



Getting started with the ContentDM Project Client part 5: Adding files to your project

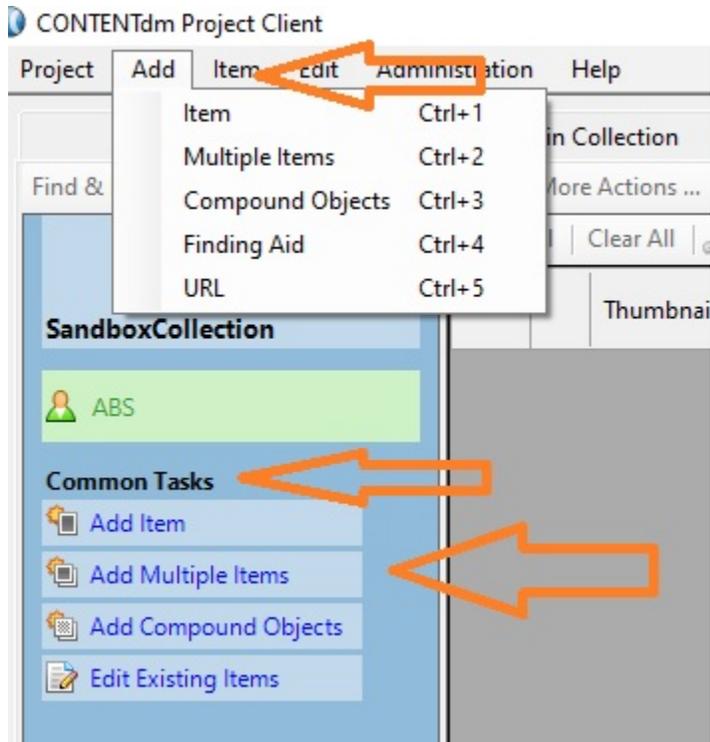
Now that your metadata template and identification bands are set up, it's time to pull your files into the project so you can start adding metadata. Be sure you know where your files are! If you're adding multiple files, and generally you will be, make sure they're in a folder that contains just them and nothing else. It won't break the system if you have other files in there, but it's easier not to add them in the first place, than to either have to deal with error messages for unsupported file types or to have to delete unwanted ones.

Another helpful hint: try and keep the number of files you import to less than 50 or so. You can add more than that, up to about 500-600. Doing that many at once is not a good idea when you're adding initial metadata because the Project Client app will slow down during certain tasks when it has to handle a lot of files. The other reason to keep it to less than 50 is that it's easy to get bogged down and feel like you're not making any progress as you add metadata. In addition, it's often harder to proofread your work prior to upload if you have a lot of records to check. You'll find what amount works best for you over time.

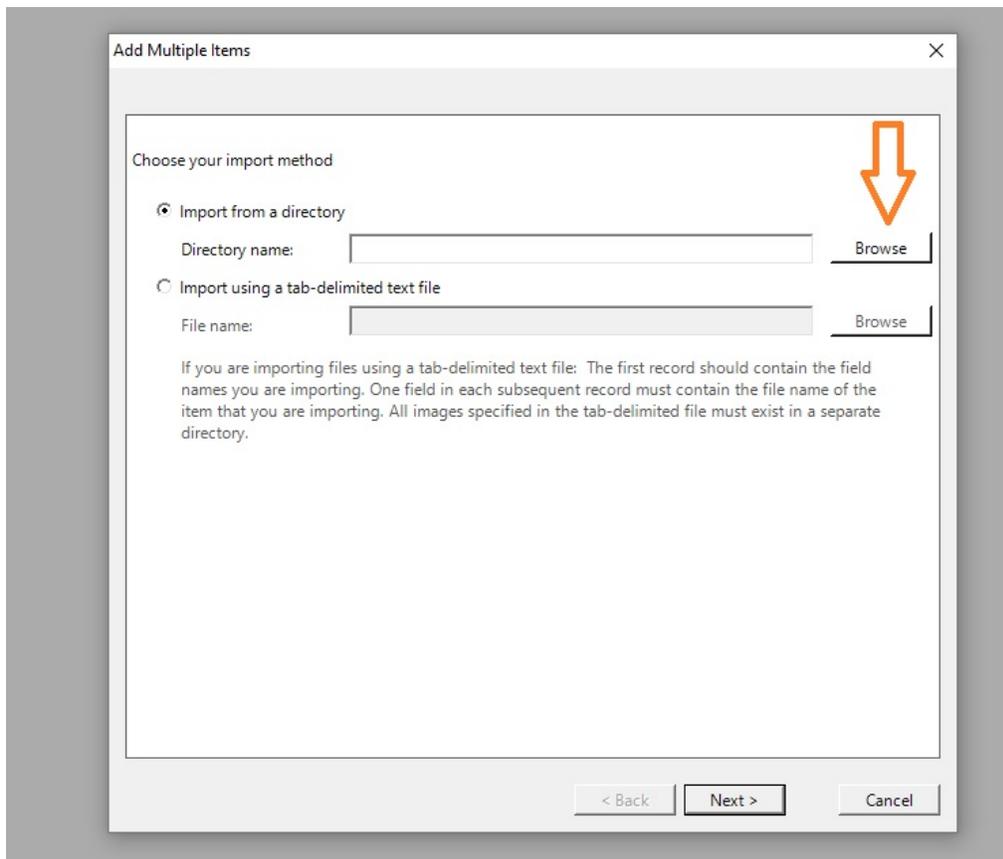
First, click on the Project tab.

