

# Tab-Delimited File and Compound Objects - Documents, Postcards, and Cubes (Not Monographs)

See Help Sheet: Tab-Delimited File and Compound Object - Monograph

Page 4: Why use Tab-delimited files?

Page 5: How to create a Tab-delimited file.

Page 9: Example – A document, transcripts, and a Tab-delimited file.

Page 9: Folder set-up

Page 10: Tab-delimited file set-up in an Excel file -

Page 10: First row.

Page 11: Second row.

Page 12: Columns (for documents, postcards, and cubes).

Page 13: Saving Excel file as a Tab-delimited file.

Page 15: Importing files into CONTENTdm Project Client.

Page 16: Setting up automatic collection of File Names.

Page 19: Importing Tab-delimited file, document images, &  
transcript files.

Page 28: Map Metadata Fields

Page 33: View Structure of Compound Object

Page 33: Structure view

Page 35: Thumbnail view

Page 36: Spreadsheet view

Page 37: Upload, approve, and index.

# 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 – 2<sup>nd</sup> 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:

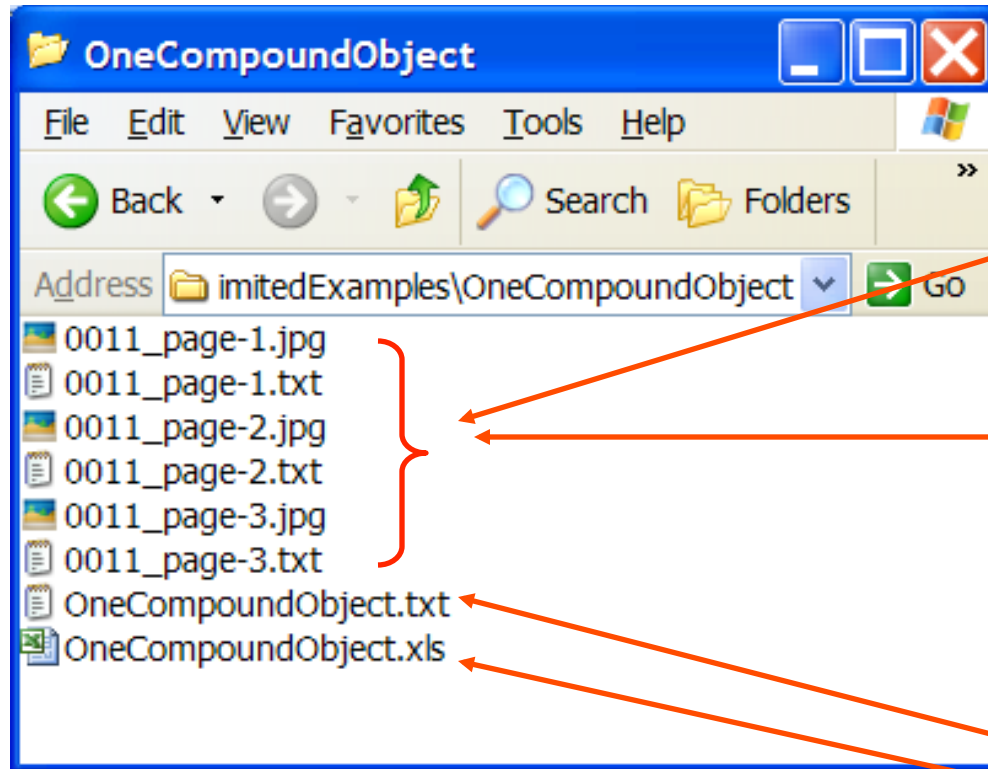
- **One Excel column must contain the file name of the images being imported and mapped to Object File Name** - Best practice, the field that contains the file names of the imported images is placed in the last field column used in the Excel file.
- **All object metadata** field names must appear in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



Folder set up for a document.

Folder contains:

--the 3 jpg images that make up the compound object - document and

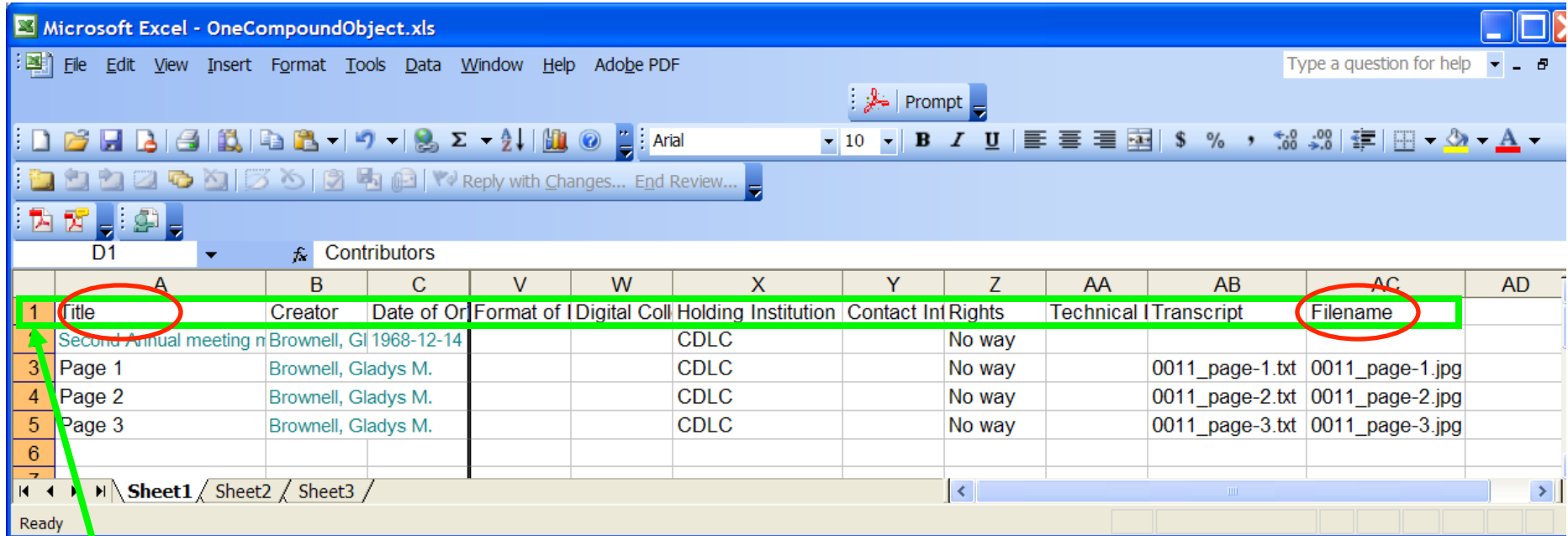
--the 3 txt files that contain the transcript files for each associated images to be imported into CONTENTdm Project Client for this example.

--Tab-delimited file (txt),

--Excel file (xls),

**Note:** the image files and transcript files can each be in their own sub-folder too.

## Document – Excel file - Rows

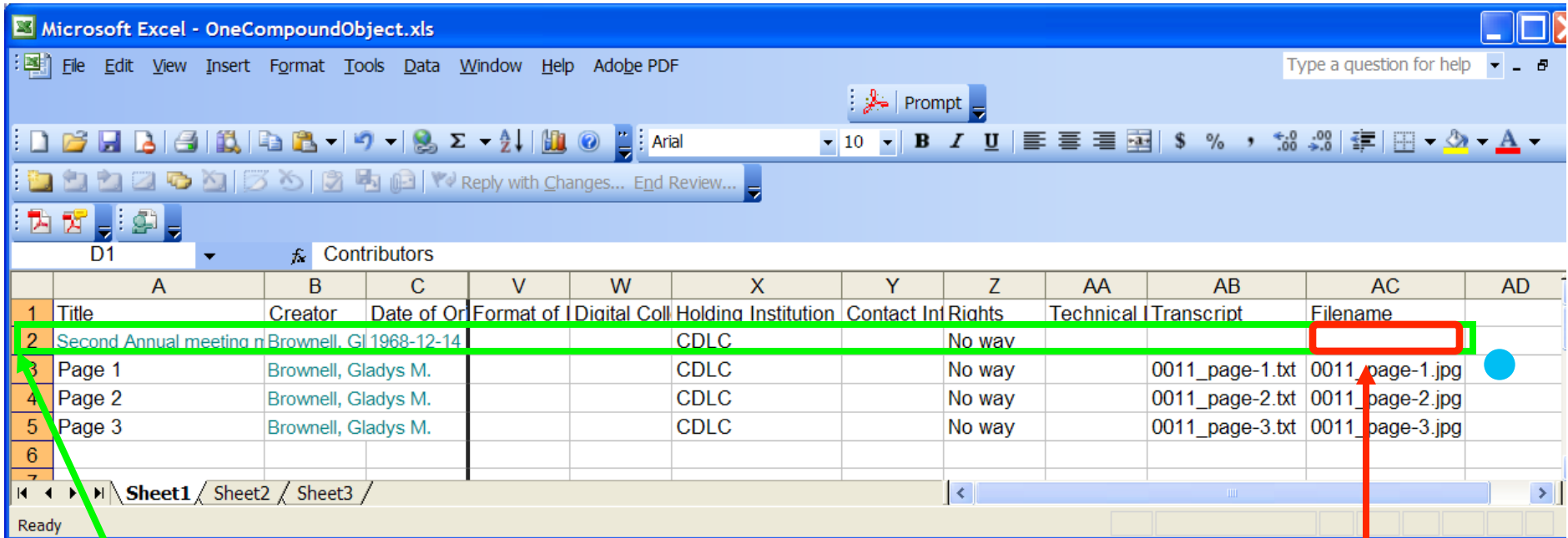


1	Title	Creator	Date of Or	Format of I	Digital Coll	Holding Institution	Contact In	Rights	Technical I	Transcript	Filename
2	Second Annual meeting n	Brownell, Gl	1968-12-14			CDLC		No way			
3	Page 1	Brownell, Gladys M.				CDLC		No way	0011_page-1.txt	0011_page-1.jpg	
4	Page 2	Brownell, Gladys M.				CDLC		No way	0011_page-2.txt	0011_page-2.jpg	
5	Page 3	Brownell, Gladys M.				CDLC		No way	0011_page-3.txt	0011_page-3.jpg	
6											
7											

For Compound Objects:

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**).

## Document – Excel file - Rows



	A	B	C	V	W	X	Y	Z	AA	AB	AC	AD
1	Title	Creator	Date of Origin	Format of Original	Digital Collection	Holding Institution	Contact Information	Rights	Technical Information	Transcript	Filename	
2	Second Annual meeting of	Brownell, Gladys M.	1968-12-14			CDLC		No way				
3	Page 1	Brownell, Gladys M.				CDLC		No way		0011_page-1.txt	0011_page-1.jpg	
4	Page 2	Brownell, Gladys M.				CDLC		No way		0011_page-2.txt	0011_page-2.jpg	
5	Page 3	Brownell, Gladys M.				CDLC		No way		0011_page-3.txt	0011_page-3.jpg	
6												
7												

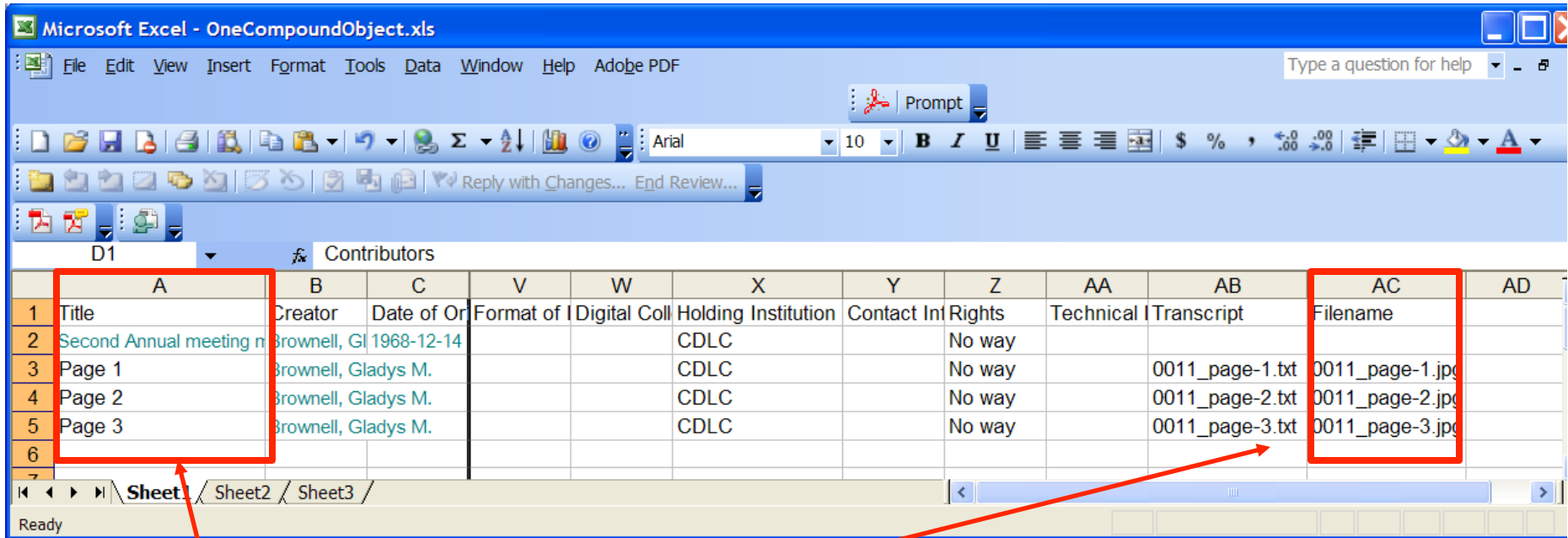
For Compound Objects:

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

There is **NO** image file for the object metadata- so **File Name** cell is blank.

