

CONTENTdm Project Client Guide

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Montana Memory Project

I. Introductory Information

A. CONTENTdm VOCABULARY

Administration: CONTENTdm online interface for uploading edited files from the Project Client to the Montana Memory Project web site

Compound object: Multiple images files that are displayed to the end user as a single object (e.g. books, pamphlets, newspapers, and photo albums)

CONTENTdm: a windows-based, digital collection builder where data and digital items are prepared in large batches via the CONTENTdm Project Client and then uploaded to a CONTENTdm server

Digital collection: the items grouped by provenance or theme as proposed by contributors in the MMP Collection Application. All MMP digital collections are at <http://mtmemory.org/>

Import: when items are entered from a local computer into the Project Client

Item: A file and its associated metadata

Object: An item or a group of items that collectively represent a single work

OCR license: An OCR license, or Optical Character Recognition License, is used to convert a digitized image of text into a searchable text file. If you have text-based items (pamphlets, books, reports, etc.), please contact Katie Beall at kbeall@mt.gov to reserve an OCR license **before** entering items into the Project Client.

Project: the temporary interface used to save work in the Project Client while importing images and editing metadata for a collection

Project Client: Downloaded CONTENTdm software where data and digital items can be prepared in large batches

Upload for approval: the final step to be completed in the Project Client. Once a project's images and metadata have been imported and edited in a project, the items will be uploaded for approval. Once uploaded, the items are added to the pending queue in CONTENTdm Administration to be approved and indexed to the Montana Memory Project web site

Montana Memory Project

I. Introductory Information

B. Download the Project Client Software

CONTENTdm's Project Client software is what MMP contributors use to prepare data and digital items in large batches. The downloadable installation file for Project Client is located at the ContentDM User Support Center (USC). You will need an account at the USC in order to create or update Project Client and get access to OCLC documentation. All MMP contributors should create an account at the USC.

Note: This procedure assumes you are downloading to a Windows computer.

1. Go to <http://contentdm.org/USC>
2. If this is your first time at this site, you will need to register under **Register Now**. Contact the MMP technical support at mmp@mt.gov for the Organization ID. For your username, enter your email address. For password, create your own password.
3. Once you are logged in, click **Downloads** on the top right of the page.
4. On the *CONTENTdm Downloads* page, under *Other Downloads*, click the link **Project Client**.
5. On the next page, right-click on the link called **InstallProjectClient612.zip**. In the pop-up menu, click **Save Target As/Save Link As**.
6. In the Save As window, choose a location (the easiest is to your Desktop) and click the **Save** button. Wait for the download to complete.
7. Locate the file **InstallProjectClient** icon on your computer and double-click to unzip it.
8. You should see an icon called **Install Project Client**. Double-click it.
9. Choose **Run** if a message about the publisher being unverified opens. If asked about installing required or recommended tools, choose **Yes**.
10. After installation is complete, you will see an *Install Complete* message. Close that message.
11. Locate the **CONTENTdm Project Client** icon on your desktop and double-click it.

You may be asked for the following:

- **User name**
*You were given this by the Montana State Library. It's a string of numbers and letters like **cdm/103401user85***
- **Organization name**
Type the name of your library or museum.
- **Serial number**
C92E8-39MPC-ZRY9U-EYE22
- **Password**
*You were given this by the Montana State Library. It is a string like **Yeg80Xeb**.*

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I. Introductory Information

C. Project Client Workflow

Preparatory steps to complete *before* working in the Project Client:

- ✓ Documents for the collection have been digitized and saved and named as digital files according to MMP recommendations
- ✓ Reserve an OCR license if necessary (Contact mmp@mt.gov to reserve a license)
- ✓ Contact the Montana State Library for CONTENTdm software training
- ✓ Download the Project Client

Steps to complete within the Project Client:

1. Open the Project Client
2. Create a new project or open an existing project in the home screen
3. Set up the project's settings in the Project Settings Template(s)
 - a. **If necessary**, activate an OCR license (The license will only be applied to items added *after* the license's activation)
 - b. Set up the project's metadata template(s)
4. Import items into the Project Client
5. Add and edit metadata
6. Upload Items for approval in CONTENTdm Administration



Montana Memory Project

I. Introductory Information

D. Navigate the Project Client: The Home Screen

The Home Screen

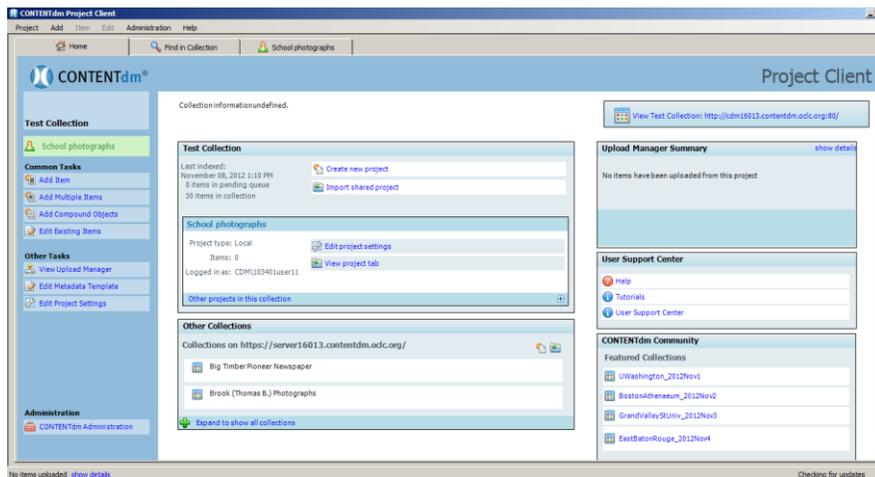


Figure 1. Project Client home screen

Just like with learning any piece of new technology (e.g. a cell phone, iPod, etc.) or software, take the time to explore the Project Client and look around. The home screen of the Project Client does present a lot of information but each option is presented *in multiple ways*. This is signified in Figure 2 by pairing repetitive options by color.

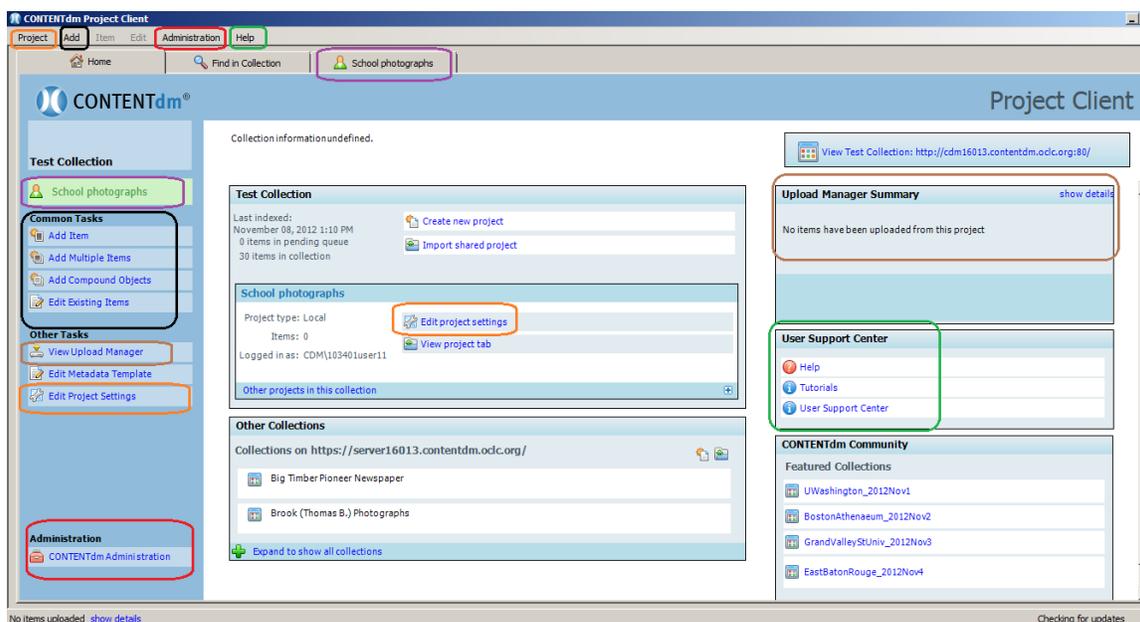


Figure 2. Repeated elements on the home screen are shown by common colors

Montana Memory Project

I. Introductory Information

D. Navigate the Project Client: The Project Screen

The Project Screen: see the open project information and perform the project tasks of importing items and editing metadata

New project screen:

