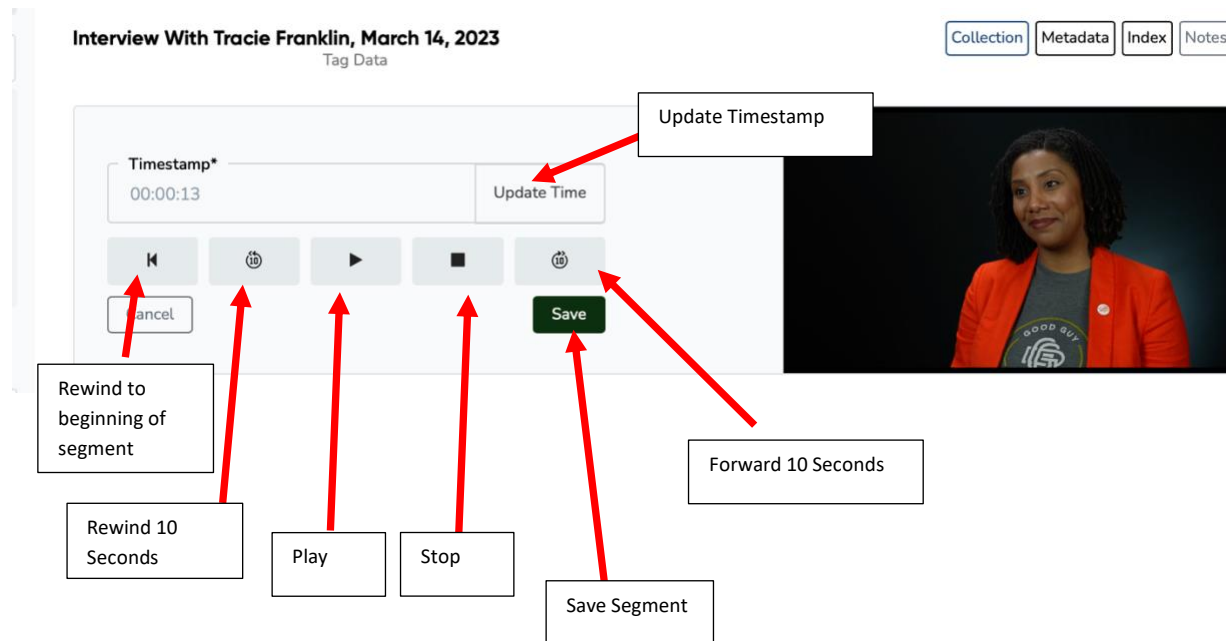
Partial Transcript

Keywords

Keywords should be separated by a semi-colon.

Subjects

The indexer can control the player within the tagging module. The player backtracks a few seconds each time the tagging module is activate



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

Time Stamp

A corresponding time stamp is created as soon as an indexer presses the “Tag Now” button. This time stamp may need to be adjusted for the segment to correlate to the intended moment.

Segment Title

Segment titles are required. The Segment titles function as chapter titles for the item’s index.

Partial Transcript

Utilized to include a partial transcript of the segment.

Keywords

Allows for multiple entries, separated by a semi-colon. This field can be used in conjunction with a thesaurus to control or suggest terms. (See section [6.0](#) of this guide for more information.)

Subjects

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.)

Segment Synopsis

The segment synopsis is designed to contain a descriptive summary of the segment.

GPS Coordinates

This field enables geo-referencing content which interfaces (for the public user) with Google Maps. Coordinates are entered in the format "XX.XXX, YY.YYY", where X is latitude (north or south) and Y is longitude (east or west). Note: There must be a space following the comma.

GPS Zoom

This dropdown field enables the indexer to determine a custom default zoom level presented to the public user within the OHMS Viewer. Choices include a scale ranging from 1 (world view) to 21 (street view). The default view is set at 17.

GPS Description

This field serves as a descriptive label for the specified GPS coordinates.

Hyperlink

This field allows a hyperlink to be present, connecting the segment to an external resource of any type. If the link is an image file, image will present to the public user in the form of a lightbox. Link to a webpage will open in a separate tab.

Link Description

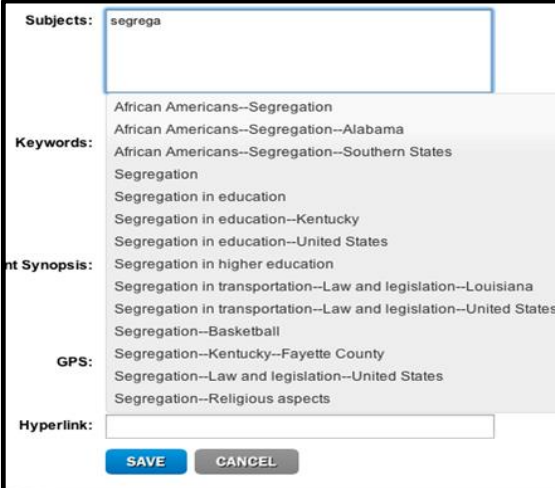
This field serves as a descriptive label for the specified hyperlink.

5.4 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 automatically dropped into the subjects field.

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



The screenshot shows a modal window with a search bar containing the text "segrega". Below the search bar, a list of suggestions is displayed, including "African Americans--Segregation", "African Americans--Segregation--Alabama", "African Americans--Segregation--Southern States", "Segregation", "Segregation in education", "Segregation in education--Kentucky", "Segregation in education--United States", "Segregation in higher education", "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". The "SAVE" button is highlighted in blue.

5.5 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](#).

The “Subject” thesaurus can utilize a “Linked” version of the Library of Congress Subject Headings or the Library of Congress American Folklife Center’s Ethnographic Thesaurus.

