

CONTENTdm

# CONTENTdm Basic Skills 1: Getting Started with CONTENTdm

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# Agenda

- Visit CONTENTdm Collections
- Building a Collection
  - Add a collection
  - Configure a collection
  - Create a project
  - Configure a project
  - Add digital items & objects
  - Approve items & index collection

# CONTENTdm System Architecture

Images and metadata are added here

Images and metadata are stored and managed here

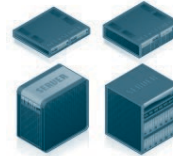
Images are discovered here



Project Client Software



CONTENTdm Server



CONTENTdm Administration  
Web-based Editor  
Web-based ADD  
Digital Collection Gateway



CONTENTdm (End-user) Website



WorldCat Discovery  
WorldCat.org  
Google, etc.  
Archival repositories



# CONTENTdm Terminologies

- What is a ***collection***?
  - A **collection** resides on the CONTENTdm server and shares a common metadata schema
- What is a ***project***?
  - A **project** is working space within the Project Client; resides on your workstation





# Build a Collection – Six Basic Steps

1. Add a collection
2. Configure a collection
3. Create a project
4. Configure a project
5. Add and upload the digital items
6. Approve and Index

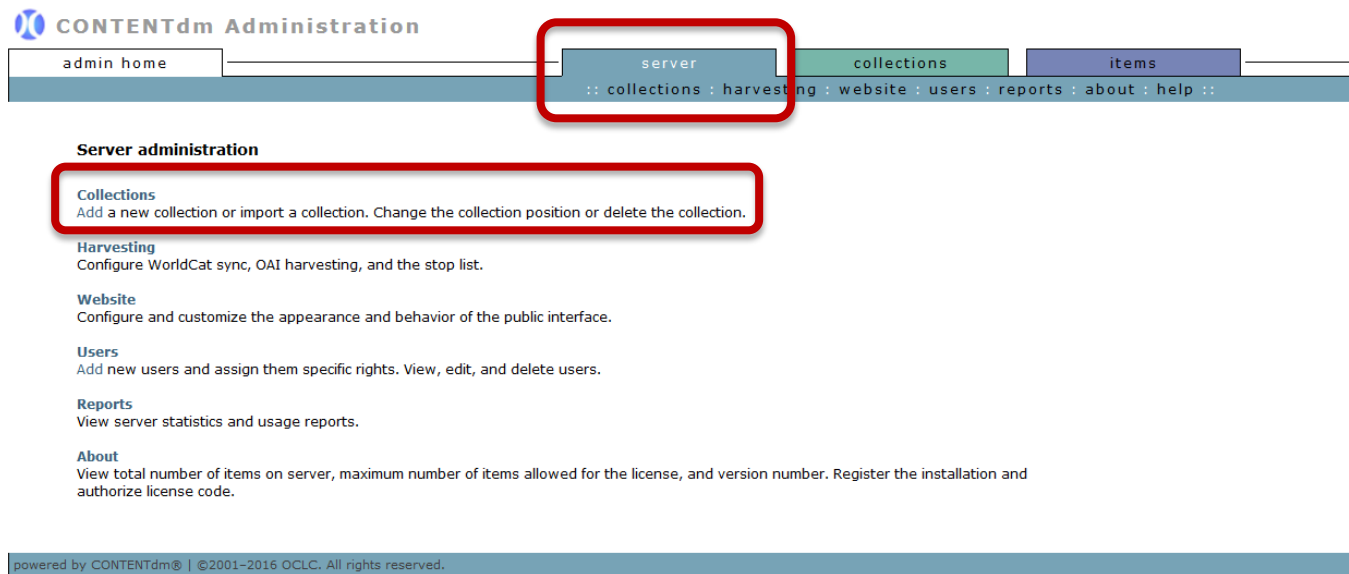
**CONTENTdm Administrator /  
Collection Administrator**

**Project  
Client  
Operators**

**CONTENTdm Administrator /  
Collection Administrator**

# Step 1 – Add a collection

Creation of the collection happens at the **Server** tab of the **CONTENTdm Administration** module



The screenshot displays the CONTENTdm Administration interface. At the top left is the logo and text "CONTENTdm Administration". Below this is a navigation bar with tabs: "admin home", "server", "collections", and "items". The "server" tab is highlighted with a red box. Below the navigation bar is a secondary menu with links: ":: collections : harvesting : website : users : reports : about : help ::". The "collections" link in this menu is also highlighted with a red box. Below the navigation bar, the "Server administration" section is visible. Under this section, the "Collections" sub-tab is highlighted with a red box. The "Collections" sub-tab contains the text: "Add a new collection or import a collection. Change the collection position or delete the collection." Other sub-tabs listed include "Harvesting", "Website", "Users", "Reports", and "About", each with a brief description of its function.

