Tab-Delimited File
and
Multiple Single Items

Content

Why use Tab-delimited Files in CONTENTdm Project Client to upload items?

• Tab-delimited files are an easy way to upload many single objects, a single compound object, or multiple compound objects along with their associated metadata.

• Tab-delimited files leave the creator of the metadata with a record of the metadata in case the record is needed again.

• Multiple creators of metadata can work in the same file to create the metadata record.

How to create a Tab-delimited File:

- Use Excel to create the file – this is the working file.

- All cells must be formatted for **text**.

- The Excel file must have specific information in specific columns and rows for single items and compound objects (documents, post cards and cubes – one format and monographs – 2nd format).

- Once all the metadata has been entered, the file is saved as an Excel file and then as a Tab-delimited file (txt).

- Best practice is to always work in the Excel file and then save the file as a Tab-delimited file (txt).

Work in Excel to create the Tab-delimited File:

•**One Excel column must contain the file name of the images being imported and be mapped to <u>Object File Name</u>** - Best practice, the column that contains the file names of the imported images in the <u>last field column used in the Excel file.</u>

•The file names must exactly match the contents of the upload directory for the files. One single mismatch causes the entire upload to fail.

•At least one metadata field must map to the **Title** field.

•Remember for New York Heritage collections the **Collection ID** metadata field must be filled in for upload to the CONTENTdm server. This content can be added in the Tab-delimited file or in the Project Client.

- Use a tab for the delimiting character.

- End each record with a carriage return.

- Do not use carriage returns or tabs within a field.

- The end of the document should be the very end of the last word in the last line, with no extra blank lines or spaces.

- Remove special characters from file names and collection metadata field names. Special characters are: \ / : * ? " < > |

•When entering file names, be sure to include the extension, even if your operating system hides the extension type. Common extension types are JPG, TIF, GIF, and PDF.

•When entering file names, enter only the file name of the item, such as *item.jpg*. Do not enter full path names such as *c:\windows\item.jpg*.

•When importing files, use unique file names for each item. Using capital letters in the file name does not make file names unique. The file name *item.jpg* is treated the same as *ITEM.jpg* and *ITEM.JPG*.

•**Store all of the items referred to in the Tab-delimited file in one folder or sub-directory.**
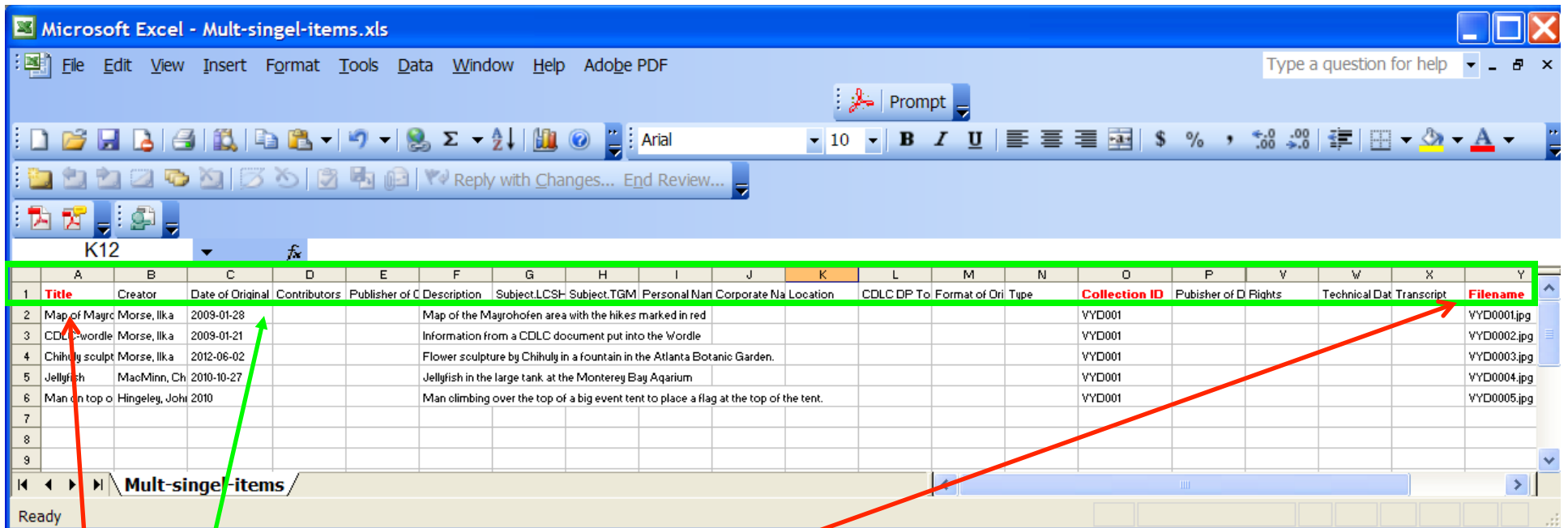
Example:
Multiple Single Items
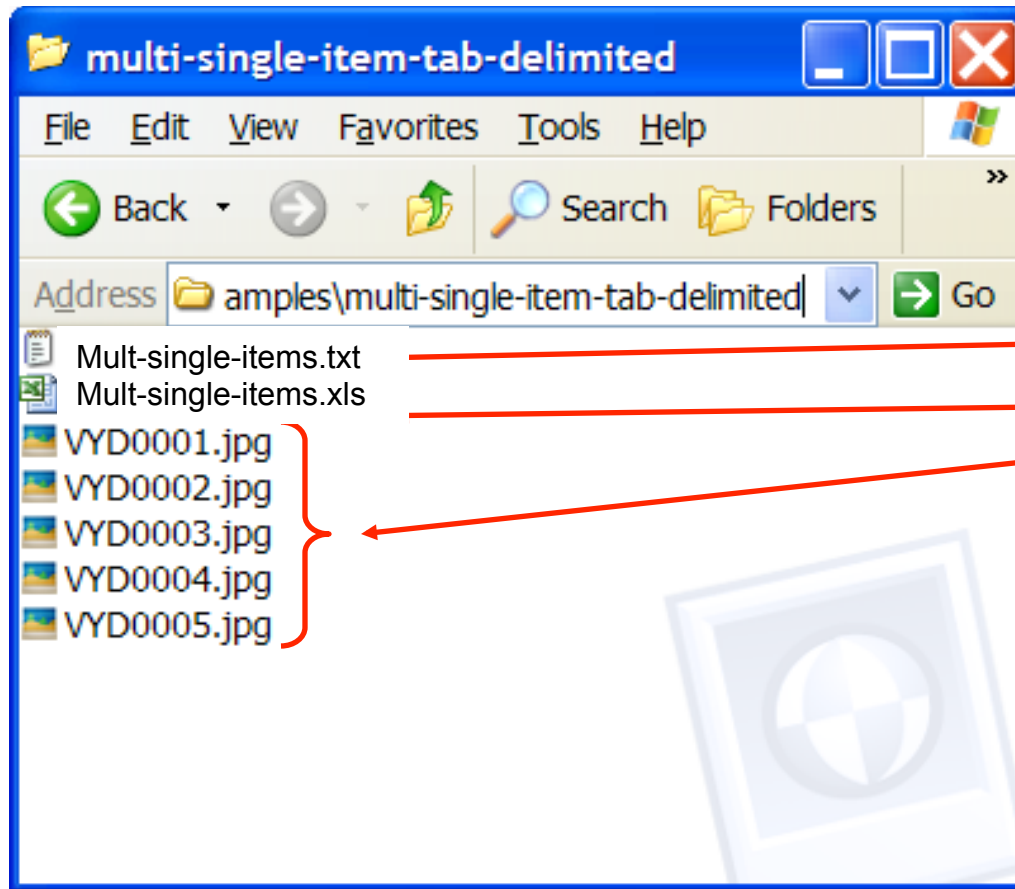
Folder set up for multiple single items.

