

CONTENTdm Basic Skills 3: Maintaining collections in CONTENTdm

Class Handout

Maintain a collection using Project Client

Edit *item* metadata

1. Open your desired project
2. In the **Find in Collection** tab, **search** or **browse** for item
3. Select the item and click **Add to project (edit)** for editing
4. Click on *your project* tab
5. Edit the item(s) metadata
6. **Upload** the edited item(s)
7. **Approve** items and **index** collection

Edit *object* structure and metadata

1. Open your desired project
2. In the **Find in Collection** tab, **search** or **browse** for object
3. Select the item and click **Add to project (edit)** for editing
4. Click on *your project* tab
5. Edit the object(s) structure and/or metadata
6. **Upload** the edited object(s)
7. **Approve** items and **index** collection

Find and Replace metadata

1. Open your desired project
2. In the **Find in Collection** tab, **search** or **browse** for item or object
3. Select the item or object and click **Add to project (edit)** for editing
4. Click on *your project* tab
5. Select **Find and Replace** to find term(s) in selected items or objects and replace with new term(s)
6. **Upload** the edited items and/or object(s)
7. **Approve** items and **index** collection

Replace item

1. Open your desired project
2. In the **Find in Collection** tab, **search** or **browse** for item or object
3. Select the item and click **Add to project (edit)** for editing
4. Click on *your project* tab
5. Select **Replace Items** to replace selected item and edit item metadata
6. **Upload** the edited item(s)
7. **Approve** items and **index** collection

Keyboard shortcuts when using project spreadsheet

Shortcut	Description
Tab	Close the current active cell and move one cell to the right
Shift + Tab	Close the current active cell and move one cell to the left
Enter	Close the current active cell and move down one row
Ctrl + c	Copy text from an outlined cell
Ctrl + v	Insert copied text into an outlined cell
Ctrl + x	Cut text from an outlined cell
Ctrl + arrow key	Move to the farthest cell in that direction
Ctrl + Enter	Insert a carriage return in the text in an active cell. This is displayed when used in a full-text search field.

Maintain a collection using CONTENTdm Administration

Edit *item* metadata

1. Under the **item** tab, click **edit**
2. **Search** or **browse** for the item
3. Click **metadata** link next to item to open
4. Edit the item metadata
5. Click **Save changes**
6. **Index** collection

Edit *object* structure and metadata

1. Under the **item** tab, click **edit**
2. **Search** or **browse** for the item
3. Click **structure** or **metadata** link next to item to open
4. Edit the object structure and/or metadata
5. Click **Save changes**
6. **Index** collection

Find and Replace metadata

Note: *Be careful. You cannot Undo this change*

1. Under the **item** tab, click **find & replace**
2. Determine whether to replace metadata within one field or all fields, or change metadata in a specific field
 - Find and replace a single field
 1. **Find** the term(s) to replace
 2. Select **field** to search from drop-down
 3. **Replace with** the desired term(s)
 4. Click **replace** to update change
 - Find a replace across all fields
 1. **Find** the term(s) to replace in all fields
 2. **Replace with** the desired term(s)
 3. Click **replace** to update change
 - Change field metadata
3. **Index** collection

Add items using CONTENTdm Administration

1. Under **items** tab, click **add** link
2. Select **add an item** or **add URL**
3. Add metadata for item
4. Click **Save changes** to add the item
5. **Approve** item(s) and **index** collection

Build a compound object using CONTENTdm Administration

1. Under **items** tab, click **edit** link
2. **Search** or **browse** for the items
3. Select items to **add to compound object**
4. Add or edit object metadata
5. Click **Save changes** to add the items
6. **Approve** item(s) and **index** collection

Using Tab-delimited method in the Project Client

Import multiple items and metadata using a tab-delimited text file

1. Organize your files

Looking at the .txt file we can identify the image file names

.txt file sits outside of the image directory

The image files are stored in one directory

	A	B	C	D	E	F	G	H
1		Title	Date	Source				
2		Cycling Medal Front	1903	IMG_C007.jpg				
3		Photo Album Page 2	1881	IMG_C009.jpg				
4		Photo Album Page 1	1881	IMG_C010.jpg				
5		Photo Album Page 3	1881	IMG_C011.jpg				
6		Closehead Lane	1997	IMG_C014.jpg				
7		David A. Craven	1918	IMG_C015.jpg				
8		Marie Theresa Waddington	1905	IMG_C019.jpg				
9								
10								

2. Import your files into the project

Click a Collection field to map it to the imported field.

