Flatbed Scanning and You
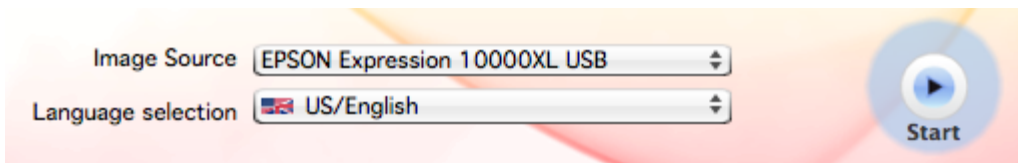
Scanner Set-up

1. **Turn on the scanner** and wait a few seconds for it to stop making noises and for the green "Ready" light to stop flashing.

2. Launch the Silverfast 8 app:

3. Make sure the right scanner is selected in the *Image Source* space.

4. Click the Start button

If you handle photographs, parchment/vellum, or other non-paper items, wear nitrile gloves. DO NOT wear gloves when handling paper—they will snag and tear it!
(nitrile gloves and color targets are located in both 1142 and 1144)

5. Once Silverfast is open and running, you'll need to set up color calibration before you move onto scanning. This step should be done **every time** the scanner is turned on. (Otherwise, the images take on a sickly green hue…) The scanner you are using should have been IT8 auto-calibrated already. If you're not sure, ask a 1142 Tech student for help.

   Prescan a Golden Thread target. ***(Don't touch the color patches. Grease from your skin ruins them!)***
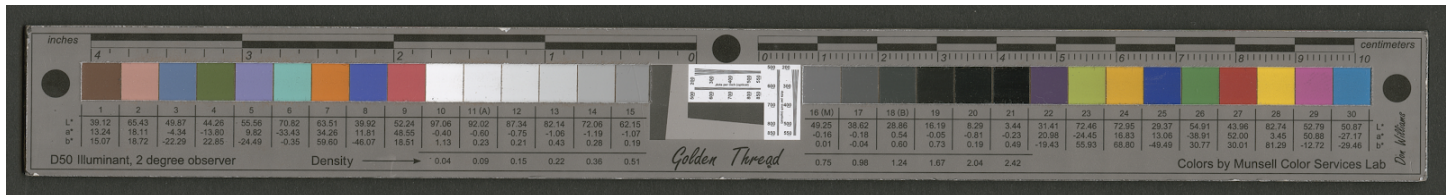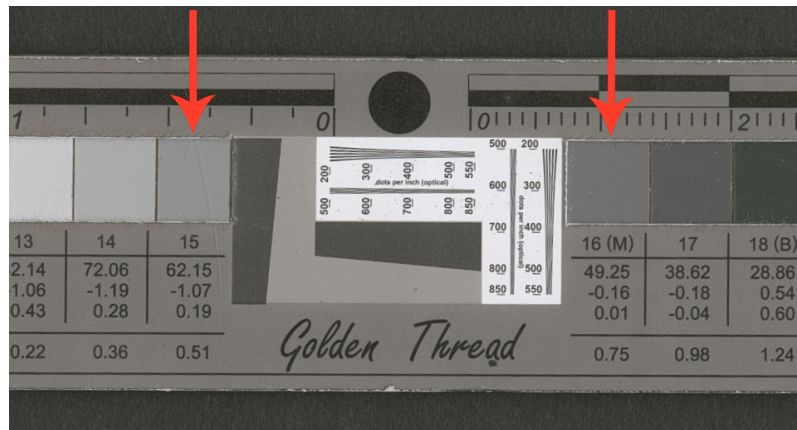

   If previous color card settings are still saved when the program is opened, click and hold on the Pipette icon, and choose "Reset Automatic."
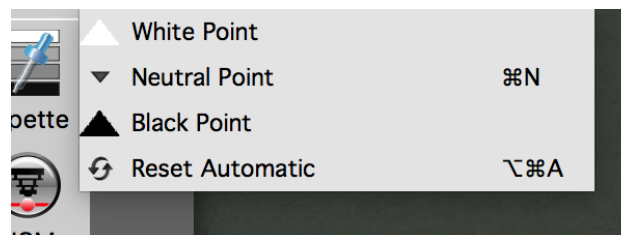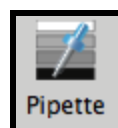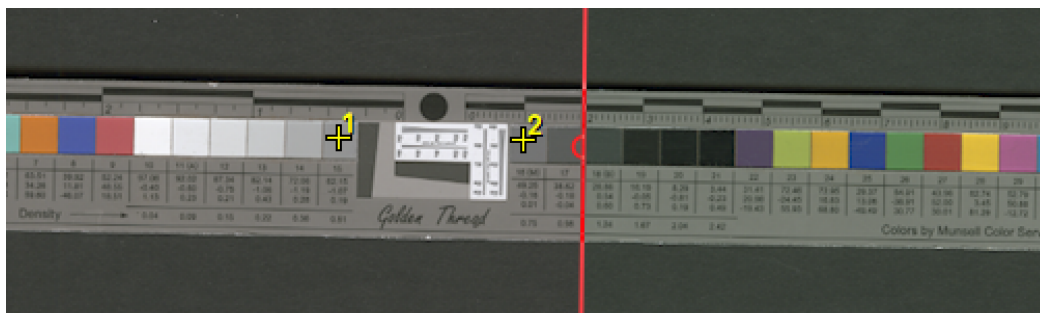

Next, click and hold on the Pipette icon again, and choose "Neutral Point" (or press ⌘-N)

Click the dropper once on Patch 15. Select the Neutral Dropper again, and click it once on Patch 16.
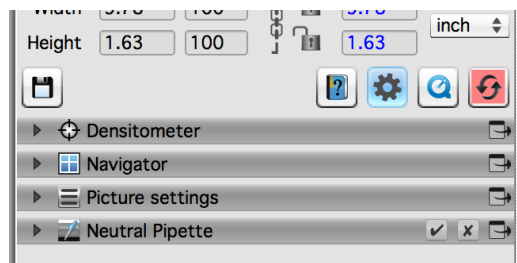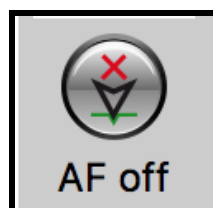

15 and 16 are the two centermost gray patches

Now the color inside the red scanbox is neutral! You should do this every time the scanner or Silverfast is turned on. See the difference?!

6. **Make sure "AF" (Auto-Focus) and any color calibration by Silverfast are turned off. (Besides the Neutral Dropper, of course)** The center strip in the screen should look like this:

Scanning!

Lift the lid of the scanner and place your item face down. Place a piece of black poster board on top of your item. Close the scanner.

"Scan dimensions" should be as follows:

Name: File Name according to call number, etc.
File Type dropdown: TIFF or JPEG, usually
**Path:** Click the little blue folder to specify where you intend to save the file
Format: Custom
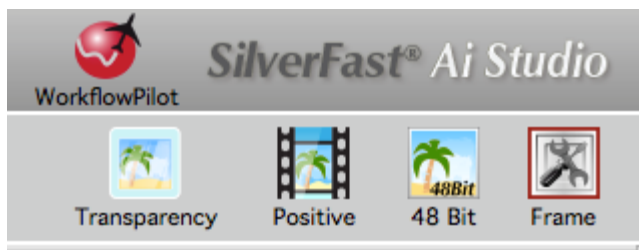**Preset:** This will change depending on ppi
ppi: Set to whatever your project dictates
Zoom: 100%

Usually for textual CONTENTdm items (aka paper with writing on it), the **TIFF** images going into the "Originals" folder, will be scanned at **400 ppi.** If you're scanning photographs, check the project specs for ppi.
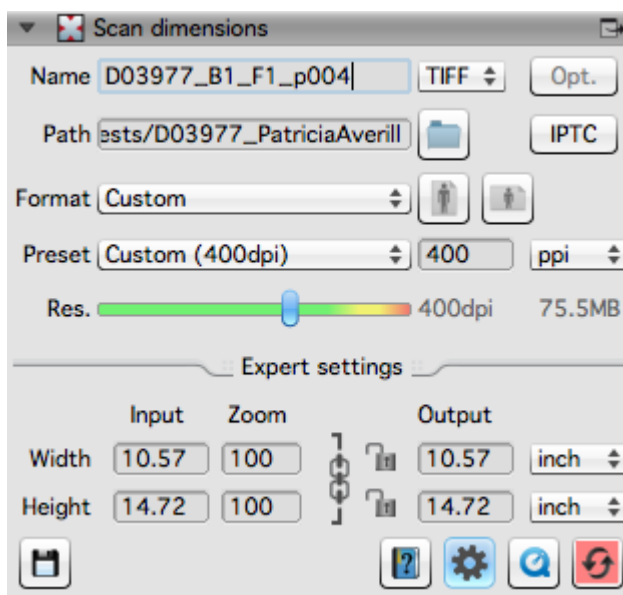

7. As well, make sure that the "48 Bit" icon with the palm tree is showing:

> This will create scans that are **16 bit**. It may not make sense, but trust me on this one. The 16 bit setting turns the scans black and white, but we found that the 48 Bit setting produces 16 Bit tiffs without changing the color...that's why.

8. Click **"Prescan"** and wait for the scanner to show your image. Then you will adjust the scan size so that you're not scanning the entirety of the glass. You can rotate or flip the onscreen image by using the "Rot/Flip" button.

9. **Drag** the red crop box to the item you want to scan. Click and drag the corners or the sides to **resize**, and the circles in the middle of each line to **rotate**. Make a crop that provides a beautiful, straight, and thin black border. Not too big, not too little. Enough to show that the item you're scanning has edges, and to be able to tell that the edges have ended and there is black behind the item.

Rot/Flip

10. **Double-check the scan name, save location, and set your PPI** to the appropriate settings for the order/project. (If you are unsure what PPI to scan at, check the order form or project database for details.)

11. If the lids have been taken off the scanner to facilitate scanning oversized items that need stitching, be sure to use weights on top of the cardstock to flatten down the images. We want nice, flat, crispy images, like the first batch of chocolate chip cookies you made when you were eight years old!

12. When you are ready to scan, click **Scan**
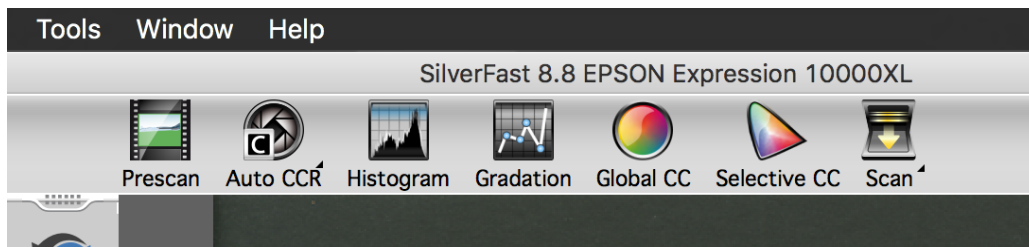
13. The "Scanner Status" in the lower left corner of SilverFast shows the progress of the scan. Wait until the item has scanned. Once the item finishes scanning and the scan appears in the correct folder in the Finder, then you have scanned it correctly!
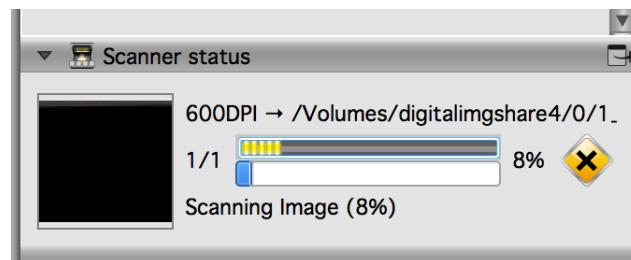
14. Remove the item and go on to scan the next image, adjusting the red crop box as needed.

15. Once you finished scanning, be sure that the scanner is **turned off**, all documents are put away, and you didn't leave the last item you scanned inside the scanner.

<p style="text-align:center; color:blue;">**Congratulations, you scanned on the flatbed scanner!**</p>

Creating a Loading Spreadsheet by Hand

Purpose:

This write-up will show you how to extract the metadata from a finding aid and create the Excel "loading spreadsheet" used to upload images into CONTENTdm.

What's the relationship between finding aids and loading spreadsheets?

A **finding aid** is a document that contains detailed information about a specific collection of manuscripts. It contains biographical and historical information about people or things mentioned in a collection. It also contains notes about restrictions on the use of the materials, and *most importantly for us*, a detailed list of all the contents in a collection. This list goes into our spreadsheets.

Finding aids "describe" --aka designate-- levels of organization within a collection. The number and types of levels is subjective; it varies from collection to collection. For instance, let's pretend we have 2 different collections, each made up of 10 boxes. Each box contains 5 folders and each folder contains 10 photographs. Each collection thus has 500 photographs in it. The finding aid to collection #1 "describes" the lowest level of its collection to be the folders. This means that the person who wrote the list of contents wrote a general description for each folder (Ex: "10 photos of Hawaii," "10 photos taken in Moab, 1878"). They didn't drill down to a photo-by-photo description. In this case, each folder of 10 photographs would be scanned and uploaded as one "compound object". The collection would contain a total of 50 compound objects (and 50 uploads).

The finding aid for collection #2, however, "describes" or designates the lowest level as the photographs themselves. We call this "item level description" because someone took the time to describe every single item/photo invidually (Ex: "Photo 1: William Henry Jackson on a horse, 1902." "Photo 2: William Henry Jackson in Monument Valley, 1903.") If a finding aid has item level descriptions, each photograph is considered one compound object, which means we'll be scanning and uploading a total of 500 compound objects.

It is up to the curators to decide what the lowest level is. Ultimately it doesn't matter to us how many levels a finding aid describes. All we need to worry about is what the finding aid describes as the lowest level, because our compound objects are always whatever the lowest level of description is.

Finding aids are written according to a set of rules known as **DACS (Describing Archives: A Content Standard)**. All digitized collections must be DACS-compliant. This is something the curators discuss before they approve a digitization project. They want to make sure that the lowest level of description is uniform throughout the boxes.

FYI, we create two "digital" levels for ourselves as we scan. The higher "compound object level" aka the project's metadata: call number, author, date, order, etc., (aka the "skittles bag") and 2.

the "item level," aka the actual jpeg(s)(item levels exist for all the individual skittles). Our two levels are used by ContentDM to organize the metadata and the scans.

What you need to know before using this write-up:

1. You need to know which project you are working on (its call number) and the location of its scans.
2. You need the link to the finding aid for the collection in the HBLL's finding aids database.

Assumptions:

- This write-up assumes that the project has a complete Finding Aid.
- This write-up assumes that images that have passed QA.
- This write-up assumes that there is a folder named after the collection's call number in DI1 or DI4 (this is dubbed the "Project Folder"). This Project Folder contains subfolders for every compound object named CALLNUMBER_B#_F#_I#_S#, where the callnumber has no spaces and B#= Box number (if extant), F#= Folder number (if extant), I#= Item number (if extant), and S#= Series number (if extant).

Creating a Loading Spreadsheet: The Steps

Your supervisor may create a blank loading spreadsheet template for each project. The template loading spreadsheet for each project should be located in the Project Folder. Row 1 of the spreadsheet contains all of the column labels, and they have been color-coded, to help you understand which columns need what types of editing. The color code is as follows:

Teal: These columns follow their own rules and will need your edits (see instructions below)

Yellow: Copied from "Get Metadata" button in Finding Aid

Regular: Assumed to be left blank and/or filled in from Get Metadata, no need to edit.

Yellow in black: Needs to be manipulated somehow after copying from "Get Metadata".

Pink: Copy from Finding Aid website by hand (only applies to one cell: AD2, the General Notes)

Grey: Cell contents supplied by supervisor

Green: Same information in each cell, copied down from Row 2 to every succeeding row
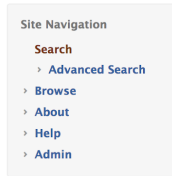
Orange: Same information across all spreadsheets, **only** located in Row 2.

Red: Dates you will supply, in the MM-YYYY format

Row 2, aka the "Compound Object Level"

Step 1: Copying Metadata from Finding Aid

1. Open the spreadsheet template.
2. Open the finding aid website https://findingaid.lib.byu.edu/ and click on "Admin" on the right side.

