CONTENTdm® 6.10 Administration Guide for Hosted Instances

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This guide details how to administer the CONTENTdm software for use by your organization. This entails administering the server and installing the Project Client software.

This guide assumes that you already have access to your hosted instance and know its website and server URLs. These were previously sent to you in a welcome email from the CONTENTdm Hosting team.

Before You Begin

You must designate a user to be the initial administrator of your CONTENTdm Server before you can adjust settings or add other users.

If you have not already done so, designate your initial administrator by sending email to support@oclc.org. Include the URL of your CONTENTdm Server, the administrator’s name, email address and phone number, along with the user name*.

* To create a new user account go to www.worldcat.org/account/?page=register.

The initial administrator will be granted privileges of CONTENTdm Administrator. The CONTENTdm Administrator role has control over all CONTENTdm administrative functions, including adding other users, granting and revoking user privileges, and adding and deleting collections. A technical lead or project manager is the best person to use this account.

The CONTENTdm Hosting service shares a user account management system with WorldCat.org. All CONTENTdm Hosting service user names and passwords are created and managed using tools in WorldCat.org.

Section 1 CONTENTdm Components

CONTENTdm has three components:

- CONTENTdm Server. The CONTENTdm Server stores your data items and serves them to your CONTENTdm Website. The CONTENTdm Server consists of a number of defined collections and is administered through a standard Web interface, written mainly in PHP.

- CONTENTdm Website. The CONTENTdm Website is the public interface to your digital collections for end users. It communicates data requests from end-users’ browsers to the CONTENTdm Server and then displays the returned data.

- Project Client. The Project Client enables you to add items to your collections and enter metadata to describe them. Items are uploaded to the CONTENTdm Server where they are approved and indexed using the CONTENTdm Administration interface.
Section 2  CONTENTdm Server Administration Overview

Your CONTENTdm Server comes to you ready to use, but before you begin you must have OCLC add your initial administrator user name to your system (see Before You Begin above).

Your CONTENTdm Server’s hosting environment is set up with:

- **Nightly backups** of all your collections (digital items, metadata, and indexes), your system settings, and user interface customizations. OCLC can restore your CONTENTdm data to any point in the past 12 weeks.

- **24x7 systems monitoring** by onsite operations staff. OCLC’s operations control center staff monitor CPU utilization, memory utilization, disk availability, and network accessibility for your CONTENTdm Server.

- **Proactive site availability monitoring** using automated scripts. Every ten minutes, an automated script attempts to access your site from the Internet. Response time is monitored and operations control center staff are notified if responses are incorrect or outside of response time thresholds.

- **Monthly email reports of item & storage counts**. Each night the hosting service tallies the number of items in your CONTENTdm Server and gathers the storage used. This information is aggregated and sent to you each month in an email report.

Your CONTENTdm software includes:

- The CONTENTdm Website installed and ready for you to brand and tailor as your own. For more information, see Jumpstart My Website.

- A preloaded Sample Collection that can be searched, and My First Collection, an empty collection that you can use to learn how to build your first collection. For more information, see Jumpstart My First Collection.

- Three sample metadata collections: Dublin Core, DC Terms, and Visual Resources Association. These collections are empty, but their metadata configurations can be used to create other collection definitions.

- Two sample metadata schemas: Image Collection Template and Text Collection Template. For more information, see Sample Metadata Schemas for CONTENTdm Image and Text Collections.

The CONTENTdm Server is administered from a Web interface. Details about the Administration of your CONTENTdm Server are at http://www.contentdm.org/help6/server-admin/. Here you can learn about these topics:

- Accessing Server Administration
- Working with Collections
- Working with Users
- Reports
- WorldCat Sync
- … and more!
Using CONTENTdm Administration you can set up a new collection on the server that you can use to build your own collection of items. Then you can add new users, and assign collection administrator privileges.

While these three steps are explained in sequence, they can be performed any time that you want to add a collection, add users, or assign permissions.

Section 3  Adding a New Collection

Follow these steps to define a new collection on your server.

1. Navigate to CONTENTdm Administration. Use the CONTENTdm Server URL listed in your Welcome email.

   When you enter the CONTENTdm Server URL in a browser, you will be prompted to log in to CONTENTdm Administration.