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

## Documents – Excel file - Columns

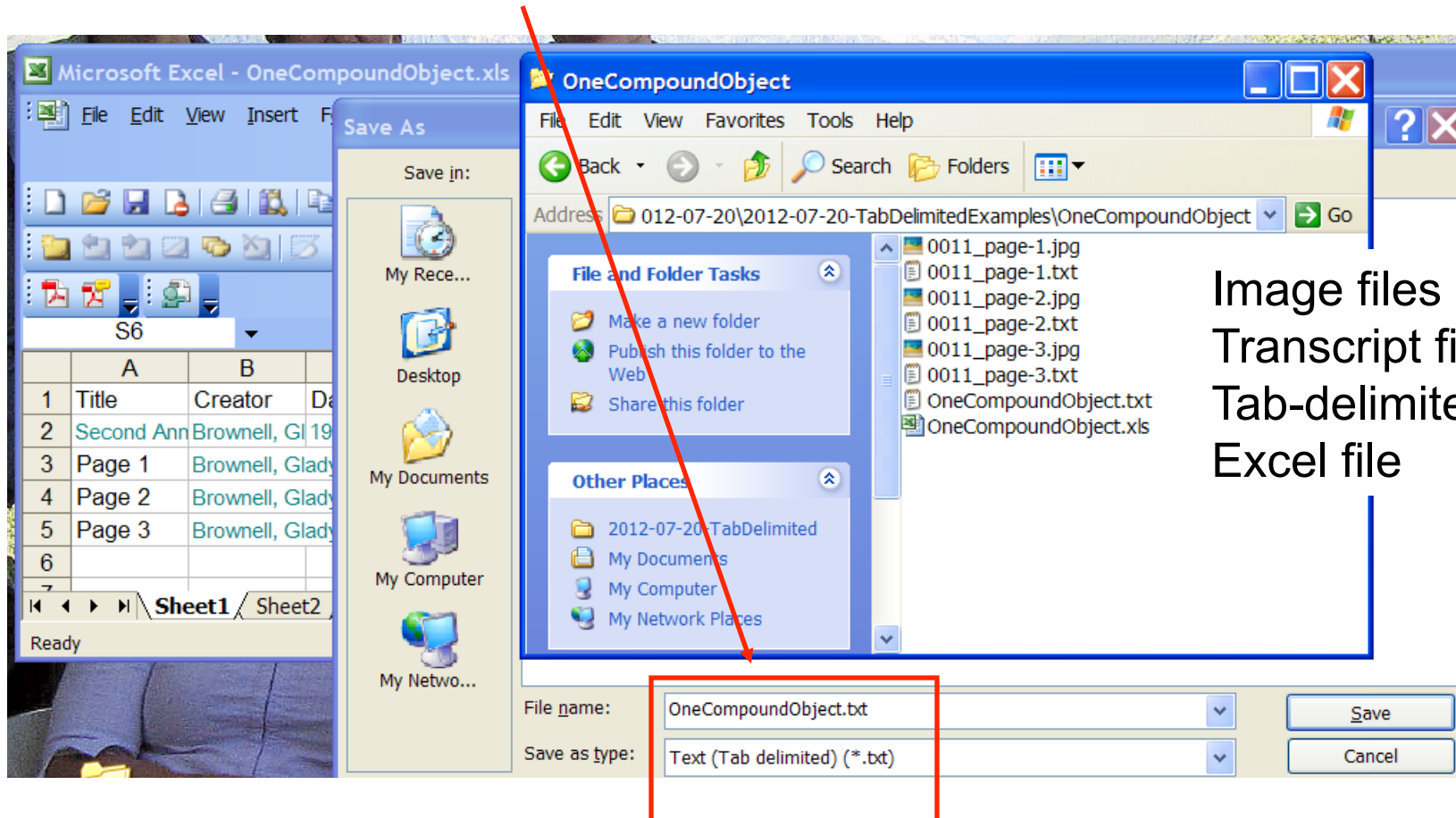


	A	B	C	V	W	X	Y	Z	AA	AB	AC	AD
1	Title	Creator	Date of Or	Format of I	Digital Coll	Holding Institution	Contact Int	Rights	Technical I	Transcript	Filename	
2	Second Annual meeting n	Brownell, Gl	1968-12-14			CDLC		No way				
3	Page 1	Brownell, Gladys M.				CDLC		No way		0011_page-1.txt	0011_page-1.jpg	
4	Page 2	Brownell, Gladys M.				CDLC		No way		0011_page-2.txt	0011_page-2.jpg	
5	Page 3	Brownell, Gladys M.				CDLC		No way		0011_page-3.txt	0011_page-3.jpg	
6												
7												

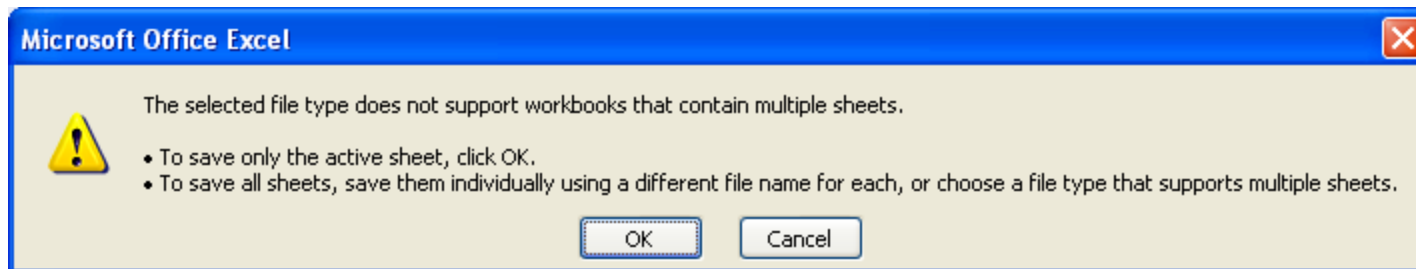
The **first column** in the file contains the titles for the object and each page of the object.

The **last column** contains the image file names (mapped to “Object File Name”). Remember, the object metadata row does not have an image file.

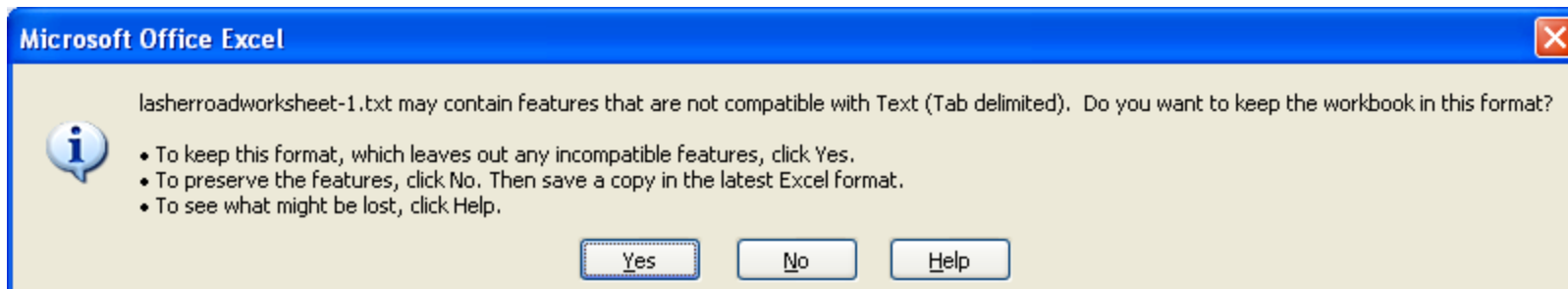
Once the Excel file is created, completed, and **saved** as an Excel file, **save the file again as a Tab-delimited file (txt).**



**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**.



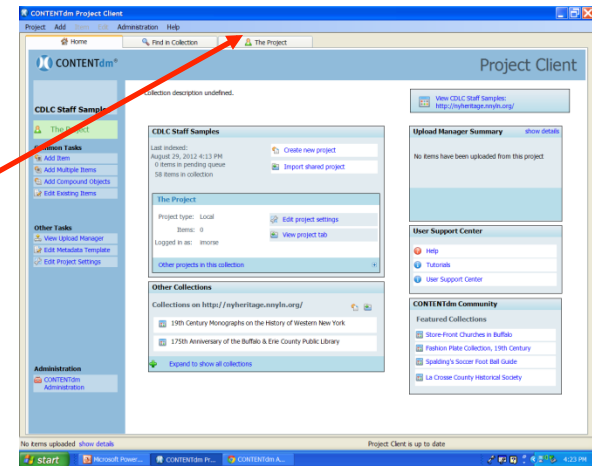
You want the worksheet in Tab-delimited format, so click on **Yes**.



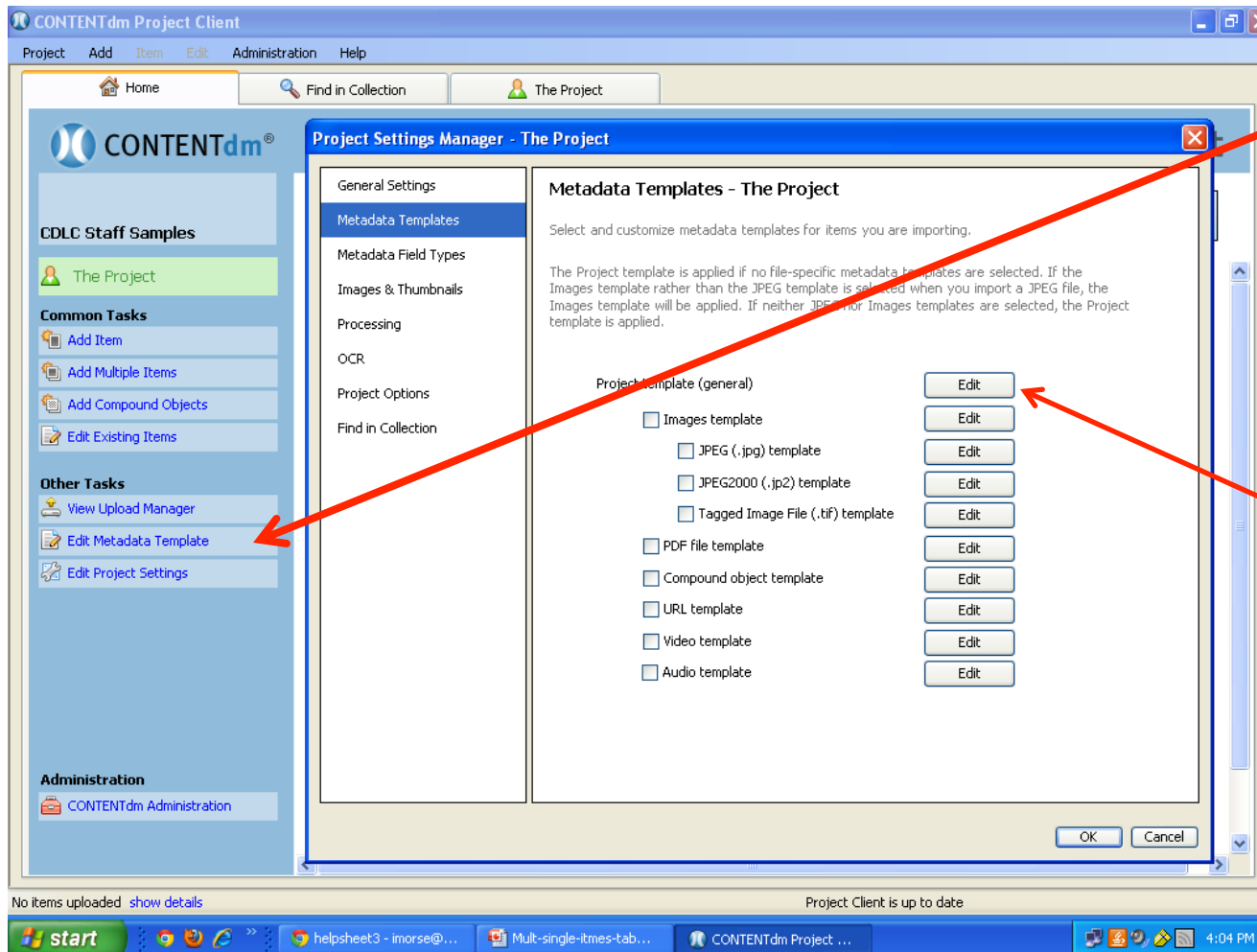
If changes need to be made in the tab-delimited file, make the changes in the Excel file, save it, and then save it again as a Tab-delimited file. **It is best not to work in the Tab-delimited file.**

# Import Tab-delimited file into CONTENTdm Project Client

- Open **CONTENTdm Project Client**.
- Open 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.