Site Navigation

Search
› Advanced Search
› Browse
› About
› Help
› Admin

3. Login with your netid.
4. Search for the project you are working on by entering the call number (place parenthesis around the entire call number if it doesn't pull up right away).

Search Results

Vault MSS 520 [Search]

Advanced Search »

Your search returned 8 results.   Ordered by: Most Relevant   Apply

[1]

Site Navigation

Search
› Browse
› About
› Help
› Admin

Sfondrati family papers regarding Guadalcanal
Call Number: Vault MSS 516
Dates: 1599–1659
Summary: Contains handwritten and printed items relating to the administration of the fiefdom of Guadalcanal. Includes information on the assignment of the area to Ercole Sfondrati, as well as its later administration. The materials also document the conflict between Sfondrati and Gaspar Alfonso Perez de Guz…

Sfondrati family papers
Call Number: Vault MSS 523
Dates: 1478–1593
Summary: Contains handwritten documents on parchment related to members of the Sfondrati family. These materials concern personal as well as political and Church matters in Cremona and Mantua, Italy, and other parts of the region.

Sfondrati family papers
Call Number: Vault MSS 520
Dates: 1501–1665
Summary: Contains depositions, legal opinions, letters, and other materials from the Sfondrati family. Much of the materials deal with the inheritance of lands from Isabella di Capua, of the Cybo–Malaspina family of Massa.

5. If it's a collection with many items, you must go to the boxes on the right side of the screen and drill down to the lowest "level" until you find the page for your specific compound object. If the first set of hyperlinks are Series numbers, refer the the _S# part of your item's identifier to see what series it's under.

Ex: for MSS1779_O7_F12_I8_S3, you would click on "Series 3" link in the top box, then the 1st link in the bottom box.

Ex: for VMSS520_F1_I1, there is no series, so you just would click on the 1st link in the box:

Series in MSS 1779

- **Series 3** Land indentures
  Dates: 1625–1649
- **Series 4** Land indentures
  Dates: 1650–1674
- **Series 5** Land indentures
  Dates: 1675–1699
- **Series 6** Land indentures
  Dates: 1700–1724
- **Series 7** Land indentures
  Dates: 1725–1749
- **Series 8** Land indentures
  Dates: 1750–1774

Item/oversize in Series 3

- **Item 8 oversize 7 folder 12** Thomas Rolfe condition and bond
  Dates: 1625 April 26
- **Item 1 oversize 7 folder 1** Francis Muscott final concord
  Dates: 1625 November
- **Item 2 oversize 6 folder 9** John Gratnell quitclaim
  Dates: 1626 April 11
- **Item 5 oversize 6 folder 3**

Collection Arrangement

Yellow highlight indicates current location collection description

Item/folder in Vault MSS 520

- **Item 1 folder 1** Philippus Vercellensis document for Margherita Homodeo Sfondrati
  Dates: 1501 May 15
- **Item 2 folder 1** Instrument of dowry between Alberico I Cybo–Malaspina and Isabella di Capua
  Dates: 1563 March 13
- **Item 3 folder 1** Will of Isabella di Capua

This opens the finding aid for folder 1 and item 1 in this collection:

Philippus Vercellensis document for Margherita Homodeo Sfondrati

Purchase a Digital Copy

Dates: 1501 May 15

- **Extent:** 1 sheet : vellum ; 18 x 28 cm
- **Call Number:** Vault MSS 520 Item 1 folder 1
- **Repository:** L. Tom Perry Special Collections; 20th Century Western & Mormon Manuscripts; 1130 Harold B. Lee Library; Brigham Young University; Provo, Utah 84602; http://sc.lib.byu.edu/
- **Access Restrictions:** Open for public research.

Full Details	Admin Info

Languages and Scripts

Latin

Conditions of Use

It is the responsibility of the researcher to obtain any necessary copyright clearances. Permission to publish material from the Sfondrati family papers must be obtained from the Supervisor of Reference Services and/or the L. Tom Perry Special Collections Board of Curators.

Note

Manuscript.

Preferred Citation

Philippus Vercellensis document for Margherita Homodeo Sfondrati; Vault MSS 520; Sfondrati family papers; L. Tom Perry Special Collections; 20th Century Western & Mormon Manuscripts; 1130 Harold B. Lee Library; Brigham Young University; Provo, Utah 84602; http://sc.lib.byu.edu/

Genre / Form

Certificates

6. Once you are at the lowest level of the finding aid that matches the item to be uploaded, access the metadata for this item by clicking on the "Get metadata" link on the right. *This is why logging in as an admin at the beginning (steps 4 & 5) are crucial!* If you don't log in as an admin, when you go to find the metadata link it will not appear.

Not logged in:

Philippus Vercellensis document for Margherita Homodeo Sfondrati

Request a Digital Copy

Dates: 1501 May 15

- **Extent:** 1 sheet : vellum ; 18 x 28 cm
- **Call Number:** Vault MSS 520 Item 1 folder 1
- **Repository:** L. Tom Perry Special Collections; 19th Century Western & Mormon Manuscripts; 1130 Harold B. Lee Library; Brigham Young University; Provo, Utah 84602; http://sc.lib.byu.edu/
- **Access Restrictions:** Open for public research.

Full Details | Admin Info

Languages and Scripts
Materials are in Italian and Latin.

Conditions of Use

Site Navigation
- Search
- Browse
- About
- Help
- Admin

Search this Collection

Search

Collection Arrangement

Logged in:

Philippus Vercellensis document for Margherita Homodeo Sfondrati

Request a Digital Copy

Dates: 1501 May 15

- **Extent:** 1 sheet : vellum ; 18 x 28 cm
- **Call Number:** Vault MSS 520 Item 1 folder 1
- **Repository:** L. Tom Perry Special Collections; 19th Century Western & Mormon Manuscripts; 1130 Harold B. Lee Library; Brigham Young University; Provo, Utah 84602; http://sc.lib.byu.edu/
- **Access Restrictions:** Open for public research.

Full Details | Admin Info

Languages and Scripts
Materials are in Italian and Latin.

Conditions of Use
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Site Navigation
- Search
- Browse
- About
- Help
- Admin

- Get metadata

Search this Collection

Search

Collection Arrangement

7. Click on "Get metdata" and it will open a table view of the item's metadata:

Manuscript Collection Descriptions

Creator	Contributors	Title	Alternative Title	Description	Date Original	Date Span	Edition	Publisher (Original)	Physical Description	Scale	Extent	Medium	Dimensions	Arrangement	Degree/Dissertation Note	Contributing Institution	Names	Topics	Geographic Place Names	Genre	Occupations	Functions	Subject	Language
		Philippus Vercellensis document for Margherita Homodeo Sfondrati			1501 May 15	1501	Electronic version		1 sheet : vellum ; 18 x 28 cm							L. Tom Perry Special Collections, Harold B. Lee Library, Brigham Young University				Certificates				Latin

(Yes, it's a looooooong row of data!)

8. The fields should correspond (in name and order) to the fields in your loading spreadsheet. Highlight/select the stuff in the very first column (usually "Title") then select the metadata for everything else to the right by scrolling over:

Title	Alternative Title	Description	Date Original	Date Span	Edition	Publisher (Original)	Physical Description	Scale	Extent	Medium	Dimensions	Arrangement	Degree/Dissertation Note	Contributing Institution	Names	Topics	Geographic Place Names	Genre	Occupations	Functions	Subject	Langua
Philippus Vercellensis document for Margherita Homodeo Sfondrati			1501 May 15	1501	Electronic version		1 sheet : vellum ; 18 x 28 cm							L. Tom Perry Special Collections, Harold B. Lee Library, Brigham Young University				Certificates				Latin

9. Make sure to end having selected the content from Title (generally) to "Call Number," or whatever the last field in the table view is. **Be careful not to copy the footer information of the webpage:**

Creator	Contributors	Title	Alternative Title	Description	Date Original	Date Span	Edition	Publisher (Original)	Physical Description	Scale	Ex
		Philippus Vercellensis document for Margherita Homodeo Sfondrati			1501 May 15	1501	Electronic version		1 sheet : vellum ; 18 x 28 cm		

P.O. Box 26800, Provo, UT 84602–6800
(801) 422–2927

10. Using COMMAND+C and COMMAND+V, copy the content into your excel, clicking under whatever column corresponds to first column of metadata (usually "Title"). Hopefully, most of the metadata then copies under the right column across the entire excel.

E	F	G	H	I	J	K	L
Title	Alternative Title	Description	Date Original	Date Span	Edition	Publisher (Original)	Physical Description
James Holt autobiography		Typescript of an autobiography. Holt writes about his childhood, conve	1881	1881	Electronic version		1 folder (0.08 linear ft

This is a good time to save your spreadsheet!

Step 2: Editing Row 2

Field A2 (CDM_LVL): enter a 0 in cell 2A.

Field B2 (CDM_LVL_Name): Copy the content from the "Title" field (Column E) and paste it into cell B2.

fx Philippus Vercellensis document for Margherita Homodeo Sfondrati

B	C	D	E	
CDM_LVL_Name	Creator	Contributors	Title	Al
Philippus Vercellensis document for Margherita Homodeo Sfondrati			Philippus Vercellensis document for Margherita Homodeo Sfondrati	

At this point you need to edit a few pieces of the following metadata:

Edit N-P (you may not need to edit field O2). Start with the Physical Description entry (N2). Physical Description wll have several parts, which you need to cut and paste into N2 and P2. Example:

Before   *After:*

L	M	N	O	P		L	M	N	O	P
---	---	---	---	---		---	---	---	---	---
al Physical Descriptio	Scale	Extent	Medium	Dimensions An		Physical Descriptio	Scale	Extent	Medium	Dimensions An
1 sheet : vellum ; 18 x 28 cm						1 sheet : vellum ; 18 x 28 cm		vellum		18 x 28 cm

Physical Description (L) only retains the first part, where it numbers/describes whatever you just scanned. Extent (N) is anything between two semi-colons. Dimensions (P) is... you know... dimensions (4" x 6", etc).

Edit field AA2. Finding Aid will have given you the whole name(s) of the language(s) used in this compound object, but you <u>must</u> add the abbreviations from the [Library of Congress Language Code List](). The information in this cell should read:

[name of language]; [3-digit abbreviation from list, if extant]; [2-digit abbreviation from list, if extant]

Before   *After:*

AA		AA	
---	---		---	---
Language	Aud		Align Text Left	A
Latin			Latin; lat; la	

Edit field AD2. For reasons untold, the "Get Metadata" button on the finding aid website does NOT copy over Notes. Look at the item's finding aid page in the "Full Details" box to see if there are any Notes. If so, copy and paste them into AD. Example-

Full Details	Admin Info

Languages and Scripts

 English

Conditions of Use

 It is the responsibility of the researcher to obtain any necessary copyright clearances. Permission to publish material from Kane family papers must be obtained from the Supervisor of Reference Services and/or the L. Tom Perry Special Collections Coordinating Committee.

Note

 Holograph, signed.

Preferred Citation

 Jesse C. Little letter to Brigham Young; Vault MSS 792; Kane family papers; L. Tom Perry Special Collections; 19th Century Western & Mormon Manuscripts; 1130 Harold B. Lee Library; Brigham Young University; Provo, Utah 84602; http://sc.lib.byu.edu/

Other Finding Aids

 File-level inventory available online. http://files.lib.byu.edu/ead/XML/VMSS792.xml

Genre / Form

 Letters

AC	AD	
Condition	General Notes	Collection
	Holograph, signed.	

Double-check field AH2 for a SIRSI ID. If there is no SIRSI ID, ask your supervisor, they know where to find it.

Before:
After:

AH	
SIRSI ID	**Call**
SS L. ;;	Vaul 520 fold
n h	

AH	
SIRSI ID	**Ca**
S -- DBP2247	Va 52 fol

Edit fields AU2. This entry depends on the content of the image: if it is textual or photographic in nature, and if it's a jpg or pdf. Some examples of the content of this field could be "text/jpg" or "image/jpg". If the "soul" of the image is its text (like, a journal page), it's text/jpg. If it's a photograph, it's "image/jpg".

Edit field AW2. This is a date field, which should contain the date that you create the spreadsheet. It should be represented in a YYYY-MM format.

Edit fields BG2 and BL2 by copying and pasting the Compound Object's folder name into cells BG2 and BL2.

See Glossary for other edits to this row (though you can save this step til the end).

Step 3: Rows 3-100000: Item Level Edits

At this point you have prepared row 2, aka the compound object level. Now you need to make sure the item level rows are correct. To do this, first count the number of jpegs to upload, then perform the following steps (some of these seem out of order, but I promise this is the easiest order):

Field E is usually just a sequential numbering of the images. For photographs this will be "Image 1, Image 2, Image 3" etc: one row for each jpeg. For text based materials it will typically be "Page 1, Page 2, Page 3, etc." Don't forget to include the printing version at the end. Just enter it as "Print Version". If you have any questions or come across anything out of the ordinary, please talk to your supervisor.

Field B (CDM_LVL_Name): This column's entry depends on the type of collection you're scanning.
- If the collection consists of a single item to upload, enter the Call Number ("MSS 8978") in Column B for as many rows as you have jpegs.
- If the collection has multiple compound objects to upload, enter this Compound Object's identifier, spelled out, for as many rows as you have jpegs. Example:
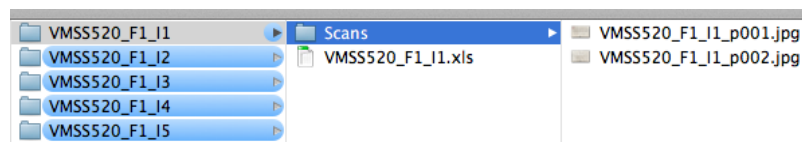
We are uploading the Compound Object "Folder 1 Item 1" and type that into two rows, since we only have two jpegs:

Representation in Excel:

After you fill in the Call Number/Compound Object for as many rows as there are scans, you will add one more row onto the bottom and write "Printing Version [filesize]" in Column B. Fill in the printing version's file size, which is found by right clicking on the printing version in Finder > Get Info > and it will appear next to "size" in bytes.
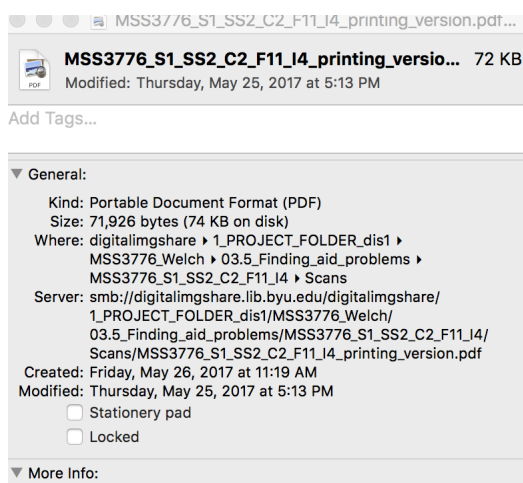
For example, if I were to enter the size file shown above, the cell would read: "Printing version [72KB] "

1	Carton 13 folder 84			Page 13	
1	Printing version [409 kb]			Printing Version	

Field A (CDM_LVL): write a 1 in this column for every row that has a jpeg and for the printing version row.

Fields AK-AQ: copy the same data from Row 2 down as many rows as there are jpegs and printing version. (See the review of these fields below for this information)

Fields AU, AW: just copy the same data from Row 2 down as many rows as there are jpegs. For the Printing Version, type "application/pdf" in AU.

Field AV: Refer to Conversion Specifications Write-up for the proper language for each type of scanner. Check to see if any files in the compound object were scanned on different scanners (was this compound object scanned half on a BC-100 and half on a flatbed? If so, you need to fill out the conversion specifications in column AV that accurately correspond to the scanner used for each jpeg). Copy this data into the printing version row, as well.

Field BA: type SHA1 into Row 3 and copy down for as many rows as there are jpegs and printing version.

