# OCLC Project Client Training for RWDI

*Updated January 2026*

## Resources

- OCLC Documentation - CONTENTdm and Project Client
- OCLC CDM Live and Recorded Training Sessions
- CDM Basic Skills: Sections 3-6
- Content Partner Resources, Recollection Wisconsin - includes the harvest and ingest calendar for DPLA and RW.
- Recorded training (Jan 12, 2026)

**When you are ready for your collection to be harvested** by Recollection Wisconsin, let us know at info@recollectionwisconsin.org! The collection does not need to be fully complete - just complete enough to your liking. New, edited, or removed resources will be updated automatically with subsequent harvests.

## Instructions for getting an LDAP account and installing the Project Client

1. You will need an LDAP account to use the Project Client and access the CONTENTdm server. If you don't already one, set up an LDAP account at https://ldap-accounts.oclc.org/create. You can set up an individual account with your name, or a generic/institutional account that multiple staff could use.
2. **Send Recollection Wisconsin (info@recollectionwisconsin.org ) or your direct Recollection Wisconsin contact your LDAP username** so we can link your account with your collection. You will not be able to access your collection in step 5 below until that info is shared.
3. Install and set up the Project Client. Download the program files at https://help.oclc.org/Metadata_Services/CONTENTdm/Project_Client/Project_Client_overview/Download_the_Project_Client. Scroll to the bottom of the page and check the box to accept the Terms and Conditions, then the install link will appear.
4. If asked, input this license number: 66L9E-SJM3B-ZL3A5-NJE8L. Installation should be complete and you can open the Project Client.
5. Create a Project linked to the OCLC CONTENTdm server. Choose Project --> New. Then input this server URL: https://server16698.contentdm.oclc.org and your LDAP username and password.

## After Training Checklist - Simple Objects

*Update your metadata template*

1. Complete the metadata template for the resources you intend to upload where the first row names the fields and subsequent rows provide metadata for each record.
2. Make sure that the file names are in the final column and that they match exactly the file names of the item the row describes. Four-letter file extensions (.tiff, .jpeg) will cause errors.
3. Convert the template you are working on to a tab-delimited txt file. Open the file and check for suspicious characters, dangling rows at the end of the document, empty columns at the end of each record, misinterpreted formatting in the date field, or anything else that looks unusual.

*Create a directory of files*

1. Add all files named in the final row of the spreadsheet to a single folder.
2. If the files are very large, consider saving them as a different file type (tif to jpg, for instance) or otherwise reducing their size or uploading in batches.

*Upload to the Project Client*

1. Once the Project Client is open, create a new project and name it. You will have to log in at this point. **Be sure to select your collection from the dropdown list.**
2. Click "Edit Project Settings" on the Home tab.
    a. Click "Metadata Template" then edit the Project Template (general) to add default values to metadata fields, such as your institution name for Submitter.
    b. Click "Processing" to make sure that "Convert Multiple Page PDFs to Compound Objects" is selected
    c. Click "OCR" to enable optical character recognition for your uploaded files. Ask Recollection Wisconsin for a license key if you don't already have one.
3. Click the Home tab and "Add Multiple Items."
4. Select the option to “Import using a tab-delimited text file” and click Browse to point to the tab-delimited text file that contains your metadata. Click Next.
5. Browse to the directory where your files are saved in the “Import files from a directory” field. Select Next.
6. Click no for generating display images. Click Next.
7. Map the metadata fields from the template to the correct fields for your collection. Click Next and then Add Items.
8. Resolve any errors with mismatching controlled vocabularies, field types, etc.
9. Once the upload is complete, the records and files should appear in the project tab of the Project Client. Review to make sure everything looks as it should.

10. Select the record(s), and then select "Upload for Approval." You can see the progress of the upload by selecting "Show Details" in the bottom left part of the Project Client.
11. Once uploaded for approval, click "CONTENTdm Administration" from the bottom of the left hand navigation menu; log on using the same credentials if prompted.
12. Go to Items -> Approve to approve the upload. If there are controlled vocabulary terms to add, review and click Add. If you would like, you can review the uploaded records again here before they are uploaded. Select Approve Now.
13. After the approval is complete, go to Items -> Index to index the items. Wait for the indexing process to complete.
14. Go to your local collection to make sure the upload was successful and looks good. You can edit individual items through the CONTENTdm Administration or through the Project Client to correct any errors.

**After Training Checklist - Compound Objects using Compound Object Wizard (uploads one compound object at a time - used when each page in a compound object should have distinct metadata)**

*Update your metadata template*

1. Complete the compound object metadata template for one record where the first row names the fields, the second provides metadata for the object (book), and subsequent rows provide metadata for the items (pages).
2. Make sure that the file names are in the final column and that they match exactly the file names of the pages the row describes. Four-letter file extensions (.tiff, .jpeg) will cause errors.
3. Convert the tab you are working on to a tab-delimited txt file. Open the file and check for suspicious characters, dangling rows at the end of the document, misinterpreted formatting in the date field, or empty columns at the end of each record.

*Create a directory of files*

1. Add all files for the object to a single folder
2. If the files are very large, consider saving them as a different file type (tif to jpg, for instance) or otherwise reducing their size.

