

Tab-Delimited File and Compound Object – Monographs (Not Postcards, Documents, or Cubes)

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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:

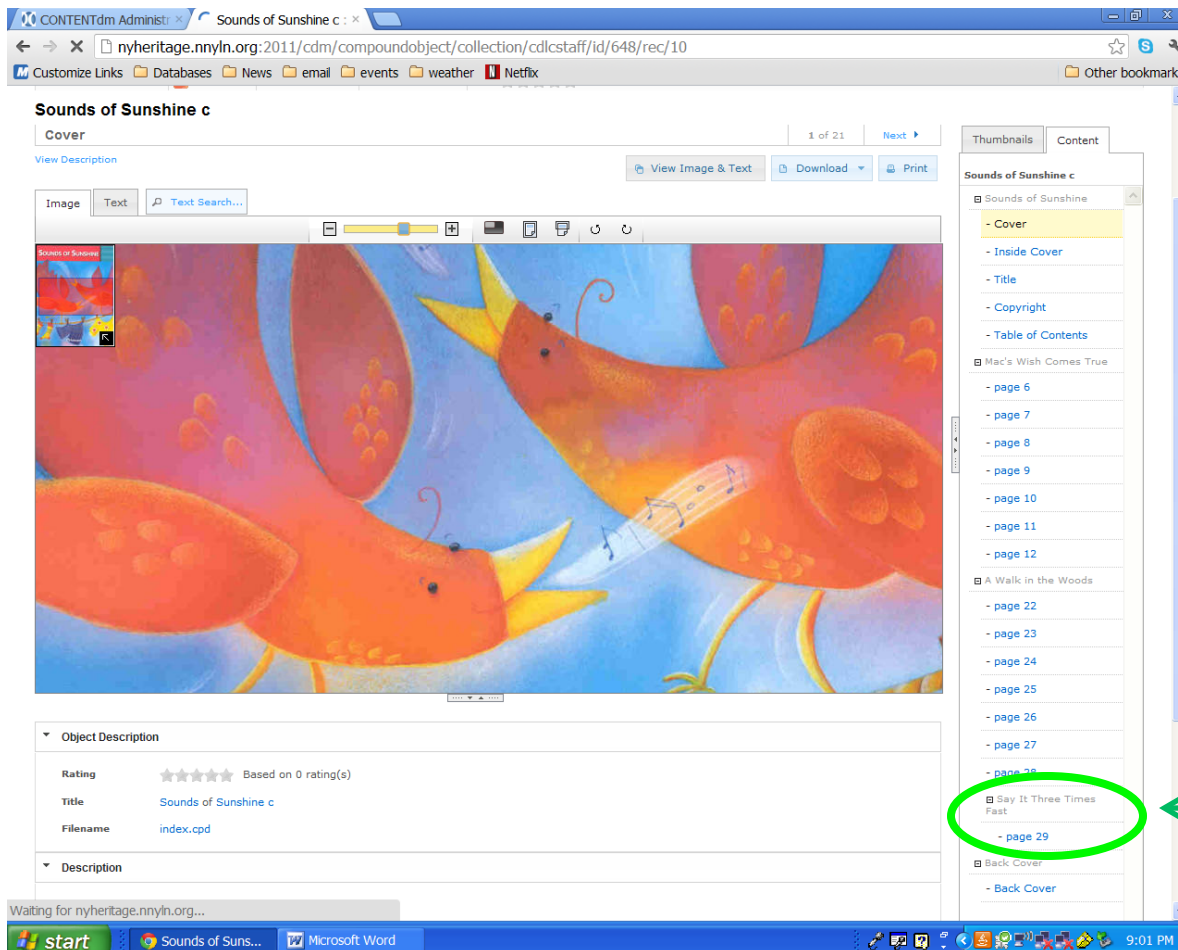
- **One Excel column must contain the file name of the images being imported and mapped to Object File Name** - Best practice, the field that contains the file names of the imported files is placed in the last field column used in the Excel file.
- **All object metadata** field names must appear in the first record of the file.
- 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 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: Compound Object - Monograph

This monograph has 3 chapters and one sub-chapter in chapter 3.

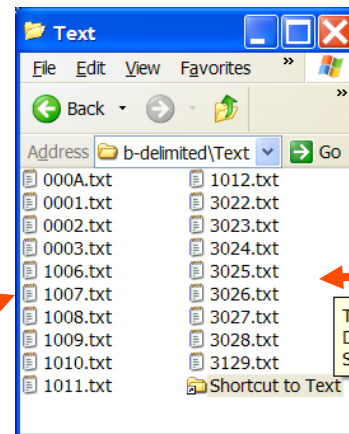
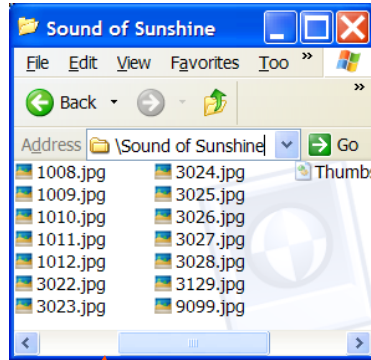
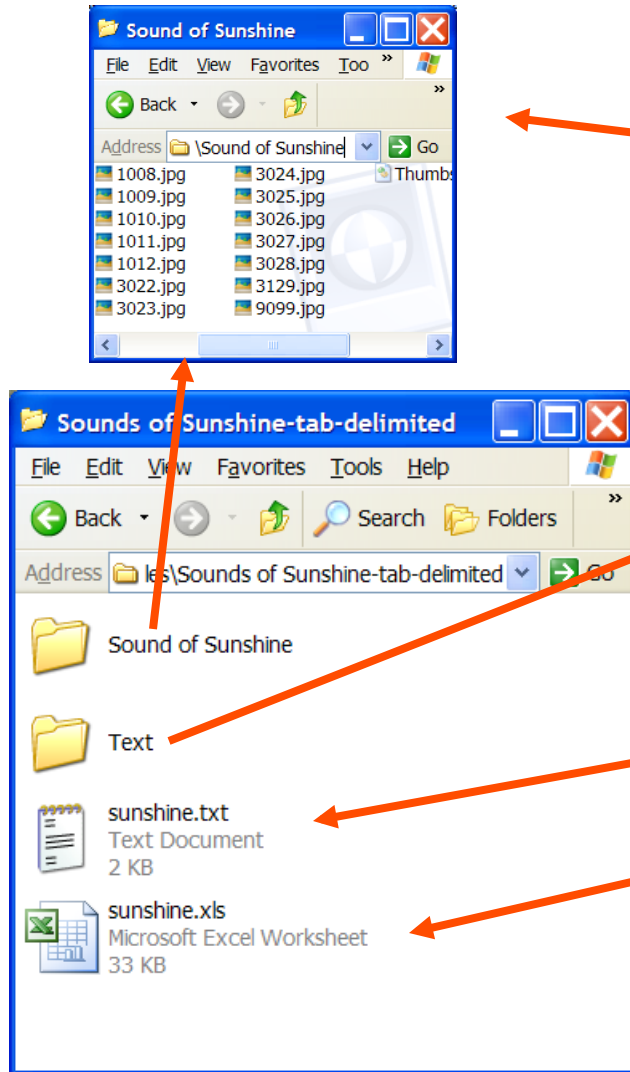


1

2

3

Folder setup for a monograph



Folder contains:

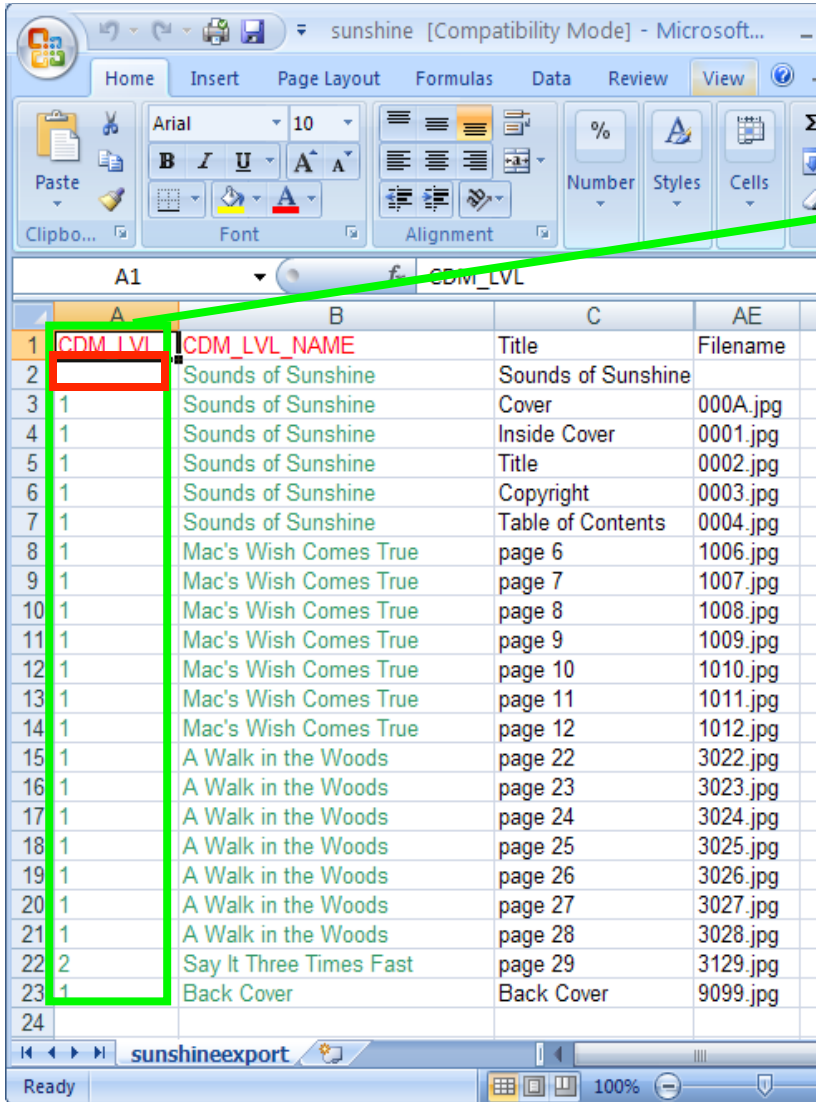
--Folder of images

--Folder of transcripts

--Tab-delimited file

--Excel file

Note: a folder containing the tiff files can also be in this folder.



CDM_LVL	CDM_LVL_NAME	Title	Filename
	Sounds of Sunshine	Sounds of Sunshine	
1	Sounds of Sunshine	Cover	000A.jpg
1	Sounds of Sunshine	Inside Cover	0001.jpg
1	Sounds of Sunshine	Title	0002.jpg
1	Sounds of Sunshine	Copyright	0003.jpg
1	Sounds of Sunshine	Table of Contents	0004.jpg
1	Mac's Wish Comes True	page 6	1006.jpg
1	Mac's Wish Comes True	page 7	1007.jpg
1	Mac's Wish Comes True	page 8	1008.jpg
1	Mac's Wish Comes True	page 9	1009.jpg
1	Mac's Wish Comes True	page 10	1010.jpg
1	Mac's Wish Comes True	page 11	1011.jpg
1	Mac's Wish Comes True	page 12	1012.jpg
1	A Walk in the Woods	page 22	3022.jpg
1	A Walk in the Woods	page 23	3023.jpg
1	A Walk in the Woods	page 24	3024.jpg
1	A Walk in the Woods	page 25	3025.jpg
1	A Walk in the Woods	page 26	3026.jpg
1	A Walk in the Woods	page 27	3027.jpg
1	A Walk in the Woods	page 28	3028.jpg
2	Say It Three Times Fast	page 29	3129.jpg
1	Back Cover	Back Cover	9099.jpg

Monograph: Needs two additional columns.

--The **first column**, labeled **CDM_LVL** in the first row.

This column indicates the **level** of the hierarchical structure in the monograph. CONTENTdm supports up to 9 levels in a monograph.

There is **NO** level of the hierarchical structure for the object metadata – thus **CDM_LVL** cell in row 2 is **blank**.

In this example: there are 2 levels of hierarchical structure – everything is level 1 except for the one sub-chapter.

	CDM_LVL	CDM_LVL_NAME	Title	Filename
2		Sounds of Sunshine	Sounds of Sunshine	
3	1	Sounds of Sunshine	Cover	000A.jpg
4	1	Sounds of Sunshine	Inside Cover	0001.jpg
5	1	Sounds of Sunshine	Title	0002.jpg
6	1	Sounds of Sunshine	Copyright	0003.jpg
7	1	Sounds of Sunshine	Table of Contents	0004.jpg
8	1	Mac's Wish Comes True	page 6	1006.jpg
9	1	Mac's Wish Comes True	page 7	1007.jpg
10	1	Mac's Wish Comes True	page 8	1008.jpg
11	1	Mac's Wish Comes True	page 9	1009.jpg
12	1	Mac's Wish Comes True	page 10	1010.jpg
13	1	Mac's Wish Comes True	page 11	1011.jpg
14	1	Mac's Wish Comes True	page 12	1012.jpg
15	1	A Walk in the Woods	page 22	3022.jpg
16	1	A Walk in the Woods	page 23	3023.jpg
17	1	A Walk in the Woods	page 24	3024.jpg
18	1	A Walk in the Woods	page 25	3025.jpg
19	1	A Walk in the Woods	page 26	3026.jpg
20	1	A Walk in the Woods	page 27	3027.jpg
21	1	A Walk in the Woods	page 28	3028.jpg
22	2	Say It Three Times Fast	page 29	3129.jpg
23	1	Back Cover	Back Cover	9099.jpg

The **second column** is labeled:
CDM_LVL_NAME in the first row.

This column contains the **title for each hierarchical structure of the monograph.** All records within the same level must contain the same **CDM_LVL_NAME**.

In this example: there are 4 different **Level 1** hierarchical structures— so four different titles. There is one **Level 2**, which has its own title too.