Thesaurus ⓘ



The screenshot shows a form with three dropdown menus. The first dropdown is labeled "Thesaurus (Keywords)" and has "Bourbon Keywords" selected. The second dropdown is labeled "Thesaurus (Subjects)" and has "LCSH" selected. The third dropdown is labeled "Thesaurus (Titles)" and has "Not Assigned" selected.

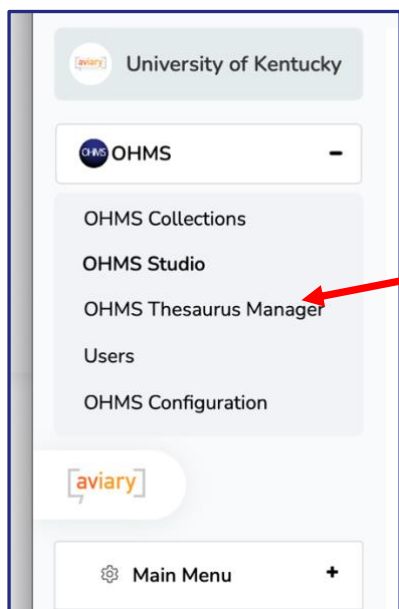
5.6 BI-LINGUAL INDEXING

As mentioned in section [4.5 \(BI-LINGUAL INDEXING AND SYNCHRONIZATION\)](#) you must indicate in the metadata record that you intend to utilize the bi-lingual functionality of OHMS. Once you have identified a primary and secondary language and you have checked the box “Include Translation,” the OHMS Indexing Module will present the indexer with two fields for each element instead of the default single field. The primary and secondary languages are listed at the top of each field.

5.6 NOTES ABOUT INDEXING INTERVIEWS

Indexing is an 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



To utilize a thesaurus and the controlled vocabulary functionality while indexing in OHMS, a thesaurus must be uploaded and linked to the record in the metadata utility. These thesauri contain terms that will be auto-suggested in the keyword and subject fields of the indexing module. This practice helps to manage consistency in titles and descriptive terms. Thesauri can be assigned for the following fields in the interview index:

- Title
- Subjects
- Keywords

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

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.

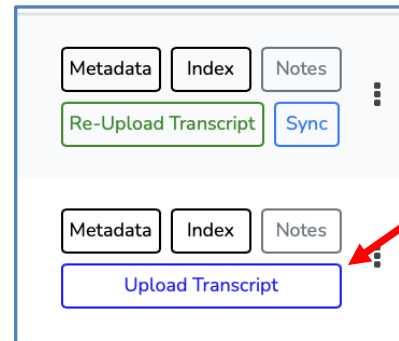
7.0 TRANSCRIPT SYNC MODULE

The purpose of the transcript sync module is to efficiently create time code references within an uploaded transcript. This will enable the linking of a public user's search of the text to the corresponding moments in the online audio/video interview. OHMS presents a user friendly, efficient method to drop time code into a transcript at regular intervals that include :30, 1, 2, 3, 4, and 5--minute intervals.

7.1 UPLOADING A TRANSCRIPT

In order for the “sync” function to be enabled, you must first upload the document. The transcript must be saved as a .docx, .doc, or .txt saved in Unicode UTF-8).

It is recommended that, prior to uploading, you format your transcript with **speaker identification followed by a colon with a line break between speakers.**



WARREN: What would be the next phase? Say, just, offhand saying your father representing one phase, you another. Can you predict a, another phase? Is that beginning to take shape already?

KING: Well, I think if there is a next phase it will be an extension of the present phase. My feeling is that we will really have to grapple with ways and means to really bring about an integrated society. Nonviolent direct action, working through the courts, and working through legislative processes may be extremely helpful in bringing about a desegregated society. But when we move into the realm of actual integration which deals with mutual acceptance, a genuine intergroup, interpersonal living, then it seems to me that other methods will have to be used. And I think that the next phase will be the phase that really grapples with the--the methods that must be used to bring about a thoroughly integrated society.

7.2 TRANSCRIPT TIME CODE AND AUTO-SYNCHRONIZATION

OHMS will automatically recognize timecode embedded in a transcript and will auto-synchronize the transcript. If the uploaded transcript contains timecode that conforms to OHMS intervals (00:00:30, 00:01:00, 00:02:00, 00:03:00, 00:04:00, and 00:05:00), there will be no need to manually synchronize the transcript. Timecode in the transcript must be formatted [HH:MM:SS] and be placed at the location of the corresponding text.

The following is a sample:

BEAM: --during Prohibition. Then, [00:02:00] when Prohibition was over, uh, he, my grandfather, Park Beam, had been a distiller, of course, all his life. And he was working with Jim down here to get this distillery started

To upload a transcript, there will be a prompt to:

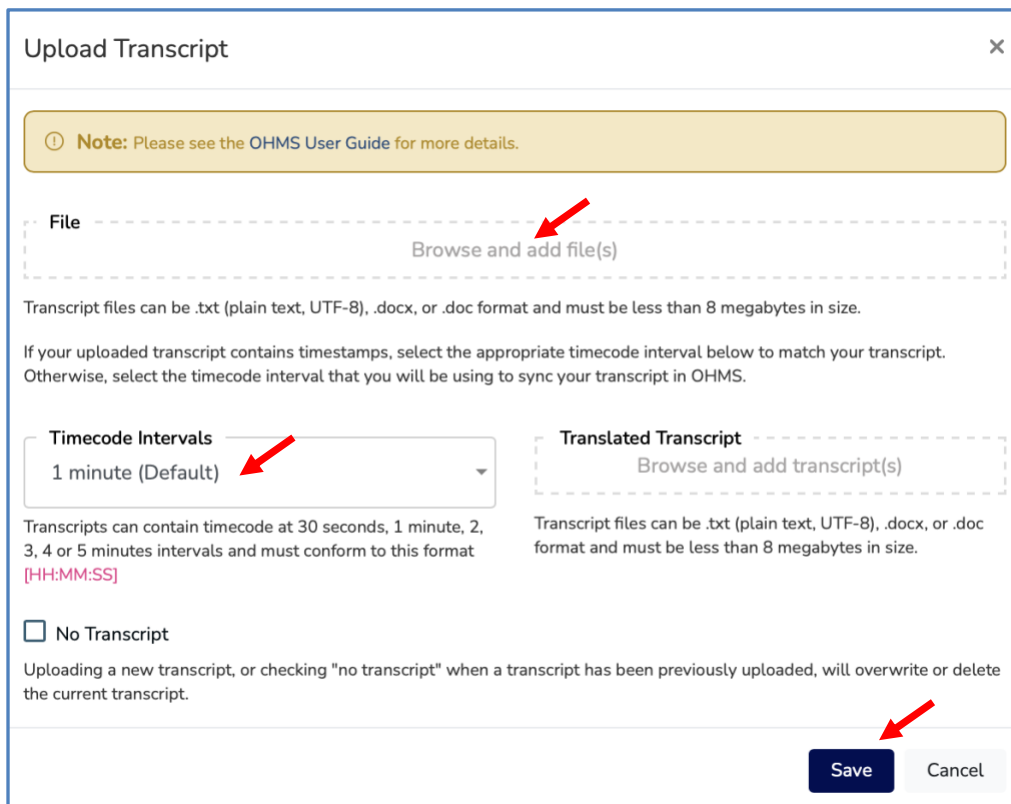
1. Add the document file.
2. Select the desired timecode interval. If your uploaded transcript contains OHMS-compliant time-stamps (00:00:30, 00:01:00, 00:02:00, 00:03:00, 00:04:00, and 00:05:00 formatted [HH:MM:SS]), you must identify the existing interval. If the uploaded transcript contains OHMS-compliant timestamps, the document will be automatically synchronized.

If there is no time-codes in the uploaded transcript, identify the desired timecode interval upon upload.

3. Upload a translation if a record has been marked as bilingual in the OHMS metadata.
4. If a record will not have a transcript, clicking “No Transcript” will ignore the transcript synchronization aspects in the workflow progress calculation ([See Section 9.0](#)).

If there is an existing transcript, and “No Transcript” is checked, the existing transcript will be overwritten and deleted.

5. Save.



Upload Transcript [X]

Note: Please see the [OHMS User Guide](#) for more details.

File
Browse and add file(s)

Transcript files can be .txt (plain text, UTF-8), .docx, or .doc format and must be less than 8 megabytes in size.

If your uploaded transcript contains timestamps, select the appropriate timecode interval below to match your transcript. Otherwise, select the timecode interval that you will be using to sync your transcript in OHMS.

Timecode Intervals
1 minute (Default)

Transcripts can contain timecode at 30 seconds, 1 minute, 2, 3, 4 or 5 minutes intervals and must conform to this format [HH:MM:SS]

Translated Transcript
Browse and add transcript(s)

Transcript files can be .txt (plain text, UTF-8), .docx, or .doc format and must be less than 8 megabytes in size.

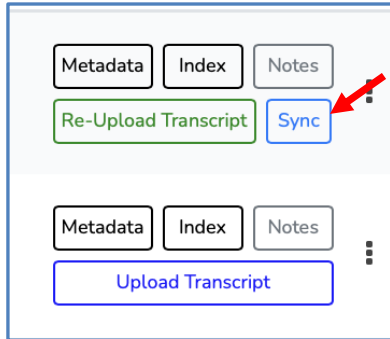
☐ No Transcript

Uploading a new transcript, or checking "no transcript" when a transcript has been previously uploaded, will overwrite or delete the current transcript.

Save **Cancel**

7.3 INITIATING TRANSCRIPT SYNCHRONIZATION

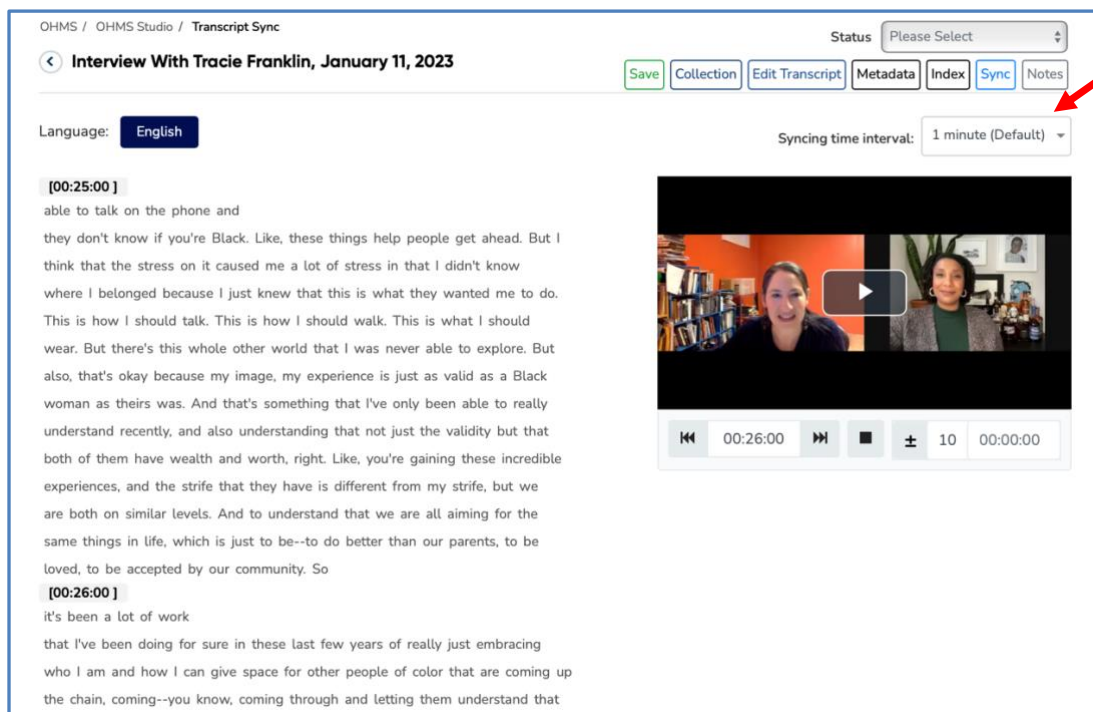
Once you have uploaded a transcript, you can begin the sync process. The “Sync” action button in the OHMS Studio record will indicate an interview’s eligibility for the transcript sync process.