**CONTENTdm Administration**

admin home   server   collections   items

:: collections : harvesting : website : users : reports : about : help ::

**Server administration**

**Collections**  
Add a new collection or import a collection. Change the collection position or delete the collection.

**Harvesting**  
Configure WorldCat sync, OAI harvesting, and the stop list.

**Website**  
Configure and customize the appearance and behavior of the public interface.

**Users**  
Add new users and assign them specific rights. View, edit, and delete users.

**Reports**  
View server statistics and usage reports.

**About**  
View total number of items on server, maximum number of items allowed for the license, and version number. Register the installation and authorize license code.

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# Step 1 – Add a collection, cont.

## Collections

Add, move, configure, or delete collections.



1. Click **add collection**
2. Provide a **collection name**
3. Provide a **collection alias**
4. Click **add** button to add the new collection

## Add collection

Collection is the basic component of your CONTENTdm site. It contains your digital files and accompanying metadata.

After adding a collection, you can manipulate its field properties and modify its access permissions, PDF conversion settings, and display image settings. Use the Website Configuration Tool to configure appearance and behavior of the collection for your CONTENTdm site.

\* Fields marked with an asterisk are required.

Create a new collection using Simple Dublin Core

Collection name\*

Collection alias\*  (This is the system generated alias. See instructions below for custom alias)

1. Collection alias is used in the URL as a unique collection identifier. For example, 'odcsample' is the alias for this collection: <https://cdmdemo.contentdm.oclc.org/digital/collection/odcsample>.  
2. The collection alias cannot be modified once the collection has been created.  
3. The collection alias can only contain alphanumeric characters (a-z and 0-9) and the '-' (hyphen) and '\_' (underscore) characters.  
4. The collection alias must start with a letter (a-z).  
5. The collection alias must not exceed 13 characters in length.  
6. The collection alias can contain lowercase and uppercase characters and it is case-sensitive. For example, you can use 'VanGogh' as a collection alias but be aware that requests for 'https://yoursitedomain/digital/collection/vangogh' will then result in an error because the letter case does not match.

# Step 2 – Configure a collection

## Configurations happen in the *Collections* tab

- Name (or rename) the collection
- Establish the collection status
- Permissions to access the collection
- Describe the collection

**Collection configuration**

View and edit the collection profile and settings, including PDF conversion, display image settings, archival file management and image rights. To view and configure the metadata fields for this collection (and to enable full text searching), see fields.

Profile & permissions		edit
Collection name	Sample UW Photo Collection	
Collection alias	/p12012uw	
Directory name	\\cdmprod.cdm.oclc.org/Sites\$/train/12012/Data/p12012uw	
Collection status	Published	

**Permissions**

User name	
IP address	
Require permissions	For metadata and items

**Collection information**

Collection information is displayed in the Project Client to help different users of the system distinguish between the collections.

Collection information undefined.

**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	Do not generate display images from full resolution images.	edit
Archival file manager	Do not save files to an archive volume location	edit
Image rights	No image rights options available for Web imports (create in the Project Client)	

# Configure a Collection—Optional Settings

## Optional collection settings summary

Click **edit** to review and change the complete settings for each.

