

## Building Your First Collection

This tutorial leads you through the process of adding items to your first CONTENTdm collection with the Project Client. To successfully complete this section:

- The CONTENTdm server must be running.
- The Project Client must be installed on your desktop computer.
- You have set up a collection and are ready to begin adding items into the collection.

This guide is intended to provide a quick start for your collection building with the Project Client. You can also add new items with the CONTENTdm Web interface, which is detailed in **Adding Items**. Additional assistance in using specific CONTENTdm features is available in the **Help files**.

### Learn About:

- Section I:     Creating a Project**
- Section II:    Editing Project Settings**
- Section III:   Adding Items to a Project**
  - Adding an Item**
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## Section I: Creating a Project

The Project Client enables you to create and work with projects. When you add items to the Project Client and edit metadata using the Project Spreadsheet and other tools, items are saved as a part of the project. A project also reflects a group of **Project Client settings** associated with a collection on a CONTENTdm Server. These settings and the Project Client interface make it efficient to add items and metadata to your collection.

Projects are workspaces where you will add items and descriptive metadata before you add them to a collection. Once an item is in a project, it will remain in your project until it is uploaded. Opening and closing a project does not affect the items within the project.

When you upload items for approval from the Project Client your items are sent to a pending queue for review by a CONTENTdm Administrator who then adds approved items to a collection.

Before you begin, the Project Client software must be installed on your workstation. You will need the following information from your CONTENTdm Administrator:

- URL address of the CONTENTdm server
- your user name and password

The New Project wizard in the Project Client guides you through creating a project. This section explains each dialog in the wizard.

**To create a new project:**

1. From the Project Client Home tab, click **Create New Project**. The New Project wizard displays. Enter the CONTENTdm Server URL which can begin with either http or https protocols. Then enter your user name and password. Click **Next**.

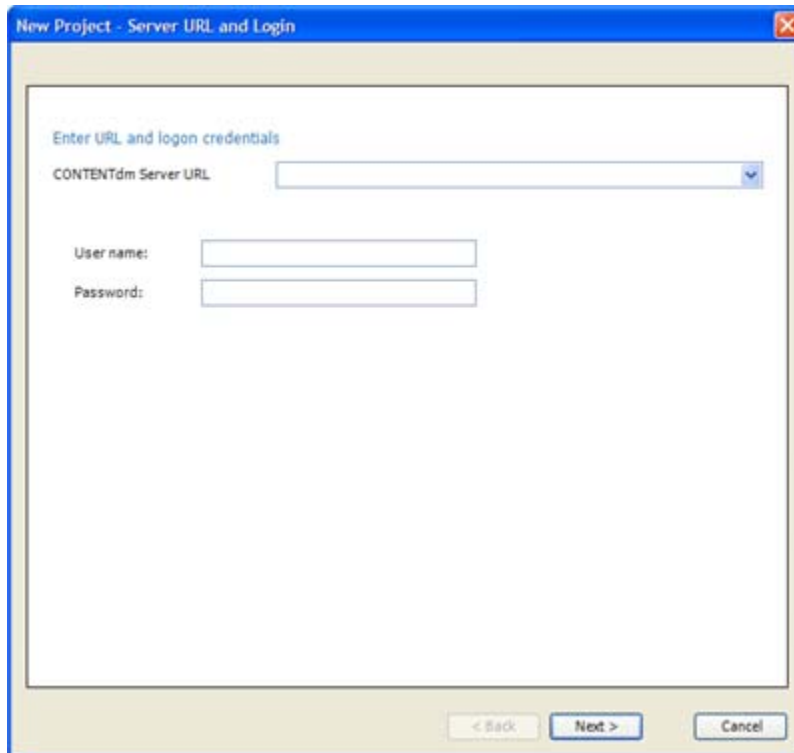
The image shows a software dialog box titled "New Project - Server URL and Login". The dialog has a light beige background and a blue title bar with a close button in the top right corner. The main content area contains the text "Enter URL and logon credentials" in blue. Below this, there is a dropdown menu labeled "CONTENTdm Server URL". Underneath the dropdown are two text input fields: "User name:" and "Password:". At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel".

Figure 1. New Project URL and Login

2. Click the dropdown list to view the existing collections on the server. Select the collection where you will upload items. When you upload items from your project to the collection, they will always go into the pending queue of the specified collection to await approval by the collection administrator. Click **Next**.

