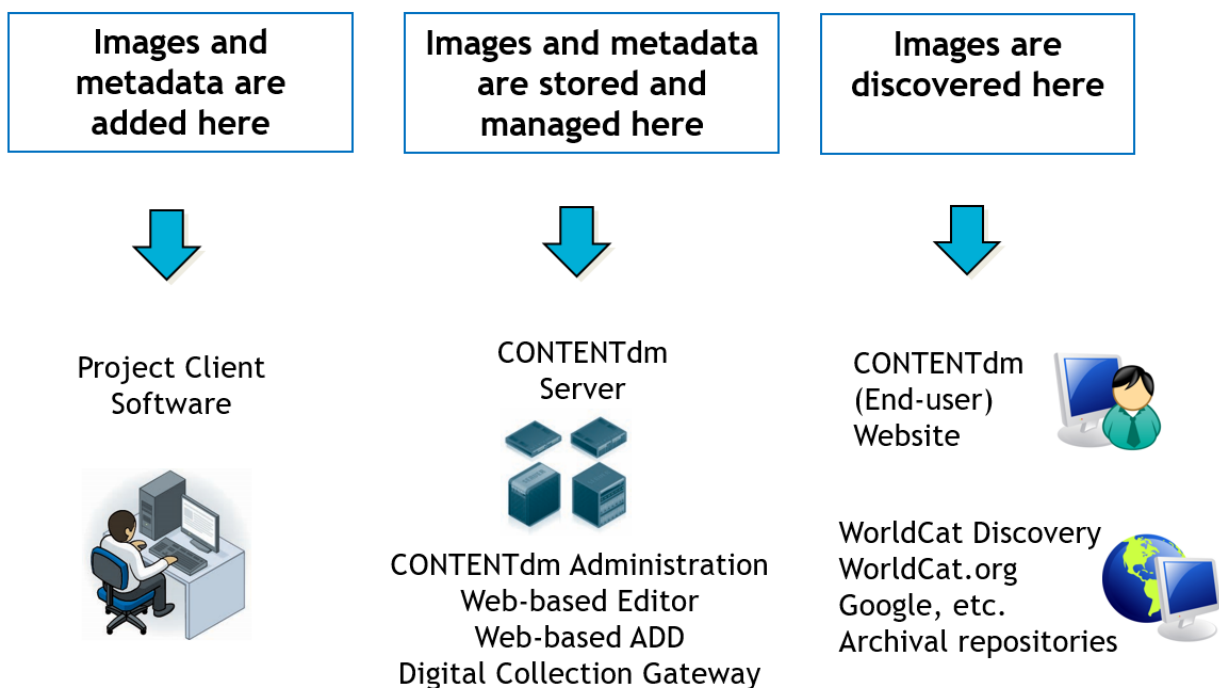


CONTENTdm Basic Skills 1: Getting started with CONTENTdm

Class Handout

CONTENTdm system architecture

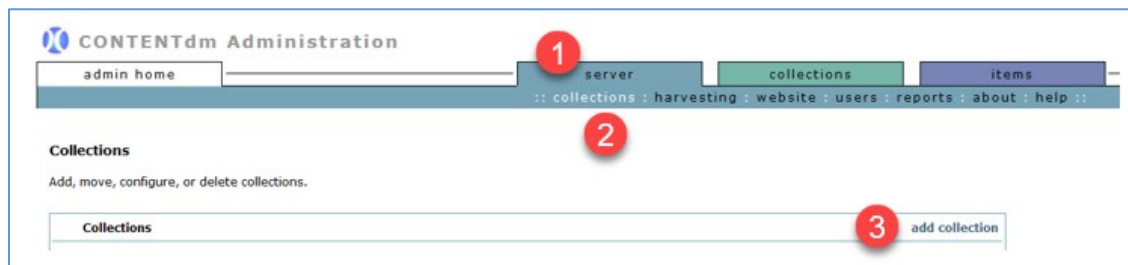


CONTENTdm terminologies

- **Collection** shares a common metadata schema; resides on the CONTENTdm server.
- **Project** is a working space within the Project Client; resides on your local workstation.

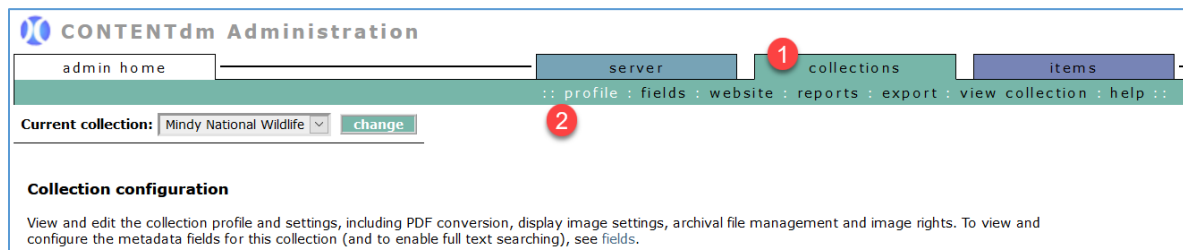
Build a digital collection

Step 1: Add a collection on the CONTENTdm server



1. Under CONTENTdm Administration, click the **server** tab
2. Click **collections**
3. Click **add collection** to add a new collection
4. Select an existing *collection* from the drop-down to use as a template
5. Enter a *name* for the new collection
6. Enter an *alias* for the new collection
7. Click **add** to create the new collection