<b>PDF conversion</b>	Do not convert multiple-page PDF files to compound objects	<a href="#">edit</a>
<b>Display image settings</b>	Do not generate display images from full resolution images.	<a href="#">edit</a>
<b>Archival file manager</b>	Do not save files to an archive volume location	<a href="#">edit</a>
<b>Image rights</b>	No image rights options available for Web imports (create in the Project Client)	

# Configure a Collection—Metadata Fields

**Establish the Field Properties**—Decide which Dublin Core elements will be used for the collection and then configure the elements

- **Field Name**—choose field names that reflect the contents of your collection
- **Dublin Core Mapping**—Determines which field in the Dublin Core element set that the field maps to
- **Data Type**—Text, Date, Full Text Search

# Data Type—Date

<b>Supported formats</b>	<ul style="list-style-type: none"><li>• yyyy-mm-dd</li><li>• yyyy-mm</li><li>• yyyy</li><li>• mm/dd/yyyy</li><li>• mm/yyyy</li><li>• yyyy-yyyy</li></ul>
<b>Supported delimiter between dates</b>	<ul style="list-style-type: none"><li>• comma (,)</li><li>• semi-colon (;)</li></ul>
<b>Supported delimiter in date range</b>	<ul style="list-style-type: none"><li>• hyphen (-)</li></ul>
<b>Multiple dates (space not required)</b>	<ul style="list-style-type: none"><li>• yyyy; yyyy; yyyy</li><li>• yyyy;yyyy;yyyy</li></ul>

# Metadata Fields—Field Settings

## 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

- **Large Field**—Will this field display in single line or multi-line text box?
- **Search**—Will this field be indexed for searching?
- **Hide**—Will this field be hidden from public website
- **Required**—Can this field be empty?
- **Vocabulary**—Will the field use a controlled vocabulary?

# Metadata Fields—Controlled Vocabulary

**Select and share controlled vocabulary**

Create a new controlled vocabulary for this field

Use  [view thesaurus]

Use the existing contents of the field

Import vocabulary from a file on the server.  
File must contain one term per line.  
Specify the complete path of the file on the server, such as D:\server\data/file.txt

Share this controlled vocabulary across other fields and collections.  
(**Caution:** Sharing the controlled vocabulary means that it can be edited in other collections.)

Name shared vocabulary

Do not share this controlled vocabulary

Use a controlled vocabulary from another field or collection

Create a new controlled vocabulary for this field

Use  [view thesaurus]

Use

Use

Use

Import

File

Spec

# Add a Collection

## Project Description

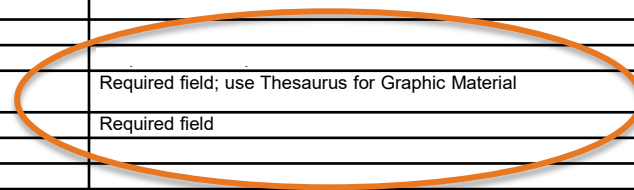
The Library has borrowed ancestral photographs, and letters from patrons in order to build a community-wide online collection.





# Metadata Style Guide – An Example

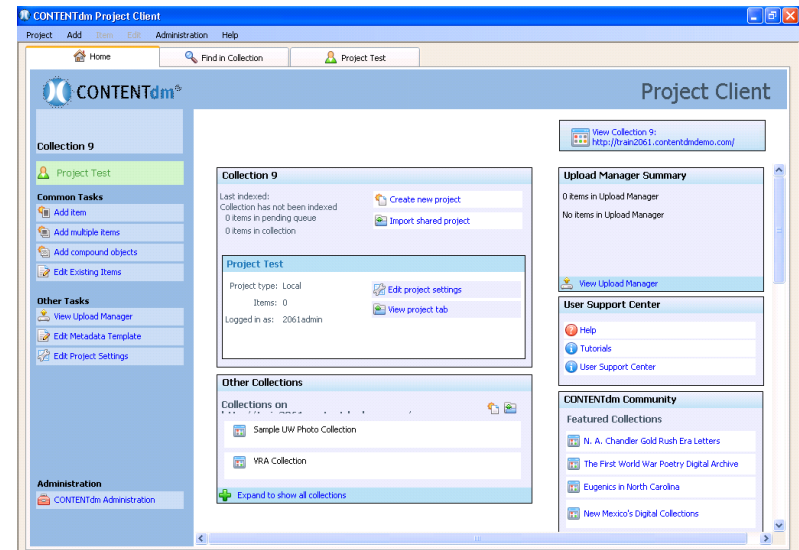
Recommended Discovery Metadata	Guidelines
Element Name: Contributor	
Element Name: Coverage	
Element Name: Creator	<p>If no creator can be determined, leave blank.</p> <p>If the creator is not known, you may enter creator unknown in the Description element.</p> <p>Enter last name, first name. Creator entries should follow an authority file, if available, such as the Library of Congress Name Authority (<a href="http://authorities.loc.gov/">http://authorities.loc.gov/</a>).</p> <p>If an item has more than one creator, enter names in the same creator field separated by a semi-colon and a space.</p>
Element Name: Date	
Element Name: Description	
Element Name: Format	
Element Name: Identifier	
Element Name: Language	
Element Name: Publisher	
Element Name: Relation	
Element Name: Rights	
Element Name: Source	
Element Name: Subject	Required field; use Thesaurus for Graphic Material
Element Name: Title	Required field
Element Name: Type	
Element Name: Audience	
<b>Recommended Non Dublin Core Elements</b>	
<b>Element Name: Cataloged By</b>	
<b>Element Name: Notes</b>	