	A	B	C	AE	AF
1	CDM_LVL	CDM_LVL_NAME	Title	Filename	
2		Sounds of Sunshine	Sounds of Sunshine		
3	1	Sounds of Sunshine	Cover	000A.jpg	
4	1	Sounds of Sunshine	Inside Cover	0001.jpg	
5	1	Sounds of Sunshine	Title	0002.jpg	
6	1	Sounds of Sunshine	Copyright	0003.jpg	
7	1	Sounds of Sunshine	Table of Contents	0004.jpg	
8	1	Mac's Wish Comes True	page 6	1006.jpg	
9	1	Mac's Wish Comes True	page 7	1007.jpg	
10	1	Mac's Wish Comes True	page 8	1008.jpg	
11	1	Mac's Wish Comes True	page 9	1009.jpg	
12	1	Mac's Wish Comes True	page 10	1010.jpg	
13	1	Mac's Wish Comes True	page 11	1011.jpg	
14	1	Mac's Wish Comes True	page 12	1012.jpg	
15	1	A Walk in the Woods	page 22	3022.jpg	
16	1	A Walk in the Woods	page 23	3023.jpg	
17	1	A Walk in the Woods	page 24	3024.jpg	
18	1	A Walk in the Woods	page 25	3025.jpg	
19	1	A Walk in the Woods	page 26	3026.jpg	
20	1	A Walk in the Woods	page 27	3027.jpg	
21	1	A Walk in the Woods	page 28	3028.jpg	
22	2	Say It Three Times Fast	page 29	3129.jpg	
23	1	Back Cover	Back Cover	9099.jpg	
24					

The **third column** contains the **titles for the object and each page of the object.**

The **last column** contains the image file names (mapped to “Object File Name”) that make up the object.

Remember, the object metadata row does not have an image file so it is **blank**.

Monograph – Excel file - Rows

1	CDM_LVL	CDM_LVL_NAME	Title	Filename
2		Sounds of Sunshine	Sounds of Sunshine	
3	1	Sounds of Sunshine	Cover	000A.jpg
4	1	Sounds of Sunshine	Inside Cover	0001.jpg
5	1	Sounds of Sunshine	Title	0002.jpg
6	1	Sounds of Sunshine	Copyright	0003.jpg
7	1	Sounds of Sunshine	Table of Contents	0004.jpg
8	1	Mac's Wish Comes True	page 6	1006.jpg
9	1	Mac's Wish Comes True	page 7	1007.jpg
10	1	Mac's Wish Comes True	page 8	1008.jpg
11	1	Mac's Wish Comes True	page 9	1009.jpg
12	1	Mac's Wish Comes True	page 10	1010.jpg
13	1	Mac's Wish Comes True	page 11	1011.jpg
14	1	Mac's Wish Comes True	page 12	1012.jpg
15	1	A Walk in the Woods	page 22	3022.jpg
16	1	A Walk in the Woods	page 23	3023.jpg
17	1	A Walk in the Woods	page 24	3024.jpg
18	1	A Walk in the Woods	page 25	3025.jpg
19	1	A Walk in the Woods	page 26	3026.jpg
20	1	A Walk in the Woods	page 27	3027.jpg
21	1	A Walk in the Woods	page 28	3028.jpg
22	2	Say It Three Times Fast	page 29	3129.jpg
23	1	Back Cover	Back Cover	9099.jpg
24				

The **first row** contains the **COM_LVL** in **cell 1** and **CDM_LVL_NAME** in **cell 2** with the names of the metadata fields for the metadata being imported following.

All cells are formatted as text. The first row must contain **Title** and **File Name** fields.

Monograph – Excel file - Rows

	A	B	C	AE	AF
1	CDM_LVL	CDM_LVL NAME	Title	Filename	
2		Sounds of Sunshine	Sounds of Sunshine		
3	1	Sounds of Sunshine	Cover	000A.jpg	
4	1	Sounds of Sunshine	Inside Cover	0001.jpg	
5	1	Sounds of Sunshine	Title	0002.jpg	
6	1	Sounds of Sunshine	Copyright	0003.jpg	
7	1	Sounds of Sunshine	Table of Contents	0004.jpg	
8	1	Mac's Wish Comes True	page 6	1006.jpg	
9	1	Mac's Wish Comes True	page 7	1007.jpg	
10	1	Mac's Wish Comes True	page 8	1008.jpg	
11	1	Mac's Wish Comes True	page 9	1009.jpg	
12	1	Mac's Wish Comes True	page 10	1010.jpg	
13	1	Mac's Wish Comes True	page 11	1011.jpg	
14	1	Mac's Wish Comes True	page 12	1012.jpg	
15	1	A Walk in the Woods	page 22	3022.jpg	
16	1	A Walk in the Woods	page 23	3023.jpg	
17	1	A Walk in the Woods	page 24	3024.jpg	
18	1	A Walk in the Woods	page 25	3025.jpg	
19	1	A Walk in the Woods	page 26	3026.jpg	
20	1	A Walk in the Woods	page 27	3027.jpg	
21	1	A Walk in the Woods	page 28	3028.jpg	
22	2	Say It Three Times Fast	page 29	3129.jpg	
23	1	Back Cover	Back Cover	9099.jpg	
24					

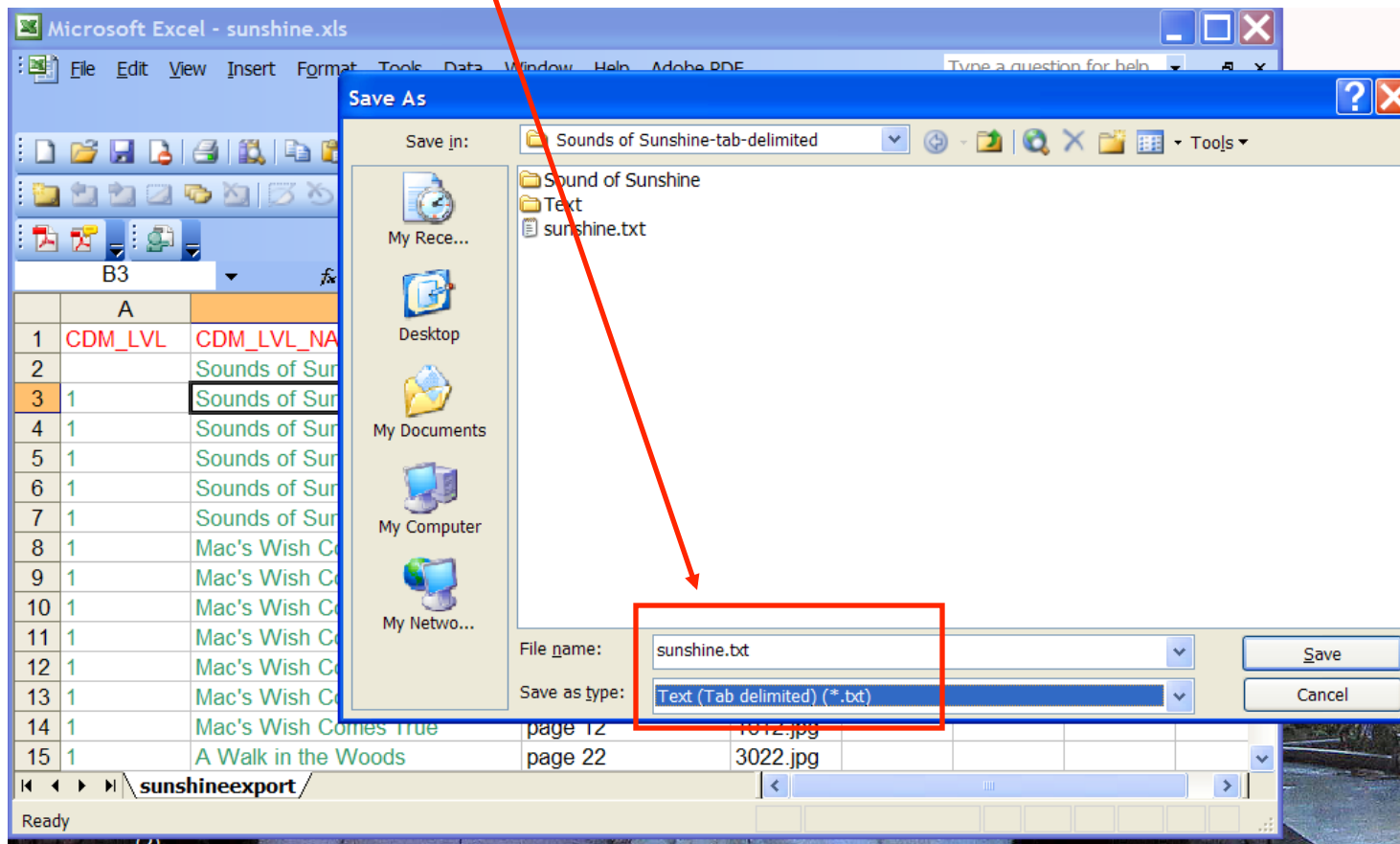
The **second row** of the excel file contains the **object metadata**.

There is **NO** level of the hierarchical structure for the object metadata – thus **CDM_LVL** cell in row 2 is **blank**

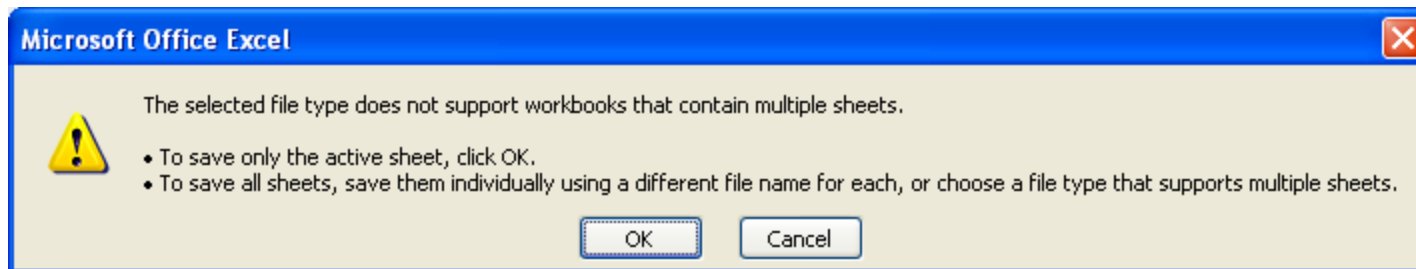
There is **NO** image file for the object metadata – thus the **File Name** cell in row 2 is **blank**.

- The thumbnail will be created for the compound object by using the first image file in the **File Name** column.

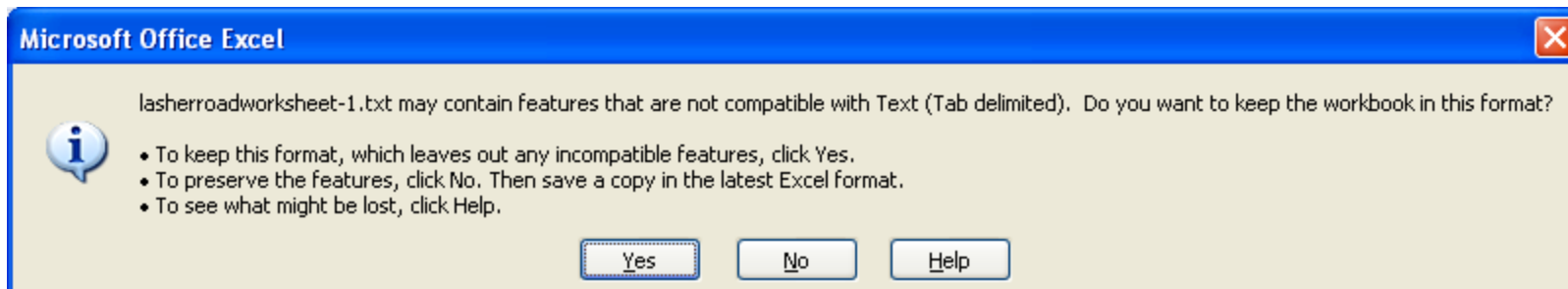
Once the Excel file is created, completed, and saved as an Excel file, **save the file again as a Tab-delimited file (txt).**



Note: Tab-delimited format does not support Excel workbooks that contain multiple worksheets. To save the active workbook sheet (the sheet you have open) click on **OK**.



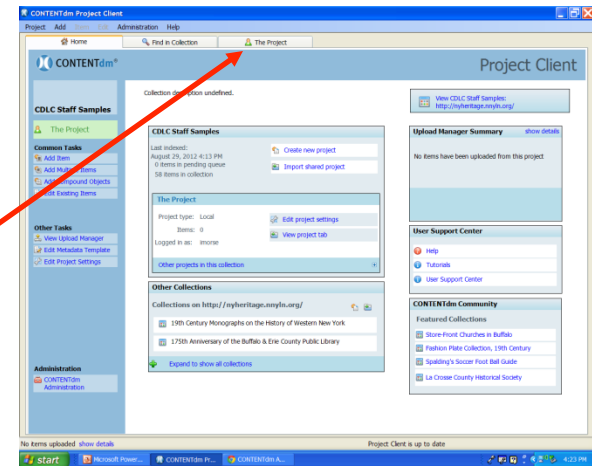
You want the worksheet in Tab-delimited format, so click on **Yes**.



