

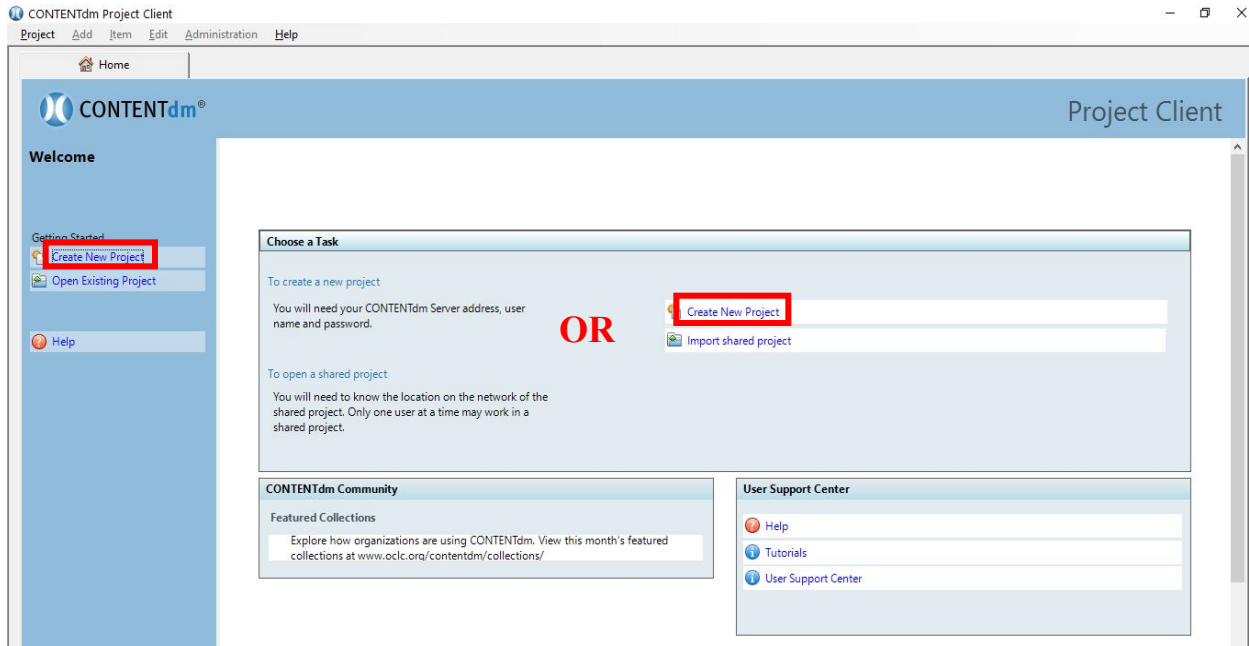
## Creating a Metadata Template (created by Andrea Payant – May 2017)

Setting up a metadata template is essential for gathering technical metadata embedded within files that are uploaded into CONTENTdm. They also allow you to customize field content before items are uploaded which can save a lot of time.

\*Note: When batch uploading metadata (and accompanying files) using a Tab Delimited file, only set metadata template values for content not already reflected in the metadata from your spreadsheet to avoid duplication

### In CONTENTdm Project Client

#### 1. Select “Create New project”



#### 2. Enter your login information – make sure the Server URL is correct (see below)

Enter URL and logon credentials

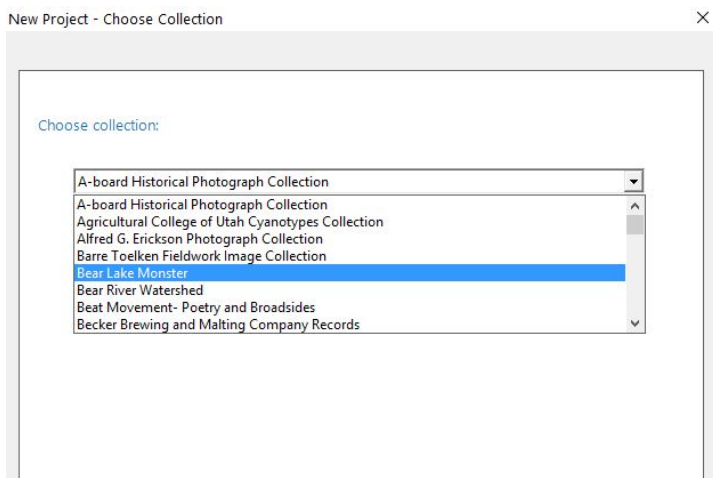
CONTENTdm Server URL:

