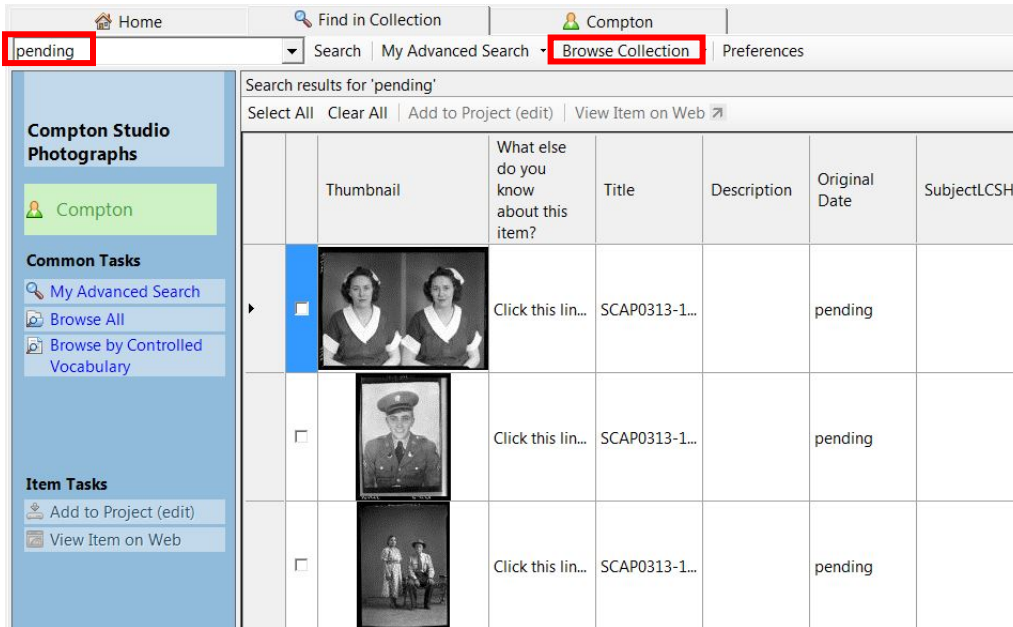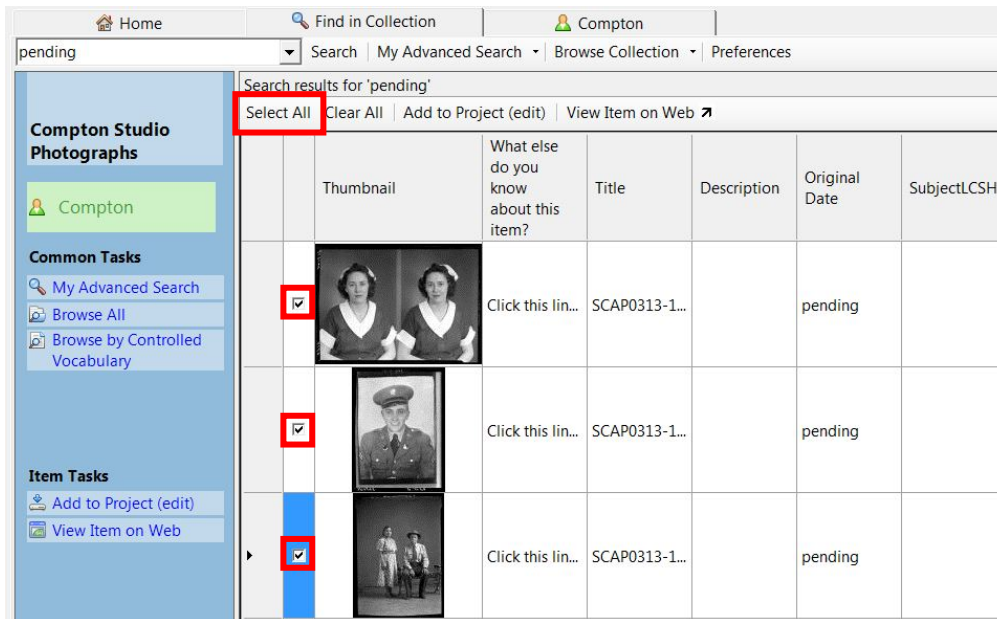# Approving and Indexing Collections (created by Andrea Payant – May 2017)
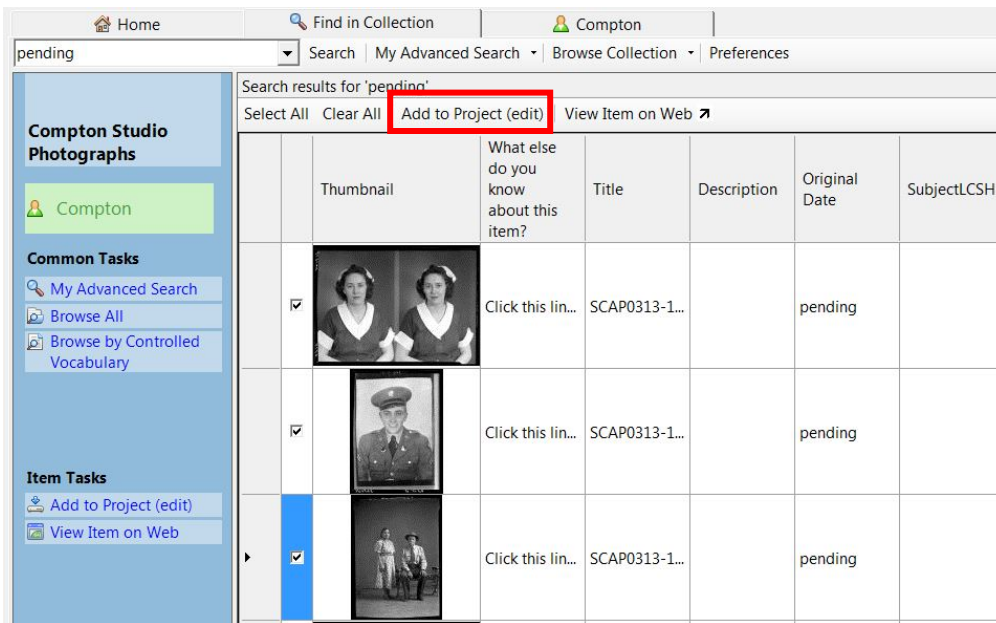
1. Open your collection in CONTENTdm Project Client

