

# CONTENTdm User Guide

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## What is CONTENTdm?

CONTENTdm is a digital collection management software by OCLC that allows users to store and organize digital items, add metadata, and upload their collections to the Web.

[youtube [http://www.youtube.com/watch?v=otKpCqNna\\_A&w=630&h=472](http://www.youtube.com/watch?v=otKpCqNna_A&w=630&h=472)]

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## Definitions

**Project Client:** the desktop software in which items and metadata are entered and edited prior to upload to the online collection

**Item:** a file and the metadata associated with it

**Object:** an item (or group of items) that makes up a single work

**Compound Object:** multiple files that are displayed to the user as a single-work (ex: a book)

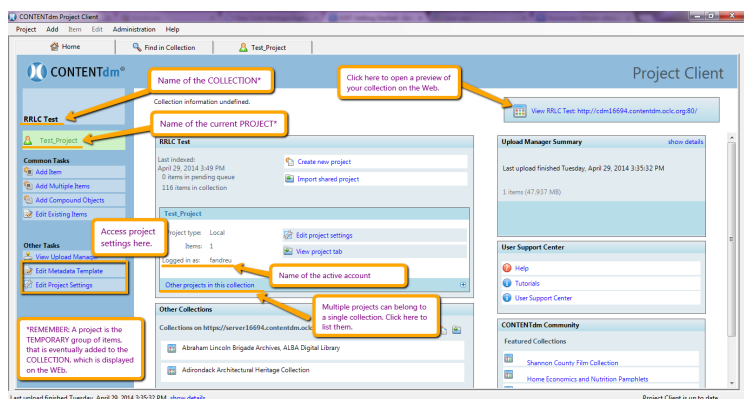
**Project:** a *temporary* group of items that is being edited. It only exists inside the Project Client

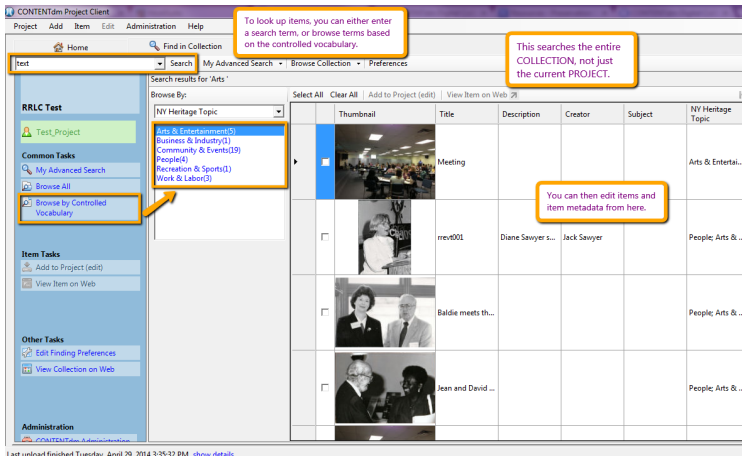
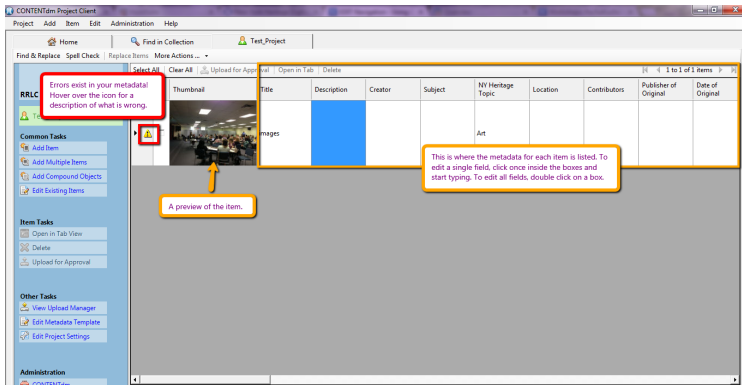
**Metadata Template:** a template created to assign consistent metadata to a project

**Digital Collection:** The overall group of items, usually representative of a single theme or source. Many already exist as a physical collection.

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## Navigation

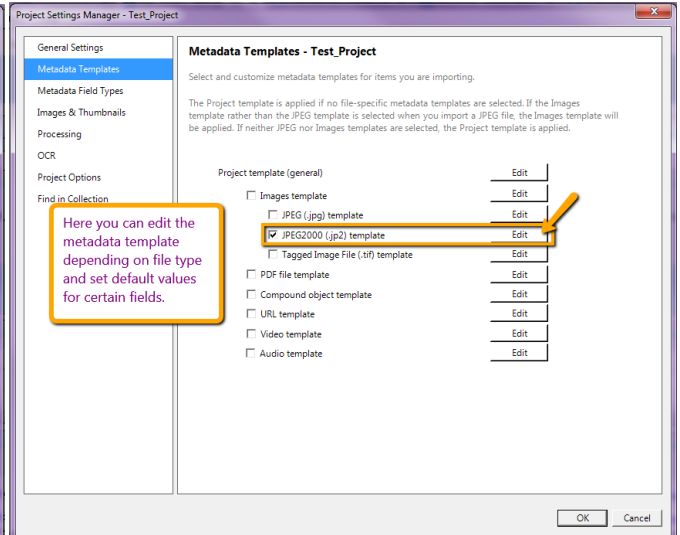
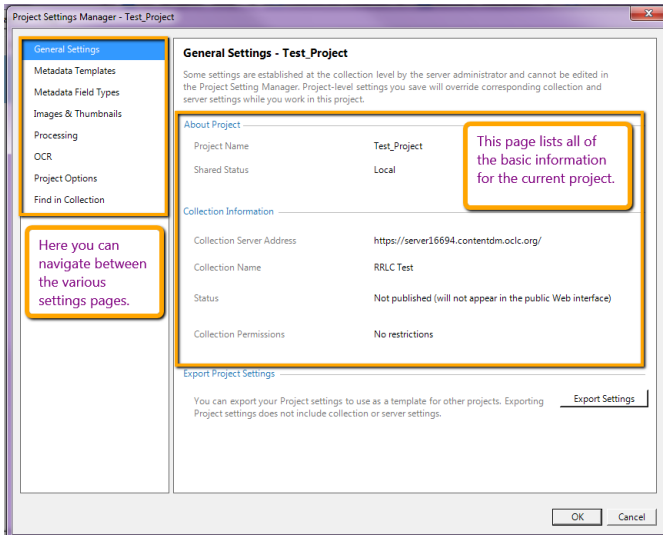