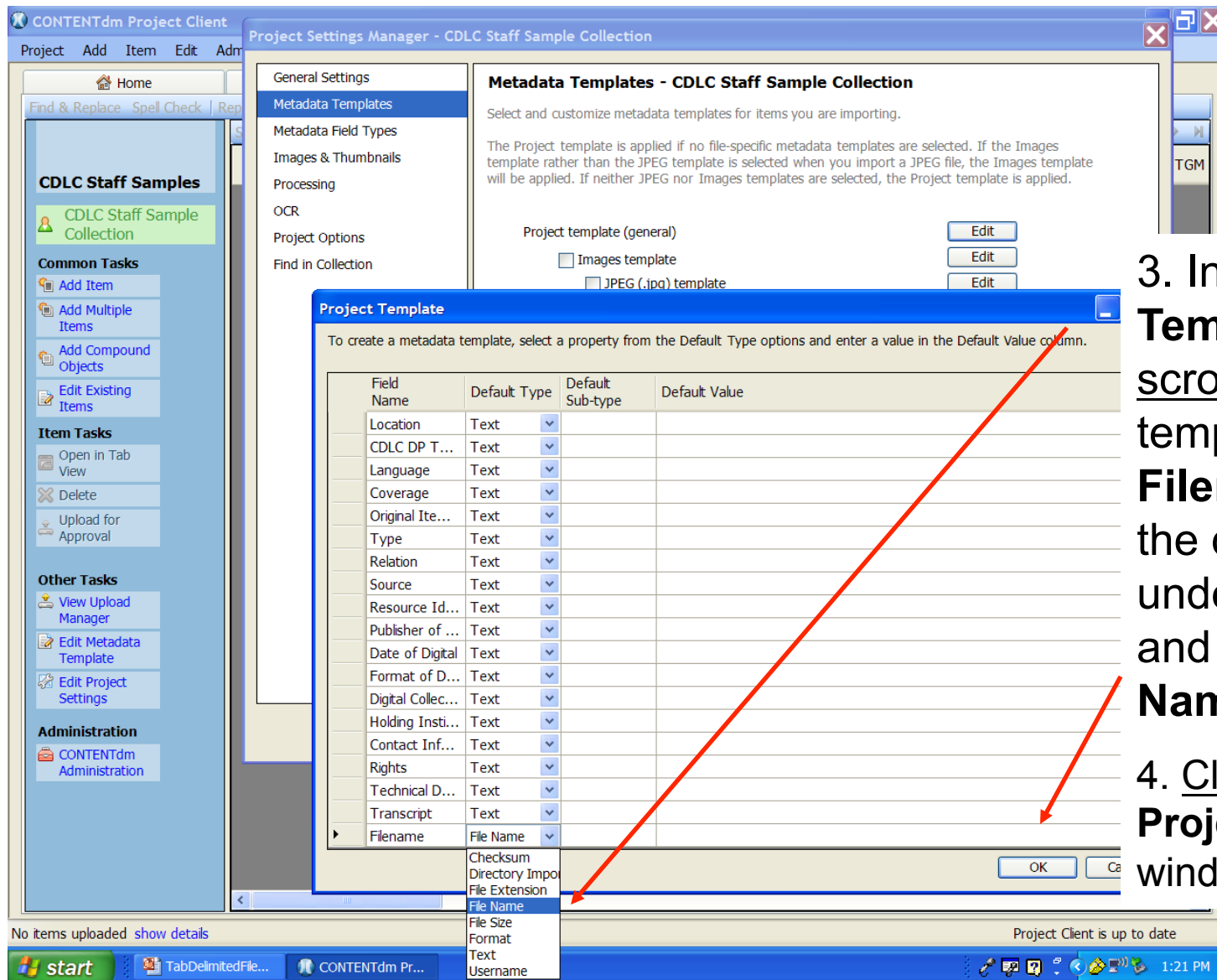
To automatically collect the File Name metadata information follow the next 5 steps.



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

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



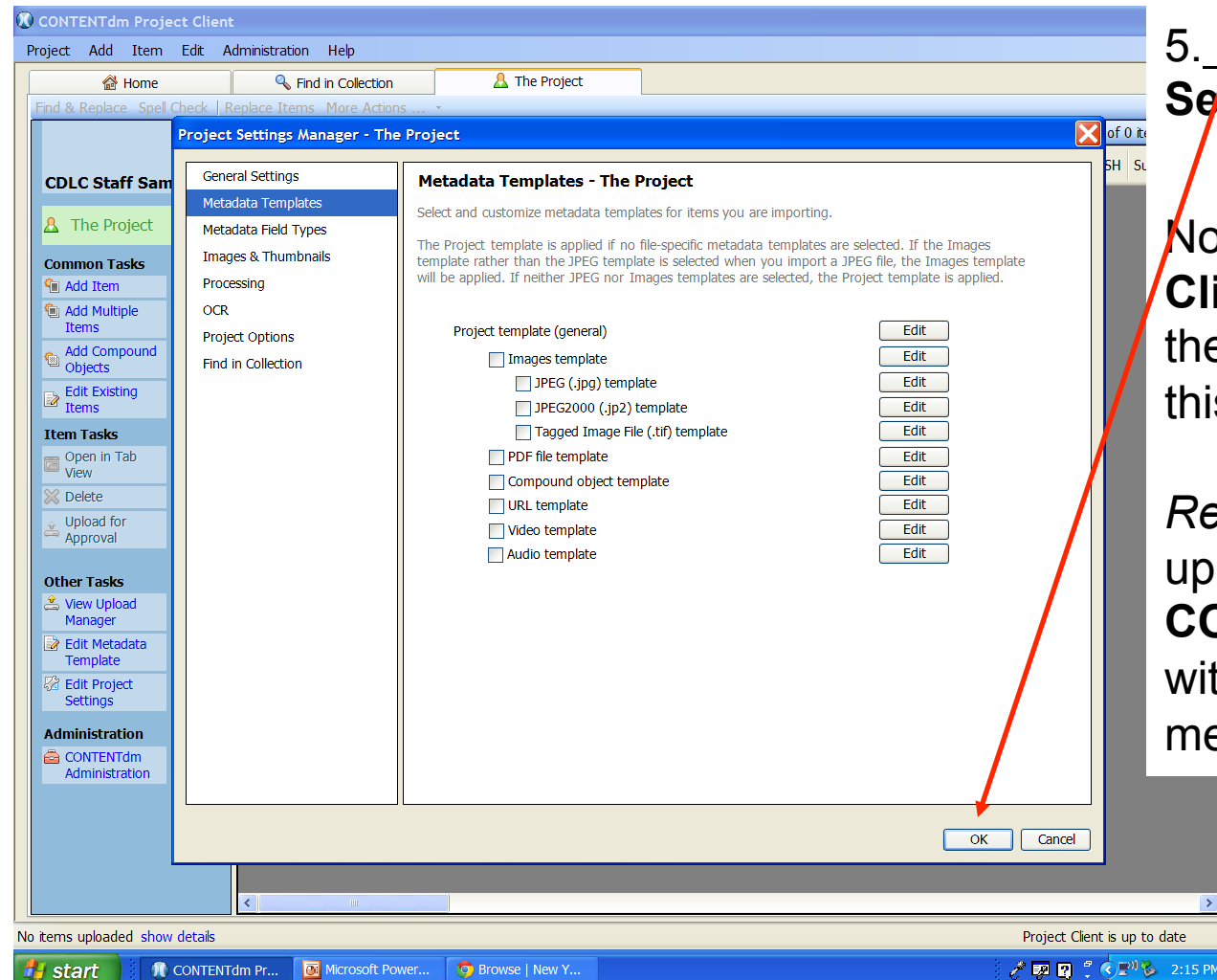


The screenshot shows the CONTENTdm Project Client interface. The main window is titled "Project Settings Manager - CDLC Staff Sample Collection". It has a sidebar with navigation options like "Home", "Find & Replace", "Spell Check", and "Rep". The main area is divided into "General Settings" and "Metadata Templates". The "Metadata Templates" section is active, showing instructions on how to select and customize metadata templates. Below this, there are checkboxes for "Images template" and "JPEG (.jpe) template", each with an "Edit" button.

A "Project Template" dialog box is open in the foreground. It contains a table with the following columns: "Field Name", "Default Type", "Default Sub-type", and "Default Value". The table lists various metadata fields such as "Location", "Language", "Type", "Relation", "Source", "Resource Id...", "Publisher of...", "Date of Digital", "Format of D...", "Digital Collec...", "Holding Insti...", "Contact Inf...", "Rights", "Technical D...", "Transcript", and "Filename". The "Filename" row is highlighted, and its "Default Type" dropdown menu is open, showing options like "Checksum", "Directory Impo...", "File Extension", "File Name", "File Size", "Format", "Text", and "Username". A red arrow points from the "Filename" row in the table to the "File Name" option in the dropdown menu. Another red arrow points from the "File Name" option to the "OK" button at the bottom right of the dialog box.

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.

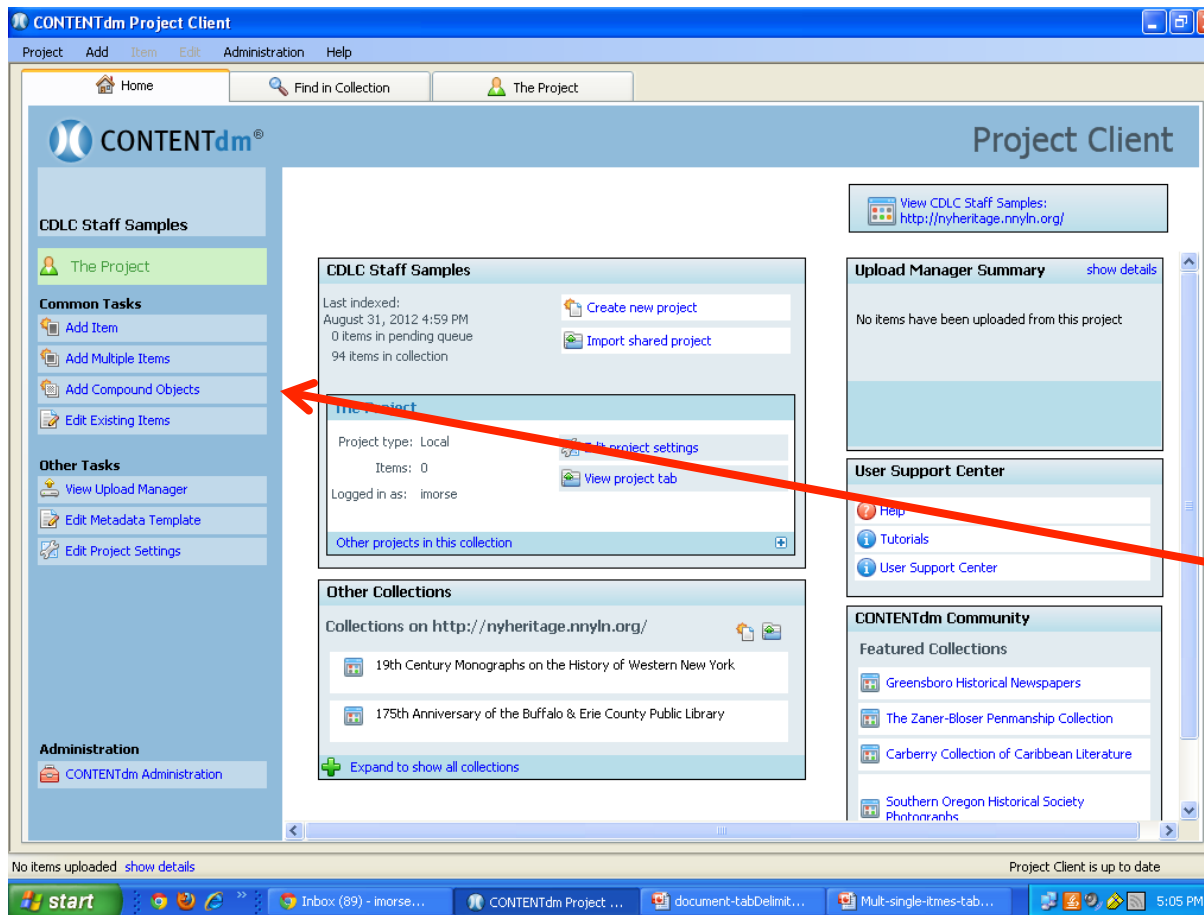


5. Click on **Ok** in the **Project Settings Manager** window.

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

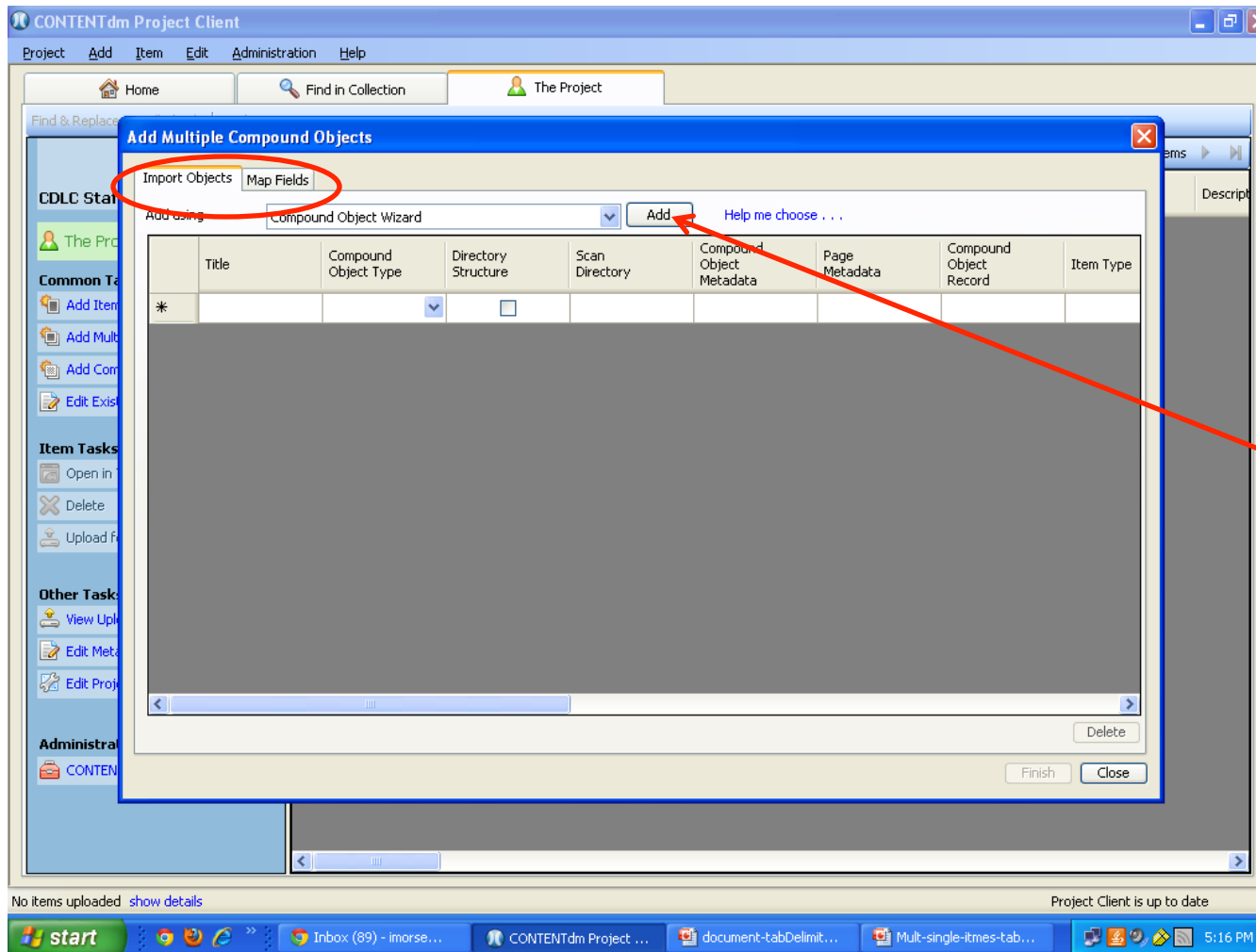
*Remember*, items will not be uploaded to the **CONTENTdm server** without the **File Name** metadata field information.

