

Exercise 4: Create Templates and Import Multiple Files

Before You Begin

To access the Project Client, you will need your CONTENTdm:

- User Name and Password
- URL for the CONTENTdm Server (<https://server17214.contentdm.oclc.org>)

What you will learn

In this exercise you will learn how to add groups of items at one time to a Project. You will explore more of the methods for adding metadata to items in your Project. You will use a template to automatically capture metadata at the point of importing, and you will learn to use other techniques to edit the metadata for the items in your Project.

The Exercise

If not already open, open your “Photographs” project.

Metadata Templates

Metadata templates enable you to automatically establish consistent metadata for items that you import into a specific Project. You can create multiple templates, based on different types of items you import into your Project Client. Once you have created a metadata template and selected it for use, all items you import *into that Project* will have this metadata until you change or delete the template.

Note: This enables you to automatically treat sets of a project’s items in a consistent fashion and add information automatically. You may choose to have multiple templates for a single Project. These templates can be changed at any time.

In this exercise you will create a general Project Template that captures the source file name, the publisher of the item, and media type information.

To populate your metadata template, follow the steps below.

- 1) From the **Other Tasks** options in the **task bar** menu, click **Edit Metadata Template**. You can also find the templates located in the Project Settings Manger from the Project's Home tab or from the Project menu or task bar.

