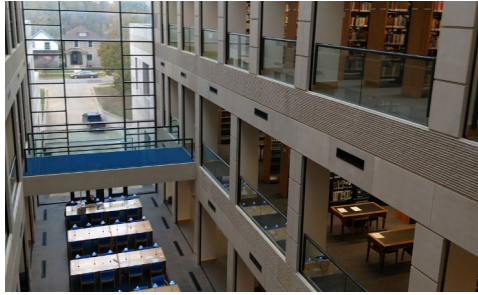




LIBRARY OF MICHIGAN



CONTENTDM PROJECT CLIENT WORKFLOW

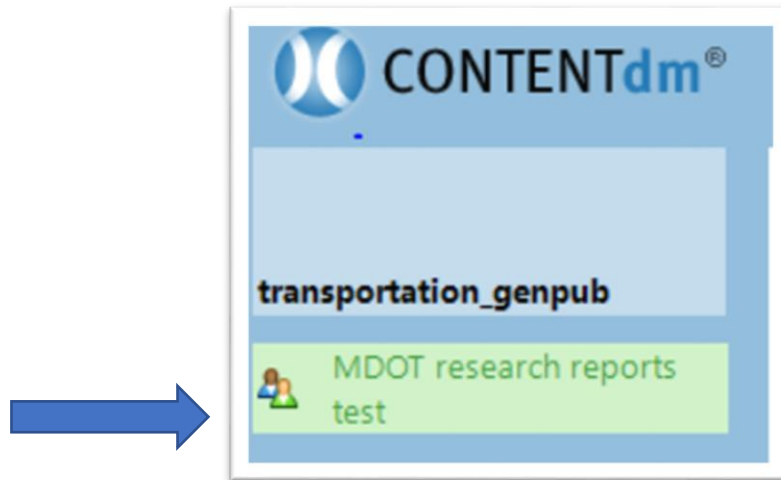
August 4, 2022

CONTENTdm – Batch Uploading

Open CONTENTdm Project Client

Open CDM Administration website and login with your credentials

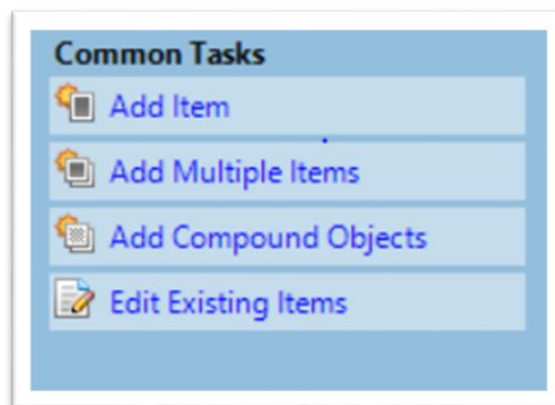
Open your project in Project Client and verify you have the correct template open. Project template appears under the project name. Please see example image below:



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



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.

Choose your import method

☐ Import from a directory

Directory name:

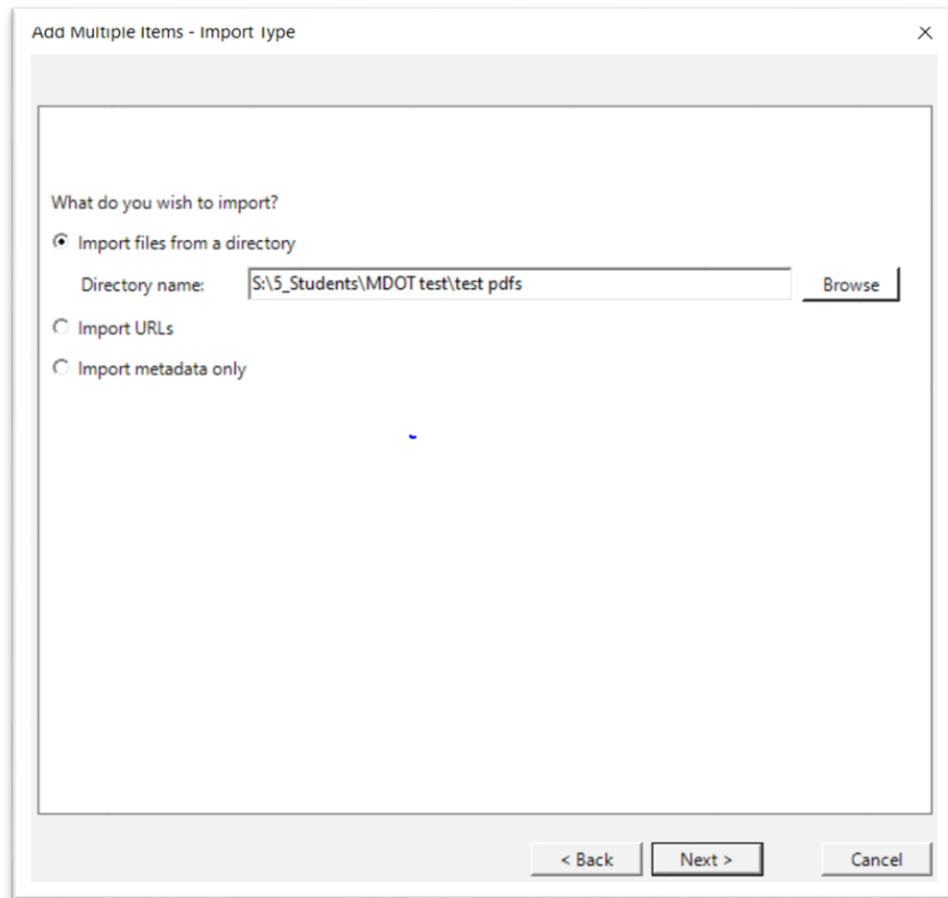
☒ Import using a tab-delimited text file

File name:

If you are importing files using a tab-delimited text file: The first record should contain the field names you are importing. One field in each subsequent record must contain the file name of the item that you are importing. All images specified in the tab-delimited file must exist in a separate directory.

Click **Next**

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



The screenshot shows a dialog box titled "Add Multiple Items - Import type" with a close button (X) in the top right corner. The main area contains the question "What do you wish to import?" followed by three radio button options: "Import files from a directory" (which is selected), "Import URLs", and "Import metadata only". Below the "Import files from a directory" option, there is a text field labeled "Directory name:" containing the path "S:\5_Students\MDOT test\test pdfs". To the right of this text field is a "Browse" button. At the bottom of the dialog box, there are three buttons: "< Back", "Next >", and "Cancel". The "Next >" button is highlighted with a black border.

Click **Next**

Select **Yes** under Do you want to create display images?

Select **Auto-generate display images** under Display Image Handling.

Add Multiple Items - Archive File Settings

Do you want to create display images?

☒ Yes ☐ No

Display Image Handling

☒ Auto-generate display images
☐ Use preprocessed display images

Directory name: [Browse](#)

Preprocessed display images must have the same root file name as archival files. Example: tree.jpg is the display image for tree.tif.

For additional display image settings, click Image Options.

[Image Options](#) [< Back](#) [Next >](#) [Cancel](#)

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.