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
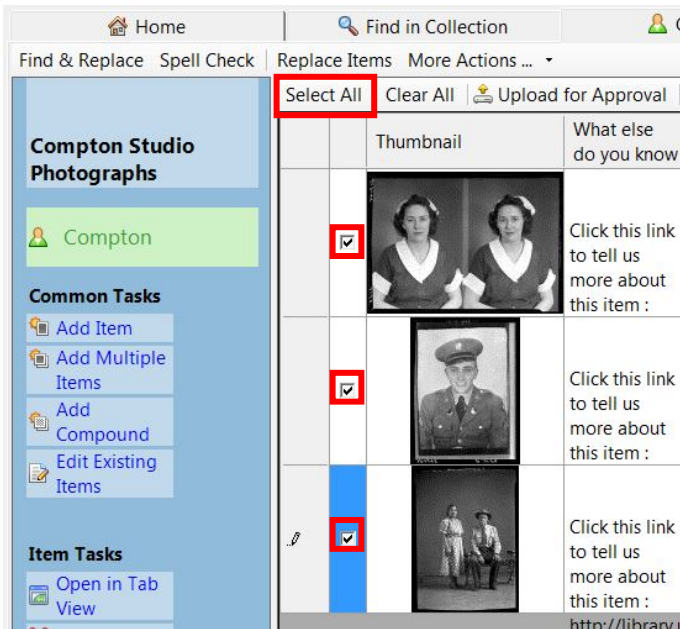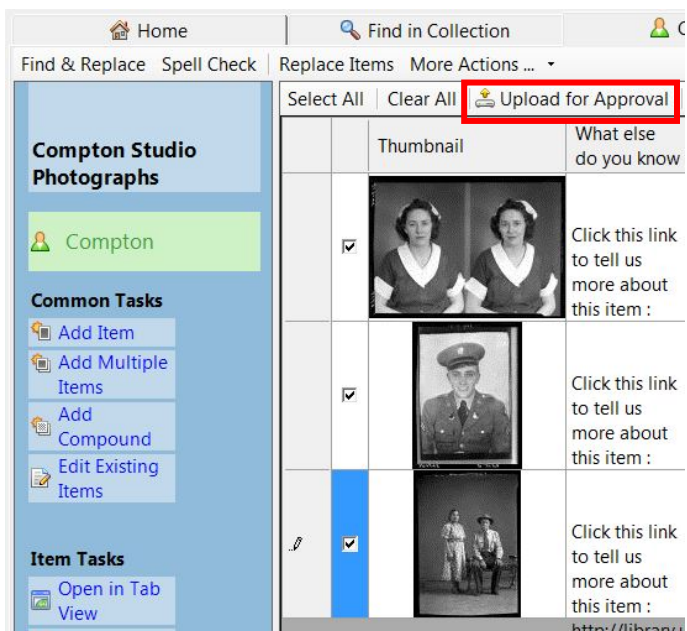
4. Click "Add to Project (edit)"