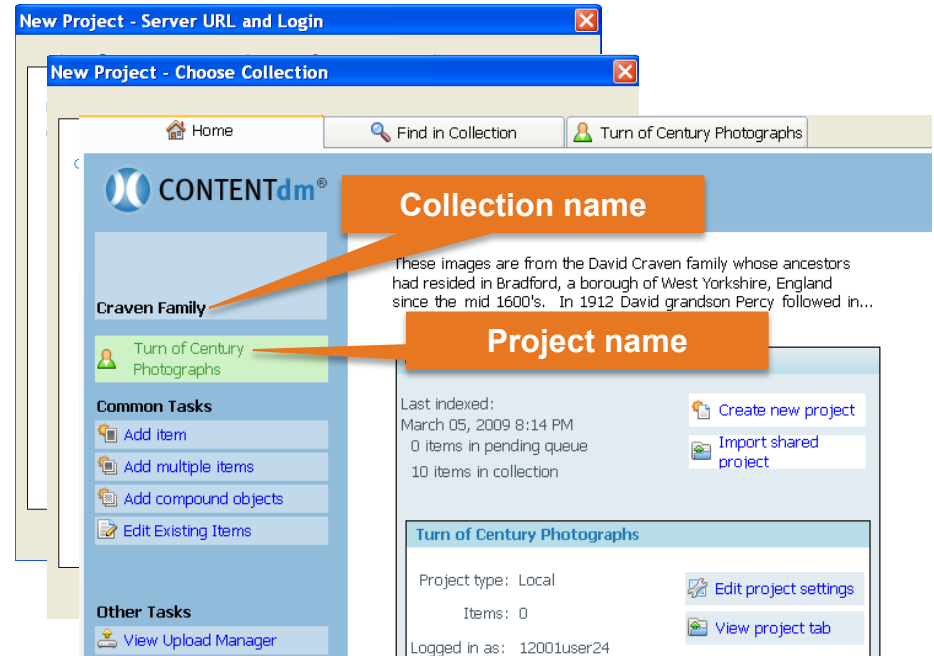
# Project Client

- Windows-based software that resides on workstation
- Create and work with projects



# Step 3 – Create a Project

- Enter the server address; requires user name and password
- Choose your collection
- Give your project a unique name