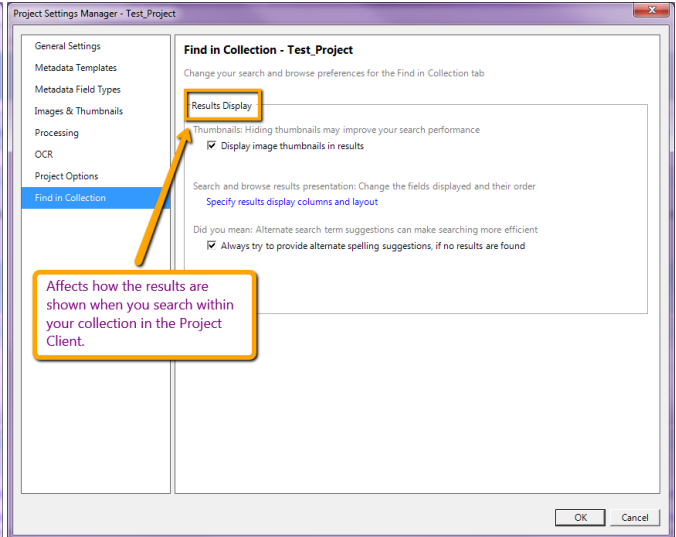
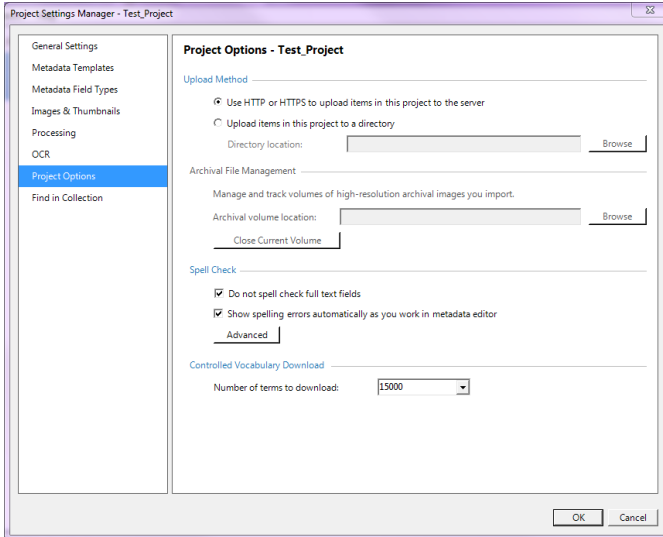
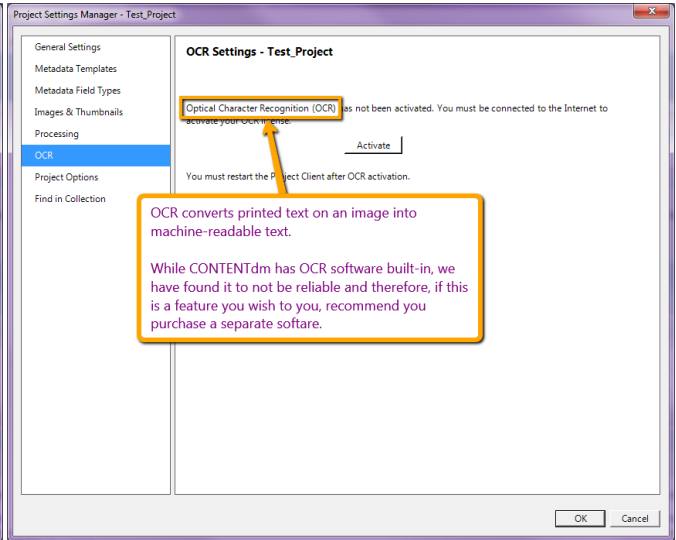
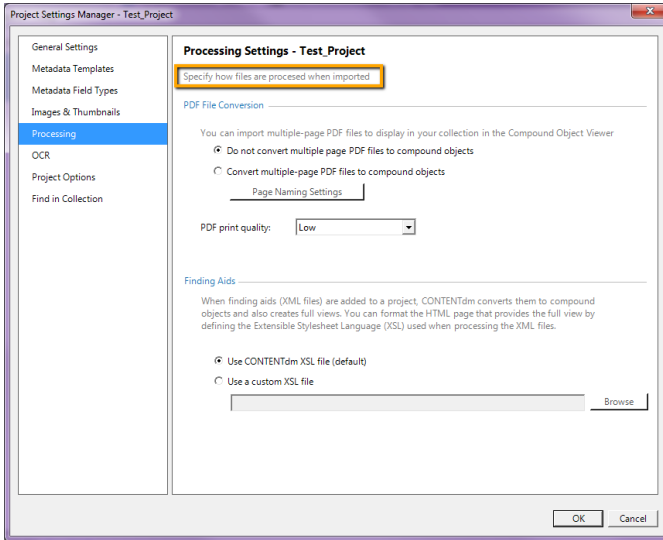
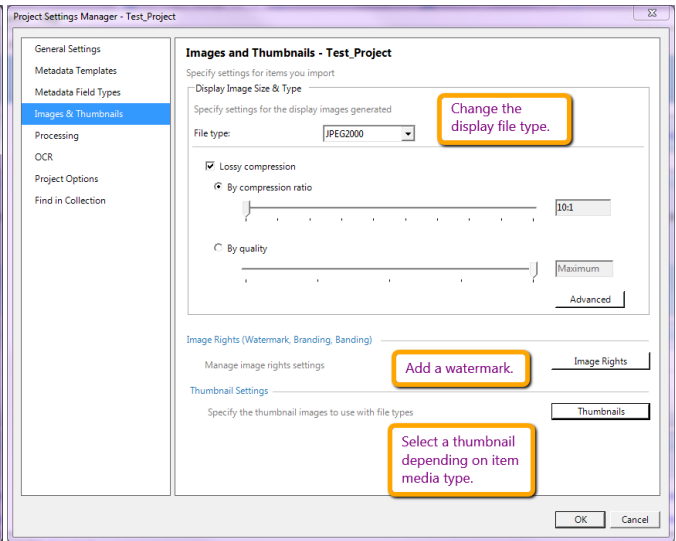
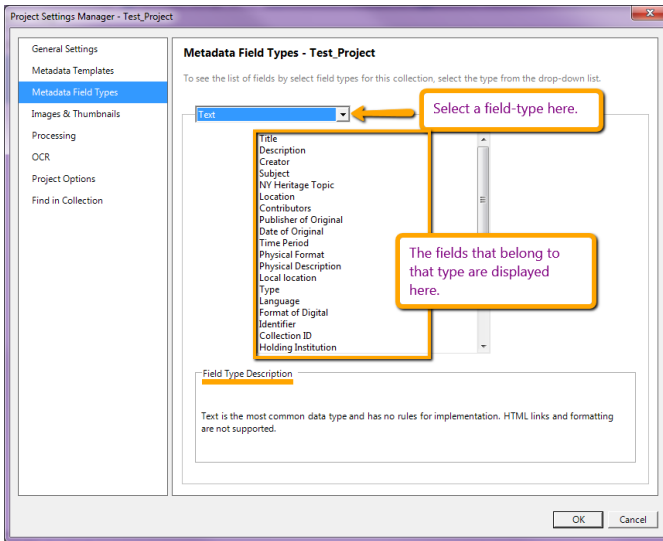


