

Uploading Items and Metadata into CONTENTdm Project Client Using a Tab-Delimited File

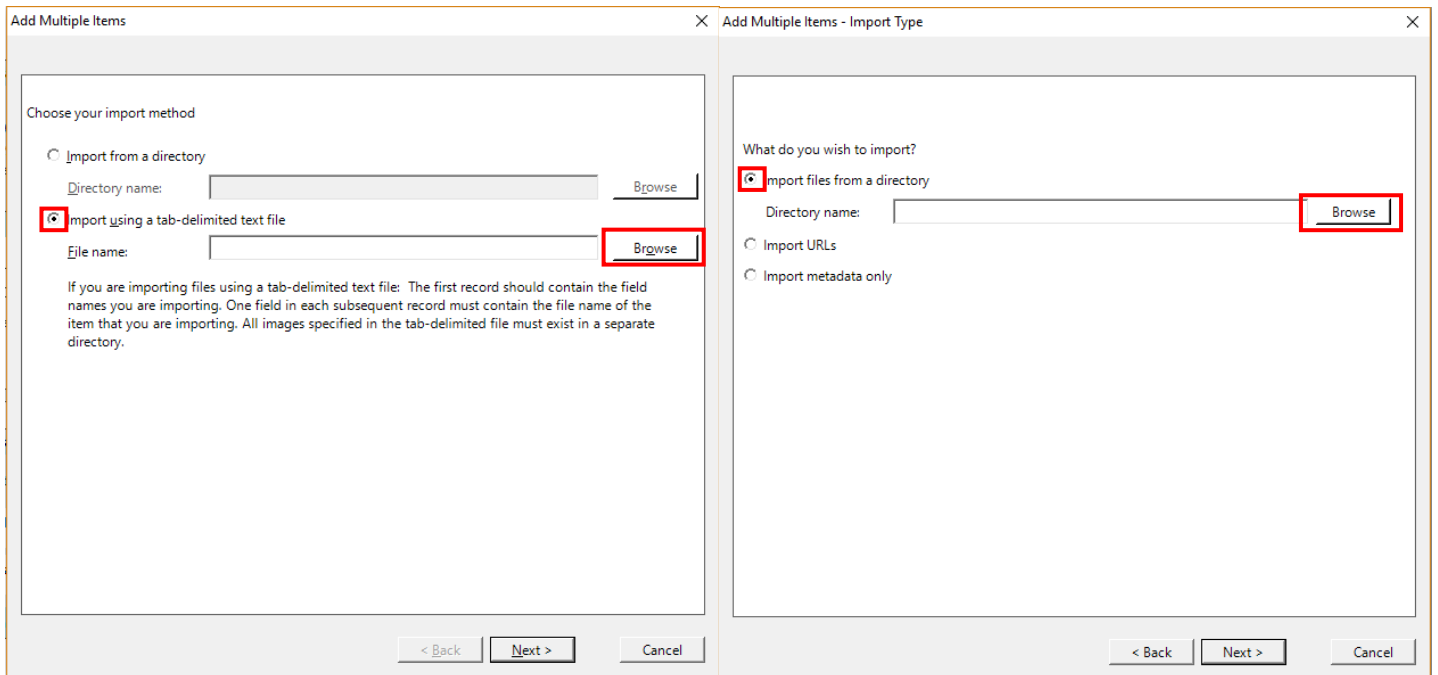
(Modified by Andrea Payant – January 2018)

1. Create metadata for each item in the collection using Microsoft Excel (use the default metadata template if applicable)
 - * Spreadsheet columns must correspond exactly with the fields set up for the collection in CONTENTdm or vice versa
 - a. Match the filename with the corresponding item in the spreadsheet and record the filename in the "Filename" column. Be sure to include the file extension (.jpg, .tif, .pdf, etc.)
 - * The filename column must be the last column in the spreadsheet
 - * If filenames do not match up, it will cause the items to be skipped in the CONTENTdm batch upload or may cause errors.
2. Save the spreadsheet as a UTF-8 encoded tab delimited file by using the "save as" function and selecting "tab delimited text (.txt)" in the "Save as Type" dropdown menu
 - * For PC users, ensure that the file is saved with UTF-8 encoding by selecting "Web options" in the Tools dropdown at the bottom of the dialog box. Select "Encoding," then in the "Save this document as:" dropdown, select "Unicode (UTF-8)"
3. Using Notepad, open the tab-delimited file. You should see a lot of text that looks like a long paragraph.
4. Go to the very end of the text and delete any empty space (i.e. the last tab) that exists after the text.
5. Resave the file
6. Set up a CONTENTdm collection and metadata template (if not completed already) in Project Client
 - * Note: a template must be created for each file type in the collection to gather technical metadata upon upload
 - a. Create a collection in CONTENTdm – see the “Creating a Digital Collection” quick guide for general collection set up
 - * For more detailed instructions on setting up a CONTENTdm collection, see the OCLC documentation at: http://www.oclc.org/support/services/contentdm/help/project-client-help/working-with-projects/creating-a-project.en.html#par_text_6135
 - b. Set up a CONTENTdm metadata template – see the “Creating a Metadata Template” quick guide
 - * For detailed instructions on setting up a metadata template in CONTENTdm, see the OCLC documentation at: <http://www.oclc.org/support/services/contentdm/help/project-client-help/working-with-projects/about-project-settings/metadata-templates.en.html>
7. Add multiple files (with accompanying metadata) using a tab-delimited text file
 - Make sure your metadata spreadsheet contains column headers that exactly match the wording and order of the collection in CONTENTdm