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. **It is best not to work in the Tab-delimited file.**

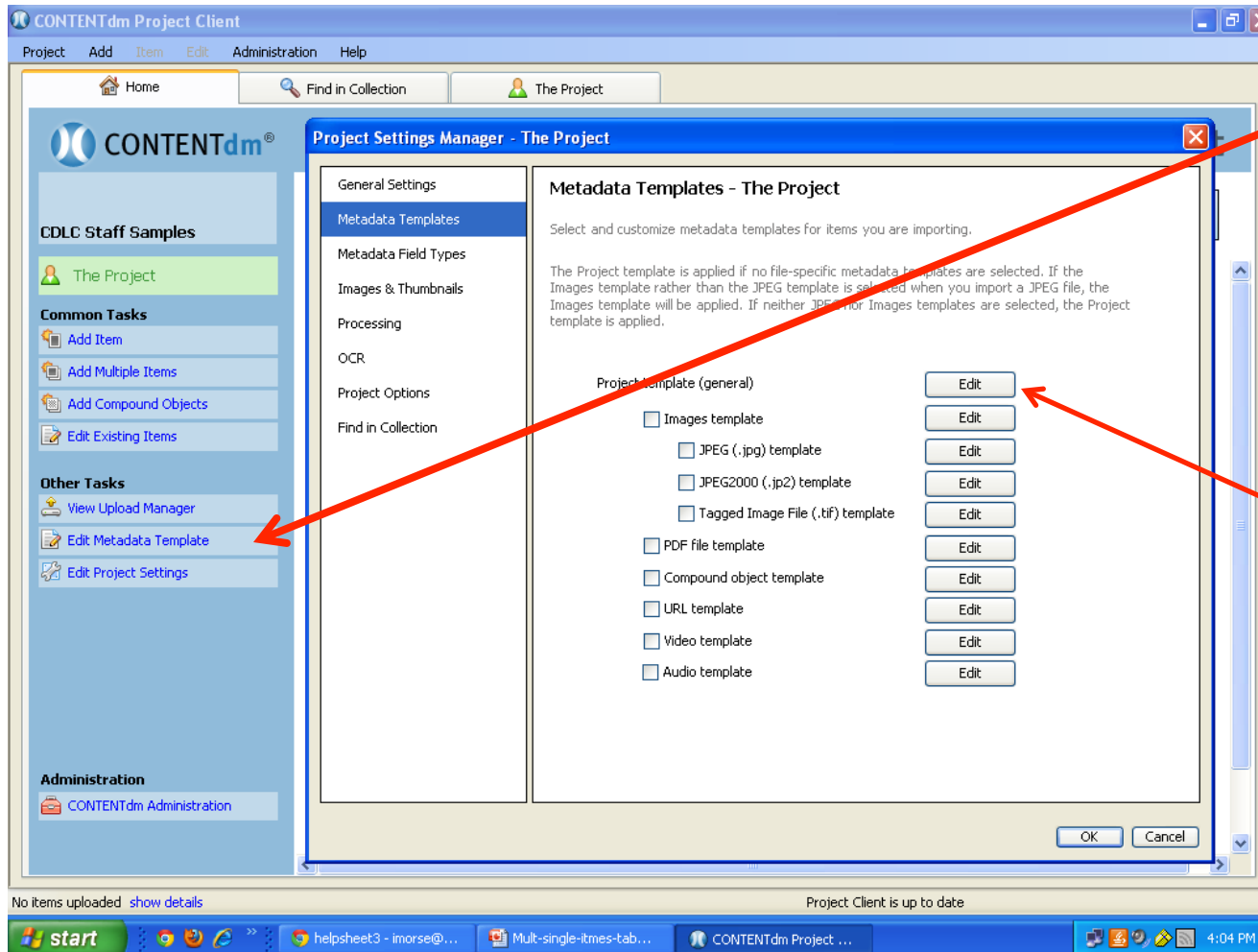
Import Tab-delimited file into CONTENTdm Project Client

- Open **CONTENTdm Project Client**.
- Open **Project** or create a **new Project**.
- The **Project** tab view opens.



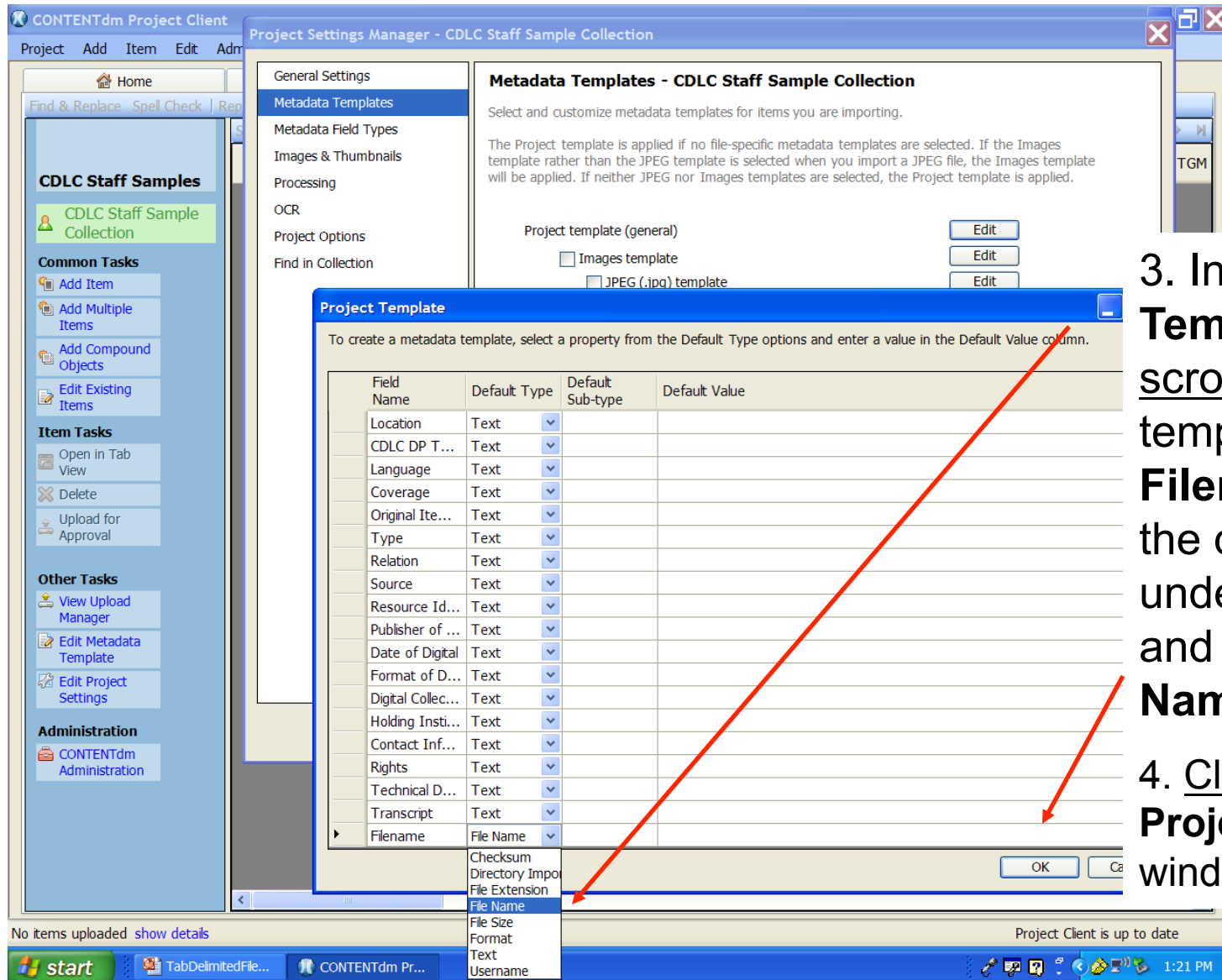
- The next 5 steps are very important because the **File Name** field in the tab-delimited file will be mapped to “**Object File Name**” not to the metadata field **File Name**. The items being imported into **CONTENTdm Project Client** will not be uploaded to the **CONTENTdm server** without the **File Name** metadata field information for New York Heritage collections.

To automatically collect the File Name metadata information follow the next 5 steps.



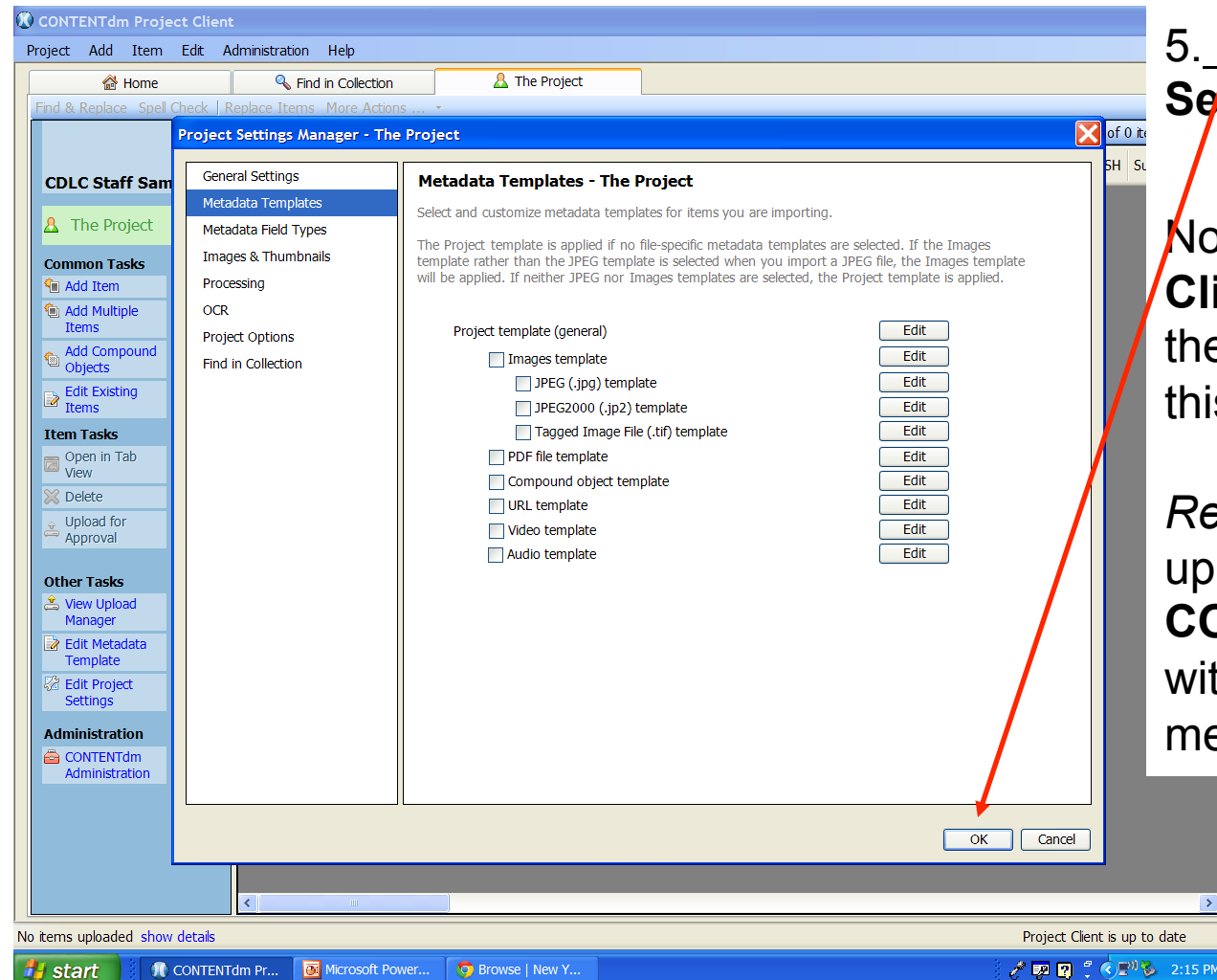
1. Click on **Edit Metadata Template** – the **Project Settings Manager** window opens.