Imported Fields	Collection Fields
Date	Date
Type	Type
Format	Format
Identifier	Identifier
Language	Language
Relation	Relation
Coverage	Coverage
Rights	Rights
Audience	Audience
Tag	Tag
Transcript	Transcript
Source	Object File Name

- ✓ Check that the imported metadata will land in the correct collection field
- ✓ Check that the last field contains the pointer to the location of image files – map to “Object File Name”

3. Edit your item(s)

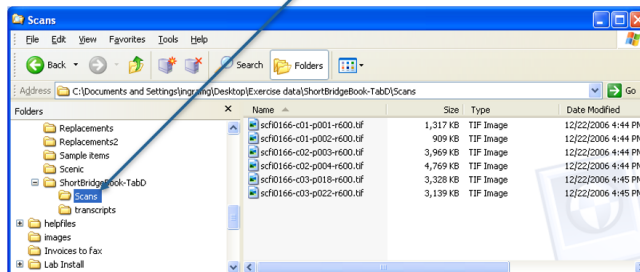
4. Upload for approval

5. Approve and index collection

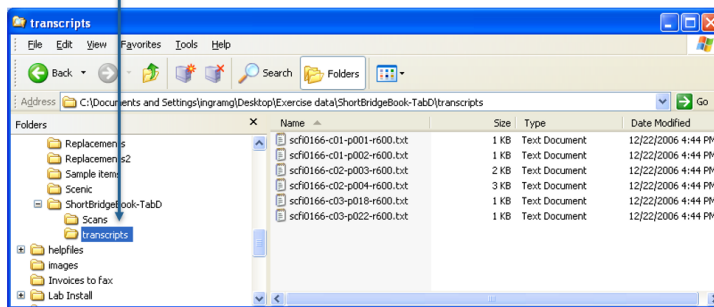
Import compound objects and metadata using a tab-delimited text file

1. Organize your files

Image files are in one parent folder rather than in subfolders



Transcript files, if you have them, are also all in one parent folder



Tab-delimited text file that contains the metadata without hierarchical structure

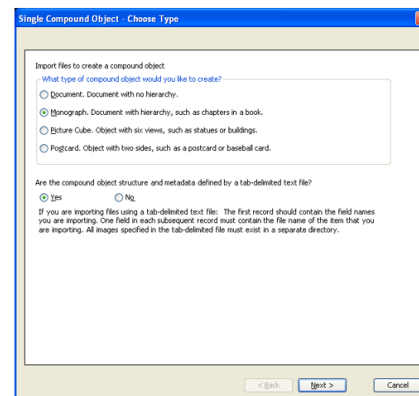
	Title	Creator	Subject	Date	Tag	Filename
1	Craven Letter	Edgar Craven	farm life	1805	craven	
2	Craven Letter page 1	Edgar Craven	farming	1805	craven	LTR_C015.jpg
3	Craven Letter page 2	Edgar Craven	farming	1805	craven	LTR_C016.jpg
4	Craven Letter page 3	Edgar Craven	travel	1805	craven	LTR_C017.jpg
5	Craven Letter page 4	Edgar Craven	travel	1805	craven	LTR_C018.jpg

Tab-delimited text file that contains the metadata and shows the hierarchal structure

	CDM_LVL	CDM_LVL_NAME	Title	Creator	Identifier	Book Title	Tag	Filename
1	A Full and Complete Des	A Full and Complete Des	Farrington, Edmund F.	A Full and Complete shortbridge				
2	0 A Full and Complete Des	A Full and Complete Des	Farrington, Edmund F.	scfi0166c01p001	A Full and Complete shortbridge			scfi0166-c01-p001-r600.tif
3	0 A Full and Complete Des	A Full and Complete Des	Farrington, Edmund F.	scfi0166c01p002	A Full and Complete shortbridge			scfi0166-c01-p002-r600.tif
4	1 Description of the Bridg	Description of the Bridg	Farrington, Edmund F.	scfi0166c02p003	A Full and Complete shortbridge			scfi0166-c02-p003-r600.tif
5	2 The Anchorages	The Anchorages - Page	Farrington, Edmund F.	scfi0166c02p004	A Full and Complete shortbridge			scfi0166-c02-p004-r600.tif
6	1 Advertisements	Advertisements - Page	Farrington, Edmund F.	scfi0166c03p018	A Full and Complete shortbridge			scfi0166-c03-p018-r600.tif
7	1 Advertisements	Advertisements - Page	Farrington, Edmund F.	scfi0166c03p022	A Full and Complete shortbridge			scfi0166-c03-p022-r600.tif

2. Import your files into the project

1. Use Compound Object Wizard
2. Select the **Type of Compound Object**
3. Select **Yes** to use a tab-delimited text file
4. Point the Wizard to the locations of the **.txt** file, the **image** folder, and optional **transcript** folder
5. Confirm mapping of metadata fields
6. Upload, Approve, Index



3. Edit your object(s)
4. Upload for approval
5. Approval and index collection

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

- 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](#)