- Set up your files so that the tab-delimited text file is separate from the files that you are adding

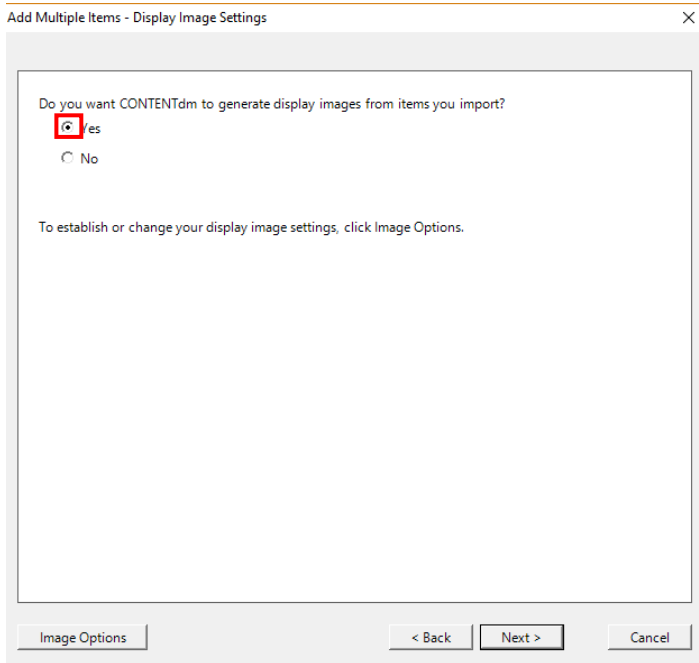
Name	Date modified	Type
SCAMSS0263Bx001	1/5/2018 1:06 PM	File folder
SCAMSS0263Bx001	1/29/2018 8:52 AM	Text Document

- Navigate to the Home tab or Project tab
 - a. On the left task pane under Common Tasks, click “Add Multiple Items” >> Add Multiple Items wizard opens
 - b. On the Import Method screen, select “Import using a tab-delimited text file” and browse for the file
 - c. Click “Open” and then click **Next**.

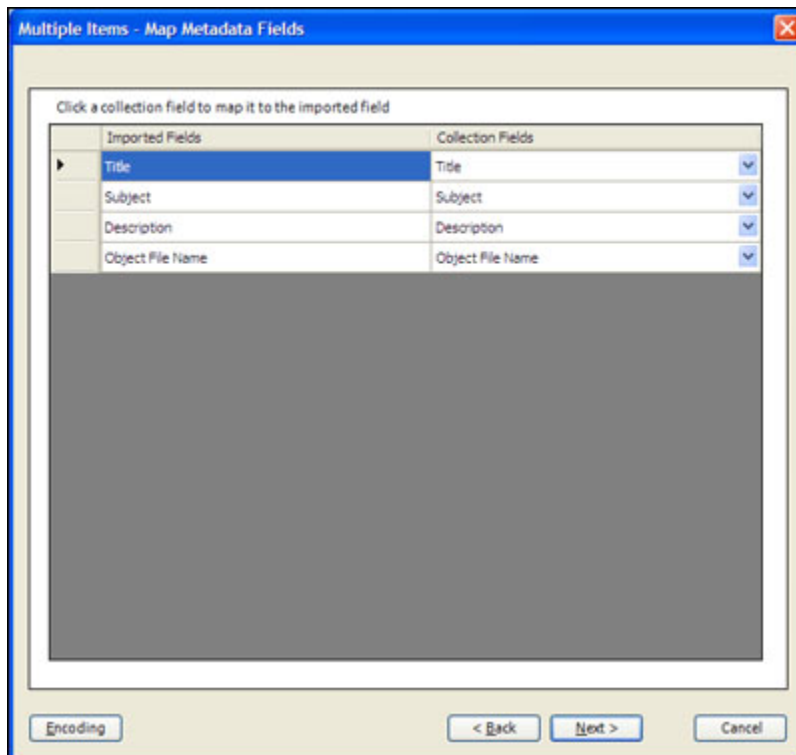


- d. On the Import Type screen select “Import files from a directory” and browse for the file
- e. Click “Open and then click “Next”