Fields BG and BL: in Finder, select the entire set of jpegs and press CMD-C. Paste the file names into both columns.

        a.   Example (BG, page level)-

Filename
VMSS519_F1_I1
VMSS520_F1_I1_p001.jpg
VMSS520_F1_I1_p002.jpg

Also add the printing version's filename in both columns after the last jpg:

MSS3776_S1_SS1_C13_F84_printing_version.pdf					MSS3776_S1_SS1_C13_F84_printing_version.pdf

Step 4: NOW IT'S TIME TO REVIEW

Now it's time to look over the whole spreadsheet and make sure each cell is correct. The following color schemes match the colors at the top of the spreadsheet template. They can help you understand what in the template is edited, and how.

Teal: These follow their own rules and will need editing (see Write-up instructions)
Yellow: Copied from Get Metadata
Regular: Assumed to be left blank and/or filled in from Get Metadata, no need to touch.
Yellow in black: Needs to be manipulated somehow after copying from "Get Metadata".
Pink: Copy from Finding Aid by hand (aka AD, the General Notes)
Grey: Supplied by supervisor
Green: Same information always, copied down from Row 2 to every succeeding row
Orange: Same information always, but **only** located in Row 2.
Red: Dates

Field A: CDM_LVL

Compound object level= 0
Page= 1

Field B: CDM_LVL Name

Compound object level= Comes from the "TITLE" field (field E), which comes from the finding aid.

Example: Charles Emmanuel I letter to the count of Avignon

Page= Describes the structure of the physical object.

Example: Folder 1 item 1 OR MSS 8898

Field C: Creator

Compound object level= Content is copied from the finding aid.

Example: This field contains content about 20% of the time when copied from the finding aid.

Page= BLANK

Field D: Contributors

Compound object level= Content is copied from the finding aid.

Example: There is usually no content in this field when copied from the finding aid

Page= BLANK

Field E: Title

Compound object level= Content is copied from the finding aid.

Example: Charles Emmanuel I letter to the count of Avignon

Page= This should describe the type of image and number it sequentially (or as the page itself is paginated).

Example: Page 1, Page 2, Page 3, etc. (for each row)

Field F: Alternative Title

Compound object level= Content is copied from the finding aid.

Example: There is usually no content in this field when copied from the finding aid

Page= BLANK

Field G: Description

Compound object level= Content is copied from the finding aid.

Example: There is usually no content in this field when copied from the finding aid

Page= BLANK

Field H: Date Original

Compound object level= Content is copied from the finding aid.

Example: 1580 December 16

Page= BLANK

Field I: Date span

> Compound object level= Content is copied from the finding aid.

>> Example: 1580

> Page= BLANK

Field J: Edition

> Compound object level= Content is copied from the finding aid.

>> Example: Electronic version

> Page= BLANK

Field K: Publisher (Original)

> Compound object level= Content is copied from the finding aid.

>> *Example: There is usually no content in this field when copied from the finding aid*

> Page= BLANK

Field L: Physical Description

> Compound object level= Content is copied from the finding aid.

>> Example: 1 folded sheet (1 page) ; 32 x 44 cm, folded to 32 x 22 cm

> Page= BLANK

Field M: Scale

> Compound object level= Content is copied from the finding aid.

>> Example: There is usually no content in this field when copied from the finding aid

> Page= BLANK

Field N: Extent

> Compound object level= Comes from the "Physical description" field (field L), which comes from the finding aid. You will copy just the portion of the content in the "Physical Description" field that describes the extent of the physical item.

>> Example: 1 folded sheet (1 page)

> Page= BLANK

Field O: Medium

> Compound object level= Content is copied from the finding aid.

*Example: There is usually no content in this field when copied from the finding aid.
However for a photograph collection there might be something in the physical
description that describes the type of photograph and would need to be copied
into this field.*

Page= BLANK

Field P: Dimensions

Compound object level= Comes from the "Physical description" field (field L), which
comes from the finding aid. You will copy just the portion of the content in the "Physical
Description" field that describes the dimensions of the physical item.

Example: 32 x 44 cm, folded to 32 x 22 cm

Page= BLANK

Field Q: Arrangment

Compound object level= Content is copied from the finding aid.

Example: There is usually no content in this field when copied from the finding aid

Page= BLANK

Field R: Degree/Dissertation Note

Compound object level= Content is copied from the finding aid.

Example: There is usually no content in this field when copied from the finding aid

Page= BLANK

Field S: Contributing Institution

Compound object level= Content is copied from the finding aid.

*Example: L. Tom Perry Special Collections, Harold B. Lee Library, Brigham Young
University*

Page= BLANK

Field T: Names

Compound object level= Content is copied from the finding aid.

*Example: There is usually no content in this field when copied   from the finding
aid*

Page= BLANK

Field U: Topics

> Compound object level= Content is copied from the finding aid.

>> *Example: There is usually no content in this field when copied from the finding aid*

> Page= BLANK

Field V: Geographic Place Names

> Compound object level= Content is copied from the finding aid.

>> *Example: There is usually no content in this field when copied from the finding aid*

> Page= BLANK

Field W: Genre

> Compound object level= Content is copied from the finding aid.

>> *Example: Letters*

> Page= BLANK

Field X: Occupations

> Compound object level= Content is copied from the finding aid.

>> *Example: There is usually no content in this field when copied   from the finding aid*

> Page= BLANK

Field Y: Functions

> Compound object level= Content is copied from the finding aid.

>> *Example: There is usually no content in this field when copied from the finding aid*

> Page= BLANK

Field Z: Subject

> Compound object level= Content is copied from the finding aid.

>> *Example: There is usually no content in this field when copied from the finding aid*

> Page= BLANK

Field AA: Language

> Compound object level= Content is copied from the finding aid.

>> Preliminary example: Italian**

**The finding aid will only include the full word in English of the language of the content of the item. However to follow Dublin Core standards you must find the additional three and two letter code for the language from this site:

http://loc.gov/standards/iso639-2/php/code_list.php

If you do a "COMMAND+F" and search for "italian" you will see that the three letter code is "ita" and the two letter code is "it". This must be represented in the Language field for the compound object separated by a semi-colon and space.

Final example: Italian; ita; it

Page= BLANK

Field AB: Audience

Compound object level= Content is copied from the finding aid.

Example: There is usually no content in this field when copied from the finding aid

Page= BLANK

Field AC: Condition

Compound object level= Content is copied from the finding aid.

Example: There is usually no content in this field when copied from the finding aid

Page= BLANK

Field AD: General Notes

Compound object level= Content is copied from the finding aid by hand! For some reason the "Get metadata" button does not fill the content from the "Note" field in the finding aid into the metadata table we copy from. So this field will be blank when you copy from the "Get metadata" table view, but you need to go back to the original view of the finding aid and see if there is any content in the "Note" field. If there is you will copy it into the "General Notes" field of your loading spreadsheet.

Charles Emmanuel I letter to the count of Avignon

Dates: 1580 December 16

- **Extent:** 1 folded sheet (1 page) ; 32 x 44 cm, folded to 32 x 22 cm
- **Call Number:** Vault MSS 519 Item 1 folder 1
- **Repository:** L. Tom Perry Special Collections; 20th Century Western & Mormon Manuscripts; 1130 Harold B. Lee Library; Brigham Young University; Provo, Utah 84602; http://sc.lib.byu.edu/
- **Access Restrictions:** Open for public research.

Full Details | Admin Info

Languages and Scripts

Italian

Conditions of Use

It is the responsibility of the researcher to obtain any necessary copyright clearances. Permission to publish material from Sfondrati family papers must be obtained from the Supervisor of Reference Services and/or the L. Tom Perry Special Collections Board of Curators.

Note

Holograph, signed.

Preferred Citation

Charles Emmanuel I letter to the count of Avignon; Vault MSS 519; Sfondrati family papers; L. Tom Perry Special Collections; 20th Century Western & Mormon Manuscripts; 1130 Harold B. Lee Library; Brigham Young University; Provo, Utah 84602; http://sc.lib.byu.edu/

Genre / Form

Letters

Example: Holograph, signed.

Page= BLANK

Field AE: Collection

Compound object level= Content is copied from the finding aid.

Example: Sfondrati family papers

Page= BLANK

Field AF: Link to Finding Aid

Compound object level= Content is copied from the finding aid.

Example: http://findingaid.lib.byu.edu/viewItem/Vault%20MSS%20519/Item%201/folder%201

Page= BLANK

Field AG: Source

Compound object level= Content is copied from the finding aid.

Example: Charles Emmanuel I letter to the count of Avignon; Vault MSS 519; Sfondrati family papers; L. Tom Perry Special Collections; 20th Century Western & Mormon Manuscripts; 1130 Harold B. Lee Library; Brigham Young University; Provo, Utah 84602; http://sc.lib.byu.edu/

Page= BLANK

Field AH: SIRSI ID

Compound object level= Your Supervisor must give you the SIRSI ID. She gets it from the WorkFlows database, which you do not have access to. The SIRSI ID does not change for a collection, so once you know the number you will just need to copy it from the template.

> *Example:* DBP2247, a1160919

Page= BLANK

Field AI: Call Number

Compound object level= Content is copied from the finding aid.

> *Example:* Vault MSS 519 Item 1 folder 1

Page= BLANK

Field AJ: Full text

Compound object level= BLANK

Page= If there is a transcript than you will have to copy the text for each image into the row the image belongs to. We normally don't load the full-text in the loading spreadsheet because it has never worked for me! Typically I upload the full text after the images are in CONTENTdm using the Project Client

> *Example:* There is usually no content in this field.

Field AK: Copyright Status

Compound object level= Public domain

Page= Public domain

Field AL: Rights management

Compound object level= http://lib.byu.edu/about/copyright/special_collections.php

Page= http://lib.byu.edu/about/copyright/special_collections.php

Field AM: Rights holder

Compound object level= Brigham Young University

Page= Brigham Young University

Field AN: Contact Address of Rights Holder

Compound object level= ATTN: Supervisor of Reference Services, 1130   Harold B. Lee Library, Brigham Young University, Provo, Utah 84602

Page= ATTN: Supervisor of Reference Services, 1130 Harold B. Lee Library, Brigham Young University, Provo, Utah 84602

Field AO: Contact Phone of Rights Holder

Compound object level= 801-422-3175

Page= 801-422-3175

Field AP: Contact E-Mail of Rights Holder

Compound object level= specialcollections@byu.edu

Page= specialcollections@byu.edu

Field AQ: Access Level

Compound object level= Public

Page= Public

Field AR: Publisher (Digital)

Compound object level= L. Tom Perry Special Collections, Harold B. Lee Library, Brigham Young University

Page= BLANK

Field AS: Refresh Date

Compound object level= This is a date field that should be two years from the month and year that you create the spreadsheet. It should be represented in a YYYY-MM format. For instance, if you create the spreadsheet (and will be uploading it in the same month and year) in May of 2018 then the field should be,

Example: 2020-05

Page= BLANK

Field AT: File Type

Compound object level= This depends on if the content of the image is text or photographic in nature. In either instance, the content of this field should be "Text" or "Image".

Example: Text

Page= BLANK

Field AU: Format

Compound object level= This depends on if the "soul" of the item is textual or photographic in nature. If it contains primarily writtin information (like a diary), it's "text".

If it's a photograph of something, it's "image". Some examples of the content of this field could be "text" or "image".

>   *Example:* text

Page= text/jpg, image/jpg, or application/pdf (in the printing version row)

Field AV: Conversion Specifications

Compound object level= BLANK

Page= You must look at the database for this project and find which scanner each image was scanned on. Write the "Conversion specifications" for each scanner used. Write the specific scanner for each image, each row. If one image was scanned on a different scanner, you must differentiate that in its row!

>   *Example:* Epson Expression 10000 xl; Silverfast v.8.0.1r20; attributes: jpg, 200 dpi

Every row needs to have the accurate record of which scanner was used for that image.

Field AW: Date Digital

Compound object level= This is a date field that should be the date that you create the spreadsheet. It should be represented in a YYYY-MM format. For instance, if you create the spreadsheet in January 2018 then the field should be,

>   *Example:* 2018-01

Page= 2018-01

Field AX: Height

Compound object level= BLANK

Page= BLANK (this will however be auto-generated in the Project Client)

Field AY: Width

Compound object level= BLANK

Page= BLANK (this will however be auto-generated in the Project Client)

Field AZ: Checksum

Compound object level= BLANK

Page= BLANK (this will however be auto-generated in the Project Client)

Field BA: Checksum Method

Compound object level= BLANK

Page= SHA1

Field BB: Color space

Compound object level= BLANK

Page= BLANK (this will however be auto-generated in the Project Client)

Compound object level= Web browser. Adobe Acrobat reader.

Page= BLANK

Compound object level= This is the name of the person creating the spreadsheet. This must be represented by "LastName, FirstName".

Example: Memory, Lindsey

Page= BLANK

Compound object level= This must be the date that the spreadsheet was created. As a date field is should be represented as YYYY-MM.

Example: 2013-05

Page= BLANK

Compound object level= This is like the "Digitization Specifications" field. It is the software and version of the tool used to upload the metadata. For us that is the CONTENTdm Project Client. As of today (12-2017) the version was 6.1.0.565. Check Project Client and see if the version # has changed. To do so open, VMWare and open the Project Client. Under the "Help" tab click on "About CONTENTdm Project Client." This will open a window that shows you the version you are currently using:
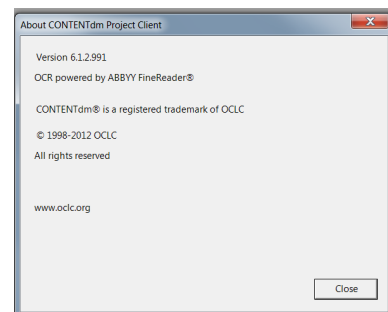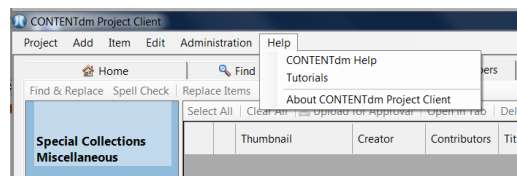
Example: CONTENTdm Project Client, version 6.1.0.565

Page= BLANK

Field BG: Identifier

Compound object level= This should be the name of the folder of the compound object (assuming the project has been organized and the files named correctly). Essentially it is the core of the filename of the images, the part that stays the same. For instance if the filenames are: MSS519_F1_I1_p001.jpg and MSS519_F1_I1_p002.jpg, then the identifier is VMSS519_F1_I1, which should correspond to the name of the folder of the compound object.

Identifier	File Size	Media Type	User name	LIStag	Filename
				byucompounddocument	VMSS519_F1_I1
VMSS519_F1_I1					
MSS519_F1_I1_p001.jpg					MSS519_F1_I1_p001.jpg
MSS519_F1_I1_p002.jpg					MSS519_F1_I1_p002.jpg

Example: VMSS519_F1_I1

Page= This should be the filenames of the images you are uploading. Select the "Scans" folder for your compound object and then do the hot key COMMAND+A to select all the files in that folder. Hit COMMAND+C to copy the filenames. Once copied, select the first cell just under the compound object row under "Identifier" and COMMAND+V paste the filenames down that column. **At the end, add the printing version: MSS519_F1_I1_printing_version.pdf**

Field BH: File size

Compound object level= BLANK

Page= BLANK (this will however be autogenerated in the Project Client)

Field BI: Media Type

Compound object level= BLANK

Page= BLANK

Field BJ: User name

Compound object level= BLANK

Page= BLANK (this will however be autogenerated in the Project Client)

Field BK: LIStag

Compound object level= byucompounddocument

Page= BLANK

Field BL: Filename

Compound object level= leave blank

Page= See instructions for field "Identifier" (field BG)

Step 5: Converting .xlsx to a .txt file

Ok. The Loading spreadsheet is looking good. Due to problems with the .xlsx format, you must create an .ods and then a .csv file from the .xlsx, and then convert your brand new .csv into a .txt file. We use .txt files for final loading process. Loading into CONTENTdm always requires a .txt file. Unfortunately, there's no shortcut.