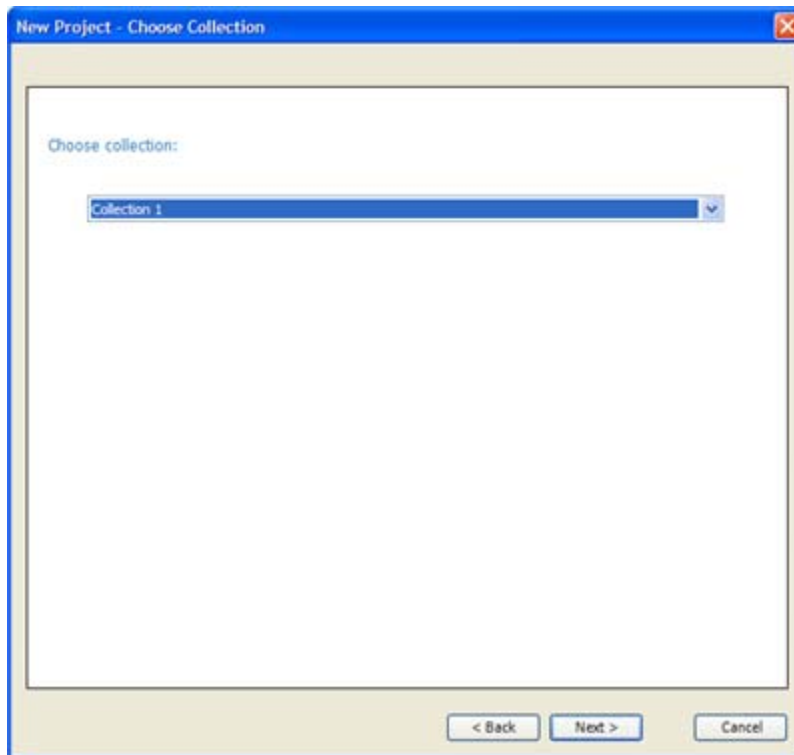


Figure 2. Choose Collection

3. Name your project or review the name provided. Project names should not exceed 128 characters (including spaces) and alphanumeric characters should be used. Project names are used within the Project Client to help you organize your work; they are not displayed to end users. Click **Finish**.

To make a project available to other Project Client users, check **Share this project on a network with other users**. If you plan to share a project, be sure to use a unique name since other users cannot import any project that uses the same name as one of their existing projects. Click **Browse** to locate or create a shared location that is accessible to other users. Click **Finish**. If different users need to have slightly different project settings to work with the same collection or need to work simultaneously, set up separate projects instead of sharing.

When you create a shared project, the project settings and the items you add to the project are saved to the shared location you specify so others can also work in the project.

Only one user at a time can work with a shared project. If you opt to share your project, remember that deleting items or changing settings affects all users who share the project. If you delete a shared project from your Project Client, it remains available to other Project Client users at the shared network location. To completely delete a shared project, the project directory must be deleted from the shared network location.

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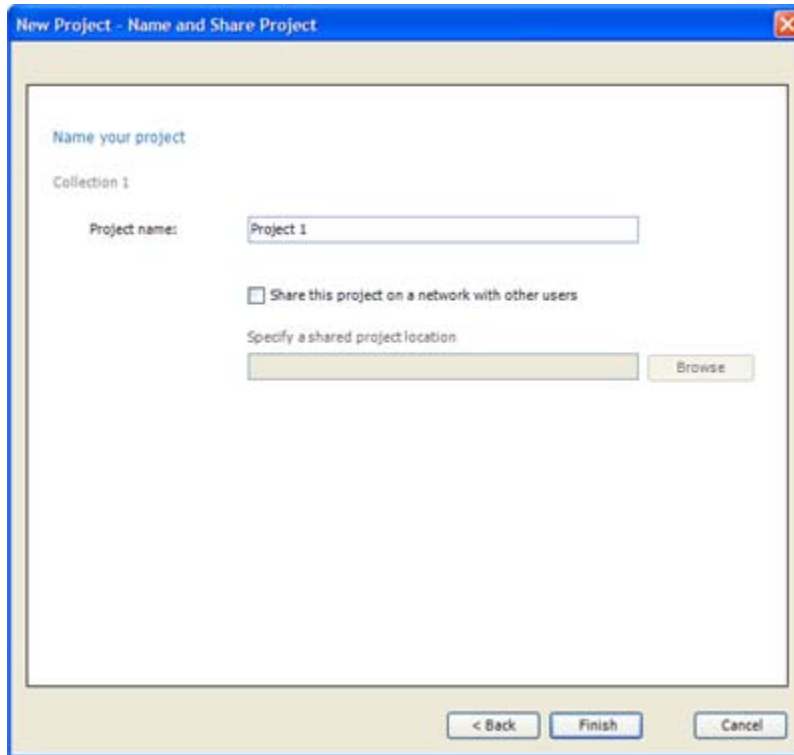


Figure 3. Naming and Sharing

4. Once you have successfully created a project, the Project Client Home tab displays and you can begin adding items to your project.

In the example shown below the Collection name is displayed in the left task pane as Collection 1 and the project name, Project 1 appears below it. Next to the project name, an icon showing two figures indicates that this project is shared.

