Before a single item or compound object is added to a collection and become available to the end users, it must be approved and indexed. You can approve items if you have rights to Approve items and build indexes.

Using the approve function, CONTENTdm administrators can review controlled vocabulary terms, items, and compound objects that have been uploaded to the pending queue from one or more CONTENTdm Project Client workstations or added using the Web-based Add in CONTENTdm Administration.

You can approve pending items:

- Immediately, one at a time or in batch
- Immediately, in batch, followed by immediate indexing
- At a scheduled time, either one-time or recurring, that approves all items in the pending queue

Note: Only one approval or index process can run at a time for the same collection (i.e., approval and index processes do not run simultaneously). For example, when a scheduled index is running on the server, the subsequent scheduled approval is queued and will be run when the scheduled index completes.

To access the Approve page

After logging in CONTENTdm Administration, click the items tab and then click approve. (Project Client users with appropriate rights can access the Approve page from the Administration menu.) All files in the pending queue of the specified collection are displayed. You can review, approve, or delete those items, as well as review and edit controlled vocabulary terms, and set up or manage scheduled and pending approvals.

Approved items are added to the collection but cannot be searched or browsed until the text index is built (for more information, see Building a collection Index).

Although you can approve a very large number of items at a time, to maintain acceptable performance, we recommend you limit your approval of items in batches of less than about 50,000 items.

Reviewing and approving pending items immediately

You can either choose to approve all pending items and controlled vocabulary terms at once, or you can review the detailed approval queue actions, and edit, approve or delete individual items and terms.

Note: A maximum of 100 items can be viewed in the pending queue at one time. As items are approved, the remaining items in the pending queue will display.
Full Approval Queue Actions

If you use the full approval queue actions options, all items are added to the collection, including items containing unauthorized controlled vocabulary terms. The unauthorized controlled vocabulary terms are added to the collection but the terms are not added to the controlled vocabulary list.

Note: Items that do not have metadata in required fields are approved when approving all items.

To approve all pending items:

Open CONTENTdm Administration and navigate to the Approve Items page.

In the Full Approval Queue Actions box, select Approve All and click Go.

The Approve Items page reloads, displaying a status message while the approval is in progress. You cannot approve or review other items or controlled vocabulary terms until completion.

When the approval process completes, the Approve Items page displays an updated status and view of items in the pending queue.

To approve all pending items and index the collection:

1. Open CONTENTdm Administration and navigate to the Approve Items page.

2. In the Full Approval Queue Actions box, select Approve & Index All and click Go.

3. The Approve Items page reloads, displaying a status message while the approval is in progress. You cannot approve or review other items or controlled vocabulary terms until completion.

When the approval process completes, the Approve Items page displays an updated status and view of items in the pending queue.

The index process begins to run as soon as the approval completes. For more information about indexing, see Building the Text Index.

To delete all pending items:

1. Open CONTENTdm Administration and navigate to the Approve Items page.

2. In the Full Approval Queue Actions box, select Delete All and click Go. The Delete All page displays.

3. Confirm that you want to delete all pending items by typing "OK" in the text box (case-sensitive), and then click Delete All.

Caution: Choosing to delete all items from the pending queue deletes all items uploaded by any user. Click Cancel to return to the Approve Items page without deleting items.
The Approve Items page reloads, displaying an updated view of items in the pending queue.

**Detailed Approval Queue Actions**

The detailed approval queue actions enable you to edit and add items in the pending queue. If you use the detailed approval queue actions options, only the selected items are added to the collection. You cannot approve items that have unauthorized controlled vocabulary terms unless you first add those terms to the controlled vocabulary or edit them to conform. For more information, see [Controlled Vocabulary](#).

Note: A maximum of 100 items displays at a time. As items are approved or deleted, the display updates to show the next 100 items in the pending queue.

**To edit and approve a single pending item (single approve):**

1. Open CONTENTdm Administration and navigate to the Approve Items page.

2. In the Detailed Approval Queue Actions box, click Edit for the item you want to edit and approve. The Edit Pending Item page displays.

   1. Edit the metadata as desired. If a field has a controlled vocabulary, you can view its controlled vocabulary list by clicking Controlled Vocabulary (or Shared Controlled Vocabulary, if shared). Controlled vocabulary conflicts are displayed by field at the top of the page. (You cannot approve items that have unauthorized controlled vocabulary terms unless you first add those terms to the controlled vocabulary or edit them to conform.)

   2. Click Approve. The Approve Items page displays and the item is no longer displayed as a pending item.

**To approve one or more pending items (selected approve):**

1. In the Detailed Approval Queue Actions box, select the item or items and click Approve. Items marked with an asterisk contain unauthorized controlled vocabulary terms.

2. The Approve All page displays the items as they are approved (this may be brief).

3. When all the selected items are approved, the Approve Items page displays, and the items are no longer displayed as pending items.