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## Project Settings

Click on an image to enlarge





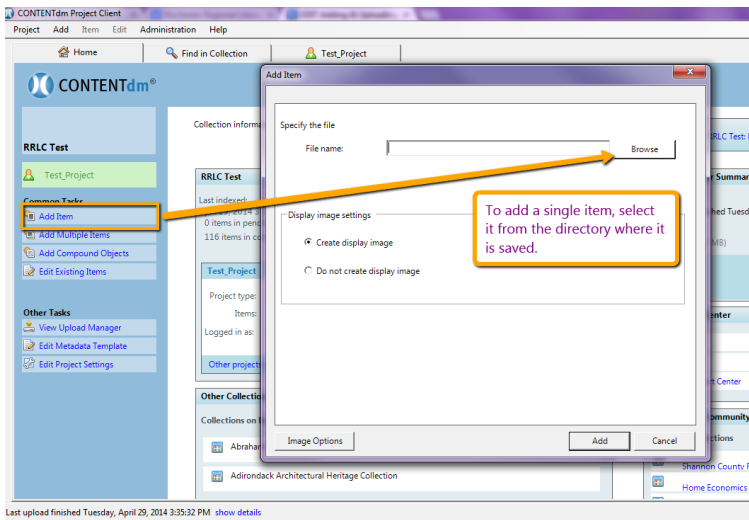
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## Adding & Uploading

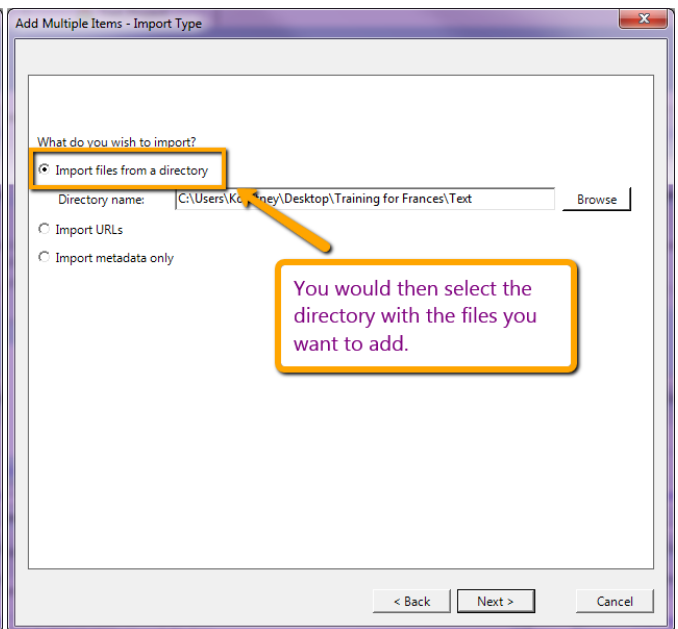
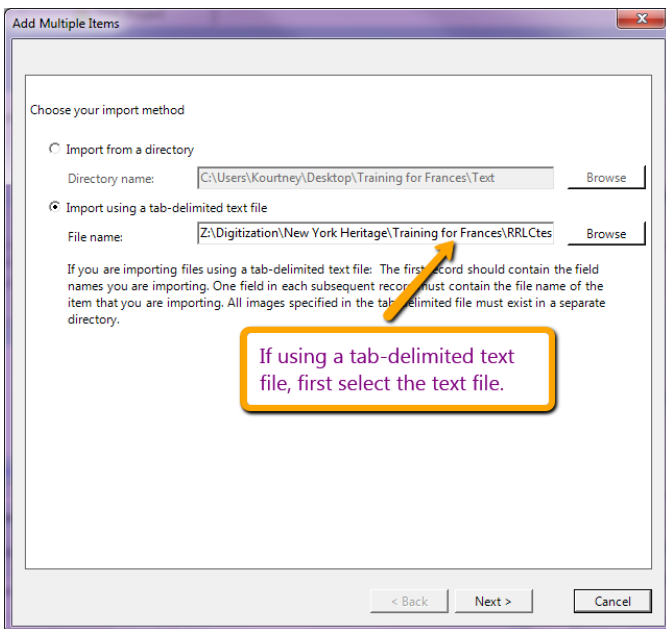
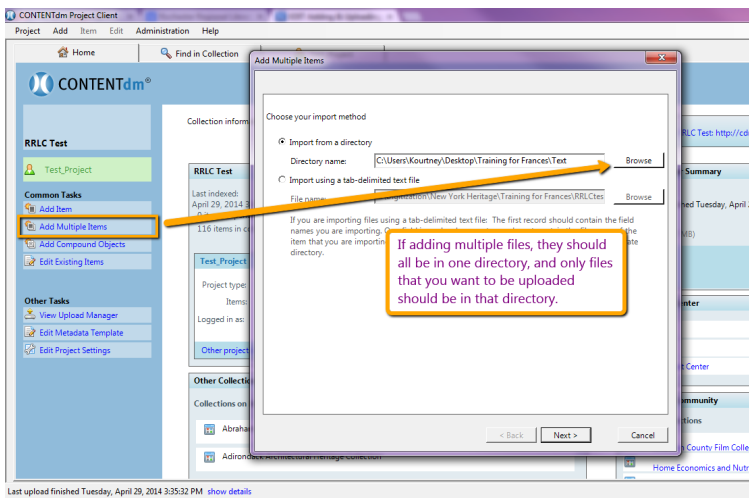
Adding Multiple Items