Folder contains:

--Tab-delimited file (txt),
--Excel file (xls),
--and the 5 single items to be imported into CONTENTdm Project Client for this example.

(The tiff files can also be in this folder but <u>must be stored</u> in a sub-folder).

Excel file set up for multiple single items:

The **first row** contains the names of the metadata fields for the metadata being imported. All cells are formatted as text. The **first row** must contain **Title** and **File Name** fields (Best Practice: last metadata field column used for **File Name**) .

Once the Excel file is created, completed, and **saved** as an Excel file, **save the file again as a Tab-delimited file** (txt).

--Tab delimited file

--Excel file

--Image files

All in one folder
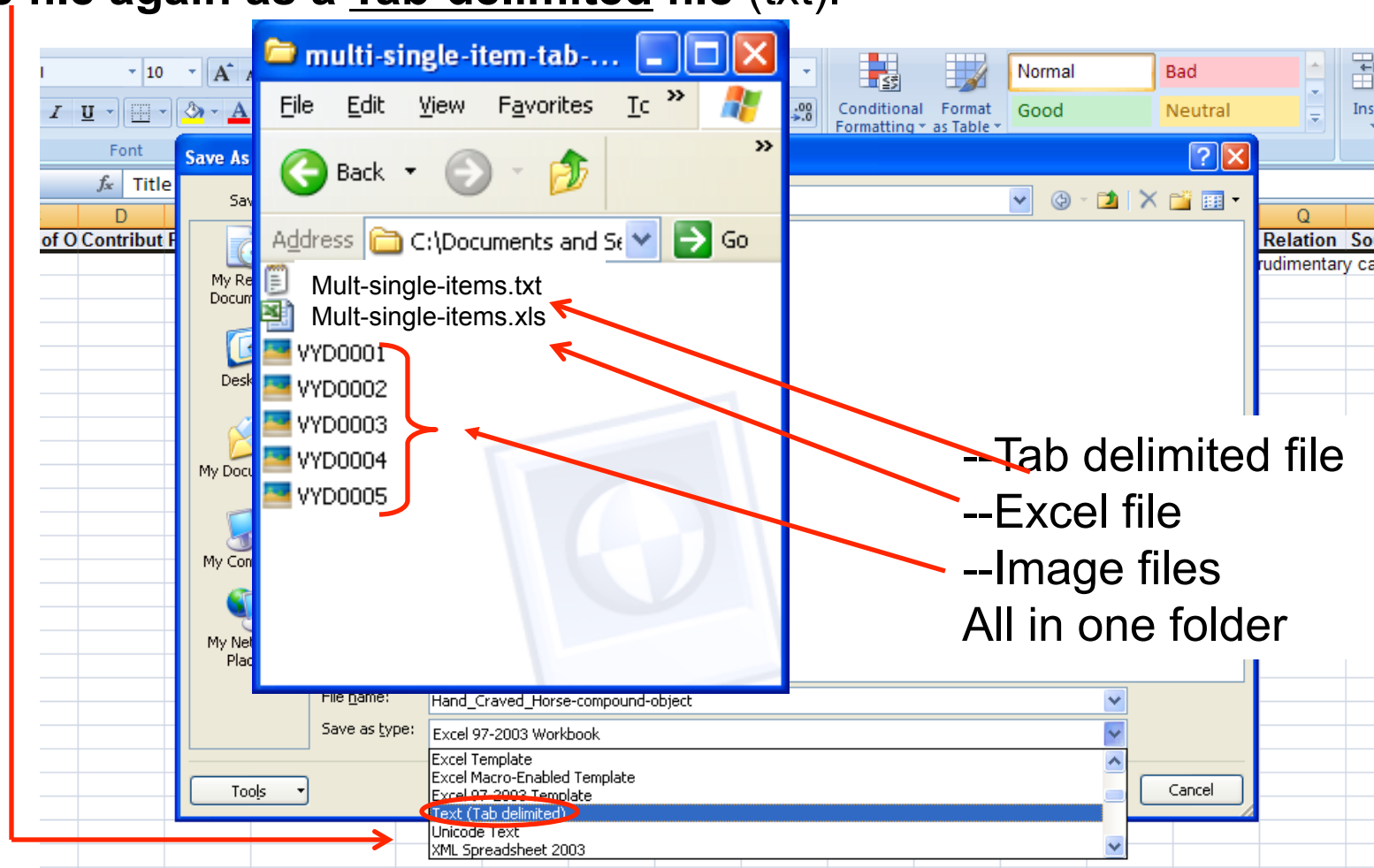
Note: Tab-delimited format does not support Excel workbooks that contain multiple worksheets. To save the active workbook sheet (the sheet you have open) <u>click</u> on **OK**.
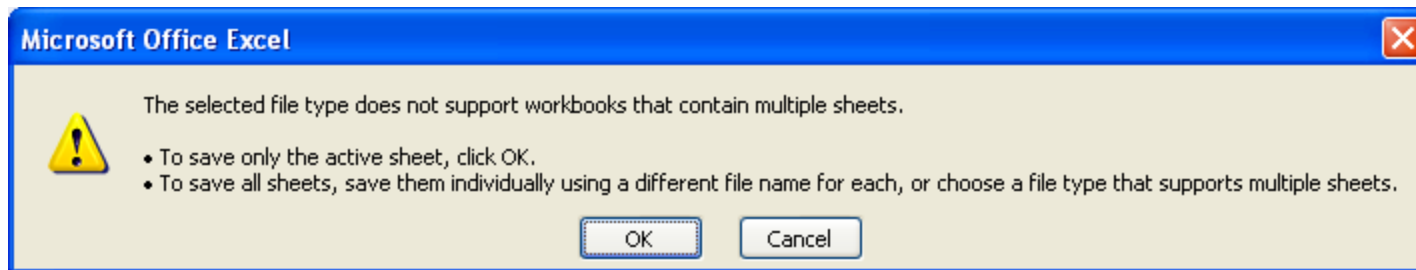
You want the worksheet in Tab-delimited format, so <u>click</u> on **Yes**.
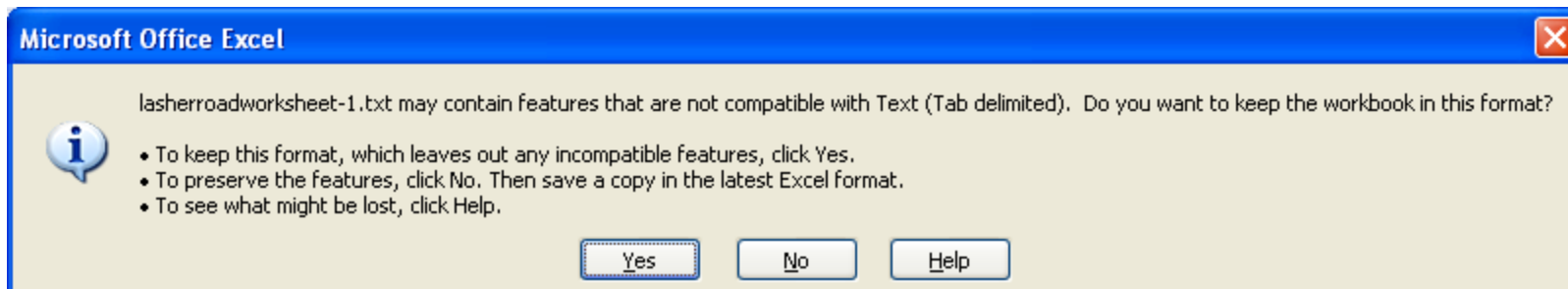
If changes need to be made in the Tab-delimited file, make the changes in the Excel file, save it, and then save it again as a Tab-delimited file. <u>**It is best not to work in the Tab-delimited file.**</u>

