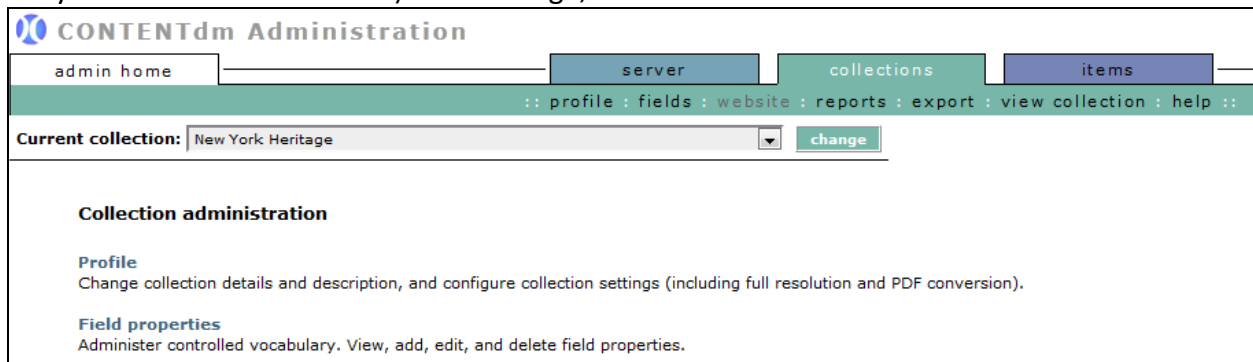


Setting up Excel Spreadsheets for Single Item or Compound Object Metadata

- 1) First, your fields in your collection's Field Properties must match the fields you will be using in your spreadsheet. Initially, your collection will be configured with all of the metadata fields from the New York Heritage Metadata Template.
- 2) The first row of your Excel file must be the field names for your collection. You can type the field names of the New York Heritage Metadata Template into the first row of an Excel spreadsheet, or you can use a tab-delimited text file to avoid manually keying in the field names. You can create the tab-delimited text file easily by exporting the metadata from your collection.
 - One reason you may want to export the metadata from your collection is if the fields or field names were customized for the special needs of your collection, as per your regional library council's digital services contact.
 - Be aware that this export is only efficient if your collection is new and empty. If there are items already in that collection, the export will export all metadata in that collection, so you will have to delete all but the first row of field names to get a clean start. If your collection already has items in it, as in an institutional collection that has one or more sub-collections to which you are adding a new sub-collection, you will need to manually key the field names of the New York Heritage Metadata Template into your Excel spreadsheet and bypass the export method.
- 3) If you wish to export the fields from your collection, go to [CONTENTdm Administration](#), Collections tab, and select the collection that you are working with from the drop-down menu (your account may have access to more than one collection, so it is important that you select the correct one). Click change, and that collection will be loaded.



- 4) Click on Export to download the metadata for that collection.
- 5) On the Export Metadata screen, choose the Tab-delimited option, with [Return field names in first record] option checked. Click Next.

Export metadata

Choose the method used to export metadata.

Tab-delimited. Exports data as a tab-delimited text file.

Comma-separated

Return field names in first record

- 6) CONTENTdm will take a moment to pull up the tab-delimited file. If you are using Internet Explorer, right-click the link to the export.txt file and choose **Save Target As**, saving the file to the desired location on your computer. If you are using Firefox, right-click on the link to the file and choose **Save Link As**, saving the export.txt to the desired location on your computer.

Export successful

Right-click on the link and choose **Save Target As** to save the file.

[Tab-delimited text file](#) export.txt

- 7) Once the file has been saved to your computer, you will need to open it in Microsoft Excel in order to work with it. Right-click on it and choose [Open with→Microsoft Excel].
- 8) The file will open in Excel with the collection metadata field names in the top row.
- 9) Compare the *first 29* field names in your spreadsheet with the field names in the New York Heritage Metadata Template. If they do not match, you will need to contact your regional library council's digital services person for help.
- 10) If you are working with a collection that already has items in it, you will see the metadata for those items in the spreadsheet, in rows 2 and beyond. Remove this metadata before continuing by selecting those rows and deleting the contents. (See #2, second bullet point above.)
- 11) You will see seven extra field names in your exported metadata file that are not in the New York Heritage Metadata Template. These are:
- OCLC number
 - Date created
 - Date modified
 - Reference URL
 - CONTENTdm number
 - CONTENTdm file name
 - CONTENTdm file path
- 12) These seven fields are generated by CONTENTdm during the upload process and will be automatically populated with data when you upload your image or object. Leave the field headers in your Excel spreadsheet but do not enter any data into the fields.

