

Exercise 5: Upload Items to the Approval Queue

Before You Begin

To access the Project Client, you will need your CONTENTdm® User Training:

- User Name and Password
- CONTENTdm URL for the Server (<https://server17214.contentdm.oclc.org>)

What you will learn

In this exercise you will learn how to upload individual and groups of processed items. You will review new subject headings and administer the controlled vocabulary.

The Exercise

Open the Project Client if it is not already open on your desktop.

If your Project is not already open in your Project Client session, open it.

1) You should see all the items that you have imported through the **Add** functions.

Uploading items from your Project Client to the CARLI CONTENTdm server is easy!

Click on the small box to the left of the thumbnail image for each item you wish to upload. If you wish to **SELECT ALL** of the items or **CLEAR ALL** of the items, use the submenu option for this.

2) For this exercise, **SELECT ALL** the items in your spreadsheet for upload.

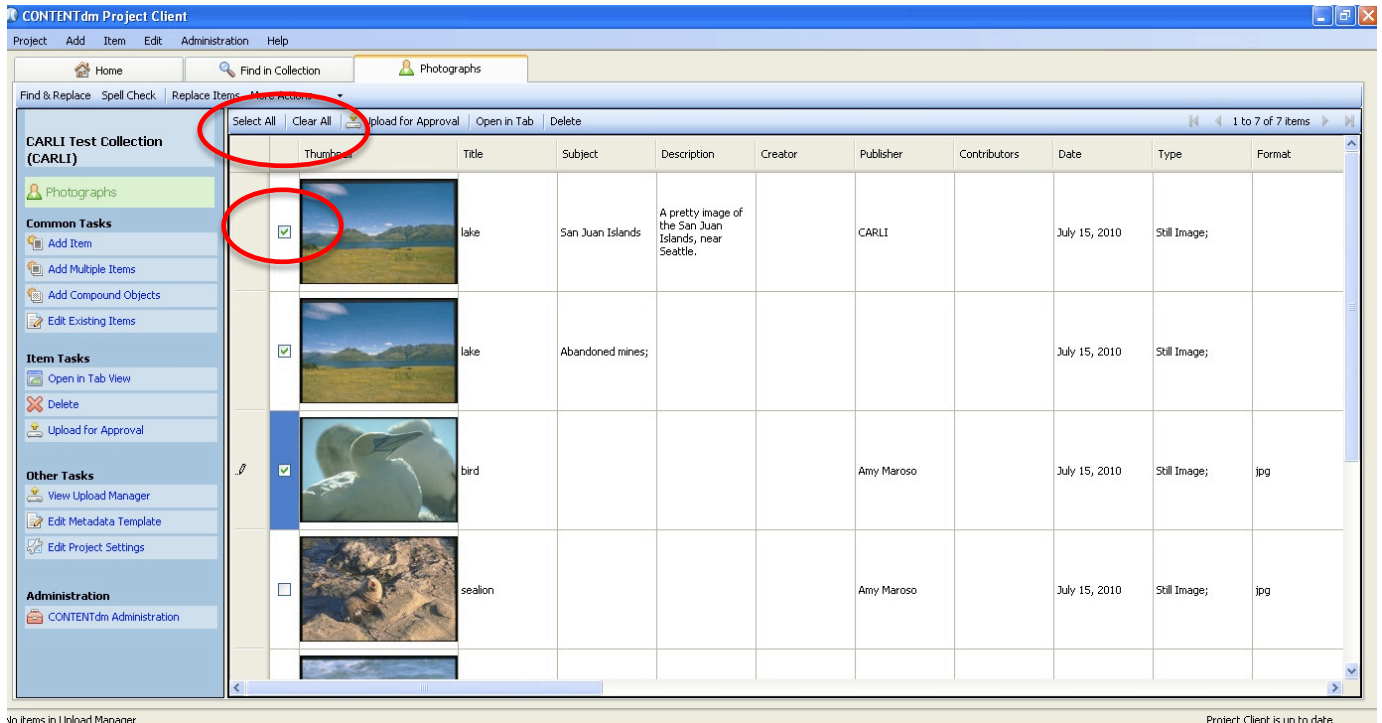


Figure 1 – Selecting items for upload.

