

Guide to CONTENTdm Documentation

The latest version of this document is available at the
CONTENTdm [Support & Training website](#).

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Introduction

CONTENTdm is a powerful and feature-rich application with a correspondingly comprehensive documentation set. This document offers a roadmap to that documentation set — for new users who are just starting to build digital collections, and for experienced users who need more information about particular capabilities of the software. The document is organized into the following three sections:

- **Getting Started.** Understand CONTENTdm as a whole, and take the first steps toward building your collections.
- **Next Steps.** This section addresses three sets of tasks often encountered when moving beyond the initial phase of CONTENTdm usage: setting up and using Controlled Vocabularies, importing existing metadata, and configuring the CONTENTdm Website.
- **Specifics.** This section categorizes CONTENTdm documentation by specific aspects of digital collection building.

Please note that this Guide is not intended to be exhaustive. If you don't find what you're looking for here, please see the following resources:

- **Discussion Boards:** <https://www.oclc.org/community/contentdm/discussions.en.html>
- **Help files:** <https://www.oclc.org/support/services/contentdm/help.en.html>
- **Tutorials:** <https://www.oclc.org/support/training/portfolios/digital-collection-management/contentdm/tutorials.en.html>
- **Support FAQs:** <https://www.oclc.org/support/services/contentdm/faq.en.html>

You can use the Search tools at <https://www.oclc.org/support/services/contentdm.en.html> to search the Community Center & the entire Support & Training site.

Getting Started

Birds-eye View

CONTENTdm & Digital Collection Gateway Overview

http://www.oclc.org/content/support/worldwide/en_us/services/contentdm.html#overview

This bimonthly webinar is highly recommended for all new CONTENTdm users. Attend a live session and ask questions, or just watch the recording and review the slides. About 90 minutes.

Online instruction

[CONTENTdm Basic Skills 1 - Getting Started with CONTENTdm](#)

[CONTENTdm Basic Skills 2 - Working with Text in CONTENTdm](#)

[CONTENTdm Basic Skills 3 - Maintaining Collections in CONTENTdm](#)

Instructor-led courses, each two hours long. Recommended for those who prefer a more structured approach to learning new software. Others may want to just dive in using the docs on the following page.

First Steps

[Jumpstart My First Collection](#)

This one-page document shows how to add objects to a collection using the CONTENTdm Administration web interface. Not ideal for adding large numbers of items, but definitely the best place to start.

[Jumpstart My Website](#)

This one-page document gets you started using the CONTENTdmWebsite Configuration Tool to customize the appearance and behavior of your CONTENTdm Website.

[Collection Building Overview](#)

A two-page introduction to the CONTENTdm Project Client.

[Building Your First Collection](#)

A more in-depth introduction to the Project Client.

[Sample Metadata Schemas for CONTENTdm Image and Text Collections](#)

Many libraries and other organizations have the majority of their digital resources in image and/or text formats. We have developed two sample schemas, one for images and one for text, and made them available to you with your CONTENTdm Administration list of collections. (If you do not find them or if they were deleted, let [CONTENTdm Support](#) know and they'll send you the templates.)

You can copy the sample schemas as many times as you need to generate multiple collections based on them. The following two pages list and describe the fields included in the Image and Text Collection Templates.

Please note. The use of **Controlled Vocabulary** is recommended for many of the fields in the Sample Metadata Schemas. Controlled Vocabulary must be enabled in CONTENTdm Administration before you can use it. For details, please see: [Controlled Vocabulary](#).

