6.3

Luna Imaging Inc.

Insight[®] + LUNA

Insight 6.3 User's Guide to Basic Collection Building

Luna Imaging Inc.

Insight[®] + LUNA

This document contains information proprietary to Luna Imaging, Incorporated (Luna). This document is provided to you as part of the Luna Imaging, Inc. licensed software and is governed under the same licensing restrictions that apply to that license. You may reproduce this documentation, which contains Luna Imaging, Inc. proprietary information for use within your organization. You may not disclose or distribute this documentation to third parties.

Even though Luna has tested the hardware and software and reviewed the documentation, Luna makes no warranty or representation, either express or implied, with respect to the hardware, software, or documentation, their quality, performance, merchantability, or fitness for a particular purpose. Luna has made every effort to keep the information in this manual current and accurate as of the date of publication or revision. However, Luna does not guarantee or imply that this document is error free or accurate with regard to any particular specification.

In no event will Luna be liable for direct, indirect, special, incidental, or consequential damages resulting from any defect in the hardware, software, or documentation, even if advised of the possibility of such damages. In particular, Luna shall have no liability for any programs or data stored in or used with Luna products, including the costs of recovering such programs or data.

No Luna agent, dealer, or employee is authorized to make any modification, extension, or addition to the above statements.

All copyrights and trademarks belong to their respective holders. Insight and Inscribe are registered trademarks of Luna Imaging Inc.

©2010 luna imaging, inc. 2702 Media Center Drive los angeles, california 90065 phone 800.452.LUNA (5862) • fax .323.908.1441 www.lunaimaging.com

TABLE OF CONTENTS	
INSIGHT AND LUNA ARCHITECTURE	
LUNA Components are as follow:	
Insight's Components are as follow:	
MANAGING USERS AND ACCESSING COLLECTIONS	7
GRANTING ACCESS TO INSIGHT STUDIO	7
Enabling Insight Studio Access to a Collection Manager	7
Adding a User to the User Manager	
Enabling Insight Studio Access to a User Manager	
INSIGHT STUDIO USER MANAGEMENT	
Insight User Management Concepts	
Managing Users	
Adding a User	
Assigning a User to a User Group	
Adding a User Group	
Default Profile Privileges	
Creating New Profiles Using the Insight Administrator Tools	
Inscribe Profile Privileges Insight Shares	
MULTI-COLLECTION ACCESS	
CREATING A CATALOG TEMPLATE	
Common terms	
Catalog Template Field	
Field Group	
Independent Records (An Authority record)	
Dependent Records	
Controlled Vocabularies	
Catalog Template Tools	
CREATING A FLAT CATALOG TEMPLATE	
CREATING A CATALOG TEMPLATE WITH RELATIONS	
General Rules for Field Groups	
Steps	
Field Group Types	
Field Types	
Date Long Text and Short Text	
Numeric	
Required	
MODIFYING AN EXISTING CATALOG TEMPLATE	
Steps	
CREATING A NEW COLLECTION	
CREATING AN INSTITUTIONAL COLLECTION	
ADDING YOUR COLLECTION TO LUNA	
CREATING A VIRTUAL COLLECTION	
MANAGE VIRTUAL COLLECTION CONTENT	
ADDING CONTENT TO A COLLECTION	53
WORKFLOW #1: ADDING CONTENT WITH IMPORTED DATA	
Importing Data	
Importing Media	
WORKFLOW #2: ADDING CONTENT WITHOUT IMPORTING DATA	
Importing Media	
Adding Data in Inscribe	
Cataloging Records by Hand	
Mapping Data to Media with Inscribe	

INSIGHT AND LUNA ARCHITECTURE

Insight has a dynamic multi-tier architecture built on the client-server model which allows it to adapt to an institution's needs and requirements.

Figure 1: Insight and LUNA Component Diagram



LUNA Components are as follow:

LUNA Publisher: Schedules and is used to pull data out of the Insight Collection Manager, storing it in an XML format. The LUNA Publisher then converts the archive data into a Lucene index for each collection and merges all Collection indexes into one single search index. Once merged, the LUNA Server is placed into a maintenance mode and the newly merged index replaces the existing one.

LUNA is the dynamic web based front end to Insight collections. With LUNA, users can perform simple keyword searches as well as more complex structured queries, and control how they view, browse, and organize their results to create groups and presentations. LUNA includes the Web 2.0 tools your users are demanding which enable them to save and share their work by linking and embedding any view, image, group, or presentation.

Insight's Components are as follow:

User Manager: The User Manager functions as a single point of entry for all Insight Collections and Personal Insight Managers. It consolidates the functions of authentication and authorization for all shared resources within Insight and for LUNA. The User Manager can integrate with an existing security infrastructure if an institution already has a single sign-on solution in place. The User Manager also provides access to resources such as shared folders and groups within Insight. LUNA enables end-user management of viewing preferences, and storage folders for media groups and presentations.

Collection Manager: The Insight Collection Manager provides a common interface between client requests and the underlying data repository. Each Collection Manager may contain multiple collections and Virtual Collections of consistent or heterogeneous structures. The Collection Manager also functions as a broker between the clients (the Insight Java Client, Inscribe data editor, Studio (LUNA Publisher and XML Gateway) and the underlying database, coordinating search requests, and data updates.

Personal Insight Manager: The Personal Insight Manager is a specialized version of the Collection Manager which supports the creation of Personal Collections with the Insight Java Client.

Media Manager: The Insight Media Manager is built around a basic JSP Server, and manages access to Insight's media content. The Media Manager supports direct upload of processed content and also manages access to the JPEG2000 wavelet images that power Insight's Image Workspace.

Insight Browser & Java Clients: The Insight Browser and Java Clients are the core of Insight. They provide the end-user interface for searching, viewing, and managing images, audio, video, and other media. These clients provide unique tools to interact with visual content. The Java Client also provides end-user collection building tools with Personal Insight and the ability to create Virtual Collections – a subset of content with different access levels.

Inscribe®: The optional Inscribe data editor is an end-user cataloging tool designed to support all of an institution's cataloging needs. The Inscribe data editor includes built-in support for controlled vocabularies, date and numeric validation, and complex data relationships. Inscribe also supports an institution's workflow requirements by facilitating the publishing and review processes.

Studio: Studio provides collection administrators with the tools to build and manage collections. Studio is a wizard-based tool supporting batch processing of media, batch import of metadata, user management, catalog template creation and management, and other basic functions. The **LUNA Publisher** is accessible from within the Studio client.

Administrator Tools: The Insight Administrator Tools allow a collection administrator to dynamically manage collections. Components of the Insight Administrator Tools include tools for batch media processing, user and resource management, data indexing, and configuring of the search and user interface.

JPEG2000 Wavelet Encoder: The Administrator Tools and Studio include a JPEG2000 Wavelet Encoder. Wavelet encoded images improve performance when accessing large images, reduce storage requirements, and optimize network usage on image delivery.

Insight XML Gateway: The XML Gateway provides a web-services based interface for searching and retrieving content stored within Insight collections. The XML Gateway is middleware which allows backend interaction between Insight and other XML aware applications.

Managing Users and Accessing Collections

This chapter discusses how to grant different levels of access privileges to various Insight users. Managing these privileges is done within Insight Studio and the Insight Administrator Tools.

GRANTING ACCESS TO INSIGHT STUDIO

By default, when a new Insight system is installed, the administrator account created during installation is granted access privileges to Insight Studio and the Insight Administrator Tools.

The next section discusses how to give access to other types of users.

Enabling Insight Studio Access to a Collection Manager

1. Open Insight Administrator Tools.

2. Connect to the Collection Manager you want to grant access to by right-clicking (control-click on the Mac) on the Collection Manager name and selecting **Connect**.



3. Select Server Settings, right-click on Admin Accounts, and click New.



4. Enter the username and password you wish to add and select **Insight Studio Access**. If you would also like to grant access to delete collections, select **Insight Studio Collection Delete**, and click **Save**.

💼 Edit Admin Account - 🚿	<u> X</u>
Username:	Pat
Password:	****
Server Admin Permissions:	🗌 Read
	🗌 Edit
	🗌 Add
	🗌 Delete
	Collection Editor
	✓ Insight Studio Access
	Insight Studio Collection Delete
Account Admin Permissions:	Read
	🗌 Edit
	🗌 Add
	Delete
Save	Cancel

Adding a User to the User Manager

Once the Administrator User has the appropriate permissions in the Collection Manager, you must confirm that there is a matching user in the User Manager.

To confirm that the user is defined in the User Manager:

- 1. Open Insight Administrator Tools.
- 2. Connect to your User Manager by right-clicking on the User Manager name and selecting **Connect**.
- 3. Select **Users** and look for a matching user name.



- 4. If you do not find a matching username for your administrative user, add one by right-clicking on **Users** and click **New**.
- 5. Enter the same username and password that match the administrative user in the Collection Manager followed by a First Name and Last Name.

📔 Edit User -	
Username:	pat
Password:	luna
First name:	Pat
Last name:	Doe
Organization:	Luna Imaging Inc
E-mail:	odoe@luna-img.com
Phone:	
Address:	
City:	
State:	
Postal code:	
Country:	
Available Au	thentication Groups Assigned Authentication Groups
Demo-1-Adr	nin >
	Save Cancel

6. Insight Studio only verifies a valid username and password during login, so you do not need to assign Authentication Groups. Click **Save**.

Enabling Insight Studio Access to a User Manager

- 1. Open Insight Administrator Tools.
- 2. Connect to your User Manager by right-clicking on the user manager name and selecting **Connect**.



3. Right-click on **Admin Accounts** and click **New**.

🧱 Control Panel - Main		
🛅 Console Root	Admin Name	Created
🗗 з User Managers	lunaadmin	Wed 15 Dec 2004 12:00:00
🗄 🔂 quick start UM (lunaadmin)		
- 📄 Admin Accounts		
– 🛄 Users New		
– 🦳 User Groups		

4. Enter the user you wish to add and select **Insight Studio Access**. If you would also like to grant access to delete collections, select **Insight Studio Collection Delete** and click **Save**.

🛅 Edit Admin Account - 🎆	_ 🗆 🗵
Username:	pat
Password:	****
Server Admin Permissions:	Read
	🗌 Edit
	Add
	Delete
	✓ Insight Studio Access
	🗌 Insight Studio Collection Delete
Account Admin Permissions:	🗌 Read
	🗌 Edit
	🗌 Add
	Delete
Save	Cancel

You must have access to a collection through Insight Studio to manage user access to that collection.

INSIGHT STUDIO USER MANAGEMENT

Once a collection is created in Insight Studio, you can manage access to that collection and create "shares" (network shared work areas) for other users to access your collection.

Insight Studio only allows you to perform user management for the collection you are currently working in. More advanced user management, such as multi-collection access and collection profile management will be discussed later.

Insight User Management Concepts

To manage Insight users, you will need to be familiar with the following concepts: user, user group, and profile. The following diagram illustrates the relationship between these concepts:



User: An Insight user as defined in the User Manager

User group: Made up of a Group Name and Access Key (Code Key). These two elements control access between a User Manager and a Collection Manager.

For example: A User Group and Access Key on the User Manager "MyUserGroup/MyAccessKey" must have a matching User Group and Access Key on the Collection Manager or users belonging to either User Group will be denied access to the collection.

Profile: Sets the level of privileges available to a user for a collection

Managing Users

Log on to Insight Studio and select your collection. Select **Manage User Access** in the Task Menu.



Adding a User

1. Click Add.

2. Fill in the form (minimum requirements: Log-in Name, First Name, Last Name, and Password) and click **OK**.

Properties - New Use	ir
eneral Member Of	Share Access
Log-in Name:	jdoe
First Name:	John
Last Name:	Doe
Password:	••••
Re-enter Password	d: ****
Organization:	
E-mail:	
Telephone:	
Address:	
City:	
State:	
Zip Code:	
Country:	

Assigning a User to a User Group

There are two ways to do this:

1. Select **Manage User Access** from the Insight Studio Task Menu. Select **Users** from the Access Type menu, then select the user from the User Name list in the right panel and click **Properties**.



a. Select the Member Of tab.