- “Sync”: The “Sync” action button appears when the transcript has been successfully uploaded. To initiate the transcript sync process, click “Sync”. This will open the transcript sync utility.

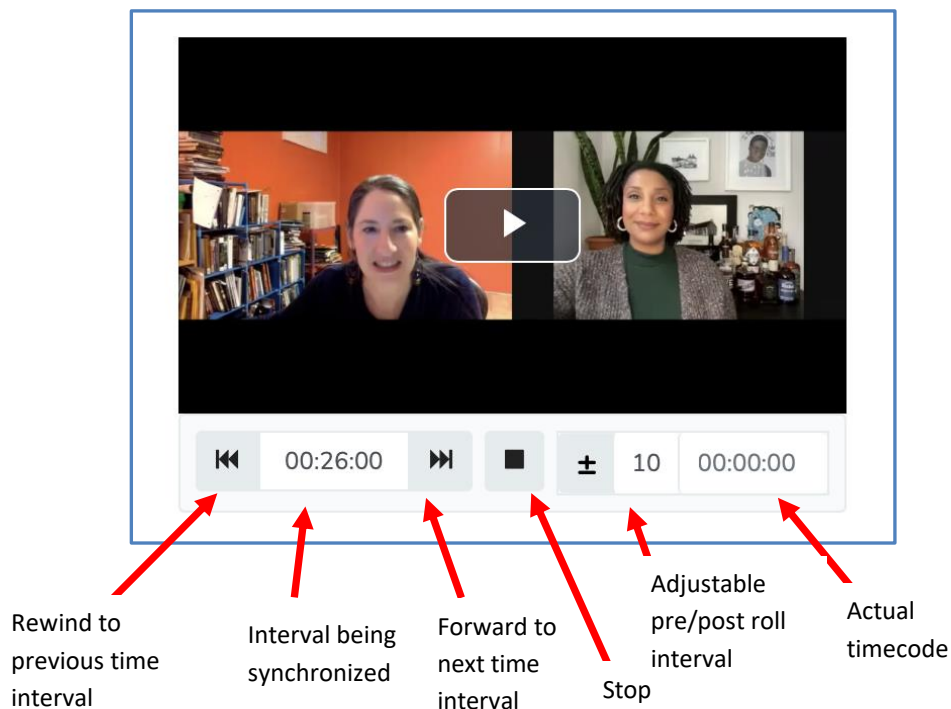
7.4 SYNCHRONIZING A TRANSCRIPT

In preparation for synchronizing a transcript, you must select a sync-interval in the dropdown menu situated above the player. This will determine the sync-interval duration during the synchronization process as well as the sync-interval duration when the transcript is presented publicly in your OHMS viewer.



By design, the OHMS transcript sync module enables you to expedite the synchronization workflow by focusing on the seconds preceding the placement of the time-sync marker (which varies depending on the selected interval). This “lead-time” is intended to facilitate the location of the text that corresponds to the audio or video moment in preparation of placing the time marker. The default lead-time is 10 seconds. You can shorten or lengthen this lead time by changing the lead-time next to the clock