# Import Files



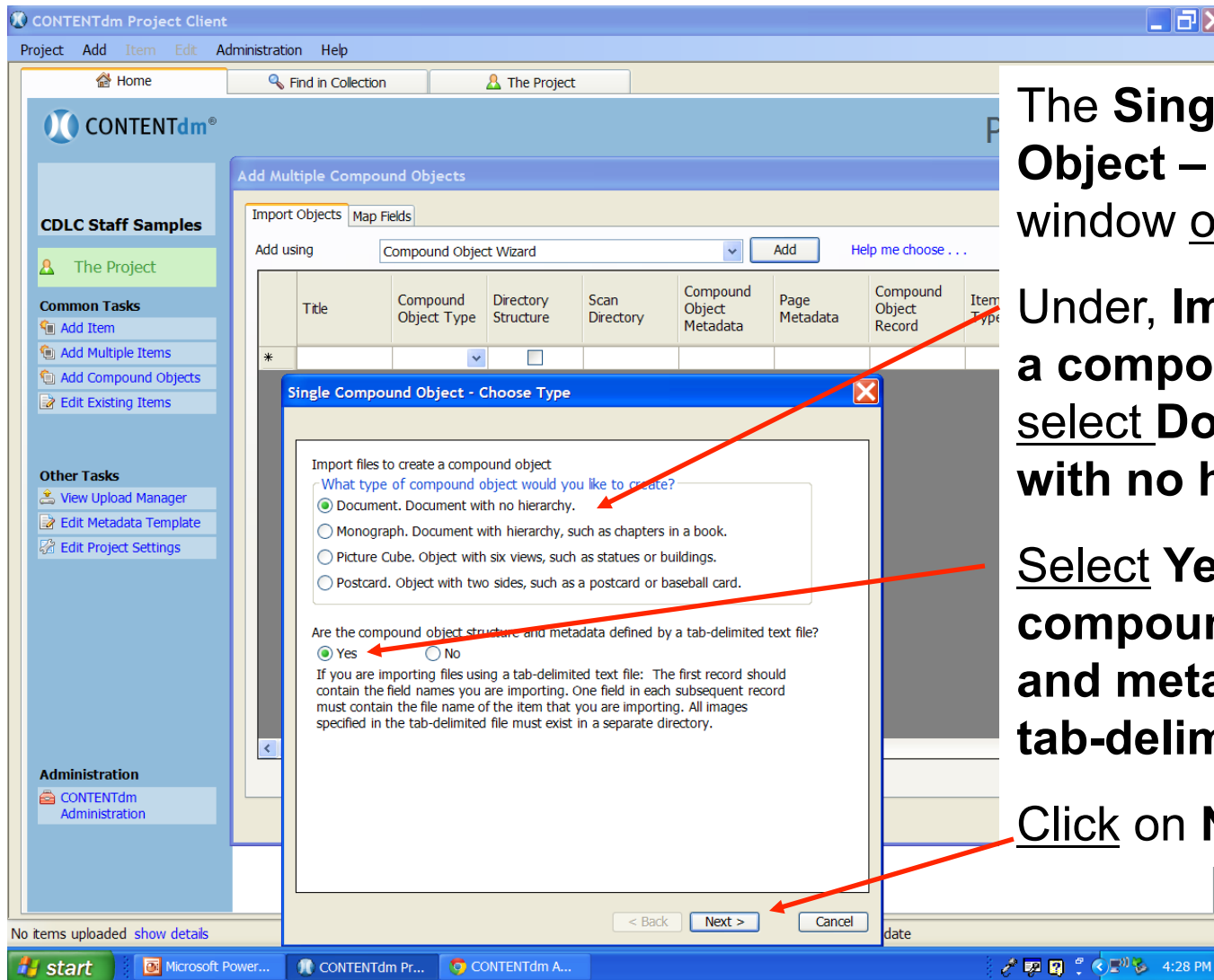
You are now back in the **Project tab** view and ready to **import the Tab-delimited file, the document and the transcript files.**

**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**.

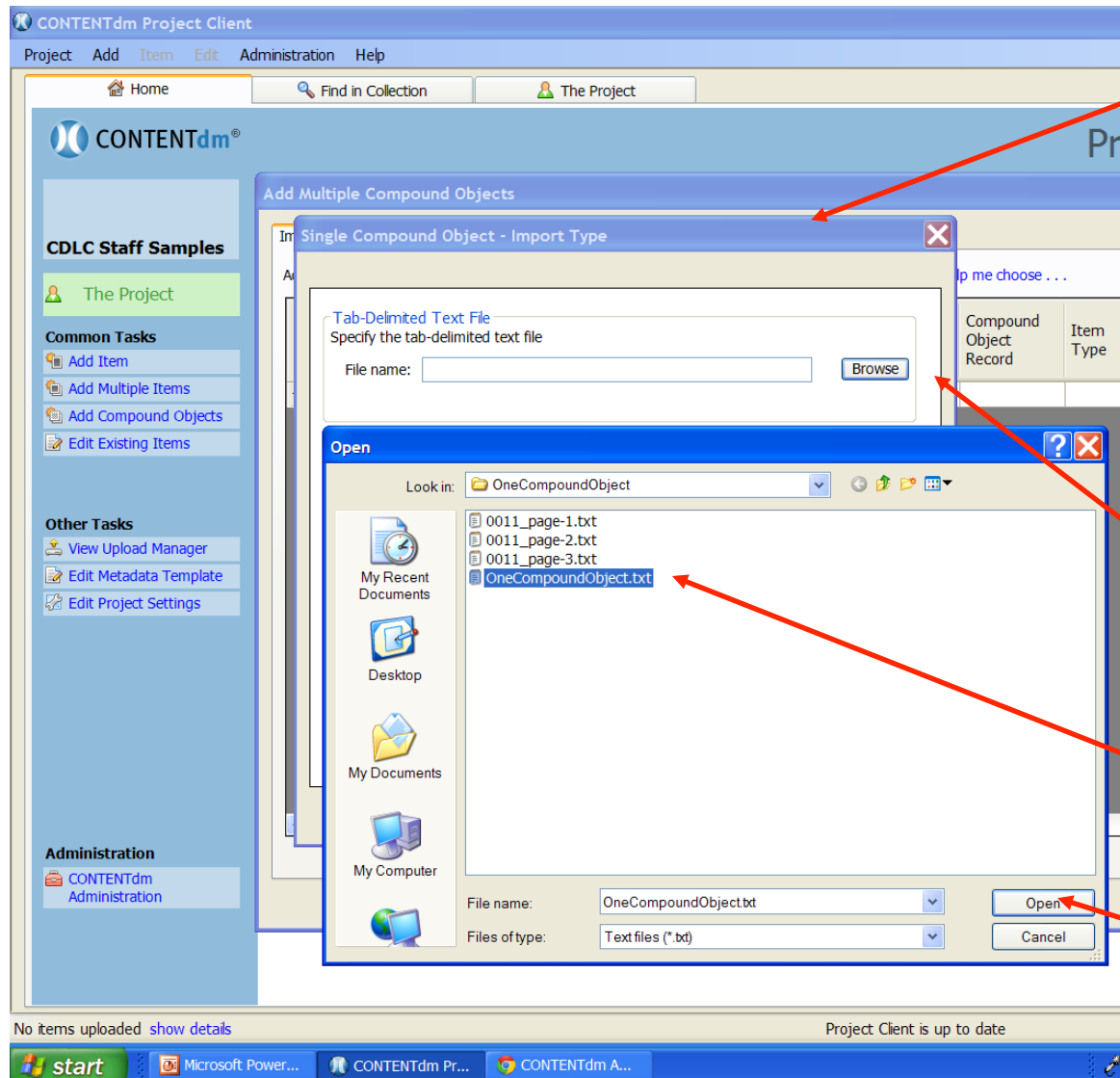


The **Single Compound Object – Choose Type** window opens.

Under, **Import files to create a compound object** section, select Document. **Document with no hierarchy**.

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.

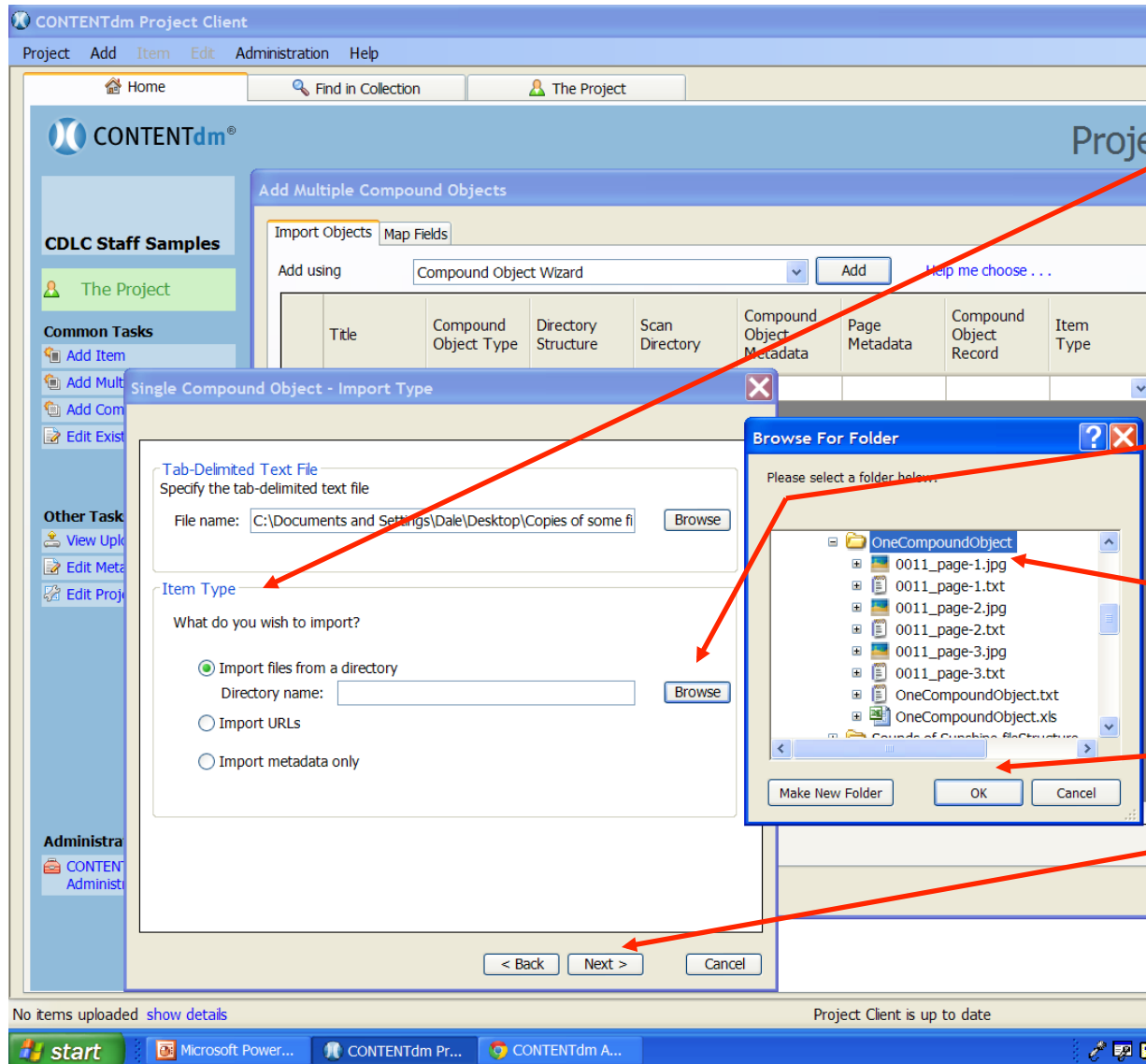
In the **Tab-Delimited Text File** section of the window.