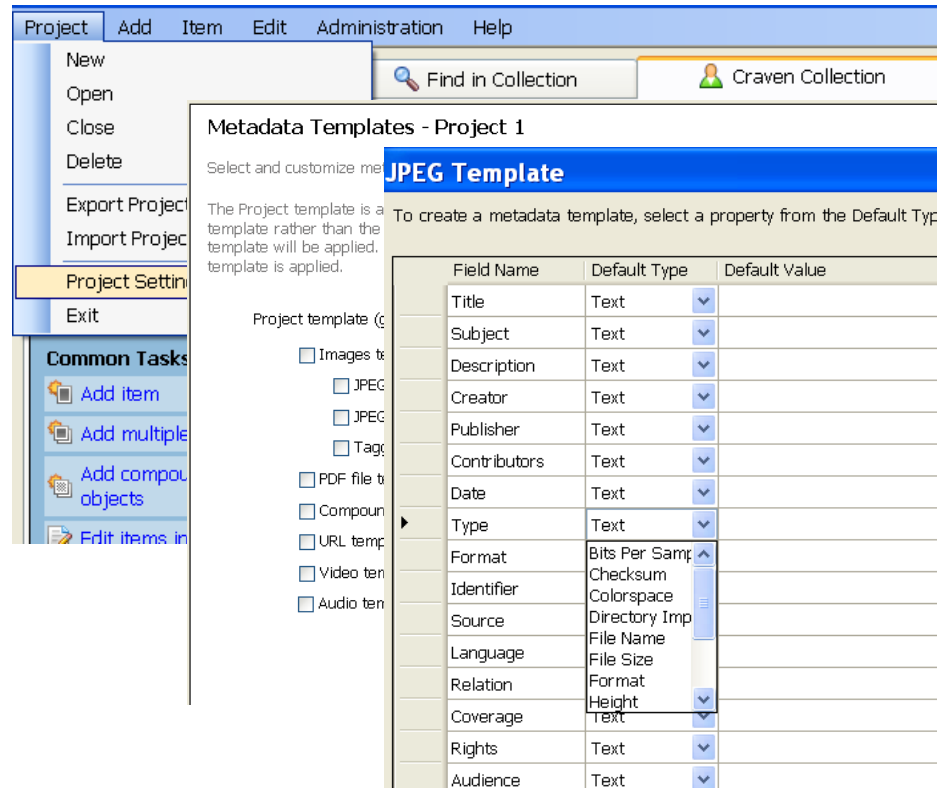
# Step 4 – Configure a Project

## Template Types

- General project
- Specific item or object types
- Specific image file types

## Advantages

- Automatically add descriptive metadata
- Extract technical information from image

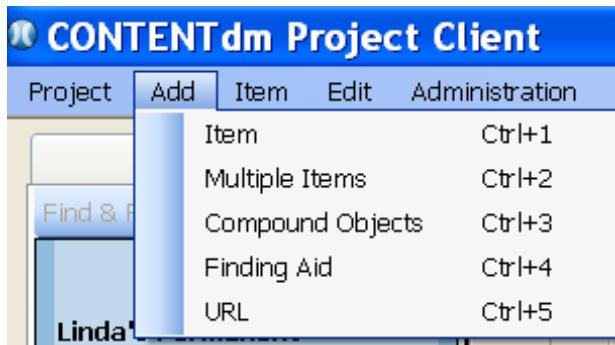


The screenshot shows the 'Metadata Templates - Project 1' dialog box. The 'JPEG Template' is selected. The dialog box contains a table with the following columns: Field Name, Default Type, and Default Value. The table lists various metadata fields and their corresponding default types.

Field Name	Default Type	Default Value
Title	Text	
Subject	Text	
Description	Text	
Creator	Text	
Publisher	Text	
Contributors	Text	
Date	Text	
Type	Text	
Format	Bits Per Samp	
Identifier	Checksum	
Source	Colorspace	
Language	Directory Imp	
Relation	File Name	
Coverage	File Size	
Rights	Format	
Audience	Height	



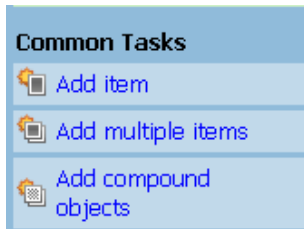
# Step 5 – Add Digital Items



Options for importing include:

- Single Item
- Multiple Items in a Single Directory
- Compound Object(s)
- Finding Aid
- URL

OR



# Entering Metadata for Digital Items

The screenshot shows a web interface for managing digital items. At the top, there is a search bar labeled "Find in Collection" and a user profile icon labeled "Craven Collection". Below this is a toolbar with options: "Replace Items", "More Actions ...", "Select All", "Clear All", "Upload for Approval", "Open in Tab", and "Delete". A status bar indicates "1 to 4 of 4 items".

	Thumbnail	Title	Subject	Description	Creator	Publisher
<input checked="" type="checkbox"/>		Sarah_Pearson_12				
<input type="checkbox"/>		Sarah_Pearson_14				
<input type="checkbox"/>		Sarah_Pearson_16				
<input type="checkbox"/>		Sarah_Pearson_adult				

A "Save" dialog box is open, displaying the following metadata fields and values:

Field Name	Field Values
Title	Sarah_Pearson_12
Subject	
Description	98114180 Bytes
Creator	Craven Collection
Publisher	OCLC Western
Contributors	OCLC\stewartl
Date	
Type	
Format	
Identifier	
Source	Sarah_Pearson_12.tif
Language	
Relation	
Coverage	
Rights	
Audience	
Full resolution	
OCLC number	