Add Multiple Items - Map Metadata Fields

Click a collection field to map it to the imported field

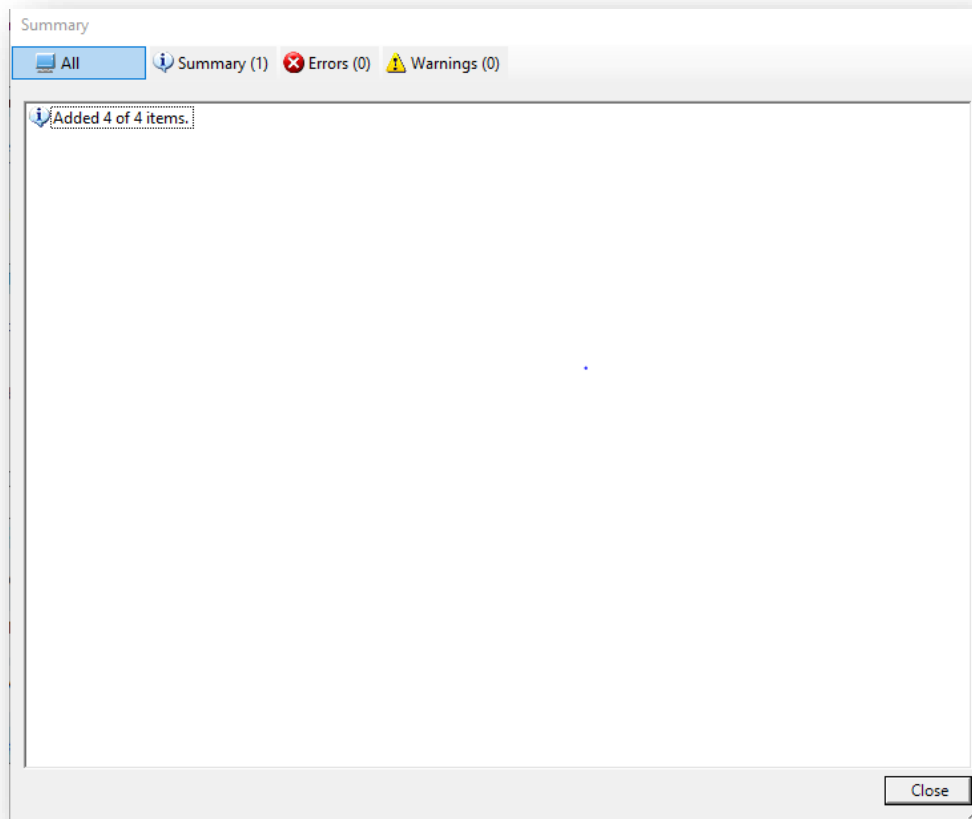
Imported Fields	Collection Fields
Title	Title
Creator	Creator
Publisher	Publisher
Date	Date
Report Number	Report Number
Description	Description
Collection	Collection
Sub Collection	Sub Collection
Document Type	Document Type
Related Files	Related Files
Funding Type	Funding Type
Subject	Subject
Place	Place
Copyright Status	Copyright Status
Terms of Use	Terms of Use
Rights Holder Contact	Rights Holder Contact
Contributing Institution	Contributing Institution

Encoding < Back Next > Cancel

13	Relation	Relation-Is Part Of	Text
14	Unique identifier	Identifier	Text

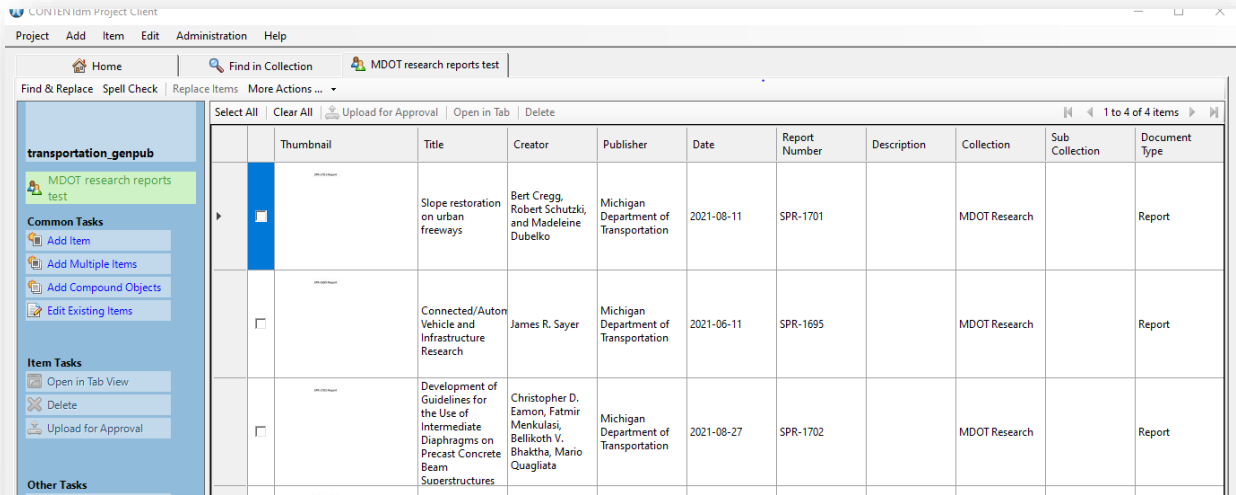
Click **Next**.