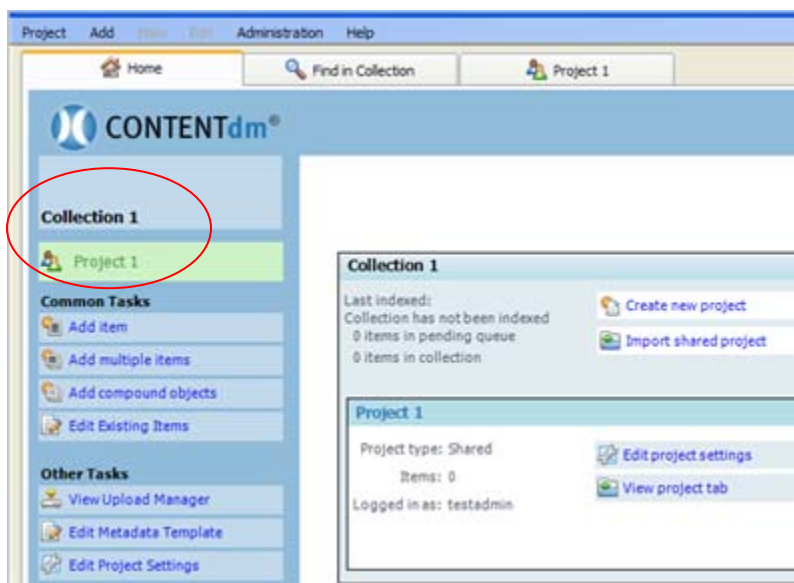


Figure 4. Home tab with Collection and Project Name

## Section II: Editing Project Settings

Once your new project is created you can establish or review your project settings in the Project Setting Manager before you begin adding items. The Project Settings Manager is a centralized interface for viewing and editing many project settings that can make working in the Project Client more efficient.

Default project settings match collection configuration and server settings in CONTENTdm Administration. As you work in the Project Client, the project-level settings that you save in the Project Settings Manager will override the default settings.

Some settings are established at the collection level by the server or collection administrator and can be viewed but not changed in the Project Settings Manager.

Use the **Metadata Templates** in the Project Settings Manager to establish a metadata template before you add items to the project.

### To edit project settings:

1. From the Home tab or the Project tab, in the left task pane under **Other Tasks**, click **Edit Project Settings** or from the Project menu, click **Project Settings Manager** and navigate to the page you need.

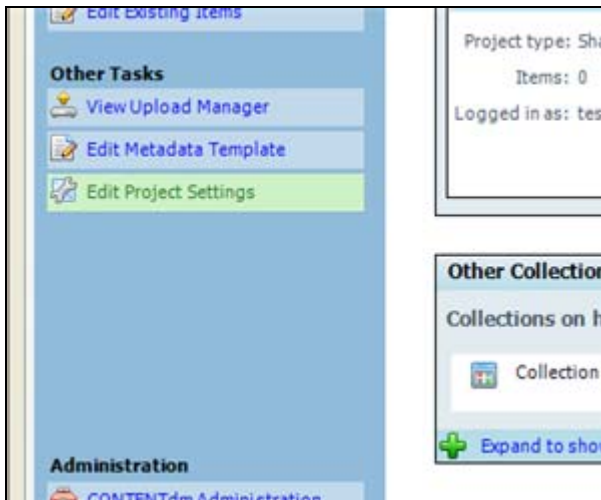


Figure 5. Edit Project Settings

For more information on establishing or editing your project settings, see **About Project Settings**.

## Section III: Adding Items to a Project

When you add items to your project, you can enter or edit metadata then upload items to the CONTENTdm server for approval before they are added to your collection.

Items can be added to your project from any of the following

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- Home tab
- Project tab or
- Add menu.

On the Home or Project tabs use the left task pane options under **Common Tasks** to add items (images, compound objects, audio or video files) to your project.

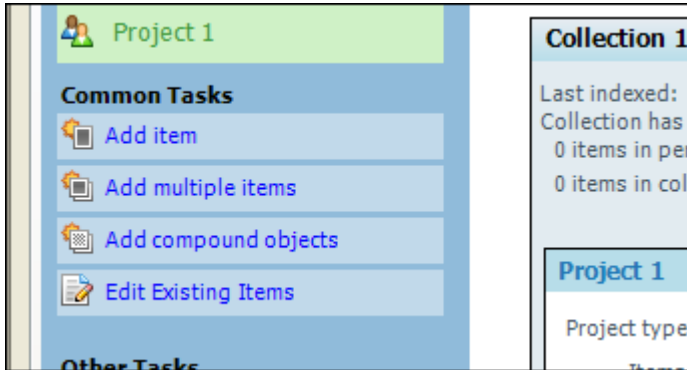


Figure 6. Adding Items

The Add menu includes additional, less common, items (finding aid and URL) to add to your project.

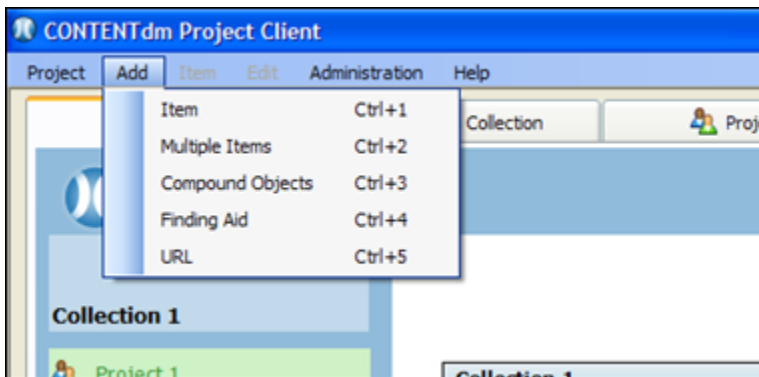


Figure 7. Add Menu

## Adding an Item

To add an item, select the specific file to add into the project spreadsheet. CONTENTdm adds a copy of the item to the project, and in the process creates a thumbnail image, or uses a custom thumbnail image that you create, or uses a default thumbnail image for each file, depending on your settings.