Note: Remember that upon upload, items are **removed** from your Project and added to the Collection's pending approval queue on the CARLI CONTENTdm server. Hold back any that may require more work before being approved.

Once you have selected items in your project spreadsheet, new options in the spreadsheet submenu are available to you.

1) To upload items from your Project: Click **“Upload for Approval”** from the submenu.

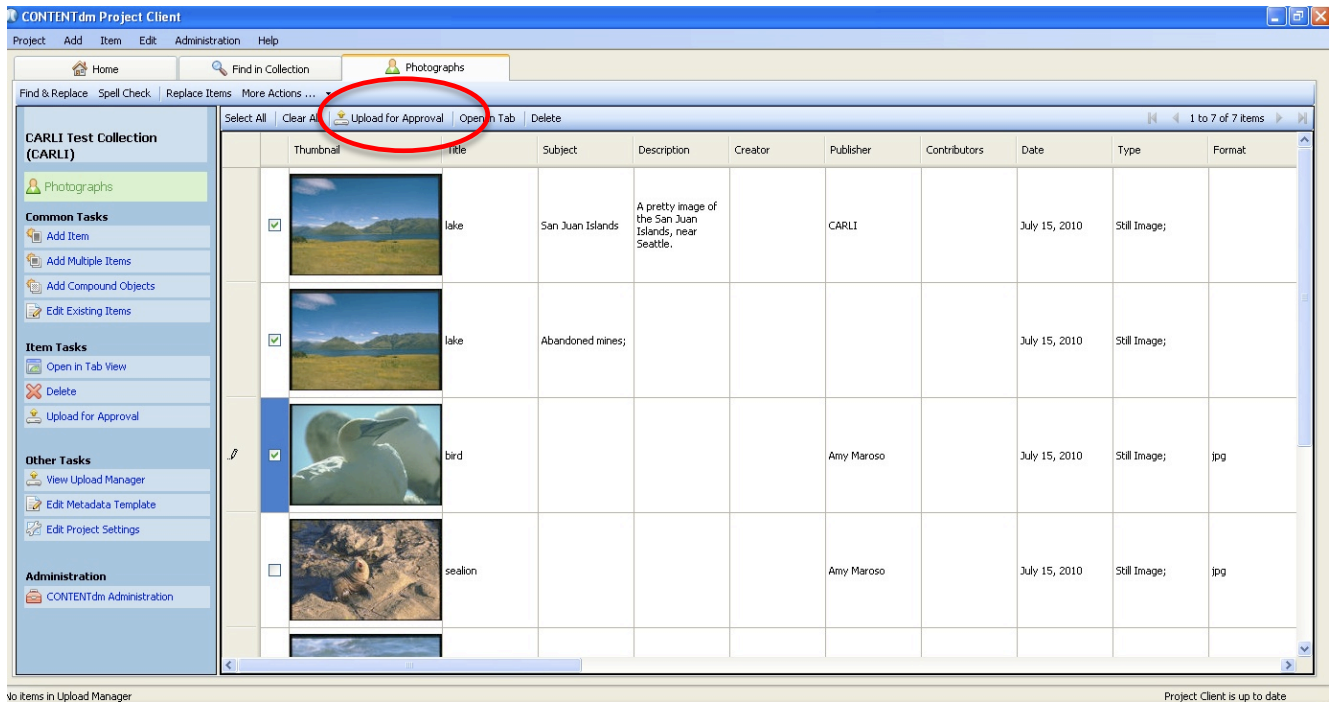


Figure 2: Choosing to upload items using the spreadsheet submenu

2) A **progress bar** at the bottom of the client window shows the progress of the upload.