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



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

4. Click on **Ok** in the **Project Template** window.

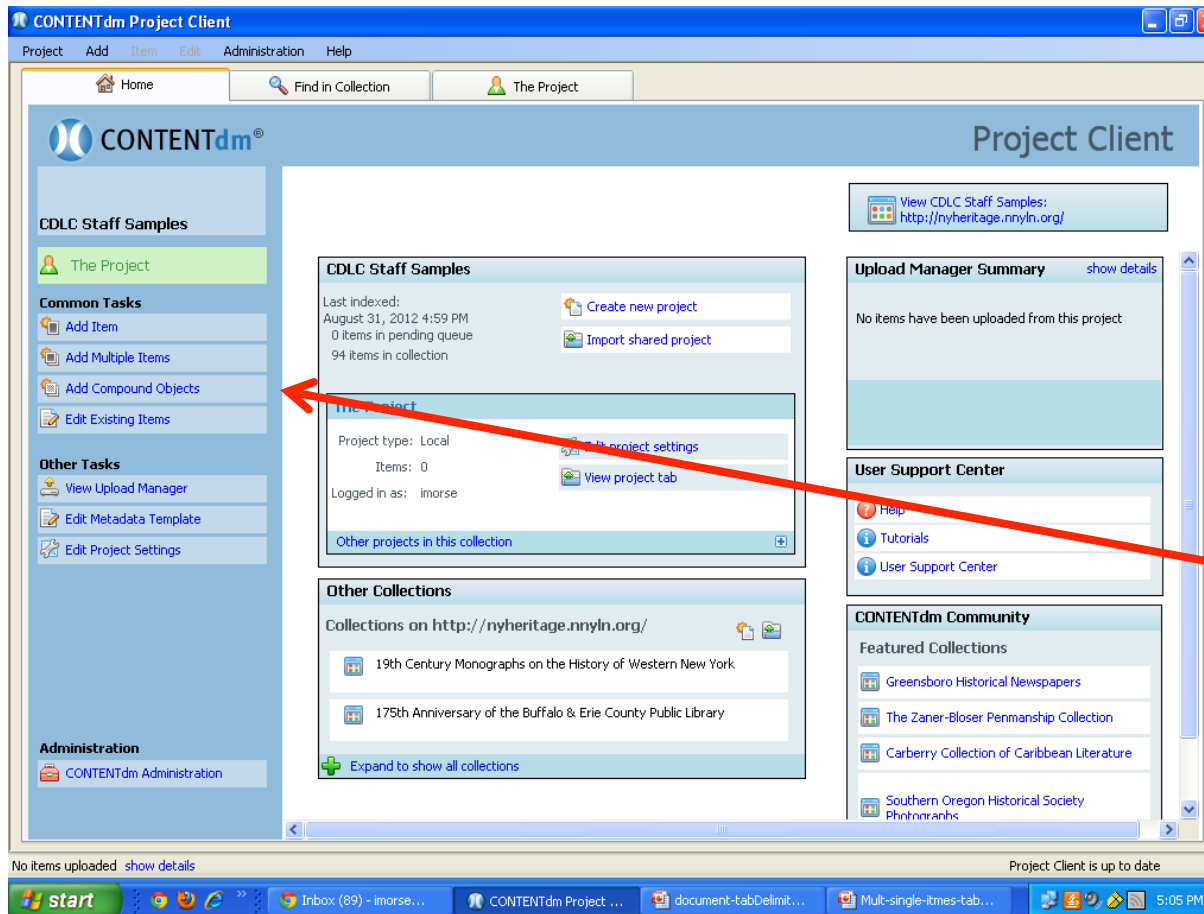


5. Click on **Ok** in the **Project Settings Manager** window.

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

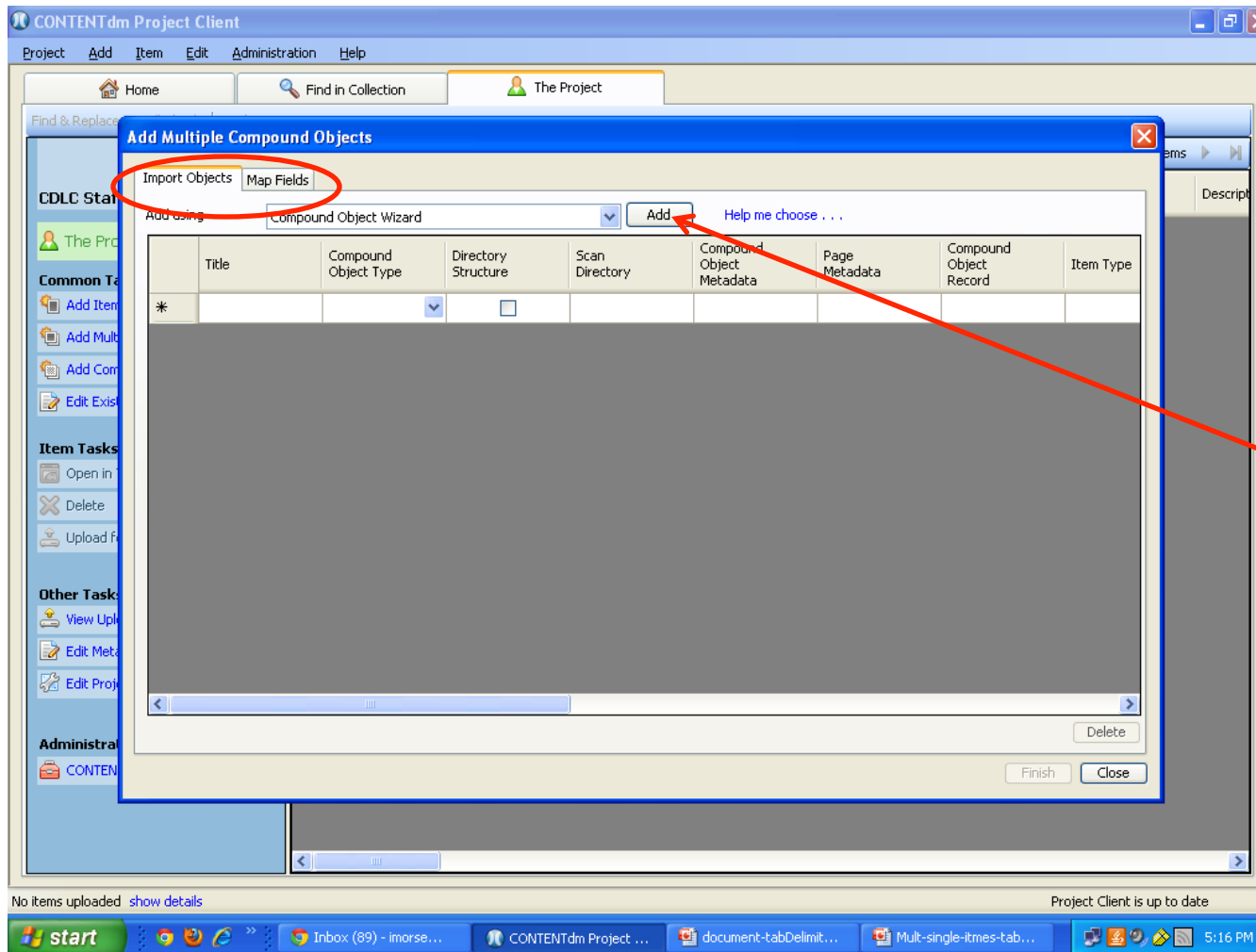
Remember, items will not be uploaded to the **CONTENTdm server** without the **File Name** metadata field information.

Import Files



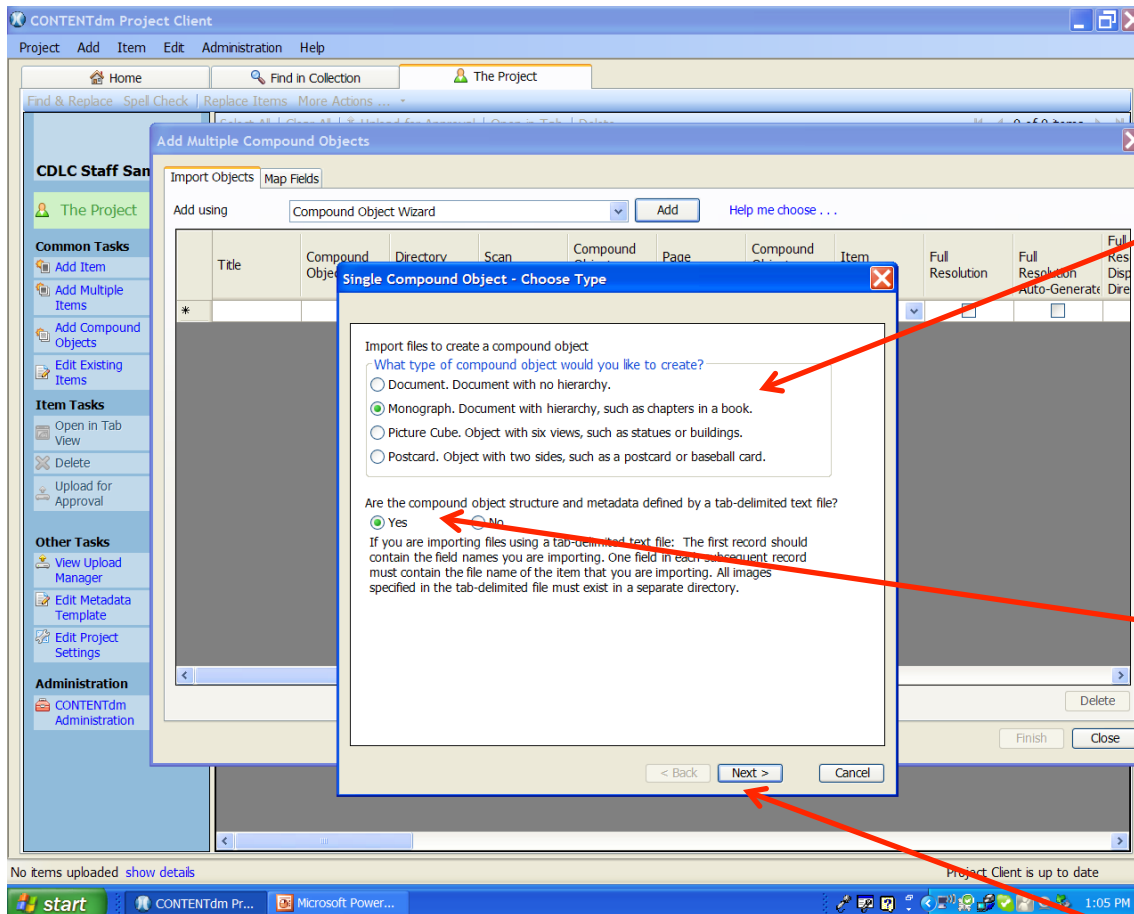
You are now back in the **Project tab** view and ready to **import the Tab-delimited file, the monograph, and the transcript files.**

Click on Add Compound Objects.



The **Add Multiple Compound Objects** window opens in the **Import Objects** tab view.

Click on **Add** using the **Compound Object Wizard**.

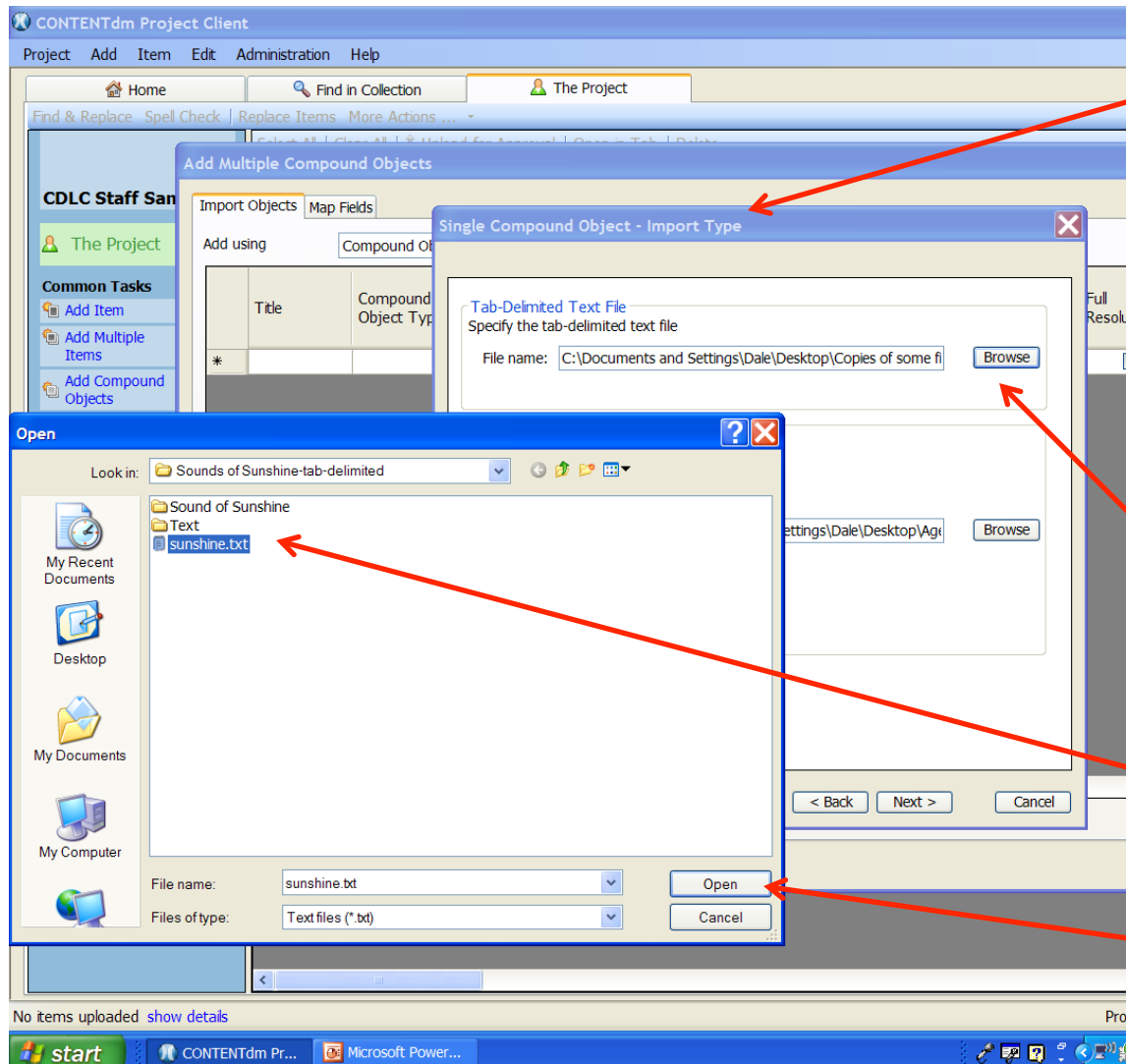


The **Single Compound Object – Choose Type** window opens.

Under, **Import files to create a compound object**, select Monograph, Document with hierarchy, such as chapters in a book.

Select Yes, for **Are the compound object structure and metadata defined by a tab-delimited text file?**

Click on Next.



The **Single Compound Object – Import Type** window opens.

In the **Tab-Delimited Text File** section of the window.

Click on **Browse** and find the tab-delimited file for this object.

Highlight the tab-delimited file.

Click on **Open**.