Adding Compound Objects

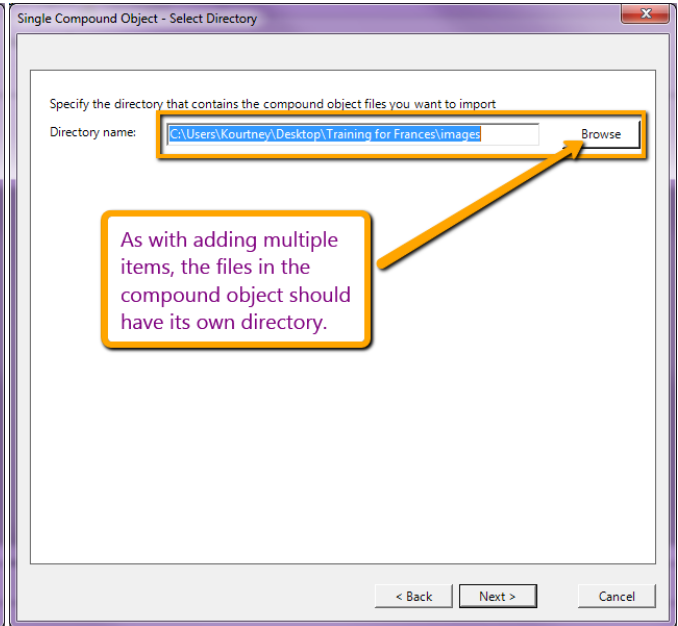
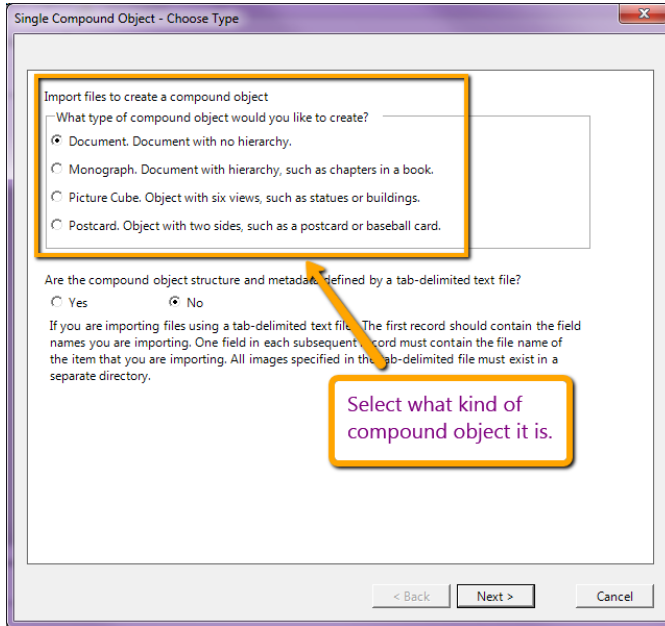
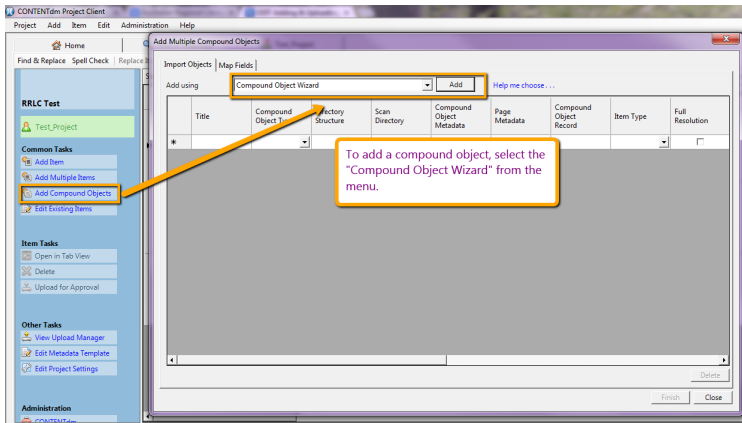
Uploading