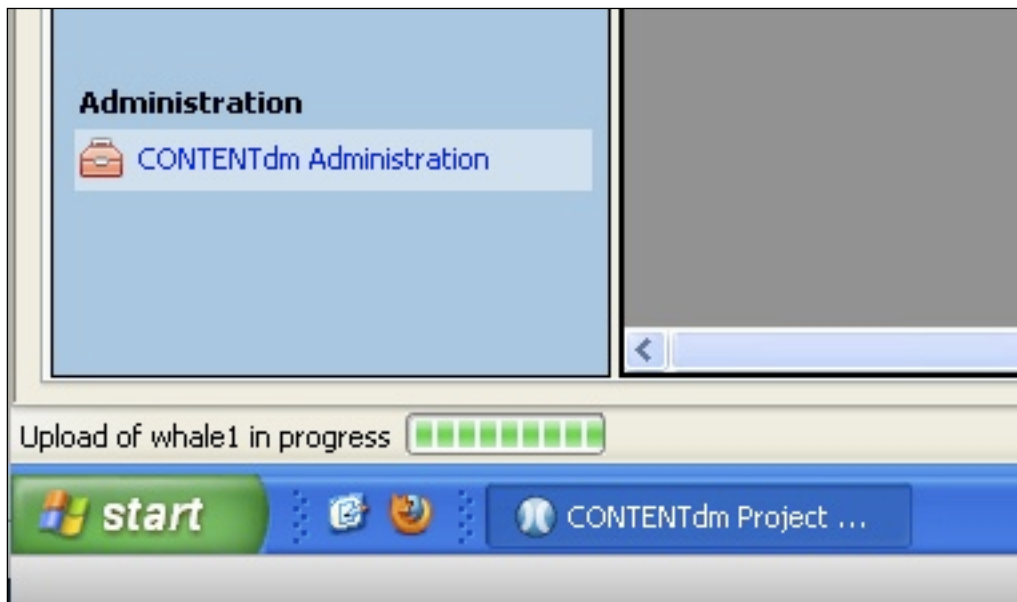


Figure 3: Upload progress bar

OPTIONAL: You have the option of monitoring the status of your upload by viewing the **Upload Manger**. To see the Upload Manager, choose “**View Upload Manager**” from the “Other Tasks” options in the task bar. This can be useful when uploading large files or many items at one time.