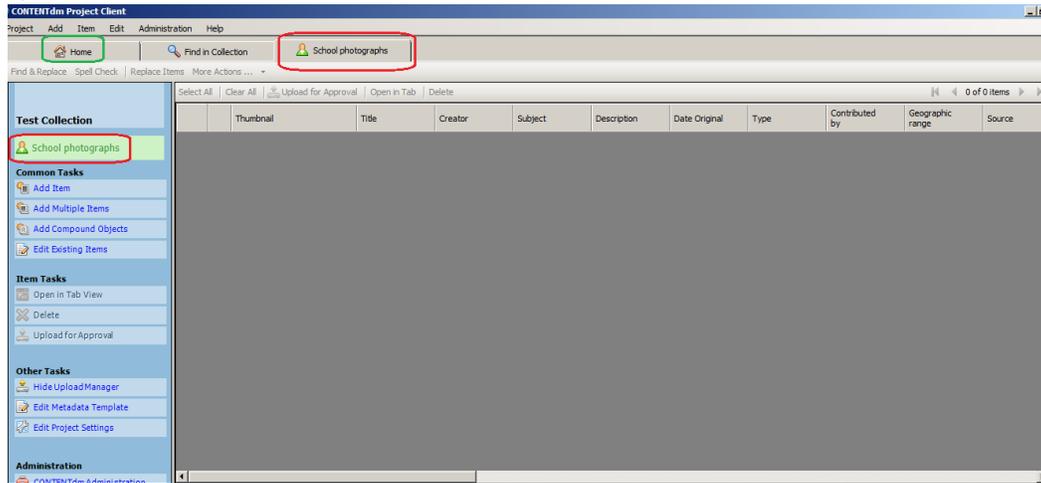


Figure 3. The project tab is highlighted in red; the home tab is shown in green

Active project screen:

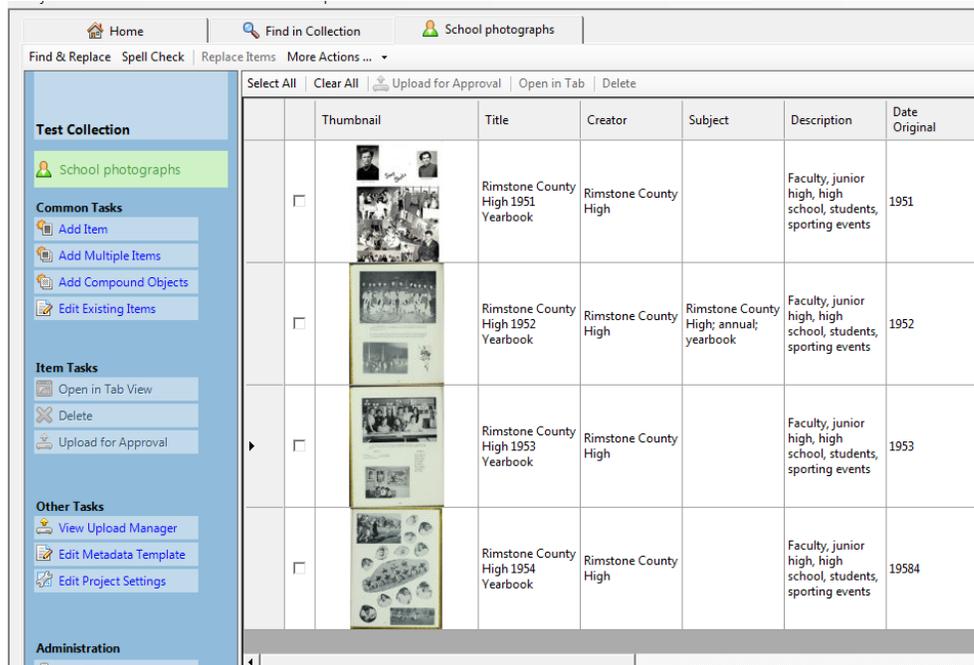


Figure 4. Items have been already imported (see under thumbnail tab) and metadata has begun to be added to the project spreadsheet.

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II. Create and Manage a Project

A. Create a New Project

Note: To create a second (or third, etc.) project, follow steps 2-7.

1. Double click the **CONTENTdm Project Client** icon on your desktop
2. On the home screen, click **Create a new project** (See Figure 5)
3. Enter in the Server URL **https://server16013.contentdm.oclc.org**
4. Enter in your user name and password (sent to you by the Montana State Library)
(Your username will be similar to CDM\104305user80 and your password will be a string such as Jub34Xat.)
5. Link the project to a collection—be certain to select the correct collection
6. Choose a project name (this name will only be used in the Project Client and once your project is uploaded for approval, the project name will no longer be associated with imported and uploaded items)

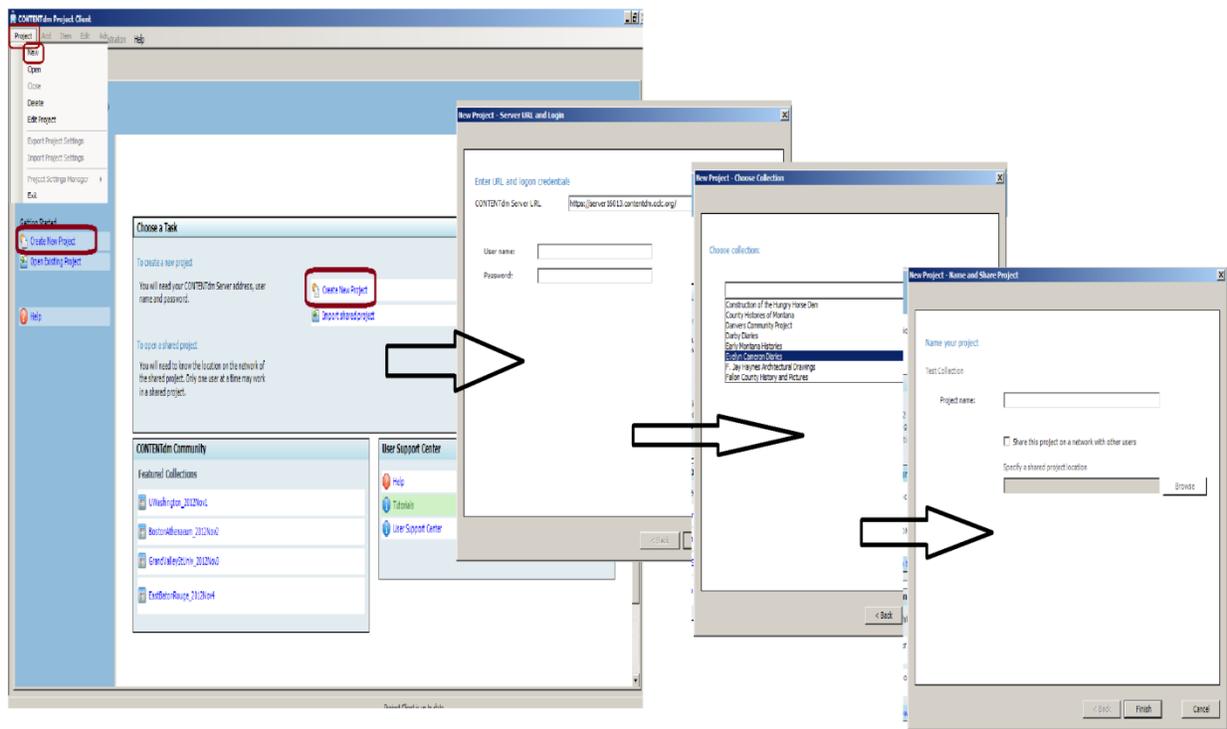


Figure 5. How to create a new project in the home screen: First, choose one of the three “Create Project” tabs (shown in red). Then, enter in your username (e.g. CDM\105201user29) and password (e.g. Boz79Kip). Select your collection, and choose a project name. Decide whether or not to share the created project

II. Create and Manage a Project

B. Open and Delete a Project

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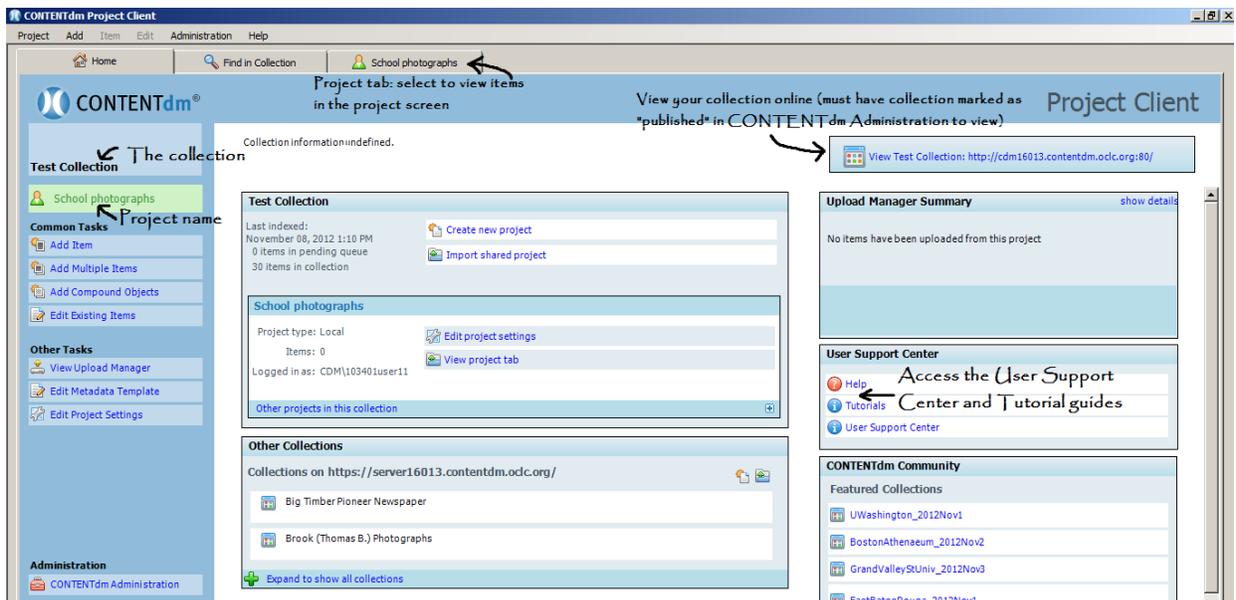


Figure 6. Once a project is created, the home screen will show current project information. In this guide, the project name is “School photographs” and the collection is titled “Test Collection”

Open an Existing Project

1. From the Project drop-down menu, choose **Open** (See Figure 7)
2. Highlight the correct MMP Collection and Project Name and click **Open**

Delete a Project

1. From the Project drop-down menu, choose **Delete** (See Figure 7)
2. If you want to delete a project that is currently open, **Close** it first and return to the home screen. Go back into the Project drop-down menu, choose **Delete**, and highlight your MMP Collection and Project Name and click **delete**

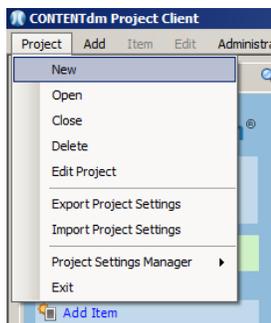


Figure 7: Go to the upper Project drop-down menu for more project options such as create new, open, close, delete, or edit a project.