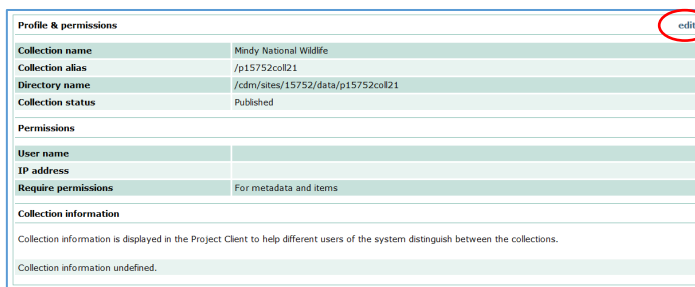
Step 2: Configure a collection on the CONTENTdm server



1. Under CONTENTdm Administration, click the **collections** tab
2. Click **profile** link to configure the *profile & permissions* and the *optional collection settings*

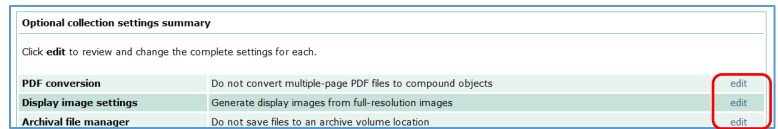
To edit the *Profile & permissions* section

- Click **edit** link on to the right of the section
- Edit as needed:
 - Collection name
 - Collection status
 - Collection permissions
 - Collection information
- Click **save changes** when done



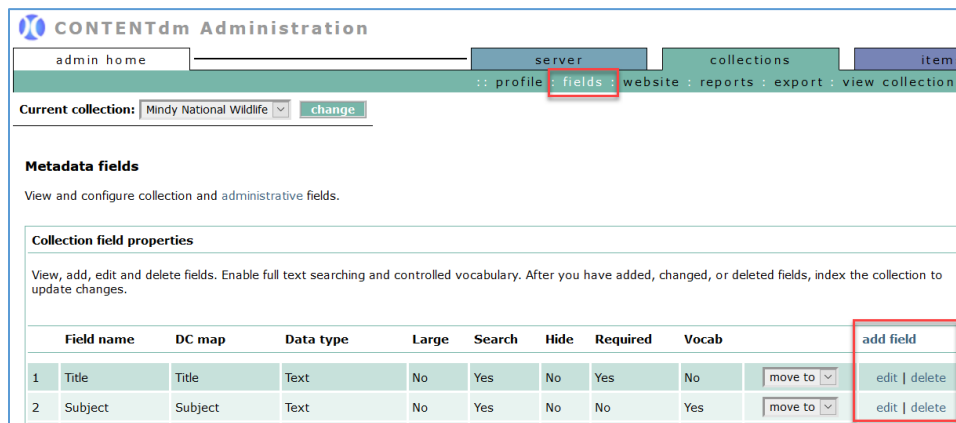
To edit each option in the *Optional collection settings summary* section

- Click **edit** link to the right of each option
- Edit the desired option(s)
 - PDF conversion
 - Display image settings
 - Archival file manager
- Click **save changes** when done



Optional collection settings summary	
Click edit to review and change the complete settings for each.	
PDF conversion	Do not convert multiple-page PDF files to compound objects edit
Display image settings	Generate display images from full-resolution images edit
Archival file manager	Do not save files to an archive volume location edit

To edit metadata *fields* for this collection



CONTENTdm Administration

admin home server collections items

profile fields website reports export view collection

Current collection: Mindy National Wildlife change

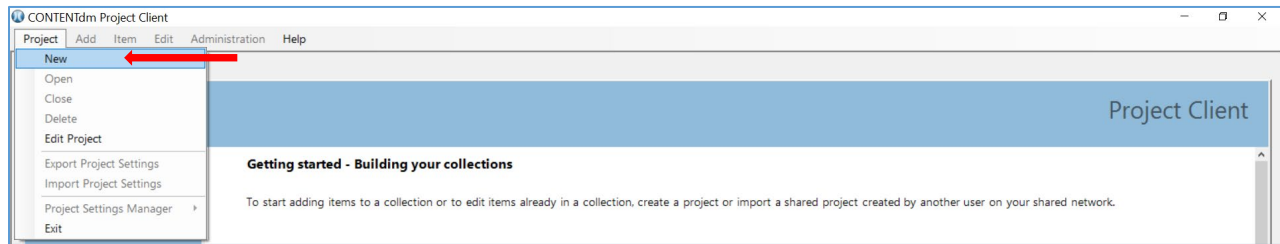
Metadata fields
View and configure collection and administrative fields.