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

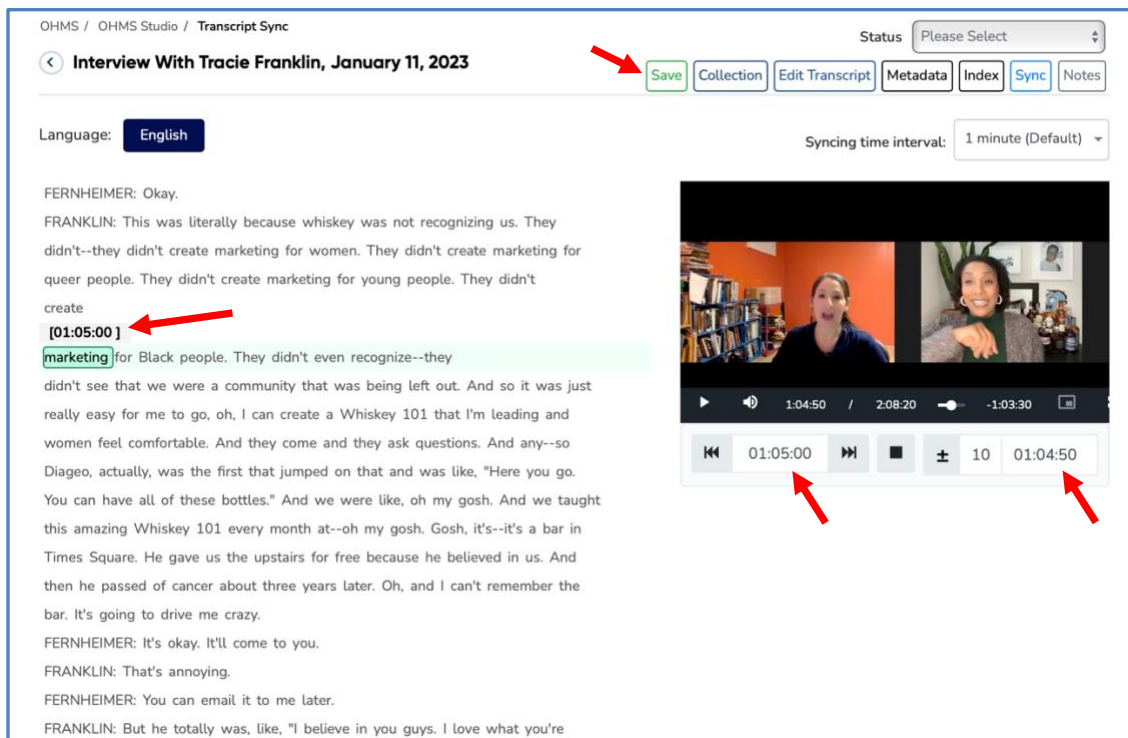


- 2) Click the forward button, you will be taken to the next location depending on the interval you have chosen.
- 3) You will hear two chimes. Your first chime (lower pitched) is a warning, indicating that you have ten seconds (or otherwise specified lead-time) to locate the corresponding section of 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.

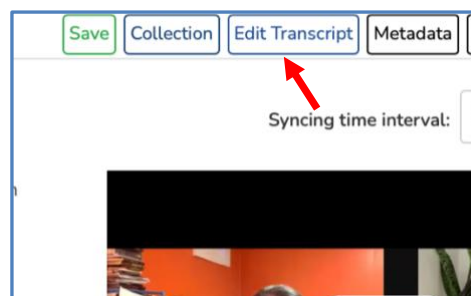
- 7) You can adjust the sync point by rewinding back or forwarding to the appropriate segment. This is indicated by the clock and the minute-interval counter. Then you can correct your sync placement when the bell rings on the minute.

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. It is strongly recommended that you save your work periodically during the synchronization process.



7.5 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.

7.6 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.

7.7 TRANSCRIPT SYNC: LINKABLE FOOTNOTES

The OHMS Application and the OHMS Viewer respond to linkable footnotes placed in the document. These footnotes can contain text as well as hyperlinks. The OHMS utilizes BBCode in order to create linkable endnotes. This BBCode must be placed in the .txt document that is uploaded to the OHMS Application.

In order to implement linkable footnotes, utilize double brackets `[[text]]` in the text of the transcript

`[[footnote]]1[[/footnote]]`

`[[footnote]]2[[/footnote]]`

The following is the footnote code placed at the end of your document for a standard note containing text, followed by a note containing text and a hyperlink:

`[[footnotes]]`

`[[note]]Sample Text[[/note]]`

`[[note]] Sample Text[[link]]http://www.oralhistoryonline.org[[/link]][[/note]]`

`[[/footnotes]]`

The following is an example:

Footnote Coding in Transcript Text:

This old bunch, it's a, and two of my best buddies was Booker Noe`[[footnote]]1[[/footnote]]`. and Elmer T. Lee`[[footnote]]2[[/footnote]]` `[[footnote]]3[[/footnote]]`, which we just lost--(laughs)--Elmer T. and Booker But us three would get together--(laughs)--it was a lot of fun in that day and time. We enjoyed being with each other and had a great time doing it.

Footnote Coding at End of Transcript:

`[[footnotes]]`

[[note]]Frederick "Booker" Noe II was the Master Distiller at Jim Beam Distillery and was the grandson of Jim Beam. Booker Noe passed away in 2004.[[/note]]

[[note]]Elmer T. Lee was the Master Distiller at Buffalo Trace Distillery. Lee passed away in 2013.[[/note]]

[[note]]Nunn Center Interview with Elmer T. Lee, October 30, 2008, Buffalo Trace Distillery Oral History Project. [[link]]<https://kentuckyoralhistory.org/ark:/16417/xt708k74tx0z#tab-2>[[/link]] [[/note]]

[[/footnotes]]

7.8 SYNCHRONIZING A TRANSCRIPT AND A TRANSLATION

If you intend to synchronize both a transcript and a translation, you will be prompted to do so in the transcript upload dialogue box.

Upload Transcript

Note: Please see the OHMS User Guide for more details.

File

Browse and add file(s)

Transcript files can be .txt (plain text, UTF-8), .docx, or .doc format and must be less than 8 megabytes in size.

If your uploaded transcript contains timestamps, select the appropriate timecode interval below to match your transcript. Otherwise, select the timecode interval that you will be using to sync your transcript in OHMS.

Timecode Intervals

1 minute (Default)

Transcripts can contain timecode at 30 seconds, 1 minute, 2, 3, 4 or 5 minutes intervals and must conform to this format [HH:MM:SS]

Translated Transcript

Browse and add transcript(s)

Transcript files can be .txt (plain text, UTF-8), .docx, or .doc format and must be less than 8 megabytes in size.

☐ No Transcript

Uploading a new transcript, or checking "no transcript" when a transcript has been previously uploaded, will overwrite or delete the current transcript.

Save Cancel

Following upload, you will be ready to synchronize.

If you upload a transcript and a translation, you will need to synchronize both separately. You will synchronize each the same way you would synchronize a single transcript. Press "Save" when you complete the synchronization of the primary language. Then select the translation button and repeat the process.



8.0 THE OHMS STUDIO “NOTES” FEATURE

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.

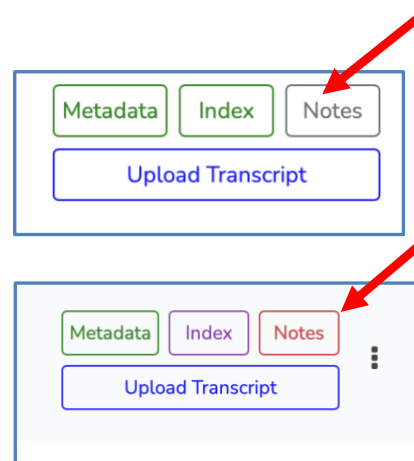
Organization Owners and Admins can click on the notes action button to read the note and mark it "Resolved" when the issue has been addressed. If a note is unresolved, the "Notes" indicator in the OHMS Studio will remain red.