Once you have added a file into the project spreadsheet, you can edit or add metadata for that file.

### To add an item:

2. On the Home or Project tabs, click **Add Item** from the left task pane or from the Add menu select **Item**. The Add Item wizard opens.

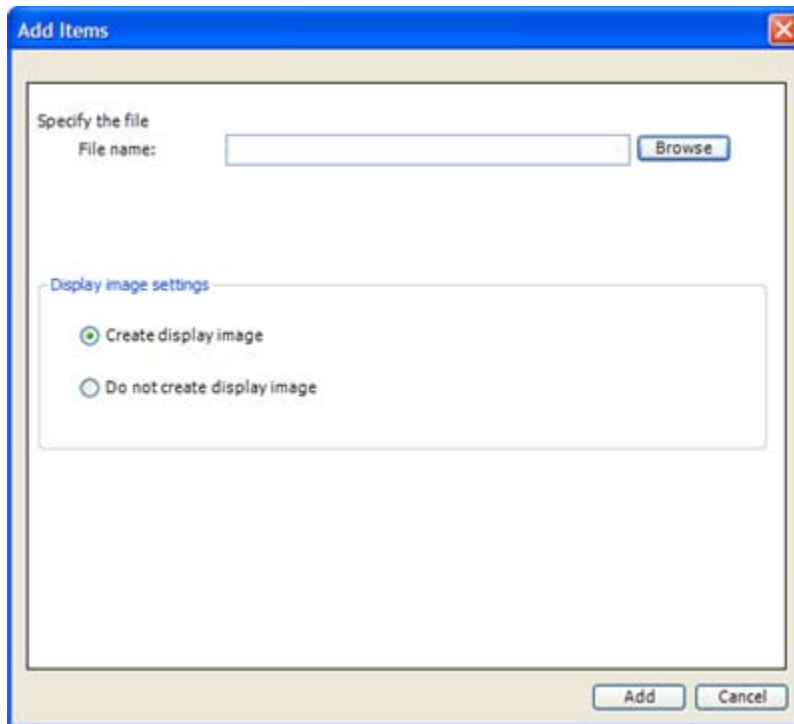


Figure 8. Add an Item

3. To locate the item you want to add, click **Browse**.
  - Select the item you want add or
  - Select multiple items to add from a single directory by pressing CTRL and clicking additional items.
4. Click **Open**. The browse screen closes and the file path and name of the selected item are displayed in the Add Items wizard.

Specify whether CONTENTdm should create a display image. You can specify the display image format in the Project Settings Manager by editing the **Images & Thumbnails settings**. (If your collection administrator has enabled **Archival File Manager**, this screen will have a different appearance from the one shown above.)

Creating display images is useful when you are working with high-resolution images which are very large and minimally (or un-) compressed. CONTENTdm can create display-quality versions of images when you add high-resolution files, minimizing file download time for end-users and eliminating the need to store these large, uncompressed high resolution files on your CONTENTdm server.

5. Click **Add**. A progress screen displays as the item is added. A summary screen displays when the addition is complete.
6. Click **Close** to close the summary screen. The item is displayed in the project spreadsheet. Enter metadata in the project spreadsheet or click the item thumbnail to open the Item Edit tab.

## Adding a URL

Adding a URL allows you to add a Web site to your project spreadsheet. This function is often used to manage metadata describing streaming media. It also allows you to add metadata for Web sites. A system default thumbnail is used for URLs if you choose not to create custom thumbnail images for these file types.

This function can also be used to add a null item—that is, a metadata record with no associated digital file. Adding a null item is useful in cases where item metadata is ready to be added to your project, but the digital item is not available.

**To add a URL or null item:**

1. From the Add menu, click **URL**.

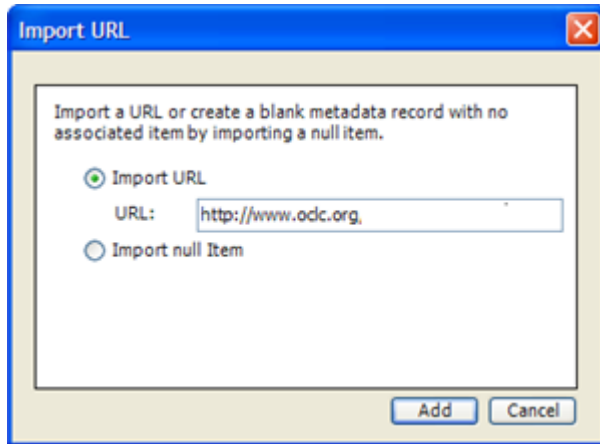


Figure 9. Add URL

2. The Add URL screen displays. Select **Import URL** and type the complete URL, into the dialog box and click **Add**. Or select **Import null item**.
3. Click **Add**. The Add URL screen closes and the project spreadsheet displays.
4. Enter metadata in the project spreadsheet or click the item thumbnail to open the Item Edit tab.

