

## Iowa Heritage Digital Collection Getting Started with Content DM Projects

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*(with thanks to Samantha Schmehl Hines whose work on importing images forms the core of the present document)*

- 1) *Create a folder* on your local computer hard drive in which to store your records.
- 2) Open your ContentDM Acquisition Station and *create a project* [this is when you will need your password, give your project a name, & the address of your server—e.g. <http://lib.transition.iowa.uiowa.edu>.]
- 3) *Examine the established metadata template* and, if necessary, make modifications appropriate to your own projects. To do this you will work in the “collection administration” module of the program. See the Addendum below.
- 4) Decide about “*Banding*.” Putting your collection’s name along the bottom of the item is recommended especially for photographs. You’ll find this option in the Acquisition station under “Edit”/ “options”. Experiment with your first few images—many choose a “no-color” band with text in black Ariel. If you don’t like the looks of your first choice, delete the imported image, change your settings, and try again. We would recommend settling this issue before you do a batch (or large) import.
- 5) Decide which fields might contain *repeated content* (e.g. a legal statement in the “Restrictions” field might always contain the same copyright information for each record) and add this metadata to the fields by opening up the “template creator” in the Acquisition Station. (This will also be an option each time you select “Advanced” in the lower left of the “Batch add” dialogue window.) You can change this information for every single or group import if you wish—and you can delete or edit the metadata later even after you have added the record to the collection
- 6) *Importing Images* Theoretically, ContentDM will transform tiff images into jpegs but it works better if we do that ourselves since the file size slows the program down to the point where it often crashes. Not everyone will be working with Tiff images, of course; but the object of the following information is to make sure you come to your Acquisition station software with jpeg images. When you have good jpeg images, you can import them into your acquisition station, add metadata, and then export them (as completed records with thumbnail, display image and cataloging data) for uploading onto a server for public display. So, The following information is here for anyone who creates the recommended archival Tiff images. Groups beginning with jpegs, however, should still consider the information on jpeg size and resolution.

### ***To transform a tiff into a jpeg:***

- A. Open the tiff in an image-editing program such as *Adobe Photoshop Elements*, *MS Office Picture Manager* or *Graphics Converter*. Save the file (under File menu, select “Save As...””) as a jpeg (you may have to use the pull-down menu at the bottom of the Save window to select jpeg).

Next, the file needs to be resized. We want our images to be 1000 pixels wide at most, and to keep a proportionate length based on the original file dimensions. This is a good size for getting the detail of the letters, but still fits on a computer screen.

***Here's how to resize an image in such programs:***

- A. In Adobe Photoshop Elements, select Image, and then resize.
- B. Enter "1000" for width (make sure it's **in Pixels!** There should be a pull down menu to change from inches to pixels if necessary). The proportions should remain the same.
- C. Save the resized image. Make sure to save it at the **highest quality** (lowest compression). Again, there should be a pull down menu on the Save window.

I usually save a batch of images to a folder on my desktop or hard drive. Then, when I have a few built up I import them to ContentDM.

***To import a batch of files to ContentDM:***

- A. Open the Acquisition Station (Start, Programs, Acquisition Station).
- B. Select "Open" from the splash menu if you are working on an existing project
  1. The program will give you a list of projects (which you've already created) to choose from. Or, select "New" to start a new project and the New Project Wizard will launch.
    - a. For the Iowa Heritage Project, our server address is: <http://lib-transition.iowa.uiowa.edu>.
    - b. If you forget your password or project ID contact Holly Martin Huffman at the University of Iowa Libraries (holly-huffman@uiowa.edu).
- C. Select Acquire and then Batch Add.
- D. Select "Import files from a directory." Click next.
- E. Navigate to the folder in which you stored all your resized images. Click next.
- F. If you have metadata that will be the same for all items added (for example date/time record created, initials, subjects, authors, etc.) you could add this information by clicking on the "Advanced" button in the lower left corner of the window. [You may have already done this under step 5 above—but this is another chance to edit.]
- G. Click on "Finish" to import the images and any metadata.

***To import a single image to ContentDM:***

- A. Select Acquire.
- B. Select Import File.
- C. Browse to the file you wish to import, then click on "Open."

### 7) *Adding Metadata*

Once an image is imported into ContentDM, merely double click on it to open up the metadata template. You can also just click once on the field you wish to edit while in the table view (the default “look” of a ContentDM project) and type away. I try to maintain Library of Congress and AACR2 standards when entering data by making sure fields that map to MARC fields conform to the rules governing that field, subject headings are valid Library of Congress Subject Headings, and so on. The metadata template needs to be set up in accordance with the data dictionary for our project (see below). If you need to alter the metadata template, see the first Addendum (at the end)

### 8) *Uploading Records to the Server*

Now that we have all these nifty images with attached metadata, let’s get them up on the assigned server and ready for a final review before they are viewable by the public. Currently, we upload these by dumping the files into a folder on the local machine (or external hard drive which is attached to the local machine); and then either burning them to a CD which we mail to our assigned server (Drake, University of Iowa or St. Ambrose); *or* by sending them via FTP to our assigned server’s “public drop box.” For security reasons, we are not using the program’s direct FTP upload for external collections. If ContentDM ever allows for “Secure FTP” that may change.