When all notes are resolved, the action button in the OHMS Studio will turn green.

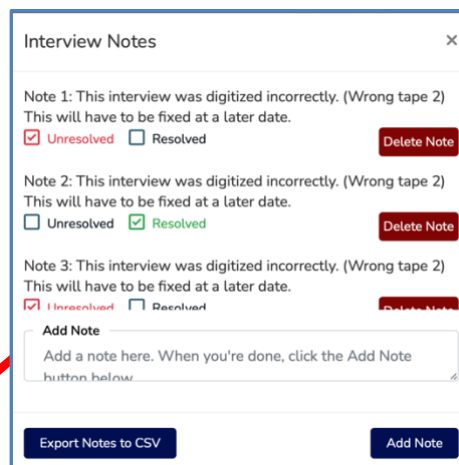
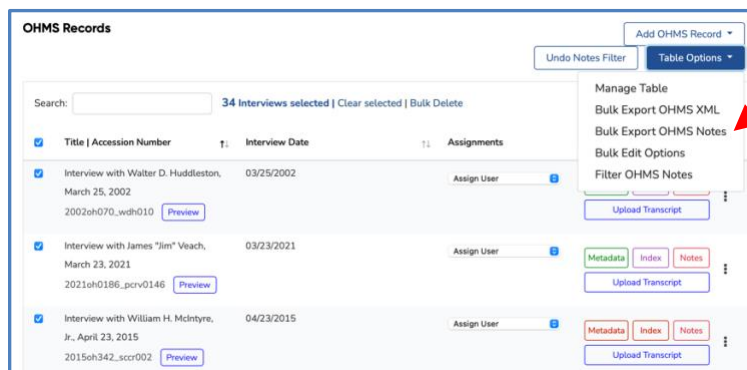
Gray Notes Action Button: No Notes associated with record

Red Notes Action Button: There is an unresolved note associated with the record.

Green Notes Action Button: There are resolved notes associated with the record.



- In the notes creation window, you resolve notes, delete notes, or export notes as a .csv.
- Notes can be exported using the bulk export feature in “Table Options.”

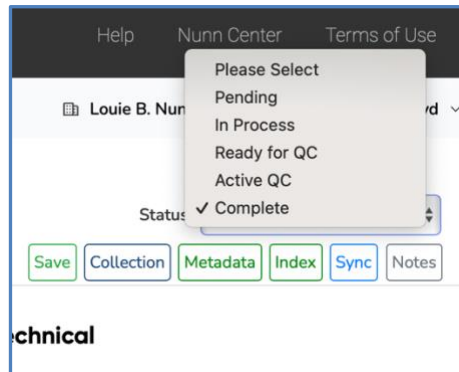


9.0 WORKFLOW MANAGEMENT

The OHMS Studio has a workflow management component to demonstrate the processing and quality control status as well as an overall status update. This feature can be used 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. Workflow status can be marked for each of the major OHMS functions including the Metadata, Indexing, and Transcript Sync utilities.

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. Upon creation of the record pending a status change, the record will present black. A change of status will change the color accordingly:

- No Status: black
- “Pending”: blue
- "In Process": darker 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 Alva Childers, August 22, 1987 1987oh199_app122	08/22/1987	Assign User	Metadata	Index	Notes	...
				Upload Transcript			
<input type="checkbox"/>	Interview with Alvin C. Poweleit, 2004oh090_ww331	none	Assign User	Metadata	Index	Notes	...
				Upload Transcript			
<input type="checkbox"/>	Interview with Alvin C. Poweleit, June 1, 1985 1985OH120 WW 015	06/01/1985	Assign User	Metadata	Index	Notes	...
				Re-Upload Transcript	Sync		
<input type="checkbox"/>	Interview with Alvin L. Martin, March 15, 2003 2012OH135 OCHS 037	03/15/2003	Assign User	Metadata	Index	Notes	...
				Upload Transcript			

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.

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.

The image displays two screenshots from the OHMS application. The left screenshot shows the 'OHMS Records' interface, which includes a search bar and a table of records. A red arrow points to the 'Preview' button for the record 'Interview with Abigail Unuakhalu, November 11, 2015, 2015OH485 AITB 027'. The right screenshot shows the 'OHMS Preview Viewer' interface for the selected interview. It features a video player with a photo of Joseph Tyler Gayheart, a list of interview topics with timestamps, and a search bar for the index.

OHMS Records

Search:

<input type="checkbox"/>	Title Accession Number	Collection Name
<input type="checkbox"/>	Interview with Abigail Unuakhalu, November 11, 2015, 2015OH485 AITB 027	African Immigrants History Project
<input type="checkbox"/>	Interview with Abraham Swen-Peters, November 2, 2015, 2015OH484 AITB 026	African Immigrants History Project

