



CONTENTDM PROJECT CLIENT WORKFLOW

August 4, 2022





CONTENTdm – Batch Uploading

Open CONTENTdm Project Client

Open CDM Administration website and login with your credentials

Open your project in Project Client and verify you have the correct template open. Project template appears under the project name. Please see example image below:



If your project does not appear, then you will need to import the project. Please contact LM staff for assistance with importing projects.

Batch uploading Multiple Items

Click on Add Multiple Items option located in Common Tasks menu

Cor	nmon Tasks
1	Add Item
٦	Add Multiple Items
٩	Add Compound Objects
	Edit Existing Items
	Edit Existing Items

Choose Import using a tab-delimited text file as your import method. Click **Browse** and select the tab-delimited file on your computer to import.

Import from a dire	ectory	
Directory name:		Browse
Import using a tal	p-delimited text file	
File name:	S:\5_Students\MDOT test\text file\MDOT-Research-2021.txt	Browse
item that you are directory.	porting. One field in each subsequent record must contain the file nam importing. All images specified in the tab-delimited file must exist in a	separate

Click Next

Choose Import files from a directory as your import method. Click **Browse** and navigate to Folder with scanned files.

Add Multiple Items - Import Type	×
What do you wish to import?	
Impart files from a directory	
Content of the second s	
Directory name: D:\3_Students\MDOI test\test pats	Browse
C Import URLs	
O Import metadata only	
e Back Nave >	Cancel
S DACK IVEXUS	Cancel

Click Next

Select **Yes** under Do you want to create display images? Select **Auto-generate display images** under Display Image Handling.

	isplay images:
•Yes ON	lo
Display Image Handlin	g
Auto-generate dis	play images
C Use preprocessed	display images
Directory name:	Browse
Preprocessed dis tree.jpg is the dis	splay images must have the same root file name as archival files. Example: splay image for tree.tif.
or additional display im	vace settings click Image Options.
For additional display im	age settings, click Image Options.
or additional display im	age settings, click Image Options.
For additional display im	age settings, click Image Options.

Click Next

Make sure that the Collection Fields on the right match the Imported Fields on the left. They must be in exact order for the upload to work. The ONLY field that does not match is the **Unique Identifier**. It links to the Object Filename. This is how CONTENTdm takes the metadata file and the images and brings them together to add multiple items. To ensure that the researcher can view the filename on each item in your collection, you will need to create a duplicate field in your Excel spreadsheet that can be called **Filename** that will contain the **Identifier** field information. Below is an image of the field information in CONTENTdm depicting the Unique Identifier. The Filename field will also have the same identifier information.

Clic	k a collection field to map it to the im	ported field	
	Imported Fields	Collection Fields	-
•	Title	Title	-
	Creator	Creator	-
	Publisher	Publisher	-
	Date	Date	-
	Report Number	Report Number	-
	Description	Description	-
	Collection	Collection	-
	Sub Collection	Sub Collection	-
	Document Type	Document Type	-
	Related Files	Related Files	-
	Funding Type	Funding Type	-
	Subject	Subject	-
	Place	Place	•
	Copyright Status	Copyright Status	-
	Terms of Use	Terms of Use	-
	Rights Holder Contact	Rights Holder Contact	-
	Contributing Institution	Contributing Institution	-

	13	Relation	Relation-Is Part Of	Text	
	14	Unique identifier	Identifier	Text	\sum
Click Next.					

A Progress bar will appear on screen. If there is a problem with the upload, the progress bar will disappear, and you will see an error display window. The window below shows the example of a successful adding process. If not successful, the window below would display the error message. Please copy down the error message you see to help troubleshoot the error. Once you click the close button, you will not be able to see the error message again unless you repeat the upload steps to recreate the error.