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?**

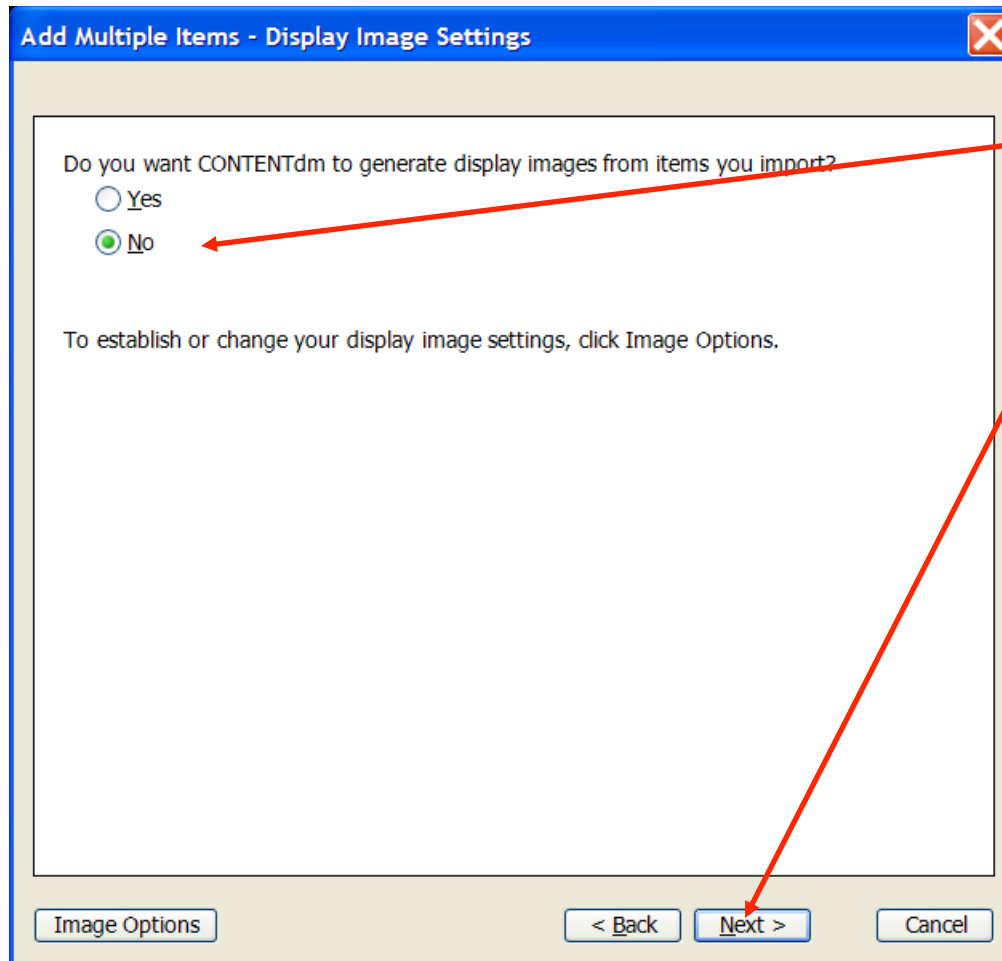
Select Import from a directory.

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.



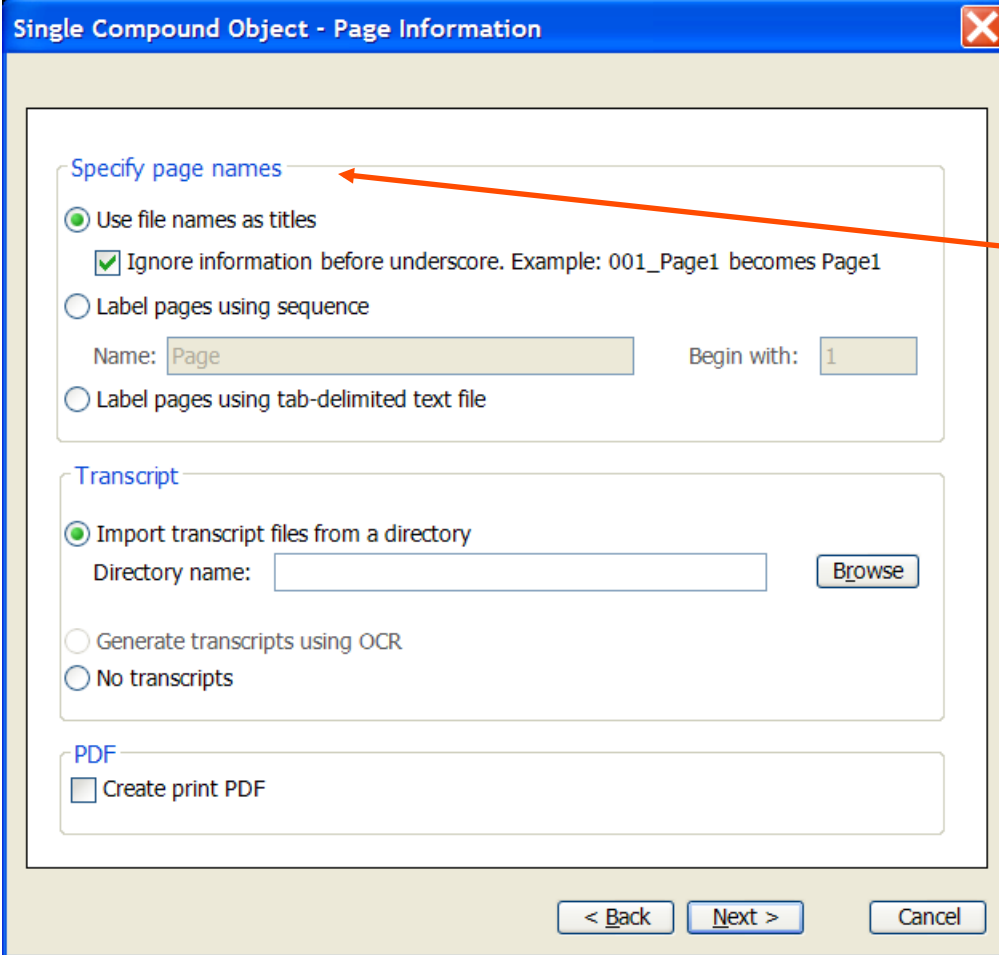
The **Add Multiple Items – Display Image Settings** window opens.

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.





Single Compound Object - Page Information

Specify page names

Use file names as titles

Ignore information before underscore. Example: 001\_Page1 becomes Page1

Label pages using sequence

Name:  Begin with:

Label pages using tab-delimited text file

Transcript

Import transcript files from a directory

Directory name:

Generate transcripts using OCR

No transcripts

PDF

Create print PDF

< Back Next > Cancel

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

Under **Specify page names** section, for this example, select Use file names as titles.

Select Ignore information before underscore.

Our document example has transcript files so,

Under the **Transcript** section of this window,

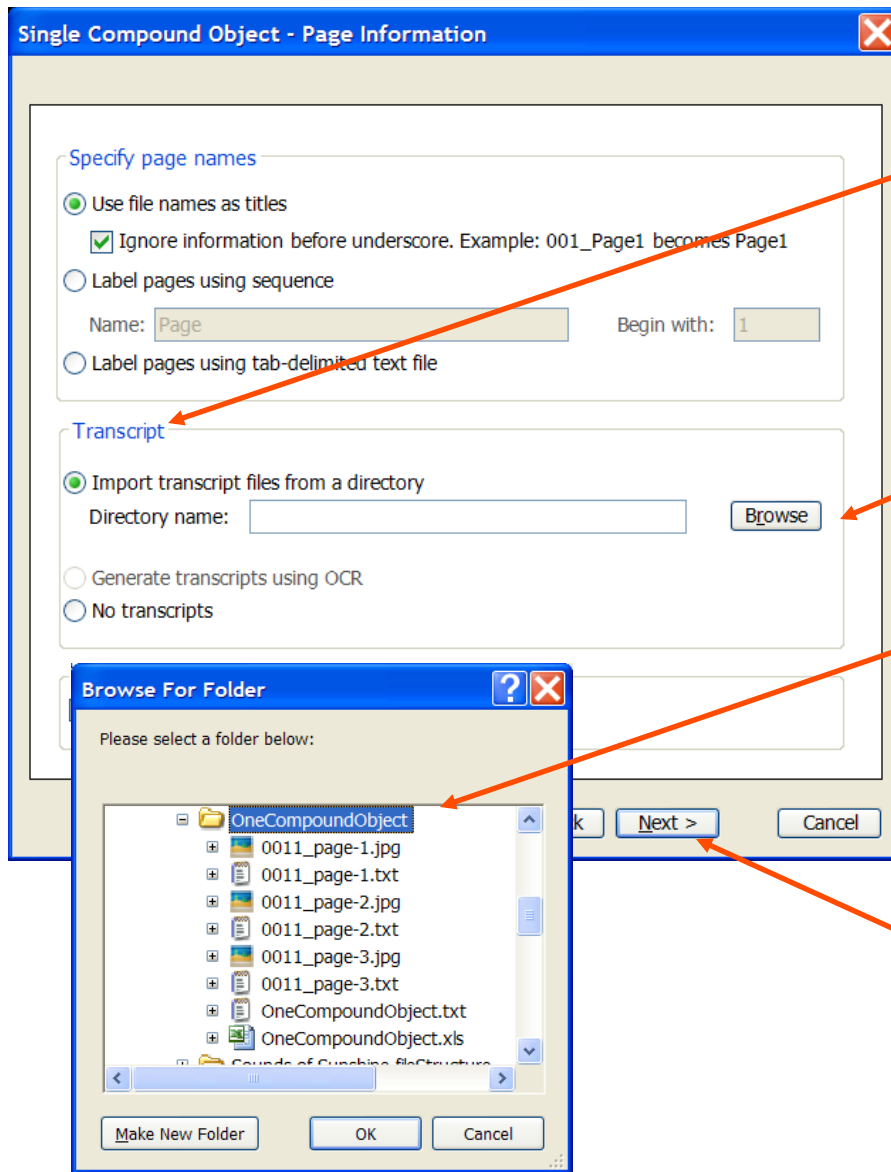
Select **Import transcript files from a directory**.

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**.)

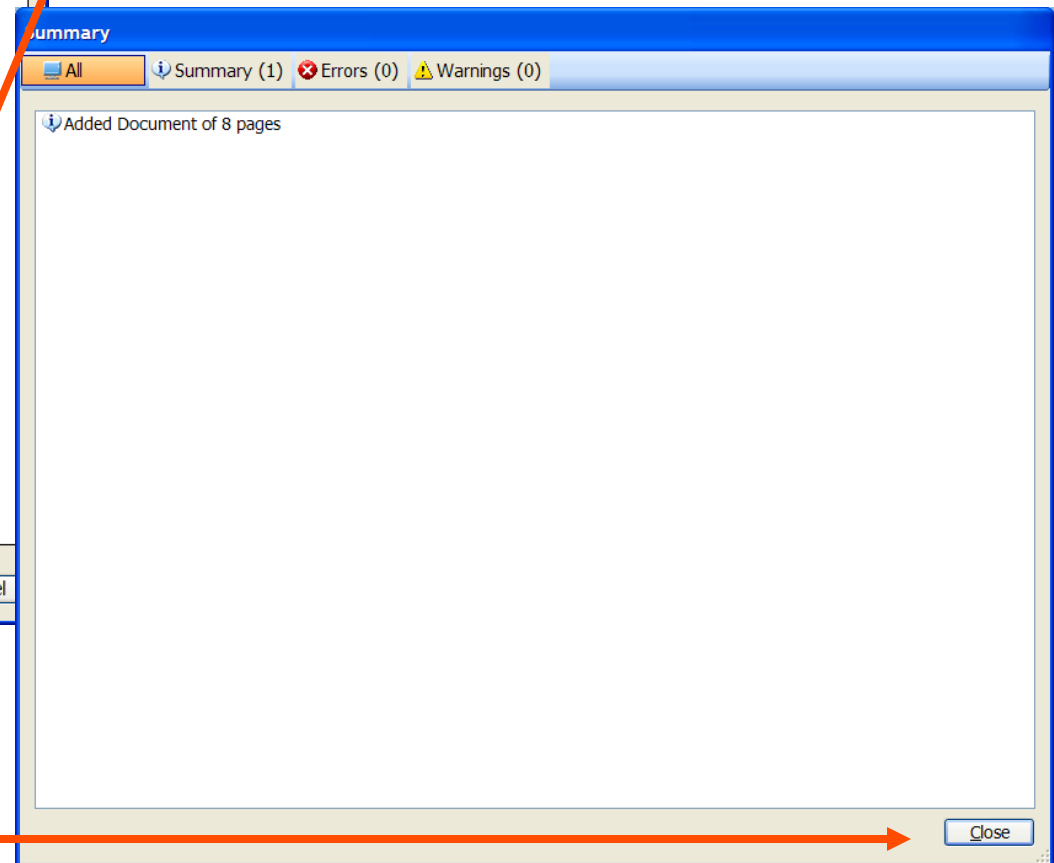
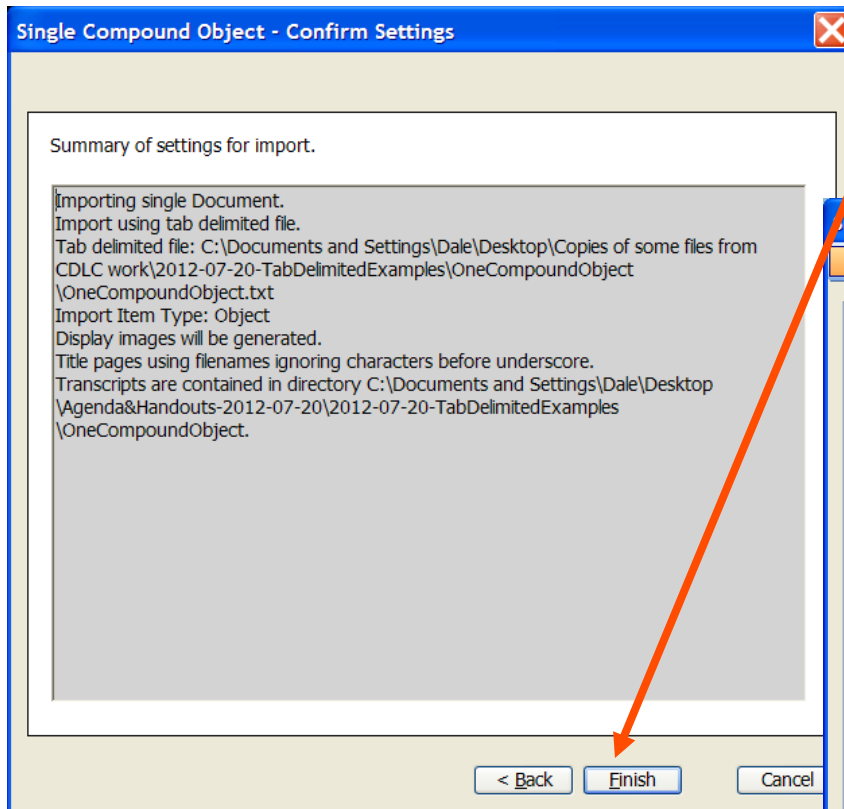
Click on **Next** back in the **Single Compound Object – Page Information** window.