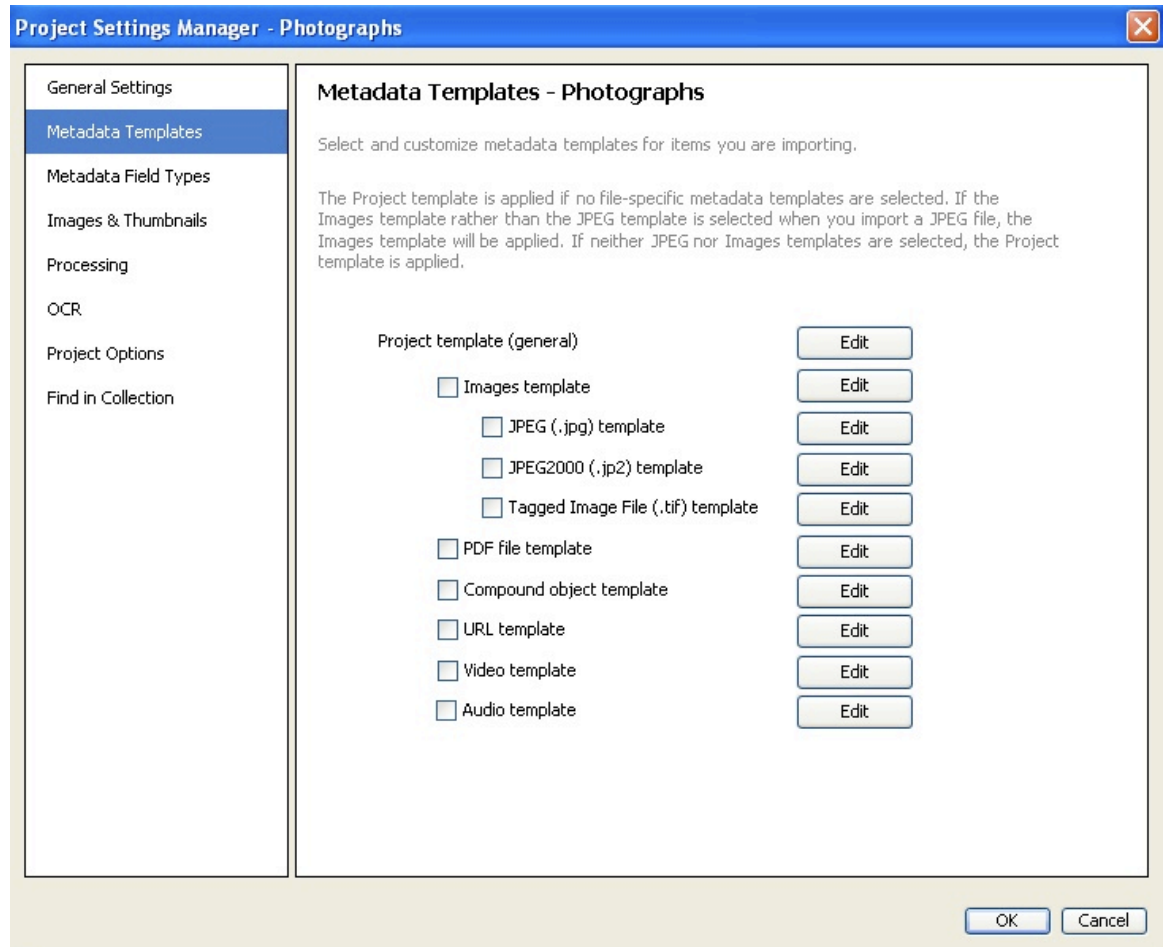
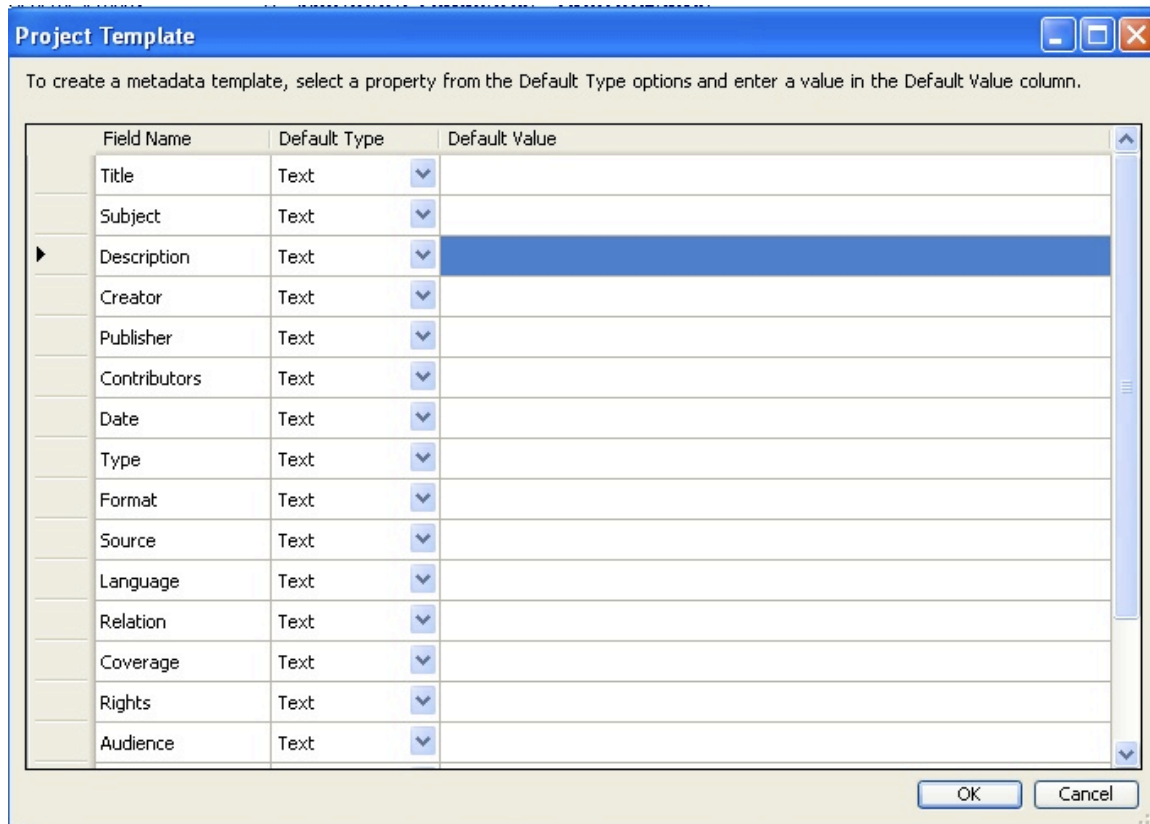


Figure 1: Metadata Templates

- 2) **Edit the Project template (general)**. The General template will apply metadata to ALL items imported into the Project.



- **Figure 2: Editing the template**

- 3) Locate the **Publisher** field. Click once in the **Default Value** column and type your name.
- 4) Locate the **Format** field. Select **File Extension** from the **Default Type**.
- 5) Locate the **Collection** field. Enter your CONTENTdm **Collection name** in the **Default Value**.
- 6) Locate the **Identifier** field. Use the drop-down list in the **Default Type** column and select **File name**; this will ensure that the name of the source object file is stored in the record's metadata.