Sample Metadata Schema for CONTENTdm Image Collections

Title	A name given to the resource.
Creator	An entity primarily responsible for making the resource.
Topics	The topic of the resource. Typically, the subject will be represented using keywords, key phrases, or classification codes. Recommended best practice is to use a controlled vocabulary.
Description	An account of the resource. Description may include but is not limited to: an abstract, a table of contents, a graphical representation, or a free-text account of the resource.
Holding institution	An entity responsible for making the resource available.
Date (year)	A year associated with an event in the lifecycle of the resource.
Original material type	The nature or genre of the resource. Moving images, three-dimensional objects and sound recordings are all examples of Resource Types. Prefer DCMI Type Vocabulary for controlled list of authorized terms: http://dublincore.org/documents/dcmi-type-vocabulary/
Local institution identifier	An unambiguous reference to the resource within a given context.
Digital version of	A related resource in which the described resource is physically or logically included.
Rights information	Information about rights held in and over the resource. Rights information includes a statement about various property rights associated with the resource, including intellectual property rights. Rights statements should provide references or contact information. Additional clarification can be indicated via linking to an institutional policy statement or other web resource.
Other Date(s)	A point or period of time associated with an event in the lifecycle of the resource. Date may be used to express temporal information at any level of granularity. Recommended best practice is to use an encoding scheme, such as the W3CDTF profile of ISO 8601 [W3CDTF]. If more than one date is going to be used to describe the resource, it is recommended to use the sub-elements of Date to clarify the type of date, such as Date-Accepted, Date-Issued, etc.
Place(s)	Spatial characteristics of the resource. Prefer use of standard controlled vocabularies and name authority sources, such as Thesaurus of Geographic Names [TGN].
Time Period	Temporal characteristics of the resource. Use to describe the time period covered or represented by the resource, not the date when the resource was published. Temporal topic may be a named period, date, or date range. If using a named period, use a controlled vocabulary if possible such as Library of Congress Subjects (LCSH). Where appropriate, time periods can be date ranges in ISO 8601 W3C Date/Time Format standard.
People	The topic of the resource. Recommended best practice is to use a controlled vocabulary. Prefer map to MARC 650 if controlled, to MARC 653 if uncontrolled.

Sample Metadata Schema for CONTENTdm Text Collections

Title	A name given to the resource e.g., Best Practices for CONTENTdm and other OAI-PMH compliant repositories: creating sharable metadata Version 3.1
Author(s)	An entity primarily responsible for making the resource.
Topics	The topic of the resource. Typically, the subject will be represented using keywords, key phrases, or classification codes. Recommended best practice is to use a controlled vocabulary.
Description	An account of the resource. Description may include but is not limited to: an abstract, a table of contents, a graphical representation, or a free-text account of the resource.
Date of Publication (year)	A year associated with an event in the lifecycle of the resource.
Local institution identifier	An unambiguous reference to the resource within a given context.
Digital version of	A related resource in which the described resource is physically or logically included.
Rights information	Information about rights held in and over the resource. Rights information includes a statement about various property rights associated with the resource, including intellectual property rights. Rights statements should provide references or contact information. Additional clarification can be indicated via linking to an institutional policy statement or other web resource.
Other Date(s)	A point or period of time associated with an event in the lifecycle of the resource. Date may be used to express temporal information at any level of granularity. Recommended best practice is to use an encoding scheme, such as the W3CDTF profile of ISO 8601 [W3CDTF]. If more than one date is going to be used to describe the resource, it is recommended to use the sub-elements of Date to clarify the type of date, such as Date-Accepted, Date-Issued, etc.
Place(s)	Spatial characteristics of the resource. Prefer use of standard controlled vocabularies and name authority sources, such as Thesaurus of Geographic Names [TGN].
Time Period	Temporal characteristics of the resource. Use to describe the time period covered or represented by the resource, not the date when the resource was published. Temporal topic may be a named period, date, or date range. If using a named period, use a controlled vocabulary if possible such as Library of Congress Subjects (LCSH). Where appropriate, time periods can be date ranges in ISO 8601 W3C Date/Time Format standard.
People	The topic of the resource. Recommended best practice is to use a controlled vocabulary. Prefer map to MARC 650 if controlled, to MARC 653 if uncontrolled.
Publisher	An entity primarily responsible for making the resource available.
Other Contributors	An entity primarily responsible for making contributions to the resource.
Language(s)	A language of the resource.
Place of Publication	An entity responsible for making the resource available.
Transcript	A searchable text version of the content. This may be created from page images through the use of optical character recognition (OCR) software, whether outside of CONTENTdm or through the Project Client's OCR Extension (ABBYY FineReader). For PDF documents in CONTENTdm, if there is searchable text available, it will be extracted and placed in a field designated as Full text search data type.