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

Check the settings.

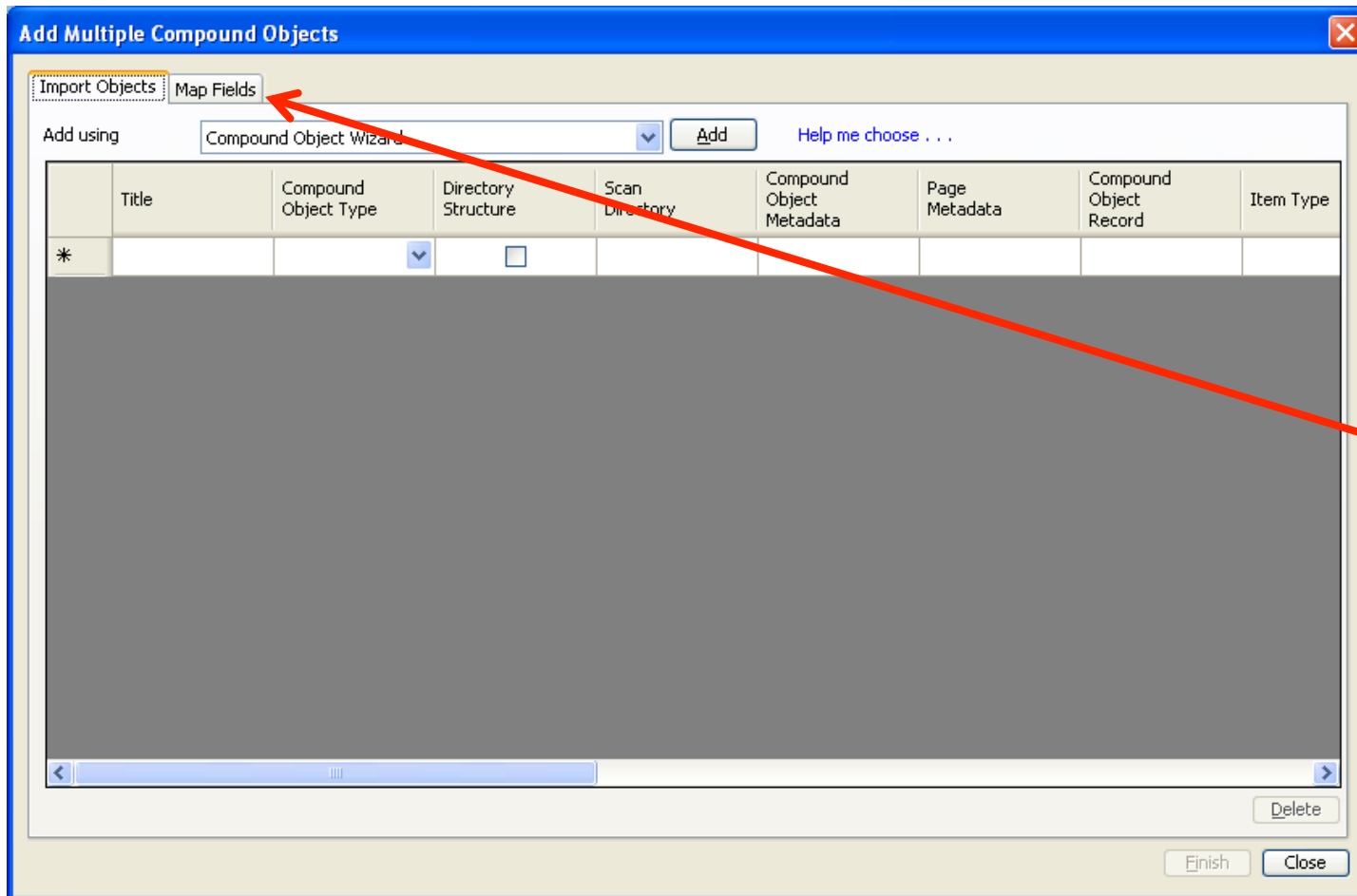
Click on **Finish**.



**Summary** window opens.

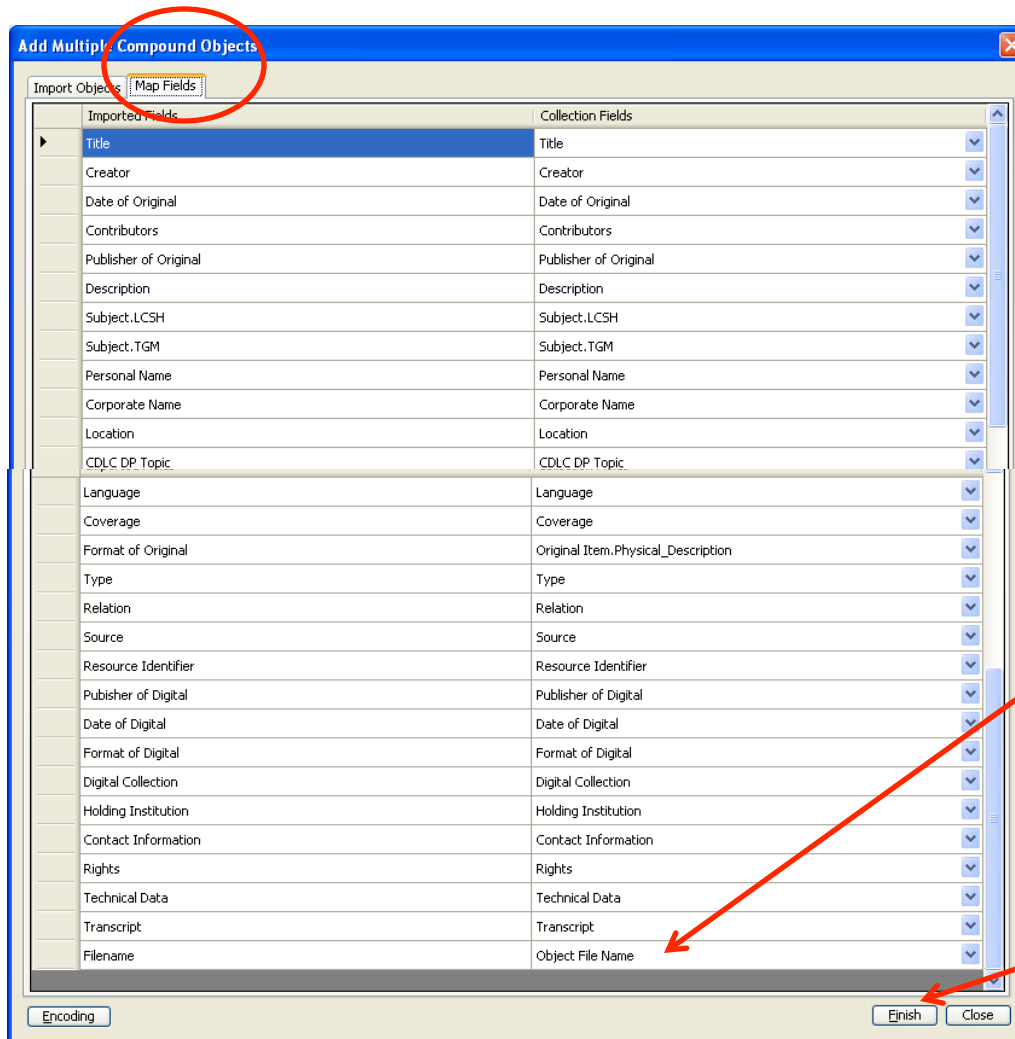
If there are no **Errors** or **Warnings** then click on **Close**.

# Map Metadata Fields



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

Click on the **Map Fields** tab.



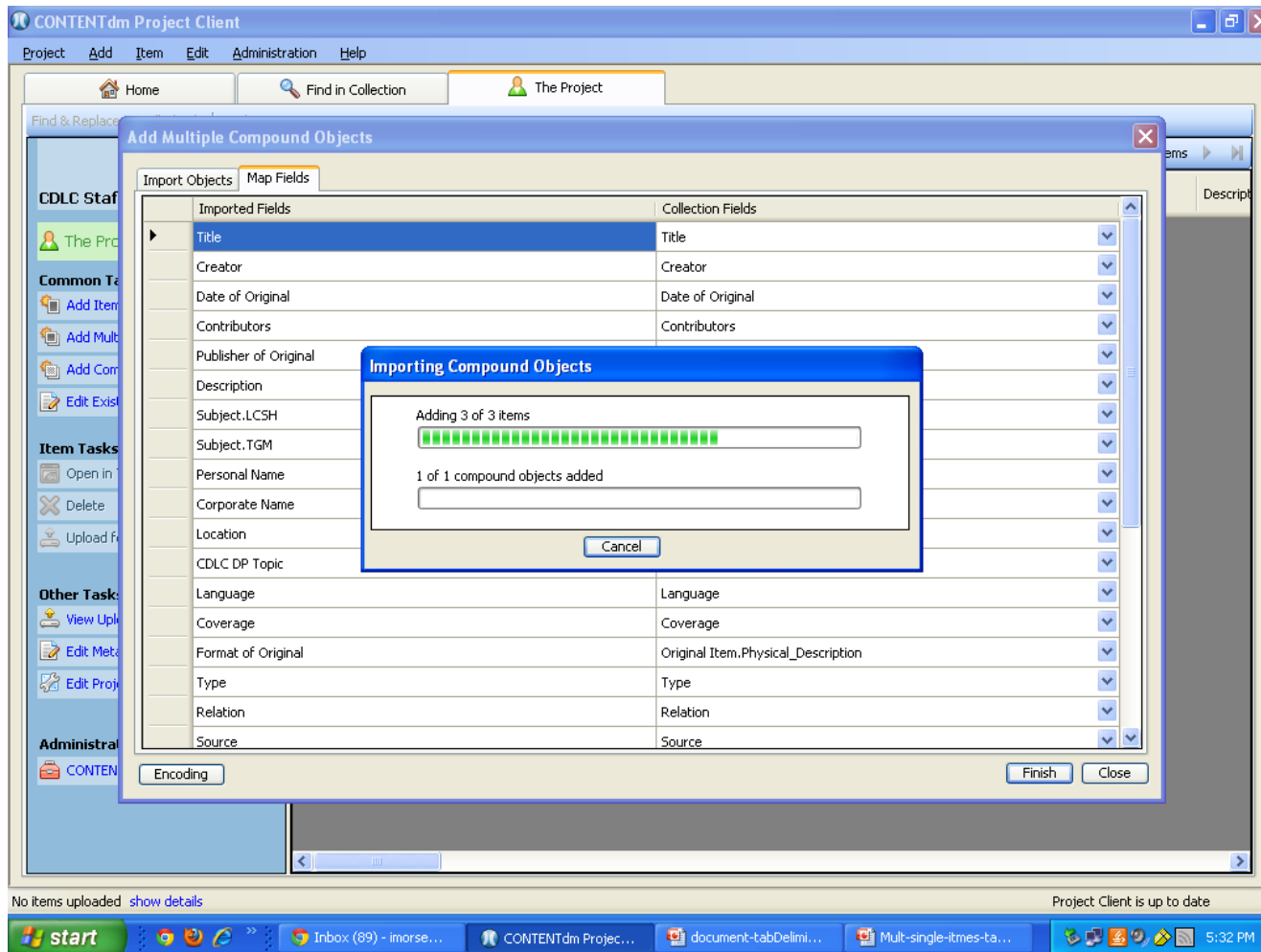
You are now in the **Add Multiple Items – Map Fields** tab view.

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**.

