# Using Templates in the Project Client
to Automate Repeating/Constant Metadata

1) Once you are ready to upload your single items or compound objects via the Project Client with your tab-delimited metadata text files, you may use the Metadata Templates located inside the Project Client to enter your constant metadata. NOTE: You still need all metadata fields in the first row of your metadata spreadsheets, but you will leave empty the cells in the columns for fields that you enter constant metadata into the Project Metadata Template.
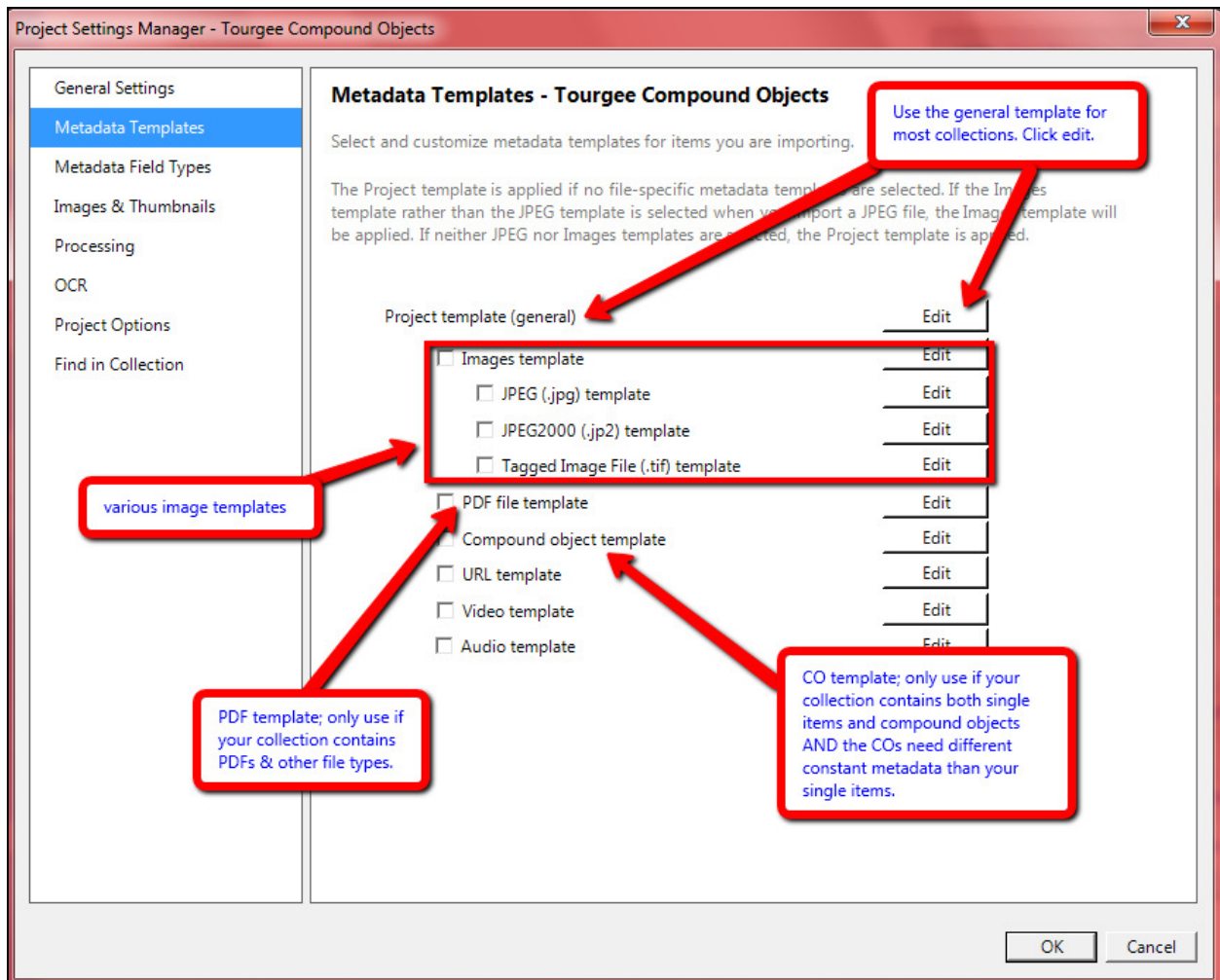
Field present in metadata spreadsheet but no values entered in cells

U
Collection ID

2) Launch Project Client and navigate to the Metadata Templates:
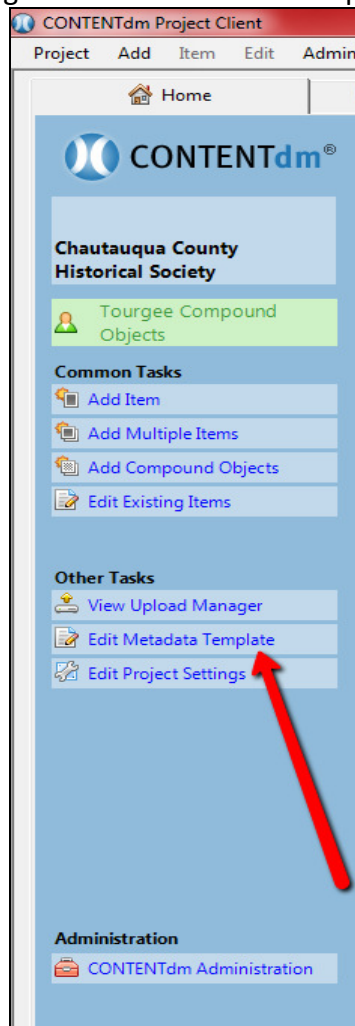
3) For most collections, you will need only the [Project template (general)] option, but for collections that are a mix of different image types, such as some JPEGs, some TIFFs, etc., you may want to use the more granular image templates to manage constant metadata for these items. This is because the field, Format of Digital, is constant metadata for each file type. Thus, for a collection of all TIFFs, the general template can be used because Format of Digital will be TIFF for the entire collection, whereas Format of Digital for a collection with multiple file types would require the use of the more specific templates for constant metadata.

Project Settings Manager - Tourgee Compound Objects

General Settings
Metadata Templates
Metadata Field Types
Images & Thumbnails
Processing
OCR
Project Options
Find in Collection

Metadata Templates - Tourgee Compound Objects

Select and customize metadata templates for items you are importing.

The Project template is applied if no file-specific metadata templates are selected. If the Images template rather than the JPEG template is selected when you import a JPEG file, the Images template will be applied. If neither JPEG nor Images templates are selected, the Project template is applied.

Use the general template for most collections. Click edit.

Project template (general)	Edit
☐ Images template	Edit
☐ JPEG (.jpg) template	Edit
☐ JPEG2000 (.jp2) template	Edit
☐ Tagged Image File (.tif) template	Edit
☐ PDF file template	Edit
☐ Compound object template	Edit
☐ URL template	Edit
☐ Video template	Edit
☐ Audio template	Edit

various image templates

PDF template; only use if your collection contains PDFs & other file types.

CO template; only use if your collection contains both single items and compound objects AND the COs need different constant metadata than your single items.

OK   Cancel

4) Enter your constant metadata into the general Project Template window:

Leave all the Default Type drop-down menus set at "Text," except for [File Name], for which you must select "File Name" as the Default Type. Click OK when finished.

5) Now you are ready to begin uploading items or objects, and any constant metadata you've entered in the Project template will be applied to those fields upon upload. You can always select [Edit Metadata Template] in the left navigation menu of the Project Client and change your constant metadata, but any changes you make here will apply only to those items and objects uploaded after you have edited the Project template.