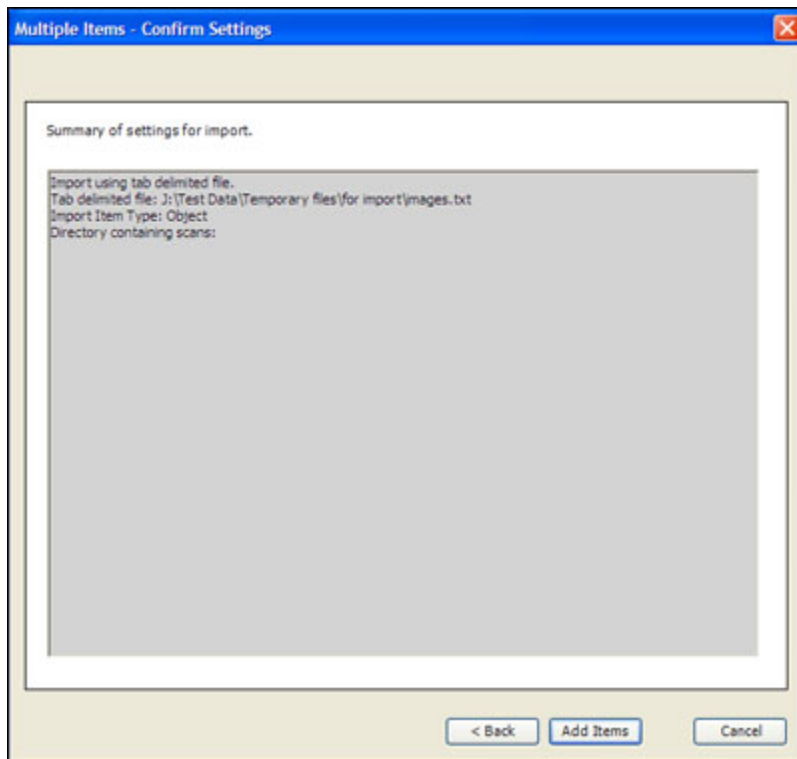
- f. On the Display Image Settings screen select “Yes” under the option “Do you want CONTENTdm to generate display images from items you import?”



- g. Click “Next” >> The Map Metadata screen displays
- h. Map the fields in your CONTENTdm collection to the imported field names. The imported field names from your tab-delimited text file appear in the left column. See [About Mapping Fields](#) for more information on mapping fields.

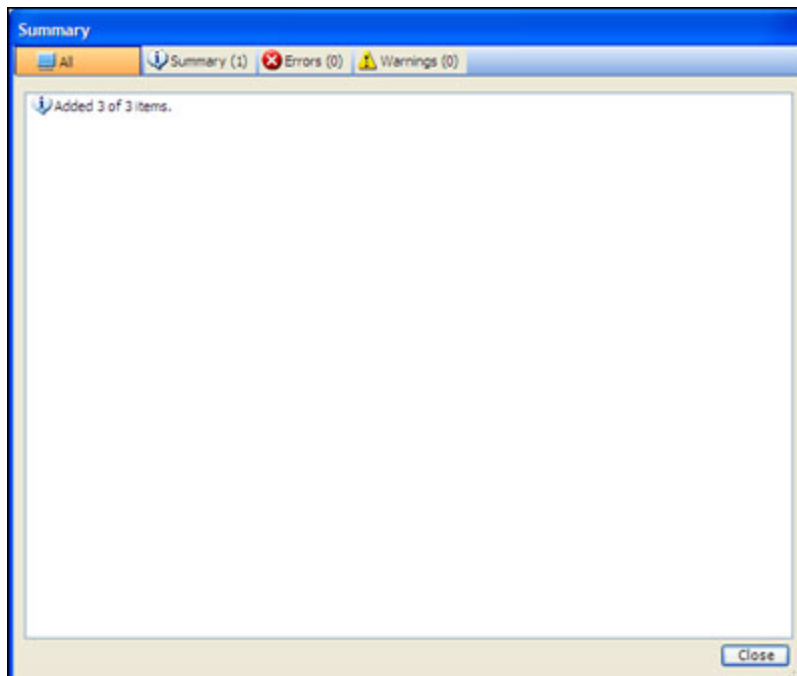


1. Click **Next**. The Confirm Settings screen displays.



Review the settings and then click **Add Items**.

A progress screen displays as the items are processed. When complete, a summary screen displays the summary and any errors or warnings.



2. Click **Close**. The items are displayed in the project spreadsheet.

Note: The original files remain in the current location. Copies are added to the project spreadsheet.

See: <http://www.oclc.org/support/services/contentdm/help/project-client-help.en.html> for any additional help