*Upload to the Project Client*

1. When you log in, **be sure to select your collection from the dropdown list.**
2. Once the project is open, click the Home tab and "Add Compound Objects"
3. With "Compound Object Wizard" selected in the dropdown on the Import Objects tab, select Add.
4. Select "Document" and "Yes" for the question about the compound objects being in a text file. Select Next.
5. Browse to the tab-delimited text file that contains your metadata in the top section of the pop-up.
6. Browse to the directory where your files are saved in the bottom section. Select Next.
7. Click no for generating display images. Click Next.
8. Specify page names as you prefer, add a transcript, or opt to use OCLC's OCR processes when you upload. If you would like to use the OCR feature, please connect with Recollection Wisconsin for OCR access information. If you have an OCR license enabled and you'd like to use it, select "Generate Transcripts Using OCR"
9. When the upload is complete, select the Map Fields tab and map the fields from the template to the correct fields for your collection. Click Finish and wait for uploading to complete.

10. Once the upload is complete, the records and files should appear in the project tab of the Project Client. Review to make sure everything looks as it should.
11. Select the record(s), and then select "Upload for Approval." You can see the progress of the upload by selecting "Show Details" in the bottom left part of the Project Client.
12. Once uploaded for approval, click "CONTENTdm Administration" from the bottom of the left hand navigation menu; log on using the same credentials if prompted.
13. Go to Items -> Approve to approve the upload. If there are controlled vocabulary terms to add, review and click Add. If you would like, you can review the uploaded records again here before they are uploaded. Select Approve Now.
14. After the approval is complete, go to Items -> Index to index the items. Wait for the indexing process to complete.
15. Go to your local collection to make sure the upload was successful and looks good. You can edit individual items through the CONTENTdm Administration or through the Project Client to correct any errors.

## After Training Checklist - Compound Objects using Object List (uploads multiple compound objects at once - used when individual pages within an object will not have distinct metadata)

*Update your metadata template*

1. Complete the compound object metadata template for one record where the first row names the fields and subsequent rows provide metadata for each object. Note: This method cannot be used to add metadata at the page or item level.
2. Make sure that the folder names are in the final column and that they match exactly the folder names for each compound object described.
3. Convert the tab you are working on to a tab-delimited txt file. Open the file and check for suspicious characters, dangling rows at the end of the document, misinterpreted formatting in the date field, or empty columns at the end of each record.

*Create a directory of files*

1. Add all folders for the objects to a single directory.
2. If files are very large, consider saving them as a different file type (tif to jpg, for instance) or otherwise reducing their size.

*Upload to the Project Client*

1. When you log in, **be sure to select your collection from the dropdown list.**
2. Once the project is open, click the Home tab and "Add Compound Objects"
3. With "Object List" selected in the dropdown on the Import Objects tab, select Add.
4. Select "Document" and "Yes" for the question about the compound objects being in a text file. Add the directories where the metadata template and the object folders are located. Select Next.
5. On the next pop-up, select the field that contains the object folder names.
6. Click no for generating display images. Click Next.
7. Specify page names as you prefer, add a transcript, or opt to use OCLC's OCR processes when you upload. If you would like to use the OCR feature, please connect with Recollection Wisconsin for OCR access information. If you have an OCR license enabled and you'd like to use it, select "Generate Transcripts Using OCR"
8. Click Add and confirm the number of objects is correct.
9. Select the Map Fields tab and map the fields from the template to the correct fields for your collection. Click Finish and wait for uploading to complete.
10. Once the upload is complete, the records and files should appear in the project tab of the Project Client. Review to make sure everything looks as it should.
11. Select the record(s), and then select "Upload for Approval." You can see the progress of the upload by selecting "Show Details" in the bottom left part of the Project Client.

12. Once uploaded for approval, click "CONTENTdm Administration" from the bottom of the left-hand navigation menu; log on using the same credentials if prompted.
13. Go to Items -> Approve to approve the upload. If there are controlled vocabulary terms to add, review and click Add. If you would like, you can review the uploaded records again here before they are uploaded. Select Approve Now.
14. After the approval is complete, go to Items -> Index to index the items. Wait for the indexing process to complete.
15. Go to your local collection to make sure the upload was successful and looks good. You can edit individual items through the CONTENTdm Administration or through the Project Client to correct any errors.

## Grrr! Common Errors or Problems

1. **Your txt file containing your metadata has empty ("ghost") rows or columns.** Open your txt file and attempt to place your cursor below the last row of data. If you can highlight blank rows, either delete them in the txt file or open your original spreadsheet, copy just the cells with data to a new tab, and save that tab as your txt file. You will still want to check your next txt file for "ghosts."
2. **The batch of files you are attempting to upload is too big.** Break your batch into smaller pieces, instead. This is an issue that involves both the number of items you are trying to upload and the size of those files so you may have to experiment to find the right batch size for your items.
3. **There is a discrepancy between the named file in your spreadsheet and the name of the file in the directory, or it is missing from the directory.** The last column in your spreadsheet should exactly match the file name in the chosen directory (including capitalization and file extensions) and all files named in the spreadsheet should be in the same directory.