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III. Set up Project Settings

By using the Project Settings Manager in the Project Client, there is a way to save specific settings in a template that are applied to each project. This is an efficient way to avoid having to enter repetitive metadata for imported items. Also, OCR licenses are activated at this same time (before items are imported so that a text transcript is created). Templates are set and OCR licenses are activated in the Project Settings Manager.

Choose one of the three ways to set up the Project Settings Manager (indicated by red boxes in Figure 8):

- From the **Project** drop-down menu, select **Project Settings Manager** and then select the necessary page
- From the Project Client **Home** tab, click **Edit Project Settings**
- Under **Other Tasks**, select **Edit Project Settings**

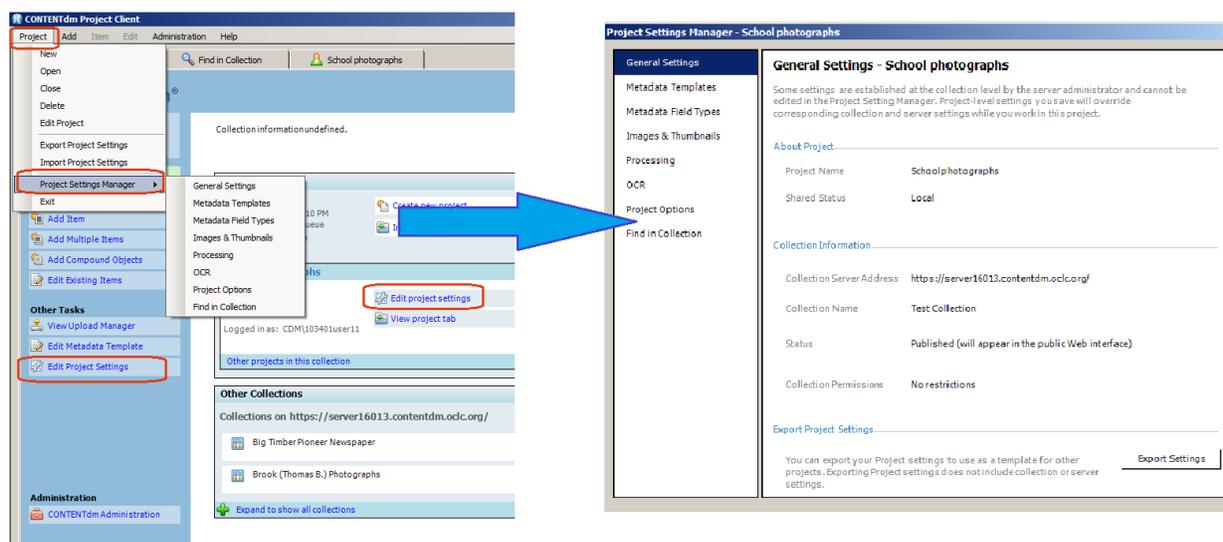


Figure 8. How to open up the Project Settings Manager

This guide focuses on the **Metadata Templates**, **OCR**, and **General Settings** options in the Project Settings Manager. MMP Contributors should be familiar with these tabs. Metadata Field Types, Images and Thumbnails, Processing, Project Options, and Find in Collection are not necessary for MMP contribution. Information about these tabs will not be covered in this guide but is available at the OCLC user support site.

- **General Settings:** provides basic project and basic collection information
- **Metadata Templates:** set up project template(s); enables contributor to select and customize metadata templates to help create consistency and expedite your cataloging process. Templates are available for the general project (all item types), or for specific item and object types, as well as for specific image file types.
- **OCR:** activate an OCR license to create text transcripts

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III. Set up Project Settings

A. Define Project Template(s)

Create a project template to allow shared settings and metadata to be applied to each item imported into the Project Client. There are two main ways to set up a project template:

- Use the general template to set a metadata template that will apply to all items imported after the template is set
- Use a combination of the file type-specific templates (not just the general template) for a collection with differing metadata values

Set shared metadata settings by using only the general template:

Create a **general** template that will apply to every item in the project. This means that all TIFFs, audio files, and compound objects, etc., could have all their shared metadata entered into the **general** template and this metadata would apply to every item thereafter imported.

1. Open the Project Settings Manager from the open Project Screen or home screen (See Figure 8)
2. Make sure **Metadata Templates** is highlighted in the left column
3. Click **Edit** next to **Project Settings (general)** (See Figure 9)
4. Enter any constant metadata by typing opposite the appropriate metadata field value in the blank **Default Value** column
5. If you are using multiple types of file formats (TIFFs, JPEGs, PDFs), a contributor can set the metadata to be repeated for a specific file format as long as, for example, all TIFF files have the same constant metadata fields. Any templates that are not the general template will override the general template. For example, a contributor can create a general template and still have one template that is unique for TIFF files that is different from the general template.

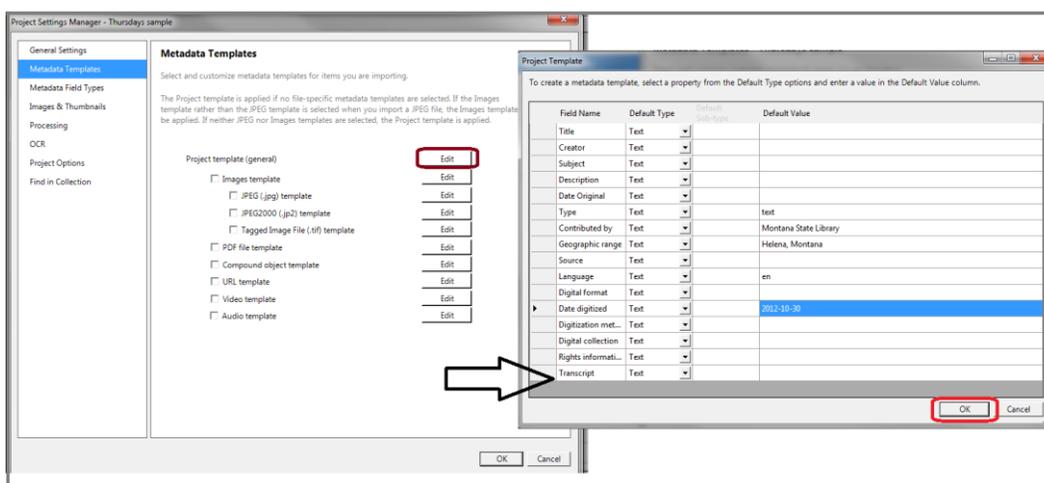


Figure 9. How to select the **general** template. In the example, the shared metadata fields are: type, contributed by, geographic range, language, and the date digitized. Select **Ok** to save the template

III. Set up Project Settings

Montana Memory Project

A. Define Project Template(s)

Set shared metadata settings by using a combination of templates

Option 1: The first option is to use the general template **only**, but to set and reset it multiple times by importing in batches items that have shared metadata. To do so, set the general template to reflect the first batches' metadata and import the items. Then, before importing a second batch of items whose metadata differs from the first batch, change the template to reflect the second batches' metadata. Then, import the second batch of items. Repeat this process as necessary, remembering to update the general template for the batch of items that will be imported next.