This will take you into the project screen.

You can add files from two places on this screen. One is the Add button on the very top toolbar, the other are the buttons under the Common Tasks header on the left hand blue menu. They're not quite the same options, so use whatever is appropriate for what you are uploading. If you're primarily uploading image files, you can use either. If you're creating records that will point to a URL, you'll want to use the drop down menu on the toolbar. (See the File Types and Formats guide for more information about why you might be adding a URL.)

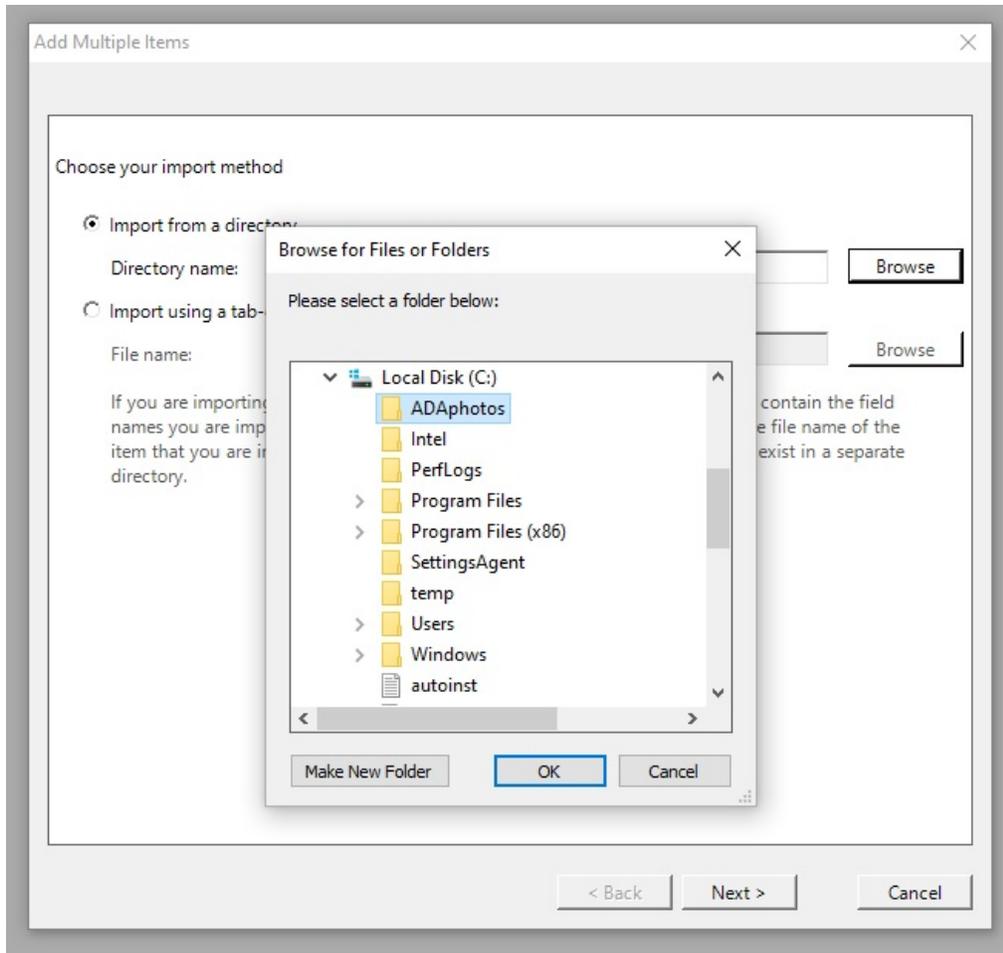


If you click on Add Multiple Items, you'll see a new pop-up screen.

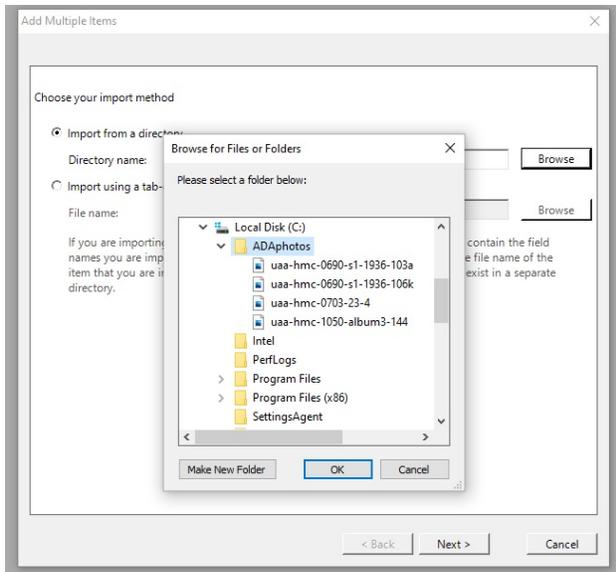


Use the Browse button to go find your folder. You'll see there's a second option there. This can be used if you have all (or most) of the metadata already formatted and in a tab-delimited text file. This is actually a complicated process to connect these with the image files, so in general you will most likely not be importing things using this option. If you'd like to follow up on this, please contact the Statewide project coordinator for more details, it won't be covered in this set of guides.

Select the folder that contains the items, rather than clicking on the items themselves.