Click Close

Your screen will look similar to this:

🔗 Home	🔦 Find in	Collection 🔒 MDOT	research reports test								
nd & Replace Spell Check Replace	eltems Mo	re Actions 👻									
	Select All	Clear All 🛛 🚔 Upload for A	pproval Open in Tal	b Delete						≪ 1 to	4 of 4 items 🗼
ransportation_genpub		Thumbnail	Title	Creator	Publisher	Date	Report Number	Description	Collection	Sub Collection	Document Type
MDOT research reports test		20.02 hand	Slope restoration	Bert Cregg, Robert Schutzki	Michigan						
ommon Tasks Add Item			on urban freeways	and Madeleine Dubelko	Department of Transportation	2021-08-11	SPR-1701		MDOT Research		Report
Add Multiple Items											
 Add Compound Objects Edit Existing Items 		(MURCHARK)	Connected/Autor Vehicle and	James R. Sayer	Michigan Department of Transportation	2021-06-11	SPR-1695		MDOT Research		Report
tem Tasks			Research		numperturber.						
Open in Tab View Celete Upload for Approval		proception	Development of Guidelines for the Use of Intermediate Diaphragms on	Christopher D. Eamon, Fatmir Menkulasi, Bellikoth V.	Michigan Department of	2021-08-27	SPR-1702		MDOT Research		Report

Scroll through the list of files and look for red exclamation points or other signs near the check boxes. Those signs indicate that something is wrong with the record, but that it will not prevent the upload process. Typically, there is a field with missing information that is required. Solve yellow warning signs if possible and then click **Select All** and then click **Upload for Approval**.

Select All	Clear All	🚔 Upload for Approval	

Next, log into the CONTENTdm Administration URL with the credentials supplied to you by the Library of Michigan to continue with upload steps. The CONTENTdm Administration URL will work in the browser: Firefox. It does not work in other browsers very well. The URL will be provided to you in an email.

Once you log in, you will see this page:

admin home		server	collections	items	
		:: approve : index : add	d : edit : find & replace : loc	k administration : view col	lection : help ::
t collection: Michigan	Government Information	✓ change			
Item administrat	ion				
Approve Approve, edit or delet	e items in the pending queue.				
Index Index the collection a	fter adding, approving, editing and	d deleting items.			
Add Add an item to the pe	ending queue. Items are reviewed a	and approved before becoming part of th	e collection.		
Edit Edit and delete items	in a collection.				
Find & replace Find and replace meta	data within one field, all fields, or o	change fields for all items.			
Lock administration Unlock items in a colle	ction.				
View collection	in the website display				

Click on the **Items** tab at right side of screen. Click on **Approve**. Select your collection from the Current Collection drop down box and click **Change**:

admin home			serve
		:: approv	e:index::
Current collection: Michigan C	Government Information	~	change

When you change the Collection, you will see the number of items available to approve. The example below has five (5) items. Scroll to bottom of page and select all the items and then click **Approve** to approve them. You may have to approve your items in batches since the approval list will only show the first 100 items.

schedule an approval process, click add		
Full approval queue actions	view approval his	tory
Now: 5 pending item(s), 1 controlled vocabulary terms	Scheduled approvals – pending a	dd
 Approve all (Records with unauthorized terms are approved but terms are not added to the controlled vocabulary.) 	No approvals scheduled	
O Delete all Warning: This cannot be undone.		
Detailed approval queue actions		
Controlled Vocabulary	a00a	1
undetermined	add ed	lit
Reviewing 5 of 5 pending item(s) Before reviewing items, you should review the unauthorized control * Items marked with and asterisk contain unauthorized control	vocabulary terms above. Diled vocabulary terms.	

The approval process may take several minutes depending on the number of items. Once the process is complete, click on the option: **Index** in the top menu.

ext, click on Index Now option.	
Index Index the collection after you have added or deleted items, or char	
	nged metadata within a collection. Indexing may take several minutes.
Note: All times shown are in EDT.	Index scheduler
Note: All times shown are in EDT. Index status Last index successful Started: 2022-03-11, 21:59:38	Index scheduler Immediate indexing Start the index process now to update your collection without scheduling.

The indexing process may take several minutes to complete. The index box in green above will turn yellow while the indexing is taking place. Continue with other work until indexing is complete. Once complete, check your collection in LMDigital. The items will now appear in your collection.