Import Tab-delimited file into CONTENTdm Project Client

• Open **CONTENTdm Project Client.**

• Open a **Project** or create a **new Project.**

• In the **Project tab** view.
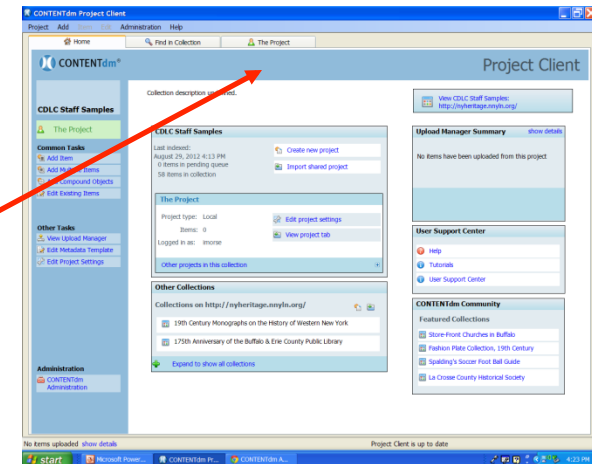
• The next 5 steps are **very important** because the **File Name** field in the Tab-delimited file must be mapped to "**Object File Name**" not to the metadata field **File Name**. The items being imported into **CONTENTdm Project Client** will not be uploaded to the **CONTENTdm server** without the **File Name** metadata field information for New York Heritage collections.
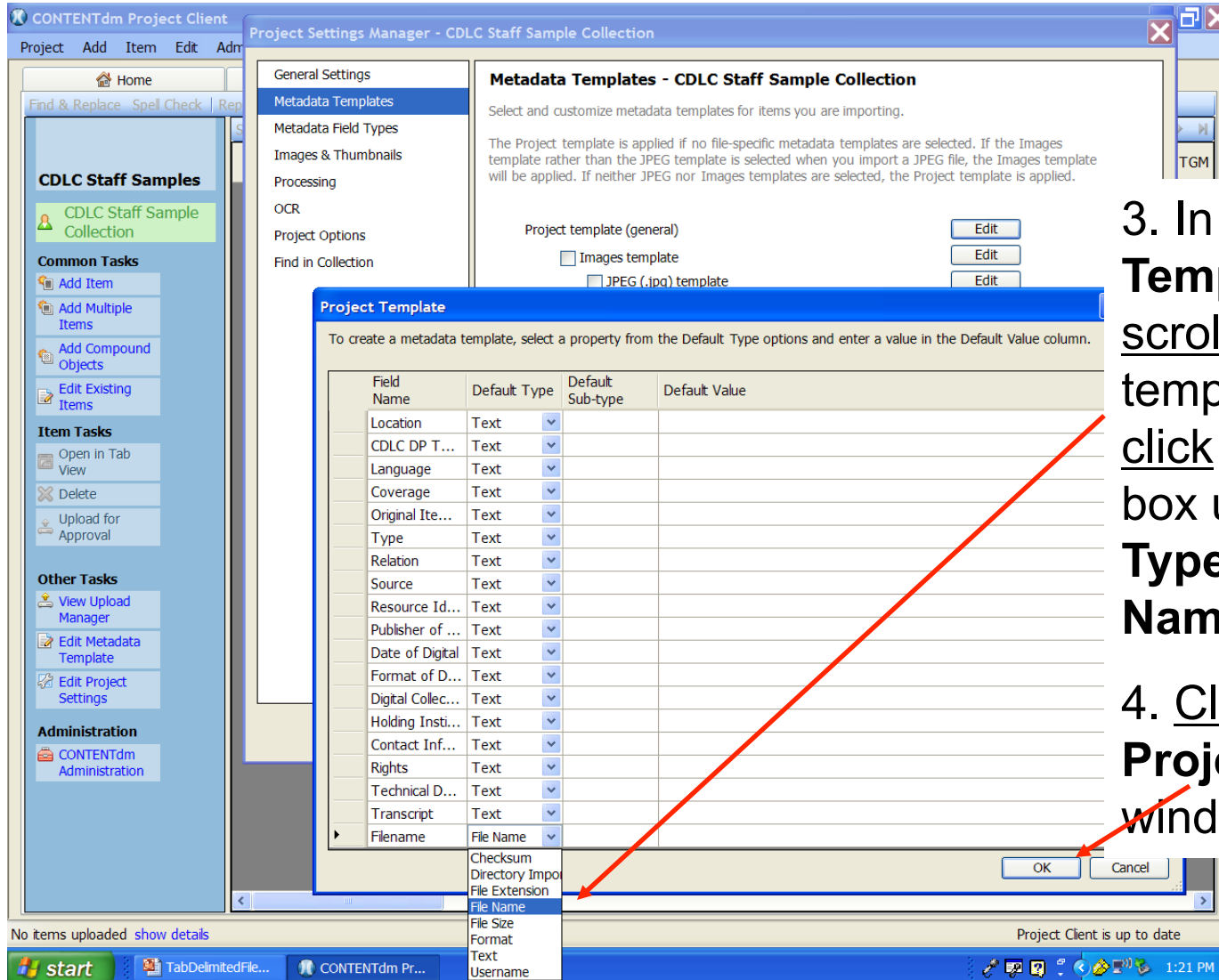
To automatically collect the File Name metadata information follow the next 5 steps.
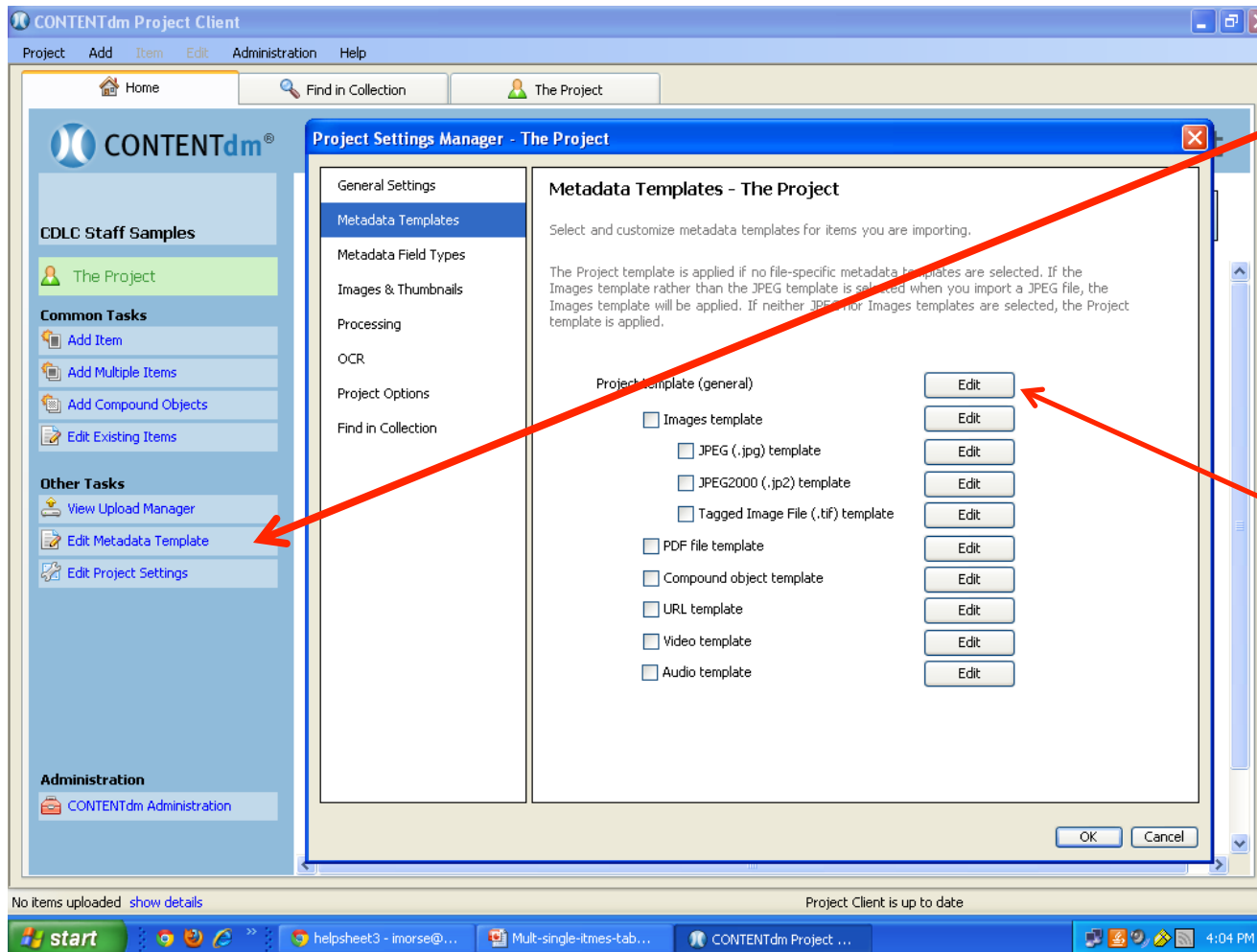
1.Click on **Edit Metadata Template** – the **Project Settings Manager** window opens.