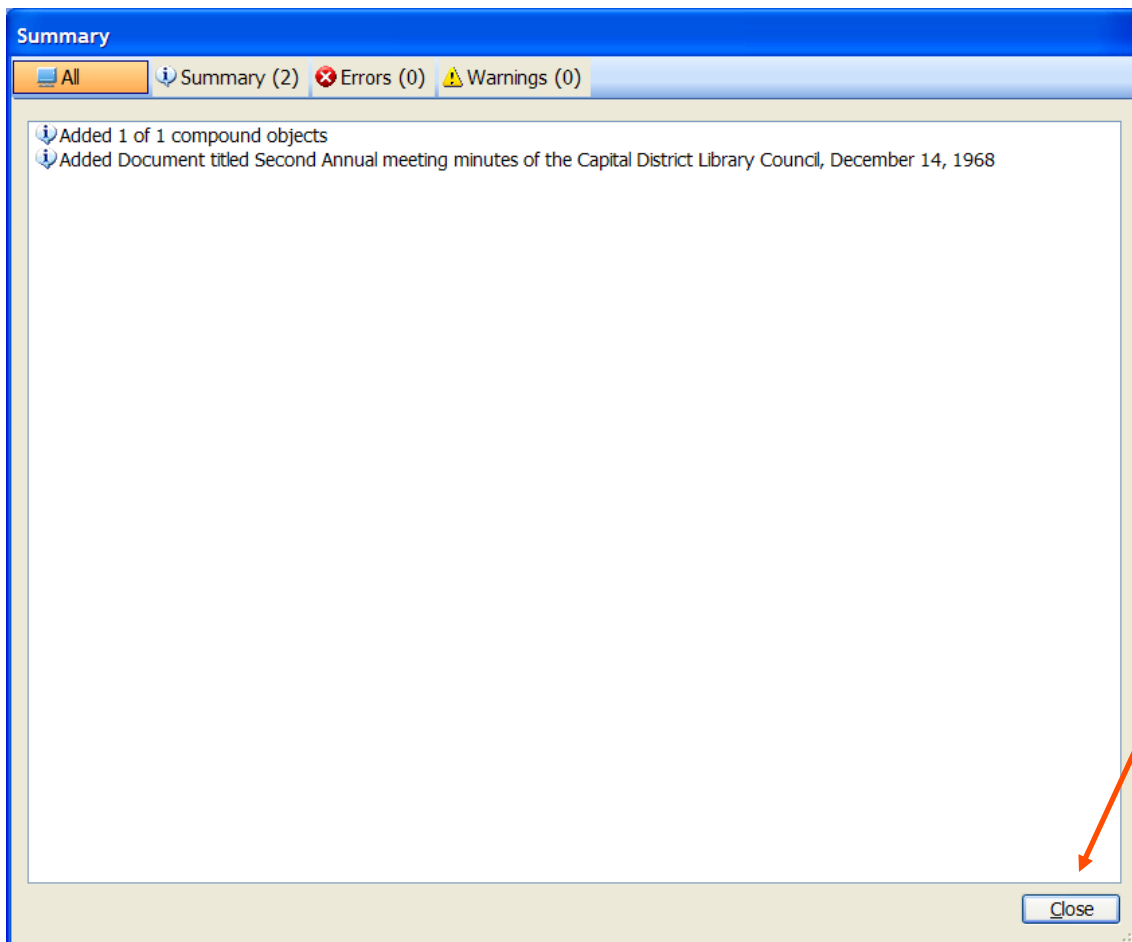
\*(file names in example are based on old CDLC template)



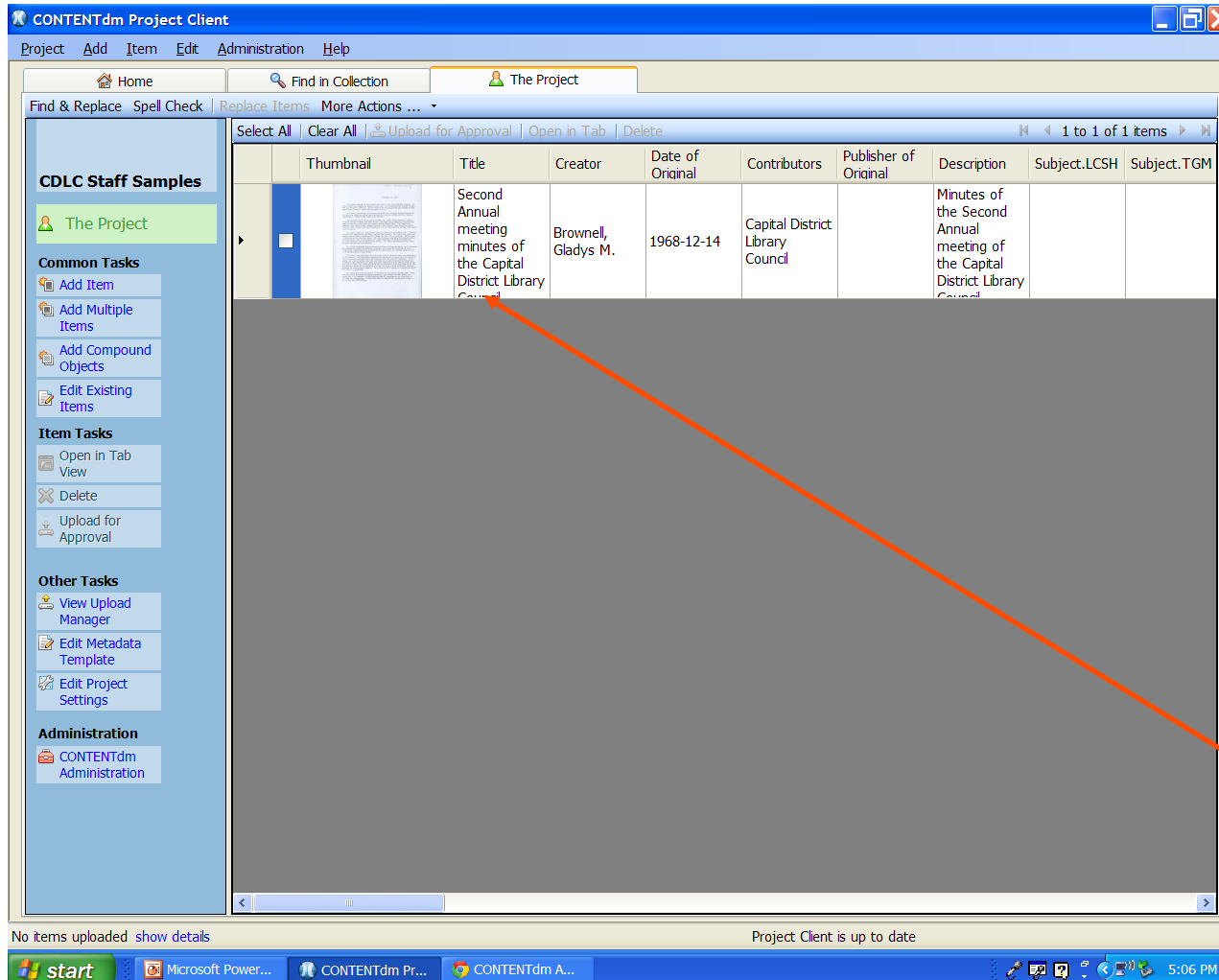
The  
Importing  
Compound  
Objects  
progress bar  
window  
opens.

**Summary** window  
opens.


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



## In the spreadsheet view of the Project Client:



The screenshot shows the CONTENTdm Project Client interface. The main area displays a spreadsheet view with the following data:

Thumbnail	Title	Creator	Date of Original	Contributors	Publisher of Original	Description	Subject.LCSH	Subject.TGM
	Second Annual meeting minutes of the Capital District Library Council	Brownell, Gladys M.	1968-12-14	Capital District Library Council		Minutes of the Second Annual meeting of the Capital District Library Council		

The interface includes a left-hand navigation pane with sections for 'CDLC Staff Samples', 'The Project', 'Common Tasks', 'Item Tasks', 'Other Tasks', and 'Administration'. The top menu bar includes 'Project', 'Add', 'Item', 'Edit', 'Administration', and 'Help'. The status bar at the bottom indicates 'No items uploaded show details' and 'Project Client is up to date'.

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

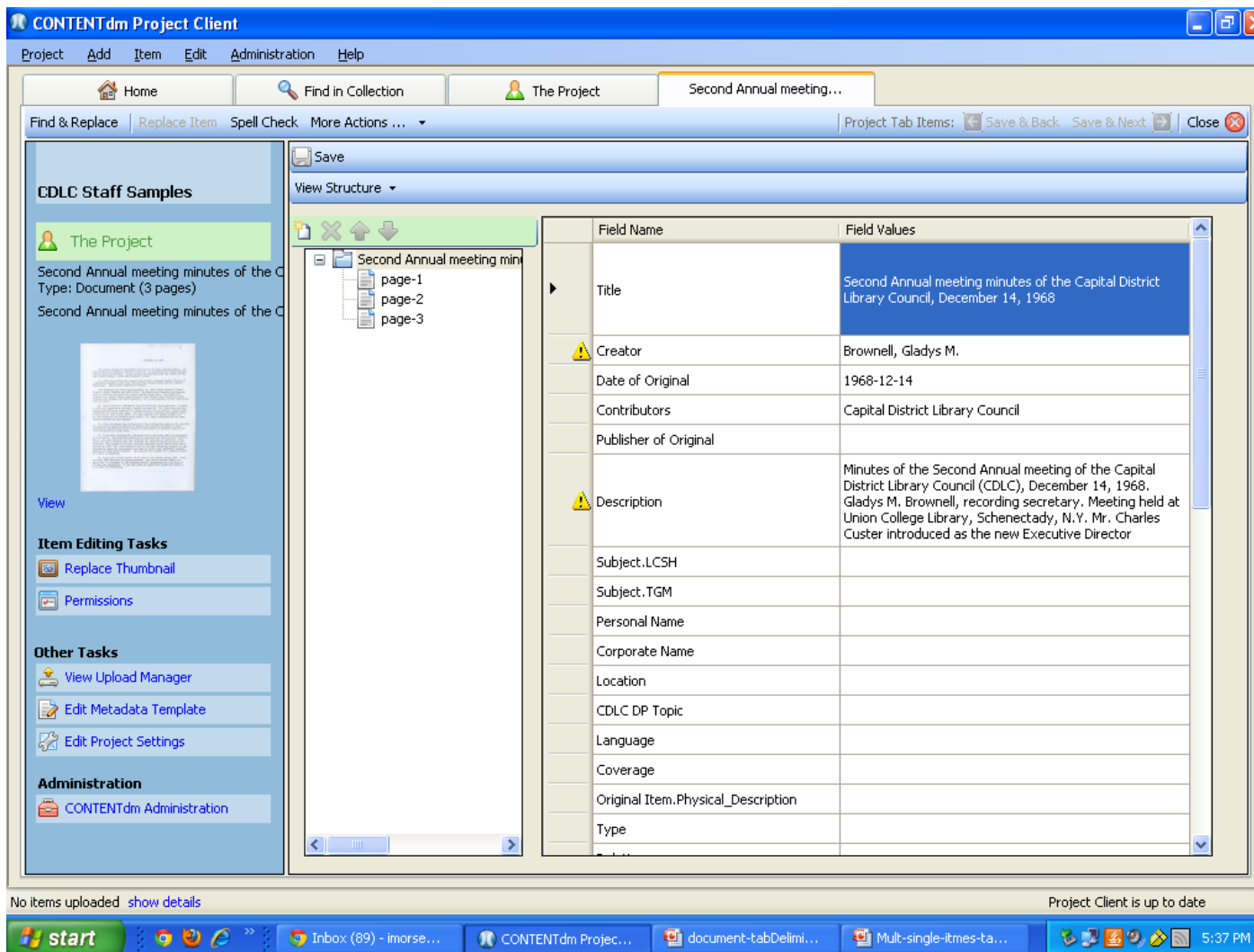
Additional metadata can be added if needed.

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



# Views of the structure of the compound object.

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



The screenshot shows the CONTENTdm Project Client interface. The main window displays the 'View Structure' of a compound object. The structure is shown as a tree view with a folder named 'Second Annual meeting min' containing three sub-items: 'page-1', 'page-2', and 'page-3'. To the right of the tree view is a metadata table with the following data:

Field Name	Field Values
Title	Second Annual meeting minutes of the Capital District Library Council, December 14, 1968
Creator	Brownell, Gladys M.
Date of Original	1968-12-14
Contributors	Capital District Library Council
Publisher of Original	
Description	Minutes of the Second Annual meeting of the Capital District Library Council (CDLC), December 14, 1968. Gladys M. Brownell, recording secretary. Meeting held at Union College Library, Schenectady, N.Y. Mr. Charles Custer introduced as the new Executive Director
Subject.LCSH	
Subject.TGM	
Personal Name	
Corporate Name	
Location	
CDLC DP Topic	
Language	
Coverage	
Original Item.Physical_Description	
Type	