## Adding Multiple Items

This tutorial focuses on the simplest method for adding multiple items; other tutorials describe more complex operations in detail, such as adding multiple items with tab delimited text or adding compound objects.

It is often more efficient to add items in batches. Some organizations perform their scanning and image processing work ahead of time, and then add batches of items to the Project Client. A staggered workflow can help you to take advantage of some of the Project Client settings that make it more efficient to add many items at once. If you are adding multiple items that have common metadata, use the **metadata templates** to create your metadata before adding items.

Before you add multiple items, all the files you want to add must be stored in a single directory. When you add items to the Project Client, a thumbnail image is created for each item. The Project Client will first try to create a thumbnail image based on the actual item you add. So for example, if you add a video, the Project Client will attempt to render the first frame of your video file as the thumbnail image for that item. If the first frame cannot be rendered then a standard CONTENTdm thumbnail image for that file type will be used.

You can also **customize thumbnail** images for all file types if, for example, you want all oral histories to be represented by the same thumbnail image.

**To add multiple files:**

1. The files you want to add must be in a single directory. Navigate to the Home tab or Project tab
2. On the left task pane under Common Tasks, click **Add Multiple Items**. The Add Multiple Items wizard opens.

3. Select from the two options:
  - **Import from a directory.** (This method is the focus of the tutorial.)
  - **Import using tab-delimited text file.** To add items using this method, not only must all items be in one directory, you must also have a tab-delimited text file that lists the files and contains metadata about the files that are being added. For more information about this type of import, see **Adding Compound Objects with Tab-delimited Text.**
4. Click **Browse** to select the directory containing the files you want to import. Once you have opened the directory, click **OK** and then click **Next**.

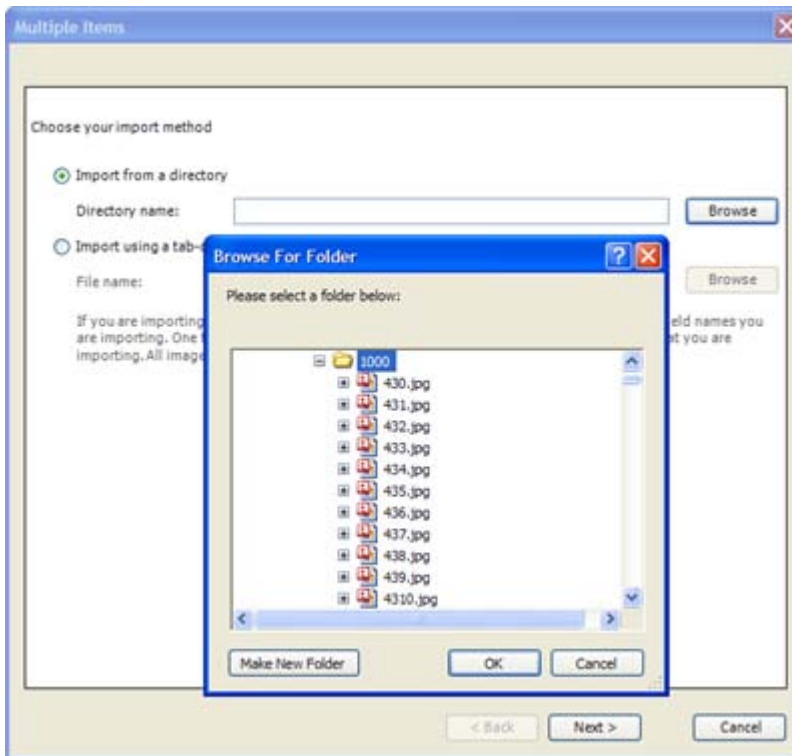


Figure 10. Adding Multiple Files from a Directory

5. Specify whether CONTENTdm should create a display image. (If your collection administrator has enabled **Archival File Manager**, this screen will have a slightly different appearance from the one shown below.)

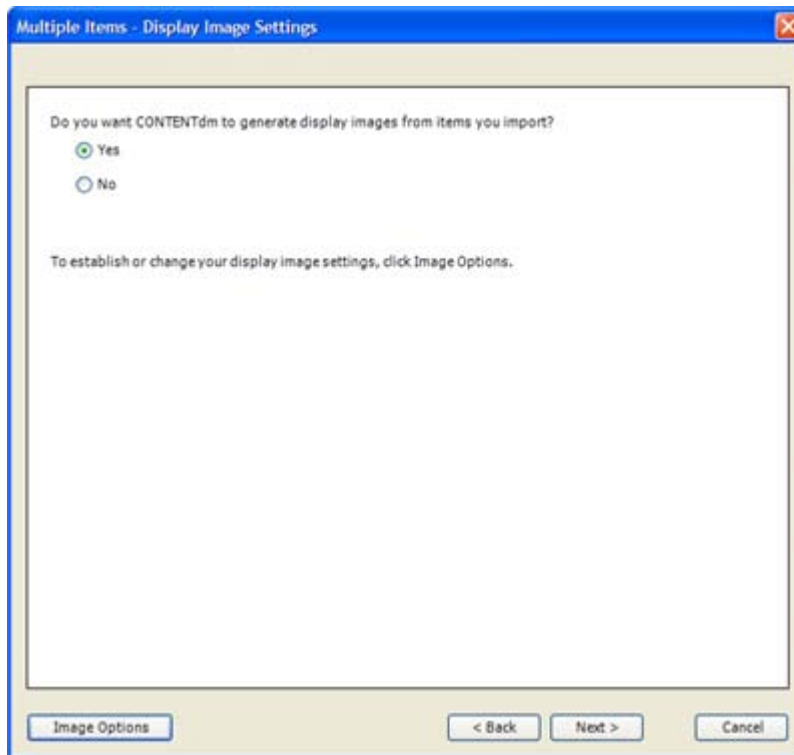


Figure 11. Display Image Settings

If you select **Yes**, and you want to specify display image settings, click **Image Options**. This opens the **Images & Thumbnails settings** in the Project Settings Manager.