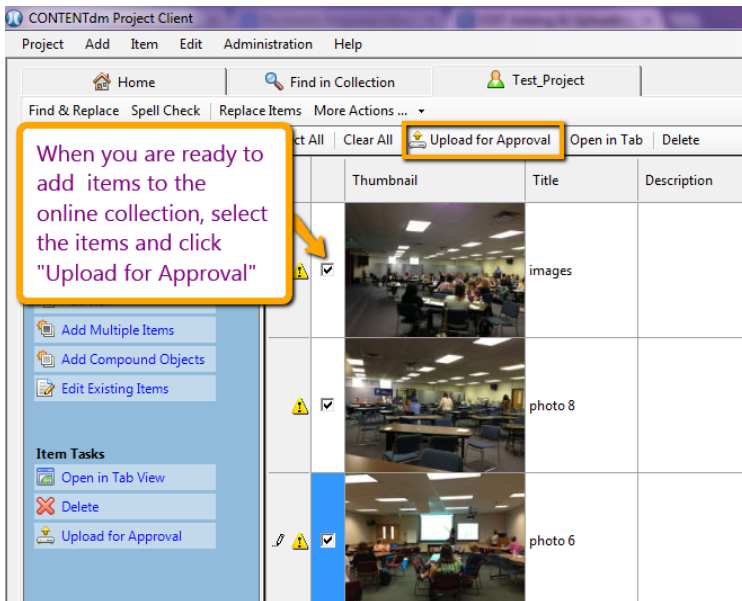
## Multiple Items



## Adding Compound Objects



## Uploading



NOTE: Items will not appear in the collection until they have been approved. Approvals are done through the Administration Web Client (See Administration)

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## Metadata

[Metadata Definitions](#)   [Adding Metadata](#)   [Controlled Vocabulary](#)

It is important that the metadata you use for each of your objects is as accurate and descriptive as possible—after all, this is how users will find items in your collection. Make sure to carefully follow the metadata guidelines laid out in the [New York Heritage Metadata Dictionary and Best Practices Guide](#).

### Metadata Definitions

Metadata	“Data about data”—the attributes or descriptors of an item
Metadata Template	a template that assigns consistent metadata to a project
Field	a unit of information that describes an aspect of an item
Controlled Vocabulary	a standardized set of terms

### Adding Metadata

To set default metadata values before you start adding items to the project:

Project Settings Manager - Test\_Project

**Metadata Templates - Test\_Project**

Select and customize metadata templates for items you are importing.

**JPEG 2000 Template**

To create a metadata template, select a property from the Default Type options and enter a value in the Default Value column.

Field Name	Default Type	Default Sub-type	Default Value
Title	Text		
Description	Text		
Creator	Text		
Subject	Text		
NY Heritage To...	Text		
Location	Text		
Contributors	Text		
Publisher of Ori...	Text		
Date of Original	Text		
Hidden Date	Date		
Time Period			
Physical Format	Text		
Physical Descrip...	Text		
Local location	Text		
Type	Text		
Language	Text		
Format of Digital	Text		

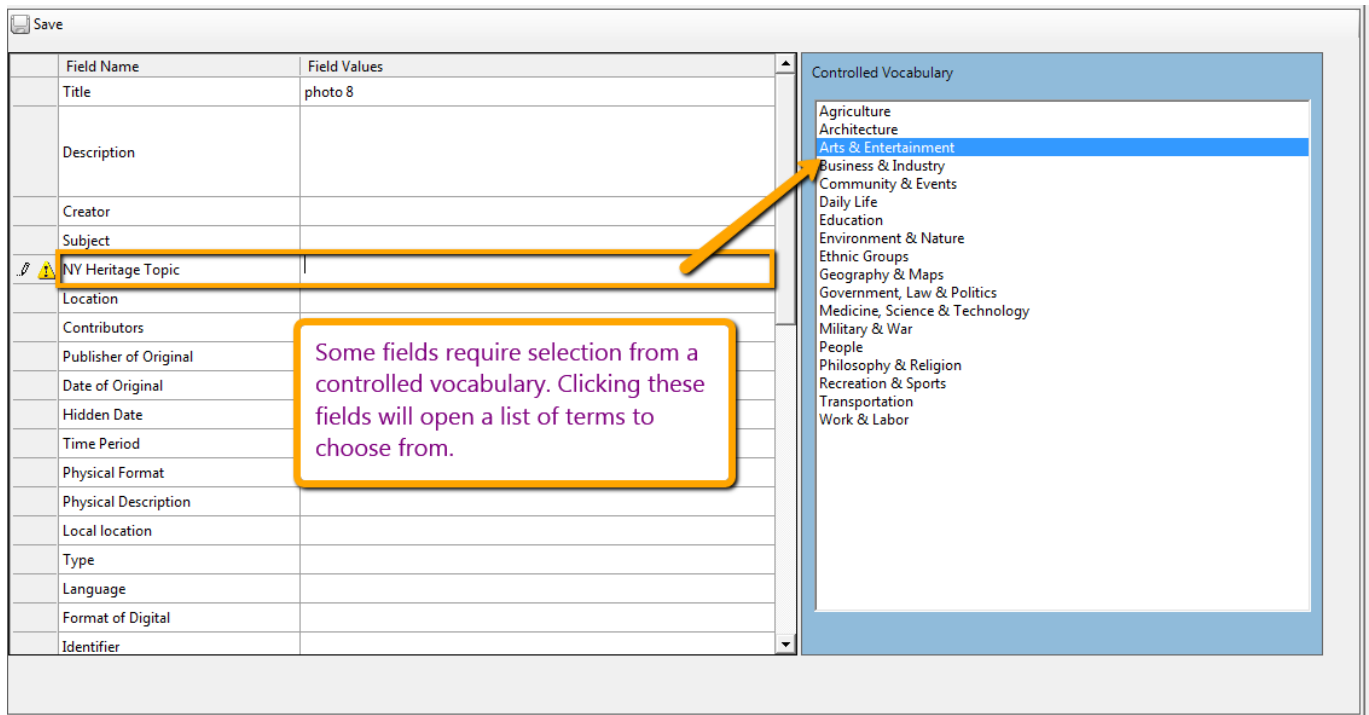
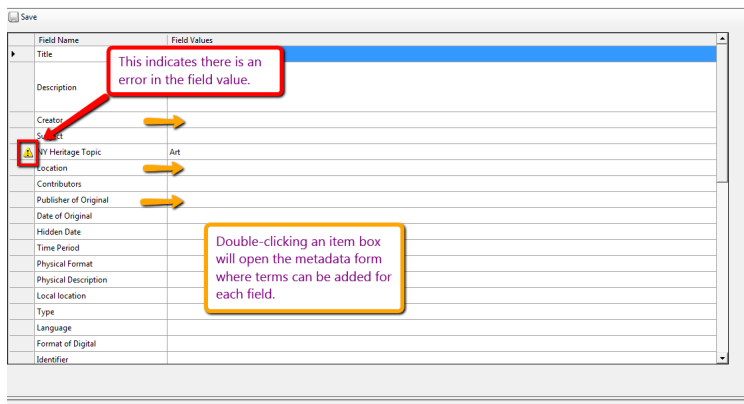
OK   Cancel