# Entering Metadata—Controlled Vocabulary

Save

Field Name	Field Values
Title	Sarah_Pearson_12
Subject	
Description	98114180 Bytes
Creator	Craven Collection
⚠ Publisher	OCLC Western
⚠ Contributors	OCLC\stewartl
Date	
Type	
Format	
Identifier	
⚠ Source	Sarah_Pearson_12.tif
Language	
Relation	
Coverage	
Rights	
Audience	
Full resolution	
OCLC number	
Date created	
Date modified	

Controlled Vocabulary

- 4-H clubs
- A la poupée prints
- A trois crayons drawings
- A-frame buildings
- Abacus
- Abandoned buildings
- Abandoned children
- Abandoned farms
- Abandoned mines
- Abbeys
- Abdication
- Ablution fountains
- Abolition movement
- Abolitionists

OCLC Terminologies Services

Controlled vocabularies


# Step 5 – Upload Items for Approval

The screenshot shows a web interface for managing a collection. At the top, there are navigation links: Home, Find in Collection, and Craven Photos. Below these are utility links: Find & Replace, Spell Check, Replace Items, and More Actions. A toolbar contains buttons for Select All, Clear All, Upload for Approval (circled in orange), Open in Tab, and Delete. The main area is a table with columns for Thumbnail, Title, Subject, Description, and Creator. Three items are listed, each with a checked checkbox in the first column. A sidebar on the left contains sections for 'Linda's Permanent Collection', 'Craven Photos', 'Common Tasks' (Add item, Add multiple items, Add compound objects, Edit items in collection), and 'Item Tasks' (Open in tab view, Delete, Upload for approval).

	Thumbnail	Title	Subject	Description	Creator
<input checked="" type="checkbox"/>		Emma_Hardy_b.1846			Craven Family Collection
<input checked="" type="checkbox"/>		Annie_Craven_1869			Craven Family Collection
<input checked="" type="checkbox"/>		Lillie_Hardy_&_Friends			Craven Family Collection



# Step 6 – Approve Items

 **CONTENTdm Administration**

[admin home](#) [server](#) [collections](#) [items](#)

[:: approve](#) [: index](#) [: add](#) [: edit](#) [: find & replace](#) [: lock administration](#) [: view collection](#) [: help](#) ::

Current collection:  [change](#)

### Approve items

Approve all items in the pending queue or review the detailed approval queue actions to approve items individually or to add terms to the controlled vocabulary.

To schedule an approval process, click **add**.

#### Full approval queue actions

<b>Now: 6 pending item(s), 1 controlled vocabulary terms</b>	<b>Scheduled approvals – pending</b> <a href="#">add</a>
<input checked="" type="radio"/> Approve all (Records with unauthorized terms are approved but terms are not added to the controlled vocabulary.)	<div style="text-align: center; border: 1px solid gray; padding: 10px; background-color: #f0f0f0;">No approvals scheduled</div>
<input type="radio"/> Approve & index all	
<input type="radio"/> Delete all Warning: This cannot be undone.	
<a href="#">go</a>	

#### Detailed approval queue actions

<b>Controlled vocabulary</b> <a href="#">add all</a>
<b>Subject field</b>
girl <a href="#">add</a>   <a href="#">edit</a>

**Reviewing 6 of 6 pending item(s)**

Before reviewing items, you should review the unauthorized control vocabulary terms above.

**\* Items marked with and asterisk contain unauthorized controlled vocabulary terms.**

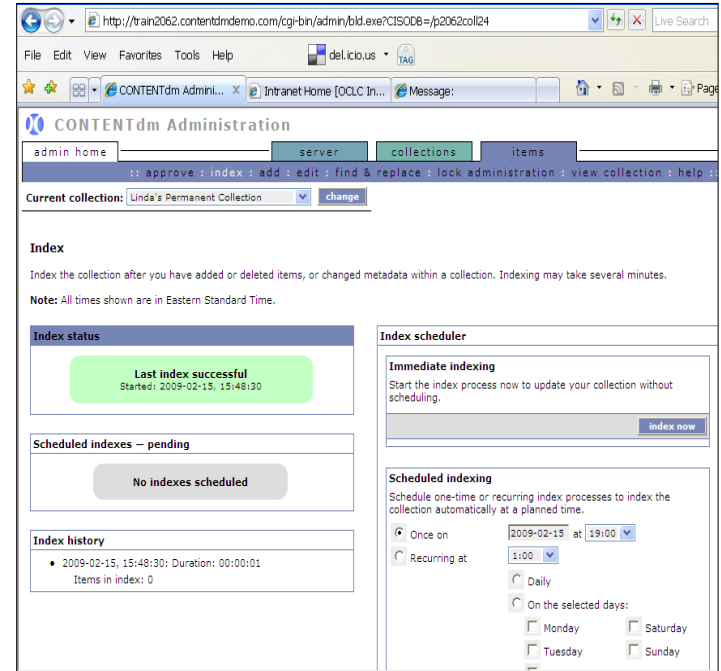
[approve](#) [delete](#)