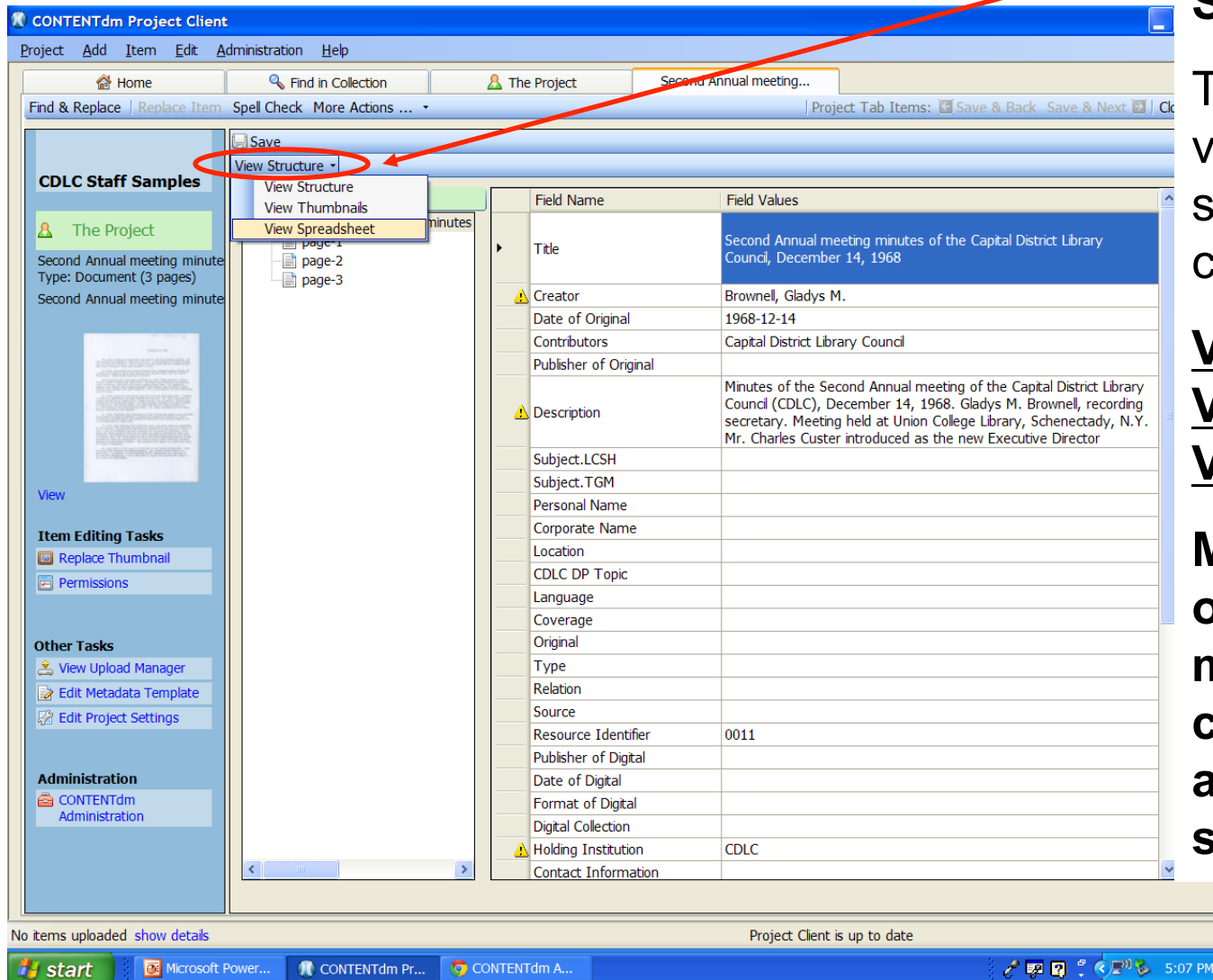
The interface also includes a left sidebar with navigation options like 'Home', 'Find in Collection', and 'The Project'. The bottom status bar shows 'No items uploaded' and 'Project Client is up to date'.

**Click on View Structure.**

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

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

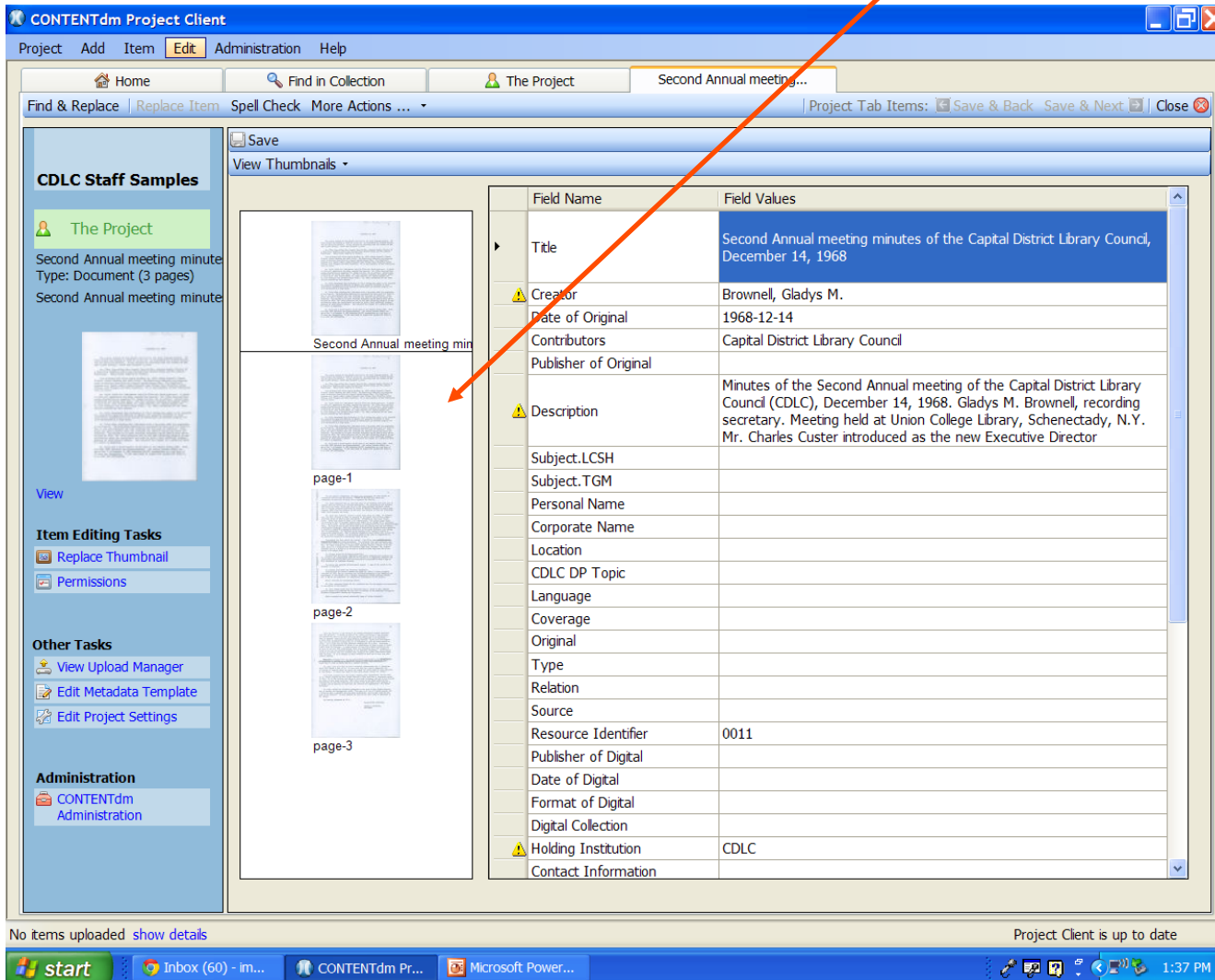
**Metadata for the object and page metadata records can be added in any of the three structure views.**



The screenshot shows the CONTENTdm Project Client interface. The 'View Structure' menu option is circled in red, and a red arrow points to it from the text above. The interface includes a menu bar (Project, Add, Item, Edit, Administration, Help), a toolbar (Home, Find in Collection, The Project, Second Annual meeting...), and a main workspace. The workspace is divided into three main sections: a left sidebar with navigation and task options, a central pane showing a tree view of the object's structure, and a right pane displaying a metadata table.

Field Name	Field Values
Title	Second Annual meeting minutes of the Capital District Library Council, December 14, 1968
Creator	Brownell, Gladys M.
Date of Original	1968-12-14
Contributors	Capital District Library Council
Publisher of Original	
Description	Minutes of the Second Annual meeting of the Capital District Library Council (CDLC), December 14, 1968. Gladys M. Brownell, recording secretary. Meeting held at Union College Library, Schenectady, N.Y. Mr. Charles Custer introduced as the new Executive Director
Subject.LCSH	
Subject.TGM	
Personal Name	
Corporate Name	
Location	
CDLC DP Topic	
Language	
Coverage	
Original	
Type	
Relation	
Source	
Resource Identifier	0011
Publisher of Digital	
Date of Digital	
Format of Digital	
Digital Collection	
Holding Institution	CDLC
Contact Information	

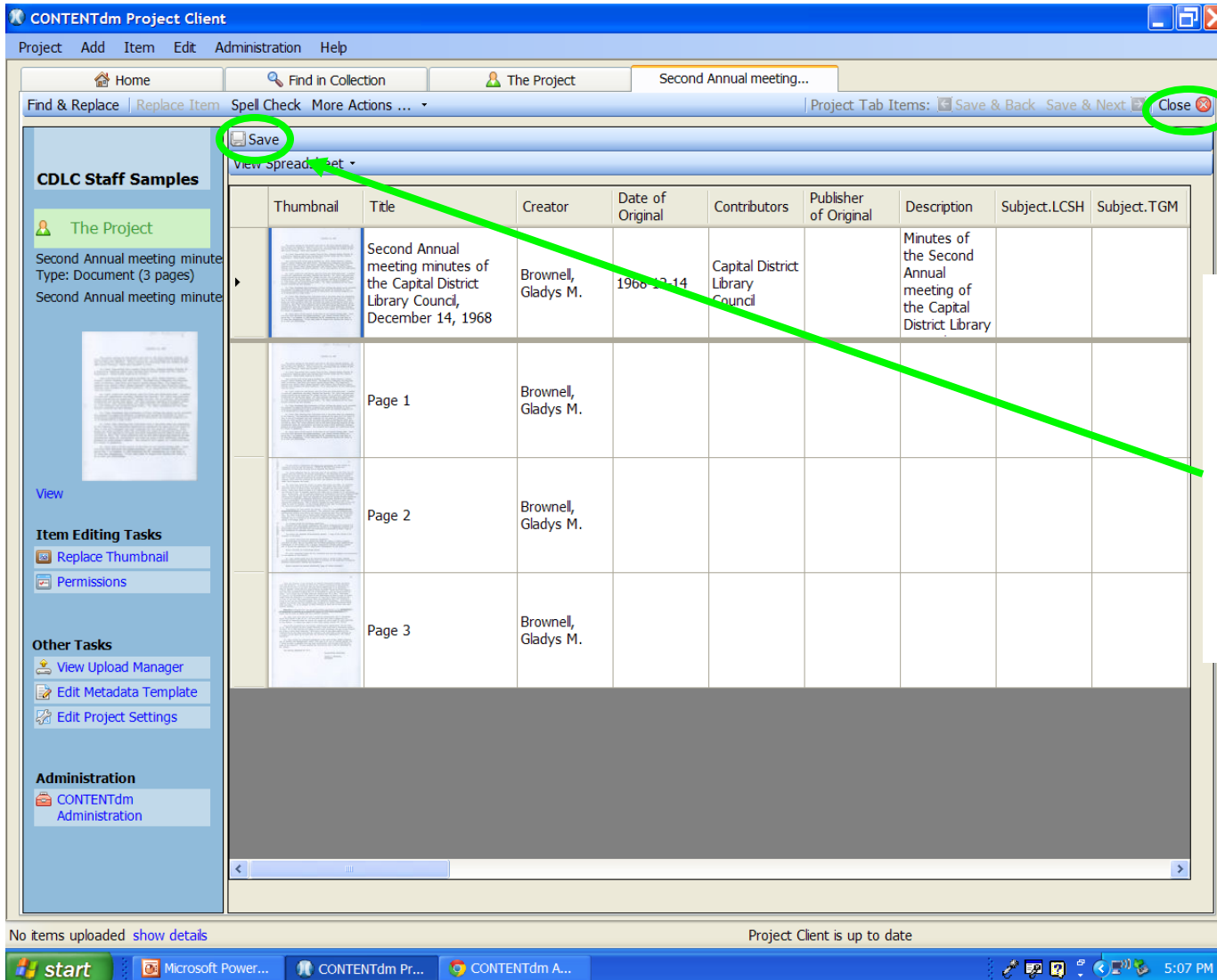
# Thumbnail structure view:



The screenshot shows the CONTENTdm Project Client interface. On the left is a sidebar with navigation options like 'Home', 'Find in Collection', and 'The Project'. The main area is divided into a 'View Thumbnails' section on the left and a 'Field Name' / 'Field Values' metadata table on the right. An orange arrow points from the title 'Thumbnail structure view:' to the thumbnail area.

Field Name	Field Values
Title	Second Annual meeting minutes of the Capital District Library Council, December 14, 1968
Creator	Brownell, Gladys M.
Date of Original	1968-12-14
Contributors	Capital District Library Council
Publisher of Original	
Description	Minutes of the Second Annual meeting of the Capital District Library Council (CDLC), December 14, 1968. Gladys M. Brownell, recording secretary. Meeting held at Union College Library, Schenectady, N.Y. Mr. Charles Custer introduced as the new Executive Director
Subject.LCSH	
Subject.TGM	
Personal Name	
Corporate Name	
Location	
CDLC DP Topic	
Language	
Coverage	
Original	
Type	
Relation	
Source	
Resource Identifier	0011
Publisher of Digital	
Date of Digital	
Format of Digital	
Digital Collection	
Holding Institution	CDLC
Contact Information	

## Spreadsheet Structure view:



CONTENTdm Project Client





Project Add Item Edit Administration Help

Home Find in Collection The Project Second Annual meeting...

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.TGM
	Second Annual meeting minutes of the Capital District Library Council, December 14, 1968	Brownell, Gladys M.	1968-12-14	Capital District Library Council		Minutes of the Second Annual meeting of the Capital District Library		
	Page 1	Brownell, Gladys M.						
	Page 2	Brownell, Gladys M.						
	Page 3	Brownell, Gladys M.						

No items uploaded [show details](#) Project Client is up to date

start Microsoft Power... CONTENTdm Pr... CONTENTdm A... 5:07 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 top navigation bar is highlighted with a red arrow. A callout box points to this arrow with the following text:

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

The main window displays a table with the following data:

Thumbnail	Title	Creator	Date of Original	Contributors	Publisher of Original	Description	Subject.LCSH	Subject.TGM
	Second Annual meeting minutes of the Capital District Library Council	Brownell, Gladys M.	1908-12-14	Capital District Library Council		Minutes of the Second Annual meeting of the Capital District Library Council		