Select All   Clear All   Upload for Approval   Open in Tab   Delete   1 to 2 of 2 items

Thumbnail	Identifier	Collection ID	Holding Institution	Contact Information	Publisher of Digital	Date of Digital	Digital Collection	Library Council
		VRR003	Rochester Regional Library Council					Rochester Regional Library Council
		VRR003	Rochester Regional Library Council					Rochester Regional Library Council

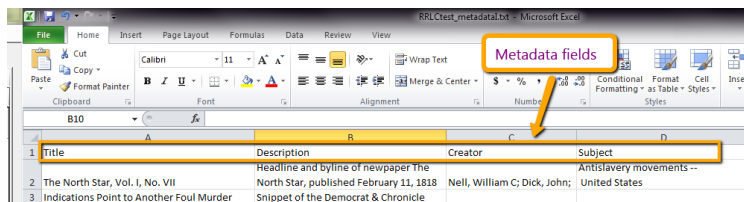
These values were automatically filled in when the item was added.

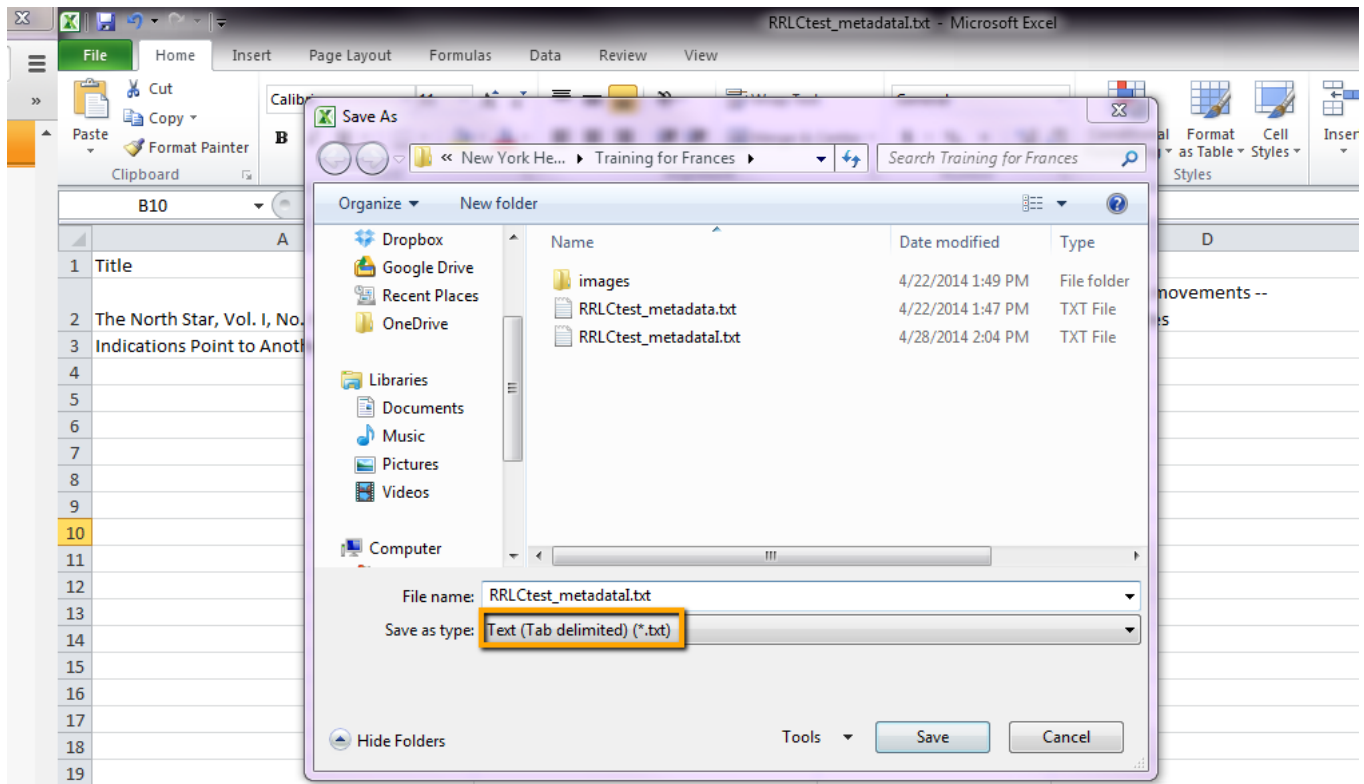
To add metadata after you have added an item to the project:



### Tab Delimited Files:

Metadata can be added for multiple items ahead of time using an Excel spreadsheet. After creating a column for each of the fields in Excel, fill in the metadata for each item and save the file type as "Text (Tab delimited)".