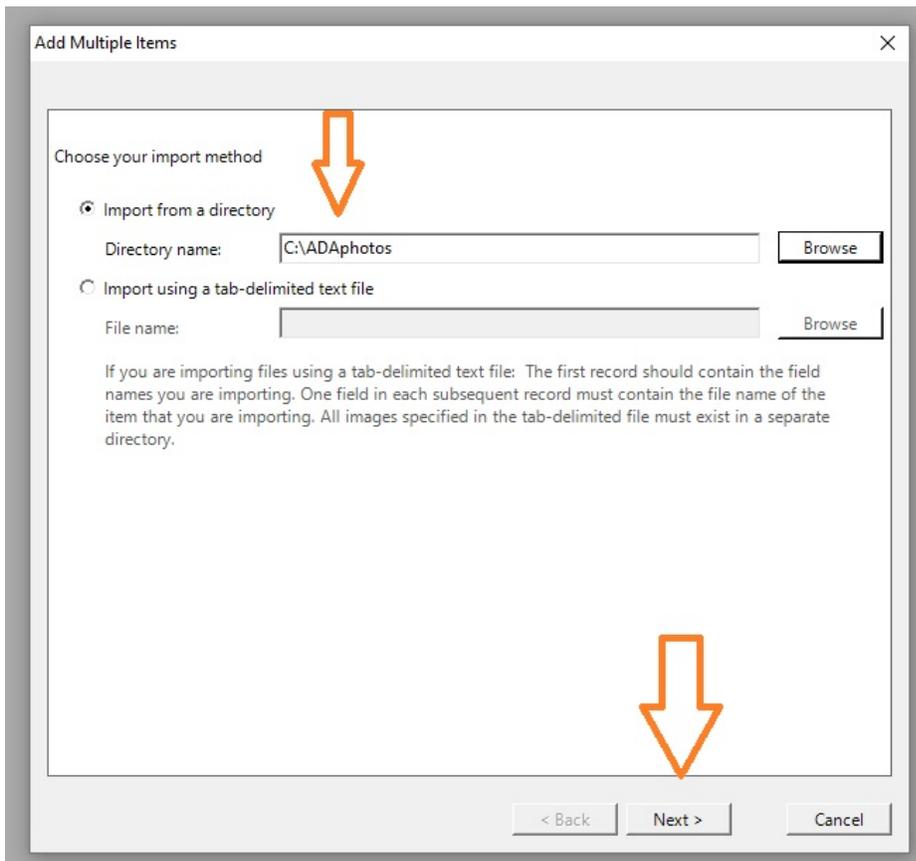


When you click on the folder name, the listing will expand out so you can see the files listed underneath.