- ○ Creating the .ods: first, open the loading spreadsheet in **Open Office** and hit "Save As," then toggle the File Format to "OpenDocumentSpreadsheet (.ods)." Save in the same folder as the .xlsx. Click "Ignore" if there are warnings.
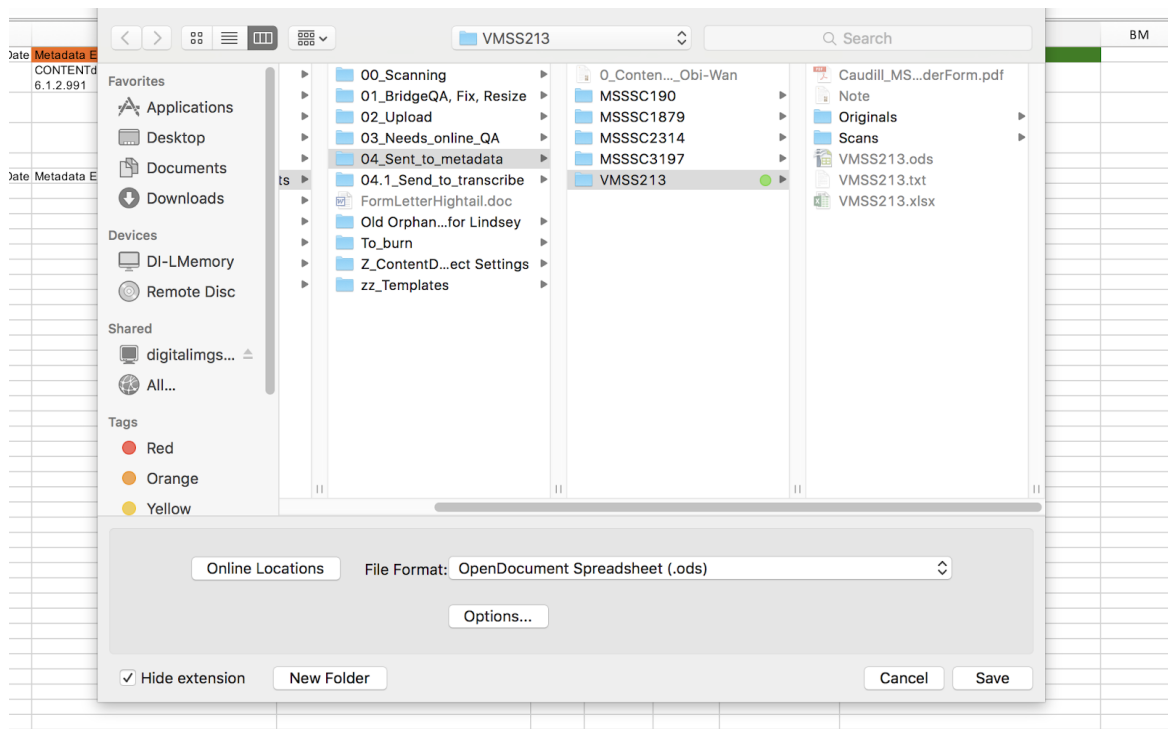
- ○ Creating the .csv file: open the .ods file you just created and save it as a csv file. There will be a series of windows to click through before the file actually saves:
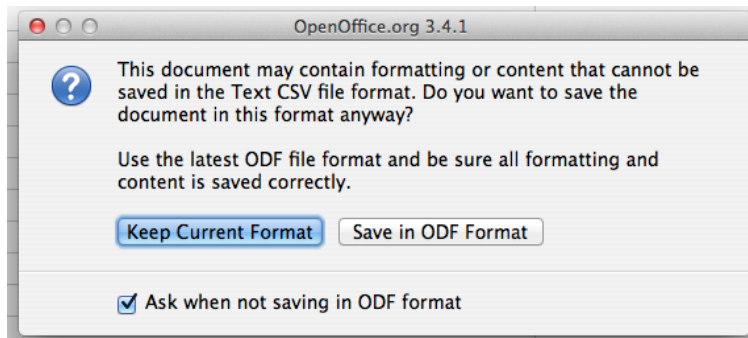
Keep Current Format
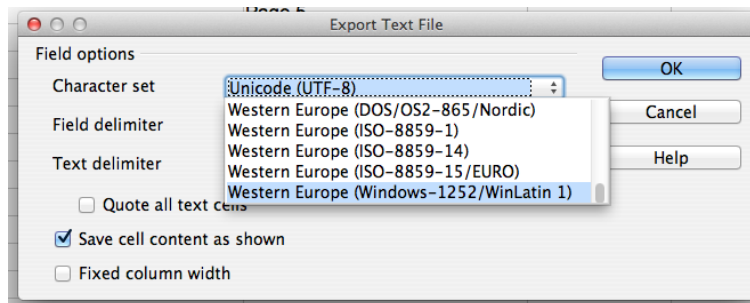
Western Europe (Windows-1252/WinLatin1)
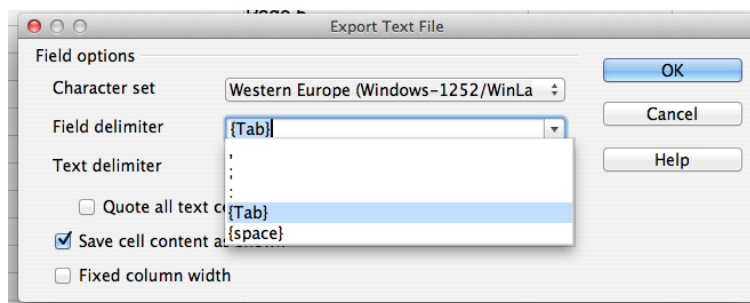
{Tab}

If there is anything-- any mark-- in the Text Delimiter section, delete it.

This window should look like before clicking "OK."
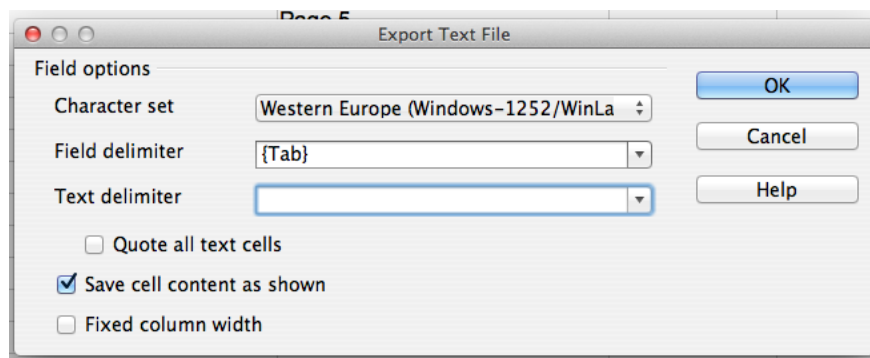
- ○ Converting the .csv file into a .txt file (which is the final goal!): in Finder, simply click on the .csv's filename as if you were going to rename the file, then change the file extension by manually deleting the ".csv" and typing ".txt".
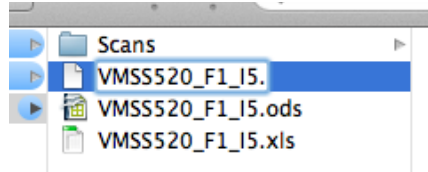
At this point, either click away from the file or hit "return" on your keyboard ro save your change. You will be asked if you want to change the file extension. Click "Use .txt".
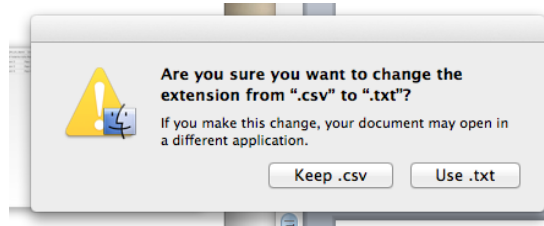
- ○ Once you have converted your spreadsheets to a .txt file you are ready to upload into Project Client!

The Loading Process
for CONTENTdm projects with Finding Aids

✨ *Welcome to the best part of working at the DI Lab! After completing this process, you will feel like a true wiz kid.*✨

It is most effective to load a large batch of compound objects at once, at the end of the day or whenever you can devote an entire computer to the loading process for hours. For the purposes of this write-up, I will show you how to upload a single compound object first and then how to load multiple compound objects.

Before you load into CONTENTdm, you need to have loading .txt files created and saved inside every compound object's folder you are working with (See COMA and Spreadsheet-by-hand write-ups if you don't see a .txt file in the identifier folders).

All objects are loaded through the Project Client software, which is only opened in Windows, through VMWare (aka Windows INSIDE the Mac):
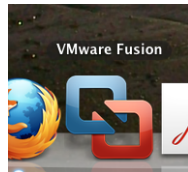
Log in to VMWare's Windows using your netid, then click the Project Client icon to open Project Client:
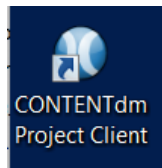
Before you can load anything into the Project Client, make sure you are working in the correct "Project" in Project Client. In the upper left corner of Project Client will be a light blue box with the name of the current project in it, e.g. Land Indentures, Special Collections Miscellaneous 4, Helen Foster Snow, etc.
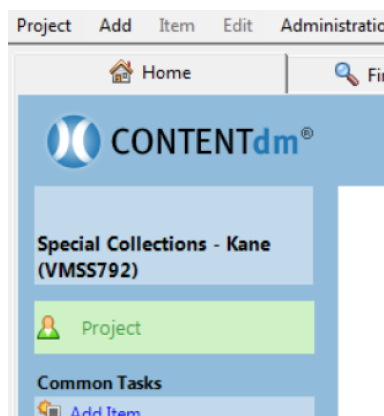
Verify that the project you need to send your compound object to is the same project you are working in, in Project Client. If you are not in the right project, click Project > Open > [Name of your project]. if you don't see the right project in that list, you will have to "create" it on your computer. See "Creating a Project in Project Client" below to add it to your computer. Make sure you follow all the steps, including setting up the metadata template).

Loading a single compound object

- Once you're in the right project, double-check the folder for the compound object you are loading. It should have an Originals and a Scans folder and a .txt files ready to go. Example:
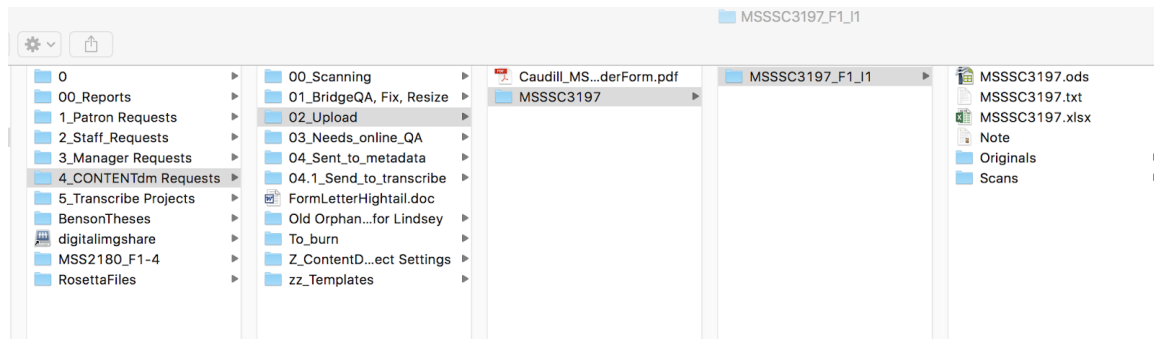
- Back in Project Client, in the left-side bar under "Common Tasks" click "Add Compound Objects."

- This opens a window that says "Add Multiple Compound Objects" which is misleading. You will still be able to load a single compound object from this window. Locate the "Add using" line and verify that the drop-down menu says "**Compound Object Wizard,**" which is at the top of this list and should already be selected. Click "**Add.**"

- Screen 1 - **Single Compound Object - Choose type**. Use the following settings and click "*Next*":

- Screen 2 - **Single Compound Object - Import Type**. Two parts to this window:

1) *Tab-Delimited Text File* - click the "Browse" button to the right of the "File name:" field. Navigate to the **.txt** file you are using:
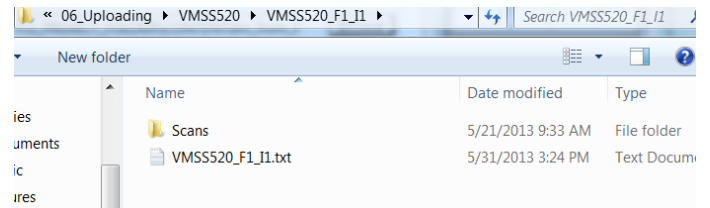
2) *Item Type* - in this section, click the "Browse" button to the right of the "Directory name" field. Navigate to the **"Scans"** folder of image files you are uploading.
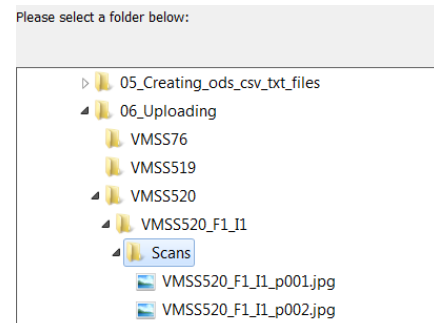
This screen should look something like this. Click "Next":

- Screen 3 - **Single Compound Object - Display Image Settings**. Again, two parts:

  1) Under the *Do you want CONTENTdm to generate . . .* section, click "YES"

  2) *Image Options* - Click the button "Image Options" in the lower left corner. This opens a window called "Project Settings Manager." Under the "File type:" section, uncheck the "Lossy compression" check-box and click "OK." It should look like this:

Once back at Screen 3 - **Single Compound Object - Display Image Settings** click "Next."

- Screen 4 - **Single Compound Object - Page Information**. Under the Specify page names section, click "Label pages using tab-delimited text file" and 2) Under the Transcript section, "No transcripts."

  Specify page names and Transcript section should look like this:

Click "Next."

- Screen 5 - **Single Compound Object - Confirm settings**. This screen is just a summary of all the settings you chose in the previous screens. It will vary with each compound object you load:

Summary of settings for import.

```
Importing single Monograph.
Import using tab delimited file.
Tab delimited file: R:\PROJECTS\1_PROJECT_FOLDER
\CONTENTdm_from_Finding_aid\06_Uploading\VMSS520\VMSS520_F1_I1
\VMSS520_F1_I1.txt
Import Item Type: Object
Display images will be generated.
Title pages using tab delimited field mapped to the collection field Title.
There are no transcripts.
```

`< Back` `Finish` `Cancel`

Click "**Finish**."

- Screen 6 - **Summary**. This screen tells you how many "monographs" you've loaded and how many pages are in it. Its seems a bit unnecessary and all you need to do is click "Close." It should look something like this and will vary with each compound object you load:

Added monograph containing 2 pages.

`Close`
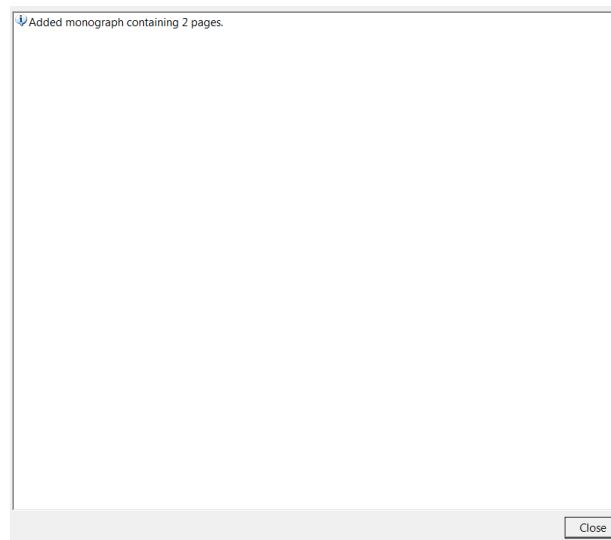
- Screen 7 - **Add Multiple Compound Objects**. Now you are back where you started but you should see the compound object in the queue of this screen. From here click "Finish" to upload the compound object to your Project Client.

You will see an intermediary window that will show the progress of the upload and it will quickly disappear. I couldn't get a screenshot of it. But after it disappears you will get another "Summary" screen, just click "Close" at this point.

ⓘ Added 1 of 1 compound objects
ⓘ Added Monograph titled Philippus Vercellensis document for Margherita Homodeo Sfondrati

- Now you will see your compound object (along with a thumbnail image of the first page of your compound object) in your Project Client.

- From here you need to upload the compound object from the Project Client to CONTENTdm. To do so, click "Select All" and you will see a check mark next to your compound object. After that click "Upload for Approval."