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:

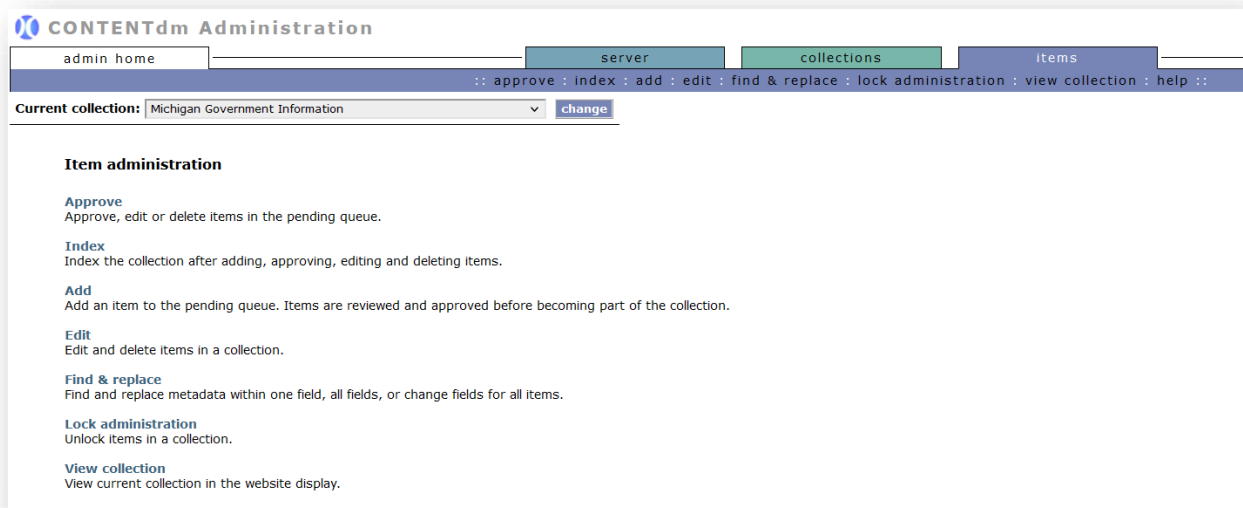


Scroll through the list of files and look for red exclamation points or other signs near the check boxes. Those signs indicate that something is wrong with the record, but that it will not prevent the upload process. Typically, there is a field with missing information that is required. Solve yellow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

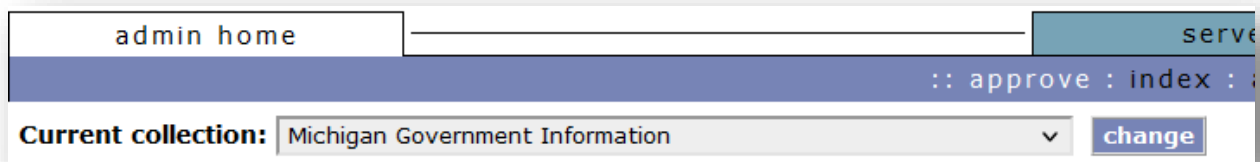


Next, log into the CONTENTdm Administration URL with the credentials supplied to you by the Library of Michigan to continue with upload steps. The CONTENTdm Administration URL will work in the browser: Firefox. It does not work in other browsers very well. The URL will be provided to you in an email.

Once you log in, you will see this page:



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**:



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.

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		view approval history
Now: 5 pending item(s), 1 controlled vocabulary terms	Scheduled approvals — pending add	
☒ Approve all (Records with unauthorized terms are approved but terms are not added to the controlled vocabulary.)	No approvals scheduled	
☐ Approve & index all		
☐ Delete all Warning: This cannot be undone.		
go		

Detailed approval queue actions	
Controlled vocabulary	add all
Copyright Status field	
undetermined	add edit

Reviewing 5 of 5 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

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.

:: approve : **index** : add : edit : find & replace : lock administration

Next, click on **Index Now** option.

Index
Index the collection after you have added or deleted items, or changed metadata within a collection. Indexing may take several minutes.
Note: All times shown are in EDT.

Index status

Last index successful
Started: 2022-03-11, 21:59:38

Scheduled indexes — pending

Index scheduler

Immediate indexing
Start the index process now to update your collection without scheduling.

index now

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.