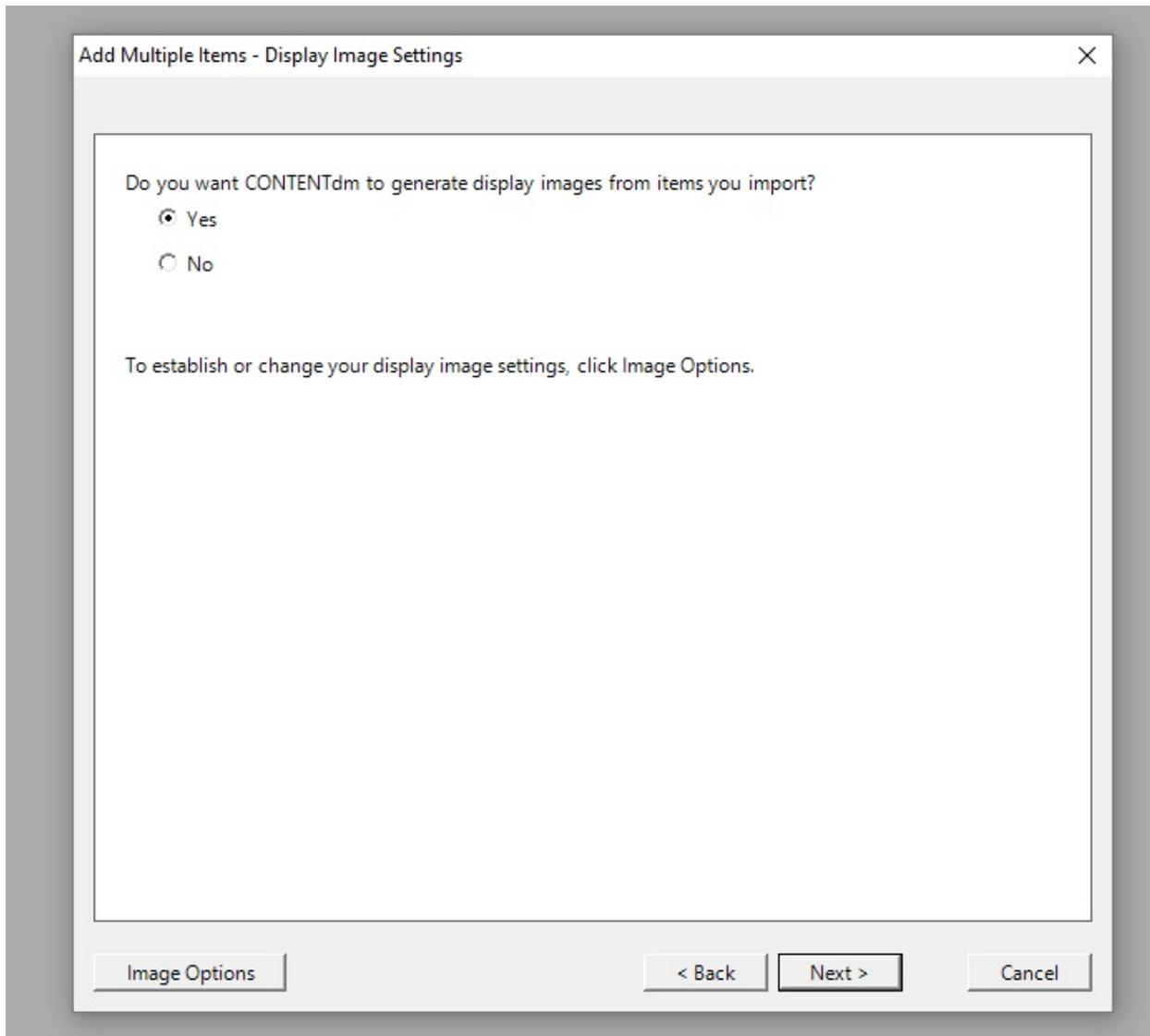


Click the OK button.

You'll be taken back out to the previous pop-up window and should see your file path in the Directory Name field. Click on Next at the bottom of the screen.

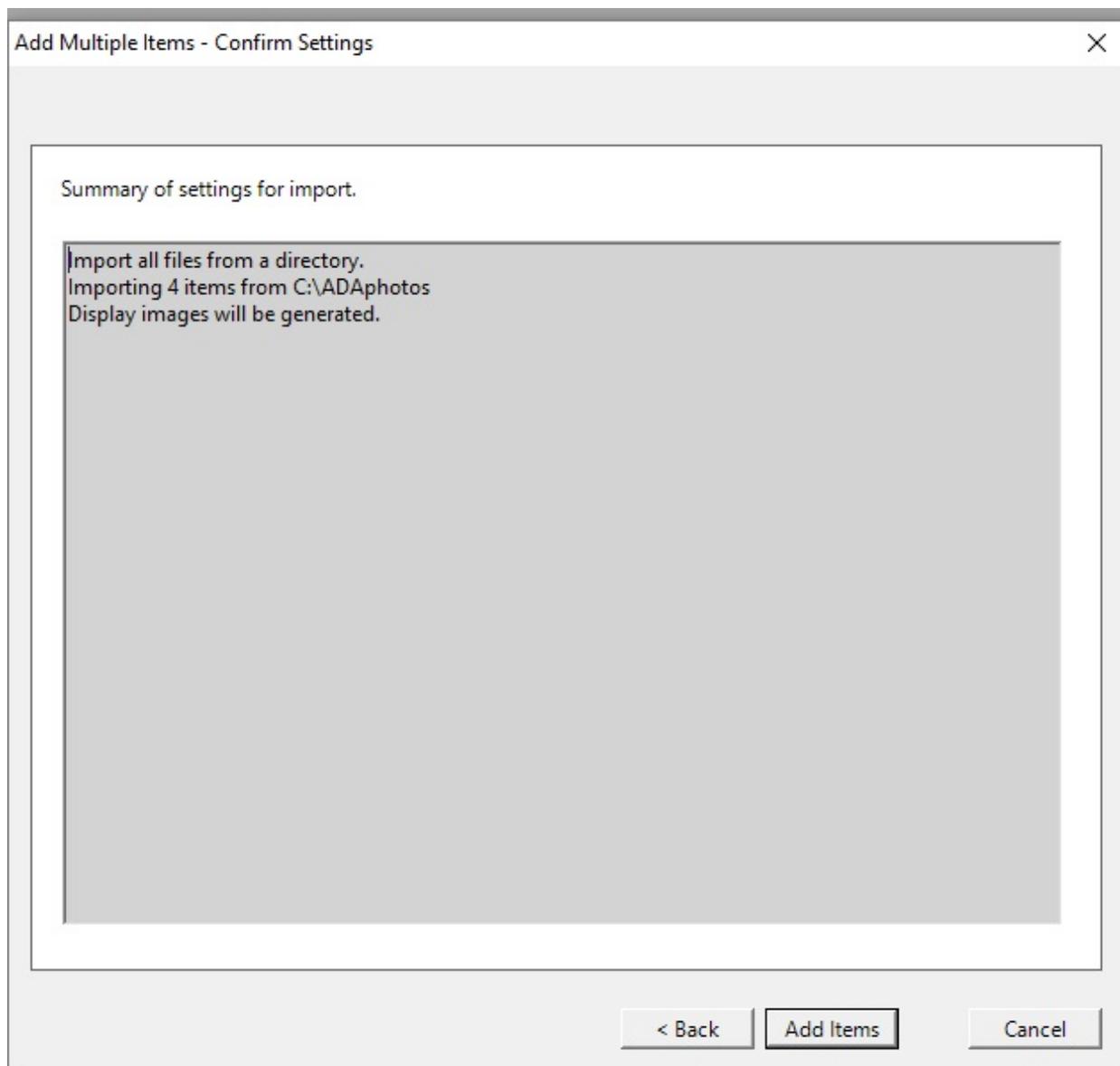


This will take you to the window that asks you about “display images.” These are the small size images, thumbnails, that appear on the results screens on searches on the website. You will accept the default option for almost every file type that you upload. Exceptions may include file types like a/v media or URLs where you can upload a custom thumbnail if you so choose. If you have any questions about custom thumbnails, please contact the Statewide project coordinator for more details. If you are uploading photographs or other image files and accept the default setting, ContentDM will automatically create a thumbnail sized image from the image file you are uploading.