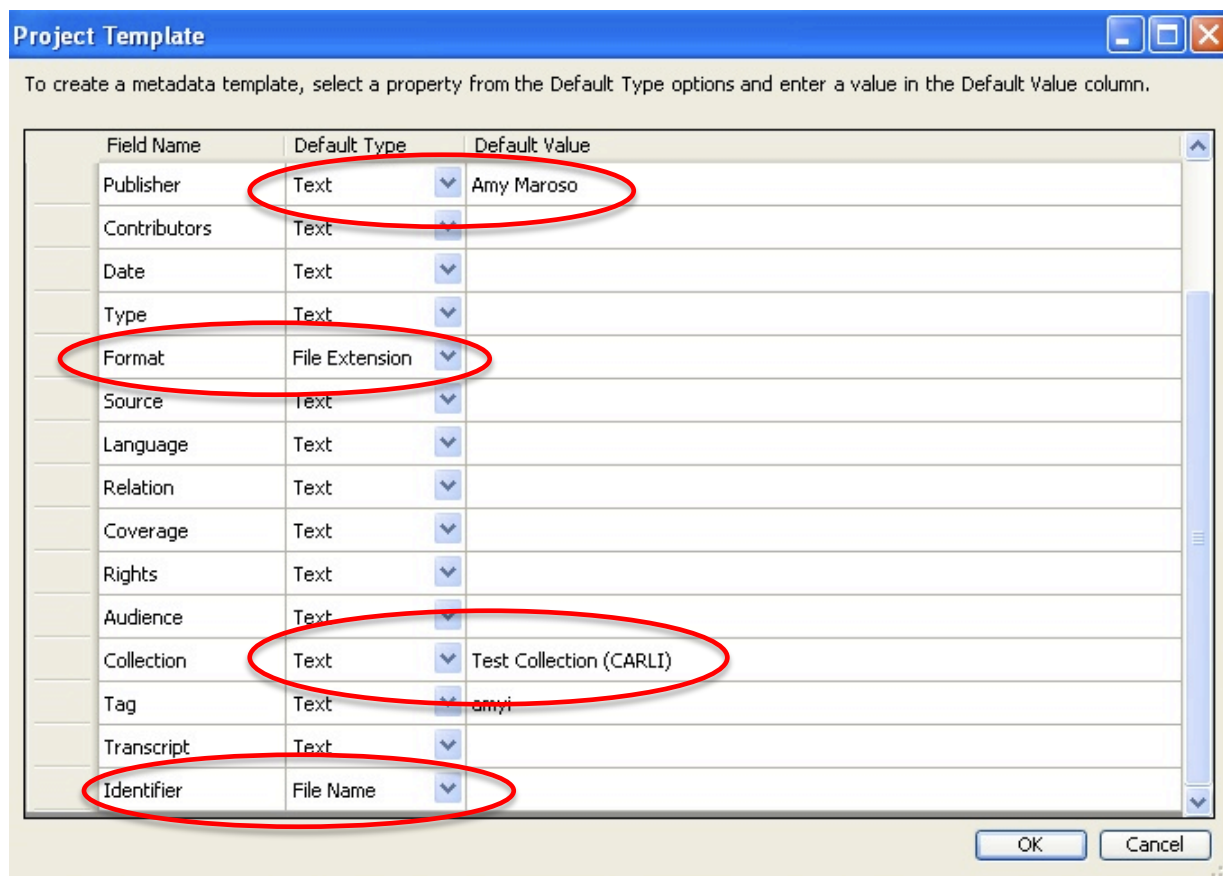


Figure 3: Setting up the template to automatically enter data

7) Click **OK**. This closes the **Template editor**. Now when you import images into this Project, the **Publisher**, the **File name**, **File Extension**, and **Collection name** information will be added automatically.

Importing multiple files

You *could* now use the template you have created to continue to add files one at a time. But to optimize your time, you may also use the template to populate metadata fields when importing multiple files at once.

1) Click on **Add Multiple files** from the **Common Tasks** in the task bar or from the **Add** drop-down menu to add multiple files at one time.

Add Multiple Items

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.

< Back Next > Cancel

Figure 4: Importing multiple files all at once

2) Choose the **Import from a directory** method (default) and then **Browse** to Exercise Data folder on your desktop. **Select the Five Nature Images** folder to import all those images into the Project Client.