Option 2: The second option is to create a template for each set of items that have differing metadata based on their file format. This option would be a good choice if a collection had, for example, a set of photographs (TIFF file) and a collection of digital oral histories (audio file) and both file types (TIFF and audio) had unique metadata. Both of these file formats (TIFF and audio) could have their own template. The photographs' metadata would be entered in the TIFF template. Then, the oral histories metadata would be entered in the audio template. All imported TIFF files would have the metadata in the TIFF template automatically entered upon import. All the audio files would have the metadata in the audio template automatically entered upon import. (See Figure 10)

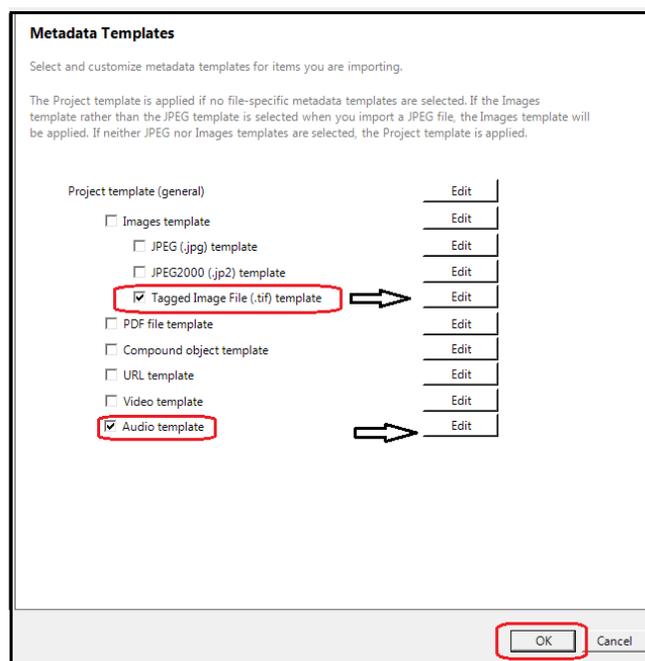


Figure 10: As described in Option 2, the TIFF option was checked, and then its corresponding **edit** button selected. Metadata was then entered specifically for TIFF files. The same steps were then repeated with the Audio Template.

III. Set up Project Settings

A. Define Project Template(s)

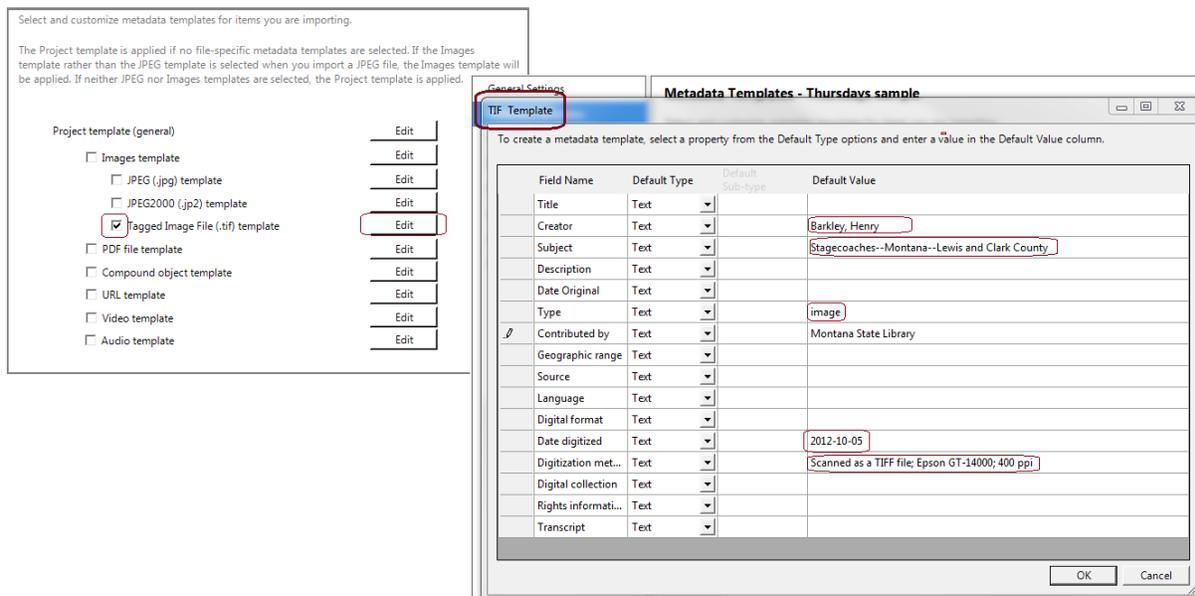


Figure 11: In the example, metadata that is unique to all TIFF files to be imported has been entered and is emphasized by red boxes

To set multiple templates, check the box next to the appropriate file format to have a template created. Then, select **Edit**. The file-specific template will open. Enter in all the shared metadata values for the type of file and select **Okay**. Repeat this as needed for other file-type metadata templates. Select **Ok** in the overall Metadata Templates display when finished.

Note: Any other templates (images, compound objects, audio, etc.) that are created would supersede the general template. For example, if a general and image template were created, all items would have the same metadata automatically entered that was saved in the general template *with the exception* of the metadata entered in the image template, which would be entered for all imported items.

Once the metadata templates have been set in the Project Settings Manager, the OCR license (if applicable) will be activated.

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III. Set up Project Settings

B. Activate OCR License

Any collection that has text documents (e.g. newspapers, pamphlets, books) should use an OCR license to create a searchable text transcript. OCR licenses are available for reservation by contacting the MMP technical support at mmp@mt.gov . Also, OCR licenses must be activated *before* text-based digital files are imported.

1. To activate an OCR license, open the Project Settings Manager (see Figure 8)
2. Select the **OCR** tab in the column and **Activate** (see Figure 12)

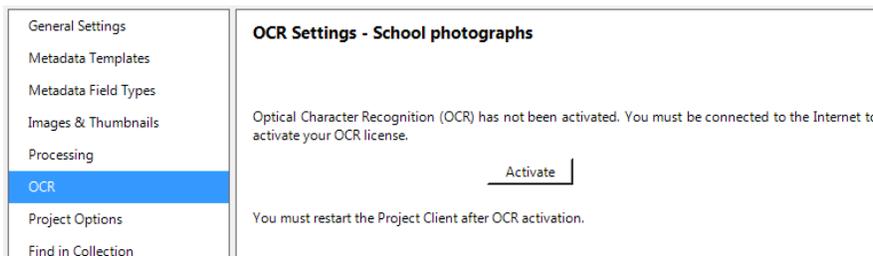


Figure 12. Activate an OCR license

3. Enter in the OCR license when prompted for a serial number (e.g. FEPA-9389-8484-1839. The OCR license and serial number are the same string of letters and numbers)
4. The Project Client **must** be restarted now in order to active your ORC license
5. When the Project Client is reopened, change the settings so an OCR transcript is created. To do so, go to: **Project Settings Manager** and then **Metadata Templates**. Select **edit** next to the appropriate template, and under the field of **transcript**, change the default value from **Text** to **OCR** (see Figure 13 below). Select **Ok**.

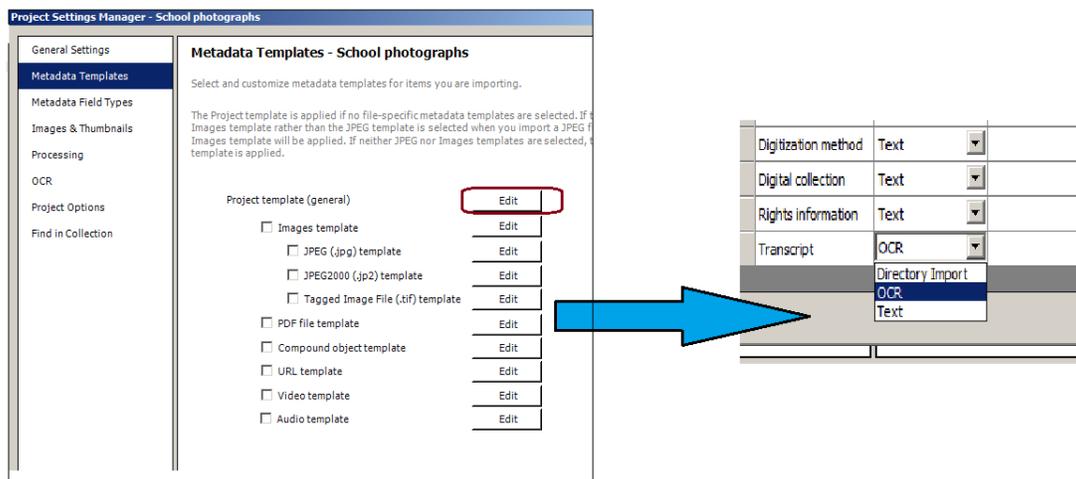
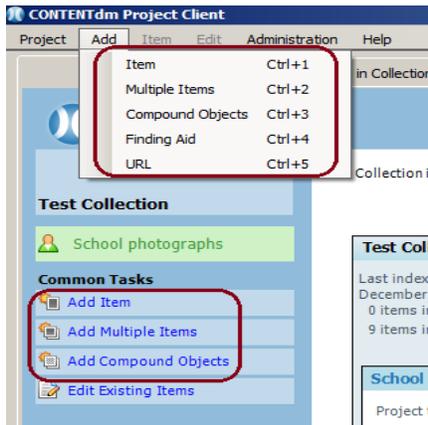


Figure 13. Setting the template to create an OCR transcript

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IV. Import Items

To import an item from your local computer into the Project Client, select the type of item to upload either under the **Add** drop-down menu on the upper tool bar or under **Common Tasks** (shown with boxes in Figure 14).



To add items efficiently into the Project Client, decide if the item is a **single item** (such as a single photo, a single page, or one map), **multiple items** (e.g. photographs, maps) or a **compound object** (an item composed of multiple pages with or without hierarchy). Items are added into the Project Client based on whether they are single, multiple or compound objects.