13) Begin entering metadata into the spreadsheet by choosing an image to start with. For multiple, **single items**, the metadata for that image will go into the first empty row of the spreadsheet (Row 2, underneath the field name headers). For a **compound object**, the metadata for the parent record, or object record, will go in Row 2. Then the metadata for page 1 of that compound object will go in Row 3 and so on. You can have all your **single items** in one spreadsheet because there is no structure to them. However, you will need one spreadsheet for each **compound object** because there is a parent-child, or object-page, structural relationship within each compound object. In the File Name field for the parent/object record (Row 2 of a compound object spreadsheet), use index.cpd. This is the only exception to the unique file-naming rule. Every compound object in your collection will have index.cpd for File Name in the object record row. The actual file names for each page image will be the values for File Name in subsequent page-record rows.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Collection	Title	Item ID	Description	Collection	Alternate T	Date of Ori	Publisher	Creator	Contributor	Institution	Department	Subject
2													
3													
4													
5													

File Name column for single items

AA
File Name
tourgee14.tif
tourgee188.tif
tourgee470.tif
tourgee8566.tif
tourgee8953.tif
tourgee8992.tif
tourgee8993.tif

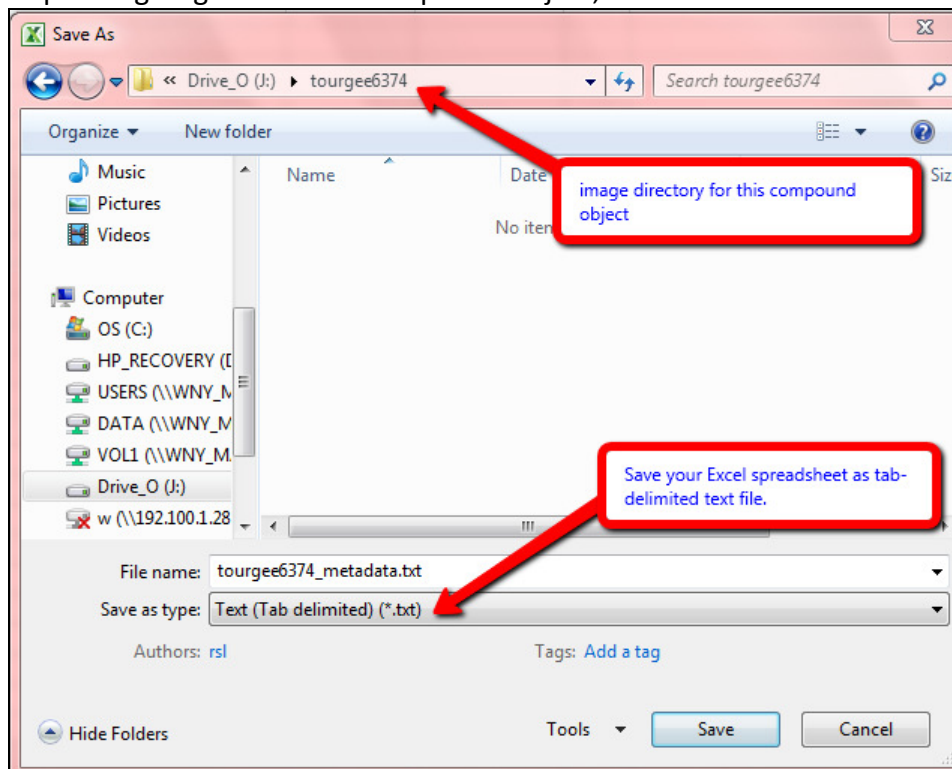
File Name column for compound object

Z
File Name
index.cpd
tourgee6374_Page01.tif
tourgee6374_Page02.tif

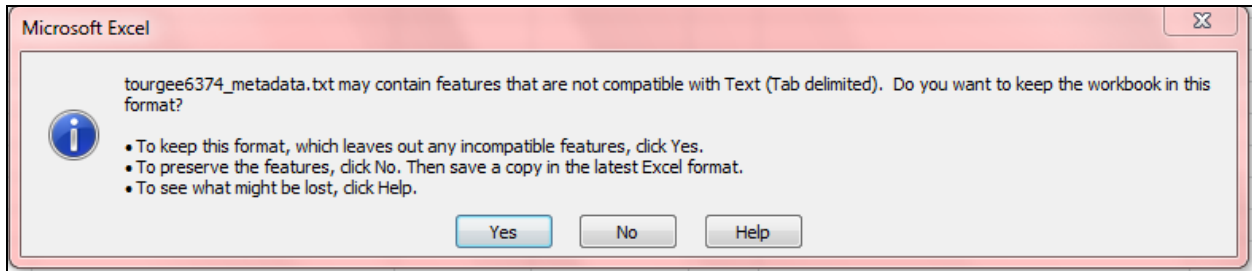
14) Much of the metadata that you enter will be constant, meaning that it will be repeated for each item that you are uploading. If you know that the data in a field will be repeated, you can copy the contents of the cell downward into all subsequent rows of metadata. (An alternative method that saves time is to use the Project Metadata Template, located in the Project Settings of the Project Client. See “Using templates in the Project Client to automate repeating metadata” training document for instructions.) Constant metadata fields may include but are not limited to:

- Collection ID
- Digital Collection
- Holding Institution
- Publisher of Digital
- Rights

- 15) It is important to enter accurate, error-free metadata into all appropriate fields. However, it is vital that the contents of the File Name field are accurate. The File Name field will help link the metadata in the spreadsheet with the appropriate image as you are uploading to CONTENTdm. The File Name field value must be the full file name, including file extension, i.e., XXXXX.tif. All file names within a collection must be completely unique from any other file name in that collection. (One way to guarantee this is to begin your file names with your Collection ID, i.e., VXU002_XXXX_00001.tif.)
- 16) When you have entered all the metadata into the template, with one row of metadata for each image for single items OR one row of metadata for the object record followed by one row of metadata for each page image of that compound object, you are ready to upload the images and metadata with the Project Client. Save your Excel files in a separate directory.
- 17) Once finished with editing your metadata in Excel, save that file in your image directory for the corresponding single items OR compound object, as a tab-delimited text file.

