

# CONTENTdm Basic Skills 2: Working with Text in CONTENTdm

## Class Handout

### Build a digital collection

1. Add a collection
2. Configure the collection
3. Create a project in the Project Client
4. Configure the project
5. Add digital items and/or objects
6. Approve items/objects and index collection

### Compound object types

- **Postcard** – front and back images of two-sided items (e.g., tickets, baseball cards)
- **Document** – sequential pages of a report, a journal, a photo album, etc.
- **Monograph** – retain the hierarchical structure of documents, including chapters, sections, and pages
- **Picture Cube** – select up to six images to link together views of a 3-dimensional object

### Configure or reconfigure a collection for text

#### 1: Metadata fields

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

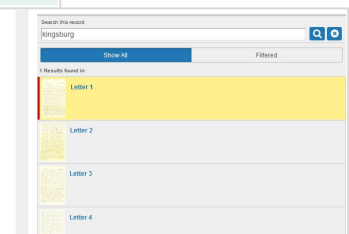
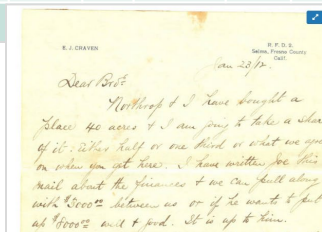
## To edit metadata *fields* for this collection

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

## 2: Data type – Full Text Search

Only **one** metadata field per collection may have a data type of **full text search**.

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	No	move to   edit   delete
3	Description	Description	Full Text Search	Yes					



Rich discovery for your end-user

**Transcript**  
Jan. 23/12

Dear Bros.

Northrop & I have bought a place 40 acres & I am going to take a share of it. Either half or one third or what we agree on when you get here. I have written Joe this mail about the finances & we can pull along with \$3,000.00 between us or if he wants to put up \$8,000.00 well & good. It is up to him.

The place in ques<sup>n</sup> is 6 miles from here. South East & 9 m. from Northrop. Fine roads as level as a floor & about 35 min. run on a bike.

You will be 2 miles from Kingsburg on a main road. Mail route & telephone. There is a 3 room house, large new barn, hen houses, cow shed & tool shed. All trays sweat boxes & farming implements, mower & rake go with the place also two Black mares & work harness. The mares are 16 years old and yud & yentel (good & gentle) 17 acres peaches 12 acres Muscat Vines 7a alfalfa & 3 acres Gum trees, 1 ac farm yard & buildings. You will need to buy a cow

# Compound objects – file organization

## 1: Postcards

- Only two image files can be imported for postcards
- Transcript files are optional—can be one or two transcript files (.txt)
- Root file names for images must match optional transcript files
- All image files will be in one folder (or directory) and transcript files in its own folder (or directory)