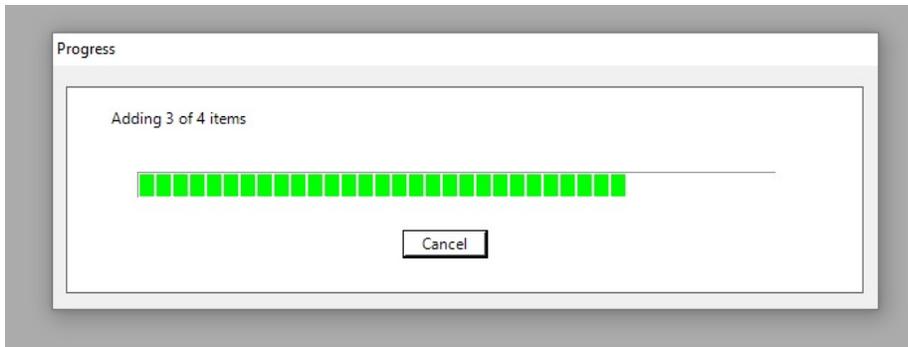
Click on the Next button.

You'll now be taken to a pop-up screen that allows you to confirm your settings for your import.

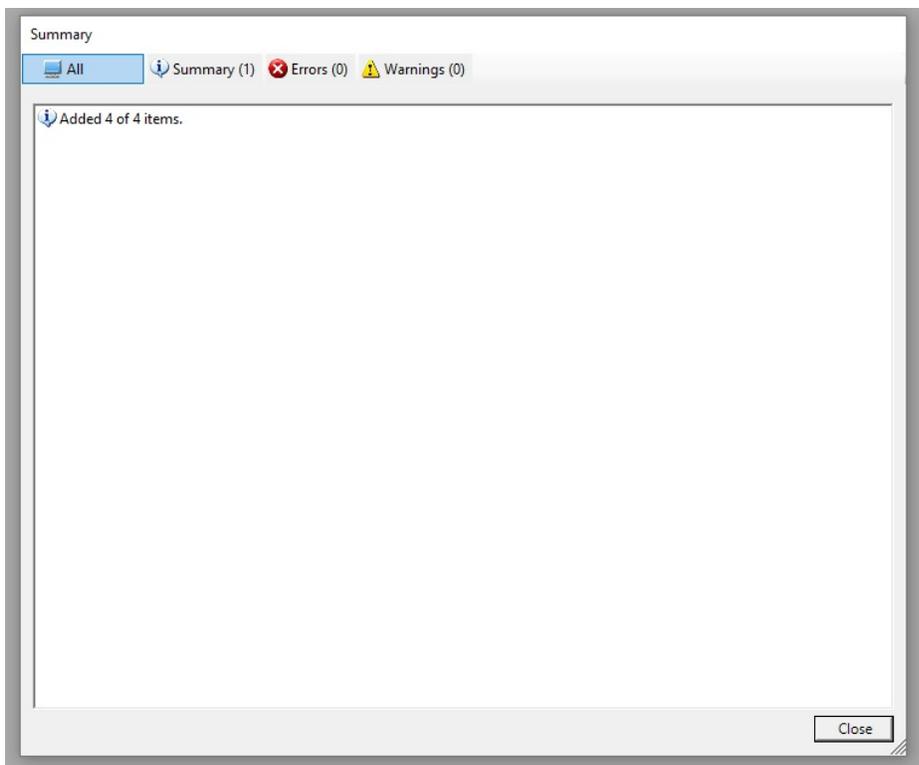


You'll see here that you've chosen to import all the files from that folder, how many files there are, the folder name, and that you've chosen to allow ContentDM to create the thumbnails. Click on the Add Items button on the bottom of the window.

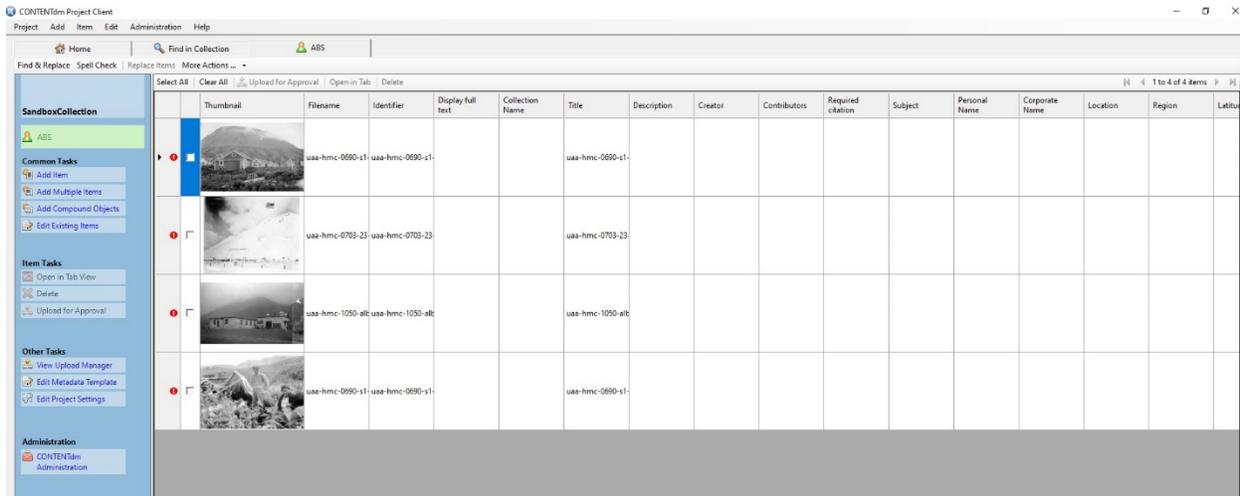
You'll get a progress window. This process may be quick if you only have a few files or the files aren't very large.