- The compound object will disappear from the queue. At the bottom of the Project Client you should see the "Upload Manager" and if you open that section you will see your compound object and its progress on being uploaded to CONTENTdm.

Watch the progress of the upload; it's important that your computer not go to sleep while Project Client is still uploading. If it is a large object that may take a while, adjust your Mac's settings to never sleep! Sometimes it's helpful to leave a sticky note on the computer to let other employees know what that computer is busy doing.

- ## If it finishes the uploading process without issues, CONGRATS!🎉 You've officially uploaded the item to CONTENTdm! 🙌

- If the upload stalls, there is probably a glitch in the uploading spreadsheet. Look it over to see if any filenames are wrong. Refer to the "Reviewing the Spreadsheet if necessary" section below. If you can't figure it out, ask supervisor to see if s/he can find other problems.

Approving and Indexing Uploaded Objects

...This is the easiest part 🙏

Items that were successfully uploaded must still be APPROVED and then INDEXED before it will be visible in CONTENTdm and ready for OnlineQA. These two tasks are done in the CONTENTdm Admin site:

Toggle the "Current Collection" to whatever collection this item belongs to and hit "Change."

- Next click on the purple-ish-blue "items" tab. This will give you a few options, click the first option "approve" in the purple-ish-blue toolbar.

- This will open the "Approve items" screen which will give you some options for approving the items you have uploaded.

- In this example there are some terms in the .txt metadata file you uploaded that are not in the "Controlled vocabulary." You just need to "add all". After you click "add all" those

terms should disappear and there shouldn't be anything in the "Controlled vocabulary" section of the Approve items section.

- Now you should be able to approve the compound object you loaded. In the "Reviewing 1 of 1 pending item(s)" area, to the right of the "select:" area click "all 1" and then click the "approve" button either above or below the compound object you just selected.

- As it approves the compound object, you could see a few screens. In the example here I only saw one particular screen so there is only one screenshot for it. This is typically what you will see until CONTENTdm finishes approving the item:
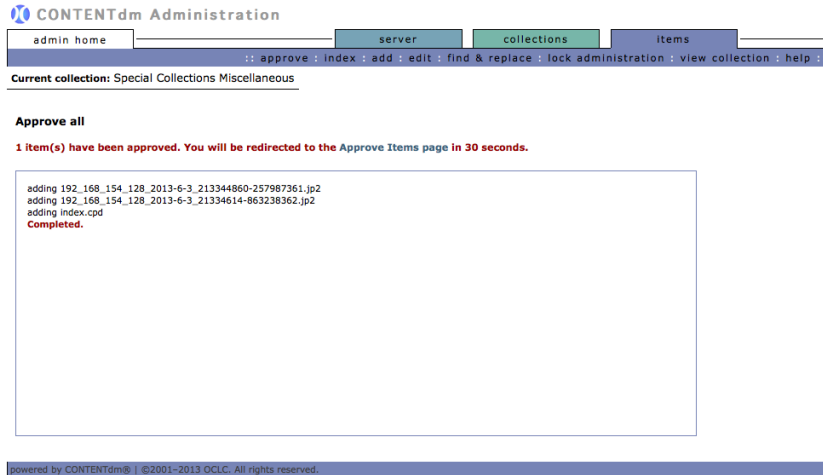
When CONTENTdm finishes approving your compound object the approval screen will look like this:
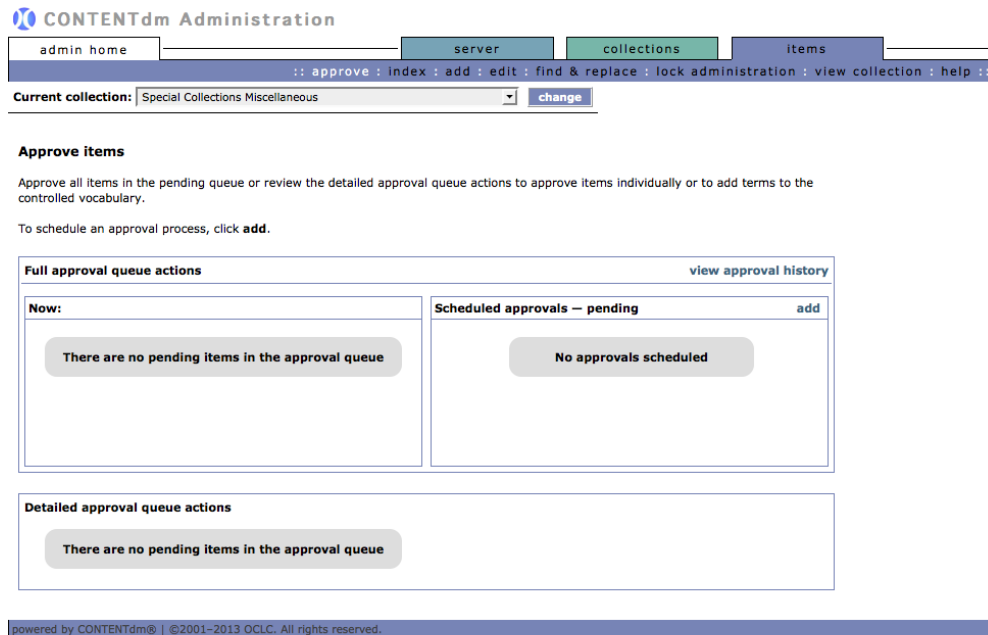
- So now you need to INDEX the collection before your compound object finally appear online. To do so click on the "Index" option on the purple-ish-blue toolbar from the approval screen and it will open the INDEX screen.

- There are a few options available to **INDEXING** a collection. You can schedule an index or you can index immediately. Unless you are instructed otherwise you should use the "**Index now**" option. There is also an "Index history"—you don't need to worry much about this section. If you do happen to see some sort of error or "failed" message or something out the ordinary in this section please notify your supervisor.

At this point you need to click "**index now**."

The index screen will turn yellow indicating that it is in the middle of indexing the collection. You can't do anything to the collection while it is in the middle of an index, which includes: adding, editing, approving, or indexing items to the collection.

When the **index** is finished the screen will look much like it did when you first opened this screen, but under the "Index status" you should see that the "Last index successful" with a date and timestamp in the current date and time as when it finished.

- After the collection has indexed you should be able to search CONTENTdm and view it in the database. From the **Index** screen, select the "edit" option from the purple-ish-blue toolbar.

From here you should click on the "Selected fields" option to the right of the "Search:" section.

Back in the Finder window where the compound object is located you will copy the filename of the folder of the compound object and past it into the first search field in the "edit" screen in CONTENTdm Admin site.

After you paste the compound object identifier in the search field you will change the field to the right of the search box to "Identifier."

Click "Search." You should see your compound object in the search results. You can right click on the thumbnail of the image for the object and open it in a new tab.

At this point you just need to make sure that the load worked technically. Later another student will conduct the "post-load" QA and the project will follow normal procedures from there.

- As long as you know the load worked, you can move the compound object to the appropriate folder and the post-load QA and other processes will continue.
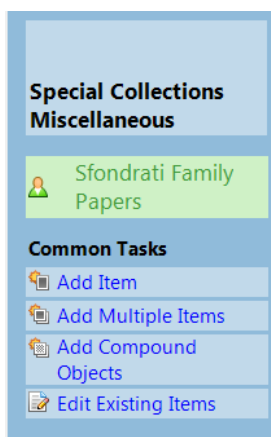
1. Loading multiple compound objects

This uploading option is a time saver! 🕑

- You need to know where the folder for the compound objects you are loading is located. It should be in the "06_Uploading" folder in the project folder for the project you're working on, in this instance "VMSS520." There should be folders for each compound object and inside those folders you should have the .txt file of the metadata for the compound object and a folder called "Scans" that contains the actual images you are uploading.
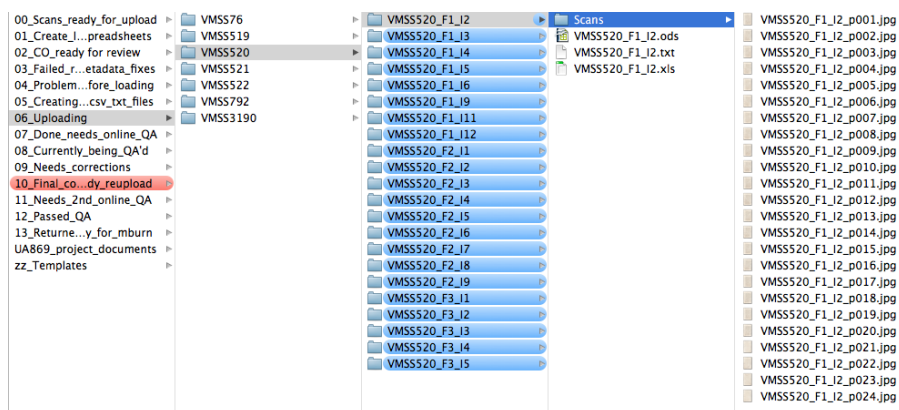
- In the left-side bar under "Common Tasks" click "Add Compound Objects."

- This opens a window that says "Add Multiple Compound Objects" which is misleading. Use the drop-down menu called "Add using" to select the "**Directory Structure**" which is at the top of this list and should already be selected and click the "**Add**" button to the right of it.

- Screen 1 - **Directory Structure - Choose type**. This section is asking 1) *What type of compound object would you like to create?* and 2) where is the *import directory that contains subfolders for each compound object*. Use the following settings and click "Next":

    1) *What type of compound object would you like to create?* - you will invariably select the radio button for "Monograph." Select this option unless otherwise directed.

    2) *Import directory that contains subfolders for each compound object* - You will use the "Browse" button to the right of the "Directory name:" box for the file path to the directory that contains the subfolders of each compound object you are uploading.
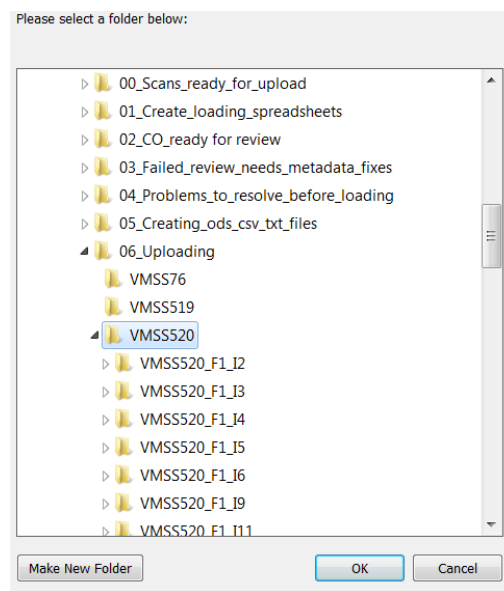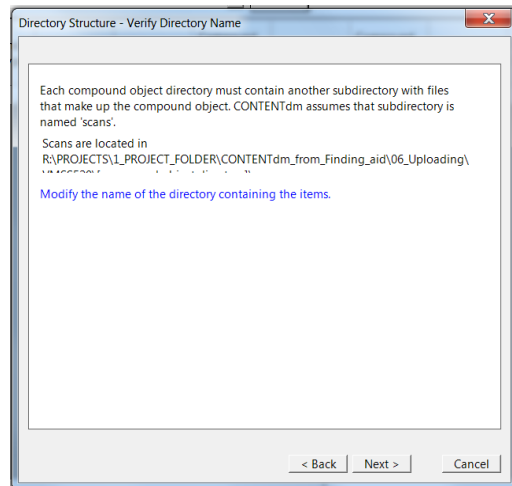

    After selecting the directory click "OK." Screen 1 - **Directory Structure - Choose type** should look something like this before clicking "Next."

- Screen 2 - **Directory Structure - Verify Directory Name**. This section is just a confirmation that you selected the correct directory of subfolders you want to upload. Click "Next."

- Screen 3 - **Directory Structure - Display Image Settings**. At this screen you are telling the Project Client 1) Under the *Do you want CONTENTdm to generate . . .* section, "YES" and 2) Under *Image Options* button, uncheck the "Lossy compression."

  1) *Do you want CONTENTdm to generate . . .* - in this section you need to Click the radio button for "YES."

  2) *Image Options* - Click the button "Image Options" in the lower left corner. This opens a window called "Project Settings Manager - Sfondrati Family Papers." Under the "File type:" section uncheck the "Lossy compression" check-box and click "OK." It should look like this:

Once back at Screen 3 - **Directory Structure - Display Image Settings**
click "Next."

- Screen 4 - **Directory Structure - Page Information**. At this screen you are telling the Project Client 1) Under the Specify page names section, "Label pages using tab-delimited text file" and 2) Under the Transcript section, "No transcripts."

Specify page names and Transcript section should look like this:

And now click "Next."

- Screen 5 - **Directory Structure - Confirm settings**. This screen is just a summary of all the settings you chose in the previous screens. It should look something like this and will vary with each compound object you load:
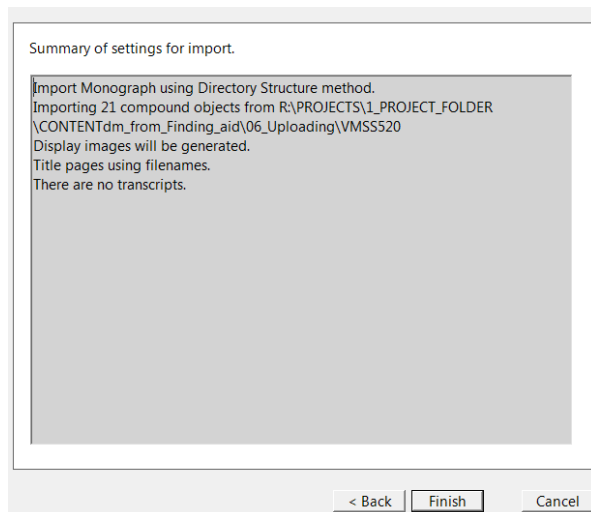
Click "**Finish**."

- Screen 6 - **Summary**. This screen tells you how many "monographs" you've loaded and how many pages are in it. Its seems a bit unnecessary and all you need to do is click "Close." It should look something like this and will vary with each compound object you load:
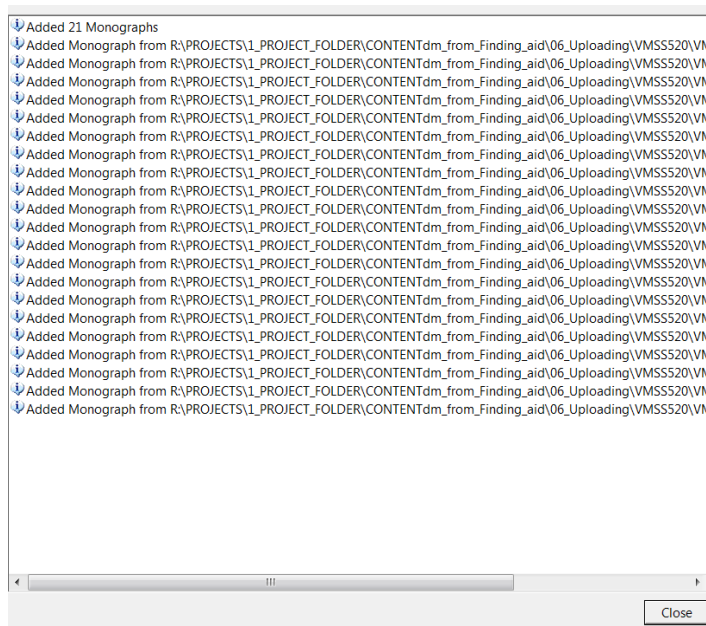
- Screen 7 - **Add Multiple Compound Objects**. Now you are back where you started but you should see the compound object in the queue of this screen. From here click "Finish" to upload the compound objects to your Project Client.

Sometimes if you are loading a really large batch (or if the compound objects themselves contain lots of image files) this screen will take some time to load and it looks like nothing is happening in your Project Client. If this happens ask your supervisor to come look at it.