Back in the **Single Compound Object – Import Type** window

go to the **Item Type** section, and under **What do you want to import?**

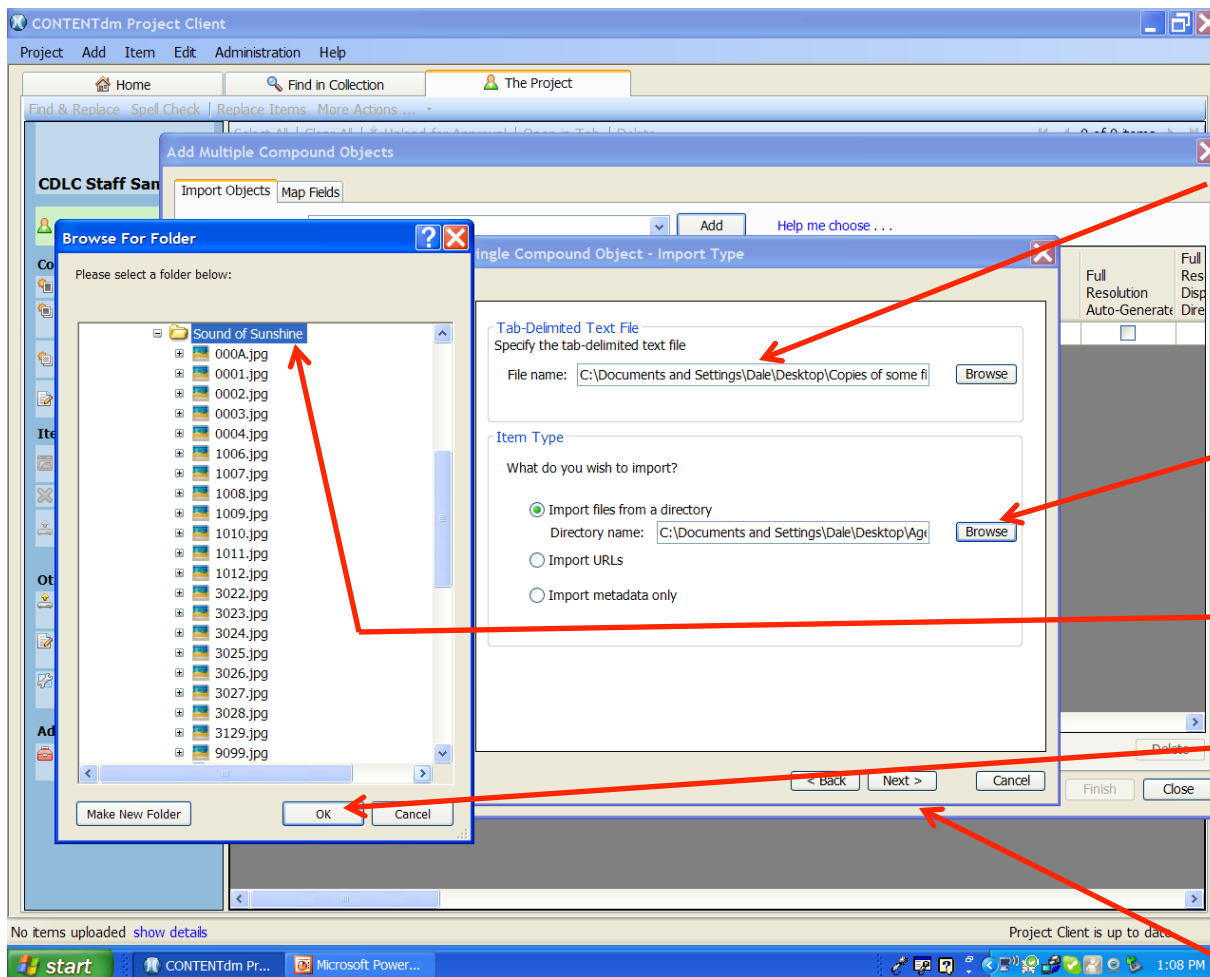
Select Import from a directory.

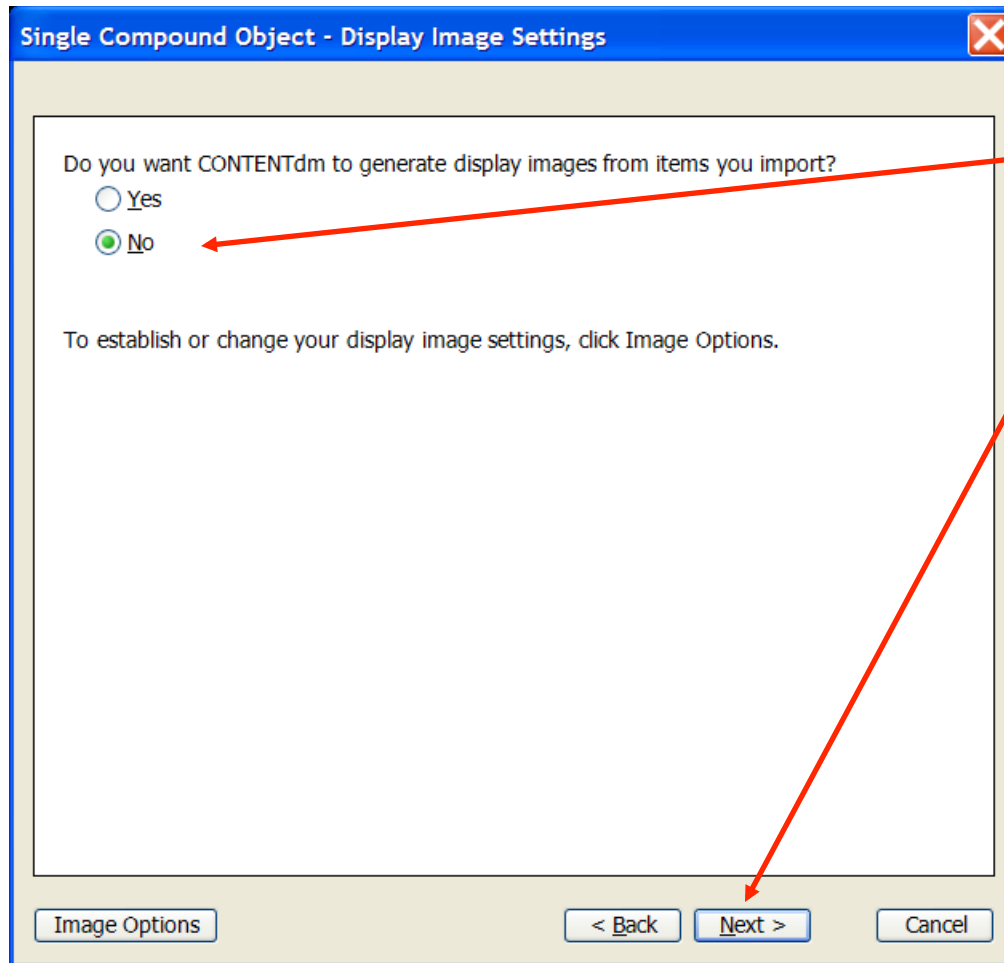
Click on Browse to find the object files.

Highlight the name of the file folder.

Click on OK

Click on Next in the **Single Compound Object – Import Type** window.



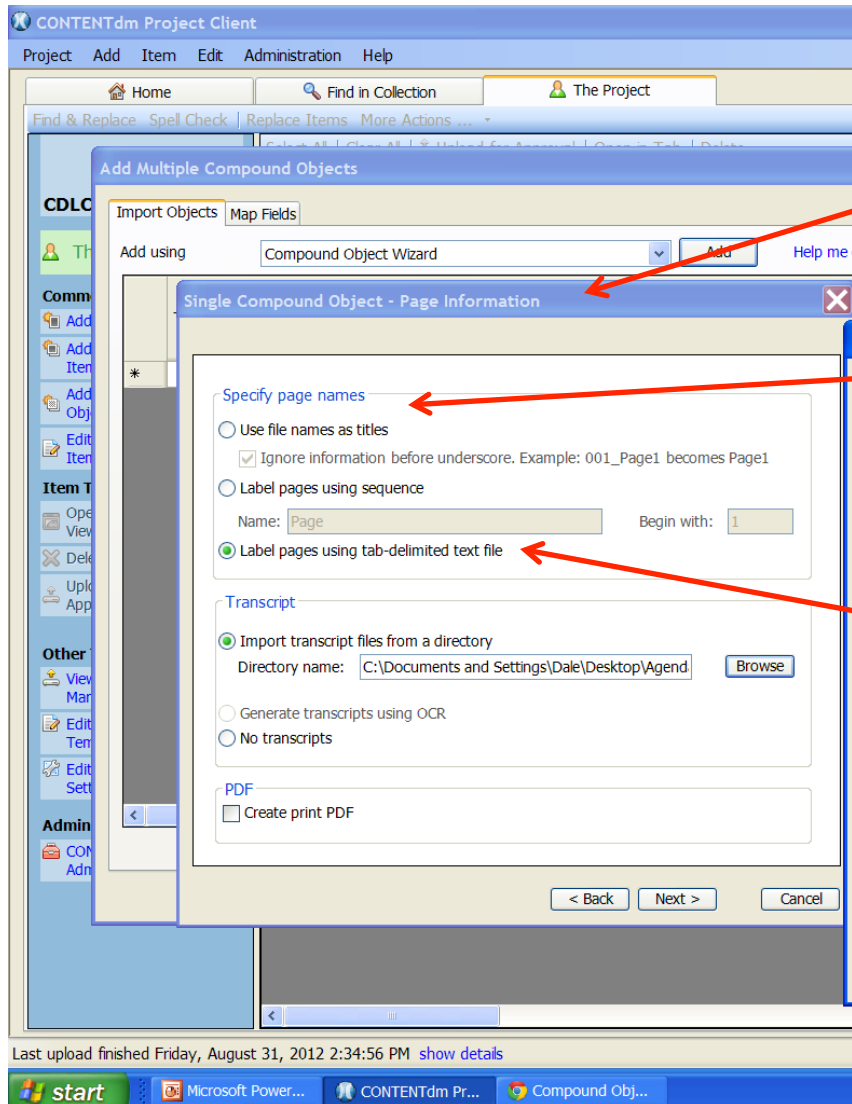


The **Add Multiple Items – Display Image Settings** window opens.

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 **Single Compound Object – Page Information** window opens.

Under **Specify page names** section,

for this example,

select **Label pages using tab-delimited txt file**

Our document example has transcript files so,
Under the **Transcript** section of this window,

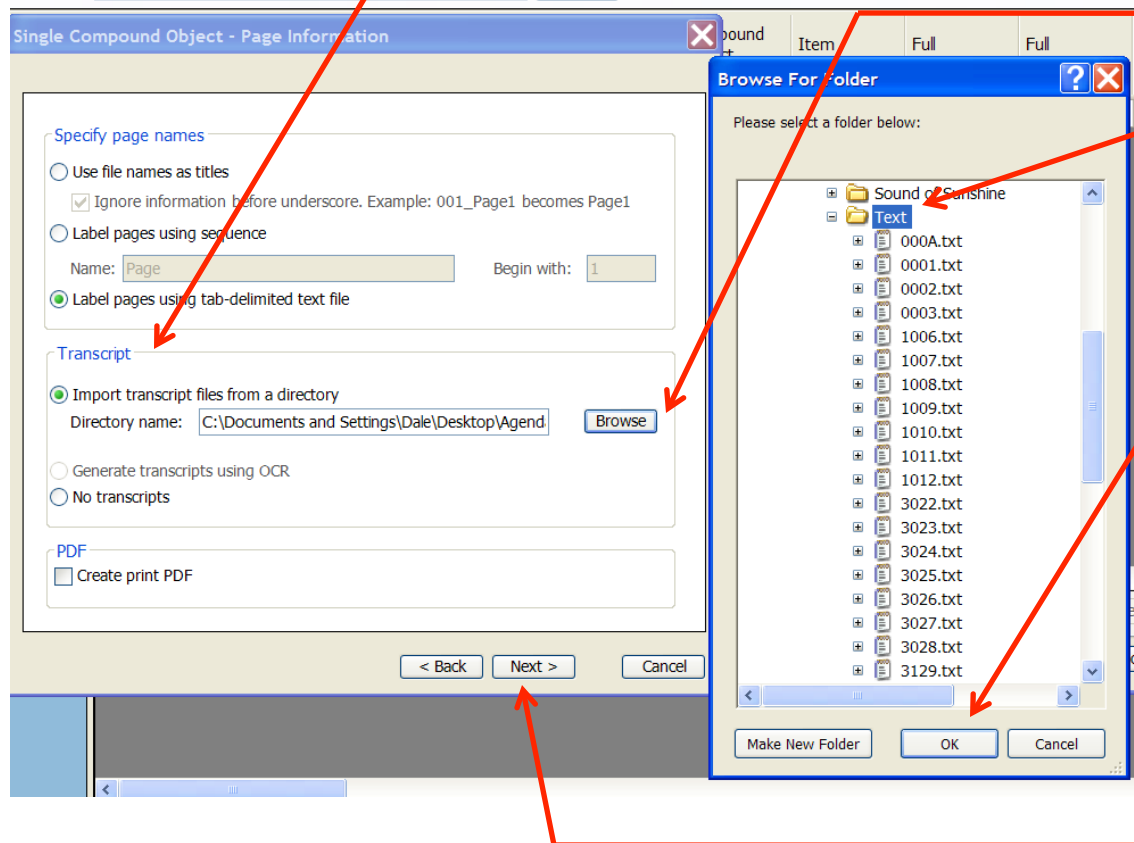
Select **Import transcript files from a directory.**

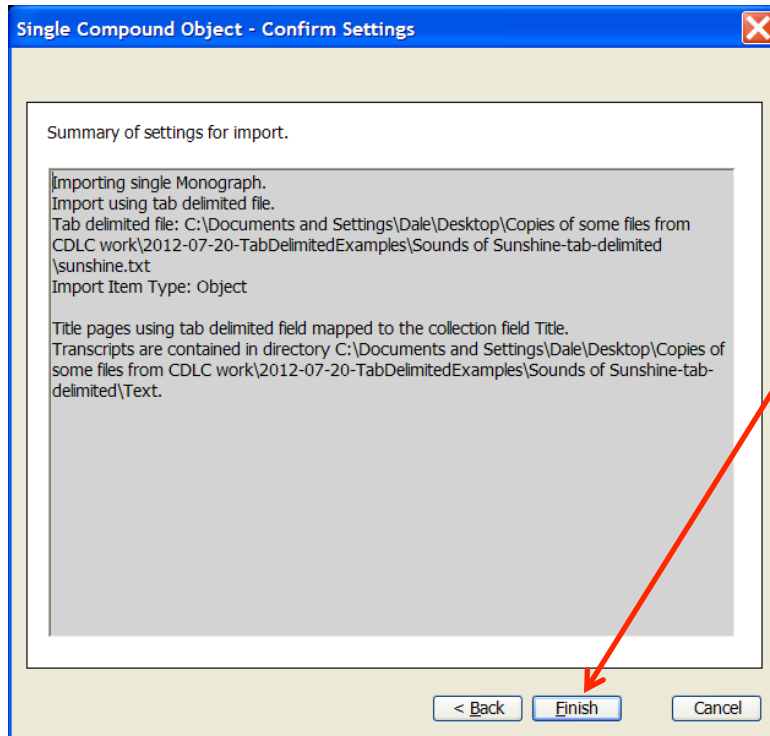
Click on **Browse.**

Find the folder with the transcript files, highlight the folder and click on **OK.**

(Note: If the document does not have any transcripts then select **No transcripts.**)

Click on **Next** back in the **Single Compound Object – Page Information** window.