- b. Click Add.
- c. Select the User Group you would like to assign.
- d. Click OK.
- e. Click **OK** again in the User Properties panel.
- f. You will be asked to save the changes. Click Yes.
- Select Manage User Access from the Insight Studio Task Menu. Select User Groups from the Access Type menu, then select the User Group from the User Groups list in the right panel and click Properties.



- a. Select the **Members** tab.
- b. Click Add.
- c. Select the user or users you would like to add.
- d. Click OK.
- e. Click **OK** again in the Group Properties panel.
- f. You will be asked to save the changes. Click Yes.

Adding a User Group

To add a User Group, you will need to add it to both the User Manager and the Collection Manager.

In the Insight Studio Task Menu, you will need to add the User Group using both the **Manage User Access** and the **Manage Collection Access** tools.



Adding a User Group with the Manage User Access Tool

- 1. Log on to Insight Studio and select the collection you would like to add a User Group to.
- 2. Click Manage User Access in the Insight Studio Task Menu.
- 3. Select **User Groups** in the Access Type panel.

Trenght Studio Demo File Task Window H				all a
Access & Permissions				
Select Users, User Gro Access Type: Users User Groups Shares	oups or Shares t Type M	Demo-1-Adm PCDEFAULT	Group Properties - New UX General Members Group Name: Display Name: Access Key: Description:	
Properties Add	Remove	i i i		ок

- 4. Click Add.
- 5. Enter a **Group Name** and **Access Key (Code Key)**. Optionally, you can add a **Description** and a **Display Name**. A Display Name will show in the collection selection panel of Insight and Inscribe. This is not recommended for public display.
- 6. Click **OK**.
- 7. Click **Yes** in the confirmation window.

Adding a User Group with the Manage Collection Access Tool

1. Log on to Insight Studio and select the collection you would like to add a User Group to.

2. Click Manage Collection Access in the Insight Studio Task Menu.

File Task Window Help			
Collection Access			
Iser Groups	User Group Properties	\$	
Demo-1-Admin	General Name: Profile: Access Key:	Demo-Public Demo-1-General aBc123	-
New	1		ок

- 3. Click New.
- 4. Enter the Group Name and Access Key (Code Key).
- 5. Select a Profile (see details below).
- 6. Click OK.
- 7. Click **Yes** to apply your edits locally.

	Save Collection Level Media Groups	Delete Collection Level Media Groups	Max Image Export Resolution in Pixels	Max Presentation Export Screen Resolution	Export HTML	Edit Annotations & Links	Edit Multi- View Images	Edit Multi- Page Documents
Admin	YES	YES	<24576	1600 x 1200	YES	YES	YES	YES
Editor	YES	YES	<24576	1600 x 1200	YES	YES	YES	YES
Cataloger	NO	NO	<24576	1600 x 1200	YES	YES	YES	YES
General	NO	NO	<3072	1280 x 960	YES	NO	NO	NO
Restricted	NO	NO	<96	None	NO	NO	NO	NO

	Approval Level	Read	Write	Delete	Map Between Records	Map Records to Media
Admin	6	Yes	Yes	Yes	Yes	Yes
Editor	5	Yes	Yes	Yes	Yes	Yes
Cataloger	4	Yes	Yes	Yes	Yes	Yes
General	0	No	No	No	No	No
Restricted	0	No	No	No	No	No

Default Inscribe Profile Privileges

When a user has multiple collections open in the Insight Java Client, the more restrictive permission for each privilege ALWAYS takes precedence.

Creating New Profiles Using the Insight Administrator Tools

Collection Profiles allow you to control the type of privileges a group of users may be granted within a collection.

To create a new profile:

- 1. Open Insight Administrator Tools and connect to the Collection Manager you want to create a new profile for.
- 2. Select Server Settings and then Profiles.
- 3. Right-click on the collection you would like to add the new profile to and click **New**.



🛅 Editing Profile	- - ×
Display Name:	
	Allow user to save a group
	Allow user to delete a group
	SPS Number
up to 24576 pixels 🔻	Maximum export resolution
1600 X 1200 🔻	Maximum export presentation resolution
	Allow editing of Virtual Collections
up to 24576 pixels 🔻	Maximum viewable resolution
	Allow exporting of source images
	Allow exporting of HTML files
	Allow editing of image links
	Allow editing of multi-views
	Allow editing of multi-page documents
Save	Cancel

- Display Name Provide a name for the profile.
- *Allow user to save a group* Select this box to enable a user to create and save a collection-level group (that everyone can access).

Note: This privilege should only be granted to collection owners and is not intended for General-Access profiles.

• *Allow user to delete a group -* Select this box to enable a user to delete a collection-level group.

Note: This privilege should only be granted to collection owners and is not intended for General-Access profiles.

- *SPS Number* The Storage Path Segment (SPS) refers to the machine on which the images accessed in Insight reside. This is a partial URL to the media files stored on the image server. Generally, set this number to 1. For more information on how this number is used, see the Administration Guide.
- *Maximum export resolution* Defines the maximum resolution that will be available for exporting by a user with the associated profile.
- *Maximum export presentation resolution* Defines the maximum presentation resolution that will be presented to a user with the associated profile.
- *Allow Editing of Virtual Collections* Grants the right to edit Virtual Collection content from within the Insight client.
- *Maximum viewable resolution* Limits the maximum resolution (within the available SPS range) for images when viewed using Insight.
- Allow exporting of source images If source images have been loaded, they will be accessible for download using the Insight Java Client.
- *Allow exporting of HTML files* Enables the option *Export as HTML* in the print menu of the Insight Java Client.
- *Allow editing of image links* Provides the right to edit image links (annotations, linked media, Web links).
- *Allow editing of multi-views* Provides the right to create, edit, and delete multi-view images.
- *Allow editing of multi-page documents* In version 3.5 or higher, provides the right to create, edit, and delete multi-page documents.

Once you have saved this profile, you will be able to select it in Insight Studio.

Inscribe Profile Privileges

After you create a new profile, you can enhance its privileges for Inscribe access.

- 1. Open Insight Administrator Tools.
- 2. Connect to the desired Collection Manager.
- 3. Select Server Settings and then Inscribe Profile Privileges.
- 4. Select the collection and double-click on the profile you would like to edit. Make any changes to the profile's approval level and permissions.

Console Root 🔶 🖌	ProfileID Profile Name	e Approval Level	Read	Edit	Add	Delete	Record Mapping	Media Mapping
🔮 User Managers 🛛 🗱 1	Demo-1-Admin	6		N	R	N	V	R
🖵 🚰 quick start UM 🛛 🚺 🙎	Demo-1-Editor	5			V		R	
Collection Managers	Demo-1-Catalo	oger 4			V			
- 🖓 quick start collection manager (lunaadn	Demo-1-Gener	ral O						
E- Catalog Templates	Demo-1-Restri	ct 0						
E- Collection Settings	New Demo Pro	ifile 0						
Server Settings Admin Accounts Composition Demo Demo Demo Demo Demo Connection Paols								

💼 Editing InScribe Privilege	: New Demo Profile 🔳 🖬 🔀
InScribe Approval Level: 0	
InScribe Permissions:	Read
	Edit
	Add
Ē	Delete
	Record to record mapping
E	Record to media mapping
Save	Cancel

- InScribe Approval Level The most restrictive privilege is 0 and the least restrictive is 6. A level 6 approval is usually given to a system administrator or high-level cataloger.
- *InScribe Permissions* This is where permissions may be enabled for performing the following tasks:
 - --Read, edit, add, or delete fields and records within Inscribe
 - --Perform record-to-record or record-to-media mapping

Insight Shares

Insight Shares act as network folders where users can store and access media groups, annotations, and web links.

Shares can be assigned to individuals or to multiple users. A user may have read-only, read/write, or read/write/delete privileges within shares.

If a user creates a group of images in a share, the user will be able to delete that item from the share regardless of the user's privilege to delete. The delete privilege allows a user to delete items from a share regardless of who created the item.

Adding a Share with the Manage User Access Tool

- 1. Select Manager User Access from the Insight Studio Task Menu.
- 2. Select **Shares** in the Access Type panel.
- 3. Click Add.
- 4. Enter a Share Name and click **OK**. Verify by clicking **Yes**.



- 5. Select the share and click **Properties**.
- 6. Select the **Share Access** tab.
 - a. Click Add.
 - b. Select the individuals who should have access.
 - c. Click OK.

General	Share Access			
Share A	ccess by User:			
	User Name	Write	Delete	Create Folders
- 🖅	jdoe (John Doe)		Ø	Ø
Add	Remove			
Add	Remove			

7. Select the appropriate Write/Delete/Create Folders privileges.



- 8. Click **OK**.
- 9. Click **Yes** in the confirmation window.

MULTI-COLLECTION ACCESS

Insight can easily grant access to remote collections. This section describes how to grant access to multiple collections.

As the following diagram illustrates, a user can be assigned to many User Groups. Each User Manager User Group Name and Access Key (Code Key) must have a matching Collection Manager User Group Name and Access Key (Code Key) for the collection being accessed.



Once you have added your Group Name and Access Key (Code Key) to the User Manager, either through Studio or the Administrator Tools, you will need to use the Insight Administrator Tools to grant access to users.

- 1. Open Insight Administrator Tools. Connect to the User Manager by rightclicking on the manager name and selecting **Connect**.
- 2. Select the **Users** folder on the User Manager.



3. Select and edit the user you wish to grant access to by double-clicking on the user.

🗎 Edit User -	pat 🖂 🖂
Username:	pat
Password:	luna
First name:	Pat
Last name:	Doe
Organization:	Luna Imaging Inc
E-mail:	pdoe@luna-img.com
Phone:	
Address:]
City:	
State:	
Postal code:	
Country:	
Available Au	thentication Groups Assigned Authentication Groups
PCDEFAULT Demo-Public	> Demo-1-Admin
	Save Cancel

- 4. Select any of the user groups in the Available Authentication Groups panel that you would like this user to be a member of and move them to the Assigned Authentication Groups panel.
- 5. Click Save.

Creating a Catalog Template

This chapter will describe how to build a catalog template using Insight Studio.

Common terms

Catalog Template

A catalog template is the metadata schema that represents the way that data is organized within a collection. A catalog template consists of a set of fields or groups of fields that represent one complete record.

Field

Fields are the lowest-level building blocks of a data structure. Each field represents one unique section of data. Fields can be categorized as Numeric, Short Text, Long Text, Date, or Required. Multiple fields can be combined to create Field Groups.

Field Group

Field Groups represent groups of fields organized for display and for data entry, as a way to organize common content.

Independent Records (An Authority record)

Independent Records should be used when data fields are related more to each other than the main (object) record. For example, a single creator record may be created to describe an individual artist (e.g. Pablo Picasso, 1881-1973), but it will be linked to multiple Work Records representing works by Picasso. The independent record enables catalogers to access and manage this information separately from the object record (accessible from the **File | Open Record** menu option in Inscribe).

Figure 2: Independent Record Diagram



In the example above, both Work Records (Work 1 and Work 2) link to the same creator information (Creator 1). If the Creator Record is updated, both records will share the updated data.

Dependent Records

Dependent Records duplicate data and are merged into the parent record (in many cases, this is the base record). A metadata architect might use dependent records for something like a Work Title where a unique title needs to be created for each object instead of linking each record to a unique title. Dependent Records can also be used to allow a field to repeat. Dependent records are not displayed in the form selection list in the **File | Open Record** of Inscribe.

Figure 2: Dependent Record Diagram



Controlled Vocabularies

Controlled vocabularies are a special type of independent record. Like independent records, they maintain unique values, but can only contain one field. Like dependent records within Inscribe they do not show up in the **File | Open Record** menu.

Catalog Template Tools



Add a new template: this will open the Catalog Template Properties page, where you can add a name, description, and reference URL for your collection.



Edit a template: this will open the Catalog Template Properties page, where you can adjust the template name, description, and reference URL.