After clicking "Finish" a new window will open in front of the current one and it will give you a progress bar of the compound objects loading to your Project Client.
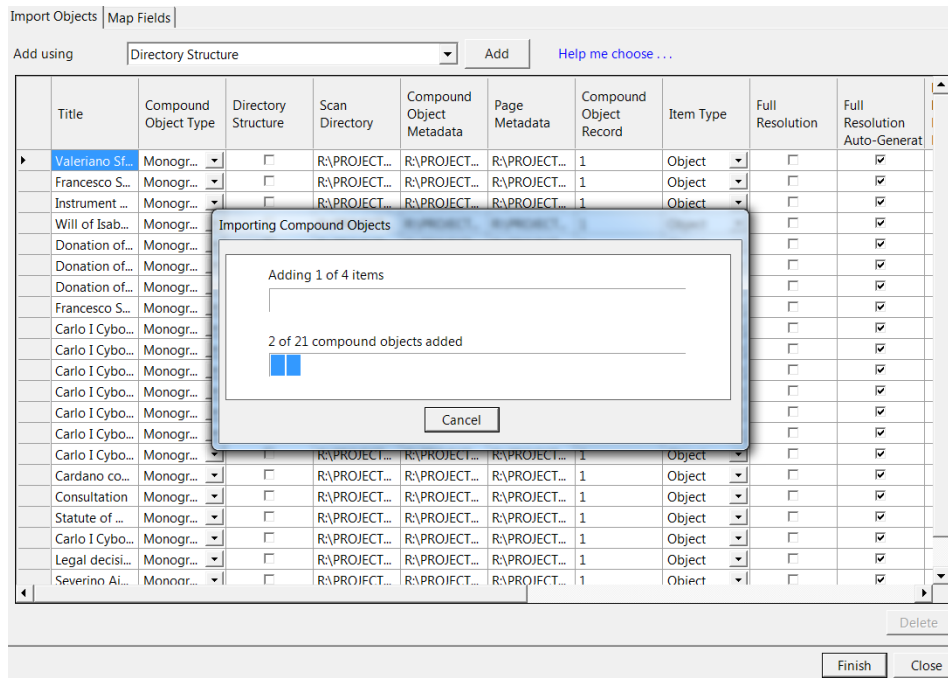
- Screen 8 - **Summary**. This is another window summarizing the titles of the monographs you uploaded to the Project Client-- just click "Close."
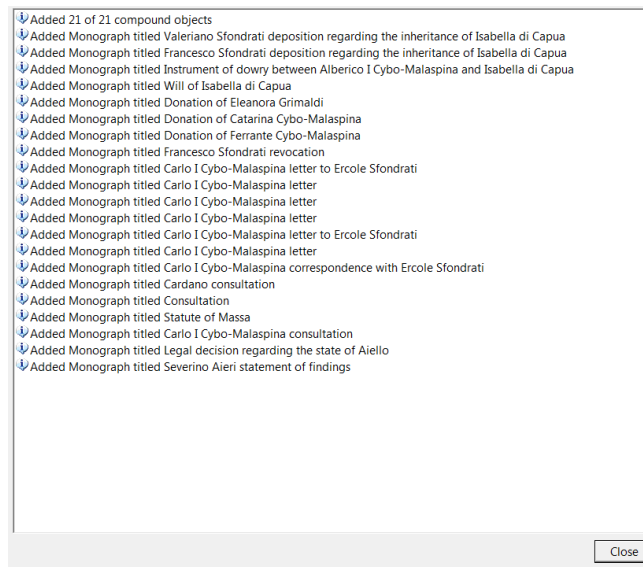
- Now you will see your compound objects (along with a thumbnail image of the first page of your compound objects) in your Project Client.

- From here you need to upload the compound object from the Project Client to CONTENTdm. To do so click "Select All" and you will see a check mark next to your compound objects. After that click "Upload for Approval."

- The compound objects will disappear from the queue. At the bottom of the Project Client you should see the "Upload Manager" and if you open that section you will see your compound objects and its progress on being uploaded to CONTENTdm.

After all the compound objects in your batch upload to CONTENTdm you will go through the same APPROVAL and INDEX steps described in section E.iv.14-26 of this write-up.

Reviewing the Spreadsheet if necessary

If the load failed, it was probably because of a stray character or some incorrect information in the loading spreadsheet. Review the descriptive information you copied from the finding aid to verify that you copied the correct things and that the images you pointed to match the correct physical item.

    A. Once you've verified the description, review the auto-filled fields and the page-level metadata.

    B. If you find mistakes, fix them.

    C. Once you've fixed it, save the spreadsheet. After saving it, open it in Open Office to save it in .ods and then a second file as .csv, which you will convert to .txt by changing the end of the filename from .csv to .txt.

    D. After all the loading spreadsheets have been reviewed, verified, and converted ultimately to a .txt, you are ready to load the items to the Project Client.

    E. After loading the set to the Project Client, upload the set from the Project Client to CONTENTdm for approval and indexing.

- Reviewing the descriptive metadata:
  - The purpose of this review is to make sure that:
    - You copied the correct description to the correct compound object spreadsheet.
    - You altered all the fields that require manual alteration.
  - Using VMSS520, folder 1, item 1, this review starts with field B and ends with field AI (CDM_LVL_Name to Call Number).
  - Have the finding aid open for the item you are working with (in this example for VMSS520, folder 1, item 1).
  - The title for the finding aid must match fields B and E. For example:

Spreadsheet:

Finding aid:

  - Check the dates in your spreadsheet against the finding aid (fields H and I).

Spreadsheet:

Finding aid:

Home / Vault MSS 520 / Item 1 folder 1 / Philippus Vercellensis document for Margherita Homodeo Sfondrati

Philippus Vercellensis document for Margherita Homodeo Sfondrati

Purchase a Digital Copy

Dates: 1501 May 15

- **Extent:** 1 sheet : vellum ; 18 x 28 cm
- **Call Number:** Vault MSS 520 Item 1 folder 1
- **Repository:** L. Tom Perry Special Collections; 20th Century Western & Mormon Manuscripts: 1130 Harold B. Lee Library: Brigham Young University: Provo, Utah

○ Check fields L, N, O, and P to make sure you manually separated the individual elements in the physical description (field L) into their respective fields.

Incorrect example-

Correct example-

○ Check the language field (field AA) to make sure the three correct language codes were used. Check the ISO 639.2 website:

- ○ Check the general notes field (field AD) to see if the student remembered to copy over any content in the "Note" section of the finding aid.

  Spreadsheet:

  Finding aid:

- ○ Check the SIRSI ID field (field AH) against the loading template for the project you are working on to see if you copied the corrected SIRSI ID into this field. There is a unique SIRSI ID for each collection. If a project consists of one collection the SIRSI ID will be the same for every compound object in the project. If, like the *Sfondrati* project, the project consists of 10 separate (but related) collections, each collection will have its own SIRSI ID. You must refer to the loading template for the collection you are working with to ensure you have the correct SIRSI ID for the compound object you are working with.

- ○ Lastly you need to make sure that the correct images were organized in this compound object. This is a question of whether or not the content of the images matches the description of the content in the finding aid. This will reveal any errors students made in scanning the wrong item, naming the files wrong, or copying the wrong files into the "Scans" folder for the compound object. For instance when scanning a photograph that is described as photos of the folk dance group at BYU, the content of the files should clearly be folk dancers. In the example of the *Sfondrati* papers, content clues should be in checking the date used in the finding aid under "Date Original" against a date written on the paper. After you know the descriptive fields in your spreadsheet are correct you can use the spreadsheet to verify the content against the content of the images.

  *For example, using the **Date Original** field in the spreadsheet—*

—you should find that date actually written in the image of the original document:
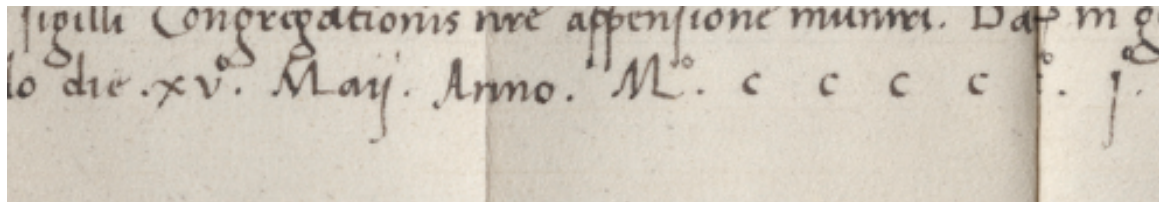
*For Sfondrati (since it is in old Italian, Spanish, and Latin) we are using the **Date Original** as the "content" verification check.*

- Review of autofilled fields (roughly fields AK-BL) and page level metadata.

    - Most of the content from AK-BL is copied down for each row of an image you are loading. There are some exceptions. This review's purpose is to call to mind the fields that are the exceptions that a student may reasonably miss or skip over.

    - Again if you compare the fields briefly to the project loading template you should see visually any problems or anomalies.

    - Here are some fields that you should specifically review:

        - Refresh date (field AS) - Within a month this field shouldn't be a problem. Students may forget to change the month when the month changes temporally. Remember it should be two years from the year you are reviewing the spreadsheet.

        - Digitization Specifications (field AV) - You must check the project database to see which scanner was used to scan the images in this compound object. Typically it will be the same scanner for every image in the compound object, but occasionally one item is scanned on a different scanner than the other items in the compound object. Each row in this field must represent the scanner the item was scanned on. You must verify that this field is correct for each image (if there are any exceptions).

        - Date Digital (field AW) - Within a month this field shouldn't be a problem. Students may forget to change the month when the month changes temporally. This should be the same year and month that you are reviewing the spreadsheet.

- Contributor Metadata Entry (field BD) - This should be the name of the person who created the loading spreadsheet.

  Incorrect example- (Ezra Han created this spreadsheet)

  Correct example-

- Metadata Entry Date (field BE) - Within a month this field shouldn't be a problem. Students may forget to change the month when the month changes temporally. This should be the same year and month that you are reviewing the spreadsheet.

- Identifier (field BG)

  - At the compound object level this should be the name of the folder of the compound object you are creating. Again if everything was named correctly and the project to this point was organized correctly than this is the core name of the filenames you are loading.

    Folder of compound object in Finder window-
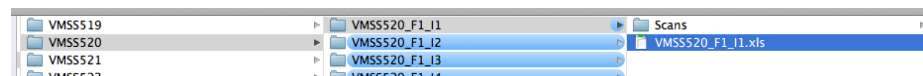
    Representation in the spreadsheet-

- At the page level this should just be a row with the name of the file you are loading in the order they exist in the "Scans" folder of your compound object.

Folder of compound object in Finder window-

Representation in the spreadsheet-

- Filename (BL) - for both the compound object and page level follow the instructions above (B.c.vii). It should end up looking like this example:

- Review the page level metadata across the spreadsheet.
  - In the field, CDM_LVL (field A), there should be a 1 for each row you loading.

- The field CDM_LVL_Name (field B) at the page level designates the outer-most level of the structural metadata. This is typically the lowest level the collection was described at. For this example it is Folder 1 item 1.

- The field Title (field E) at the page level designates the inner level of the structural metadata. For text projects this is typically Page 1, Page 2, Page 3, etc. For a photograph project it would be Image 1, Image 2, Image 3 etc.

- For fields A-E the spreadsheet should look something like this:

A	B	C	D	E	
CDM_LVL	CDM_LVL_Name	Creator	Contributors	Title	Alter
	Philippus Vercellensis document for Margherita Homodeo Sfondrati			Philippus Vercellensis document for Margherita Homodeo Sfondrati	
0					
1	Folder 1 item 1			Page 1	
1	Folder 1 item 1			Page 2	

- Fields AK-BF should be the same content for each image you are loading (noting any exceptions described in section B of this write-up).

AK	AL	AM	AN	AO	AP	AQ	AR	AS	AT	AU	AV	AW	AX	AY	AZ
Copyright Status Rights Management		Rights Holder Contact Address of Rights Holds Contact Phone of Rights Holds Contact E-Mail of Rights Holds Access Level Publisher (Digital)						Refresh Date	File Type	Format	Digitization Specifications	Date Digital	Height	Width	Checksum Checksum Method
Public domain	http://vault.lib.byu.edu/sc_copyright.html	Brigham Your ATTN: Supervisor of Reference Se 801-422-3175			specialcollections@byu.edu	Public	L. Tom Perry Special Collections, Harold B. Lee Library, Brigham Young Unive 2015-05		Text	text/jpg		2013-05			
Public domain	http://vault.lib.byu.edu/sc_copyright.html	Brigham Your ATTN: Supervisor of Reference Se 801-422-3175			specialcollections@byu.edu	Public				text/jpg	Epson Expression 10000 xl; Silverfast v.8.0.1r20; attributes: jpg, 200 dpi	2013-05			SHA1
Public domain	http://vault.lib.byu.edu/sc_copyright.html	Brigham Your ATTN: Supervisor of Reference Se 801-422-3175			specialcollections@byu.edu	Public				text/jpg	Epson Expression 10000 xl; Silverfast v.8.0.1r20; attributes: jpg, 200 dpi	2013-05			SHA1

5. As a final check you need to make sure there is no content after the last row you have a filename for in fields "Identifier" and "Filename." To do this, select the last row that there is a filename for and slowly scroll to the left to make sure all the fields above that row have been auto-filled appropriately and there is no content below that row.

Identifier	File Size	Media Type	User name	LIStag	Filename
VMSS520_F1_I1				byucompounddocument	VMSS520_F1_I1
VMSS520_F1_I1_p001.jpg					VMSS520_F1_I1_p001.jpg
VMSS520_F1_I1_p002.jpg					VMSS520_F1_I1_p002.jpg

Date Digital	Height	Width	Checksum	Checksum Method	Color Space	System Requirements	Contributor Metadata Entr	Metadata Entry Date	Metadata Entry Tool	Identifier
2013-05						Web browser. Adobe Acrobat reader.	Han, Ezra	2013-05	CONTENTdm Project Client, version 6.1.2.991	VMSS520_F1_I1
2013-05				SHA1						VMSS520_F1_I1_p001.jpg
2013-05				SHA1						VMSS520_F1_I1_p002.jpg

Contact E-Mail of Rights Holde	Access Level	Publisher (Digital)	Refresh Date	File Type	Format	Digitization Specifications	Date Digital	He
specialcollections@byu.edu	Public	L. Tom Perry Special Collections, Harold B. Lee Library, Brigham Young Unive	2015-05	Text	text/jpg		2013-05	
specialcollections@byu.edu	Public				text/jpg	Epson Expression 10000 xl; Silverfast v.8.0.1r20; attributes: jpg, 200 dpi	2013-05	
specialcollections@byu.edu	Public				text/jpg	Epson Expression 10000 xl; Silverfast v.8.0.1r20; attributes: jpg, 200 dpi	2013-05	

Link to Finding Aid	Source	SIRSI ID	Call Number	Full Text	Copyright Statu	Rights Management		Rights Holder	Contact Address of Rights Holde	Contact Phone of Rights Holde	Contact
http://findingaid.lib.byu.edu/viewItem/Vault%20MSS%20520/Item%201/folder%201	Philippus Vercellensis document for Margherita Homodeo Sfondrati; Vault MSS 520; Sfondrati family papers; L. Tom Perry Special Collections; 20th Century Western & Mormon Manuscripts; 1130 Harold B. Lee Library; Brigham Young University; Provo, Utah 84602; http://sc.lib.byu.edu/	DBP2248	Vault MSS 520 Item 1 folder 1		Public domain	http://vault.lib.byu.edu/sc_copyright.html		Brigham Youn	ATTN: Supervisor of Reference Se	801-422-3175	specialc
					Public domain	http://vault.lib.byu.edu/sc_copyright.html		Brigham Youn	ATTN: Supervisor of Reference Se	801-422-3175	specialc
					Public domain	http://vault.lib.byu.edu/sc_copyright.html		Brigham Youn	ATTN: Supervisor of Reference Se	801-422-3175	specialc

Names	Topics	Geographic Place Names	Genre	Occupations	Functions	Subject	Language	Audience	Condition	General Notes	Collection	Link
			Certificates				Latin; lat; la			Manuscript.	Sfondrati family papers	http:0MS

	G	H	I	J	K	L	M	N	O	P	Q	R	S
	Description	Date Original	Date Span	Edition	Publisher (Original)	Physical Description	Scale	Extent	Medium	Dimensions	Arrangement	Degree/Dissertation Note	Contributing Institution
		1501 May 15		1501	Electronic version	1 sheet : vellum ; 18 x 28 cm			vellum	18 x 28 cm			L. Tom Perry Special Collecti... Harold B. Lee Library, Brigha... Young University

	A	B	C	D	E	F	G	H
	CDM_LVL	CDM_LVL_Name	Creator	Contributors	Title	Alternative Title	Description	Date O...
		Philippus Vercellensis document for Margherita Homodeo Sfondrati			Philippus Vercellensis document for Margherita Homodeo Sfondrati			1501 M 15
0								
1		Folder 1 item 1			Page 1			
1		Folder 1 item 1			Page 2			

- Failed review needs metadata fixes

  - This folder is for compound objects that failed the review and student who created the spreadsheet originally should fix the problems identified in the spreadsheet.