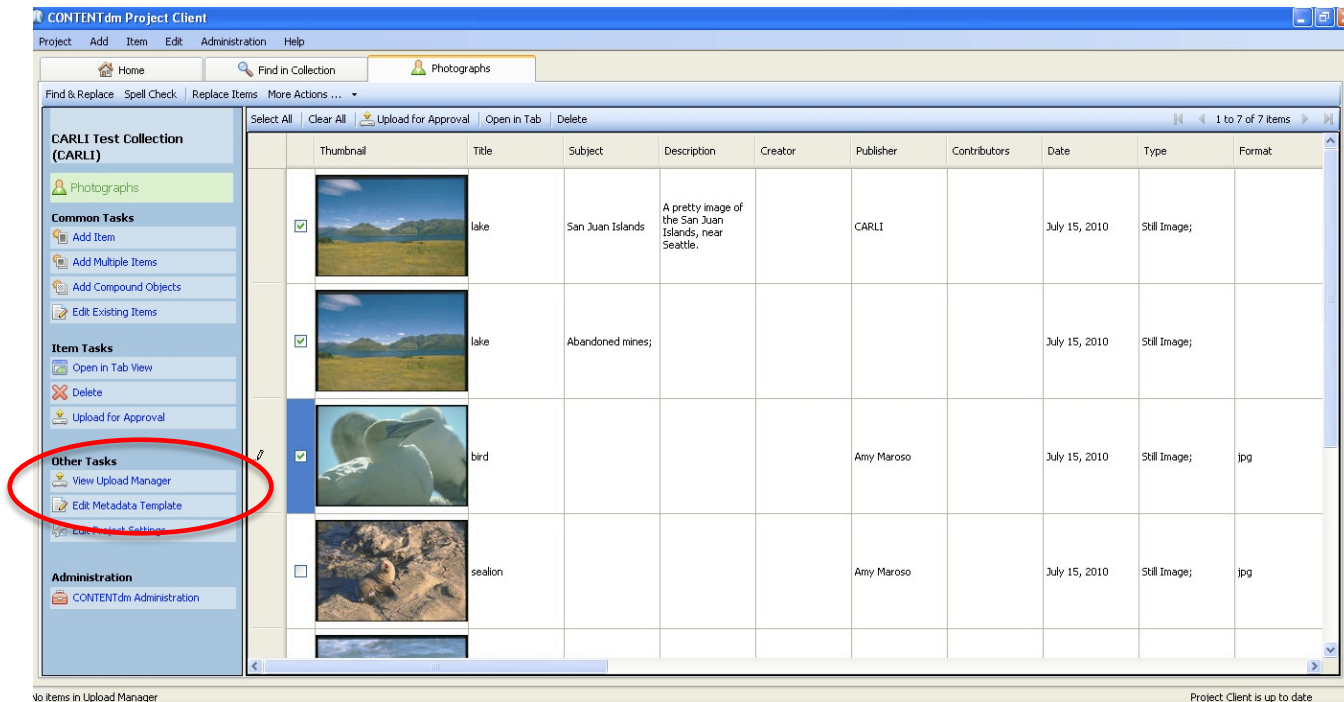


Figure 4: Upload Manager

A **Status** box will monitor the progress of the upload across the network. The size and number of the items, the network bandwidth, and current traffic can all affect the speed of the process.

You can close the Upload Manger by using the red X in its top, right corner:

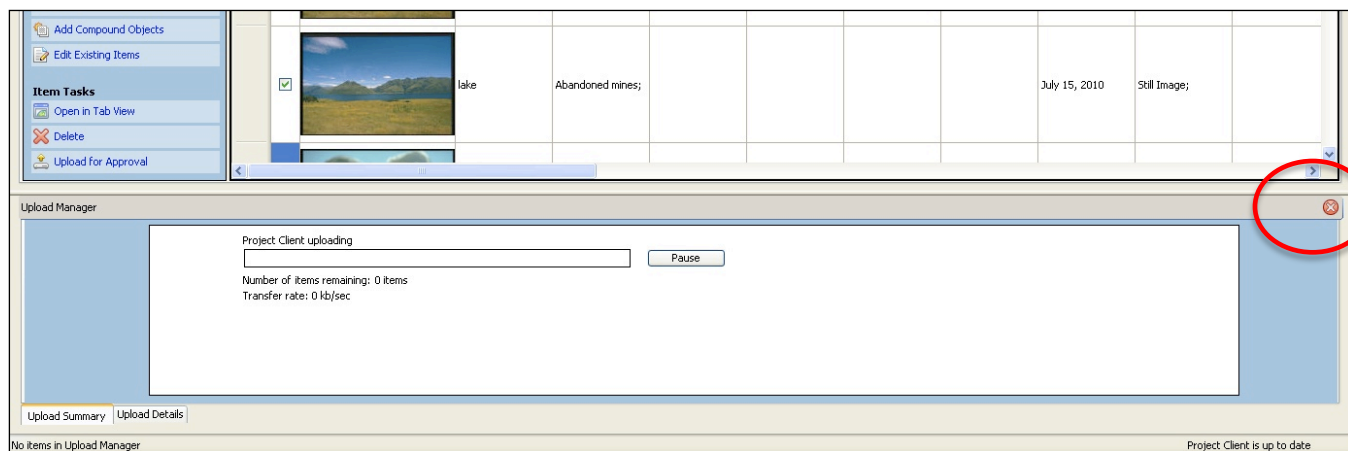


Figure 5: Close the Upload Manager

- 3) When the upload completes, the progress bar at the bottom of the client window will display “No items in Upload Manager”