Delete a template: you must delete all collections that use this template before deleting it.



Import a template: if you have exported a catalog template from Insight Studio, you may later import the associated XML file to the templates list.



Export a template: by selecting a template from the list and clicking this icon, you can export the template's properties to a location on your file server and later use this template in Insight Studio.



View template extended detail: this will open the Catalog Template Summary window, showing detailed information about the selected template.

You may view, edit, export, or delete any template in the list by right-clicking on it. You may add or import a template by right-clicking on the blank area of the Templates panel.

CREATING A FLAT CATALOG TEMPLATE

A flat catalog template is a metadata schema that does not have any relational data. An example of flat metadata is a single table in a database or a single spreadsheet of data. A flat catalog template may be needed if you would like to limit repeating fields.

M	Microsoft Excel - Flat_data.xls									
	Eile Edit View Insert Format Iools Data Window Help									
	Arial 🗾 1									
	🖻 🔒 🔒) 🖨 🖪 🖤	🖻 🛍	🖋 D + CH +	🍓 Σ f 🗶	t It 🛍 ·	₽.			
	18	- =								
	A	В	С	D	E	F				
1	ObjectID	Author	Date	Short Title	Publisher	Туре				
2	431	Andrews, A.H.	1875	Andrews Eight Ir	Chicago: A.H.	Globe				
3	444	Betts, John	1852	Betts's New Por	London: John I	Globe				
4	1131	Robert Sayer a	1776	Cover: American	London: Sayer	Covers				
5	1258	American Publi	1886	Rambles Throug	Hartford: Amer	Game				
6	1574	Blum, George V	1896	Cover: California	San Francisco	Covers				
7	4393	Watson, Gaylo	1874	Cover: Western	New York: Gar	Covers				
8	22472	Andreas, A. T.	1874	Park Place Hote	Chicago: A.T.	View				
9	22611	Andreas, A. T.	1874	(Portraits of) Ear	Chicago: A.T.	View				
10	24469	Chicago, Rock	1885	Text Page: Chic	Chicago: Cam	Text Page				
11	25828	(Rumsey, David	2002	Lake Tahoe map	(San Francisc	Separate Ma	ар			

1. After logging into Insight Studio, select the Collection Manager you'd like to use and double-click **Manage Catalog Templates**.

insi,	1
insi	
	ght° Studio V5.6
Create or select a collection to edit	
v5.60/02121September2006	Select collection to open and click 'select' luna imaging, inc. www.lunaimaging.com 02006. all rights reserved.

2. Review the summary and click **Next** to proceed.





3. Click the button in the Templates panel or right-click on the white space of the panel and select **Create Template** to create a new template. Enter a Template Name, and optionally, a Brief Description and Reference URL. Select **[Custom]** in the "Base template on" field to create a template from scratch. Select whether or not this template can be used for Personal Collections.

<< Catalog Tem	plates Template Properties Fields & Groups	>> Help
atalog Template Properti	es	Edit Template Properties
lit the properties of yo	ur template.	1. Enter a name for your Catalog Template.
Template Name:	New Template-1	2. If you would like to base this
Base template on:	[Custom]	new template on an existing
	Teasent	template, select the base Catalog Template.
Brief Description:		If you would like to create a
		new, custom template, leave Base Catalog Template on
		[Custom].
Reference URI		3. Enter a Brief Description
Reference URL:		(optional).
		 Enter the Reference URL where more information may
	Allow this template to be used for Personal Collections	be found about this template (optional).
		5. If this new Catalog
		Template is for Personal Collections, check the box
		next to Allow this template to be used for Personal
		Collections.
		6. Click Next to continue to the
		next step.
	Back Next Car	

- 4. Click Next to proceed.
- 5. Click the icon to add new fields. Enter a Field Name and choose an appropriate Field Type (see page <u>34</u>).

Do not create any Field Groups for a flat catalog template.

Insight Studio :: Visual Resour e Task Window Help	rce		
<	es Template Properties	Fields & Groups >>	Help
ield & Field Group Properties			Defining your template
odify the structure of your of emplate Structure	Field Settings		1. Select the Primary Field Group and specify properties. By default, the primary field group inherits the name of the template. Change the Field Group Name, if desired.
New Field <u>G</u> roup		scribe Mappings	Select the Field Groups Display option for display in Insight.
📼 New <u>F</u> ield	Field Name: Field Type:	Object ID	2. When creating or editing a
Simple Labels	- Description URL:	Custom (text) •	Field, use the Field Settings panel to adjust General properties, Insight properties, and inscribe properties. You can also set Mappings to other field's standards for cross-collection searching.
			Drag and drop fields and field groups to define the structure of the Catalog template or use the icons beneath Template Structure to create, delete, and move fields and field groups.
			Display order is dictated by an item's placement in the tree.
			3. Click 'Next' to proceed
Insight Studio :: Visual Resour	Back Next	Cancel	Press F1 for additional help.
e <u>T</u> ask <u>W</u> indow <u>H</u> elp	rce		
e <u>T</u> ask <u>Window H</u> elp << Catalog Template	rce		Help
e Task Window Help	rce		- C Help Defining your template
e <u>T</u> ask <u>W</u> indow <u>H</u> elp	rce	Fields & Groups	Help
Task Window Help Catatog Temptate Idd & Field Group Properties addify the structure of your of amplate Structure New Field Group New Field W W Simple Labels m Creator m Creator m Date m Tite	rce Template Properties catalog template. Field Settings General Tinsight Tins	Fields & Groups >>>	Help Defining your template 1. Select the Primary Field Group and specify properties. By default, the primary field group inherits the name of the template. Change the Field Groups Name, if desired. Select the Field Groups Display option for display in
Iask Window Help Iask Window Help Catalog remptation Structure of your o emplate Structure New Field Group New Field V Simple Labels Greator Creator m Date	rce catalog template Properties catalog template. Field Settings Field Name. Field Name. Field Type:	Fields & Groups scribe Mappings Object ID Custom (lext)	Help Defining your template 1. Select the Primary Field Group and specify properties. By default, the primary field group inherits the name of the template. Change the Field Group Name, if desired. Select the Field Groups Display option for display in insight. 2. When creating or editing a Field, use the Field Settings panel to adjuet General properties, insight properties, You can also set Mappings to other field's standards for
Task Window Help Catatog Temptate Idd & Field Group Properties addify the structure of your of amplate Structure New Field Group New Field W W Simple Labels m Creator m Creator m Date m Tite	rce catalog template Properties catalog template. Field Settings Field Name. Field Name. Field Type:	Fields & Groups scribe Mappings Object ID Custom (lext)	Help Defining your template 1. Select the Primary Field Group and specify properties. By default, the primary field group inherits the name of the template. Change the Field Group Name, if desired. Select the Field Groups Display option for display in Insight. 2. When creating or editing a Field, use the Field Settings panel to adjuet General properties, insight properties. You can also set Mappings to other field's standards for cross-collection searching. Drag and drop fields and field groups to define the structure of the Catalog template or use the icons beneath Template Structure to create, delete, and more fields and field
Task Window Help Catalog remptate Catalog remptate Catalog remptate Structure of your o mplate Structure New Field Group New Field Group Simple Labels m Creator m Date m Title	rce catalog template Properties catalog template. Field Settings Field Name. Field Name. Field Type:	Fields & Groups scribe Mappings Object ID Custom (lext)	Help Defining your template 1. Select the Primary Field Group and specify properties. By default, the primary field group inherits the name of the template. Change the Field Group Name, if desired. Select the Field Groups Display option for display in Insight. 2. When creating or editing a Field, use the Field Settings panel to adjust General properties, Insight properties, and inscribe properties, You can also set Mappings to other field's standards for cross-collection searching. Drag and drop fields and field groups to define the structure of the Catage template or use the icons beneath Template Structure to create, delete, and move fields and field groups. Display order is dictated by an

6. To perform cross-collection searches, you will be required to format your custom fields to the CDWA standard. Select a field from the Template Structure panel and click the **Mappings** tab in the Field Settings panel. Scroll through the list of available fields in the CDWA standard and choose the appropriate field to map to the field in your own template. Once you have completed your mappings, click **Next** to proceed.



7. Select four fields for **Labels** and **Sort Order**. The fields selected for Labels will appear in the Group Workspace in Insight. Media in Insight will be sorted based on the fields selected for Sort Order. Click **Next** to proceed.

<< Templ	ate Properties	Fields & Groups	Label & Sort Fields	Help [
Template Thumbna	il Label & Sort Ord	er Fields		Defining Label & Sort Fields
efine the default	thumbnail labels	s and sort order fields.		1. Select the four Thumbnail Labels you wish to appear beneath each media item.
Labels:				Thumbnail labels provide a brie textual reference to a media iten
Labers:	Creator Date		•	 Select the four Sort Order fields. To sort your collection's content by a single field, simply repeat the same field for each level of the sort order.
	Object ID Title		•	3. Click OK to define your Quick Search Fields locally and return to the Task Menu.
Sort Order:	Creator		•	4. In the collection edit mode, u File -> Save collection settings (Ctrl-S) to commit changes to th
	Date		•	server.
	Object ID		•	
	Title		•	
				Press F1 for additional help.

8. Select **Quick Search Fields**. The fields selected will be the searchable fields that are immediately available in Insight when search is selected. Click **Next** to proceed.

Insight Studio :: Flat Template File Window Help				
Fields & Groups	Label & Sort Fields	Quick Search		Help
Quick Search Fields Select the data fields to displa Searchable Fields: Creator Creator Description Identifier Subject Title	Insight Search List Preview Search b b b b b b b b b b b b b b b b b b b	W Y Creator Y Subject Y Title y keyword y data fields how all		Defining Quick Search Fields 1. Check the fields from Searchable Fields that you would like to appear immediately when search is selected. 2. The Search List Preview displays the fields which have been selected. Fields will appear in alphabetical order when shown in Insight. 3. Click Next to review your Cataloging Template settings, before publishing your custom template.
1	Back		Cancel	Press F1 for additional help.

9. Review all catalog template settings and click **Publish Template** to save your new catalog template to the Collection Manager server. Once a catalog template has been published, it will be available for use when creating a new collection.

Insight Studio :: Flat Template		_ 🗆 ×
<u>File Window H</u> elp		
Label & Sort Field	Is Quick Search Publish Template >>	Heip ×
Template Review & Confirmation	n	Reviewing Template Settings
Template'. To modify your cl the configuration panels.	your template settings. To create your template, select 'Publish noices, select 'Back' or use the scroll menu above to return to Flat Template emplate Summary - Monday, August 29, 2005	1. Prior to publishing your Cataloging Template, review your settings using the panel to the left. 2. Once you have confirmed your settings, click Publish Template to publish your new template to the server.
Property	Value	After your template has been
No collections use this temp	Flat Template Monday, April 4, 2005 6:23:15 PM an example of a flat catalog template no ollections Using <i>Flat Tomplato</i> olate mplate Elements: <i>Flat Tomplate</i>	successfully published to the server, you will be returned to the Cataloging Template selection panel.
	Back Publish Template Cancel	Press F1 for additional help.

CREATING A CATALOG TEMPLATE WITH RELATIONS

A catalog template with relations will be necessary when fields or a group of fields repeat or contain multiple values. If your metadata is relational or has an infinite number of repeating values, you will need to use a catalog template with relations. Below is an example of relational data.