  - As the reviewer, when you find fields that were not copied correctly or manually edited appropriately, or find problems in the page level metadata, highlight those fields in gray for the student who must fix the spreadsheet to identify the problem fields.

  - In creating this write-up, I reviewed a compound object from the *Sfondrati Family Papers*, VMSS520_F1_I1. I found errors in the following fields:

M	N	O	
Scale	Extent	Medium	D
		vellum	1

BD	
Contributor Metadata Entr	M
r. Snyder, Marisa	20

  - Since the compound object VMSS520_F1_I1 needs metadata fixes, I placed the folder for the compound object in the "03_Failed_review_needs_metadata_fixes" folder.
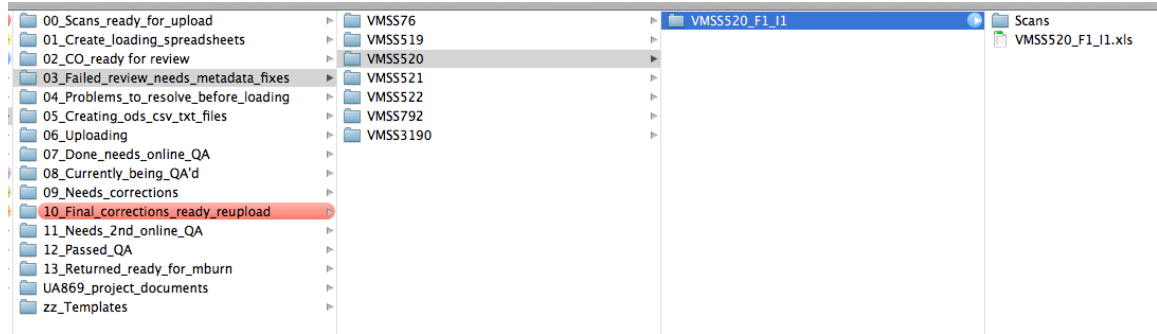
- ○ The student who created the spreadsheet originally will go in and look for the gray fields. Once those are fixed, then the .ods, .csv, and .txt files can be created and subsequently loaded.

Review spreadsheet

Common things to watch out for, that might make Project Client reject a spreadsheet:
- Column A, CDM_LVL should have a 0 in the Compound Object level (the first row) and a 1 for all the Item level rows (aka every other row belonging to that compound object).
- Column B, CDM_LCL_Name should have the title in the Compound Object level, the Call Number in every row with a jpg, and "Printing Version" written in the last row, the pdf/printing version row (if there IS a printing version).
- Column AA, Language, must have list the language 3 times according to the Library of Congress code. The full name of the language, the ISO 639-2 Code, then the ISO 639-1 Code, if extant. A semi-colon and a space much separate each of the three parts. Example: **English; eng; en**
- The date columns, AS, AW, and BE, must be in YYYY-MM format.
- Column AT should only have writing in the Compound Object level row.
- Column AU should have writing in every row.
- Column AV should have writing in ONLY the Item level rows, NOT the c.o. level row.
- Column BA should also only have SHA1 written in the Item level rows, nothing in the c.o. level.
- Column BC should only have writing in the c.o. level.
- Column BG should have the callnumber (no spaces) in the c.o. level row, and the jpg names in all of the item level rows. Same goes for the BL column, although if something is wrong, delete BL2.
- Make sure the printing version entries adhere to what the printing version should say.
- When the spreadsheet looks good but still won't load, make sure there are no errant space in any supposed-to-be-blank cells, and make sure there are no errant spaces at the ends of the entries in cells that are filled.
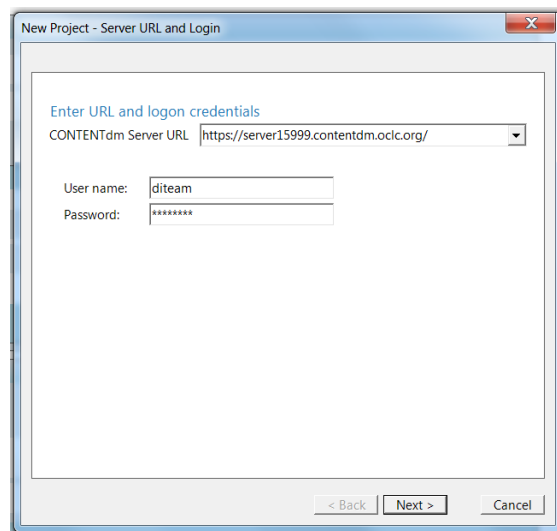
*Creating a project in Project Client

This step describes how to create a "project" in the Project Client. Typically each computer-- each copy of Project Client-- needs a "project" for each collection you are loading into CONTENTdm. If you use the same computer, that "project" will be saved (and all its settings) on that instance of the Project Client. If you use a different computer you will need to follow the same steps and create the "project" on that computer.

- Once the Project Client is open go to under "Project" to "New."
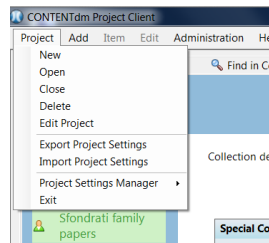
- Screen 1 - New Project - Server URL and Login - is asking you to select the server our content resides on and to enter the Username and Password. We used to have a test server (which we no longer have) so there should only be one option to select for the CONTENTdm Server URL.

- ○ Screen 2 - New Project - Choose Collection - this is a drop-down menu of all the collections we have set-up in the CONTENTdm Admin site for loading content into. You need to know the name of the collection (as it was created in the CONTENTdm Admin site) in order to select the correct collection.
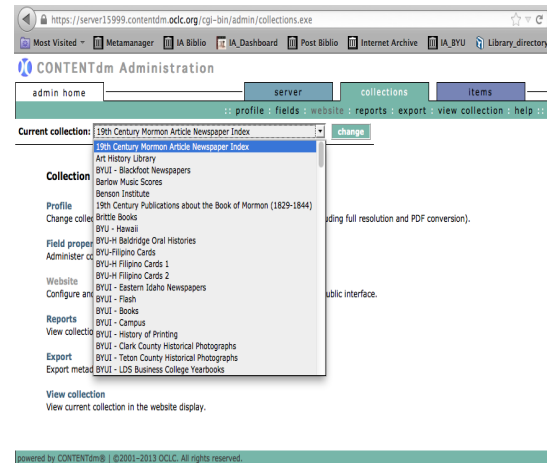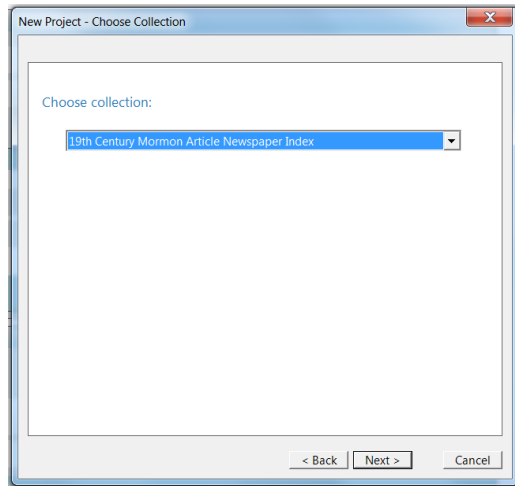
- Screen 2 - New Project - Choose Collection - Check with your supervisor, but often, unless otherwise specified, any new finding aid project will be loaded into one of the CONTENTdm collections called "Special Collections Miscellaneous #_." Use the highest Miscellaneous number, it will be the most recent. (We are currently on Miscellaneous 4. We have filled up Miscellaneous 1, 2, and 3). For the purposes of this write-up I am using the *Sfondrati Family Papers* project as my example.
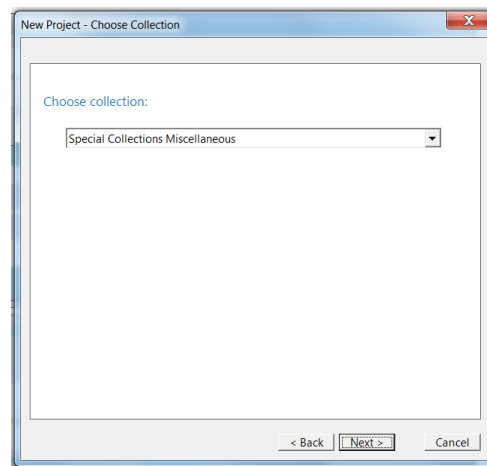
- Screen 3 - New Project - Name and Share Project - at this screen you are giving your "project" in the Project Client a name that you readily recognize and know which CONTENTdm collection it is mapped to. It should be fairly obvious what the "project" name should be. For this example I will name it *Sfondrati Family Papers* and then click "Finish."

SETTING UP THE METADATA TEMPLATE FOR YOUR NEW PROJECT.

This step describes how to set up your metadata template. There is a metadata template for every project. Each time you create a new "project," you must set up the metadata template. Once you set the metadata template up you don't need to do it again for that project.

- In the left-side bar under "Other Tasks" click on "Edit Metadata Template."
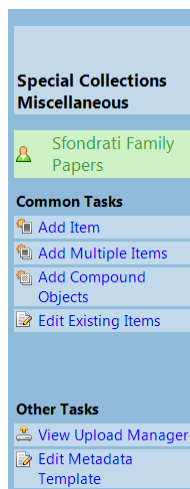
- You will ONLY EDIT the "Metadata Templates" for the following file type templates: All image templates (JPEG, JPEG2000, TIF) and PDF.

- ○ **EDITING THE "Images Template."** Click on the "Edit" button to the right of the "Images Template." This will open a table of the fields in your collection. The template is a place to tell the Project Client to do one of three things: a) whether to populate the field using the "Text" or content in your metadata .txt file, b) to automatically generate the content for that field, or c) to enter in defaulted content that will be used in every instance of compound objects that you load.

    In the "Images Template" you will use option "b) automatically generate the content" to auto-populate the content of the following technical fields: *Height, Width, Checksum, Color space, File Size, and User name*. In order to set those fields to "auto-   populate" select the drop-down menu for those fields under "Default Type" and match the name of the field to the same name in the drop-down menu and the click "OK."

    - ● **EDITING THE "JPEG (.jpg) template."**

        In the "JPEG (.jpg) Template" you will use option "b) automatically generate the content" to auto-populate the content of the following technical fields: *Height, Width, Checksum, Color space, File Size, and User name*. In order to set those fields to "auto-populate" select the

drop-down menu for those fields under "Default Type" and match the name of the field to the same name in the drop-down menu and the click "OK."

Field Name	Default Type	
Contact Add...	Text	
Contact Pho...	Text	
Contact E-M...	Text	
Access Level	Text	
Publisher (Di...	Text	
Refresh Date	Text	
File Type	Text	
Format	Text	
Conversion S...	Text	
Date Digital	Text	
Height	Height	
Width	Width	
Checksum	Checksu...	
Checksum M...	Text	
Color Space	Colorsp...	
System Requ...	Text	
Contributor ...	Text	
Metadata En...	Text	
Metadata En...	Text	
Identifier	Text	
File Size	File Size	
Media type	Text	
User name	Userna...	
LIStag	Text	

- **EDITING THE "JPEG2000 (.jp2) template."**

In the "JPEG2000 (.jp2) Template" you will use option "b) automatically generate the content" to auto-populate the content of the following technical fields: *Height, Width, Checksum, Color space, File Size, and User name*. In order to set those fields to "auto-populate" select the drop-down menu for those fields under "Default Type" and match the name of the field to the same name in the drop-down menu and the click "OK."

Field Name	Default Type	
Contact Add...	Text	
Contact Pho...	Text	
Contact E-M...	Text	
Access Level	Text	
Publisher (Di...	Text	
Refresh Date	Text	
File Type	Text	
Format	Text	
Conversion S...	Text	
Date Digital	Text	
Height	Height	
Width	Width	
Checksum	Checksu...	
Checksum M...	Text	
Color Space	Colorsp...	
System Requ...	Text	
Contributor ...	Text	
Metadata En...	Text	
Metadata En...	Text	
Identifier	Text	
File Size	File Size	
Media type	Text	
User name	Userna...	
LIStag	Text	

- **EDITING THE "Tagged Image File (.tif) template."**

   In the "Tagged Image File (.tif) Template" you will use option "b) automatically generate the content" to auto-populate the content of the following technical fields: *Height, Width, Checksum, Color space, File Size, and User name*. In order to set those fields to "auto-populate" select the drop-down menu for those fields under "Default Type" and match the name of the field to the same name in the drop-down menu and the click "OK."

Field Name	Default Type	
Contact Add...	Text	▾
Contact Pho...	Text	▾
Contact E-M...	Text	▾
Access Level	Text	▾
Publisher (Di...	Text	▾
Refresh Date	Text	▾
File Type	Text	▾
Format	Text	▾
Conversion S...	Text	▾
Date Digital	Text	▾
Height	Height	▾
Width	Width	▾
Checksum	Checksu...	▾
Checksum M...	Text	▾
Color Space	Colorsp...	▾
System Requ...	Text	▾
Contributor ...	Text	▾
Metadata En...	Text	▾
Metadata En...	Text	▾
Identifier	Text	▾
File Size	File Size	▾
Media type	Text	▾
User name	Userna...	▾
LIStag	Text	▾

- **EDITING THE "PDF file template."**

   In the "PDF file template" you will use option "b) automatically generate the content" to auto-populate the content of the following technical fields: *Checksum, File Size, and User name*. In order to set those fields to "auto-populate" select the drop-down menu for those fields under "Default Type" and match the name of the field to the same name in the drop-down menu and the click "OK."

Field Name	Default Type
Contact E-M...	Text ▼
Access Level	Text ▼
Publisher (Di...	Text ▼
Refresh Date	Text ▼
File Type	Text ▼
Format	Text ▼
Conversion S...	Text ▼
Date Digital	Text ▼
Height	Text ▼
Width	Text ▼
Checksum	Checksu... ▼
Checksum M...	Text ▼
Color Space	Text ▼
System Requ...	Text ▼
Contributor ...	Text ▼
Metadata En...	Text ▼
Metadata En...	Text ▼
Identifier	Text ▼
File Size	File Size ▼
Media type	Text ▼
User name	Userna... ▼
LIStag	Text ▼

## FINALLY YOU CAN START LOADING YOUR COMPOUND OBJECTS!!!

👏👏👏👏👏

CONTENTdm Online QA and Wrap-up

Summary: Similarly to how we QA a cart in Internet Archive, we Online QA 30% of the compound objects in a CONTENTdm project. Online QA should occur after all scanning/uploading of items in a project/box/etc. is complete. Before beginning QA, calculate whatever 30% of the total number of compound objects is (and always round up :). Then begin selecting items at random from the CDM Tracker to QA. Also like Internet Archive, every CONTENTdm <u>patron request</u> is Online QA'd.

When the entire box/project passes Online QA, the next step is to send the final URL of each compound object in CONTENTdm to the metadata department. Metadata will connect the library website and the CDM website together.