2. Click on **Edit** for the **Project template (general)**

3. In the Project Template window, <u>scroll</u> down the template to **Filename**, <u>click</u> on the drop down box under **Default Type**, and highlight **File Name.**

4. <u>Click</u> on **Ok** in the **Project Template** window.

new york heritage
digital collections

CONTENTdm Project Client

Project | Add | Item | Edit | Administration | Help

Home | Find in Collection | The Project

Find & Replace | Spell Check | Replace Items | More Actions ... |

Project Settings Manager - The Project

CDLC Staff Sam

The Project

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

Common Tasks
Add Item
Add Multiple Items
Add Compound Objects
Edit Existing Items

Item Tasks
Open in Tab View
Delete
Upload for Approval

Other Tasks
View Upload Manager
Edit Metadata Template
Edit Project Settings

Administration
CONTENTdm Administration

Metadata Templates - The Project

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.

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

OK | Cancel

No items uploaded show details   Project Client is up t

start | CONTENTdm Pr... | Microsoft Power... | Browse | New Y...

5. Click on **Ok** in the **Project Settings Manager** window.

Now, **CONTENTdm Project Client** software will collect the information needed for this field automatically.

Remember, items can not be uploaded to the **CONTENTdm server** without the **File Name** metadata field information.
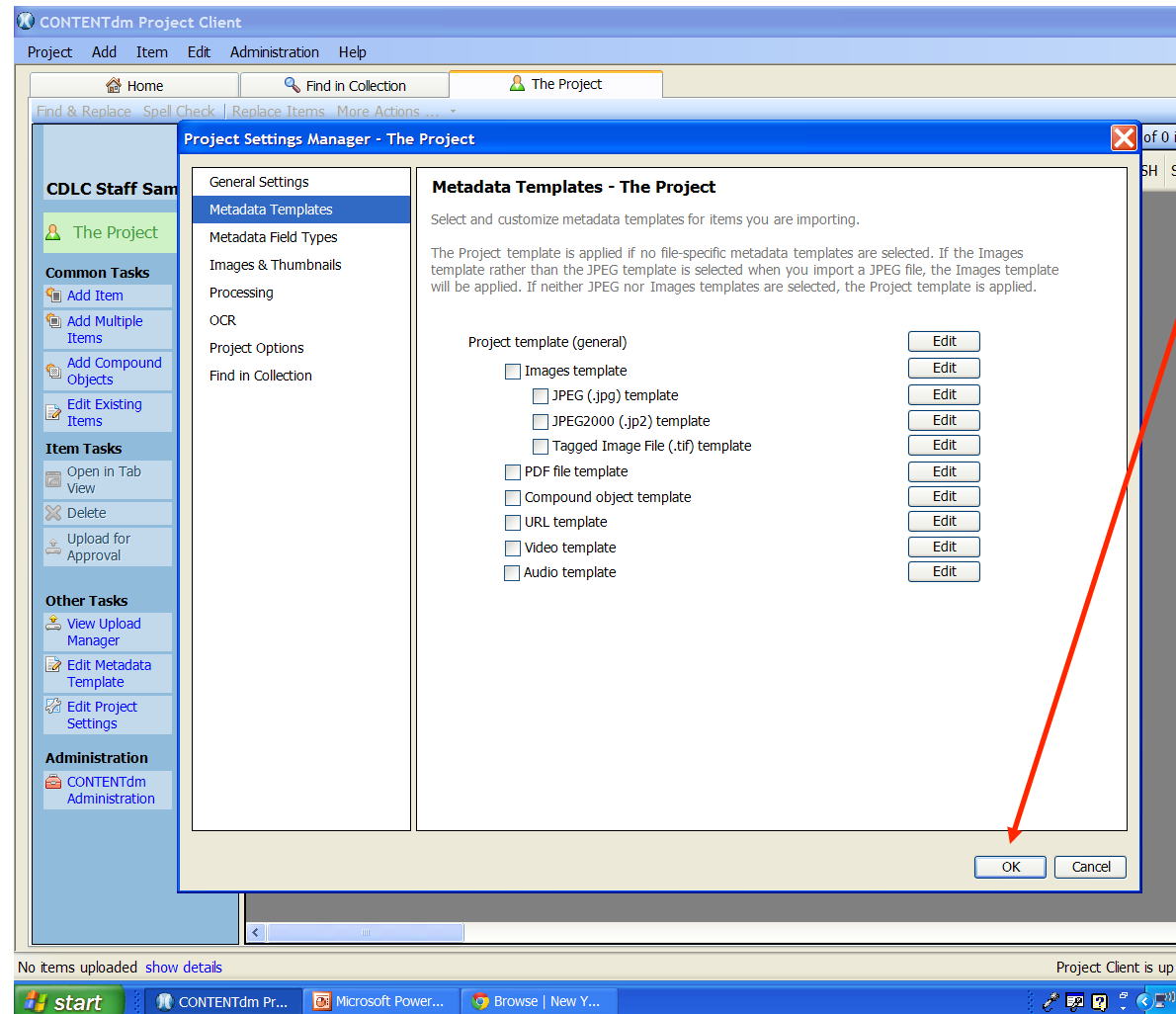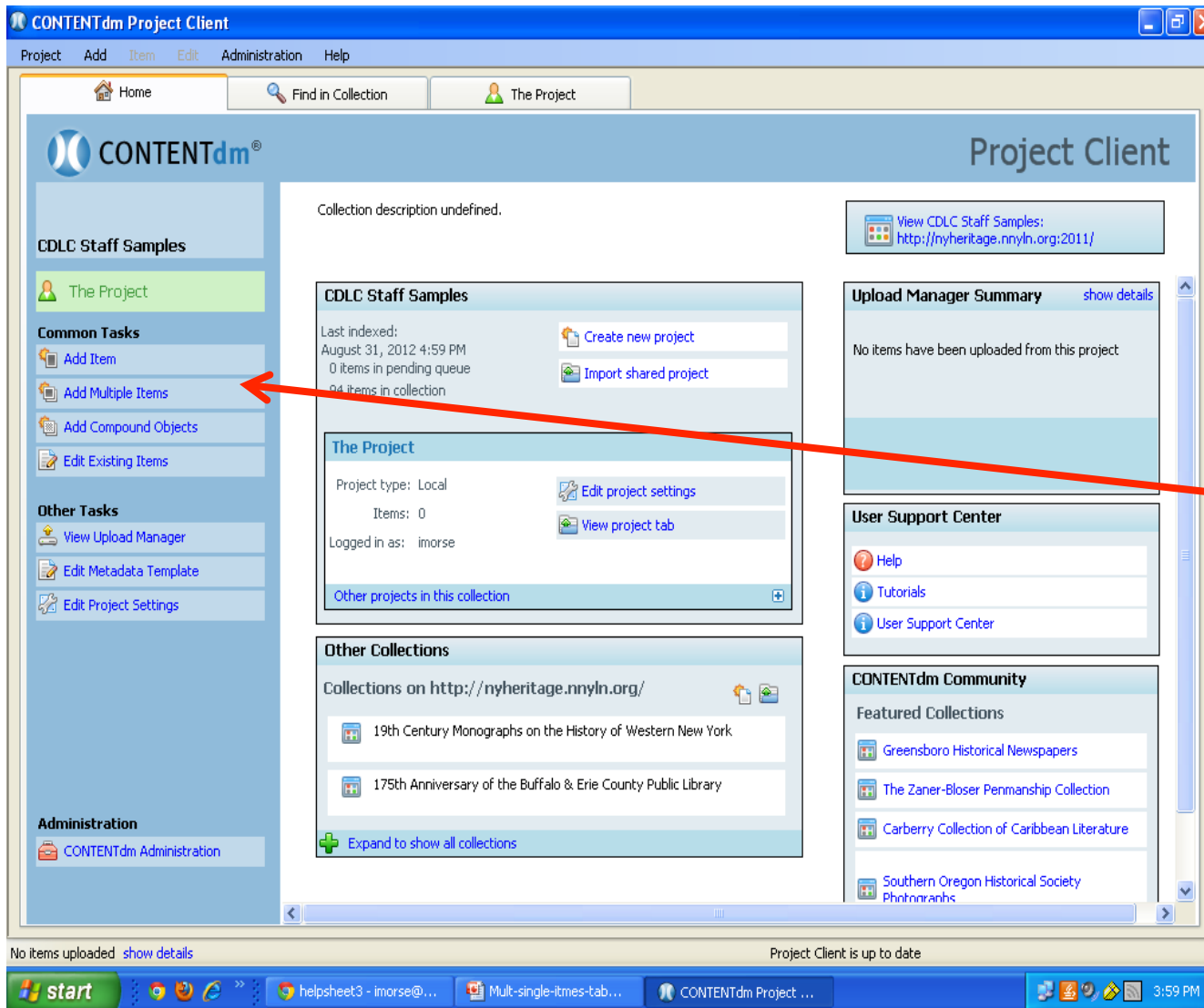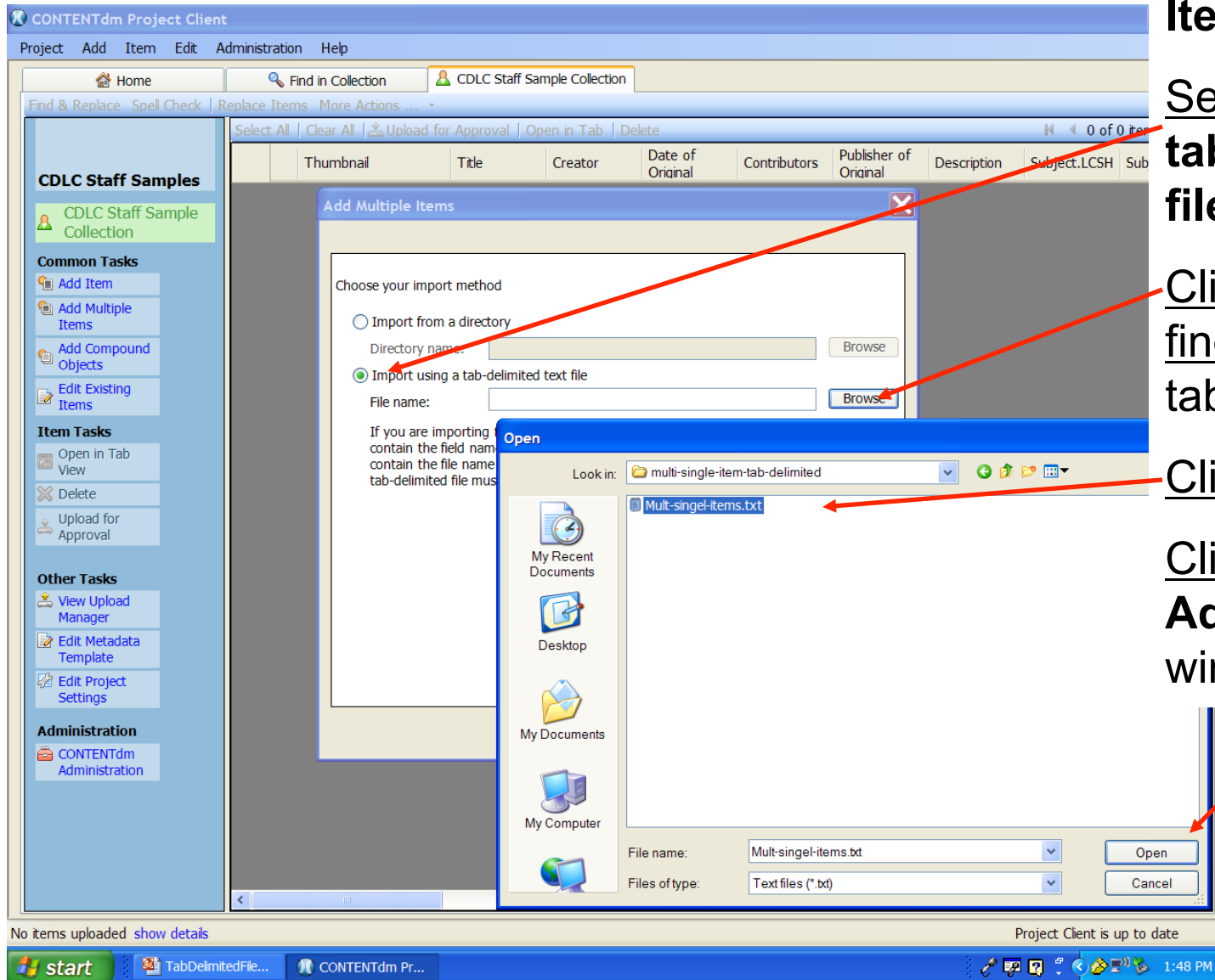
Import Files