						Pub List	
ObjectID	Author	Short_Title	Publisher	Pub_Date	Pub_Note	_No	Pub_Type
	Andrews, A.H.		Chicago: A.H.				
431	& Co.	Andrews Eight I	Andrews & Co.	1875	See note fiel	5517	Globe
			London: John				
444	Betts, John	Betts's New Po	Betts	1852	See note fiel	4362	Globe
	Robert Sayer						
	and John		London: Sayer				
1131	Bennett	Cover: America	and Bennett	1776	This small h	875	National Atlas
	American		Hartford: American				
	Publishing		Publishing				
1258	Company	Rambles Throug		1886	See note fiel	3886	Game
	Blum, George		San Francisco:				
1574	W.	Cover: California		1896	Early bicycle	1592	Guide Book
	Watson,		New York:				
4393	Gaylord	Cover: Western	Gaylord Watson	1874	See note fiel	2539	Case Map
			Chicago: A.H.				
22472	Andreas, A.T.	Park Place Hot		1874	Special ed. v	3034	State Atlas
			Chicago: A.H.				
22611	Andreas, A.T.	(Portraits of) Ea	Andrews & Co.	1874	Special ed. v	3034	State Atlas
	Chicago, Rock						
	Island and		Chicago:				
	Pacific Railway		Cameron, Amberg				
24469	Company	Text Page: Chic			Folds into se	5249	Timetable Map
			(San Francisco:				
			Cartography				
			Associates and				
25828	Rumsey, David	Lake Tahoe ma	Telemorphic, Inc.)	2002		5706	Separate Map

Note the shaded area in the data containing more than one value: author is Robert Sayer *and* author is John Bennett. A record with two authors would be represented with the following relations:

Ob	ojectID	Short_1	Fitle	Pub_Date	Pub_Note	Pub_List _No	Pub_Type
431	1	Andrews	s Eight I	1875	See note fiel	5517	Globe
444	4	Betts's	New Por	1852	See note fiel	4362	Globe
	31	Cover: A	Americar	1776	This small ha	875	National Atlas
125	58	Ramble	s Throug	1886	See note fiel	3886	Game
157	74	Cover: C	California	1896	Early bicycle	1592	Guide Book
439	93	Cover: V	Vestern	1874	See note fiel	2539	Case Map
224	472	Park Pla	ace Hote	1874	Special ed. v	3034	State Atlas
228	611	(Portrait	s of) Ea	1874	Special ed. v		State Atlas
244	469	Text Pa	ge: Chic	ago Rock Is	Folds into se	5249	Timetable Map
250	828		hoe ma			5706	Separate Map
250	020	Lake Ta	nue ma	2002			
250							
1200	Obje	ect ID	Autho		Authoril	D Author	
<u> 250</u>	Obje 4	ect ID 31	Autho 1		1	D Author Andrews	s, A.H. & Co.
<u> 250</u>	0bje 4 4	ect ID 31 44	Autho 1 2	or ID	1	D Author Andrews Betts, J	s, A.H. & Co. ohn
1	Obje	ect ID 31 44 131	Autho 1 2 3	or ID	1 2 	D Author Andrews Betts, J Robert S	s, A.H. & Co. ohn Sayer
	Obje	ect ID 31 44	Autho 1 2 3 4	or ID	1 2 	D Author Andrews Betts, J Robert S John Be	s, A.H. & Co. ohn Sayer nnett
	Obje 4 4	ect ID 31 44 131	Autho 1 2 3 4 5	or ID	1 2 	D Author Andrews Betts, J Robert S John Be	s, A.H. & Co. ohn Sayer
	Obje 4 4 1 1 1	ect ID 31 44 131	Autho 1 2 3 4	or ID	1 2 	D Author Andrews Betts, J Robert S John Be America	s, A.H. & Co. ohn Sayer nnett
	Obje 4 4 1 1 1 1 1 1 1 1 1	ect ID 31 44 131 131 258	Autho 1 2 3 4 5	or ID	1 2 	D Author Andrews Betts, J Robert S John Be America Blum, G	s, A.H. & Co. ohn Sayer mnett an Publishing
	Obje 4 4 1 1 1 1 1 2 1 5 4 3	ect ID 31 44 131 131 258 574	Autho 1 2 3 4 5 6		1 2 	D Author Andrews Betts, J Robert S John Be America Blum, G	s, A.H. & Co. ohn Sayer nnnett an Publishing Seorge W. , Gaylord
	Obje 4 4 11 12 15 43 22	ect ID 31 44 131 131 258 574 393	Autho 1 2 3 4 5 6 7		1 2 3 4 5 6 7	D Author Andrews Betts, J Robert S John Be America Blum, G Watson Andreas	s, A.H. & Co. ohn Sayer nnnett an Publishing Seorge W. , Gaylord
	0bj0 4 11 12 12 43 22 22	ect ID 31 44 131 131 258 574 393 472	Autho 1 2 3 4 5 6 7 8		1 2 3 4 5 6 7	D Author Andrews Betts, J Robert S John Be America Blum, G Watson Andreas Chicago	s, A.H. & Co. ohn Sayer nnett an Publishing Seorge W. , Gaylord s, A.T.

The next example represents the case of data containing repeating fields.

						Pub List	
ObjectID	Author	Short_Title	Publisher	Pub_Date	Pub_Note	_No	Pub_Type
	Andrews, A.H.		Chicago: A.H.				
431	& Co.	Andrews Eight I	Andrews & Co.	1875	See note fiel	5517	Globe
			London: John				
444	Betts, John	Betts's New Po	Betts	1852	See note fiel	4362	Globe
	Robert Sayer						
	and John		London: Sayer				
1131	Bennett	Cover: America	and Bennett	1776	This small h	875	National Atlas
	American		Hartford: American				
1050	Publishing		Publishing	4000		2000	
1258	Company	Rambles Throug		1886	See note fiel	3886	Game
4574	Blum, George		San Francisco:	4000		4500	
1574	W.	Cover: California	Geo. VV. Blum New York:	1896	Early bicycle	1592	Guide Book
4393	Watson,	Causer Meastern		1874	Con note fol	2539	Casa Man
4393	Gaylord	Cover: vvestern	Gaylord Watson Chicago: A.H.	1874	See note fiel	2539	Case Map
22472	Andreas, A.T.	Park Place Hote		1874	Special ed. v	3034	State Atlas
22472	Anureas, A.T.	Faik Flace Hut	Chicago: A.H.	1074	Special ed. V	JUJ4	State Allas
22611	Andreas, A.T.	(Portraits of) Ea		1874	Special ed. v	3034	State Atlas
22011	Chicago, Rock			10/4	Opecial ed. v	5054	Otate Allas
	Island and		Chicago:				
	Pacific Railway		Cameron, Amberg				
24469	Company	Text Page: Chic			Folds into se	5249	Timetable Map
		i i i i i i i i i i i i i i i i i i i	(San Francisco:				
			Cartography				
			Associates and				
25828	Rumsey, David	Lake Tahoe ma	Telemorphic, Inc.)	2002		5706	Separate Map

Note the shaded areas representing fields that share the same value. The repeating value that is shared by multiple records is represented by one record in a separate table (identified in Insight Studio as a Field Group). The Publisher table on the bottom right would be a Publisher Field Group in Insight Studio.

ObjectID	Short_Title	Pub_Date	Pub_Note	Pub_List No	t Pub_T	ype	
431	Andrews Eight I	1875	See note fiel	5517	Globe		
444	Betts's New Por	1852	See note fiel	4362	Globe		
1131	Cover: American	1776	This small ha	875	Nation	al Atlas	
1258	Rambles Throug	1886	See note fiel	3886	Game		
1574	Cover: California	1896	Early bicycle	1592	Guide	Book	
4393	Cover: Western	1874	See note fiel	2539	Case N	Иар	
22472	Park Place Hote	1874	Special ed. v	3034	State /	Atlas	
22611	(Portraits of) Ea		Special ed. v	3034	State /	Atlas	
24469	Text Page: Chic		Folds into se	5249	Timeta	ble Map	
25828	Lake Tahoe ma	2002		5706	Separa	ate Map	
Object ID Publis	sherID		Publisher		Country	State	City
431 1			Chicago: A.H. / & Co.	Andrews	United States	Minnesota	Minneapoli c
444 2			London: John I	Betts	oldies	winnesota	0
1131 3	3 //	_	London: Sayer		United		5 - SS
1258 4			Bennett		States		
1574 5			Hartford: Amer		United		
4393 8	i //		Publishing Co		States		
22472 1	<u> </u>	5	San Francisco Blum			California	
24469 7			New York: Gay Watson	lord		U.S. West	New York
25828 8			Chicago: Cam Amberg & Co.	eron,	United States		
			San Francisco Cartography As			California	
		201	San Francisco Telemorphic, li	2		California	5

The user is required to flatten the data into a delimited text format for Insight Studio to import. Below is an example of relational data represented in a flat form:

							Pub_		Pub_List	
ObjectID	Author	Author2	Author3	Short_Title	Publisher	Publisher2	Date	Pub_Note	_No	Pub_Type
	Andrews, A.H.				Chicago: A.H.					
431	& Co.			Andrews Eig	Andrews & Co.		1875	See note field	5517	Globe
					London: John					
444	Betts, John			Betts's New			1852	See note field	4362	Globe
					London: Sayer					
1131	Robert Sayer	John Bennett		Cover: Ameri			1776	This small ha	875	National Atlas
					Hartford:					
	American				American					
	Publishing				Publishing					
1258	Company			Rambles Thr	Company		1886	See note field	3886	Game
	Blum, George				San Francisco:					
1574	W.			Cover: Califo	Geo. W. Blum		1896	Early bicycle	1592	Guide Book
	Watson,				New York:					
4393	Gaylord			Cover: West	Gaylord Watson		1874	See note field	2539	Case Map
					Chicago: A.T.					
22472	Andreas, A.T.			Park Place H	Andreas.		1874	Special ed. w	3034	State Atlas
					Chicago: A.T.					
22611	Andreas, A.T.			(Portraits of)	Andreas		1874	Special ed. w	3034	State Atlas
	Chicago, Rock									
	Island and									
	Pacific				Chicago:					
	Railway				Cameron,					
24469	Company			Text Page: C	Amberg & Co.			Folds into sel	5249	Timetable Map
					San Francisco:	San Francisco:				
		Telemorphic,	Cartography		Cartography	Telemorphic,				
25828	Rumsey, David	Inc.	Associates	Lake Tahoe i	Associates	Inc.	2002		5706	Separate Map

Note that fields containing more than one value are broken into separate fields within a Field Group. For example, three fields now appear in the Author group: Author, Author2, and Author3. The final record in this data example contains three authors, which are now separated into distinct fields.

General Rules for Field Groups

To help maintain data integrity, as well as ease of use, Insight Studio imposes specific rules on fields and field groups:

- -- All fields and field groups must have unique names within a catalog template.
- -- Field groups must have at least one field defined within them.
- -- Dependent records cannot contain dependent records.
- -- Vocabularies can only contain one field.

Steps

1. After logging into Insight Studio, select the Collection Manager you'd like to use and double-click **Manage Catalog Templates**. Review the description and click **Next** to proceed.



2. Click the icon in the Templates panel or right-click on the white space of the panel and select **Create Template** to create a new template. Enter a Template Name, and optionally, a Brief Description and Reference URL. Select **[Custom]** in the "Base template on" field to create a template from scratch. Select whether or not this template can be used for Personal Collections. Click **Next** to proceed.

	Catalog Ten	nlatoe	Template Properties			Help
	mplate Properti		Template Properties	rieius er or odps		
						Edit Template Properties
it the p	roperties of yo	ur templ	ate.			 Enter a name for your Catalog Template.
Templa	te Name:	New T	'emplate-1			 If you would like to base this
	emplate on:	[Custo	om]	•		new template on an existing template, select the base Catalog Template.
Brief D	escription:					If you would like to create a new, custom template, leave Base Catalog Template on [Custom].
Referer	ice URL:				_	3. Enter a Brief Description (optional).
			ow this template to be used	for Personal Collections	-	 Enter the Reference URL where more information may be found about this template (optional).
						5. If this new Catalog Template is for Personal Collections, check the box next to Allow this template to be used for Personal Collections.
						6. Click Next to continue to the next step.
			Back Next		Cancel	

3. Click the button to add new fields. Enter a Field Name and choose an appropriate Field Type. Fields that exist at the root of the template will be the fields that belong to the primary record. In the next steps, you will create records that relate to the primary record.