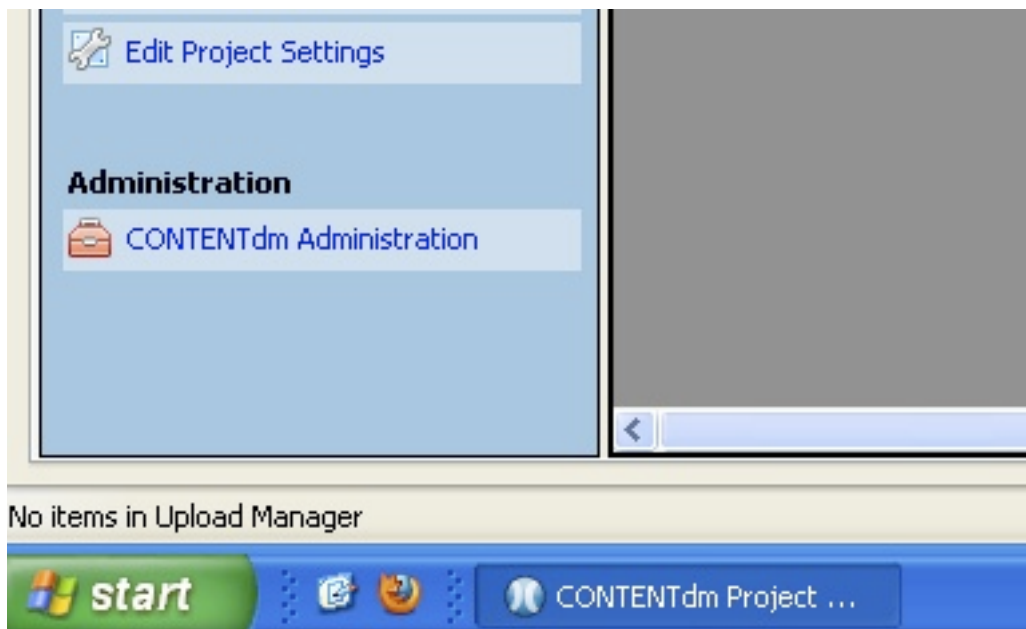


Figure 6: After Upload, status of Upload Manager visible at bottom of client window.

Only items you chose not to upload remain in your project spreadsheet.

IMPORTANT NOTE: When you successfully uploaded items from your project, all but the held items were loaded into a pending queue for approval. **The items do not go directly into a collection.** They must first be added and then the text index must be built. After uploading, and UNTIL the items are approved and the collection is indexed, **UPLOADED ITEMS WILL NOT BE ACCESSIBLE** either in the Project or in the searchable collection.

Review the Pending Queue

1) From the Project Client **Administration** menu, select **Approve**. This will automatically open a web browser and take you directly to the approval queue in CONTENTdm Web Administration. Other options in this menu will take you directly to the Index page, to the general CONTENTdm Administration page, or to a page that will allow you to view your collection as an end-user.

2) You may need to login with your CONTENTdm User Name and password.

NOTE: The window opens to the Collection associated with the open project in your Project Client.