Next Steps

For users who have just learned the basics of CONTENTdm, the following three documents are among the most useful and often among the most overlooked.

[Using a Controlled Vocabulary](#)

Many metadata fields should allow only certain specified values; this document tells you how to make that happen.

[Importing from Tab-Delimited Files](#)

Many libraries have existing metadata they want to batch load into CONTENTdm. This document shows an easy way to do that.

Several other metadata import methods are also available; please see:

[Entering Metadata](#)

[Getting Started with CONTENTdm Catcher](#)

[Configuring & Customizing Your CONTENTdm Website](#)

More advanced usage of the Website Configuration Tool — setting collection page banners, turning features on and off, and much more.

Specifics

More about Text Collections

[Creating and managing text collections using CONTENTdm](#)

Two-page overview; includes format recommendations per type of source material.

[Creating Documents with Full Text Searching](#)

[Using PDF Files in CONTENTdm](#)

[Managing and presenting digital newspapers with CONTENTdm](#)

[Adding EAD-Encoded Finding Aids in CONTENTdm](#)

More about Image Collections

[Image Rights Options: Using Bands, Brands and Watermarks](#)

[Creating a yearbook collection using CONTENTdm](#)

Compound Objects

[Creating Compound Objects \(Documents, Monographs, Postcards, and Picture Cubes\)](#)

Comprehensive overview.

[Using the Add Compound Objects Wizard](#)

Exhaustive treatment of CONTENTdm's principal compound-objects tool.

[Creating and Editing Compound Objects Using CONTENTdm Administration](#)

A lightweight alternative to the Add Compound Objects Wizard.

Audio and Video Collections

[Working with Audio and Video Files](#)

Customization and Analytics

[Custom pages and scripts](#)

[CONTENTdm 6.1 Custom Scripting Reference](#)

[Localizing the End-user Interface](#)

[Advanced Customization and API Reference](#)

[Getting Started with Google Analytics in CONTENTdm](#)

Additional Tools

[Using the WorldCat Digital Collection Gateway](#)

Create OCLC WorldCat records from your CONTENTdm metadata records.

[Using OCLC Connexion Digital Import](#)

Digital collection creation integrated with OCLC's flagship cataloging service.

[Archiving Full Resolution Images](#)

Use CONTENTdm to manage full resolution archival-quality images along with more compact display-quality images.

[Digital Archive – Getting Started Guide](#)

OCLC-hosted secure storage service with optional CONTENTdm integration.

[Getting Started with the CONTENTdm Catcher](#)

Batch loading of collection metadata.

[Getting Started with the CONTENTdm Flex Loader](#)

Import data into CONTENTdm from METS/ALTO newspaper and monograph formats.

CONTENTdm Administration

[Administration Guide for Hosted Instances](#)

See the "Learning about working with my site hosted by OCLC" section for the latest version.

[Administration Guides for local installations](#)

See the Linux or Windows section of this page as appropriate.

[Managing User Rights](#)

[Implementing HTTPS in CONTENTdm 6](#)

[Performing Directory Uploads in CONTENTdm](#)

Alternatives to the standard Project Client HTTP or HTTPS upload protocol.

Workflows and Best Practices

From OCLC:

[Implementing your digital library with CONTENTdm](#)

A checklist for digital library projects.

[Best Practices for CONTENTdm and other OAI-PMH compliant repositories: creating sharable metadata](#)

From elsewhere:

The Thomas J. Watson Library Office of Digital Projects

<https://sites.google.com/site/departmentofcircumlocution/>

Best practices from a project to digitize materials from the Libraries of The Metropolitan Museum of Art. Includes some CONTENTdm-specific material.

Digital Standards

<http://www.fhsu.edu/library/digital/Tools/>

From the Forsyth Library Digital Collections Initiative at Fort Hays State University.

Creating and Keeping Your Digital Treasures: A User Guide

http://www.slwa.wa.gov.au/digital_treasures

From the State Library of Western Australia.

SMU Central University Libraries Digitization Guidelines and Procedures

<http://digitalcollections.smu.edu/all/cul/docs/culdigitizationguidelines.pdf>

Federal Agencies Digitization Guidelines Initiative

<http://www.digitizationguidelines.gov/>