Figure 14. How to select to import items

A. Compound Objects

If your folder hierarchy was set up as recommended by the MMP (see page 3) each document should have been saved as a compound object. Now

Compound objects can be classified as the following:

- **Documents** (best for objects with multiple sequential pages such as a report, journal, photo album, or related image sets)
- **Monographs** (allows the hierarchical structure of documents, including sections, chapters, and pages to be retained)
- **Picture cubes** (enables a selection of up to six images to link together, such as multiple views of a three-dimensional object) or
- **Postcards** (holds both the front and back images of two-sided items, such as tickets, flyers, and baseball cards).

Contributors will also need to determine if an item is a compound object **with hierarchy** or **without hierarchy**. A document with hierarchy has an internal structure of organization. For example, chapters, volumes, or divisions by years would be hierarchical. A collection of maps or photographs with no internal organization would be **compound objects without hierarchy**. It is recommended to choose “compound object without hierarchy” if page order is the only hierarchy.

As explained in on page 3 (Create a Folder Hierarchy), A compound object must be saved in its own folder with one compound object per folder. For example, if there was a compound object

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IV. Import Items

A. Compound Objects

of a six-sided pamphlet, each of the six items (six sides = six scans) would be stored in the same folder without any unrelated items in the same folder.

To import a compound object:

1. From the open Project Screen, choose **Add Compound Objects** (see Figure 14)
2. Click **Add** next to the default value of Compound Object Wizard (See Figure 15)



Figure 15. The Compound Object Wizard. Select **Add** to import compound objects

3. Select **Document. Document with no Hierarchy** or **Monograph. Document with hierarchy** (See Figure 16)
4. Under “Are the compound object and metadata defined by a tab-delimited text file?” select **No** then **Next** (See Figure 16)

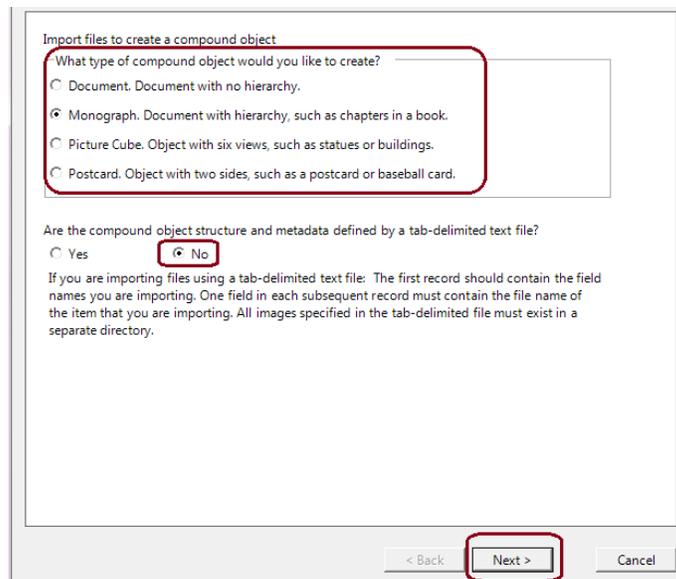


Figure 16. Choose what type of compound object to create. Then, select **Next**

IV. Import Items

A. Compound Objects

5. To the right of the Directory Name blank, choose **Browse**. Navigate to and select the folder for the compound object's digital files. Select the folder, **Okay**, and then **Next**
6. For display image settings, choose "Yes" to **Create Display Image** and **Auto-generate display images**. Then, **Next** (see Figure 17)

Do you want to create display images?

Yes No

Display Image Handling

Auto-generate display images
 Use preprocessed display images

Directory name:

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.

Figure 17.

7. On the next screen, choose how you want your file name to be displayed on the web site (see Figure 18, page 28):
 - a. **Use file names as titles.** This will be successful if you labeled your items with a predetermined and concise file-naming schema (SEE GUIDE on folder hierarchy).
*Also, select to **Ignore information before underscore** if you named files with this option
 - b. **Label pages using sequence:** useful for page-numbered compound objects. Is not the best choice for items with covers, title pages and other pages occurring before what logically would be labeled "Page 1."
8. Select **Generate transcripts using OCR** if you have an OCR license. Select **No transcripts** if you do not have an OCR license and do not need to create text transcripts.
9. Select **Next** (See Figure 18)

IV. Import Items

A. Compound Objects

Specify page names

- Use file names as titles
 - Ignore information before underscore. Example: 001_Page1 becomes Page1
- Label pages using sequence
 - Name: Begin with:
- Label pages using tab-delimited text file

Transcript

- Import transcript files from a directory
 - Directory name:
- Generate transcripts using OCR **Select this option if you have an OCR license**
- No transcripts **Select this option if you do not need a text transcript created**

PDF

- Create print PDF

< Back **Next >** Cancel

Figure 18. Select how to name the compound object's pages. Then,

Next

10. A summary of settings for the imported item will appear. Select **Finish** (see Figure 19)

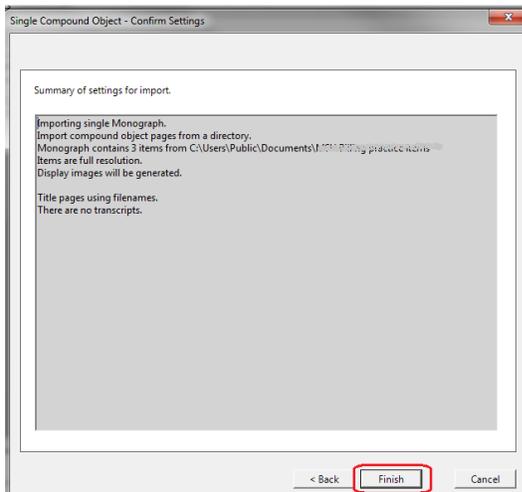


Figure 19. Imported item summary report

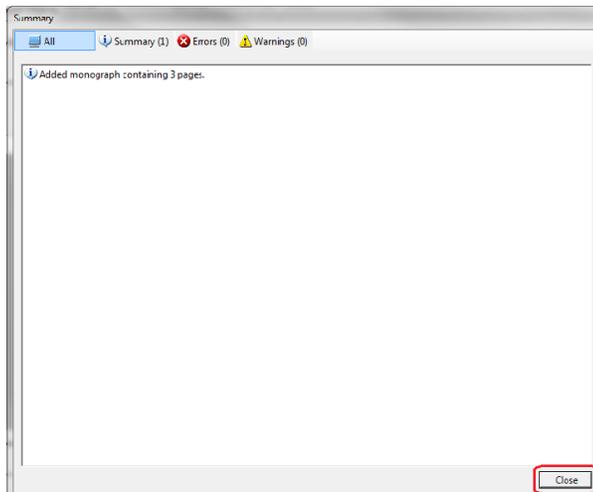


Figure 20. Summary report

11. A summary report will appear, confirming the import. Select **Close** (see Figure 20)

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IV. Import Items

A. Compound Objects

12. You can continue to import compound objects by clicking **Add** and restart the above steps or select **Finish** to import a single compound object (see Figure 21).

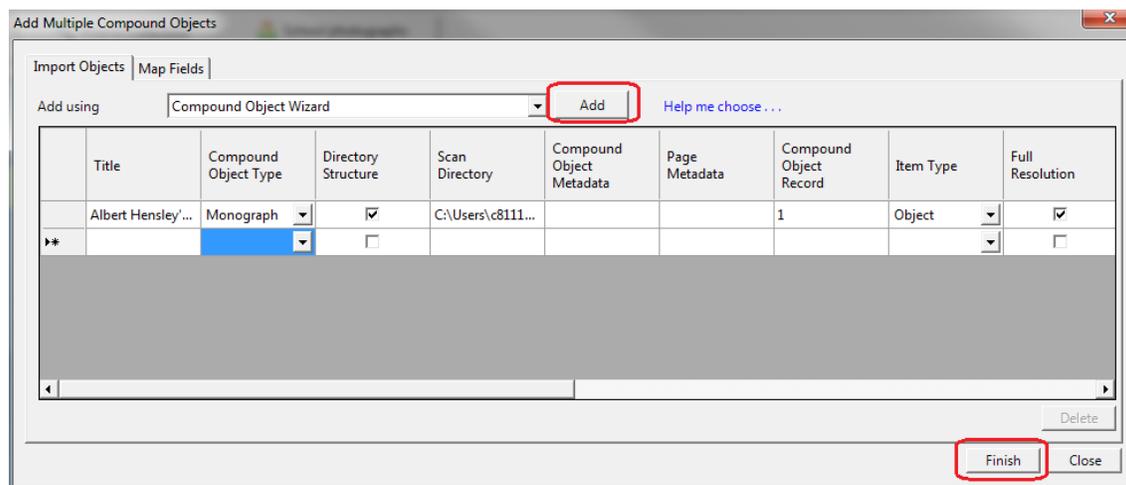


Figure 21.

13. The item(s) will now be viewable in the project spreadsheet

14. The item will now be viewable for editing in the project spreadsheet

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IV. Import Items

B. Single Items

Note: Adding items as single items at an item-by-item rate is the least efficient way to enter items into the Project Client, but useful if only one item needs to be imported.