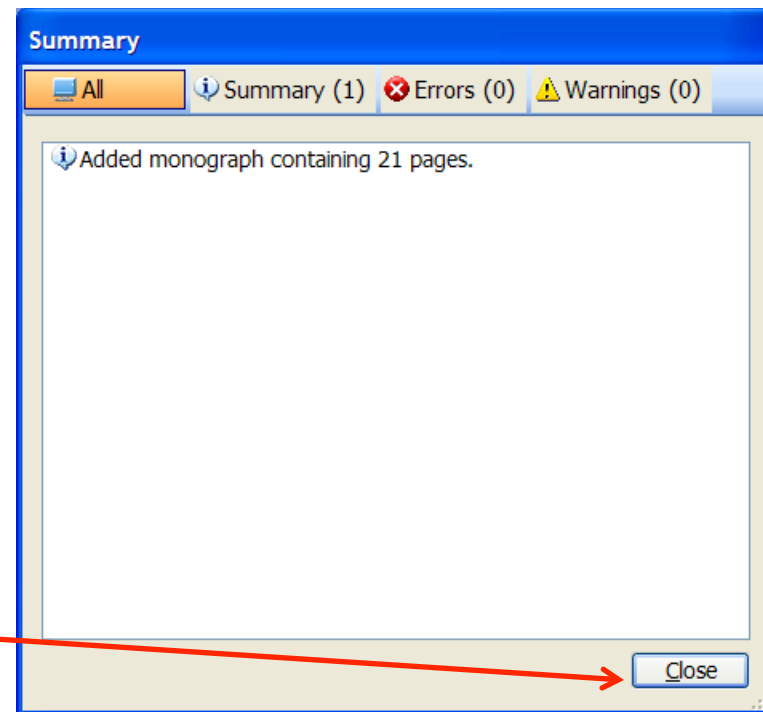




The **Single Compound Object – Confirm Settings** window opens.

Check the settings.

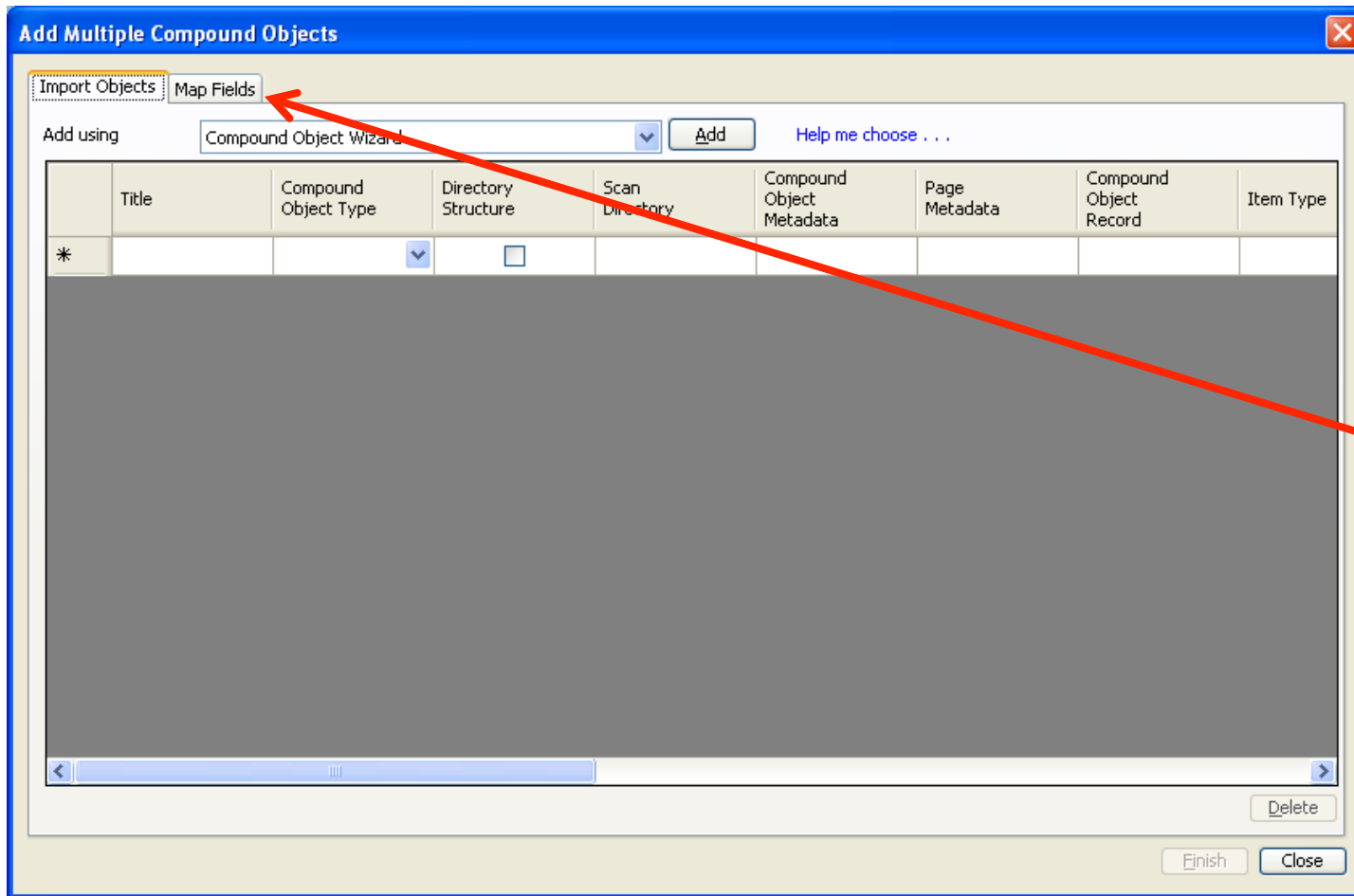
Click on **Finish**.



Summary window opens.

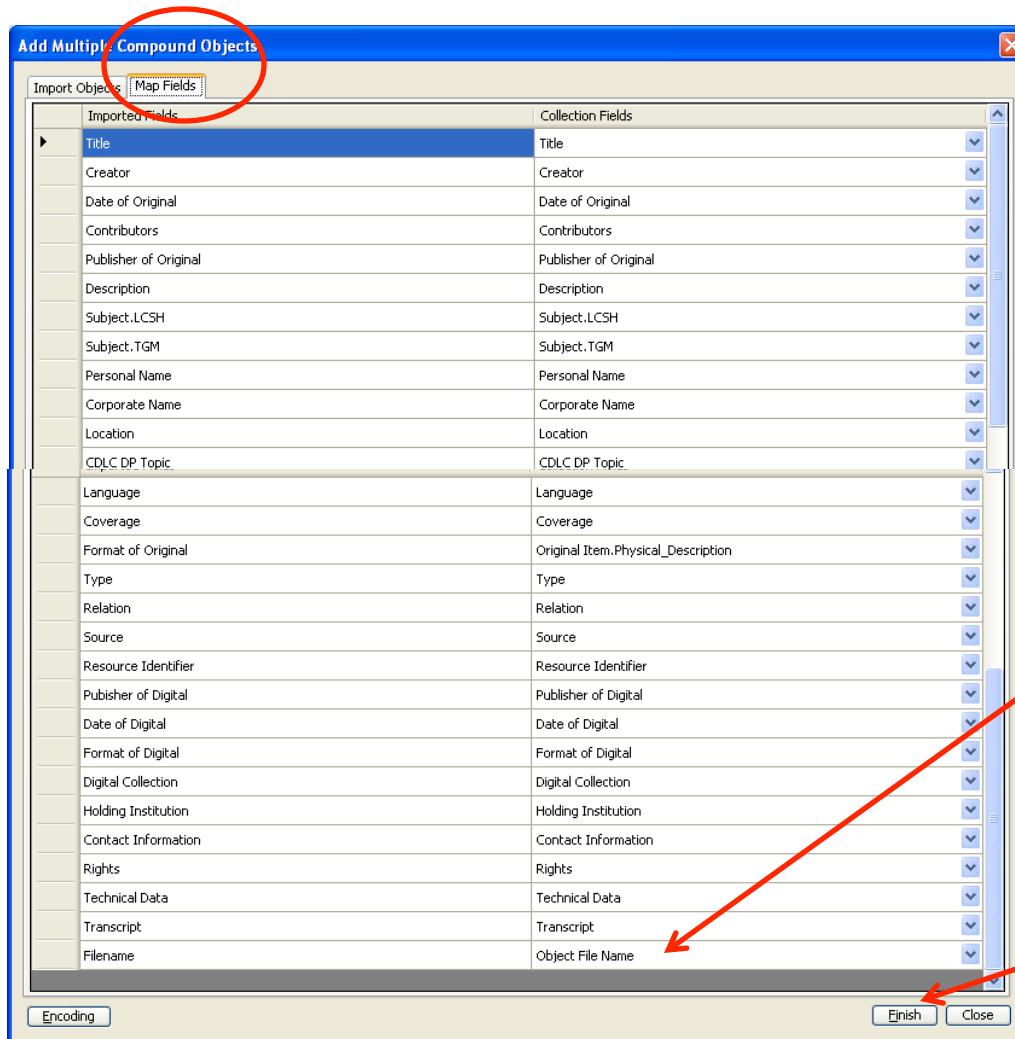
If there are no **Errors** or **Warnings** then click on **Close**.

Map Metadata Fields



The **Add Multiple Compound Objects** window opens.

Click on the **Map Fields** tab.



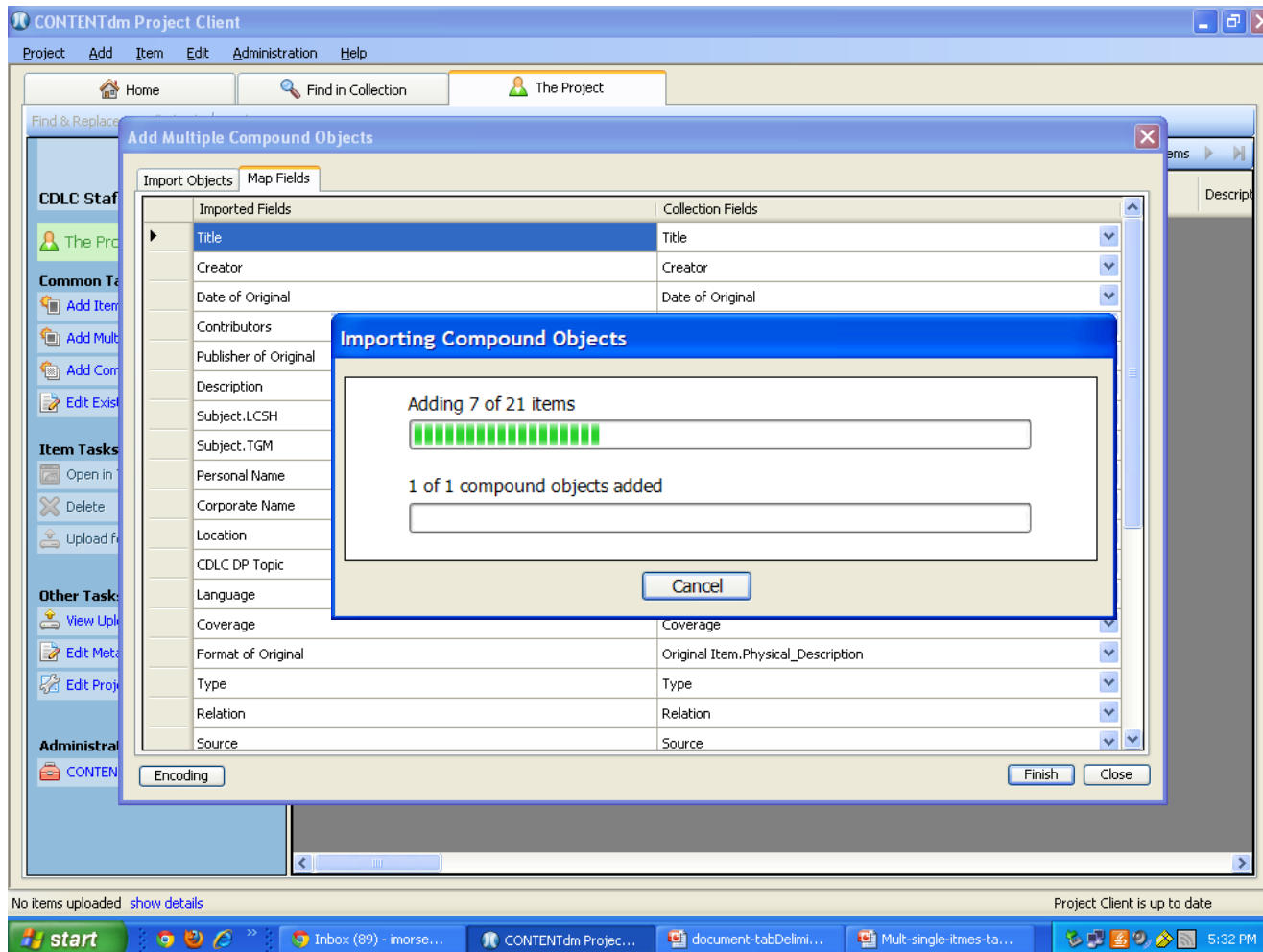
You are now in the **Add Multiple Items – Map Fields** tab view.

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.

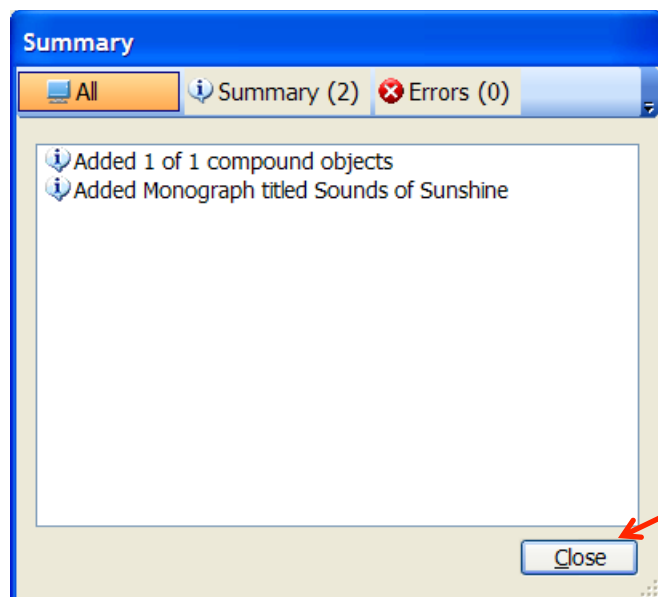
Note: **Filename** is mapped to “**Object File Name**” not to the metadata field **File Name**.