You are now back in the **Project tab** view and ready to **import the Tab-delimited file, and the multiple single items.**

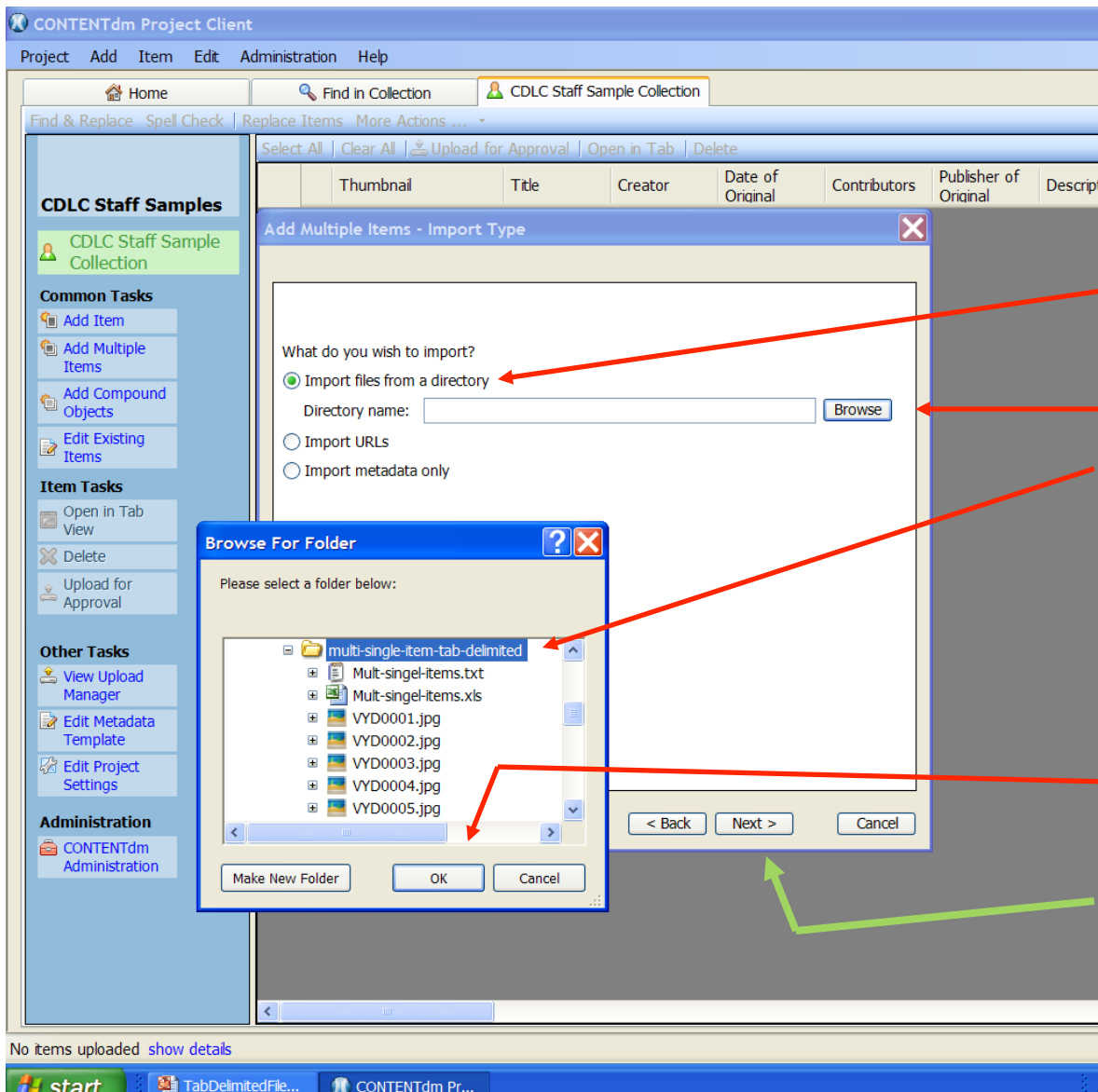<u>Click</u> on **Add Multiple Items.**

The **Add Multiple Items** window opens.

<u>Select</u> **Import using a tab-delimited text file.**

<u>Click</u> on **Browse** and <u>find</u> and <u>highlight</u> the tab-delimited text file.

<u>Click</u> on **Open**

<u>Click</u> on **Next** in the **Add Multiple Items** window.