OHMS Preview Viewer

Interview with Joseph Tyler Gayheart, June 11, 2010

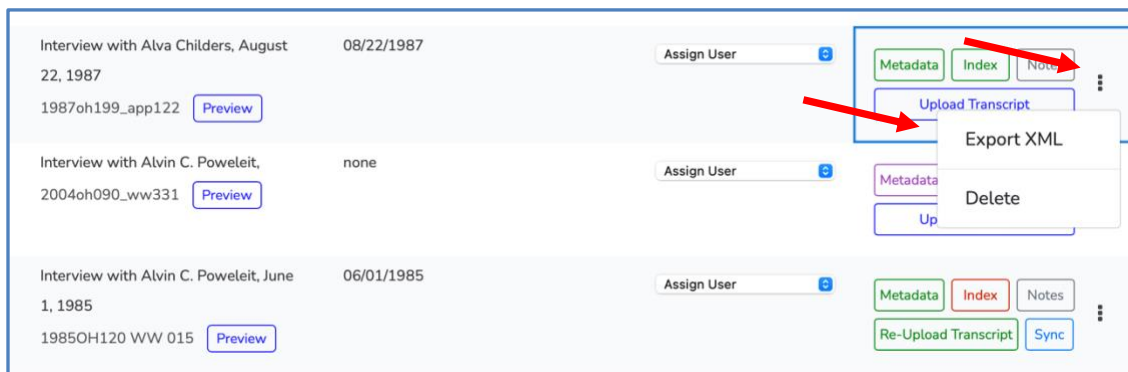
Louis B. Nunn Center for Oral History, University of Kentucky Libraries
Col. Arthur L. Kelly American Overseas Oral History Collection, From Combat to Kentucky
Ian Jennings Abney, Interviewer | 2010OH057 WW 368

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 Afghans
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

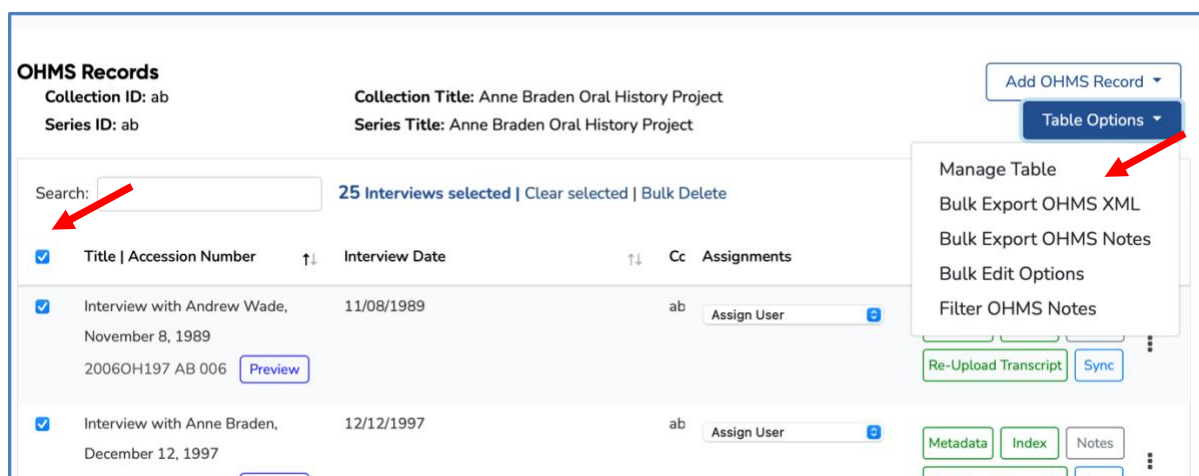
When you are satisfied with the interview's level of processing, the XML file must be exported for use with the OHMS Viewer. Upon clicking the “XML” export link, an XML document will be created and downloaded with a filename derived from the “OHMS XML filename” field in the interview. If no filename 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.



In addition to the Bulk Export XML feature in the table options, OHMS XML can be bulk exported from the collections page as well.

<input type="checkbox"/>	African American Community in Hopkinsville (KY)...	aahop	aahop	10	0	0	Manage Interviews Export Interviews
<input type="checkbox"/>	Stories of Asian Americans and Pacific Islanders in...	aapi	aapi	11	0	0	Manage Interviews Export Interviews

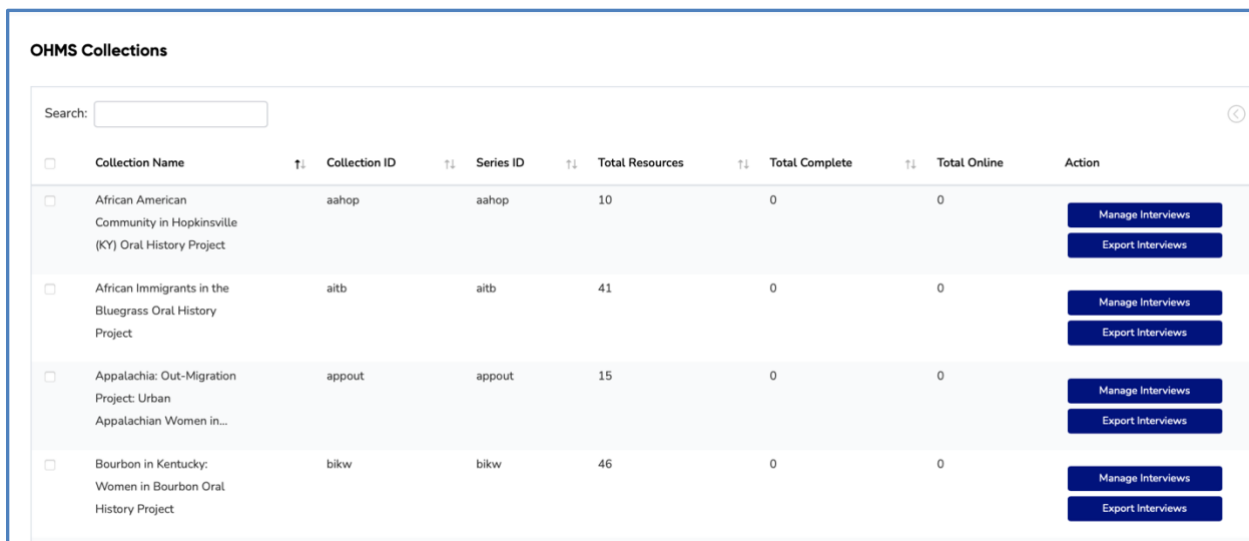
11.1 EXPORTING A CSV VERSION OF YOUR DATA

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).

