CONTENTdm Basic Skills 1: Getting Started with CONTENTdm

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Senior Product Trainer
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
Step 1 – Add a collection

Creation of the collection happens at the **Server** tab of the **CONTENTdm Administration** module.
Step 1 – Add a collection, cont.

1. Click **add collection**
2. Provide a **collection name**
3. Provide a **collection alias**
4. Click **add button to add** the new collection
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
## Configure a Collection—Optional Settings

<table>
<thead>
<tr>
<th>Optional collection settings summary</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PDF conversion</strong></td>
<td>Do not convert multiple-page PDF files to compound objects</td>
</tr>
<tr>
<td><strong>Display image settings</strong></td>
<td>Do not generate display images from full resolution images.</td>
</tr>
<tr>
<td><strong>Archival file manager</strong></td>
<td>Do not save files to an archive volume location</td>
</tr>
<tr>
<td><strong>Image rights</strong></td>
<td>No image rights options available for Web imports (create in the Project Client)</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Supported formats</th>
<th>yyyy-mm-dd</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>yyyy-mm</td>
</tr>
<tr>
<td></td>
<td>yyyy</td>
</tr>
<tr>
<td></td>
<td>mm/dd/yyyy</td>
</tr>
<tr>
<td></td>
<td>mm/yyyy</td>
</tr>
<tr>
<td></td>
<td>yyyy-yyyy</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Supported delimiter between dates</th>
<th>comma (,)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>semi-colon (;)</td>
</tr>
</tbody>
</table>

| Supported delimiter in date range | hyphen (-) |

<table>
<thead>
<tr>
<th>Multiple dates (space not required)</th>
<th>yyyy; yyyy; yyyy</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>yyyy; yyyy; yyyy; yyyy</td>
</tr>
</tbody>
</table>
Metadata Fields—Field Settings

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.

<table>
<thead>
<tr>
<th>Field name</th>
<th>DC map</th>
<th>Data type</th>
<th>Large</th>
<th>Search</th>
<th>Hide</th>
<th>Required</th>
<th>Vocab</th>
<th>add field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Title</td>
<td>Text</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>move to</td>
</tr>
</tbody>
</table>

- **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 Art & Architecture Thesaurus (AAT)
  - Use Dublin Core Metadata Initiative Type Vocabulary
  - Use Getty Thesaurus of Geographic Names (TGN)
  - Use Guidelines On Subject Access To Individual Works Of Fiction, Drama, Etc., 2nd ed., form and genre
  - Use Medical Subject Headings (MeSH) 2008
  - Use Newspaper Genre List
  - Use Thesaurus for graphic materials: TGM 1. Subject terms
  - Use Union List of Artist Names (ULAN)

- Use the existing contents of the field

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

- Do not share this controlled vocabulary

- Use a controlled vocabulary from another field or collection

Choose the controlled vocabulary

Save changes
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

<table>
<thead>
<tr>
<th>Recommended Discovery Metadata</th>
<th>Guidelines</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Element Name: Contributor</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Element Name: Coverage</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Element Name: Creator</strong></td>
<td>If no creator can be determined, leave blank. If the creator is not known, you may enter creator unknown in the Description element. 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>). If an item has more than one creator, enter names in the same creator field separated by a semi-colon and a space.</td>
</tr>
<tr>
<td><strong>Element Name: Date</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Element Name: Description</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Element Name: Format</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Element Name: Identifier</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Element Name: Language</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Element Name: Publisher</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Element Name: Relation</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Element Name: Rights</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Element Name: Source</strong></td>
<td>Required field; use Thesaurus for Graphic Material</td>
</tr>
<tr>
<td><strong>Element Name: Subject</strong></td>
<td>Required field</td>
</tr>
<tr>
<td><strong>Element Name: Title</strong></td>
<td>Required field</td>
</tr>
<tr>
<td><strong>Element Name: Type</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Element Name: Audience</strong></td>
<td></td>
</tr>
</tbody>
</table>

| Recommended Non Dublin Core Elements | |
|--------------------------------------| |
| **Element Name: Cataloged By**       | |
| **Element Name: Notes**              | |
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
Step 5 – Add Digital Items

Options for importing include:

• Single Item
• Multiple Items in a Single Directory
• Compound Object(s)
• Finding Aid
• URL
Entering Metadata for Digital Items

Field Name | Field Values
--- | ---
Title | Sarah_Pearson_12
Subject |
Description | 98114188 Bytes
Creator | Craven Collection
Publisher | OCLC Western
Contributors | OCLC/strawbird
Data |
Type |
Format |
Identifier |
Source | Sarah_Pearson_12.tif
Language |
Relation |
Coverage |
Rights |
Audience |
Full resolution |
OCLC number |
Entering Metadata—Controlled Vocabulary

Controlled vocabularies
Step 5 – Upload Items for Approval

<table>
<thead>
<tr>
<th>Thumbnail</th>
<th>Title</th>
<th>Subject</th>
<th>Description</th>
<th>Creator</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Emma_Hardy_b.1845</td>
<td></td>
<td></td>
<td>Craven Family Collection</td>
</tr>
<tr>
<td></td>
<td>Annie_Craven.1869</td>
<td></td>
<td></td>
<td>Craven Family Collection</td>
</tr>
<tr>
<td></td>
<td>Lillie_Hardy&amp;_Friends</td>
<td></td>
<td></td>
<td>Craven Family Collection</td>
</tr>
</tbody>
</table>
Step 6 – Approve 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
Now 6 pending item(s), 1 controlled vocabulary terms
- Approve all
  - (Records with unauthorized terms are approved but terms are not added to the controlled vocabulary.)
- Approve & index all
- Delete all
  - Warning: This cannot be undone.

Scheduled approvals — pending
No approvals scheduled

Detailed approval queue actions
Controlled vocabulary
Subject field
- add all

Reviewing 6 of 6 pending item(s)
Before reviewing items, you should review the unauthorized controlled vocabulary terms above.
* Items marked with an asterisk contain unauthorized controlled vocabulary terms.

Approve | delete
--- | ---

Select: all 6 | none
- Annie_Green_1909 | edit
- * Annie_Green_1869 | edit
- Linda&Beryl | edit
- Linda&Beryl | edit
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
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/