2. Log in as a CONTENTdm Administrator, either using the initial administrator account or as a user given CONTENTdm Administrator privileges by the initial administrator.

3. Click the Server tab, choose Collections, and click Add Collection.

4. Select Create a new collection. Choose Simple Dublin Core template from the drop-down list.

5. Enter the new collection name. The collection name is the title of the collection. The maximum number of characters allowed in a collection name is 80.

6. Click Add. Your new collection has now been defined.

Section 4  Adding a New User

The CONTENTdm Hosting service shares a user account management system with WorldCat.org. All CONTENTdm Hosting service user names and passwords are created and managed using tools in WorldCat.org.

Create new user accounts. To create a new user account, go to www.worldcat.org/account/?page=register.

Remind your users that CONTENTdm user names should not contain these characters: ampersand (&), percent (%).

Forgot user name or password? If a user has forgotten a user name or password, direct them to http://www.worldcat.org/account/?page=forgot.

Add a user to CONTENTdm. Follow these steps to add a new user to CONTENTdm:

1. Navigate to CONTENTdm Administration. Check your Welcome email for the CONTENTdm Server URL.

2. When you enter the CONTENTdm Server URL in a browser, you will be prompted to log in to CONTENTdm Administration.
3. After you’ve logged in, click the Server tab.

4. Click Users.

5. Click Add User.
6. Enter an existing user name.

7. Select the rights that you wish to assign to the user. For more information about user capabilities and privileges, see http://www.contentdm.org/help6/server-admin/users2.asp.

8. Click Add.

If the user is successfully added, you will see a view of the user and the rights assigned to the user.

Section 5 Assigning Collection Administration Privileges

After a collection has been added, you must designate a user to administer the collection. The CONTENTdm administrator has administration privileges to all collections. This user can assign collection administration privileges to one or more of the user accounts as well. For more information, see Managing Users.

To designate a collection administrator for the collection:

1. From CONTENTdm Administration, click the Server tab, click Users, and click Edit next to the user name you wish to configure as collection administrator.

2. In the Collection Rights section, you can assign privileges to a user for a collection. To assign privileges, click on a collection name, then check boxes for the rights you wish to assign to this user.

3. When you have finished assigning rights to this user click Save Changes and you will be returned to a page where you can review the settings for this user and this collection.
Remember: You can configure collection administration privileges at any time after a collection has been defined.

Section 6  Preparing for and Installing the Project Client

After you have designated a collection administrator, you are ready to install the Project Client software.

Preparing for Installation

Before installing the Project Client, please confirm that the system you are using meets the Project Client system requirements at http://www.oclc.org/contentdm/resources.en.html.

Installing the Project Client

To install the CONTENTdm Project Client, go to the Downloads page of the CONTENTdm User Support Center, (www.contentdm.org/USC/downloads). When the zip file is downloaded to your machine, click on it to begin extraction and installation of the Project Client. You will need your CONTENTdm license code to activate the Project Client after it is installed.
Section 7  Using the Project Client

The first step after the Project Client is installed is to create a new project.

To create a new project in the Project Client:

1. Click on the Project Client program from the Windows Start menu under the OCLC folder.

2. Click Create Project. (All work in the Project Client is done in projects. Items in projects are uploaded to a pending queue for review by the CONTENTdm administrator who approves them and indexes the collection to add them.)

3. Follow the steps in the wizard to define your project: specify a name for the project, enter the CONTENTdm Server URL, choose your CONTENTdm collection, and log in with your user name.

The project is now ready for use. In subsequent sessions, the user should start the Project Client and click Open Existing Project to select the previously created project.

Section 8  Customizing Your Website

CONTENTdm provides you with the Website Configuration Tool for branding and tailoring the appearance and behavior of key elements of your CONTENTdm Website and collections. To access this tool, use the Website link in the CONTENTdm Administration interface. Using this tool requires no programming skills. (If you are just getting started with CONTENTdm, see Jumpstart Your Website as a quick guide on what to do first.)

To learn more broadly about customizing your website see http://www.contentdm.org/help6/custom.

Section 9  Choosing a Branded URL

Your CONTENTdm site URL is the front door to your digital collections. Making your site URL easy to remember makes it easier for users to get to your site. You can accomplish this by implementing a branded URL.