Click on **Finish**.

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



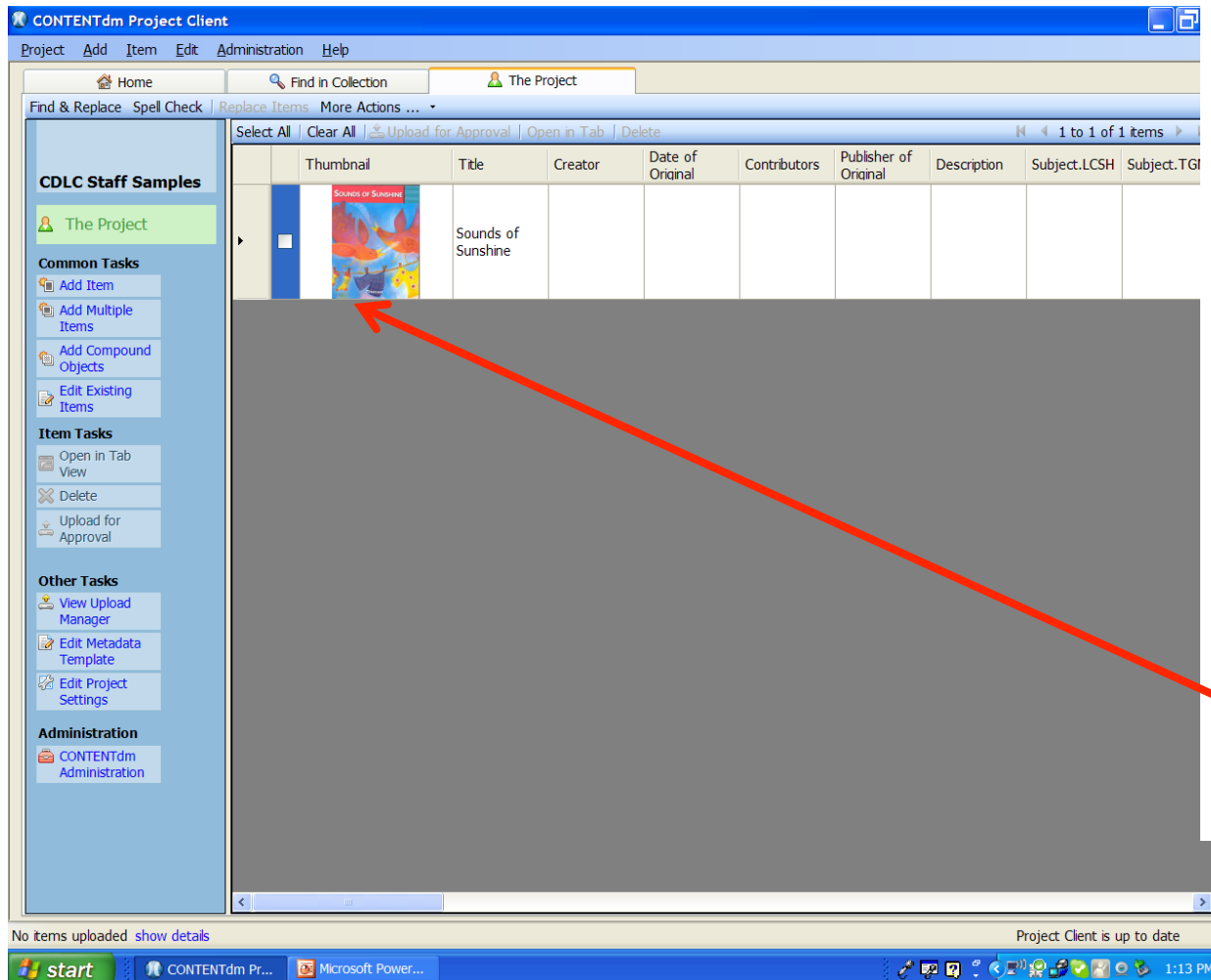
The
Importing
Compound
Objects
progress bar
window
opens.



Summary window
opens.

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

In the spreadsheet view of the Project Client:

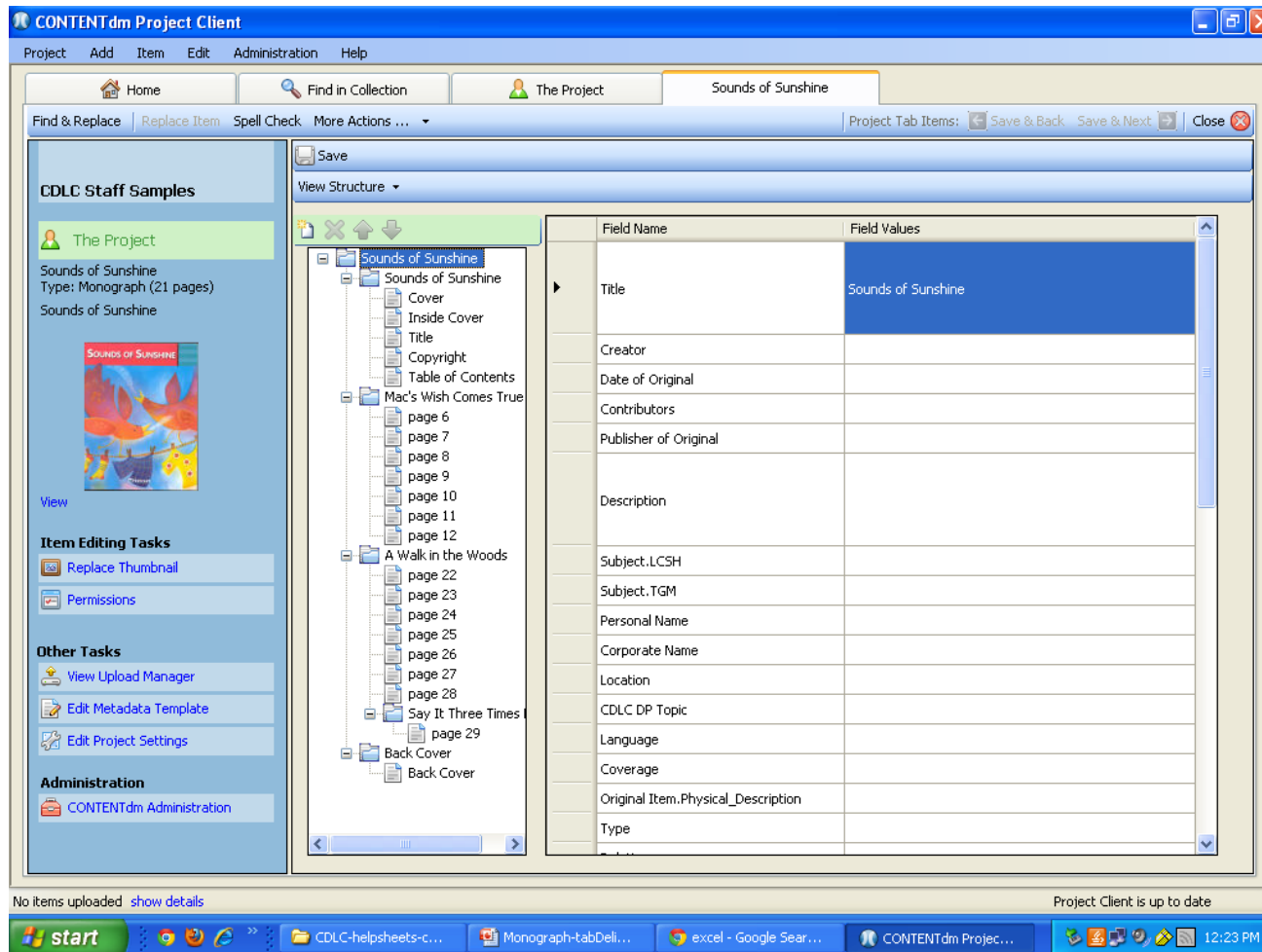


The document (a compound object) has been imported into the **Project Client** with all its associated metadata.

Additional metadata can be added if needed.

Double click the **thumbnail** of the document.

Views of the structure of the compound object:



The screenshot shows the CONTENTdm Project Client interface. The main window displays the 'View Structure' of a compound object named 'Sounds of Sunshine'. The structure is a tree view showing the following hierarchy:

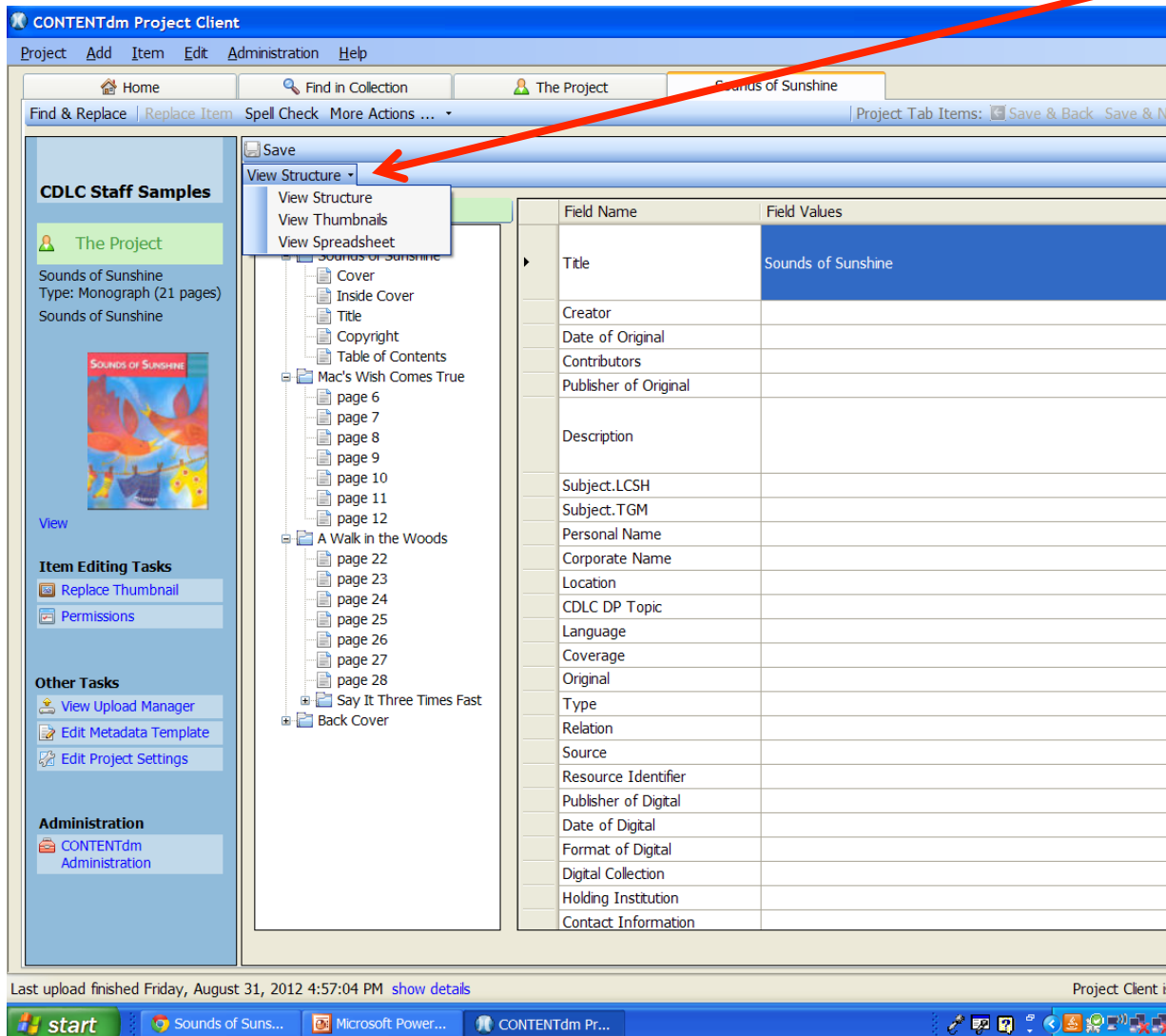
- Sounds of Sunshine
 - Cover
 - Inside Cover
 - Title
 - Copyright
 - Table of Contents
 - Mac's Wish Comes True
 - page 6
 - page 7
 - page 8
 - page 9
 - page 10
 - page 11
 - page 12
 - A Walk in the Woods
 - page 22
 - page 23
 - page 24
 - page 25
 - page 26
 - page 27
 - page 28
 - Say It Three Times
 - page 29
 - Back Cover
 - Back Cover

To the right of the tree view is a table showing the metadata for the selected item:

Field Name	Field Values
Title	Sounds of Sunshine
Creator	
Date of Original	
Contributors	
Publisher of Original	
Description	
Subject.LCSH	
Subject.TGM	
Personal Name	
Corporate Name	
Location	
CDLC DP Topic	
Language	
Coverage	
Original Item.Physical_Description	
Type	

The interface also includes a sidebar with 'CDLC Staff Samples', 'The Project' information, and various task buttons like 'Replace Thumbnail', 'Permissions', 'View Upload Manager', 'Edit Metadata Template', 'Edit Project Settings', and 'CONTENTdm Administration'. The bottom status bar shows 'No items uploaded' and 'Project Client is up to date'.

This is the **View Structure** of the compound object.