Creating display images is useful when you are working with high-resolution images which are very large and only minimally (or un-) compressed. CONTENTdm can create display-quality versions of images when you add high-resolution files, minimizing file download time for end users and eliminating the need to store these large, uncompressed high resolution files on your CONTENTdm server.

6. Click **Next**. The Confirm Settings screen displays import information.

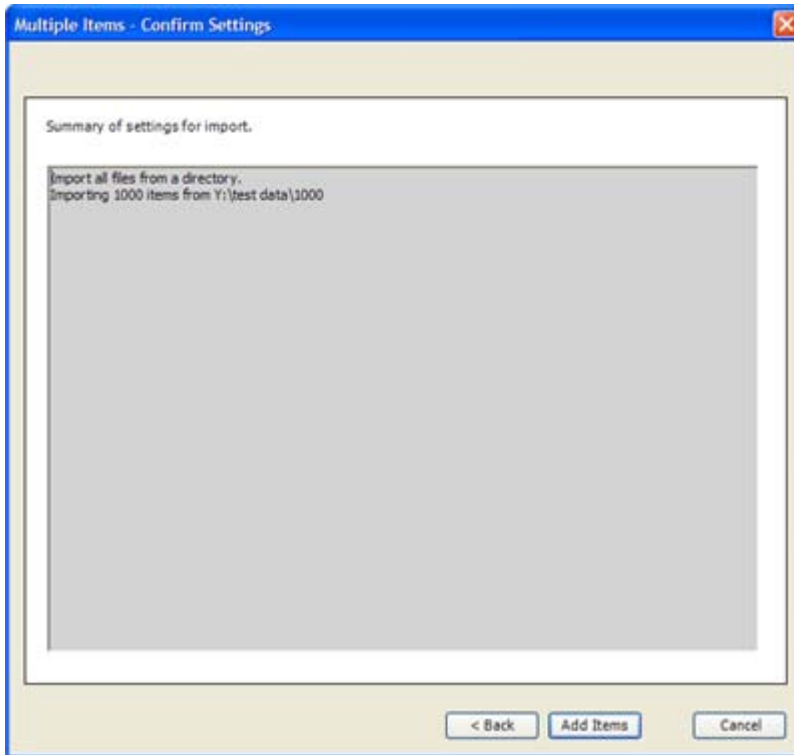


Figure 12. Confirm Settings

Review the settings and click **Add Items**. Or click **Back** to make changes.

A progress screen displays as the items are added to your project. When complete a summary screen displays to show any errors or warnings.

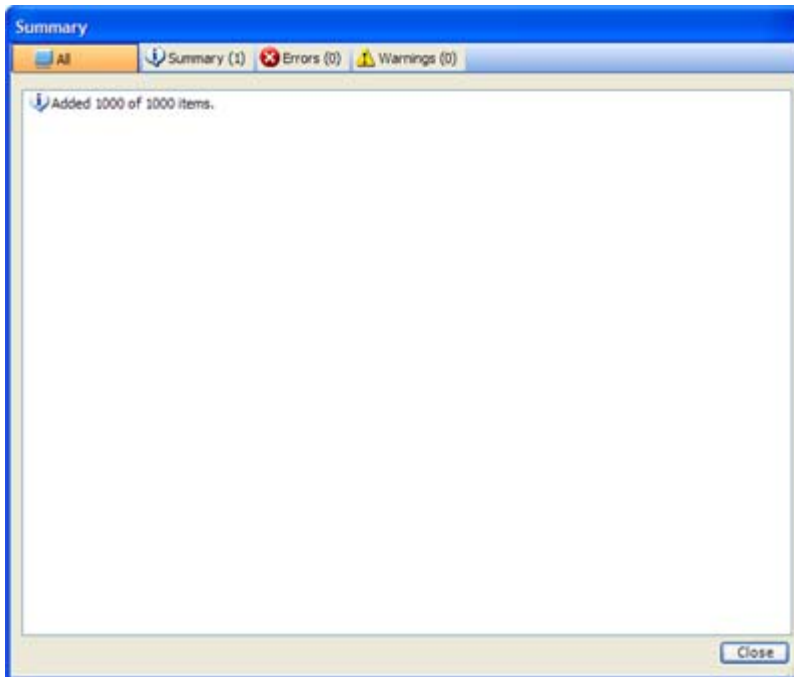


Figure 13. Summary

7. Click **Close**. The items are displayed in the project spreadsheet. You are now ready to enter metadata.

## Section IV: Entering Metadata

Once items are added to your project, metadata can be entered one item at a time by typing text directly into the project spreadsheet or Item Edit tab.