To perform an OnlineQA of an item:

- Log in to the CONTENTdm admin website (should be bookmarked on your comp):
- Click the purple "Items" tab. Toggle the "Current collection" to whatever we're working on (Special Collections Miscellaneous 4, etc... you can find this under the "Project Details" column in the To-Do list). Hit the purple "change" button to go into that collection.
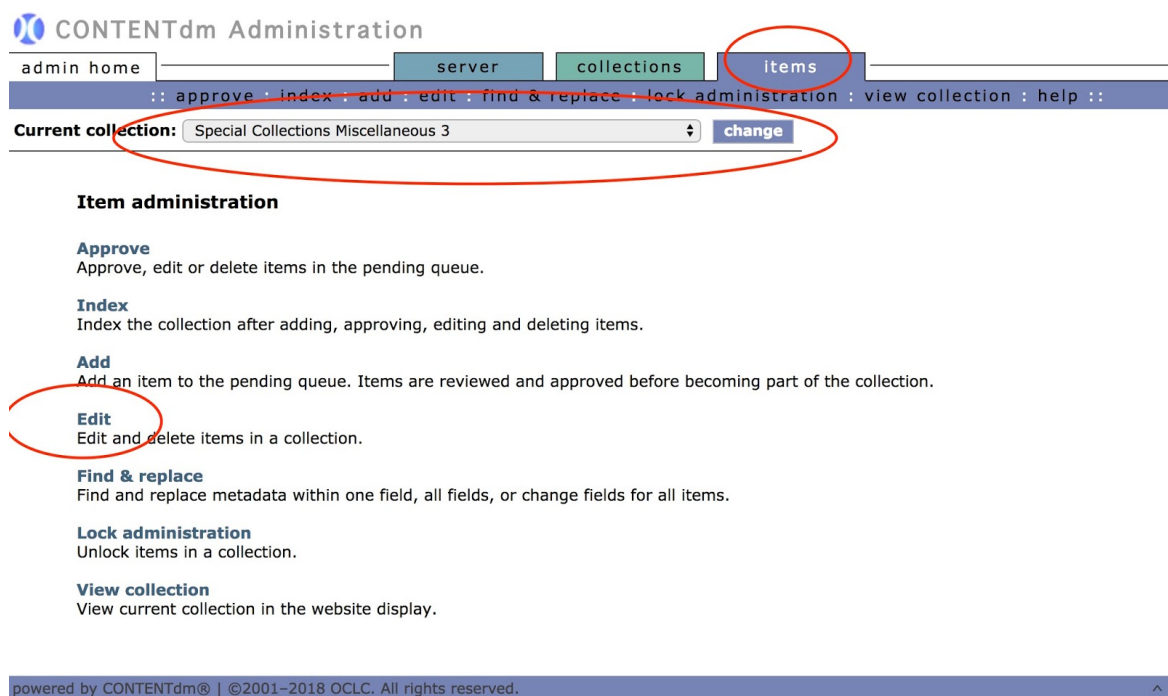
- Hit "Edit" up in the top purple bar. This brings you to a search page

- Go to our CDM Tracking sheet and copy the compound object's identifier, which should look something like: MSS1779_S9_O24_F1_I1.

- Back in the CDM Admin site, click "Selected Fields" as the way to search, then paste the identifier into the "All of the words" section. Toggle the search term to "Identifier," then hit "Search":

Edit

Browse or search for items you wish to edit, delete, export or add to compound objects.

Search: Across all fields | **Selected fields** | By proximity   **browse collectic**

Find results

| All of the words | MSS1779_S9_O24_F1_I1 | in | Identifier | field(s) show terms |
| The exact phrase | | in | Creator | field(s) show terms |

+ more fields | - fewer terms

Display 50 results per page
Sort by Title

search   clear all

- It should pull up your item like so:

Results: 1 items found

Global actions

Caution: These actions affect all results. Deletion cannot be undone.

delete all   export all   add all to compound object

Delete mode

This setting determines how compound objects are deleted.

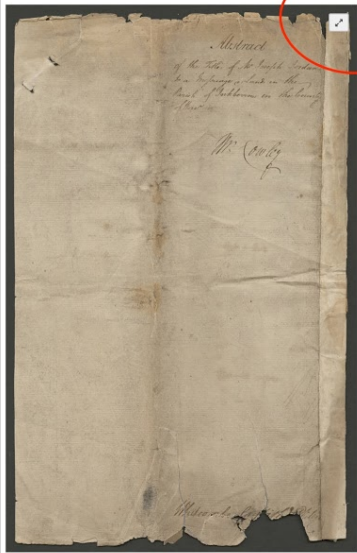○ Delete compound object only   ○ Delete compound object and its subpages

Selected operations

select all : clear all : delete : export : add to compound object

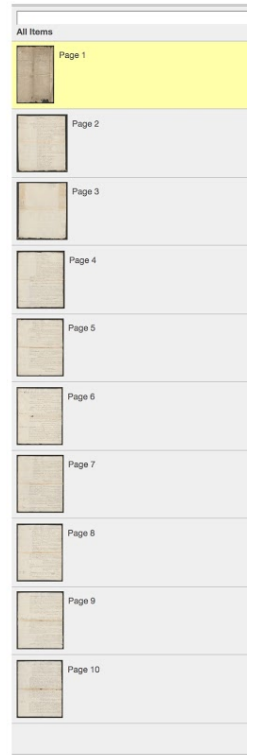| | **Image:** | ▲ **Title:** | **Subject:** |
| □ 1 | | Joseph Jordan abstract of title | |

select all : clear all : delete : export : add to compound object

- Right-click on the thumbnail and click "Open Link in New tab" to open the public-facing view of this CONTENTdm item:

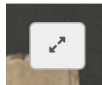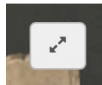You will QA a few things:

1. Click the ⤢ button (circled in red) in the corner of the pageview to enlarge the image. Inspect it for cut off text, blurriness in both the center of the page and the edges, etc. Warning: sometimes the regular view will look a bit blurry. It won't be until you actually click in and zoom that you can tell it's actually not blurry. The viewer can be a little messed up. If something looks blurry, zoom in to double-check.

2. Click the > button (circled in red, center middle of screen) to look through all the item's pages. Simultaneously flip through the physical item's pages. Compare the two, and look for the same things as always: bad crops, missing spreads, blurriness, text cut off, etc.

3. Click on the "Link to Finding Aid" found in the "Object Description" and then compare the finding aid's metadata with the object and ensure that everything looks right: the titles of online and physical item match, their dates match, etc. Look at the General Notes in the Finding Aid and

then go back to the CONTENTdm page and make sure any General Notes made it into CONTENTdm.
4. Look on the right hand side of the CONTENTdm page and make sure the pages are numbered correctly (they can just proceed 1, 2, 3, they don't have to adhere to the actual page numbers in the book like they do in Internet Archive).
5. Record all fixes need next to your name in the CDM Tracker spreadsheet, in the "Online QA" column.. Mark it as failed in the spreadsheet if there are <u>any</u> fixes needed.
6. If you are the person who will do the fixes for an item that failed Online QA, see <u>these instructions</u>.

Sending Links to Metadata

After the necessary 30% of items in a box/project passes OnlineQA, we send the public-facing URLs of all the items in that box/project to Metadata and we are then done! To "send" the URLs, we just copy and past three things (the identifier, its final URL, and today's date) into a spreadsheet simply called <u>CONTENTdm Links</u> that we share with the Metadata department.

There are two ways to retrieve the URLs of compound objects: one at a time (if you only have a few items) or by batch (if you have like a whole box).

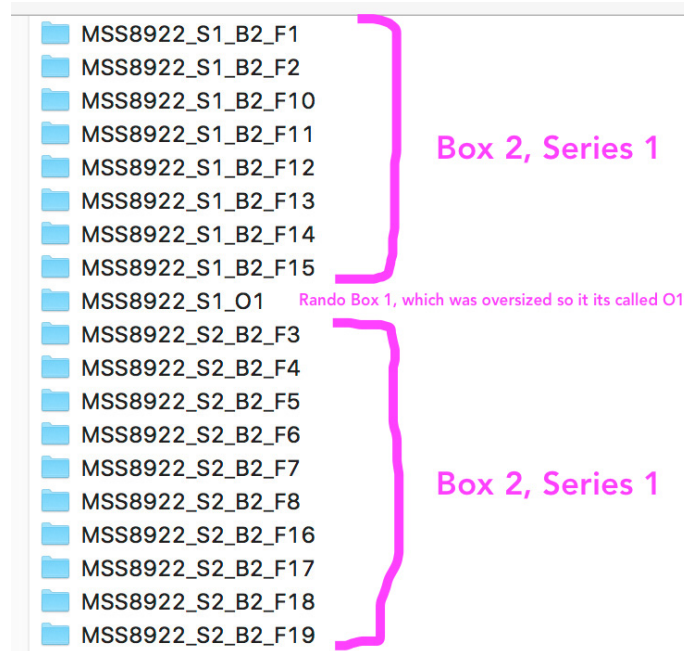**If you only have a few compound objects to send, do this:**
- First, ready the CONTENTdm Links spreadsheet by copying and pasting the identifiers of all items you're sending into the appropriate tab in that spreadsheet (check with supervisor to know which tab you're putting the links in).
- Search for each identifier in the CDM Admin page and right-click on its thumbnail when it pulls up (just like you did above when you QA'd an item). Open the front-facing public page. Make sure you are clicked into the "page 1" display online.
- Highlight the page's URL in the web browser, then copy and then paste the URL into the appropriate place in the Links spreadsheet, next to the corresponding identifier. <u>Make sure you are pasting the URL next to the correct identifier.</u>
- Type in the date that you pasted this URL.

If you have a bunch of links to gather and send to Metadata at once, do this:
Warning: this is a little work intensive and can easily be messed up.
Get ready to pay CLOSE attention to detail!!
- First, get the CONTENTdm Links spreadsheet ready by copying and pasting all the identifiers into the appropriate tab in that spreadsheet (check with supervisor to know which tab you're putting these identifiers into).
- Now is a good time to look over all the identifiers and make sure you understand what ORDER they are all listed in; if this is a collection with series and subseries numbers, the identifiers will most likely **not** be listed in the same order as they are in within the physical box.
    - Example: even though MOST of the items below are in Box 2, the box has a mix of items from Series 1 and Series 2, so the identifiers are in practically random order:

MSS8922_S1_B2_F1
MSS8922_S1_B2_F2
MSS8922_S1_B2_F10
MSS8922_S1_B2_F11
MSS8922_S1_B2_F12
MSS8922_S1_B2_F13
MSS8922_S1_B2_F14
MSS8922_S1_B2_F15   **Box 2, Series 1**
MSS8922_S1_O1   Rando Box 1, which was oversized so it its called O1
MSS8922_S2_B2_F3
MSS8922_S2_B2_F4
MSS8922_S2_B2_F5
MSS8922_S2_B2_F6
MSS8922_S2_B2_F7
MSS8922_S2_B2_F8   **Box 2, Series 1**
MSS8922_S2_B2_F16
MSS8922_S2_B2_F17
MSS8922_S2_B2_F18
MSS8922_S2_B2_F19

Rule 1: You can only gather batches of URLs for items that have almost the same call number. This is because the search in CONTENTdm Admin is so finicky. Let's talk about how to coax the right items from CDM Admin's search interface…

- Go to the Purple "Items" tab in CDM Admin. Make sure you're toggled to the right collection.
- Hit "Edit" in the top purple bar. Then in the middle of the page, choose to search by "Select Fields."
- Change the search bars to read, "The Exact Phrase" and toggle the search to be in the "Call Number" field.
    - If you have a small collection and you want links for ALL the objects in that call number, you can just search for the call number straight up, e.g. type in MSS 6288 and hit search. Double-check that the number of items that search pulls up matches the number of identifiers you expected to see.
    - If you only want URLs for a small subsection of a large collection, you're going to have to get creative. Write out whatever part of the call number (including series and subseries) that ALL of your identifiers have in common in the first search box. Because Findings are stupidly written with the item IN FRONT of the box number, do not include the box number.
    - If you have a sm
- If you only want to retrieve the URLs for a portion of a Depending on the complexity of the call numbers (especially if there is a variety of series and subseries in the box), you may have to perform the following a few times in order to retrieve all of the URLs (it will still most likely save time to do this in a batch or two instead of one at a time):
- Type in the series/subseries portion of the call number in the first box, Then, in the second box, type in the Box number. Example:

Search: Across all fields | **Selected fields** | By proximity

Find results

The exact phrase ⇕	Vault MSS 792 Series 1 Subseries 1	in Call Number ⇕	field(s) show terms
The exact phrase ⇕	Box 1	in Call Number ⇕	field(s) show terms

- Double-check the number of items that pull up for the search. Make sure the number of items that pulled up are the same as the number of items you expect. For the box pictures above, I would perform the search twice, once for "Vault MSS 792 Series 1 Subseries 1 Box 1" and again for "Vault MSS 792 Series 1 Subseries 2 Box 2" Type it all out as it displays in the actual Finding Aid website.

Rule 2:

After the link has been "sent," paste it also into our tracking spreadsheet (it has a column for final urls, too). Then enter your name and date in the "Sent Metadata" columns. After both spreadsheets have been updated, you are done sending that link!

** Note for when you are dealing with an item that failed OnlineQA and was deleted off of CONTENTdm, fixed, and reuploaded: do <u>not</u> paste the new link over top of the old link in the CONTENTdm Links spreadsheet (the metadata peeps won't notice the change). Instead, the new link should be pasted into the "Reloads" tab in the Links spreadsheet. Metadata will only look for "fixed" URLS there in the "Reloads" tab.

Loading Corrections

If, for some reason, something goes wrong in the loading process or the scans were incorrect, you may have to delete some compound objects/pages. Here's how:

1. Search for the compound object you are looking for in the Items- Edit section of the Contentdm Admin website. (e.g., VMSS519_I10)

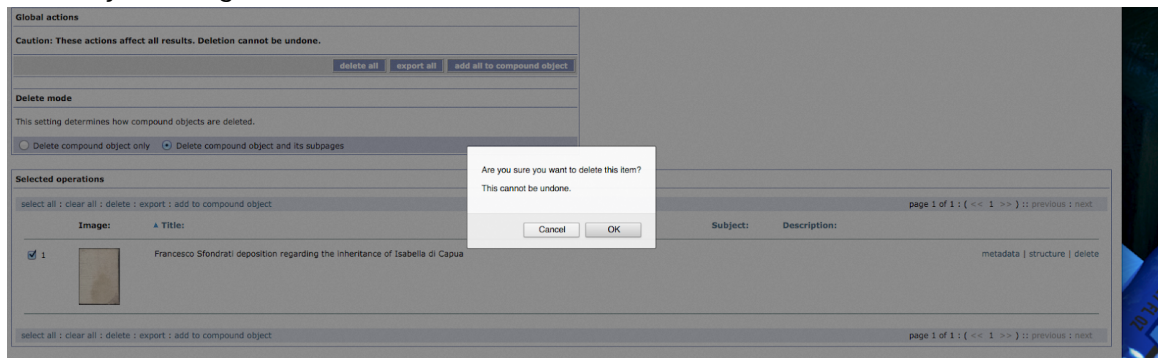2. You will see a screen that looks like this:

3. MOST IMPORTANT ASPECT OF DELETING IN CONTENTdm: In the Delete mode box, you need to select the option that says "Delete compound object and its subpages."!!!!!!! It's not automatically checked!!!!!

Remember the definition of **compound object?** The compound object is the wrapper/bag and the items/subpages are the skittles. When you delete just the "compound object only," you are only removing the wrapper. The skittles, or items, are still there (we don't want these little orphan jpegs clogging our ContentDM server). In order to delete a compound object, you need to "delete the compound object **and** its subpages."

4. Select the image at the bottom by checking its little box and click the delete link to the right of the object's image and title. You'll see a screen that looks like this:

5. After you click OK, you'll see a screen that looks like this:
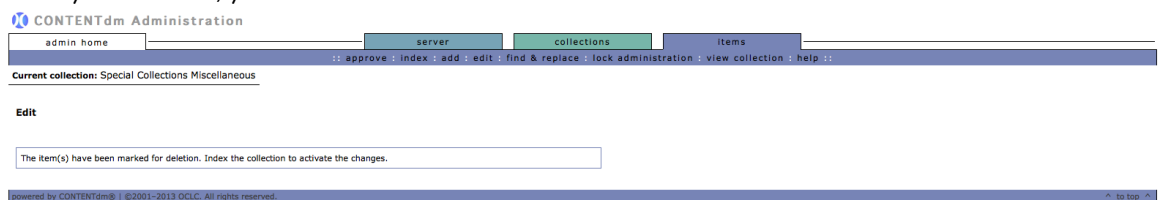
6. Reload fixed item. Approve and index the collection for all changes to be finalized.