12.0 OHMS COLLECTIONS

The OHMS Collections feature automatically creates groupings of records based on data pertaining to collections ID and the series ID in the metadata records.



<input type="checkbox"/>	Collection Name	Collection ID	Series ID	Total Resources	Total Complete	Total Online	Action
<input type="checkbox"/>	African American Community in Hopkinsville (KY) Oral History Project	aahop	aahop	10	0	0	Manage Interviews Export Interviews
<input type="checkbox"/>	African Immigrants in the Bluegrass Oral History Project	aitb	aitb	41	0	0	Manage Interviews Export Interviews
<input type="checkbox"/>	Appalachia: Out-Migration Project: Urban Appalachian Women in...	appout	appout	15	0	0	Manage Interviews Export Interviews
<input type="checkbox"/>	Bourbon in Kentucky: Women in Bourbon Oral History Project	bikw	bikw	46	0	0	Manage Interviews Export Interviews

13. ASSIGNING INTERVIEWS TO SPECIFIC USERS

OHMS Organization Owners and Administrators can assign interviews to individuals in the “OHMS Assigned User” role. When an interview is assigned to an individual, the designated OHMS Assigned User can only view and work on interviews assigned to them.

In the User Management record for a particular User or Editor, an OHMS Organization Owner or Admin can view interviews assigned to that users, as well as view the status of progress, date assigned, and the current assignment status.

14.0 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

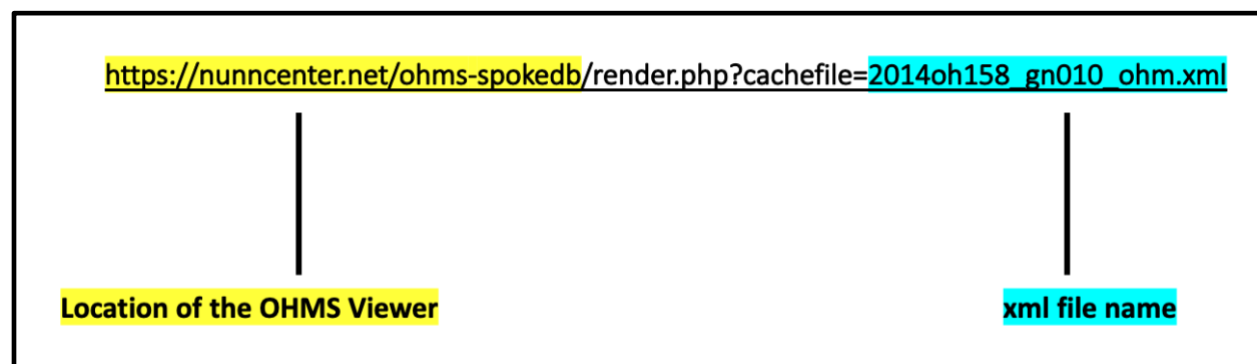
14.1 INSTALLING AND CONFIGURING THE OHMS VIEWER

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.

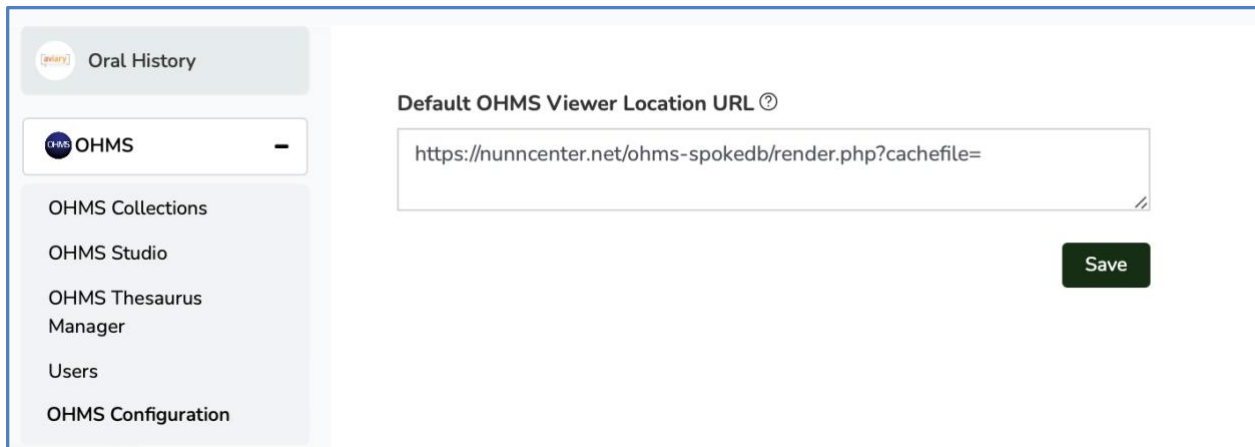
14.2 LINKING TO YOUR OHMS XML FILE

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.



The screenshot shows the OHMS configuration interface. On the left is a sidebar with the 'Oral History' logo and a menu containing 'OHMS', 'OHMS Collections', 'OHMS Studio', 'OHMS Thesaurus Manager', 'Users', and 'OHMS Configuration'. The main area is titled 'Default OHMS Viewer Location URL' with a help icon. It features a text input field containing the URL 'https://nunncenter.net/ohms-spokedb/render.php?cachefile=' and a green 'Save' button.

14.3 UPGRADING YOUR OHMS VIEWER

- Make offline copy of:
 - config.ini file located in the *config* subdirectory.
 - cachefile 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 *cachefiles* subdirectory into the root of the new viewer directory.

Note: the new viewer does not contain a config.ini or a cachefiles 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.

15.0 REMINDERS

- The OHMS transcript sync and indexing utilities 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.