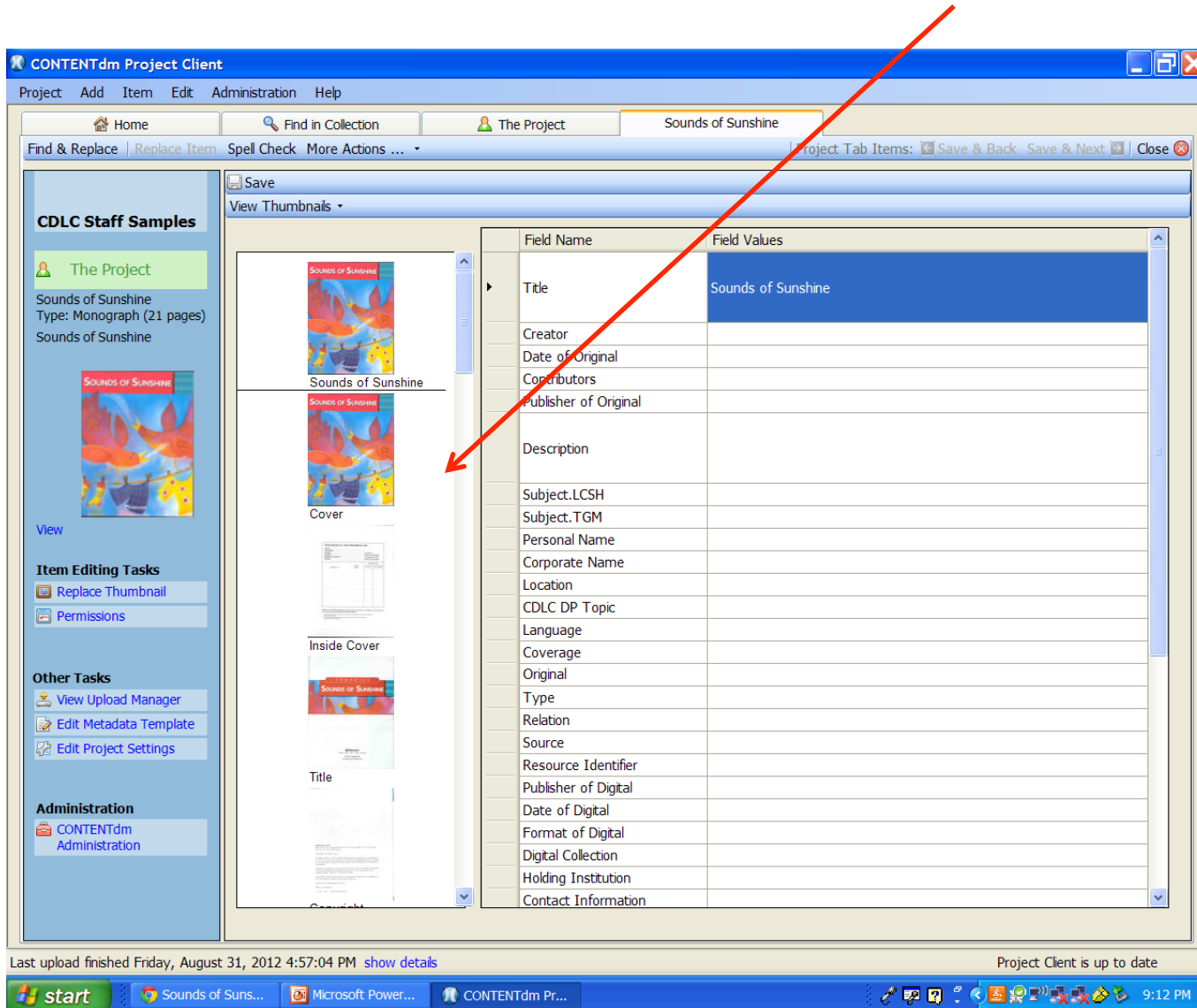
Click on **View Structure**.

There are three views of the structure of the compound object:

- View Structure**
- View Thumbnail**
- View Spreadsheet**

Metadata for the object and page metadata records can be added in any of these three structure views.

Thumbnail structure view:

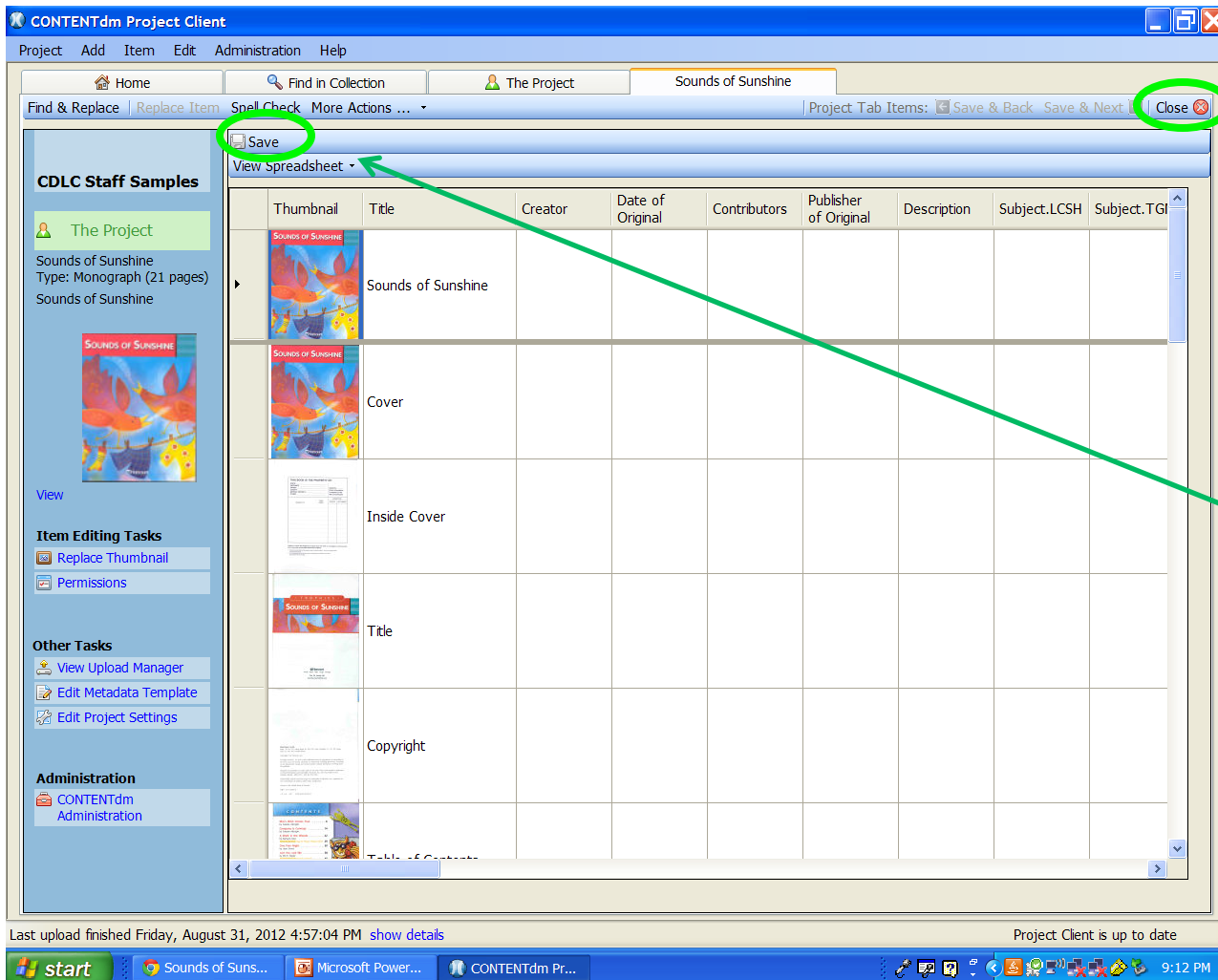


The screenshot shows the CONTENTdm Project Client interface. The main window displays a thumbnail structure view for the project 'Sounds of Sunshine'. On the left, there is a sidebar with navigation options like 'Home', 'Find in Collection', and 'The Project'. The main area shows a list of thumbnails for the project, including 'Sounds of Sunshine', 'Cover', 'Inside Cover', and 'Title'. A red arrow points from the top right towards the 'Cover' thumbnail. On the right side, there is a metadata table with the following structure:

Field Name	Field Values
Title	Sounds of Sunshine
Creator	
Date of Original	
Contributors	
Publisher of Original	
Description	
Subject.LCSH	
Subject.TGM	
Personal Name	
Corporate Name	
Location	
CDLC DP Topic	
Language	
Coverage	
Original	
Type	
Relation	
Source	
Resource Identifier	
Publisher of Digital	
Date of Digital	
Format of Digital	
Digital Collection	
Holding Institution	
Contact Information	

At the bottom of the window, there is a status bar showing 'Last upload finished Friday, August 31, 2012 4:57:04 PM show details' and 'Project Client is up to date'. The Windows taskbar at the very bottom shows the Start button and several open applications, including 'Sounds of Suns...', 'Microsoft Power...', and 'CONTENTdm Pr...'. The system clock shows '9:12 PM'.

Spreadsheet Structure view:



CONTENTdm Project Client






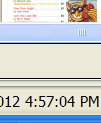
Project Add Item Edit Administration Help

Home Find in Collection The Project Sounds of Sunshine

Find & Replace Replace Item Spell Check More Actions ... Project Tab Items: Save & Back Save & Next Close

Save

View Spreadsheet

Thumbnail	Title	Creator	Date of Original	Contributors	Publisher of Original	Description	Subject.LCSH	Subject.TGI
	Sounds of Sunshine							
	Cover							
	Inside Cover							
	Title							
	Copyright							
	Table of Contents							

Last upload finished Friday, August 31, 2012 4:57:04 PM show details Project Client is up to date

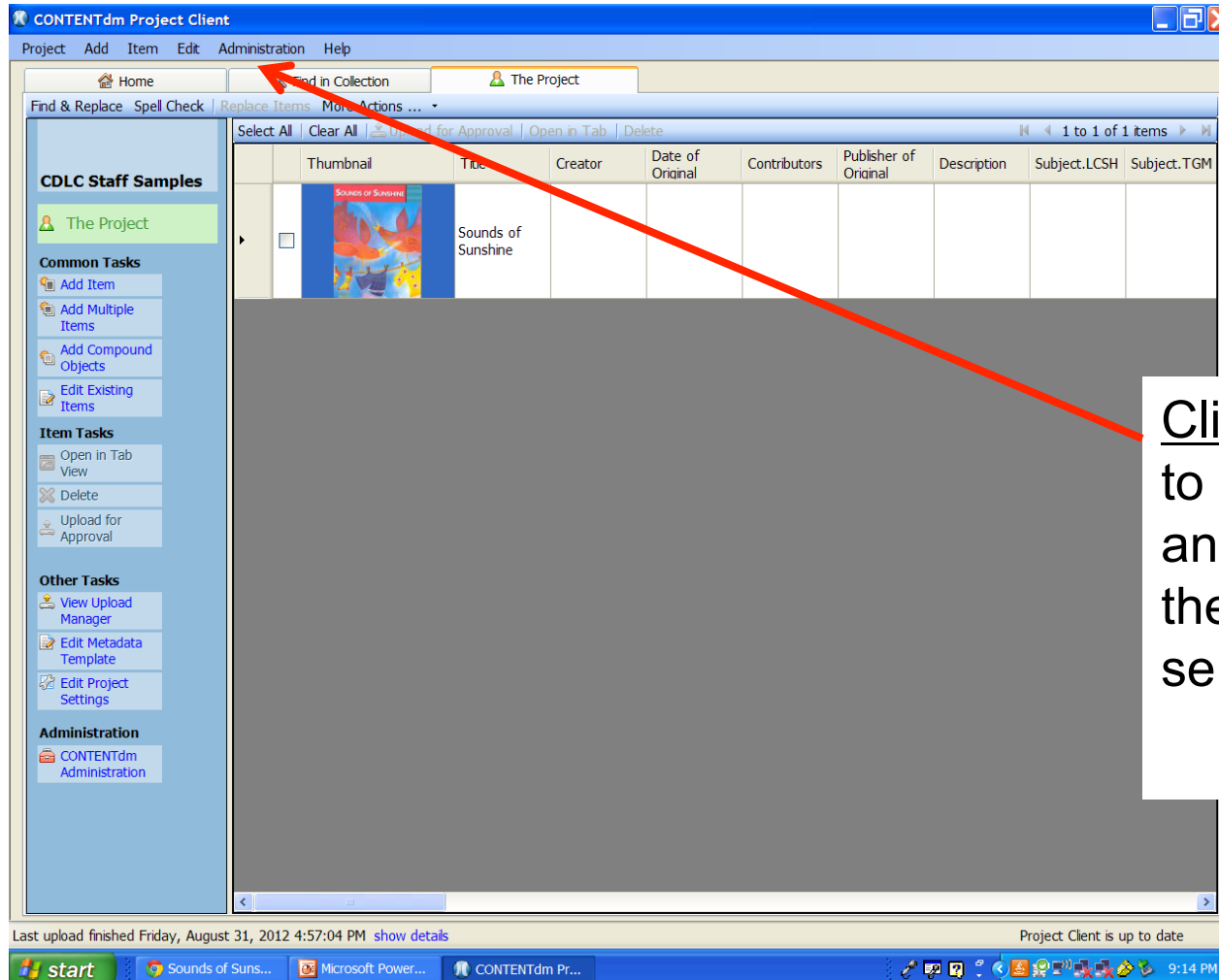
start Sounds of Suns... Microsoft Power... CONTENTdm Pr... 9:12 PM

Once all metadata has been entered:


Click on Save

Click on Close

In Project tab view:



The screenshot shows the CONTENTdm Project Client interface. The 'Administration' menu item in the left sidebar is highlighted with a red arrow. The main window displays a table with one item, 'Sounds of Sunshine', and a status bar at the bottom indicating the last upload finished on Friday, August 31, 2012.

Thumbnail	Title	Creator	Date of Original	Contributors	Publisher of Original	Description	Subject.LCSH	Subject.TGM
	Sounds of Sunshine							

Project Client is up to date

Click on **Administration** to **upload**, **approve**, and **index** the items to the CONTENTdm server.