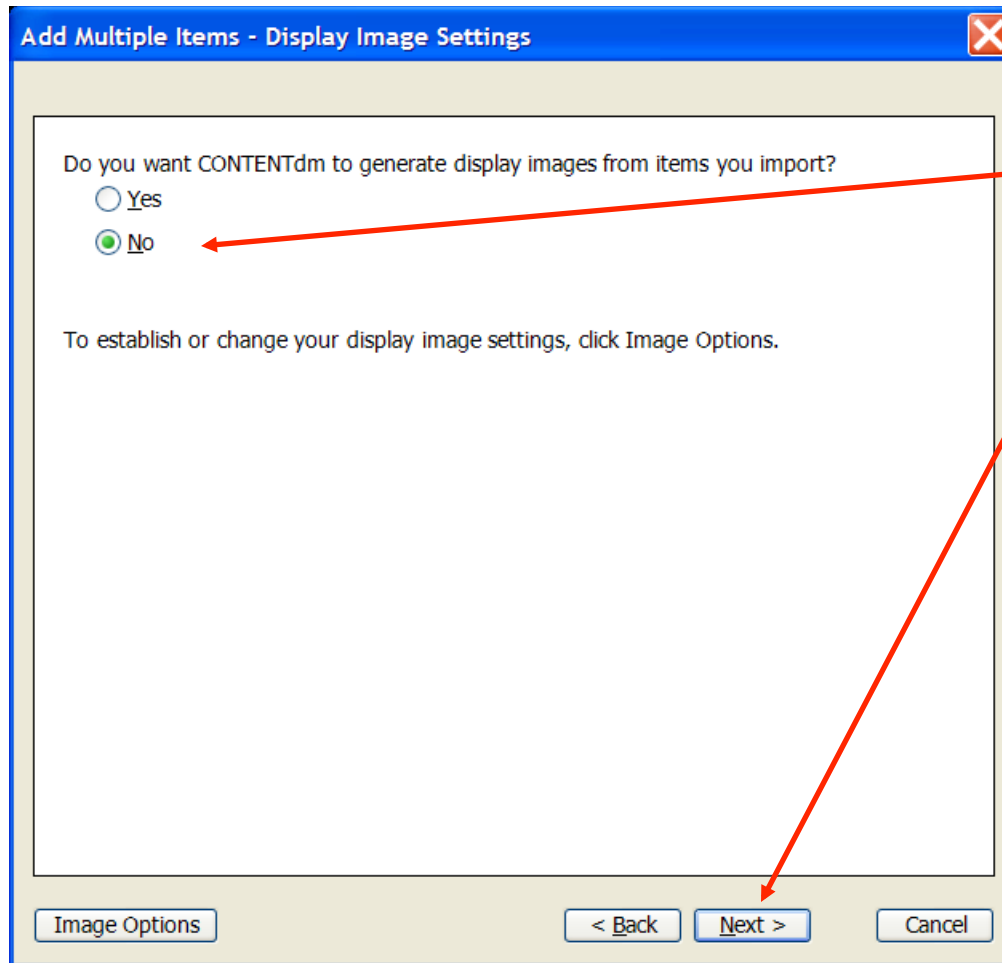The **Add Multiple Items – Import Type** window opens.

Select **Import files from a directory**

Click on **Browse**

Find and highlight the name of the folder that contains the multiple items that are being imported into the **Project Client**.

Click on **OK**

Click on **Next** in the **Add Multiple Items – Import Type** window.

The **Add Multiple Items – Display Image Settings** window opens.

Select **No**.

Click on **Next**.

Note: CONTENTdm Project Client can automatically create a jpg or jpg2000 file. This is what the **Display Image Settings** window is referring to. If you are interested in finding out more about this feature of the Project Client please contact your council.
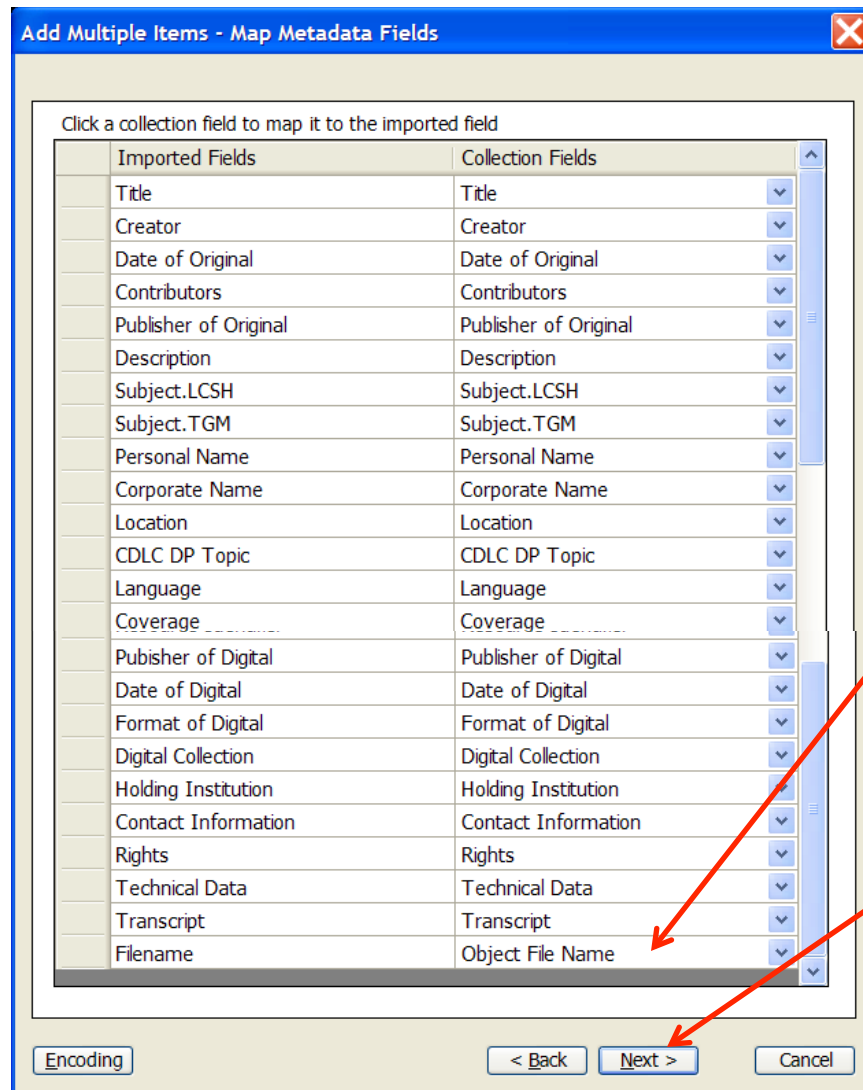
The **Add Multiple Items – Map Metadata Fields** window opens.

This window is very important. You must check to make sure each metadata field* that is being imported is matched to a collection field in the collection template.

Note: **Filename** is mapped to "**Object File Name**" not to the metadata field **File Name.**

Click on **Next**.

*(file names in example are based on old CDLC template)

Add Multiple Items - Map Metadata Fields

Click a collection field to map it to the imported field

Imported Fields	Collection Fields
Title	Title
Creator	Creator
Date of Original	Date of Original
Contributors	Contributors
Publisher of Original	Publisher of Original
Description	Description
Subject.LCSH	Subject.LCSH
Subject.TGM	Subject.TGM
Personal Name	Personal Name
Corporate Name	Corporate Name
Location	Location
CDLC DP Topic	CDLC DP Topic
Language	Language
Coverage	Coverage
Pubisher of Digital	Publisher of Digital
Date of Digital	Date of Digital
Format of Digital	Format of Digital
Digital Collection	Digital Collection
Holding Institution	Holding Institution
Contact Information	Contact Information
Rights	Rights
Technical Data	Technical Data
Transcript	Transcript
Filename	Object File Name

Encoding   < Back   Next >   Cancel

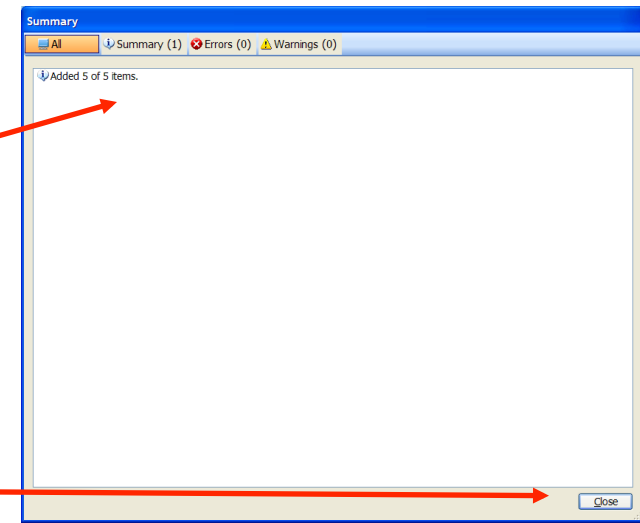**Add Multiple Items – Confirm Settings** window opens. Check the settings.