User name:

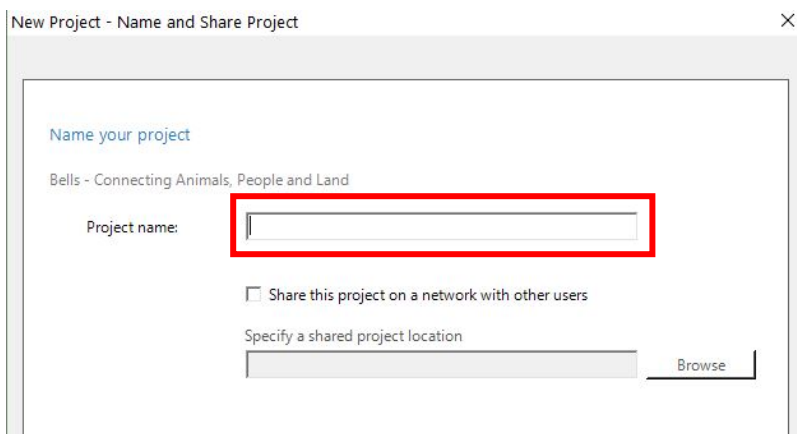
Password:

##### 2.1. Click “Next”

#### 3. Select the collection from the drop down menu

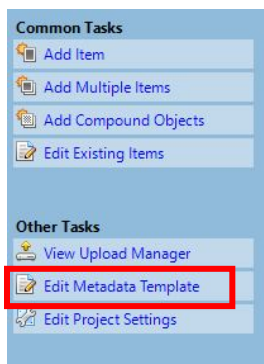


4. Name your project – the name can be anything you want



4.1. Click "Finish"

5. Select "Edit Metadata Template"



6. Check all templates that apply to items in your collection (selections are based on item type)

Project template (general)

<input type="checkbox"/> Images template	Edit
<input checked="" type="checkbox"/> JPEG (.jpg) template	Edit
<input type="checkbox"/> JPEG2000 (.jp2) template	Edit
<input type="checkbox"/> Tagged Image File (.tif) template	Edit
<input checked="" type="checkbox"/> PDF file template	Edit
<input type="checkbox"/> Compound object template	Edit
<input type="checkbox"/> URL template	Edit
<input type="checkbox"/> Video template	Edit
<input type="checkbox"/> Audio template	Edit

6.1. Click to “Edit” a template (repeat for each item type as needed)

6.2. Enter default values for specific fields or “map” the field information to a default type using drop down menus. Use “canned text” for field values when appropriate.

JPEG Template

To create a metadata template, select a property from the Default Type options and enter a value in the Default Value column.

Field Name	Default Type	Default Sub-type	Default Value
Where was this taken?	Text		
Creator	Text		
Contributors	Text		Compton, Matthew Glenn--1923-1999; Compton, Matthew Joseph--1892-1967
Publisher	Text		Compton's Studio
Original Material Type	Text		black-and-white negatives
Time Period	Text		
Language	Text		eng
Source	Text		Utah State University, Merrill-Cazier Library, Special Collections & Archives, Compton Photograph Studio ...
Rights	Text		
Order information	Text		
Physical Collection Information	Text		Compton Photograph Studio Archive Collection P0313
Collection Inventory	Text		http://archiveswest.orbiscascade.org/ark:/80444/xv71670
Digital Collection	Text		Compton Studio Photograph Collection
Date Digital	Date		
Conversion Specifications	Text		
Type	Text		
Format	Format		
Transcript	Text		
Topic	Text		
Identifier	File Name		
Search Date	Date		
Image Height	Height		

OK Cancel

Mapping examples:

**Images-JPEG**

- File Size >> mapped to >> File Size
- Checksum >> mapped to >> Checksum
- Color Space >> mapped to >> Colorspace
- Image Height >> mapped to >> Height
- Image Width >> mapped to >> Width
- Resolution >> mapped to >> Resolution

## **PDF**

File Size >> mapped to >> File Size  
Checksum >> mapped to >> Checksum

## **Audio**

File Size >> mapped to >> File Size  
Checksum >> mapped to >> Checksum

- 6.3. OPTIONAL – Select an empty field with no default value and enter “pending” (this will help you find items that have incomplete metadata in your collection when adding to your project – particularly useful for very large collections)
- 6.4. Click “OK” when finished
7. Field values selected from default types (mapping) and default values entered in the template will be applied to all items upon uploading into CONTENTdm