#### **To dump our records into a local folder:**

- A. Click *upload button* when you’ve completed your records (or highlight selected records for upload). Click OK.
- B. A progress bar should come up, showing you the status of the upload, and then you will get a report on how many records were uploaded.

At this point, you can copy that folder to CD (or portable hard drive) and send it to Holly Martin Huffman at the University of Iowa Libraries. Some projects may have the option to upload the folder via FTP to an electronic drop box at the University.

**Adding Uploaded Items to the Web Collection** Once the University has uploaded the items to the server, they will send us an email. At that point, we need to go back into ContentDM, open up the project that the records came from, and add them to the collection.

**To add items from the U of I Server to our web collection:** (*Note that our records are not yet displayed for public viewing.*)

- A. Open ContentDM.
- B. Select Open.
- C. Select the project name.

- D. Go to Administration, then Collection Administration.
- E. Click on “Add New Items.” You should get a status report, then an indication that the process is complete. Before adding, however, you may review each item (some or all) and you may make changes.
- F. Click on the Home button in Collection Administration.
- G. Click on “Build Text Index.” This will give you a running status report. Scroll all the way to the end and wait for the words "Build of text index was successful" to appear. Once you have done this the records will be viewed by the public on the IHDC website. (*Note—you may still make changes to an individual or group of records by selecting the edit option in this same Collection Administration menu. See below for further instructions.*)
- H. Click on the Home button again.
- I. Click on “Browse or Search the Collection (View Only)” and make sure everything looks the way it should.

### **Editing the Web Collection (select the *collection administration* module)**

*If you notice any problems in the View Only display, or need to change or delete any items after uploading, follow these steps:*

- A. Click on “Update/Delete Existing Items.”
- B. You will need to run a search to find the item that needs to be changed. If you need to fix quite a few records, there is an option to change the number of records displayed toward the bottom of this screen. Also, you can run a Global Edit (see below).
- C. Click on the title of the item in the result list.
- D. Make changes in the metadata form (any field can be altered) and mark at the end of the form the date and your initials.
- E. Click the “Make Changes” button.
- F. You can also delete items from this screen (but please consider carefully before you do!). Just click on “Delete this item” at the bottom of the metadata form.
- G. Use the back button in the upper left corner to go back to the results list if you have more records to change.
- H. You will need to run the “Build Text Index” on the Home page once all your changes are complete.

### **To make a Global Edit to change all the records in the collection (select the *collection administration* module):**

- A. Click on “Global Search and Replace” in the Home menu.
- B. The following changes can be made:
  - 1. Find and replace terms in a specific field
  - 2. Find and replace terms in all fields
  - 3. Change the text in a particular field to a specific term or phrase
- C. These changes are FINAL so be very careful. However, changes can be made to records at any time—the records are never fixed for eternity—so

theoretically a find and replace could be rerun to change terms back if necessary. Use good judgment with this tool!

- D. You will need to run the “Build Text Index” on the Home page once all your changes are complete.

### **Creating Compound Objects (select the *collection administration* module)**

This is how to make all pages of a document appear under one cohesive title.

- A. Open ContentDM.
- B. Select Open.
- C. Select the project name.
- D. Go to Administration, then Collection Administration.
- E. Click on “Start the Compound Object Creator.” It will take a few seconds to open.
- F. Select New.
- G. Select a template type—for the Pospishil letters, e.g., it would be Document.
- H. Select a collection—e.g. “Czech.”
- I. Select Search (a pop-up search window will appear) to begin adding pages to the document. For the letters this is most easily done by typing in a date in the title field, and hitting the Enter key.
- J. To add pages, right click on the image that appears. Pages **MUST** be added to the document in the order they are to appear (add page one of the document, then page two, then page three, etc.)
- K. When you have selected all the pages of the document, close the search window.
- L. To enter the metadata for the document as a whole, click on the Document Description tab.
- M. To test out your document, click on preview. You will get to see what it will look like when uploaded. **Note that changes made to individual pages’ metadata after uploading may not take (especially with regard to page title), but that the document data itself is always editable.** Make sure the info is as correct as possible.
- N. When the document is as perfect as can be, click upload.
- O. Close the Compound Object Creator.

## **Addendum**

### ***Altering the Metadata Template***

**If you want to add, change or delete a field in the established template:**

- A. In the Administration menu, select Collection Administration.
- B. Click on “View/edit collection field properties.” You will see a list of all fields defined in your template along with their properties (searchable, hidden, etc).
- C. To change the properties for an established field, click on its name.

- D. To create a new field, scroll to the bottom of the list of established fields and click on “Add new field.”
  - 1. It’s a good idea to only add fields when called for by the metadata dictionary for our project (which can be found at <http://lib-transition.iowa.uiowa.edu/site-templates/digitization.html>) and to maintain the established properties for these fields.
- E. To delete a field, click on its name, scroll down to the end of the window, and select “Delete Field.”
  - 1. Fields called for by the metadata dictionary should generally be present even if they aren’t used during the course of the project (for example, Publisher is not used in the Pospisil letters project). These fields may have uses in future projects, and are in the metadata dictionary for that reason.
- P. Return to the Collection Administration menu (find the window with the wrench logo and click on the home button, or go to Administration, then Collection Administration in Content DM).
- Q. Click on Add New Items.
- R. Return to the Menu, and Click on Build Text Index.