System-assigned URLs

Every site in CONTENTdm Hosting Services is issued a 5-digit system-assigned site ID. Each site is issued two URLs based on its site ID: a CONTENTdm Website URL and a CONTENTdm Server URL. For example, if your site ID is 15700, then your CONTENTdm Website URL is http://cdm15700.contentdm.oclc.org and your CONTENTdm Server URL is https://server15700.contentdm.oclc.org. These URLs aren’t pretty, they aren’t memorable, and they probably don’t fit in with your organization’s branding in any way.

How do I get a branded URL?

We can work with you to set up a branded URL for your CONTENTdm Website. There are two types of branded URLs: a branded host header or a custom host name.
Implementing a branded host header

The simplest option is to use a branded host header — for example, "cdmdemo". The resulting branded URL would be "http://cdmdemo.contentdm.oclc.org". To implement this option, email support@oclc.org with your branded host header and they'll take care of getting it set up.

Implementing a custom host name

The other option is to use a custom host name that you control in your own domain — for example, the University of Arizona might use "content.library.arizona.edu". The resulting branded URL would be "http://content.library.arizona.edu".

Please note that you cannot use your primary domain name as a custom host name. For example, the domain name "arizona.edu" cannot be used as a custom host name. Only a host name that includes at least one subdomain, such as "contentdm.arizona.edu" or "content.library.arizona.edu", can be used as a custom host name.

To implement a custom host name, you need to work with your local network engineers to choose a host name in your domain, then have the engineers make a CNAME (Canonical Name) entry in your local DNS (Domain Name Server), associating the system-assigned CONTENTdm Website URL with the custom host name you've chosen.

Once that's in place, email support@oclc.org with your custom host name and they'll get it set up on OCLC's end. Once the setup is completed on both ends, your users will be able to access your site via the custom host name.

Enabling XML Sitemaps

Once you have implemented a branded URL, you can set it as your site's Public URL, then enable XML Sitemaps. XML Sitemaps tell search engines what's on your site, making it easier for end users to find your content. For details, please see SEO Help.

Section 10  Setting Permissions for End-user Access

CONTENTdm allows you to set permissions for end-user access for entire collections or at the individual item level. These permissions can be set for any user you've added to your hosted CONTENTdm Server.

Restrict Access to Collections by User Name

As administrator, you can restrict access to collections by user name in CONTENTdm Administration → Server → Collections → Configuration. Click the Configure link next to the collection you would like to restrict. On the Collection Configuration page, click the Edit link. To restrict the collection based on user name, enter the fully qualified user names of the users to whom you want to grant access. Separate user names with semicolons.
In this example, Danny and Viktor will be able to log in to view the Sample Collection. When they log in, they will enter their user names, e.g. Danny. For more information about setting permissions for collection access, see Accessing and Editing Collection Configuration.

Restrict Access to Items by User Name

As administrator, you can restrict access to items by user name in CONTENTdm Administration → Items → Edit. Be sure the collection is selected in the Current Collection drop-down list. Search or browse for the items that you would like to restrict and then go to Metadata → Edit Item Permissions. To restrict an item based on user name, enter the user names of the users to whom you want to grant access. Separate user names with semicolons.

In this example, Danny and Viktor will be able to log in to view the selected item. When they log in, they will enter their user names, e.g. Danny. For more information on setting permissions for item access, see Editing Item Permissions.
You can enable a Log In link in your CONTENTdm Website header by using the Website Configuration Tool. (From the Website Configuration Tool, click the Tools option and then click Permissions.)

Section 11  Importing Your Own Controlled Vocabulary

CONTENTdm allows you to create controlled vocabularies for the metadata in your collections.

You can establish a controlled vocabulary for a field in three ways:

- Use a Thesaurus from the OCLC Terminologies Service that is preloaded
- Use the contents of an existing field, or
- Import a list of terms from a file on your CONTENTdm Server

The last option, “import a list of terms”, requires that you upload a simple text file to the server and input the path to the file in the CONTENTdm Administration dialog for this option.

There is no automated facility to support “import a list of terms” in the CONTENTdm Hosting environment, so you must email the file you wish to upload to support@oclc.org and request that the file be uploaded to your CONTENTdm instance.

Section 12  Support

For more information about using CONTENTdm, contact technical support at support@oclc.org or visit the CONTENTdm Support & Training website.