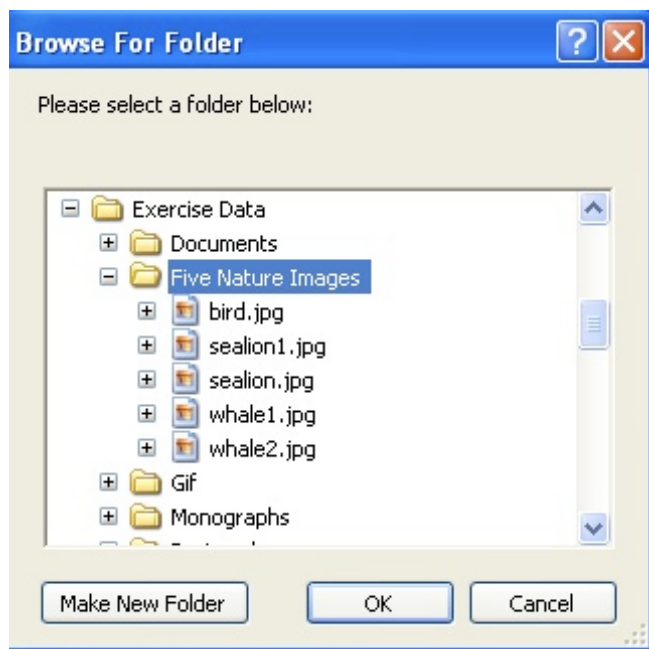


Figure 5: Browsing to the location of your prepared items

3) Make sure the Five Nature Images folder is selected and highlighted.

4) Click OK, then Next, and allow CONTENTdm to create display images, click Next. You will then have a summary window of your actions.

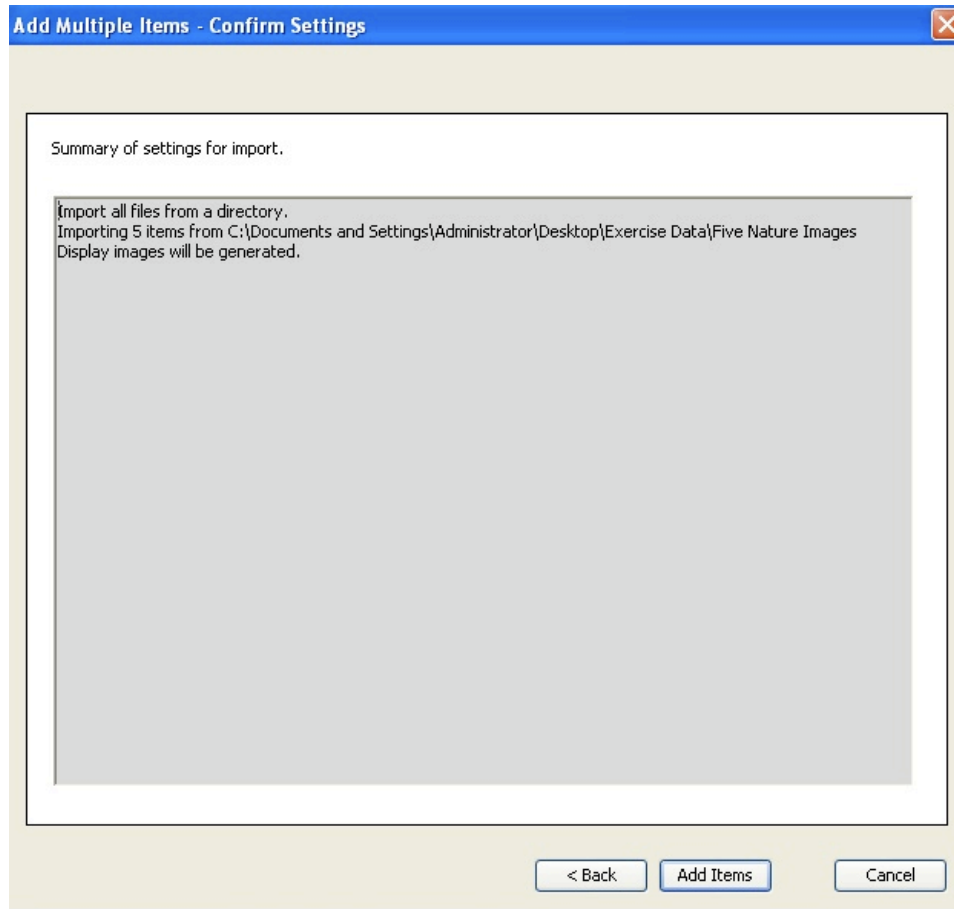


Figure 6: Summary of what you plan to import into the spreadsheet.