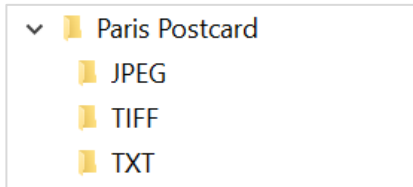


Image File Name	Transcript File Name
paris1.jpg	
paris2.jpg	paris2.txt

## 2: Documents

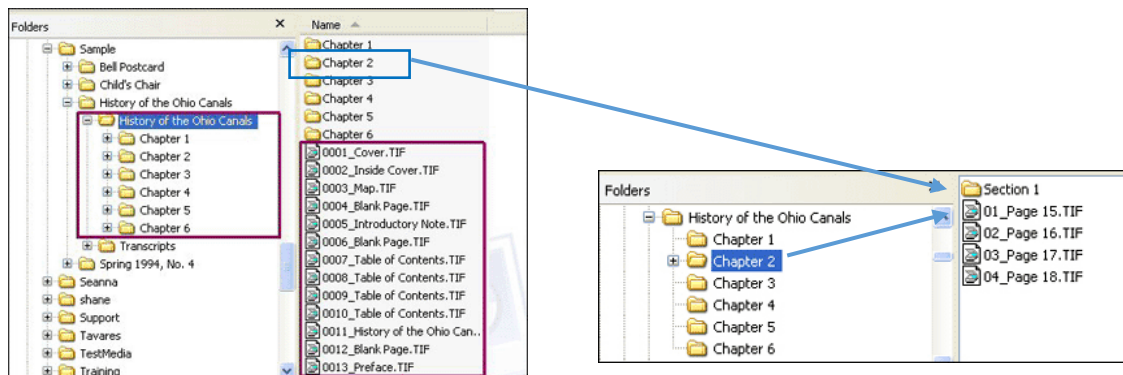
- Transcript files are optional—can be one or two transcript files (.txt)
- Root file names for images must match optional transcript files
- All image files will be in one folder (or directory) and transcript files in its own folder (or directory)



Image File Name	Transcript File Name
bell1.tif	bell1.txt
bell2.tif	bell2.txt
bell3.tif	bell3.txt

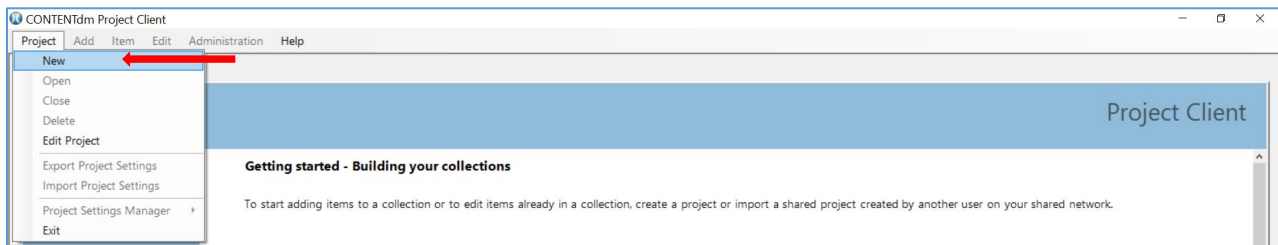
## 3: Monographs

- Organize image files to reflect the hierarchy of the monograph (e.g., images of chapters or sections in its own folder/directory)
- All optional transcript files can be together in a separate folder/directory, but outside the hierarchy of the monograph



# Project Client: Import compound objects

## 1: Create a new project



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

## 2: Configure the project

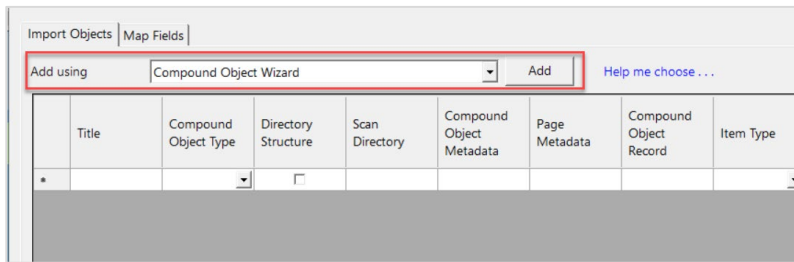
Use the *Project Setting Manager* to configure your project.

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

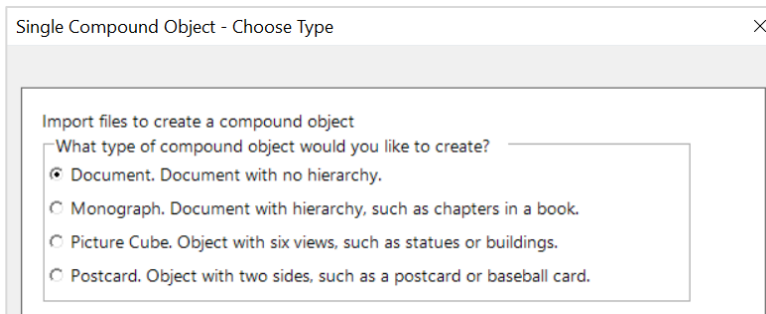
### 3: Add compound objects

To add digital files to the project:

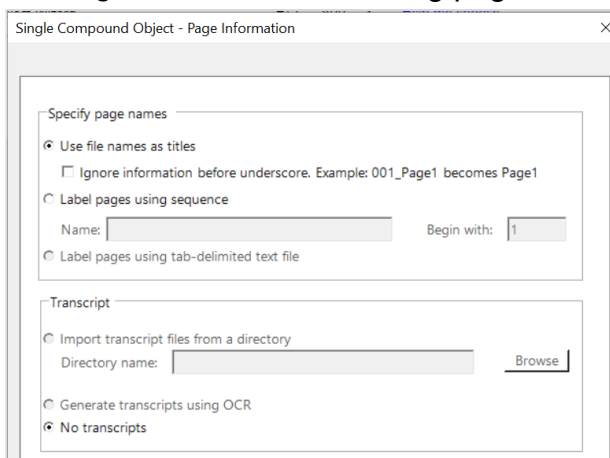
1. Click the **Add** menu
2. Select **Compound Objects**  
*Note:* use to add multiple related files (e.g., pages in a document, audio files on a CD, postcards, etc.)
3. Add using *Compound Object Wizard*. Click **Add**



4. Select the **type** of compound object to create. Click **Next**



5. Browse to folder/directory to locate the desired image folder to add
6. Select the desired folder. Click **Next**
7. Select **Yes** to generate display images. Click **Next**
8. Select *Page Information*, including page names and location of transcripts. Click **Next**



9. Click **Finish** to add compound object
10. Click **Close** to dismiss the *Summary Screen*

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

1. In the project spreadsheet, double-click to open a compound object
2. Edit the object and items metadata
  - a. **View Structure** – use the left-navigation to display and edit metadata for the object and each item in the compound object
  - b. **View Thumbnails** – use the thumbnails to display and edit metadata for the object and each item in the compound object
  - c. **View Spreadsheet** – display the object and each item in the compound object in a spreadsheet view for editing
3. Click **Save** at the top of the editor to save changes

To upload digital objects to the collection on the server:

1. In the project spreadsheet, select each object to upload (or use **select all** to select all objects)
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

## Approve objects/items 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

# PDF files

## PDF characteristics

- Ideal file format for documents initially created as digital documents (e.g., dissertations)
- Not ideal file format for scanned images because scanned items do not automatically contain embedded text
- Adobe Acrobat Reader required to read PDF files

## PDF files in CONTENTdm

- A PDF file can be treated as
  - Single file
  - Compound object
- An advantage to converting a PDF file to a compound object is that *each page of the PDF becomes a page with its own metadata record.*

## Add PDF files

### 1: Add PDF as a single item:

- Under *Project Settings Manager*, select **Metadata templates**
  - Configure PDF metadata template, as needed
- To add a single PDF file
  - Click the **Add** menu
  - Select **Item**
  - Browse to folder/directory to locate the desired file to add
  - Select the desired file
  - Click **Add** to import the file into the project
  - Click **Close** to dismiss the *Summary Screen*

### 2: Add PDF as a compound object:

- Under *Project Settings Manager*, select **Processing**
  - In *PDF File Conversion* section, select **convert PDF to compound objects**
- To add a single PDF file
  - Click the **Add** menu
  - Select **Item**
  - Browse to folder/directory to locate the desired file to add
  - Select the desired file
  - Click **Add** to import the file into the project
  - Click **Close** to dismiss the *Summary Screen*

# Support and Resources

## Community

- **Community Center**  
<http://www.oclc.org/community/home.en.html>

## Support & Training

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

## Office Hours

- Details for access code and call-in numbers: [Office hours](#)

## Contact Customer Support

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