### Using the Project Spreadsheet

The project spreadsheet is displayed when you click on the Project tab. To add or edit metadata, click the cell you want to change and then type your text.

To replicate the text of one cell to other cells within the same column, right-click on a cell and choose **Fill Down**, **Fill Up**, or **Fill All** (fills both above and below in the same column). This function is also available by selecting **Fill** from the Edit menu.

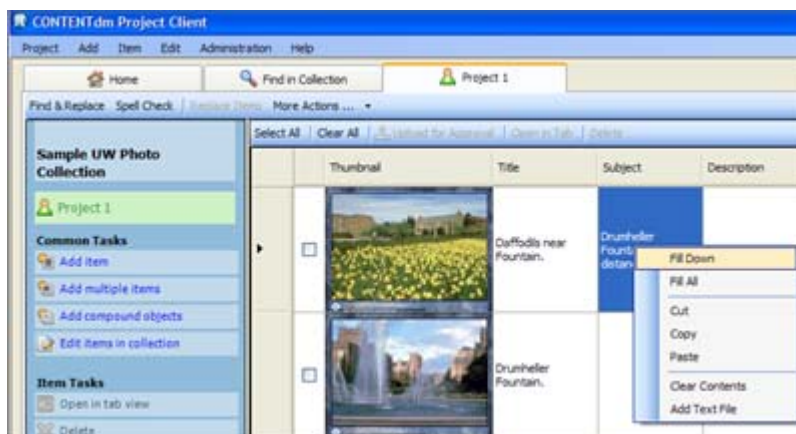


Figure 14. Fill Menu Option

Keyboard shortcuts within the project spreadsheet make it easier to enter metadata and perform common operations without using a mouse.

#### To navigate within the cells:

- Press **Tab** to close the current active cell and move one cell to the right.
- Press **Shift + Tab** to close the current active cell and move one cell to the left.
- Press **Enter** to close the current active cell and move down one row.
- Press **Ctrl + c** to copy text from an outlined cell.
- Press **Ctrl + v** to insert copied text into an outlined cell.
- Press **Ctrl + x** to cut text from an outlined cell.
- Press **Ctrl + arrow key** to move to the farthest cell in that direction.
- Press **Ctrl + Enter** to insert a carriage return in the text in an active cell. This formatting is retained only when used in a full text field and the page text and page image are displayed side by side in the CONTENTdm Web interface.

For more information about these features and more advanced metadata functions, such as the Project Settings Manager and using the Controlled Vocabulary, consult the **Project Client Help files**.

## Using the Item Editing Tab

You can open the Item Editing tab from the project spreadsheet. Up to 20 items at a time can be opened in Item editing tabs. The Item Editing tab provides access to view the item about which you are entering metadata. The Item Editing tab also has navigation to view the next and previous items without returning to the project spreadsheet.

### To use the Item Editing tab to enter metadata for an item:

1. Click on the thumbnail image of the item in the project spreadsheet to open the Item Editing tab or select the checkbox next to the item or items and click **Open in Tab**.
2. Type the text you want to associate with each field into the corresponding text box.

If a selected field is governed by a Controlled Vocabulary, the Controlled Vocabulary pane will display all items allowed for that field.

3. Once you have finished entering data, click **Save** to keep your changes.
  - **Save & Next** commits your changes, closes the current item, and opens the following item in the project spreadsheet
  - **Save & Back** commits your changes, closes the current item, and opens the preceding item in the project spreadsheet.

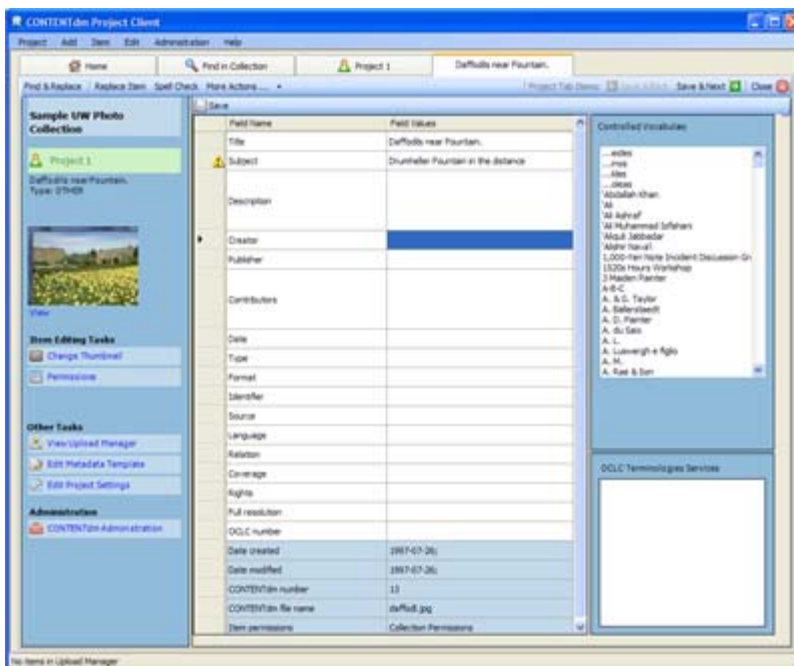


Figure 15. Item Editing Tab

- Administrative metadata fields are displayed on a blue background.