5) When you click **Add Items**, the Project Client retrieves **every file from the specified folder**, adding them to the items already in your Project. During import, it adds the metadata to each new item according to the General Template you just created.

6) Close the summary window. Your items are now included in the spreadsheet on the Project's tab screen.

Add Metadata to the Spreadsheet with Fill Options

You can also easily add, edit, delete, and replicate existing metadata in the project spreadsheet by means other than the Metadata Templates. Follow the steps below, using alternative means to add and replicate existing data.

- 1) Click in the **Date** column of the first record and **enter today's date**. **Click enter**, then **Right-click** in the cell you've just put the date into. This launches the Fill function, shown below. **FILL ALL** of the Date fields using this function.

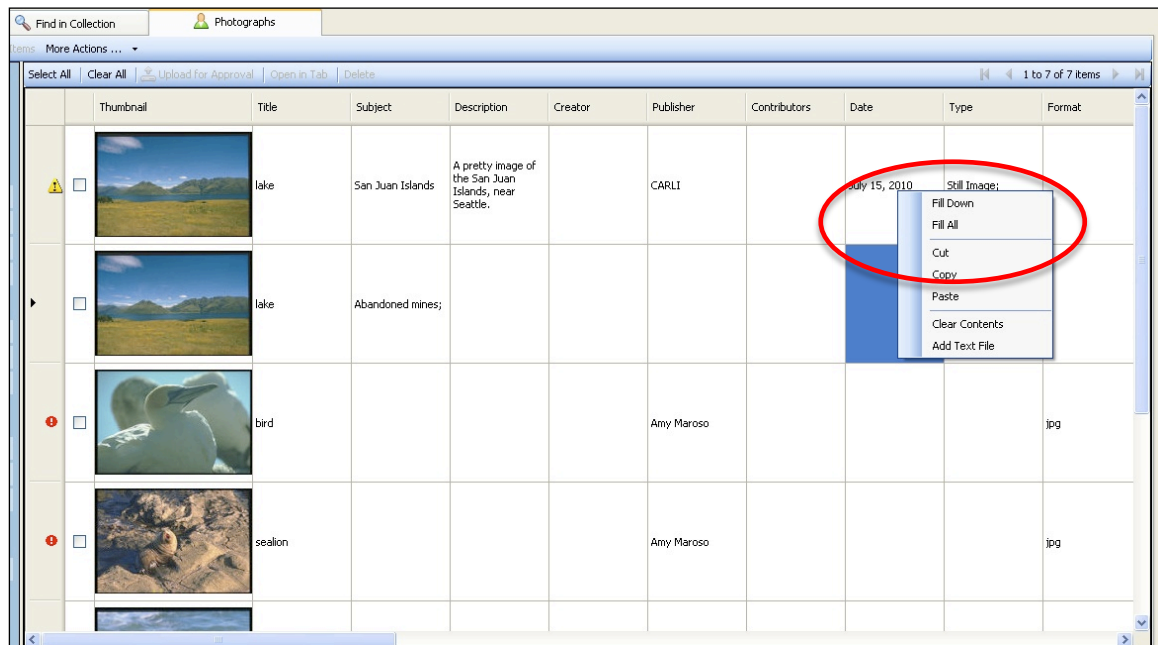


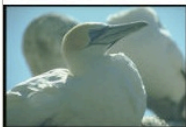




Figure 7: Using the Fill functions to replicate data

- 2) Use the fill option to **add Rights and Type information** to each item in your collection. Since you already have an item with data in these fields, you can use the already-filled cells and one of the fill options.

Select All Clear All Upload for Approval Open in Tab Delete										
	Thumbnail	Title	Subject	Description	Creator	Publisher	Contributors	Date	Type	Format
<input type="checkbox"/>		lake	San Juan Islands	A pretty image of the San Juan Islands, near Seattle.		CARLI		July 15, 2010	Still Image;	
<input type="checkbox"/>		lake	Abandoned mines;					July 15, 2010	Still Image;	
<input type="checkbox"/>		bird				Amy Maroso		July 15, 2010	Still Image;	jpg
<input type="checkbox"/>		sealion				Amy Maroso		July 15, 2010	Still Image;	jpg
<input type="checkbox"/>										

- **Figure 8: Multiple individual files ready for upload.**

Note: The spreadsheet view now contains your items and the metadata and is ready for uploading. You may leave your Project Client session open since Exercise 5 begins where you have left off. However, your work is automatically saved in the Project, whether you close your session or not.