## Controlled Vocabulary

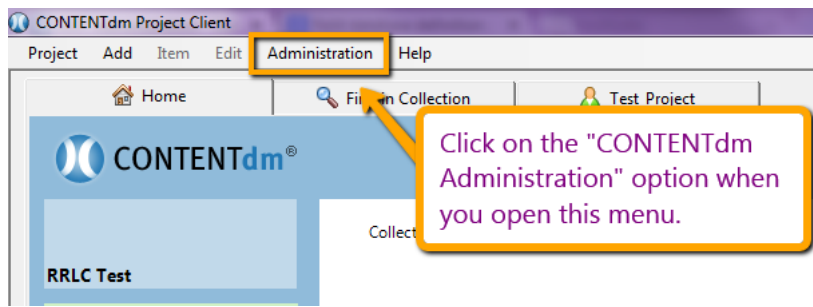
Usage	Links to Suggested Controlled Vocabularies
<p><b>Required Fields</b></p> <ul style="list-style-type: none"> <li>▪ Title</li> <li>▪ Collection ID</li> <li>▪ File Name</li> </ul> <p><b>Fields Requiring Controlled Vocabulary</b></p> <ul style="list-style-type: none"> <li>▪ NY Heritage Topic</li> <li>▪ Physical Format</li> <li>▪ Collection ID</li> <li>▪ Holding Institution</li> <li>▪ Digital Collection</li> <li>▪ Library Council</li> </ul> <p><b>Fields with Recommended Controlled Vocabulary</b></p> <ul style="list-style-type: none"> <li>▪ Creator</li> <li>▪ Subject</li> <li>▪ Location</li> <li>▪ Contributors</li> <li>▪ Publisher of Original</li> <li>▪ Hidden Date</li> <li>▪ Type</li> <li>▪ Language</li> <li>▪ Format of Digital</li> </ul>	<ul style="list-style-type: none"> <li>▪ <a href="#">Art &amp; Architecture Thesaurus</a> Appropriate for “Subject” field</li> <li>▪ <a href="#">Dublin Core Metadata Initiative Type Vocabulary</a> Appropriate for “Type” field</li> <li>▪ <a href="#">International Standard for Language Codes</a> Appropriate for “Language” field</li> <li>▪ <a href="#">Library of Congress Name Authority File</a> Appropriate for “Creator”, “Subject”, “Contributors”, and “Publisher of Original” fields</li> <li>▪ <a href="#">Library of Congress Subject Headings</a> Appropriate for “Subject” and “Location” fields</li> <li>▪ <a href="#">Medical Subject Headings</a> Appropriate for “Subject” field</li> <li>▪ <a href="#">Internet Media Types (IMT)</a> Appropriate for “Format of Digital” field</li> <li>▪ <a href="#">Thesaurus for Graphic Materials</a> Appropriate for “Subject” field</li> <li>▪ <a href="#">Thesaurus of Geographic Names</a> Appropriate for “Location” field</li> <li>▪ <a href="#">Union List of Artist Names</a> Appropriate for “Creator” and “Contributors” field</li> </ul>

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## Administration

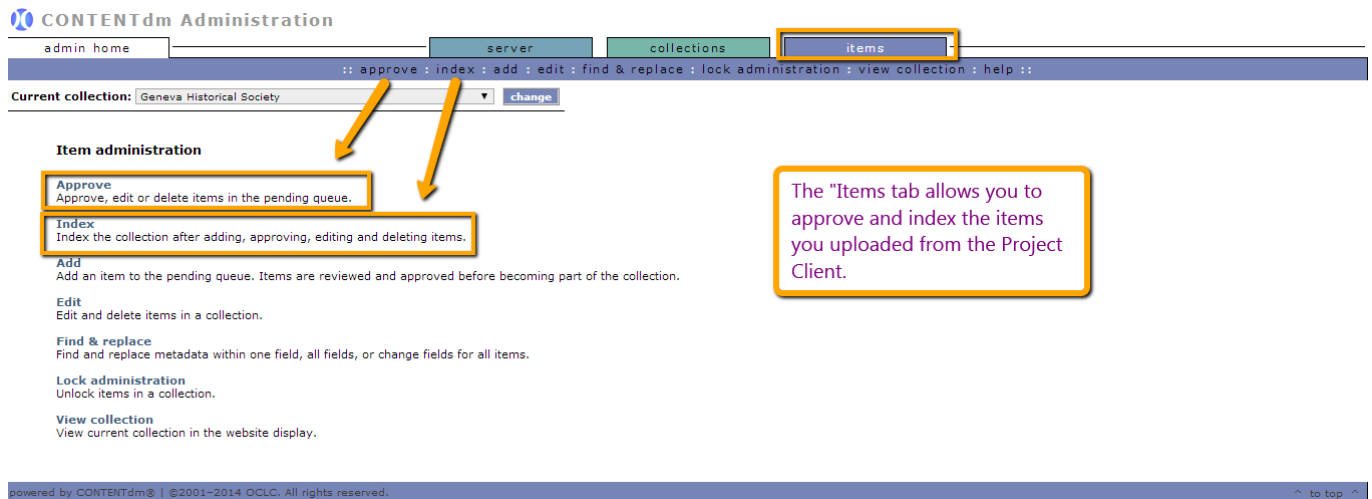


To access the Administration client, you will be leaving the Project Client and using your web browser.