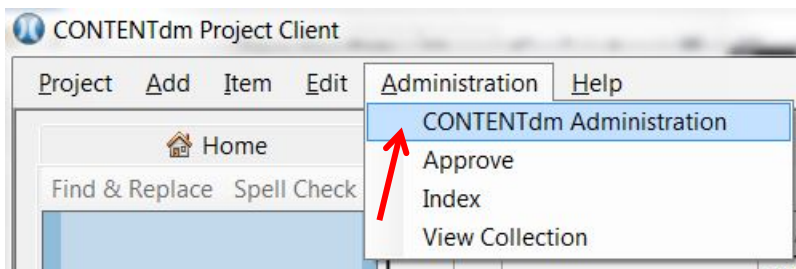5. Complete the necessary metadata for the items

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

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**.

Full approval queue actions	view approval history

Now: 1 pending item(s), 0 controlled vocabulary terms

- ⦿ Approve all
- ◯ Approve & index all

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

- ◯ Delete all
  Warning: This cannot be undone.

Scheduled approvals — pending   add

No approvals scheduled

go

Detailed approval queue actions

Controlled vocabulary

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

Reviewing 1 of 1 pending item(s)

approve   delete

select: all 1 | none

☐ SCAP0313-1945-3139   edit

select: all 1 | none

approve   delete

12. Go to the "Index" option under the "Items" tab

CONTENTdm Administration

admin home ———————— server | collections | items
:: approve : index : add : edit : find & replace : lock administration : view collection : help ::

Current collection: Compton Studio Photographs [▼] change

OR   **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.

13. Select "index now" >> wait for items to index

CONTENTdm Administration

admin home   server   collections   items

:: approve : index : add : edit : find & replace : lock administration : view collection : help ::

Current collection: Compton Studio Photographs   change

Index

Index the collection after you have added or deleted items, or changed metadata within a collection. Indexing may take several minutes.

Note: All times shown are in EDT.

Index status

> **Last index successful**
> Started: 2017-04-25, 16:02:11

Scheduled indexes — pending

> **No indexes scheduled**

Index history   see all

- 2017-04-25, 16:02:11: Duration: 00:04:40
  Items in index: 13204
- 2017-04-25, 15:41:37: Duration: 00:02:11
  Items in index: 13204
- 2017-04-25, 15:33:16: Duration: 00:02:46
  Items in index: 13204
- 2016-11-03, 14:32:49: Duration: 00:03:04
  Items in index: 13204

Index scheduler

Immediate indexing

Start the index process now to update your collection without scheduling.

   index now

Scheduled indexing

Schedule one-time or recurring index processes to index the collection automatically at a planned time.

- ● Once on   2017-05-22   at   16:00 ▼
- ○ Recurring at   1:00 ▼
  - ○ Daily
  - ○ On the selected days:
    - ☐ Monday   ☐ Saturday
    - ☐ Tuesday   ☐ Sunday
    - ☐ Wednesday
    - ☐ Thursday
    - ☐ Friday

   schedule index

CONTENTdm Administration

admin home   server   collections   items

:: approve : index : add : edit : find & replace : lock administration : view collection : help ::

Current collection: Compton Studio Photographs   change

Index

Index the collection after you have added or deleted items, or changed metadata within a collection. Indexing may take several minutes.

Note: All times shown are in EDT.

Index status

> **Indexing...**
> You cannot start another index until completion
> Started: 2017-05-22 at 15:13

Scheduled indexes — pending

- Index once: 2017-05-22 at 15:13   cancel

Index history   see all

- 2017-04-25, 16:02:11: Duration: 00:04:40
  Items in index: 13204
- 2017-04-25, 15:41:37: Duration: 00:02:11
  Items in index: 13204
- 2017-04-25, 15:33:16: Duration: 00:02:46
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    - ☐ Monday   ☐ Saturday
    - ☐ Tuesday   ☐ Sunday
    - ☐ Wednesday
    - ☐ Thursday
    - ☐ Friday

   schedule 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