**To delete selected pending items:**

In the Detailed Approval Queue Actions box, select the item or items and click Delete. The Approve Items page displays, and the items are no longer displayed as pending items.

Note: Deleted items are permanently removed and are never added to the collection unless they are re-added and approved.
Scheduled approvals

Scheduled approvals approve all currently pending items and controlled vocabulary terms. (To add terms to the controlled vocabulary, you must use the detailed approval queue actions on the Approve Items page.)

You can choose to set up an approval process to start once at a specified future date and time, or to use recurring approvals. This is a useful way to automate some of your collection management tasks and allow approval processes to run in the background during convenient times. (You may want to schedule related index processes, as well. For more information, see Build a collection index.) After you have set up scheduled approvals, you can view and cancel pending approvals.

Note: All times are displayed in the time zone of your server.

To schedule a one-time approval process:

1. Open CONTENTdm Administration and navigate to the Approve Items page.
2. In the Scheduled Approvals box, click Add. The Manage Scheduled Approvals page displays.
3. In the Scheduled Approvals box, select the Once On option and specify the date and time that the approval process should start. Clicking in the date field displays a calendar that you can use to select a date.
4. Click Schedule Approval to save. The Approve Items page displays, with the new scheduled approval displayed as pending. (You may need to click See All in the Scheduled Approvals — Pending box to see all pending approvals because the box displays only the next three approval processes.)

You can confirm that the process was successfully run by viewing the approval history.

To schedule a recurring approval process:

1. Open CONTENTdm Administration and navigate to the Approve Items page.
2. In the Scheduled Approvals box, click Add. The Manage Scheduled Approvals page displays.
3. In the Scheduled Approvals box, select the Recurring At option and specify the time and day(s) that the approval process should always be started.
4. Click Schedule Approval to save. The Approve Items page displays, with the new scheduled approval displayed as pending. (You may need to click See All in the Scheduled Approvals — Pending box to see all pending approvals because the box displays only the next three approval processes.)

You can confirm that the process was successfully run by viewing the approval history.
To cancel scheduled approvals:

1. Open CONTENTdm Administration and navigate to the Approve Items page.
2. In the Scheduled Approvals box, find the scheduled approval process you want to cancel, and then click Cancel.

If you have more than three pending approvals, click See All. The Scheduled Approvals page displays, listing all pending approvals. You can choose to cancel one or all scheduled approvals.

After clicking Cancel or (Cancel All), a dialog box displays, confirming that you want to cancel the approval process(es).

Note: Canceling recurring pending approvals cancels all occurrences.

(Alternatively, you can click Add to display the Manage Scheduled Approvals page where you can review pending approvals, the approval history, and cancel approvals in one view.)

3. Click OK to confirm the cancellation. The Approve Items page displays, with the cancelled scheduled approval(s) removed from the pending list.

Controlled Vocabulary

A controlled vocabulary defines a list of valid terms that can appear in metadata fields within CONTENTdm. A controlled vocabulary allows an administrator to restrict metadata in selected fields to specific words or phrases. Pending controlled vocabulary terms displayed on the Approve Items page are not authorized for the collection until you add or edit them.

Add. Adds the term to the controlled vocabulary.

Edit. Takes you to an edit list that provides you with a list of all items that contain the pending vocabulary term in its metadata. Clicking on edit for one of those items allows you to edit the term.

Note: If you are administering a shared controlled vocabulary, any changes will also change the vocabulary in other fields and collections that use it. A good practice is to always review the list of fields and collections sharing the controlled vocabulary before making changes to help you determine the impact. For more information, see Use Controlled Vocabulary.

To add term(s) to the controlled vocabulary:

1. Open CONTENTdm Administration and navigate to the Approve Items page.
2. In the Detailed Approval Queue Actions box, review the terms in the Controlled Vocabulary list.
3. Click the Add link for the term you want to add to the controlled vocabulary. Or you can click Add All if you want all of the displayed terms added.
4. The Approve Items page updates with the term(s) removed from the Controlled Vocabulary list.
To change or delete the term within the item:

1. On the Approve Items page in the Detailed Approval Queue Actions box, locate the term that you want to add to the controlled vocabulary.

2. Click Edit to display the Edit List, which enables you to then choose the item that contains the metadata to change.

3. Click Edit next to the item. The Edit Pending Item page displays.

4. Review the Conflicts list and edit or delete the term within the controlled vocabulary field.

5. Click Approve to add the item to the collection.

   Note: If the term that you changed is not in the controlled vocabulary list, a message displays that the term is not in the controlled vocabulary field.
   Clicking OK displays the Edit Pending Item page.

Approval History

The approval history enables you to review the date, time, duration and number of items in all past approval processes (both scheduled and immediate).

To review the approval history:

Click the “view approval history” link on the upper-right corner of the “Full approval queue actions”.

https://help.oclc.org/Metadata_Services/CONTENTdm/CONTENTdm_Administration/Item_administration/010Appr…
Printed: Fri, 04 Sep 2020 20:25:49 GMT