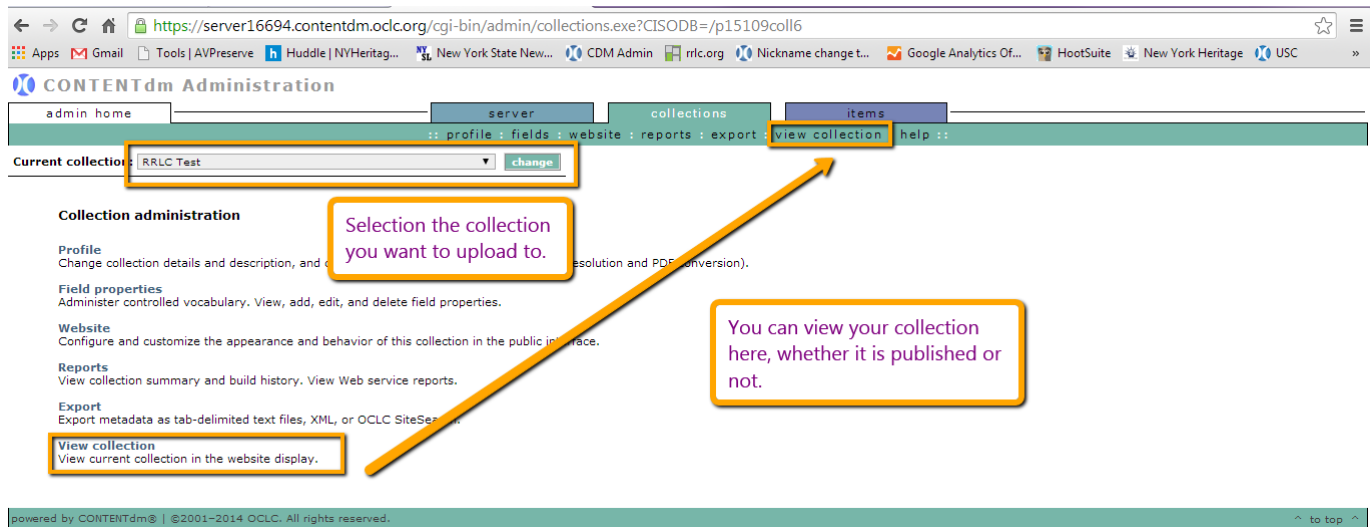
This will open the Administration webpage in your browser. You MUST be connected to the Internet. You will also have to use log in to access the page.

## Approving Items



After you have approved and indexed your items, they will be visible on the NY Heritage website.

## Viewing Your Collection



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## Editing Published Items

In order to edit collection items that have already been published, you must go through the Administration client.

Current collection: RRLC Test change

Item administration

**Approve**  
Approve, edit or delete items in the pending queue.

**Index**  
Index the collection after adding, approving, editing and deleting items.

**Add**  
Add an item to the pending queue. Items are reviewed and approved before becoming part of the collection.

**Edit**  
Edit and delete items in a collection.

**Find & replace**  
Find and replace metadata within one field, all fields, or change fields for all items.

**Lock administration**  
Unlock items in a collection.

**View collection**  
View current collection in the website display.

If you need to make edits to items after they've been published, select the "Edit" option from the "Items" menu.

Current collection: RRLC Test change

Edit

Browse or search for items you wish to edit, delete, export or add to compound objects.

Search: Across all fields | Selected fields | By proximity | By date

Find results

All of the words   
The exact phrase   
Any of the words   
None of the words

Display 50 results per page  
Sort by Title

search clear all

browse collection

You can either search for specific items to edit, or browse all the items in the collection.

Results: 192 items found



Global actions  
Caution: These actions affect all results. Deletion cannot be undone.  
delete all export all add all to compound object

Delete mode  
This setting determines how compound objects are deleted.  
 Delete compound object only  Delete compound object and its subpages


Here you can mass-delete items.


Selected operations


select all : clear all : delete : export : add to compound object page 1 of 4 : (<< 1 2 3 4 >>) : previous : next


	Image:	Title:	Subject:	Description:	
<input type="checkbox"/>		Adams, William H.	Judges	Oil on canvas portrait of the Honorable William H. Adams, 1841-1903	metadata delete
<input type="checkbox"/>		Angle, James L. 1 of 2	Judges	Black and white photograph of the Honorable James L. Angle, 1818-1891	metadata   delete


To change the metadata, click on the "Metadata" link.

46  Fahey, Eugene M. 1 of 2 Judges Cr

47  Fahey, Eugene M. 2 of 2 Judges Cr

48  Fahey, Eugene M. 3 of 2 Judges Cr

49  Fahey, Eugene M. 4 of 2 Judges Bl

50  Follett, David L. Judges Bl

select all : clear all : delete : export : **add to compound object**

To create compound items from exists items, select all the items you want to combine and click "add to compound object."

### Add compound object

Create a new compound object using selected items. View, rename, move, and delete items, or insert other items from the collection. Click **edit** to move an item or edit its title.

**Select compound object type**


- Document. Document with no hierarchy.
- Monograph. Document with hierarchy.
- Picture Cube. Object with six sides.
- Postcard. Object with two sides.

From this screen, you can edit each items existing metadata, otherwise it will remain the same as when it was first input. You can also rearrange the order it will appear in the compound object.

1	Folger, Charles J.	view   edit   delete	<b>Edit title</b>
2	Follett, David L.	view   edit   delete	Click edit to select an item.
			<b>Move item</b>
			Click edit to select an item.

**Insert item**

page 1 of 10 : ( << 1 2 3 4 5 6 7 8 9 10 >> ) :: previous : Next

Image:	Title:	Position:
	Adams, William H.	insert

You can add more items from here.

**Insert item into position**

Click insert to select an item.

cancel next

### Add compound object metadata

Enter metadata and then click **save changes**. You must enter a title.

\* Fields marked with an asterisk are required.

From the next screen, you will be able to add metadata for the compound object as a whole.

Title *	<input type="text"/>	
Description	<input type="text"/>	
Creator	<input type="text"/>	
Subject	<input type="text"/>	controlled vocabulary
NY Heritage Topic	<input type="text"/>	shared controlled vocabulary
Location	<input type="text"/>	
Contributors	<input type="text"/>	
Publisher of Original	<input type="text"/>	
Date of Original	<input type="text"/>	
Hidden Date	<input type="text"/>	
Time Period	<input type="text"/>	shared controlled vocabulary

When you've finished all of your edits, click "Save Changes." In order to update the NYHeritage website, you MUST index the collection again.

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## Speak Your Mind

You must be [logged in](#) to post a comment.