1. From the open Project Screen, choose **Add Item** (See Figure 14).
2. To the right of the File Name blank, choose **Browse**
3. Navigate to and select the file saved on your computer
4. Select **Open**
5. For display image settings, always choose **Create Display Image** and **Auto-generate display image**
6. Select **Add**

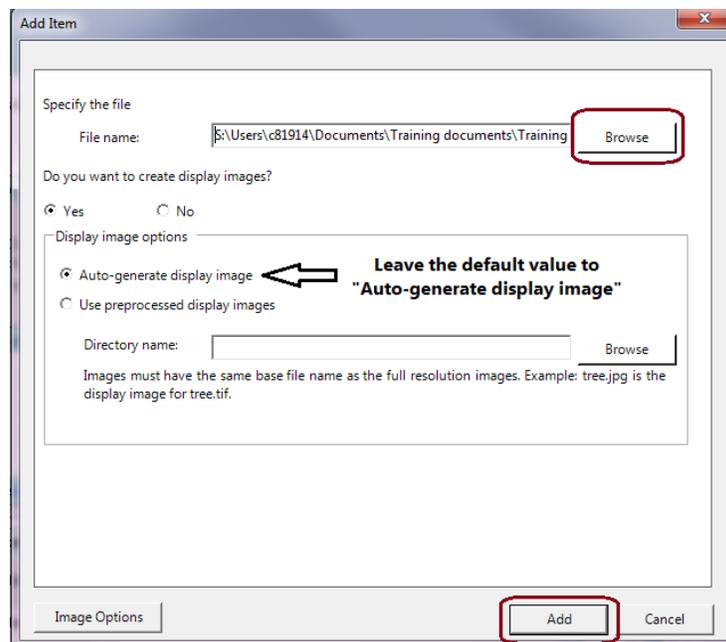


Figure 22. The Add Item Wizard where steps 1-6 of importing a single item are completed

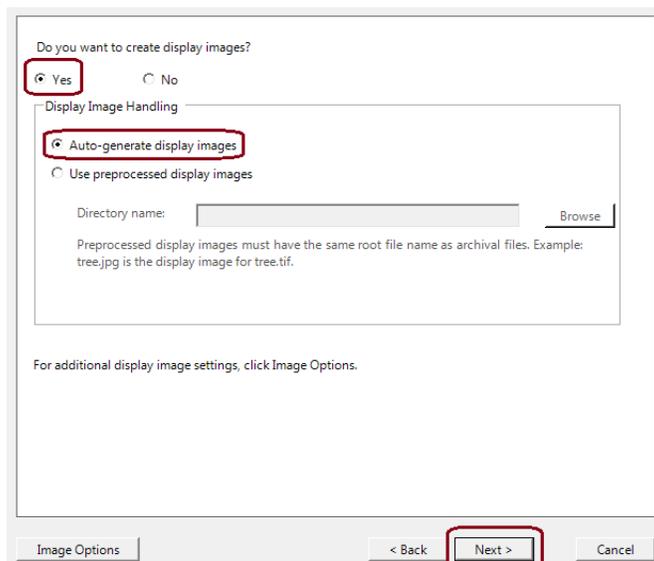
7. **Close** the Summary
8. The item will now be viewable for editing in the project spreadsheet

IV. Import Items

C. Multiple Items

Adding multiple items is like adding *multiple* single items in one efficient batch. When using this function, contributors specify the directory and the Project Client adds all files from that directory to the project spreadsheet. For example, all items in a folder would be added in, regardless of file type.

1. Choose **Add Multiple Items** (See Figure 14)
2. Select **Import From a Directory** (this is the default value)
3. To the right of the Directory Name blank, choose **Browse**. Navigate to and select the folder from your computer. Every item in the selected folder will be imported. Click **Okay**. Then, select **Next**
4. For display image settings, choose **Yes** to create a display image and **Auto-generate display images**
5. Select **Next**



Do you want to create display images?

Yes No

Display Image Handling

Auto-generate display images
 Use preprocessed display images

Directory name:

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.

Figure 23. Steps 4-5 of importing multiple items

6. Confirm the summary of settings for import by clicking **Add items**
7. **Close** the Summary
8. The item will now be viewable for editing in the project spreadsheet

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V. Edit Metadata

There are two possible views for looking at and editing metadata. You can use the project screen spreadsheet view (Figure 24), which is the default view with a thumbnail for all imported items and has the metadata fields listed from the left to the right, or on an item level in the item editing tab (Figure 25). This guide explains how to add and edit metadata in both views.

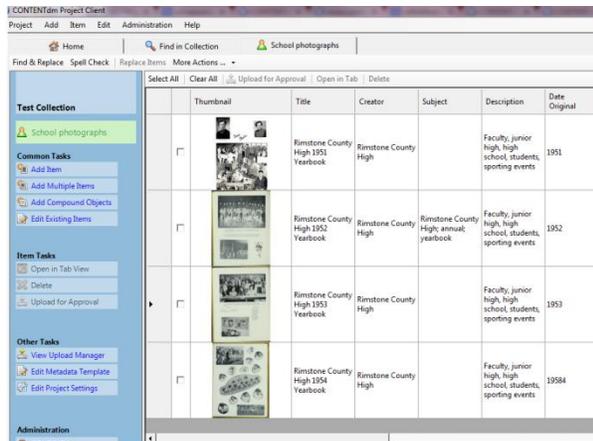


Figure 24. Project screen spreadsheet view

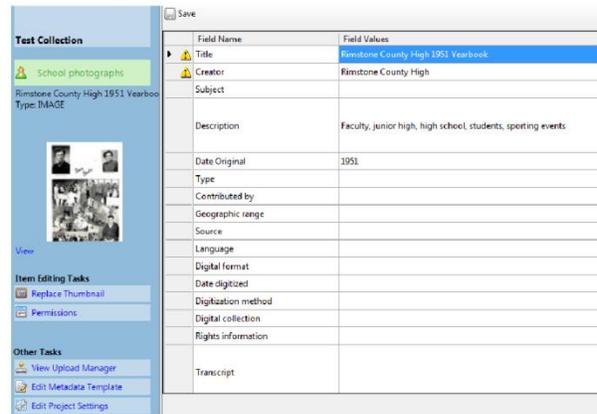


Figure 25. Item editing tab

To view an item individually in the item editing tab, double click on the item's thumbnail image. This individual item view is the best option to view a compound object (all pages are displayed) and edit a compound object's metadata (see Figure 26).

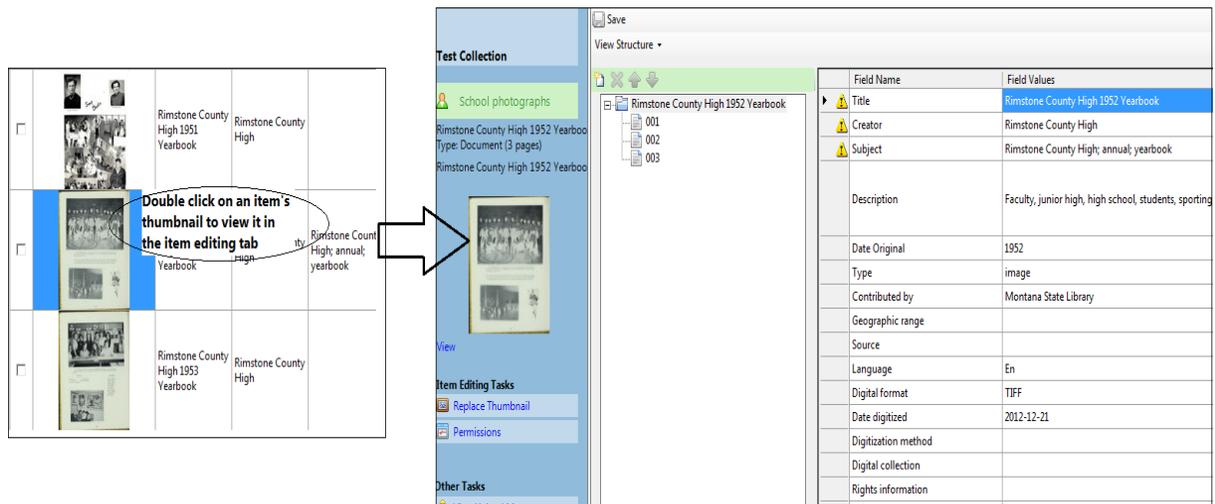


Figure 26. An example of a compound object in the project screen spreadsheet view opened up in the item editing tab