- Warning and error icons are displayed in the far left column of the spreadsheet. Hovering over the icons displays information about the warning or error.
  - A red error icon indicates an error within a metadata field (such as a required field that contains no data) which must be resolved before the item can be uploaded to the pending queue.
  - A yellow warning icon indicates an error within a metadata field, such as a misspelling or use of a term not in the controlled vocabulary. Items with warning icons can be uploaded for approval but may still require edits from the collection administrator.

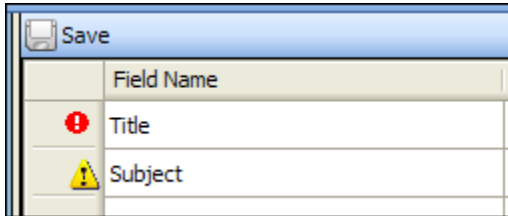


Figure 16: Error and Warning Indicators

## Section V: Uploading Items for Approval

New items are uploaded into your CONTENTdm database using:

- HTTP or HTTPS (depending on your server URL)
- Shared directory

After you create a project, the upload method can be changed in the Project Settings Manager > Project Options screen.

### To upload items in your project:

1. From the Project tab, select the items you want to upload by selecting the checkbox in each item row. Or click **Select All**.
2. Click **Upload for Approval**. When uploaded, the images are transferred to the pending queue and are ready for review and final approval by the collection administrator before being added to the collection.

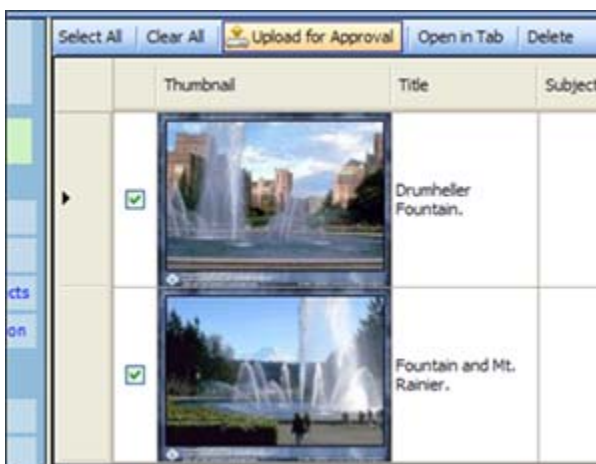


Figure 17: Upload for Approval

## Section VI: Approving Items

Before new items are added to a collection, the items must be approved and indexed. You must have CONTENTdm administrator rights to approve items and build indexes. You can view or edit items before approving them by opening CONTENTdm Administration through the Project Client or through the Web.

### To view pending items from a project:

1. Click **Approve** from the Administration menu.
2. Enter your CONTENTdm user name and password. The Approve items screen is displayed and all items pending approval are shown.

### To view pending items from the Web (useful when working on machines where the Project Client is not installed):

1. In your Web browser address bar, enter `http://your.server.address/cgi-bin/admin/start.exe`
2. Enter your CONTENTdm user name and password when prompted.
3. Click on the **Items** tab to access the Approve items screen. All pending items are shown.

**Tip:** Some organizations find it useful to assign one person to be responsible for approving items before they are added to the collection. This is particularly helpful when you have multiple people entering metadata because one person verifies the accuracy and consistency of the items.



Figure 18. Approve Items

Items that have been uploaded from Project Clients and are waiting for approval will appear on the Approve items screen. If the collection utilizes a controlled vocabulary, any new terms that are submitted for approval will also be on this page. Administrators may add, edit, or delete individual items in the pending queue.

**To work with Controlled Vocabulary:**

- To accept the new term and add it to the controlled vocabulary, click **Add** from the Detailed approval queue actions.

Or:

- To edit or delete the term within the item metadata, click **Edit** next to the item with an asterisk from the pending items queue,
- If the same term appears in the metadata of multiple items click **Edit** from the Detailed approval queue actions to view the Edit List. Click **Edit** next to the item that you wish to edit. This opens the item and metadata so you can view the term in context. Change the term within the item metadata. Click **Approve** to add the item to the collection.

**To view an item in the pending queue:**

- Click **Edit** next to the item that you want to view. The item opens and metadata fields are displayed and may be edited.

**To approve an item:**

- Click **Approve** at the bottom of the metadata page after making changes to the metadata.

Approved items are added to the collection but do not become searchable until the text index is built.

**To approve and index all items in the pending queue:**

- Select **Approve and index all** and click **go**. Approving and indexing all items may take several minutes. When the two operations, approving and indexing are completed, no items remain in the queue for approval.



Figure 19. No Pending Items

Once items are approved and the build of the text index is complete, the items are in the collection and can be searched and retrieved in the CONTENTdm Search Client. The figure below shows how an item will appear when it is retrieved in the CONTENTdm Search Client.

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Figure 20. Viewing an Item