Once the import has closed, you'll get a report screen. It will tell you if a file has not been imported (maybe due to an unsupported file type). Mostly, however, it will look like the following.



If this all looks correct, go ahead and click on the Close button at the bottom of the screen. You'll be taken back out to the main screen of your project. It will look like a spreadsheet, with a column for the image thumbnail, and columns for each of the metadata fields. If you've pre-set any of your fields in the metadata template, you will see that those fields have already been filled in. It may take a moment for the thumbnails to show up. If you have a lot of images in your folder, it may take quite a while.

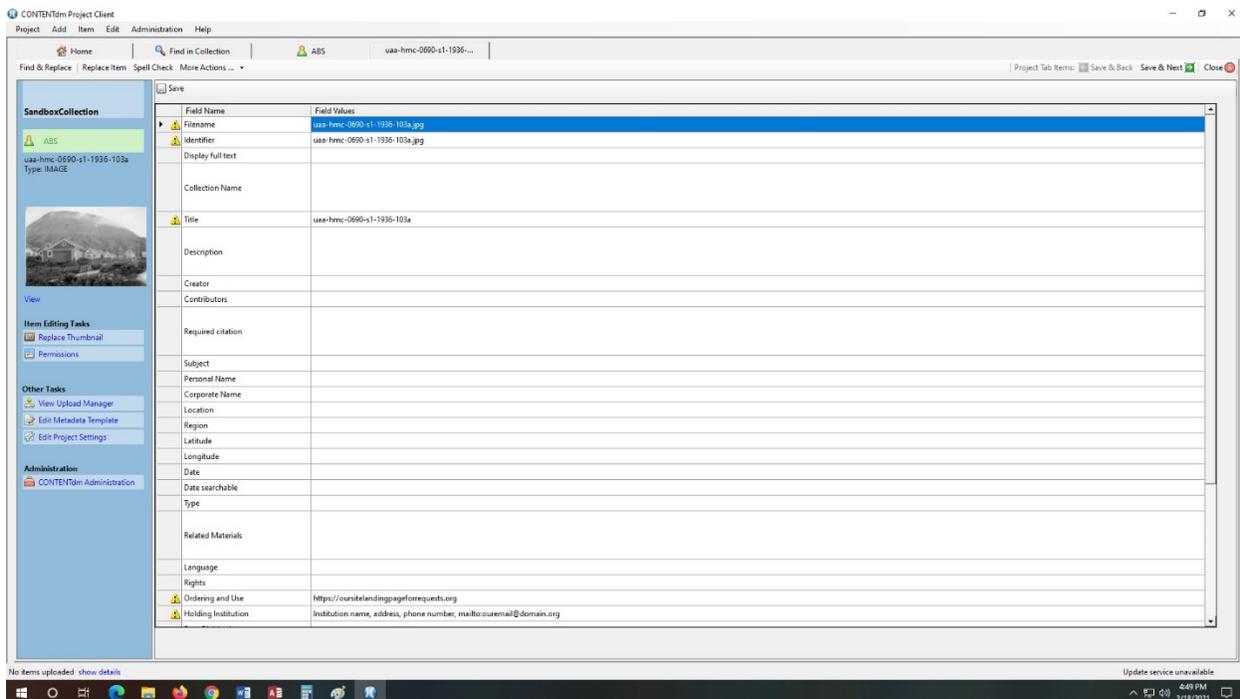


The screenshot shows the CONTENTdm Project Client interface. On the left is a sidebar with navigation options: SandboxCollection, Common Tasks (Add Item, Add Multiple Items, Add Compound Objects, Edit Existing Items), Item Tasks (Open in Lab View, Delete, Upload for Approval), Other Tasks (View Upload Manager, Edit Metadata Template, Edit Project Settings), and Administration (CONTENTdm Administration). The main area displays a table with the following columns: Thumbnail, Filename, Identifier, Display full text, Collection Name, Title, Description, Creator, Contributors, Required citation, Subject, Personal Name, Corporate Name, Location, Region, and Latitude. The table contains four rows of data, each with a thumbnail image and corresponding metadata values.

Thumbnail	Filename	Identifier	Display full text	Collection Name	Title	Description	Creator	Contributors	Required citation	Subject	Personal Name	Corporate Name	Location	Region	Latitude
	uaa-hmc-0690-s1	uaa-hmc-0690-s1			uaa-hmc-0690-s1										
	uaa-hmc-0703-23	uaa-hmc-0703-23			uaa-hmc-0703-23										
	uaa-hmc-1050-alt	uaa-hmc-1050-alt			uaa-hmc-1050-alt										
	uaa-hmc-0690-s1	uaa-hmc-0690-s1			uaa-hmc-0690-s1										

This is a good time to do a quick check and fix if either the metadata template did not apply or the bands were not applied. For the metadata template, take a quick look at one of the fields you pre-set in the template: you should be able to see it easily here. Is it showing up? Yes? Good. If not? Check the bands first to make sure those pulled in as well. Yes? Great. If not? Now it's time to fix those things.