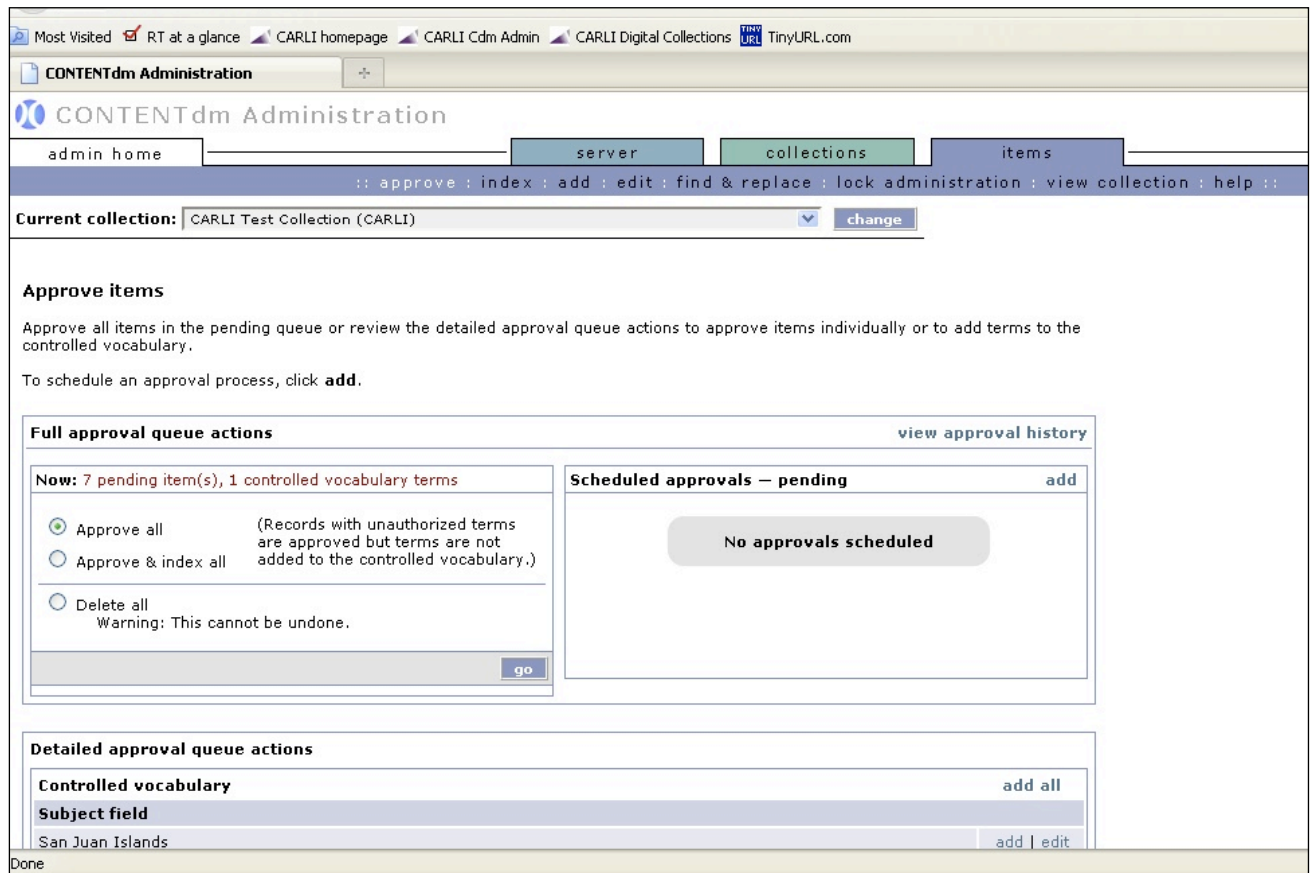


Figure 7: CONTENTdm Web Administration Approval page opens in Items for your Collection

3) You have options!

a. You can perform **Full approval queue actions** on **ALL** the items in your queue—either **Approve all**, **Approve & index all**, or **Delete all**. This will perform the selected function on EVERYTHING in the queue.

Note: Batch delete is protected by a confirmation challenge so that you cannot accidentally delete all items uploaded from a project. REMEMBER THAT PROCESSED ITEMS NO LONGER EXIST IN THE PROJECT CLIENT PROJECT!

b. Approve items **INDIVIDUALLY** using the **detailed approval queue actions**. These actions will allow you to **add terms to your controlled vocabulary lists** and/or **individually EDIT and APPROVE** items in the approval queue.

Full approval queue actions [view approval history](#)

Now: 7 pending item(s), 1 controlled vocabulary terms

Approve all (Records with unauthorized terms are approved but terms are not added to the controlled vocabulary.)

Approve & index all

Delete all
Warning: This cannot be undone.

[go](#)

Scheduled approvals – pending [add](#)

No approvals scheduled

Figure 8: Full approval queue actions act GLOBALLY on all items in your queue.

Detailed approval queue actions

Controlled vocabulary	add all
Subject field	
San Juan Islands	add edit

Reviewing 7 of 7 pending item(s)

Before reviewing items, you should review the unauthorized control vocabulary terms above.

