

Before you begin

This document is written with the assumption that the computer that you are using has installed:

- Microsoft Windows® XP with SP2 or SP3, Windows Vista, Windows 7, or Windows 10.

Understand Collections and Projects within CONTENTdm:

Collections. On the server, items are contained in collections. Each collection can contain items from many projects.

Projects. In the Project Client items are processed in a project. When a project is created, a project is linked to a single collection.

Follow the steps below to download the Project Client, create a project, add items to the project, upload items to a collection on the server, and view those items with your Web browser.

Download & install Project Client

From the User Support Center:

Important: You must register before entering the USC for the first time. To register, you must have your Organization ID, which is in your CONTENTdm Welcome e-mail.

1. Go to the Downloads page for the Project Client on the CONTENTdm User Support Center, located at <https://www.oclc.org/support/services/contentdm/downloads-addons.en.html>.
2. Right-click the installation .zip file and save to your computer.
3. Unzip the file and run the executable to install the Project Client on your computer.

Download sample items

Follow these steps only if you do not have any items of your own for a project.

Download the [samples file](#) from the User Support Center. Save the files to a directory that is accessible from the Project Client. Some utilities may require you to extract the files.

Work with a project

Create a new project

1. Open the Project Client.
2. From the Project Client Home tab click **Create New Project** or select **New** from the Project menu. The New Project wizard displays.

3. Enter the CONTENTdm Server URL and your user name and password and click **Next**.

If you don't know your server URL, user name or password:

Hosted users: Check your Welcome e-mail.

Direct License users: Check with your CONTENTdm Administrator.

4. Choose the collection that you wish to upload items to. Click **Next**.
5. Name your project or use the name provided. If you want to make this project available to other Project Client users, check **Share this project on a network with other users**. This saves items and Project Client settings to the shared location you specify. Click **Finish**.

If you have questions:

Direct License users: Contact your CONTENTdm Administrators.

Hosted users: Contact CONTENTdm Support.

Add a single item

1. Navigate to the **Home** tab or **Project** tab.
2. On the left task pane under Common Tasks, click **Add item** or select **Item** from the Add menu. The Add Item wizard opens.
3. Click **Browse** to locate the file you want to add.
4. Click **Add** once you have selected your file.
5. A summary screen displays confirmation or any errors or warnings.
6. Click **Close**. The item is displayed in the project spreadsheet.

Add multiple items (a folder-full)

1. Navigate to the **Home** tab or **Project** tab.
2. On the left task pane under Common Tasks, click **Add multiple items** or select **Multiple Items** from the Add menu. The Multiple Items wizard opens.
3. Select **Import from a directory**.
4. Click **Browse** to locate the directory containing the items that you want to add. Click **OK** then click **Next**.
5. Select whether to generate display images.
6. Click **Next**. The Confirm Settings screen displays. Review the settings and click **Add Items** or click **Back** to change your settings.
7. A summary screen displays confirmation or any errors or warnings.
8. Click **Close**. The items are displayed in the project spreadsheet.

Add metadata

1. Double-click a thumbnail image in the project spreadsheet. The item opens in a new tab.
2. Type your metadata into the form.
Note: When typing multiple terms in a controlled vocabulary field, separate them with a semicolon.
3. When finished, click **Save** before closing the Item tab.

Upload items to server

1. On the Project tab, select the items you want to upload from the project by selecting the checkbox in each item row or click **Select All**.
2. Click **Upload for Approval**. Selected items are uploaded and the status bar at the bottom of the Project Client indicates progress.
3. When the upload is complete, the administrator can review the pending queue and approve the items.

Building a collection

Approve and index items within a collection

1. From the Administration menu of the Project Client, click **Approve**. If a login screen opens, enter your user name and password and click **OK**.
2. The approval queue displays. Select **Approve & Index all**, then click **go**,
3. A status message is displayed while the approval and index is in progress. When approval and indexing are complete, the status message changes to indicate there are no pending items.
4. When finished, you can close the CONTENTdm Administration page and the Project Client.

View items

Browse collections on a server

1. In your browser's address bar, go to your CONTENTdm Website URL to see your website Home page.
Hosted users: Check your Welcome e-mail.
Direct License users: Check with your CONTENTdm Administrator.
2. CONTENTdm Website Version 6.x: Click **Browse All**. Items from all collections display, sorted by title. You can change display options, reverse the sort, and sort on other fields by clicking on the field name.

CONTENTdm Responsive Website: Click the **Hamburger Menu**, then click **Browse**. Items from all collections display, sorted by the default chosen by the Administrator in the Website Configuration Tool. You can change sort options using the **Sort** menu.

3. Hovering over a thumbnail in the default view displays a Quick View to preview the metadata.
4. To view the full item and its metadata, click the thumbnail image or the image title.

User and network support

Help Files:

<https://www.oclc.org/support/services/contentdm/help.en.html>

Community Center:

<http://www.oclc.org/community/home.en.html>

Tech Support: 1-877-797-0887

Support is available 7:00 am–9:00 pm U.S. Eastern Time, Monday through Friday.

E-mail: support@oclc.org