Collection field properties
View, add, edit and delete fields. Enable full text searching and controlled vocabulary. After you have added, changed, or deleted fields, index the collection to update changes.

Field name	DC map	Data type	Large	Search	Hide	Required	Vocab		add field
1 Title	Title	Text	No	Yes	No	Yes	No	move to	edit delete
2 Subject	Subject	Text	No	Yes	No	No	Yes	move to	edit delete

1. Under *collections* tab, click **fields** link
2. View, add, edit, or delete metadata fields
 - To add new metadata field
 - a. Click **add fields**
 - b. Enter data for the new field
 - c. Click **Save changes** to add new field
 - To edit existing metadata field
 - a. Click **edit** next to the desired field to modify
 - b. Edit the field
 - c. Click **Save changes** to update
 - To delete existing metadata field
 - a. Click **delete** next to the desired field to remove
 - b. Click **Yes** to confirm **OR cancel**
3. Use the **move to** drop-down menu next to each field to re-order metadata fields
4. **Index** the collection to update changes to metadata fields. To **index** the collection:
 - Click **items** tab
 - Click **index**
 - Under Index scheduler, click **index now**

Step 3: Create a project in the Project Client



1. Open your Project Client
2. Click **Project** menu, then select **New**
3. Enter the URL for your library's CONTENTdm server.
4. Enter your logon credentials to the server. Click **Next**
5. Select the collection to associate with this project. Click **Next**
6. Enter a **name** for the project
7. Click **Finish** to create the new project

Step 4: Configure a project

Use the *Project Setting Manager* to configure your project.

1. Click the tab with the name of the current project
2. Click the **Project** menu
3. Select **Project Settings Manager**
4. Select the *setting* you wish to configure
 - **General settings**: contains information about the project and the collection to which it is contributing items; can export these setting for use in other projects
 - **Metadata templates**: use to streamline adding metadata to items imported into the project
 - **Metadata field types**: contains information about how the metadata fields are defined for the collection
 - **Images & thumbnails**: use to modify the size and type of your display images; create watermarks, brands, and bands
 - **Image rights**: use to configure the display of copyright information or indicate ownership of items in the collection; must be configured before importing items
 - **Processing and OCR**: use if you want to create fully searchable text
 - **Project options**: use to configure how upload items in the project to the collection on the server; use and setup the spell checker
 - **Find in Collection**: useful for maintaining already-built collections

Step 5: Add digital items and objects to the project

Items (images, compound objects, PDF files, URLs, videos, etc.) can be imported to the project spreadsheet in several ways.

To add digital files to the project:

1. Click the **Add** menu
2. Select the *option* to add
 - **Item**: ideal if you only have a few files to add; can add several files from a single folder or directory using '*ctrl-click*'
 - **Multiple items**: use to add ALL files in a single folder or directory
 - **Compound Object(s)**: use to add multiple related files (e.g., pages in a document, audio files on a CD, postcards, etc.)
 - **Finding Aid**: use to add Encoded Archival Description (EAD) file is XML
 - **URL**: use to add links to web pages or streaming media servers
3. Browse to folder/directory to locate the desired file to add
4. Select the desired file
5. Click **Add** to import the file into the project
6. Click **Close** to dismiss the *Summary Screen*

To view and edit the digital items after they have been imported to the project:

1. In the project spreadsheet, double-click to open an item/file
2. Edit the item metadata
3. Click **Save** at the top of the editor to save changes

To upload digital items to the collection on the server:

1. In the project spreadsheet, select each item to upload (or use **select all** to select all items)
2. Click **Upload for Approval** at the top of the project spreadsheet
3. Fix any errors and select those items to **Upload for Approval** again

Step 6: Approve and index the collection

To approve items uploaded to the collection:

1. In the Project Client, click **Administration** menu
2. Select **approve** (Note: This open to the approval page of CONTENTdm Administration)
3. (Optional) Can select to *Approve all* or *Approve and Index All*
4. Select *individual items* or *select all* to approve
5. Click **go**

To index the collection:

1. In CONTENTdm Administration, click the **items** tab
2. Click **index**
3. Under *Index Scheduler* section, click **Index Now** to index the collection immediately
OR
4. Schedule the index
 - Select **Once on** to schedule the index process to run on a specified date and time
 - Select **Recurring at** to specify day(s) and time for the index process to run more than once

Support and Resources

Community

- **Community Center**
<https://community.oclc.org/>

Support & Training

- **Documentation**
[CONTENTdm](#)
- **Training** (includes instructor-led sessions, recordings, tutorials)
[CONTENTdm training](#)

Office Hours

- 3rd Thursday of every month via **WebEx** (no registration required)
- Details for access code and call-in numbers: [Office hours](#)

Contact Customer Support

- **United States:** 1-800-848-5800 or support@oclc.org
- **In your region:** [OCLC Support in your region](#)