To check if the Band has been applied, double-click on one of the thumbnails. This will bring you into the item record. This is the screen where you'll add a lot of your metadata, so it will become familiar quickly. It will look like this:



The screenshot shows the CONTENTdm Project Client interface with the item record for 'uaa-hmc-0690-s1-1936-103a' open. The left sidebar shows the item's thumbnail and a 'View' link. The main area displays a form with the following fields and values:

Field Name	Field Values
Filename	uaa-hmc-0690-s1-1936-103a.jpg
Identifier	uaa-hmc-0690-s1-1936-103a.jpg
Display full text	
Collection Name	
Title	uaa-hmc-0690-s1-1936-103a
Description	
Creator	
Contributors	
Required citation	
Subject	
Personal Name	
Corporate Name	
Location	
Region	
Latitude	
Longitude	
Date	
Date searchable	
Type	
Related Materials	
Language	
Rights	
Ordering and Use	https://oursiteandingspageforrequests.org
Holding Institution	Institution name, address, phone number, mailboxemail@domain.org

The bottom of the screen shows the Windows taskbar with the time 4:49 PM on 2/19/2021.

Click on the View link just below the thumbnail image on the left hand blue column menu.

CONTENTdm Project Client

Project Add Item Edit Administration Help

Home Find in Collection ABS uaa-hmc-069

Find & Replace Replace Item Spell Check More Actions ...

SandboxCollection

ABS

uaa-hmc-0690-s1-1936-103a
Type: IMAGE

View

Item Editing Tasks

Save

	Field Name	Field Values
▶	Filename	uaa-hmc-0690-s1-1936-103a.jpg
▶	Identifier	uaa-hmc-0690-s1-1936-103a.jpg

Item Viewer

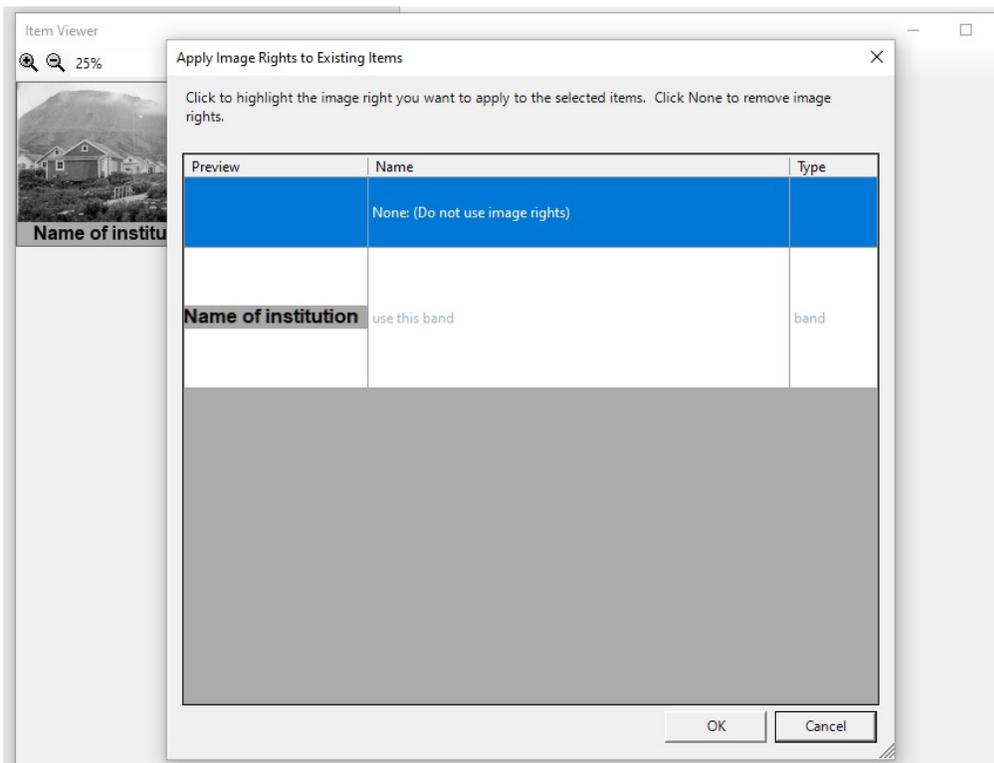
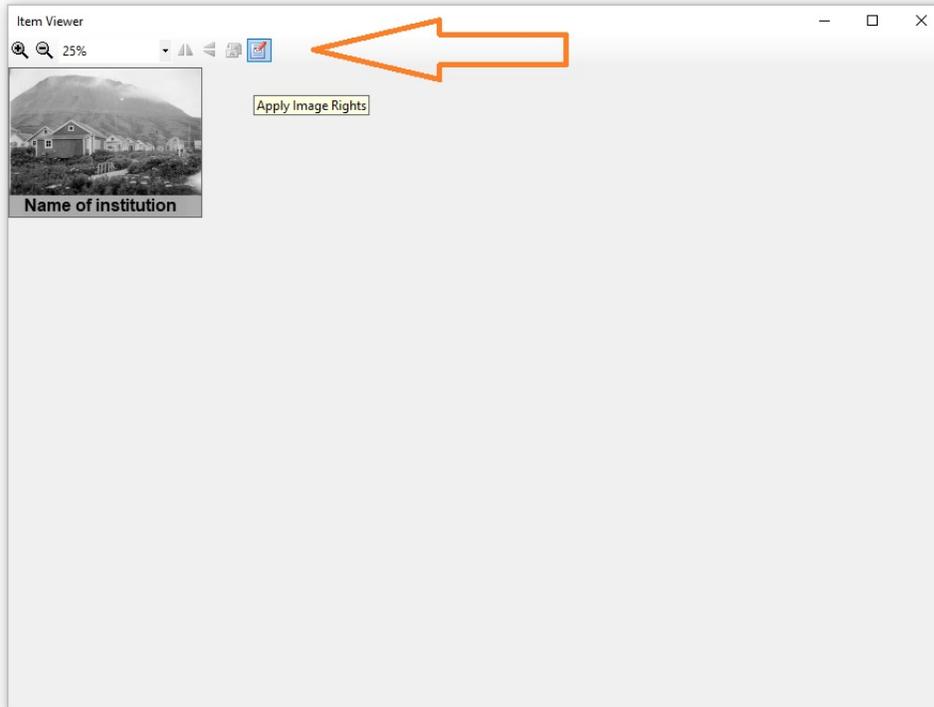
25%