select: all 6 | none

<input type="checkbox"/>	Annie_Craven_1869	<a href="#">edit</a>
<input type="checkbox"/>	* Annie_Craven_1869	<a href="#">edit</a>
<input type="checkbox"/>	Linda&Cheryl	<a href="#">edit</a>
<input type="checkbox"/>	Linda&Cheryl	<a href="#">edit</a>

# Step 6 – Index the Collection

- Necessary for the digital items to be available for browsing or searching
- As with approval, indexing can be done immediately or scheduled



The screenshot displays the CONTENTdm Administration web interface. The browser address bar shows the URL: `http://train2062.contentdmdemo.com/cgi-bin/admin/bld.exe?CISODB=fp2062coll24`. The page title is "CONTENTdm Administration". The navigation menu includes "admin home", "server", "collections", and "items". The "collections" tab is active, and the "Current collection" is set to "Linda's Permanent Collection".

The main content area is titled "Index" and includes the following sections:

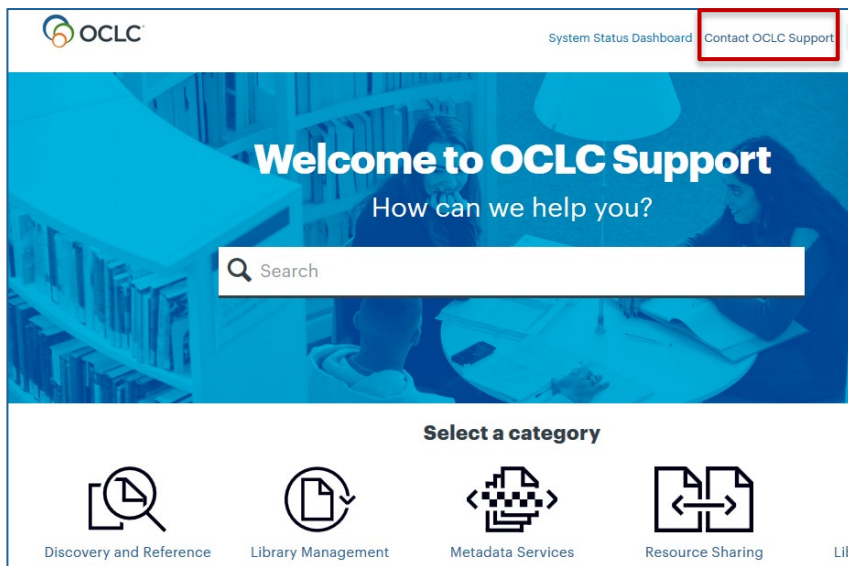
- Index**: A brief description and a note that all times are in Eastern Standard Time.
- Index status**: A green box indicating "Last index successful" on 2009-02-15 at 15:48:30.
- Scheduled indexes – pending**: A grey box indicating "No indexes scheduled".
- Index history**: A table showing a single entry for 2009-02-15 at 15:48:30 with a duration of 00:00:01 and 0 items indexed.
- Index scheduler**: Options for "Immediate indexing" (with an "index now" button) and "Scheduled indexing" (with options for "Once on" or "Recurring at" and a calendar for selecting days).



# Questions?

Contact OCLC Support in your region

<https://help.oclc.org>



1-800-848-5800



# Thank You!

Please remember to fill out the evaluation for this class

- Instructor: Mindy Tran
- Category: Digital Collection Service
- Class name: **CONTENTdm Basic Skills 1 – Getting Started with CONTENTdm**

Training questions? Contact OCLC Training [training@oclc.org/](mailto:training@oclc.org)