Insight Studio :: Visual Resour File Task Window Help	ce			
	Template Properties	Fields & Groups		Help
Field & Field Group Properties				Defining your template
Modify the structure of your of Template Structure	atalog template.	ribe Mappings Object ID Custom (text) http://www.lunaimaging.com	•	1. Select the Primary Field Group and specify properties. By default, the primary field group inherits the name of the impiate. Change the Field Group Name, if desired. Select the Field Groups Display option for display in insight. 2. When creating or editing a Field, use the Field Settings panel to adjust General properties, Insight properties, and inscribe properties. You can also set Mappings to other field's standards for cross-collection searching. Drag and drop fields and field groups to define the structure of the Catalog template or use the icons beneath Template Structure to create, delete, and more fields and field groups. Display order is dictated by an item's placement in the tree. 3. Click Next to proceed
	Back Next	1	Cancel	
				Press F1 for additional help.

4. To create a new relational record, click the

New Field Group

button to create a new Field Group. Insight Studio will automatically create a new record type when a Field Group is created. Enter a Field Group Name, choose a Display Layout and select the appropriate Field Group Type (record type). Refer back to the *Common Terms* section for more details on Field Groups.

Field Group Types

Insight Studio :: Visual Resour le <u>T</u> ask <u>W</u> indow <u>H</u> elp	ce (Unpublished)			1	12
	Template Properties	Fields & Groups		Help	×
Field & Field Group Properties					- 100
No Field Group may have a codify the structure of your of complate Structure New Field Group New Eled New Eled Structure Part of Group 2 Part of Group 2	Field Group Settings General Field Group Name: Display Layout: Field Group Type	Field Croup 2 Display Field Names	•	Select the Primary Field Group and specify properties. By default, the primary field group inherits the name of the template. Change the Field Group Name, if desired. Select the Field Groups Display option for display in linsight. When creating or editing a Field, use the Field Settings panel to adjust General properties, insight properties, and in scribe properties. You can also set Mappings to other field's standards for cross-collection searching. Drag and drop fields and field groups to define the structure of the Catalog template or use the icons beneath Template Structure to create, delete, and move fields and field groups. Display order is dictated by an item's placement in the tree. 3. Click Next' to proceed	

Display Layout Options

Display Field Group Names: Displays the field group name in the descriptive data for Insight

Display Group & Field Names: Displays the field and field group name in the descriptive data for Insight

Display Field Names: Displays only the field name in the descriptive data for Insight

Single – Use Delimiter: Displays repeating field values with a delimiter value (such as a tab or comma)

General	
Field Group Name:	Field Group 2
Display Layout:	Display Field Names 🔹 💌
Field Group Type Dependent O Indep	Display Field Group Names Display Group & Field Names Display Field Names Single - Use Delimiter

5. Once you have created a Field Group, click the **New Field** button to add a new field and enter the field information. To move the new field, select the field and drag it to the location you desire.

Insight Studio :: Visual Resourc ile Task <u>W</u> indow <u>H</u> elp	e (Unpublished)		
	s Template Properties	Fields & Groups >>	Help
Field & Field Group Properties			Defining your template
Addify the structure of your of Femplate Structure New Field Group New Eield Simple Labels He lidentifer He Author Group Mathematical Structures Mathematical Struc	Field Settings	Cribe Mappings Author Short Text	Select the Primary Field Group and specify properties. By default, the primary field group inherits the name of the tempilate. Change the Field Group Name, if desired. Select the Field Groups Display option for display in insight. When creating or editing a Field, use the Field Settings panel to adjust General properties, insight properties, and inscribe properties. You can also set Mappings to other Field's standards for cross-collection searching. Drag and direld standards for cross-collection searching. Drag to define the structure of the Catalog tempilate or use the icons beneath Tempilate Structure to create, delete, and more fields and field groups. Display order is dictated by an item's placement in the tree. 3. Click Next' to proceed
	Back Next	Cance	Press F1 for additional bein
Field Types

Insight stores data in two formats: Text and Numeric.

There are five different pre-defined Field Types available to choose from within the General tab, they are:

- Date
- Long Text
- Short Text
- Numeric
- Required

Date, Long Text, Short Text and Required are text fields and can support up to ~4000 characters per value. The Numeric will only accept whole numbers.

Date

Fuzzy Dates – If a field has been defined as a Date field, there are certain requirements of the values that are entered. Dates may be entered with considerable flexibility of expression. You may enter specific dates, periods, or date ranges using a variety of forms.

Sample date entries are described below. If a date entry is not understood, a message will appear that specifies the invalid keyword or syntax. Then, you need to try again using the examples below as a guide:

Description Numeric Date Format	Examples 1782 5-Jan-14 7/4/1776
Familiar Date Vocabulary	11th century first millennium
Add Modifiers to Dates	2000 BC 450 740 BCE
Construct Date Ranges Using a Dash	1900 -1940 450 BC - 750

Insight does not currently support dates with terms for approximation or qualification: circa; ca.; around; early; mid; late. For example: early; around 1640; mid 11th century; ca. 1500 BC. Inscribe will also not support AD.

To create a date field type, select **Date** from the Field Type menu. A date field type will convert all supported date types to fuzzy dates, allowing users to be able search for date ranges.

Field Settings					
General Insight	Inscribe Mappings				
Field Name:	Publication Date				
Field Type:	Date				
Description URL:	Date Long Text Short Text Numeric Required				

Long Text and Short Text



Long Text will represent data in the data display of Insight by wrapping it back to the beginning of the line. See the **Note** field in the example to the left.

Short Text will represent data in the data display of Insight by wrapping it back to the center. See the Author or Type or Subject fields in the example to the left.

Numeric

A numeric field type will only accept whole numbers. When you search for values in number fields you will be presented with equals, does not equal, greater than and less than.



You also have the option of forcing the number to be within an integer range for data entry. This can be accomplished by choosing the **Inscribe** tab and selecting the following option:

Enforce integer range (Numeric fields only)					
Allow values between:	-2000	and	2006		

Select **Numeric** from the Field Type menu to create a numeric field type. A Numeric field type will require catalogers to catalog numeric values in the specified fields.

Modify the structure of your catalog template.					
Template Structure	Field Settings				
New Field <u>G</u> roup	General Insight	Inscribe Mappings			
📼 New <u>F</u> ield	Field Name:	Pub List No			
	Field Type:	Numeric			
	Description URL:	Date			
↓ Visual Resources		Long Text			
- 📼 Pub List No		Short Text			
– 📼 Publication Date		Required			
E- 🗢 Authors					
🗆 🖵 📼 Author					

Required

When you select Required, You are setting the field to be a text field that will require data to be entered when editing in Inscribe.

A required field has an asterisk (*) following the field name in Inscribe. You can also make any numeric or text field required by choosing the property in the inscribe tab.

ldentifier: *		
Creator:	*	ļ

6. Click the New Field button to add remaining fields.

The Insight client will prioritize display order by Field Group rather than by field order so ObjectID, Pub List No and Publication Date in the preceding example will appear before the fields in Authors, Publishers and Publication Type. The following steps will discuss how to control the field display order.

7. Because Insight prioritizes the Field Group display order rather than the field display order, you will need to create individual Field Groups for the fields that currently belong to the primary record (the Field Group at the top of the list that has the Template Name in it). Once you have created Field Groups for the fields, you can

use the

icons to adjust the Field Group order.

- 8. Once finished with all your adjustments, click Next.
- 9. Select four fields for **Labels** and **Sort Order**. The fields selected for Labels will appear in the Group Workspace in Insight. Media in Insight will be sorted based on the fields selected for Sort Order.
- 10. Select Quick Search Fields. The fields selected will be searchable fields that are immediately available in Insight when search is selected.
- 11. Review all catalog template settings and click **Publish Template** to save your new catalog template to the Collection Manager server. Once a catalog template has been published it will be available for use when creating a new collection.

MODIFYING AN EXISTING CATALOG TEMPLATE

You may choose to modify an existing catalog template to fit the needs of your collection if an existing template is similar enough to make creating an entirely new template unnecessary. For example, you might just want to change the field display names of an existing template or add an additional field.

Steps

1. After logging into Insight Studio, select the Collection Manager you'd like to use and double-click **Manage Catalog Templates**. Review the summary and click on **Next** to proceed.



2. Click the button in the Templates panel or right-click on the template you would like to edit.

You will be restricted in some of the edits you can make to catalog templates.

You can not do the following:

- Move existing Fields between Field Groups
- Move existing Field Groups within other Field Groups

You can do the following:

- Rename Fields and Field Groups
- Create new Fields and Field Groups
- Delete existing Fields and Field Groups (permanently destroys data)
- Reorder Fields within a Field Group
- Reorder Field Groups within a Field Group
- 3. Click Next to edit the Thumbnail Labels and Sort Order.
- 4. Click Next to select your quick Search Fields.

Creating a New Collection

This chapter will describe how to set up basic collection properties in Insight Studio. There are two types of collections you can create using Insight Studio: Institutional Collections and Virtual Collections.

Institutional Collection

An Institutional Collection is a self-contained repository of content based on a single catalog template. This type of collection must be created before creating a related Virtual Collection.

Virtual Collection

A Virtual Collection is a subset of an existing Institutional Collection that will share the parent collection's catalog template.

CREATING AN INSTITUTIONAL COLLECTION

1. After logging into Insight Studio, select the Collection Manager you'd like to use and double-click **Create New Collection**.



- 2. Read the Insight Studio summary and click Next.
- 3. Read the Collection Properties summary and click Next.
- 4. Enter a Collection Name. Select Institutional as your Collection Type.
- 5. Optionally, provide a Brief Description, Collection Website and Copyright Statement for your collection. Click **Next** to proceed.

Insight Studio :: Quick Start le <u>T</u> ask T <u>e</u> mplate <u>W</u> ind			
<< Overview	Collection Properties Collection Theme >>	Help ×	
Collection Properties		Defining Collection Properties	
Define the properties fo	r your collection	Optionally, you may define a brief description, a collection website, and a copyright statement. The collection description and	
Collection Name:	Quick Start	website hyperlink appear when selecting a collection. The	
Collection Type:	Institutional Collection	copyright statement is included when content is exported from	
Parent Collection:		Insight.	
Brief Description:			
· ·		User Interface Tip	
		The status bar, located immediately below the title bar, will indicate the item requesting your attention.	
Collection Website:		An alert message will appear	
Copyright Statement:		when a required value has yet to be defined or the value is invalid. For example, if a collection name has not been defined, the "Please enter a collection name" message will appear. The status bar is also used to indicate processing activity.	
	Back Next Cancel	Press F1 for additional help.	

6. Select an existing theme for your Insight collection from the Themes panel. A preview of this background image will appear to the right. Click **Next** to select that theme and proceed.

iew Collection Propertie	es Collection Theme	Help
		Selecting a Theme
r collection, or click [Custom]	to create a custom theme	On the left is a list of existing Themes that may be used as your background image.
Theme Preview		 Select an existing theme, or use [Custom] to create a new theme using an image of your
insight"		choice.
		 Click OK once your selection has been made to commit changes locally and return to the Task Menu. In collection edit mode, use File → Save collection settings (Ctrl-S) to commit changes to the server.
		To create a custom theme: 1. Select [Custom] from the
		list of Themes.
Selected Theme Prope Property Theme Name Description Image Size	rties: Values Solar Sunburst w:803 h:590	 Click Browse to locate the image you wish to use. A preview of the theme will be generated once the file has been selected and you click 'Open'.
		3. Define your custom Theme Name and optionally, add a Description for that theme.
	Theme Preview	Theme Preview Selected Theme Properties: Property Values Theme Name Solar Description Sunburst Image Size wr.803 h.590

7. If you would like to create your own theme, select **[Custom]** from the Themes panel and click Browse to locate an image file to use. Enter a Theme Name and optionally, a Description. Click **Save** to save your new theme

Images with mid-tones work best for custom background themes. Avoid using images that are very light.



- 8. Review the Catalog Templates summary.
- 9. Select a catalog template from the Templates panel that best fits your existing data or the data that you will create later. A description of the template will appear to the



right. For more details about the template, click the Templates panel. Click **Next** to proceed.

button in the

Available templates in Insight Studio include Dublin Core, Simple Labels and VRA. Any custom templates that you create and save will also be listed here. You can edit a template, create a custom template, or import a template while creating your new collection. For more information about editing, creating custom, or importing catalog templates, see the Catalog Templates section of this guide.