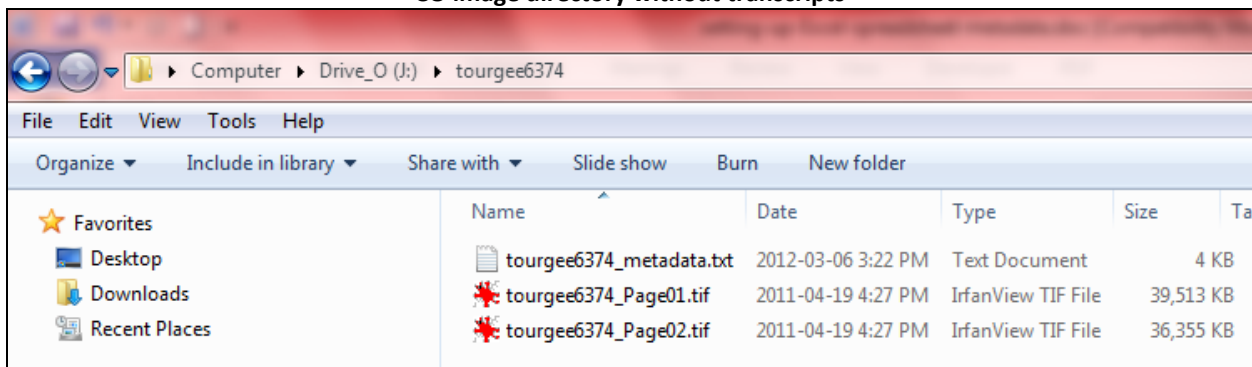


You will then see another dialog box: in Excel 2010, when you click Save, Excel will ask you if you want to save the spreadsheet as it is, or save it retaining the formatting. You do not want to retain the formatting of your Excel metadata file in your tab-delimited metadata file, so select [Yes] to save it without the formatting.

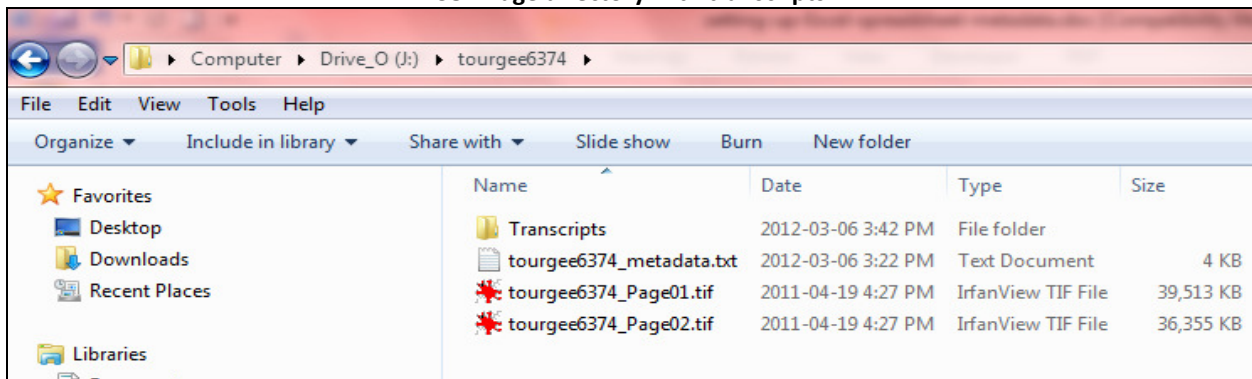


18) Your tab-delimited metadata text file can be saved in the same directory as the TIFF files that you are importing. (Additionally, if you are uploading transcripts, you will need a [Transcripts] directory inside the image directory. This works for both multiple single items and compound objects.) NOTE: The Excel versions of your metadata cannot be in the directory you're using to upload the single items or compound object (CO). Also, just as multiple single items can be in one metadata spreadsheet, all your single item images can be in one directory. Similarly, just as each compound object must have its own metadata spreadsheet, each compound object must have its own image directory.

CO image directory without transcripts



CO image directory with transcripts



19) Next, open your tab-delimited metadata text file. Press CTRL+End. Your cursor should be right after the last character of your metadata. If it is not, delete any extra white space in the text file until it is. Then press CTRL+H to bring up the “replace” dialog box. Replace all quotation marks with nothing in order to delete them with one step. Save and close.

20) You are now ready to upload your single items or compound object using the Project Client! Open the Project Client. If you haven't done so already, create a project for importing items into the desired collection. See Project Client documentation for uploading multiple single items or compound objects.