Name of institution

You should see the band applied at the bottom of the image.

If it's not there, the band has not been applied. You have a couple of options at this point if you need to re-apply the metadata template or the band or both. If you have only a very few items in your project, you can just add them manually to each item. For the metadata, that will be covered in the Adding Metadata tutorial. For the band, in the Item Viewer pop-up window, you'll see a little icon on the far right of the menu header. If you click on that, you'll bring up the Image Rights pop-up window that will allow you to add the band to this item.



From this screen, you can select the band you want. When you do, it will be highlighted in blue. Then click the OK button at the bottom of the window and your band will be applied. Close the Item Viewer pop-up with the little X button in the upper right hand corner.

If you have more than a few items imported though, this is too much work to do them individually. Go back out to the main project screen by clicking the Close button with the little red X in the upper right of the item metadata screen. From the project screen as shown below, Select all items, and Delete.

CONTENTdm Project Client

Project Add Item Edit Administration Help

Home Find in Collection ABS

Find & Replace Spell Check Replace Items More Actions ...

Select All Clear All Upload for Approval Open in Tab Delete

	Thumbnail	Filename	Identifier	Display full text	Collection Name
 <input type="checkbox"/>		uaa-hmc-0690-s1	uaa-hmc-0690-s1		
 <input type="checkbox"/>		uaa-hmc-0703-23	uaa-hmc-0703-23		
 <input type="checkbox"/>		uaa-hmc-1050-alb	uaa-hmc-1050-alb		
 <input type="checkbox"/>		uaa-hmc-0690-s1	uaa-hmc-0690-s1		

SandboxCollection

ABS

Common Tasks

- Add Item
- Add Multiple Items
- Add Compound Objects
- Edit Existing Items

Item Tasks

- Open in Tab View
- Delete
- Upload for Approval

Other Tasks

- View Upload Manager
- Edit Metadata Template
- Edit Project Settings

You have the option to delete from two different places on the screen. You can do it from the tab menu where you found the Select All button, or there's also a Delete option under Item Tasks on the left hand blue menu column.

CONTENTdm Project Client

Project Add Item Edit Administration Help

Home Find in Collection ABS

Find & Replace Spell Check Replace Items More Actions ...

Select All Clear All Upload for Approval Open in Tab Delete

	Thumbnail	Filename	Identifier	Display full text	Collection Name	Title
<input checked="" type="checkbox"/>		uaa-hmc-0690-s1-	uaa-hmc-0690-s1-			uaa-hmc-0690-s1-
<input checked="" type="checkbox"/>		uaa-hmc-0703-23-	uaa-hmc-0703-23-			uaa-hmc-0703-23-
<input checked="" type="checkbox"/>		uaa-hmc-1050-alb	uaa-hmc-1050-alb			uaa-hmc-1050-alb
<input checked="" type="checkbox"/>		uaa-hmc-0690-s1-	uaa-hmc-0690-s1-			uaa-hmc-0690-s1-

SandboxCollection

ABS

Common Tasks

- Add Item
- Add Multiple Items
- Add Compound Objects
- Edit Existing Items

Item Tasks

- Open in Tab View
- Delete
- Upload for Approval

Other Tasks

- View Upload Manager
- Edit Metadata Template
- Edit Project Settings

Administration

- CONTENTdm Administration

Now Click on Edit Metadata Template from the left hand column under Other Tasks. This will bring up the menu that will allow you to pull up the Metadata Template and/or the Band (see Getting Started Part 4 for explanations) and make sure you click on Apply once the template or the band has been corrected/selected. Then you can go through the Import process again.

Hopefully this won't happen to you. When it has happened in past, it's been on re-use of an existing project and only occasionally then. It's not a bad idea when re-using a project and getting ready to import more items, to just automatically do a quick check of the template and the band to make sure they have what you want them to have and that the Apply button has been clicked. This is especially useful if you're using the metadata template fields to pre-fill in fields that may be subject to change between groups of items (like perhaps a collection name, or a required citation, or date spans).

Now that your images are imported, your band is applied to your images, and your baseline metadata fields have been filled in, it's time to apply metadata to each item. That process is in the next tutorial: Adding metadata.