Insight Studio :: Visual Resource :: Dublin Core			
< Collection Proper	ties Collection Theme		Help X
Catalog Templates			Select or manage templates
Select a template from the I Templates:	ist below. Description: Dublin Core Created: Additional Information: Dependent collections:	7/20/05 12:00 PM http://www.dublincore.org No collections use this template	Seter of indiative templates There are three options in the Catalog Templates section. Select an existing templates from the list of templates. Select an existing template for template using the Edit button. Set template button below the templates button below the templates button below the Templates bist pane allow you to manage your templates. Hold the mouse cursor over a button to view the action it will perform: Set (Existing the View template are or wind the template information to the file system as a web page.
	Back Next	Cancel	2. The Create a new template button creates a new template and advances you to the Catalog Template Properties panel.

10. Review your new collection's properties. Click **Publish Collection** to save your changes. Your collection will now be listed as an available collection in the Collection Manager when you log into Insight, Insight Studio, and Inscribe.

Insight Studio :: Quick Start :: Fl	at Template				
<u>File T</u> ask Template <u>W</u> indow	Help				
Cuick Search		Publish Collection		Help	×
Collection Review & Confirmatio	n			Reviewing Collection Settings	-
	e choices you have made. To cr ses, press Back or use the scroll			Prior to publishing your collection, review your settings using the panel to the left. Once you have confirmed you settings, click Publish Collection to publish your new collection the server.	ur on
	Collection Properties			After your collection has been	
Property	Value			successfully published to the server, the Insight Studio Task	
Name	Quick Start			Main Menu will appear.	
Collection Type	Institutional Collection				
Theme	Telegraph				
Template	Flat Template				
Field Name Title Creator Subject Creation Date	lected Thumbnail Label Fie				
	Selected Sort Order Field	5		Press F1 for additional help.	
۵	Back Publish collection	on	Cancel		

11. Click **Next** to view the Insight Studio Task Menu.

	studio :: Quic T <u>e</u> mplate		mple Labels	
_	Publishing	window	<u>u</u> sih	 Help ×
				Collection Publishing
Yo	ur collection	has been	successfully published. Click 'Next' to continue.	Conector Paulsing Once your Collection has been published, click Next to open the Insight Studio Task Menu.



Once your collection has been published, you can modify the collection's descriptive properties, its theme, and its thumb/sort settings via Insight Studio's Task Menu. You can also add data and media to your collection via this menu, as well as manage user and collection access and enabled standards.

Save changes to your collection by clicking **File**, then **Save collection settings** (or use the shortcut keys **CTRL+S**).

Delete your collection by clicking **File**, then **Delete Collection**. Any Virtual Collections that use the Institutional Collection as a parent will also be deleted. This privilege is not granted by default. You will need to assign this privilege from the Insight Administrator Tools (Admin Accounts). See Managing Users and Accessing Collections section of this guide to grant this privilege.



ADDING YOUR COLLECTION TO LUNA

To add your collection to be available to the LUNA, See the LUNA **"Adding Insight Content to LUNA"** in the "Guide to LUNA" Documentation

CREATING A VIRTUAL COLLECTION

To create a Virtual Collection, you must first have published an Institutional Collection to base the virtual version on. Your Virtual Collection will appear as a read-only collection level group in the Insight Java Client.

- 1. After logging into Insight Studio, select the Collection Manager you'd like to use and double-click **Create New Collection**.
- 2. Read the Insight Studio summary and click **Next**.
- 3. Read the Collection Properties summary and click Next.
- 4. Enter a Collection Name. Select **Virtual** as your Collection Type.
- 5. Select the published Institutional Collection from the **Parent Collection** pull-down menu.

	udio :: Virtual Quick ! Template Window				
	Overview	- Collection Properties			Help
ollection F	Properties				Defining Collection Properties
Define th	he properties for y	your collection			Optionally, you may define a brie description, a collection website, and a copyright statement.
Collectior	n Name:	Virtual Quick Start	_		The collection description and website hyperlink appear when
Collection	n Type:	Virtual Collection		•	selecting a collection. The copyright statement is included when content is exported from
Parent Ci	ollection:	Quick Start		-	Insight.
Brief Des	cription:				
					User Interface Tip
					The status bar, located immediately below the title bar, will indicate the item requesting your attention.
Collectior	n Website:				An alert message will appear
Copyright	t Statement:				when a required value has yet to be defined or the value is invalid For example, if a collection name has not been defined, the "Please enter a collection name" message will appear. The status bar is also used to indicate processing activity.
		Back Next		Cancel	Press F1 for additional help.

- 6. Optionally, provide a Brief Description, Collection Website and Copyright Statement for your collection. Click **Next** to proceed.
- 7. Select a theme for your collection (See steps 6 and 7 in **Creating an Institutional Collection**).
- 8. Review your new collection's properties. Click **Publish collection** to save your changes. Your collection will now be listed as an available collection in the Collection Manager when you log into Insight, Insight Studio, and Inscribe.

📕 Insight Studio :: Virtual Quick Sta	rt	
<u>File T</u> ask T <u>e</u> mplate <u>W</u> indow	Help	
< Quick Search	Publish Template Publish Collection >>	Help ×
Collection Review & Confirmation		Reviewing Collection Settings
	choices you have made. To create your collection, press Publish is, press Back or use the scroll menu above to return to the	1. Prior to publishing your collection, review your settings using the panel to the left. 2. Once you have confirmed your settings, click Publish Collection to publish your new collection to the server.
Property	Collection Properties Value	After your collection has been successfully published to the server, the Insight Studio Task
Name	Virtual Quick Start	Main Menu will appear.
Collection Type	Virtual Collection	
Parent Institutional Collection	Quick Start	
Theme	Telegraph	
		Press F1 for additional help.
Ł	Back Publish collection Cancel	riess ri ioi auditoriai neip.

9. Click **Next** to view the Insight Studio Task Menu.

🎒 Insight Studio :: Virtual Quick Start	
File Task Template Window Help	
Collection Publishing	Help ×
	Collection Publishing
Your collection has been successfully published. Click 'Next' to continue.	Once your collection has been published, click Next to open the insight Studio Task Menu.
Nex	Press F1 for additional help.

You will not be able to import data, import media, modify thumb/sort settings, or manage enabled standards with a virtual collection. These properties and the content of your virtual collection are borrowed from the parent institutional collection.



MANAGE VIRTUAL COLLECTION CONTENT

Once the Virtual Collection has been created, you will need to assign content to it, this content can only come from its Parent Collection. To do this you will first need to Grant User Privileges to the individual who will manage the content of the Virtual Collection.

- 1) Add **Allow editing of Virtual Collections** to the appropriate profile in the Insight Administrator Tools
 - a. Open the Insight Administrator Tools and connect to the Collection Manager that contains the Institutional and Virtual Collection you would like to manage.



b. Locate the Profiles.

		-	
11	Globes Administrator		1 up to 24576 pixels

c. Highlight the Institutional Collection and select from the profiles in the right panel. Double click or right click to edit the profile.

🛅 Editing Profile	
Display Name:	Globes Administrator
Z	Allow user to save a group
	Allow user to delete a group
1	SPS Number
up to 24576 pixels 💌	Maximum export resolution
1600 X 1200 🔻	Maximum export presentation resolution
	Allow editing of Virtual Collections
up to 24576 pixels 🔻	Maximum viewable resolution
	Allow exporting of source images
Ľ	Allow exporting of HTML files
	Allow editing of image links
	Allow editing of multi-views
	Allow editing of multi-page documents
Save	Cancel

- d. Check Allow editing of Virtual Collections and Allow user to save a group options.
- 2) You are now ready to add the content to the new Virtual Collection using the Insight Java Client. Launch the Insight Java Client and select the Institutional Collection you are basing the Virtual Collection on.



3) Once the collection is open select **manage virtual collection contents** under the file menu.

	Contraction of the second s
file	open collection
edit	open group
group	new group
data	save group
search	save group as
print	save results as
return	delete group
help	manage virtual collection contents
exit	export selected
	export presentation to HTML
	export presentation to PowerPoint

4) Select the appropriate Virtual Collection group to edit.



5) Once the Group opens, populate the Group with content from the Institutional Collection then save the group.

Your Virtual Collection is now ready to access.

Adding Content to a Collection

This chapter describes how to add data and media to your collection. There are two scenarios described here: one for collections that already contain catalog data and one for collections that do not.

After creating and publishing a new collection with Insight Studio, the Insight Studio Task Menu will appear.



You may also access this menu after closing Insight Studio by double-clicking the collection you would like to work with from the appropriate Collection Manager during log-in.



In addition to modifying collection specifications that were selected during the collection creation process and managing user and collection access, you may also import data and media via the Insight Studio Task Menu.

WORKFLOW #1: ADDING CONTENT WITH IMPORTED DATA

This section describes the steps involved in adding content to your collection if your media has already been cataloged and a data file exists for your content. To do this, import data first.

Importing Data

By importing catalog data before media, you can quickly and easily link data records to associated media files using Insight Studio.



- 1. After publishing a new collection, click the **Import Data** button in the Task Menu to start importing catalog data for your collection.
- In the Import Descriptive Data page, type the location of the existing data file on your file server in the File Name field or browse for the file by clicking the folder button.
- 3. You must select the **Character set** and **Delimiter** properties appropriate for your data file.

le <u>T</u> ask <u>W</u> indow <u>H</u> elp	
mport Descriptive Data	Help
+ Choose a source file to import.	Importing Descriptive Data
elect a text file to import File Name: 🛛 🔁 CSV (Delimited Text File)	There are two types of descriptive data formats that can be imported into Insight via Insight Studio: CSV (Delimited Text File) and XML
	1. Select the data source file you wish to import by clicking the Folder icon and selecting your data file. 2. Select the appropriate File Format.
CSV File Properties Character set: System Default Unicode (UTF-8) Delimiter: Comma Semicolon Tab Space Other:	Optionally, select the appropriate File Format and then click the Generate Descriptive Data Import Template button to export a CSV or XML file that may be used as an import model.
	 Specify the File Encoding type (Character set) of the source file.
Note:	4. Specify the column Delimiter used in the source file.
Refer to the Administrative guide for further information regarding data containing carr / line feeds.	age returns Handling Paragraphs or New-Line Characters in your Data
Next	Return If your import file is CSV.

Data that uses new-line characters, in the form of paragraphs or carriagereturns such as the delimiter, will cause issues in data import, preventing Insight from importing complete data records. If the data being imported into Insight has new-line characters, it must be pre-processed to ensure the new-lines or paragraphs are properly imported. See the Administration Guide for instructions on how to format data that uses such carriage returns as the delimiter.

You can review your collection's catalog template structure before importing new



data by clicking the button. You can also use this exported file as a model for the data to be imported into your collection. This ensures that your data import file correctly fits the structure of the catalog template you selected when creating your collection and as well as the properties selected for the data file you will import.

The correct order of fields used in your collection's catalog template will be generated. These fields will be separated in the exported file by whatever delimiter you select in this step. For our relational data example, the generated file, opened with Excel, will look like:

	🔀 Microsoft Excel - generate										
	🖲 File Edit View Insert Format Iools Data Window Help										
	Arial ▼ 10 ▼ B <i>I</i> U ≡ ≡ ≡ ⊞										
) 😅 🖬 🔒) 🖨 🖪	🕫 🐇 🌾	i 🛍 💅	K) v Cil v	🍓 Σ 🍂		🛍 🛷 100	1% 🔹 👰	-	
	A1	•	 ObjectIE)							
	Α	В	С	D	E	F	G	Н		J	K
1	ObjectID	Author	Short_Title	City	State	Country	Publisher	Pub_Date	Pub_Type	Pub_List_	Pub_Note
2											
3											
4											
-											

- 4. Click Next.
- 5. Review the automatic mappings generated between your data file and the catalog template you selected when creating your new collection. The field headers from

your data file (listed in the column Source Column Name) should match the field headers from the catalog template you selected for your collection (listed in the column Target Insight Field).