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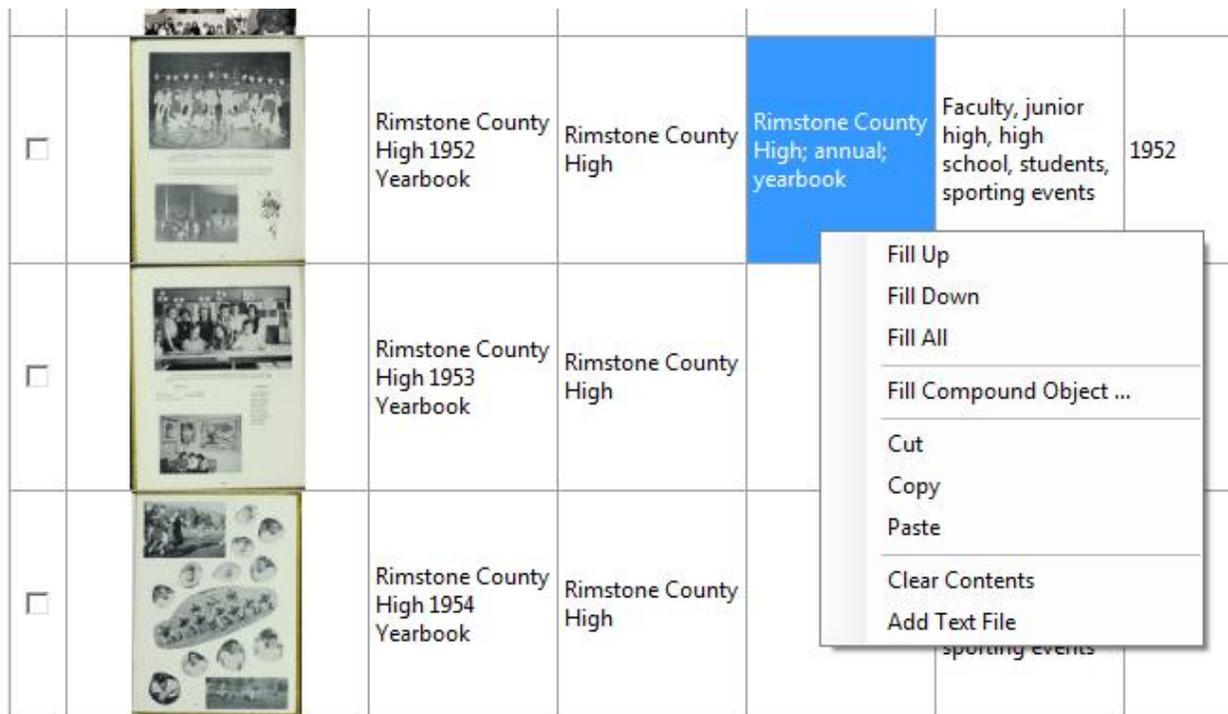
V. Edit Metadata

A. Project Spreadsheet View

The Project Spreadsheet displays after items have been imported to the Project Client. Once an item is imported to the project, it will appear as a row in the spreadsheet along with all other previously imported metadata. You can enter metadata directly into the cells.

How to edit metadata in the Project Spreadsheet:

1. An item's metadata can be edited in the Project Screen spreadsheet view by left-clicking in any white metadata cell. The blank cell will highlight in blue. Type in metadata.
2. To repeat shared metadata between items, click on the appropriate metadata box, enter in the metadata, and select the text by left clicking. Then, right click and select **fill up**, **fill down** to repeat the metadata in a column (see Figure 27).



<input type="checkbox"/>		Rimstone County High 1952 Yearbook	Rimstone County High	Rimstone County High; annual; yearbook	Faculty, junior high, high school, students, sporting events	1952
<input type="checkbox"/>		Rimstone County High 1953 Yearbook	Rimstone County High			
<input type="checkbox"/>		Rimstone County High 1954 Yearbook	Rimstone County High			

Figure 27. To enter in shared metadata, highlight the metadata cell to be repeated by left clicking. Once highlighted, right click and select from the options to fill up, down, all, or fill a compound object.

3. Select **Fill compound object** to apply the metadata to each page of the compound object.
4. An item's metadata can also be cut, copied, and pasted into other items' metadata cells (See Figure 27).

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V. Edit Metadata

B. Item Editing Tab

Metadata entered under the individual item view (in the item editing tab) *must be saved* by selecting **Save** in the upper left of the item screen or **Close** and then selecting **Yes** to save changes.

1. As with the Project Screen spreadsheet view, metadata is added by left-clicking on a blank metadata field (which will highlight the field in blue) and typing.
2. Again, changes made to an item and its metadata must be saved by selecting **Save** in the upper left or right.

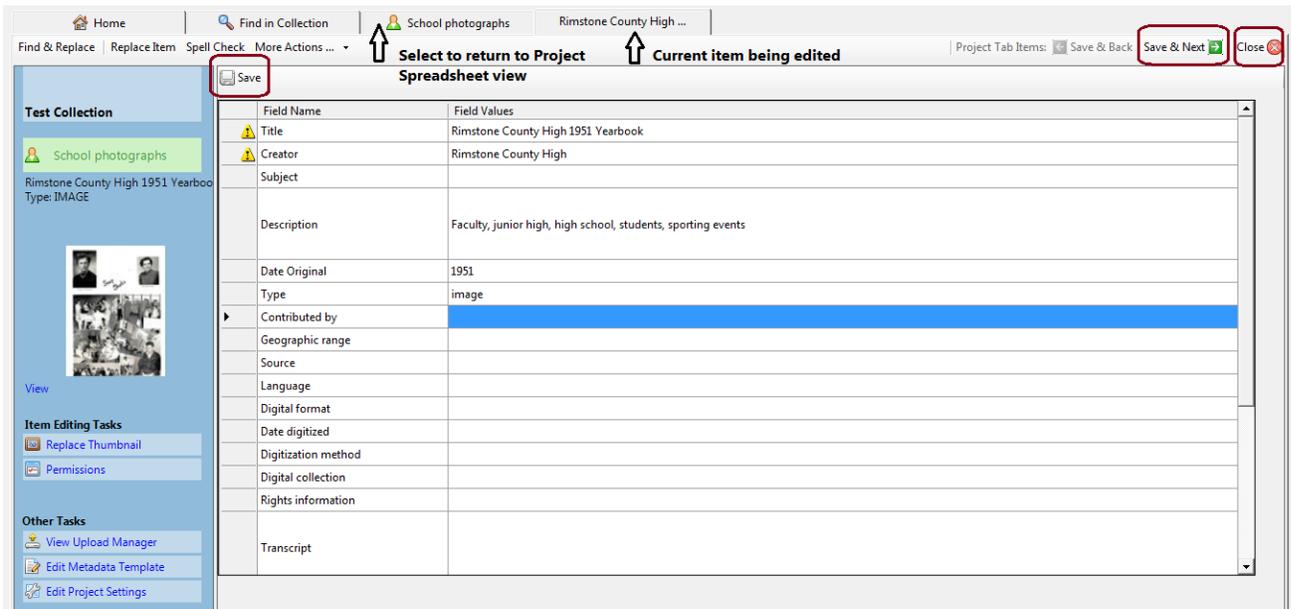


Figure 28. Editing in the item editing tab. Save and Close options are highlighted by red boxes

Another feature in the Item Editing tab is the option to view the imported image larger than the thumbnail view permits.



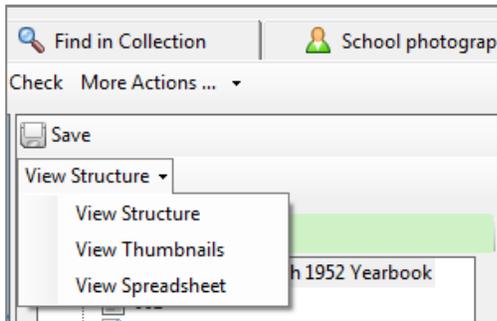
Figure 29. Select the **View** option to see a larger display of an item's image

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V. Edit Metadata

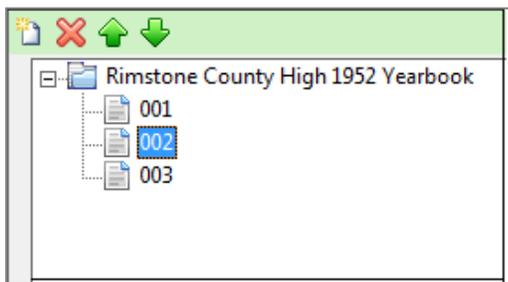
B. Item Editing Tab

i. Navigation in the Item Editing Tab



Once a compound object is opened in the item editing tab, there are multiple view options available. Explore these to find out what personally works best for you.

Figure 30. Compound object view options



While in the item editing tab, select a page to edit by left clicking under the compound object level-record. Pages can also be deleted (red x) or rearranged (green arrows).

Figure 31. Page 002 has been selected to be edited and its metadata would display for editing

Metadata must be entered for each page of a compound object. An overall compound object metadata summary is listed at the top of the object level-record. Page-level metadata is viewable by selecting the specific page (see Figure 32).

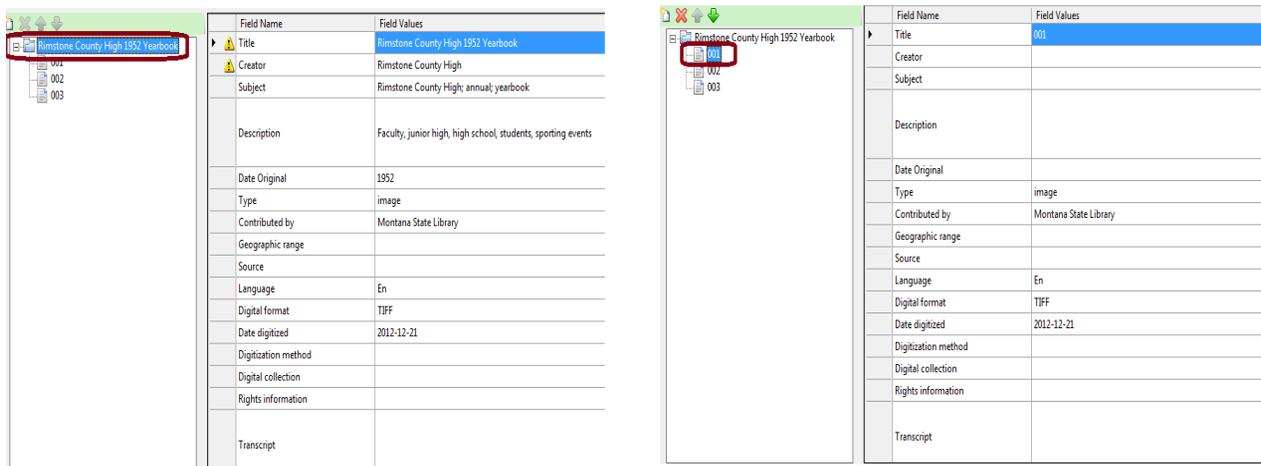


Figure 32. The image on the left is the metadata in summation for the Rimstone County High 1952 Yearbook. The image on the right shows the specific metadata for page 1 (named 001) of this yearbook. **Note:** the overall compound object metadata differs from the metadata for page “001” which needs to be edited for this example project

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V. Edit Metadata

C. Supplemental Metadata Information

When working with adding in and editing metadata, please note the following information:

By clicking on the checkbox to the left of an item's thumbnail image, you can choose to: 1) Select all the items 2) Upload the item for approval (the final step of working with an item in the Project Client), 3) Open the item in the item editing tab, or 4) Delete the item.