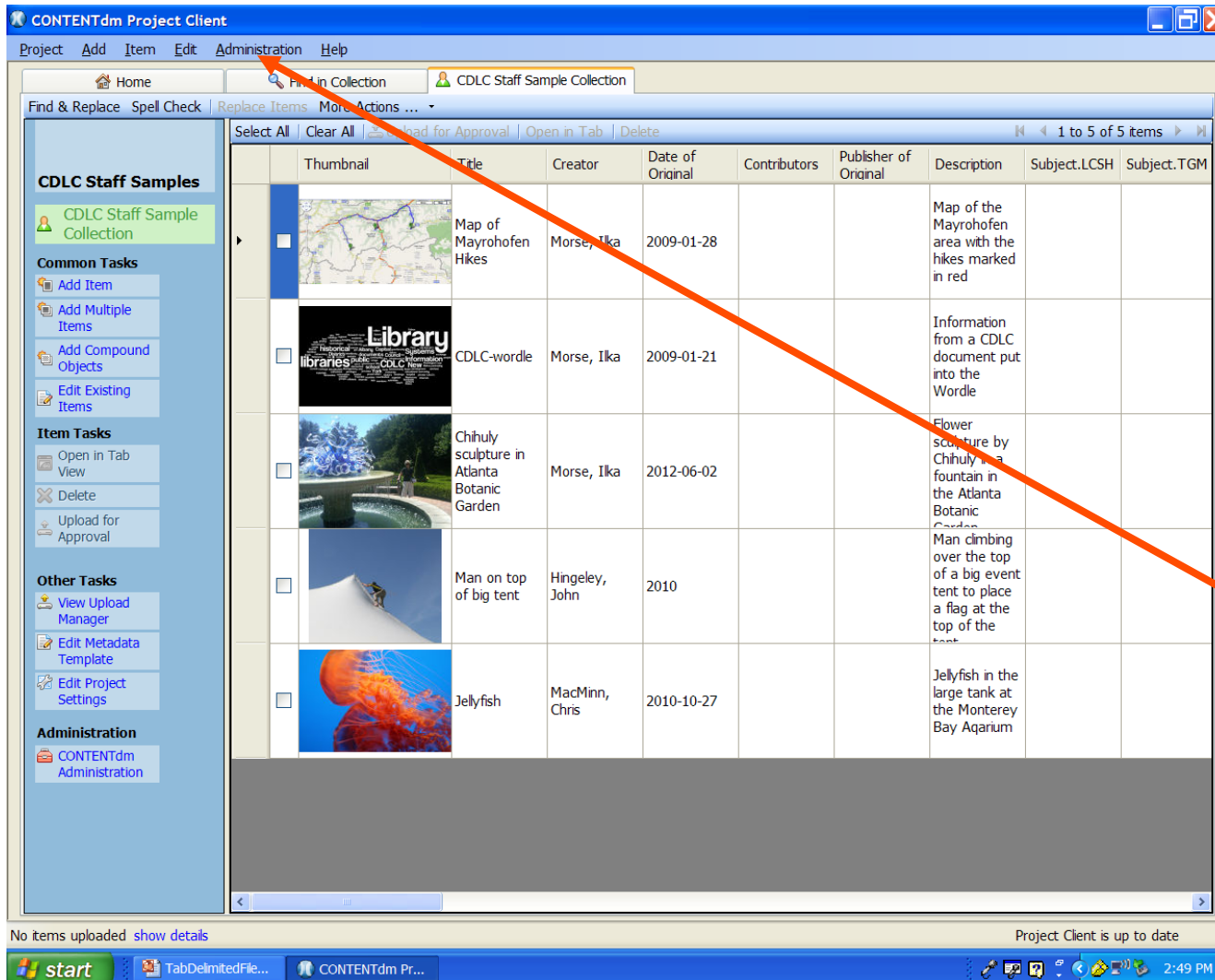Click on **Add Item.**

Progress window opens – shows items being added.
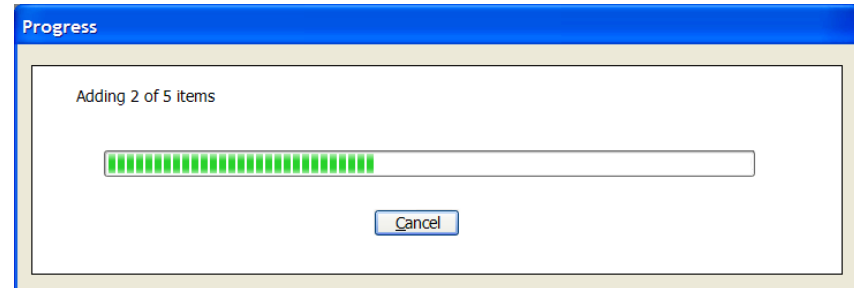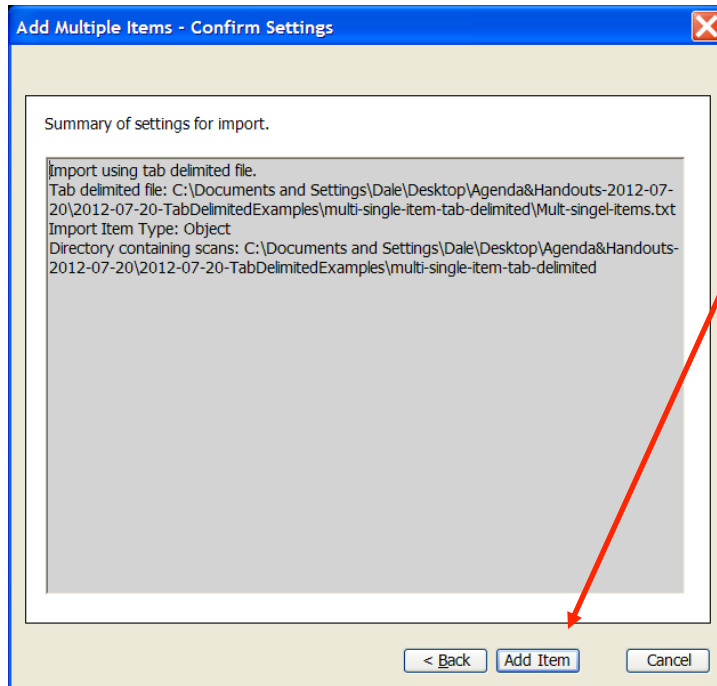
Summary window opens.

If there are no **Errors** or **Warnings** then click on **Close**.

The multiple items have been imported into the **Project Client** with their associated metadata.

Additional metadata can be added if needed.

<u>Click</u> on **Administration** to **upload**, **approve**, and **index** the items to the CONTENTdm server.