-	Window Help		
nt D	escriptive Data		Help
			Importing Descriptive Data
	arget' field to define field mappings. to Target Field Mappings		 Select the data source file y wish to import by clicking the Folder icon.
	Source Column Name	Target Insight Field	Optionally, click the Generate
√	ObjectID	ObjectID	Descriptive Data Import
√	Author	Author	Tempate button to export a
√	Author2	Author	delimited text file which may t
√	Author3	Author	used as an import model.
√	Short_Title	Short_Title	2. Specify the File Encoding to
4	Publisher	Publisher	of the source file.
4	Publisher2	Publisher	of the bounce me.
√	Pub_Date	Pub_Date	3. Specify the column Delimit
√	Pub_Note	Pub Note	used in the source file.
√	Pub List No	Pub List No	
✓	Pub_Type	Pub_Type	 Click Next to proceed to de the field mapping relations.
			 Click on the pull-down to the right of the source field; select the destination mapping field < SKIP > to ignore the selecter source column.
			 Once all fields are mapped click Next to verify your import configuration.
			7. Click Finish once you have reviewed your data field map
			Press F1 for additional help.

6. If a column header (or field title) in your data does not match a field in the catalog template you selected for your collection, you will see **<MISSING MAPPING>** in the **Target Insight Field** column for that field title.

For example, if you selected the Simple Label template when creating your collection but your data file uses the term "Name" instead of the catalog template's term "Title," this inconsistency would appear as:

Insight	Studio :: Quick Start		
<u>T</u> ask	: <u>W</u> indow <u>H</u> elp		
nport De	escriptive Data		Help
Spe	ecify field mappings. All Source columns n	nust have a target field mapping.	Importing Descriptive Data
	n <mark>rget' field to define field mappings.</mark> to Target Field Mappings	 Select the data source file you wish to import by clicking the Folder icon. 	
	Source Column Name	Target Insight Field	Optionally, click the Generate
✓	Identifier	Identifier	Descriptive Data Import Tempa
1	Creator	Creator	button to export a delimited text
✓	Date	Date	file which may be used as an
x	Name	< MISSING MAPPING >	import model.
~	Description	Description	 Specify the File Encoding type of the source file
			used in the source file. 4. Click Next to proceed to defin the field mapping relations. 5. Click on the pull-down to the right of the source field (is select th destination mapping field or < SKIP > to ignore the selected source column. 6. Once all fields are mapped, click Next to verify your import configuration.
	Back	Next	Comparation. 7. Click Finish once you have reviewed your data field mappin Press F1 for additional help.

7. Click **<MISSING MAPPING>** where it appears in the Target Insight Field column to select the correct field name from the pull-down menu. The menu contains a list of fields in the catalog template used for your collection. Select the field most appropriate for the corresponding field of data in your imported file.

	escriptive Data		Help
Spe	ecify field mappings. All Source columns r	nust have a target field mapping.	Importing Descriptive Data
	rrget' field to define field mappings. to Target Field Mappings		 Select the data source file yo wish to import by clicking the Folder icon.
	Source Column Name	Target Insight Field	
✓	Identifier	Identifier	Optionally, click the Generate Descriptive Data Import Temp
1	Creator	Creator	button to export a delimited tex
1	Date	Date	file which may be used as an
x	Name	Identifier	import model.
✓	Description	< SKIP >	2. On a life the File Free diverses
		Creator	 Specify the File Encoding type of the source file.
		Date	of the addres life.
		Description	3. Specify the column Delimiter
		Identifier	used in the source file.
		Title	4. Click Next to proceed to defin the field mapping relations.
			 Click on the pull-down to the right of the source field; select destination mapping field or < SkIP > to ignore the selected source column.
			 Once all fields are mapped, click Next to verify your import configuration.
			 Click Finish once you have reviewed your data field mapping

All fields in your catalog template will appear in the pull-down menu of fields as options for your missing mapping value but fields in the collection's primary record type may only be chosen once for mapping.

You may also select <SKIP> to disregard a field that is missing its mapping value. Doing this will ignore the field of data and it will not appear in your collection.

- 8. Click Next.
- 9. Review settings and click Finish.





After you have finished importing your data, click the Menu to start importing media for your collection.

button in the Task

1. Click **New** to create a new batch. A batch represents a group of media items imported at the same time. The batch in the left panel will show the date and time it was created. If you do not create a new batch, a batch will be automatically generated whenever you add content to the Process List in one of the two options listed below.

Imported images can be deleted by entire batch, as well as individually, so importing your media in several batches is a good way to assure easier changes to your collection in the future.

2. Media files can be imported to your collection in one of two ways:

a. You can drag files from where they are stored on your file system and drop them onto the Process List panel to the right of the Batch panel.

--or--

b. You can find the media files you want by clicking **Browse** and importing them from your file system to the Process List.

🖵 Insight Studio :: Quick Start		_ 🗆 ×
<u>File Task Window H</u> elp		
Import Media		Help ×
	nto the panel below, or click browse, then click import.	Importing Media
Use the tabs below to Process, Link, R	eview and Publish your media.	1. Click New to create a batch.
Batch Aug 30, 2005 12:442 Look in: A	LL T 1131 jpg	e batch, drag ia / directories iss List, or click en a file system
Recent	1258.jpg 1574.jpg 22472.jpg	to process and
Desktop	431.jpg	ete, click the map the la to existing
Sidhartha	4393 jpg 444 jpg	ds-to-media, rnal Mapping Mapping File ne the Mapping appings may d in Inscribe
My Network File	name: ALL	Open g media. Click
File	s of type: Supported Image, Audio, Video File Types	Cancel view tab to
		review imported media before publishing to your collection group.
New Delete Browse	Delete Cancel Import Return	6. Click the Publish tab to publish the media to your collection. Click 'Select All Unpublished Media' to select

The Process List will show you the files you have selected for import.

Import Media				Help ×
lse the tabs below to Batch Aug 30, 2005 12:44:28 PM	Importing Media 1. Click New to create a batch. 2. To define the batch, drag and drop media / directories onto the Process List, or click Browse to open a file system			
	1131.jpg 1258.jpg 1574.jpg 22472.jpg 22611.jpg 24469.jpg 25828.jpg 431.jpg 439.jpg 439.jpg 444.jpg	C:Documents and SettingstmacMy C:Documents and SettingstmacMy	Pending Pending Pending Pending Pending Pending Pending Pending Pending	explorer. 3. Click Import to process and upload media. 3. Once complete, click the Linking tab to map the imported media to existing data records. 4. To link records-to-media, click Use External Mapping File, define the Mapping File Path, then define the Mapping Field Name. Mappings may also be defined in Inscribe after publishing media. Click Apply Links' to link records to media. 5. Click the Review tab to review imported media before
New Delete	Browse	Delete Canc	ei Import	group. 6. Click the Publish tab to publish the media to your collection. Click 'Select All Unpublished Media' to select

You can delete media items in the Process List by selecting the row in the right panel and clicking **Delete** below the Process List panel. You can also delete the entire batch by selecting the batch in the left panel and clicking **Delete** below the Batch panel.

- 3. Once the Process List contains the files you wish to import, click **Import**. A status message will appear to indicate Pending, Processing, Uploading, or Complete for each file. When the entire batch has been processed completely **Finished Importing Media** will appear at the top.
- 4. After importing media, click the **Linking** tab if you would like to link these media files to records in an imported data file.
- 5. To link media to data records create a tab-delimited text file in which the first column shows your media file names and the second column shows a linking value from your cataloging data. The two values are separated by a tab character. In the example below, the linking value in the second column is the ObjectID field from the collection's catalog data.

Note: The field you choose as the linking value must be a field in the primary Field Group/Record Type. For example in Insight's version of Dublin Core it would be "Identifier".

🌌 linking_data.tx	t - Notep 💶 🛙	JN
File Edit Format	Help	
431.jpg 444.jpg 1131.jpg 1258.jpg 1574.jpg 4393.jpg 22472.jpg 22611.jpg 24469.jpg 25828.jpg	431 444 1131 1258 1574 4393 22472 22611 24469 25828	T T

The value taken from your catalog data for the mapping text file must match exactly.

- 6. Click **Use External Mapping file** and select the mapping file you created in the **Mapping File Path** field.
- 7. Define the **Mapping Field Name** from the pull-down menu. The menu contains all fields in the catalog template you selected when creating your collection. This should be the value in the second column of your mapping text file. If the mapping is correct, a preview will appear below.

💵 Insight Studio - Quick S	tart			
<u>File Task Window H</u> e	lp			
Import Media			Help	×
			Importing Media	
Use the tabs below to P	rocess, Link, Review an	nd Publish your media.	1. Click New to create a batch.	
Batch Sep 9, 2005 2:31:36 PM	Monning File	g Review Publish	 To define the batch, drag and drop media/directories onto the Process List, or click Browse to open a file system explorer. Click Import to process and upload media. 	
	Define field containing n Mapping Field	Wait until "Finished importing media" appears at the top, then click the Linking tab to map the imported media to existing data records.		
	Preview		4. To link records to media.	
	Media Filename	ObjectID	create a tab-delimited text file	
	431.jpg	431	in which the first column shows your media file names	222
	444.jpg	444	and the second column	
	1131.jpg	1131	shows a linking value from	
	1258.jpg	1258	your cataloging data. Click Use External Mapping file	
	1574.jpg	1574	and select the mapping file	
	4393.jpg	4393	you created in the Mapping	
	22472.jpg	22472	File Path. Define the Mapping	
	22611.jpg	22611	Field Name. This should be	
			the value in the second column of your mapping text	
New Delete		Apply Links	file. Mappings may also be defined in Inscribe after publishing media. Click 'Apply	
		Return	Links' to link records to media.	

There are two reasons why a preview might not appear:

a. There is an inconsistency between the file names listed in the first column and the actual file names you have imported. This includes file names, file

extension types, and any inconsistencies between the use of lower and uppercase letters.

- b. There is a formatting issue with your mapping file (either columns are mixed up, the values are not separated by a tab character, or the file was not saved as a tab-delimited text file).
- 8. Click Apply Links.
- 9. Click the **Review** tab to review thumbnails of your imported images and the links to imported data.

🂵 Insight Studio :: Quick S	tart							
File Task Window Help								
Import Media					Help ×			
🛨 Drag and drop med	ia or directories c	into the panel below, or	r click browse, ti	hen click import.	Importing Media			
Use the tabs below to P	rocess, Link, R	eview and Publish y	our media.		1. Click New to create a batch.			
Batch	Process List	Linking Review	Publish		2 To define the betch drag			
Aug 30, 2005 3:21:41 PM	Image	Filename	Link	Date Processed	2. To define the batch, drag and drop media / directories			
		1131.jpg	London: Say	Tue 30 Aug 2005 15:	onto the Process List , or click Browse to open a file system explorer. 3. Click Import to process and upload media.			
		1258.jpg	Hartford: Am	Tue 30 Aug 2005 15:	3. Once complete, click the Linking tab to map the imported media to existing data records.			
		1574.jpg	Cover: Califo	Tue 30 Aug 2005 15:	4. To link records-to-media, click Use External Mapping File, define the Mapping Filed Name. Mappings may also be defined in Inscribe after publishing media. Click Apply Links [*] to link records to media.			
		22472.jpg	Park Place H	Tue 30 Aug 2005 15:	5. Click the Review tab to review imported media before publishing to your collection group.			
New Delete		D	elete	Return	6. Click the Publish tab to publish the media to your collection. Click 'Select All Unpublished Media' to select			

10. Check for any missing links before proceeding.

Other inconsistencies that may later affect successful linking include an incorrect mapping field name selected in the **Define field containing mapping values** section or an inconsistency between the linking value in your mapping file and the corresponding data in your imported data file.