Select All Clear All Upload for Approval Open in Tab Delete			
	Thumbnail	Title	Creator
<input checked="" type="checkbox"/>		Rimstone County High 1951 Yearbook	Rimstone County High

Figure 33. Item options in the Project Screen

Spreadsheet View

While working in the Project Spreadsheet and item editing tab, a red exclamation point or triangular yellow exclamation point may appear. Hover the mouse over the warning for information. In the example below, the title field is blank. The metadata field values of title, creator, subject, description, and date original are required metadata fields.

	Thumbnail	Title	Creator	Subject	Description
			Rimstone County High	Rimstone County High Annual; yearbook	Faculty, junior high, high school, students, sporting events

Figure 34. Items that have blank required metadata fields are flagged by a red icon until metadata is entered.

A yellow warning triangle appears for all metadata that contains a spelling error. Take these warnings with a grain of salt. Local vocabulary such as Wibaux, Meagher, Ekalaka, Pend d'Oreille, Knieval, and Marias all prompted the yellow warning sign. If this occurs, confirm the spelling is correct and continue on.

Field Name	Field Values
Title	Rimstone County High 1951 Yearbook
This field contains a spelling error.	Rimstone County High
Subject	
Description	Faculty, junior high, high school, students, sporting events

Figure 35. Examples of spelling error notifications

VI. Upload Items for Approval

Once an item has been imported into the Project Client and its metadata is correctly entered, it can be uploaded for approval in CONTENTdm Administration. There are no restrictions on the number of items that can be uploaded at a time though the time to upload is proportional with the number of items uploaded.

1. Choose **Select All** in the spreadsheet view to upload all items or (see Figure 33)
2. Selecting items individually by clicking the check box to the left of the item's thumbnail image and
3. Click **upload for approval**

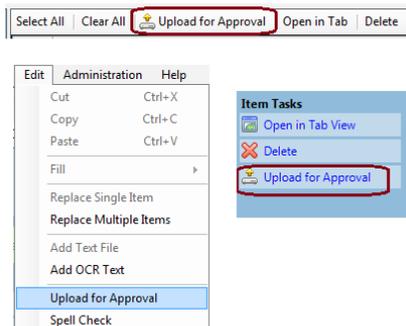


Figure 36. Ways to begin uploading items for approval

4. All of the items in the spreadsheet will disappear
5. View the **Upload Manager** (lower left of the screen) to see the progress of your upload

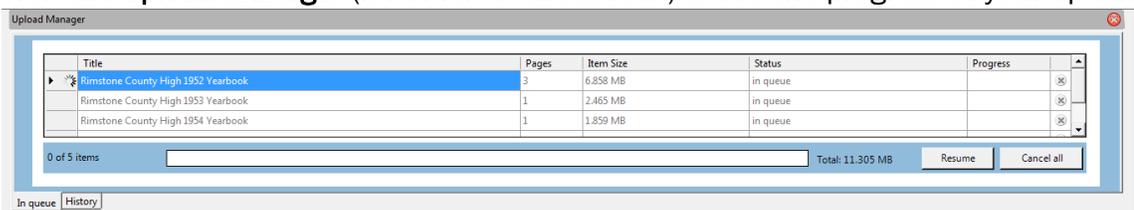


Figure 37. View the status of uploading items with the Upload Manager

6. Open up **CONTENTdm Administration**

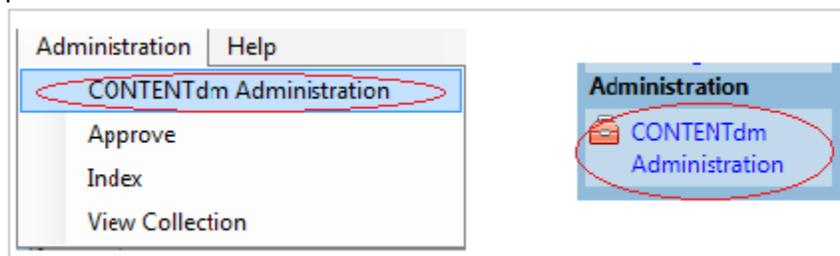


Figure 38. How to open up CONTENTdm Administration

VII. Editing a Collection That Has Been Previously Approved and Indexed

Once a collection has gone through CONTENTdm's Project Client and Administration, there are two options to edit or change a collection. These edits and changes include:

- Delete an item
- Edit metadata
- Change the structure of an item (the page order)

Examples of what this feature allows:

- All metadata can be edited
- Transcripts can be manually entered or edited (in the transcript metadata field)
- A compound object's ordering can be rearranged (in the item editing view only)

Steps to pulling an item back into the Project Client (from CONTENTdm Administration):

- 1) Open up the Project Client
- 2) Open the specific project where the item to be edited was created (via the **Project** tab > **Open**)
- 3) In the Project Spreadsheet view, click **Find in Collection** on the upper toolbar
- 4) Search for the item by using either the search bar to the left, the advanced search option, or by viewing all items with the **browse collection** option.
- 5) Once you have located the item(s), place a checkmark next to the item's thumbnail view and then click on "Add to Project (edit)" (see figure below)
- 6) All selected files will now be available for editing under the project spreadsheet view or item editing tab.
- 7) Make necessary edits
- 8) Upload for approval
- 9) Contact the MMP administrator and request approval.

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VII. Editing a Collection That Has Been Previously Approved and Indexed

A. Editing via the Project Client

Find in Collection | School photographs **Must be in the project's collection**

Search | My Advanced Search | Browse Collection | Preferences

Browse Collection

Select All | Clear All | Add to Project (edit) | View Item on Web ↗

	Thumbnail	Title	Creator	Subject	Description	Date Original
<input type="checkbox"/>		001			sample for MS...	
<input checked="" type="checkbox"/>		005		Sample for MS...		
<input type="checkbox"/>		012		Sample for MS...		

From the top to the bottom of the screen, please notice:

Project collection: The tab entitled “School photographs” is the project’s name. The project must be opened in order to do a search.

Find in collection (in red frame): there is a search bar to the left where an item could be searched for. This option must be selected to locate the item. Other search options are available afterwards. These include:

- **Search:** has a search bar to the left for keyword searches
- **Advanced Search:** can search by metadata fields
- **Browse collection:** brings up all items in the collection

The **checkmark:** items to be edited must be selected with a checkmark and then chosen to **Add to Project** (follow black arrow).

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IX. Resources and Contact Information

CONTENTDM USER SUPPORT CENTER

Please navigate to the **User Support Center**: <http://www.contentdm.org/USC>. The User Support Center is full of free forums, guides, and online trainings to guide you as you work in the CONTENTdm software.

Everyone should have their own user name and password. Sign up by using the **organization ID** of **MTSL1034**.

Where to find help:

- Search feature
- Training & Events tab
- Knowledgebase tab
 - All Tutorials
 - All Help Files Version 6

Montana Memory Project

Montana Memory Project: Contributing Institution Agreement

(Your institution) _____ agrees to the following as a Contributing Institution of the Montana Memory Project (hereinafter referred to as “MMP”):

- To read and comply with the MMP Guidelines prior to beginning digitization and the creation of metadata
- To read and observe the MMP Collection Policy Scope and Purpose
- To submit a completed MMP Project Planning Document for each new collection the Contributing Institution wishes to create in the MMP, for review by the MMP Steering Committee
- To keep new collections unpublished until at least 1 image and related metadata has been added.
- To make its MMP content available at the Collection level and/or Item level in WorldCat, through the CONTENTdm Digital Gateway tool or Connexion Digital Import
- To ensure that URLs to images remain functional, wherever metadata in the MMP points to content residing on a server other than the MMP hosted site
- To commit to the long-term preservation and accessibility of digital master files by either a) depositing digital master files that correspond to access files in the MMP in the statewide OCLC Digital Archive subscription or b) developing and maintaining an appropriate long-term preservation solution in-house for digital master files.
- To contribute to the ongoing growth and success of the MMP through such efforts as local web-page links to MMP collections, assisting new institutions, continuing to contribute content, sharing technical expertise and promoting the statewide nature of the collection

MMP Mission Statement: The Montana Memory Project encourages cooperation between Montana's cultural institutions and its citizens in order to bring both historic and contemporary resources to the digital age.

Signature

Institution Name

Date
