Approving and Indexing Collections (created by Andrea Payant – May 2017)

1. Open your collection in CONTENTdm Project Client

2. Browse the collection OR enter “pending” into the search box (to find items with pending metadata – if applicable)

3. Select individual items you want to add to your project OR click “Select All” if you want to add all listed items to your project
4. Click “Add to Project (edit)”

5. Complete the necessary metadata for the items

6. Select individual items that are ready for approval and indexing OR click “Select All” if all items in your project are ready for approval and indexing
7. Select “Upload for Approval” >> wait for items to be uploaded

8. Go to CONTENTdm Administration

8.1. Login
9. Go to the “Items” tab

Item administration

Approve
Approve, edit or delete items in the pending queue.

Index
Index the collection after adding, approving, editing and deleting items.

Add
Add an item to the pending queue. Items are reviewed and approved before becoming part of the collection.

Edit
Edit and delete items in a collection.

Find & replace
Find and replace metadata within one field, all fields, or change fields for all items.

Lock administration
Unlock items in a collection.

View collection
View current collection in the website display.

OR

10. Select “Approve”
11. You will see the amount of pending items pending approval >> you can review the list and select individual items or all items, then click “Approve” OR If all items are ready for approval you can select “Go”

**Approve items**

Approve all items in the pending queue or review the detailed approval queue actions to approve items individually or to add terms to the controlled vocabulary.

To schedule an approval process, click *add*.

<table>
<thead>
<tr>
<th>Full approval queue actions</th>
<th>view approval history</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Now:</strong> 1 pending item(s), 0 controlled vocabulary terms</td>
<td></td>
</tr>
<tr>
<td><img src="Image" alt="Select options" /></td>
<td><img src="Image" alt="Add button" /></td>
</tr>
</tbody>
</table>

- **Approve all**
  - (Records with unauthorized terms are approved but terms are not added to the controlled vocabulary.)

- **Approve & index all**
  - Warning: This cannot be undone.

<table>
<thead>
<tr>
<th>Scheduled approvals — pending</th>
<th><img src="Image" alt="Add button" /></th>
</tr>
</thead>
<tbody>
<tr>
<td>No approvals scheduled</td>
<td></td>
</tr>
</tbody>
</table>

**Detailed approval queue actions**

**Controlled vocabulary**

All terms in pending items conform to the defined controlled vocabulary.

<table>
<thead>
<tr>
<th>Reviewing 1 of 1 pending item(s)</th>
<th>approve</th>
<th>delete</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="Image">Select options</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td><img src="Image" alt="Select options" /></td>
<td><img src="Image" alt="Edit option" /></td>
<td></td>
</tr>
<tr>
<td>SCAND0313-1945:3139</td>
<td><a href="Image">Edit</a></td>
<td><a href="Image">Delete</a></td>
</tr>
</tbody>
</table>

- **Select:** all 1 | none

12. Go to the “Index” option under the “Items” tab

**OR**

**Item administration**

Approve

Approve, edit or delete items in the pending queue.

**Index**

Unlocks the collection after adding, approving, editing and deleting items.

Add

Add an item to the pending queue. Items are reviewed and approved before becoming part of the collection.

Edit

Edit and delete items in a collection.

Find & replace

Find and replace metadata within one field, all fields, or change fields for all items.

Lock administration

Unlock items in a collection.

View collection

View current collection in the website display.

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13. Select “index now” >> wait for items to index
14. Go to the “view collection” option under the “Items” tab

15. Take a look at the items in the collection to make sure everything looks correct