*** Items marked with and asterisk contain unauthorized controlled vocabulary terms.**

approve delete

select: all 7 | none

<input type="checkbox"/> bird	edit
<input type="checkbox"/> whale1	edit
<input type="checkbox"/> sealion1	edit
<input type="checkbox"/> * lake	edit
<input type="checkbox"/> lake	edit
<input type="checkbox"/> sealion	edit
<input type="checkbox"/> whale2	edit

select: all 7 | none

approve delete

Figure 9: Detailed approval queue actions allow you to edit and approve each individual item in the queue.

4) Add your new controlled vocabulary term. If you approve of the new terms and want to include it in your controlled vocabulary list, **ADD** the term before you approve/index the collection. By adding the term first, it will be saved to the controlled vocabulary for this collection and will not prompt any action the next time the term is used.

Detailed approval queue actions

Controlled vocabulary	add all
Subject field	
San Juan Islands	add edit

Figure 10: Add the new term to your controlled vocabulary list for this collection.

5) Choose Approve & index all from the Full approval queue. This will automatically approval all pending items and index the collection.

Current collection: CARLI Test Collection (CARLI) change

Index
 Index the collection after you have added or deleted items, or changed metadata within a collection. Indexing may take several minutes.
Note: All times shown are in CDT.

Index status

Indexing...
 You cannot start another index until completion
 Started: 2010-07-20 at 12:53

Scheduled indexes – pending

- Index once: 2010-07-20 at 12:53 cancel

Index history see all

- 2010-07-20, 12:48:08: Duration: 00:03:59
Items in index: 39
- 2010-06-08, 11:14:53: Duration: 00:00:05
Items in index: 32
- 2010-06-08, 11:03:42: Duration: 00:03:48
Items in index: 28

Index scheduler

Immediate indexing
 Start the index process now to update your collection without scheduling.

index now

Scheduled indexing
 Schedule one-time or recurring index processes to index the collection automatically at a planned time.

Once on 2010-07-20 at 13:00

Recurring at 1:00

Daily
 On the selected days:
 Monday
 Saturday
 Tuesday
 Sunday

Figure 11: Items have been approved and collection in indexing.

CONTENTdm Administration

admin home server collections items

:: approve : index : add : edit : find & replace : lock administration : view collection

Current collection: CARLI Test Collection (CARLI) change

Index
 Index the collection after you have added or deleted items, or changed metadata within a collection. Indexing may take several minutes.
Note: All times shown are in CDT.

Index status

Last index successful
 Started: 2010-07-20, 12:53:08

Scheduled indexes – pending

No indexes scheduled

Index history see all

- 2010-07-20, 12:53:08: Duration: 00:00:01
Items in index: 39
- 2010-07-20, 12:48:08: Duration: 00:03:59
Items in index: 39
- 2010-06-08, 11:14:53: Duration: 00:00:05

Index scheduler

Immediate indexing
 Start the index process now to update your collection without scheduling.

index now

Scheduled indexing
 Schedule one-time or recurring index processes to index the collection automatically at a planned time.

Once on 2010-07-20 at 13:00

Recurring at 1:00

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 On the selected days:
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Figure 12: Index successful!

6) When indexing is complete, the message will read: **“Last index successful” with the appropriate date and timestamp.**

NOTE: When items are added to the collection from the Project Client—either by adding NEW items or EDITING existing items—they need to be **APPROVED and INDEXED**. When making editing changes through CONTENTdm Web Administration such as editing metadata, deleting items, or making certain other changes to the collection, the collection will only need to be **INDEXED**. Oftentimes the software will prompt you when you need to index the collection.

If you have made a change to your collection and don't see it appearing when you view the collection through a web browser, chances are you forgot to index the collection. As our CONTENTdm motto goes: **When in doubt, index!**

6) You may then choose to use the **“View Collection”** link in CONTENTdm Web Administration to view the collection as an end-user would see it, you will need to use your user name and password to log into the collection, since Test collections are unpublished. You will always need to log in to see unpublished collections. Collections that have been published do not require this step.