- 11. If your links are correct, click the **Publish** tab.
- 12. Move all unpublished media from the current batch into the Published Media table for processing by clicking **Select All Unpublished Media** and then clicking the

button. Move media objects back to the Unpublished Media table by selecting

them and clicking the button.

13. Click **Apply Changes** to publish media with mapped data to your Insight collection.

💵 Insight Studio :: Visual Res	ource Collection				×
<u>File Task Window H</u> elp					
Import Media				Help	<
🕂 Finished importing me	dia				
Use the tabs below to Proc	cess, Link, Reviev	v and Publish your media.		Importing Media	
Batch	Process List	- Linking Review Publish	_	1. Click New to create a batch.	
Jan 23, 2006 5:15:04 PM	1	3	1	2. To define the batch, drag	
oan 25, 2000 5.15.04 P.M		ublished or Unpublished N	ledia, then press 'Apply	and drop media/directories	
	Changes'	N= (0 H)		onto the Process List , or click Browse to open a file system	
	Unpublished Me	dia (U riems)		explorer.	
	Image	Filename	Link		
				 Click Import to process and upload media. 	
				apro an incara.	
				Wait until "Finished importing	
				media" appears at the top, then click the Linking tab to	
				map the imported media to	
				existing data records.	
	Select All Unpub	ilished Media 🚹 ↓	Apply Changes	4. To link records to media.	
				create a tab-delimited text file	
	Published Media	(11 items)		in which the first column	
	Image	Filename	Date Published	shows your media file names and the second column	
	intage			shows a linking value from	
	The second	0004008.tif	Not Published	your cataloging data. Click	
				Use External Mapping file and select the mapping file	
	ENTRY AND IN			you created in the Mapping	
		1131.jpg	Not Published	File Path. Define the Mapping	
	ALL			Field Name. This should be the value in the second	
				column of your mapping text	
New Delete	the state	1258.jpg	Not Published 🥃	file. Mappings may also be defined in Inscribe after	
				publishing media. Click 'Apply	
			Return	Links' to link records to media.	•
				I	

Review your collection in Insight.





If you import media before you import data, you must return to the import media area to apply links in the Linking tab or your content will not appear in Insight. If your media was not linked correctly your content will not appear in Insight.

WORKFLOW #2: ADDING CONTENT WITHOUT IMPORTING DATA

This section describes how to add content to your collection if your media has not been cataloged and a data file does not exist for your content. You will import your media using Insight Studio just as in Workflow #1 but you will skip the Data Import steps. Your data will be added later using Inscribe.

Importing Media



After you have published your new collection, click the **Import Media** button in the Insight Studio Task Menu to start importing media to your collection.

- Click New to create a new batch. A batch represents a group of media items imported at the same time. The batch in the left panel will show the date and time it was created. If you do not create a new batch, a batch will be automatically generated whenever you add content to the Process List.
- 2. Media files can be imported to your collection in one of two ways:
 - a. You can drag files from where they are stored on your file system and drop them onto the Process List panel to the right of the Batch panel.

- b. You can find the media files you want by clicking **Browse** and importing them from your file system to the Process List.
- 3. Once the Process List contains the files you wish to import, click **Import**. A status message will appear to indicate Pending, Processing, Uploading, or Complete for each file. When the entire batch has been processed completely, **Finished Importing Media** will appear at the top.
- 4. Click the **Linking** tab and make sure **No Mapping** is selected. (This is the default for Insight Studio so you should be able to skip the Linking tab entirely for this workflow procedure).

💵 Insight Studio :: Uncatal	oged Collection		
<u>File Task Template W</u>	findow <u>H</u> elp		
Import Media			Help
🛨 Finished importing r	nedia		Importing Media
Use the tabs below to P	rocess, Link, Review and P	ublish your media.	1. Click New to create a batch.
Batch Sep 1, 2005 8:55:11 AM	Process List Linking Define Mapping Method No Mapping O Use External Mapping Fill Mapping File Path: Define field containing mapp Mapping Field Creator Preview Media Filename		 To define the batch, drag and drop media / directories onto the Process Lisk, or click Browse to open a file system explorer. Click Import to process and upload media. Once complete, click the Linking tab to map the imported media to existing data records. To link records-to-media, click Use External Mapping Field Mame Mappings may also be defined in Inscribe after publishing media. Click Apply Links' to link records to media. Click the Review tab to review imported media before publishing to your collection group.
New Delete		Apply Links Retur	6. Click the Publish tab to publish the media to your collection. Click 'Select All Unpublished Media' to select

5. Click the **Review** tab to see thumbnails of your imported media. You will see that the images are categorized as **Not Linked**.

mport Media						Help
🕂 Finished importing n	nedia					Importing Media
se the tabs below to Pi	rocess, Link, Re	view and Pu	blish yo	ur media.		1. Click New to create a batch.
atch	Process List	Linking R	teview	Publish		2. To define the batch, drag
ep 1, 2005 8:55:11 AM	Image	Filename	i l'	Link	Date Processed	and drop media / directories onto the Process List, or click
	1	131.jpg	И	ot Linked	Thu 01 Sep 2005 09	Browse to open a file system explorer. 3. Click Import to process and upload media.
	1	258.jpg	N	ot Linked	Thu 01 Sep 2005 09	3. Once complete, click the Linking tab to map the imported media to existing data records.
		574.jpg	Ν	ot Linked	Thu 01 Sep 2005 09	4. To link records-to-media, click Use External Mapping File, define the Mapping File Path, then define the Mapping Field Name. Mappings may also be defined in inscribe after publishing media. Click Apply Links' to link records to media.
	2	2472.jpg	Ν	ot Linked	Thu 01 Sep 2005 09	5. Click the Review tab to review imported media before publishing to your collection group.
New Delete			Del	ete	Return	6. Click the Publish tab to publish the media to your collection. Click 'Select All Unpublished Media' to select

6. Click the **Publish** tab.

7. Move all unpublished media from the current batch into the Published Media table for

processing by clicking **Select All Unpublished Media** and then clicking the button. Move media objects back to the Unpublished Media table by selecting them and clicking the the button.

💵 Insight Studio :: Uncata	loged Collection					
File Task Template Window Help						
Import Media				Help		
Finished importing	media			Importing Media		
Use the tabs below to F	Process, Link, Review	and Publish your	media.	1. Click New to create a batch.		
Batch Sep 1, 2005 8:55:11 AM	Process List Link Move items to Publi Changes' Unpublished Media (shed or Unpublis	ublish hed Media, then press 'Apply	2. To define the batch, drag and drop media / directories onto the Process List, or click Browse to open a file system explorer.		
	Image	Filename	Link	3. Click Import to process and upload media.		
	Select All Unpublishe		Apply Changes	4. To link records-to-media, click Use External Mapping File, define the Mapping File Path, then define the Mapping		
	Published Media (10	items)		Field Name. Mappings may		
	Image	Filename	Date Published	also be defined in Inscribe after publishing media. Click		
		1131.jpg	Not Published	Apply Links' to link records to media. 5. Click the Review tab to review imported media before publishing to your collection group.		
New Delete		1258.jpg	Not Published Return	6. Click the Publish tab to publish the media to your collection. Click 'Select All Unpublished Media' to select		

8. Click Apply Changes to publish media to your Insight collection.

You do not need to click Apply Changes for your media to be viewed in Inscribe but once you have cataloged and mapped records to your media in the next steps, you will need to publish your media in Insight Studio for the media to appear in Insight. You should click Apply Changes and publish your media now so you do not have to return to Insight Studio to perform this task later.

e <u>T</u> ask T <u>e</u> mplate <u>1</u>	Mindow <u>H</u> elp			
nport Media				Help 🗙
🕂 Publishing change	s saved			Importing Media
e the tabs below to	Process, Link, Review	and Publish your	media.	1. Click New to create a batch.
tch 1p 1, 2005 8:55:11 AM		lished or Unpublis	ublish hed Media, then press 'Apply	2. To define the batch, drag and drop media / directories onto the Process List, or click Browse to open a file system explorer.
	Image	Filename	Link	3. Click Import to process and upload media.
				3. Once complete, click the Linking tab to map the imported media to existing data records.
	Select All Unpublish		Apply Changes	4. To link records-to-media, click Use External Mapping File, define the Mapping File Path, then define the Mapping
	Published Media (1		1	Field Name. Mappings may
	Image	Filename	Date Published	also be defined in Inscribe after publishing media. Click
		1131.jpg	Thu 01 Sep 2005 09:26:42	 'Apply Links' to link records to media. Click the Review tab to review imported media before publishing to your collection group.
New Delete		1258 ina	Thu 01 Sep 2005 09:26:42	6. Click the Publish tab to publish the media to your collection. Click 'Select All Unpublished Media' to select

If your collection contains no data (and no links to that data) you will not see your images in Insight. To view your media in Insight, you must first provide data and link that data to your media. You can do this using Inscribe.

Adding Data in Inscribe

You can provide descriptive data for your media by individually cataloging records using Inscribe.

Cataloging Records by Hand

- 1. Log on to Inscribe. Select the collection you will edit.
- 2. Under Edit, select Record-To-Media Mapping (or use the shortcut keys CTRL+E).
- 3. To view the media you wish to catalog, click **Show unlinked media** in the media panel on the right. You should see the unmapped media files you imported using Insight Studio.



4. Select an image by clicking on it once. It will become highlighted in red.



Optionally, double-click on a thumbnail image to open a reference of that image. You may drag this image anywhere on the screen while you catalog its corresponding data and reference either the image itself or its small thumbnail in the image tool bar.



5. Minimize the Record-to-Media Mapping window. You should see the Data Editor window, which is open whenever you log on to Inscribe. If you have closed this window, click **File**, click **Open Record**, and then select your collection (listed as your catalog template's name or the primary record type of your catalog template).

Data Editor - Simple Labels ? _	. 🗆 ×
Search View Selection View Editor View Table View Record Preferences	
Simple Search	
By Keyword: 🗨 search	h
Advanced Search	
Identifier: contains	
Creator: contains	
Date: contains V	
Description: contains	
save search load search clear search	
new record show all	

- 6. Click new record.
- 7. Add data for your media item. In this example, the Simple Labels template was selected when the new collection was created. You will see the fields for your selected template in this editor window.

Data Editor - Simpl	ile Labels ? -	
Search View	Selection View Editor View Table View Record Preferences	
	K K Record 1 of 1 K K New Record 1	ord
Identifier: *	431	
Creator:	Andrews, A.H. & Co.	
Date:	* 1875	
Title:	Andrews Eight Inch Terrestrial Globe.	
Description:	Globe	
* Indicates a requi	iired field	
	new delete save cancel	

8. Click **Save** after data has been added.

Mapping Data to Media with Inscribe

Once you have created a record for a media item in Inscribe, you must link the two together for the item to appear in Insight.

The following steps can also be used if you import media and data using Insight Studio but do not apply links in the Linking tab of the Import Media process.

- 1. In Inscribe, open or return to the Record-to-Media Mapping window.
- 2. Click **Show unlinked records** in the Records panel on the left. You should see any data records created in Inscribe that have not been mapped to media and any data records that were imported using Insight Studio that were not mapped to media.



3. Click the data record you would like to map (it will become highlighted in red) and then click the corresponding image you would like to link it to. You will receive a confirmation message.



- 4. Click **Yes** to map the data record to the media item.
- 5. Click **Save** to save the mapping.
- 6. Click **Show unlinked records** and **Show unlinked media**. The data record you mapped to a media item should not appear as a result in the unlinked records panel. The media item it was mapped to should also be missing from the unlinked media panel.

Record-to-Media Mapping Tool			? _ 🗆 ×
Records 0	records	Media	9 media
		8288 8288	_
1 of 1 page No records		1 of 1 page Media 1 - 9 of 9	
Description Channelling	Find	Medium ID	Find
Show unlinked records Show all		Show unlinked media Show all	
Simple Labels		Undo Save Clos	e
			///

7. You can check your collection in Insight to see if the mapping was successful. If your media item and record were linked successfully in Inscribe (and your media was published by clicking the Apply Changes button of the Publish tab in Insight Studio's Media Import process), the image will appear in Insight.



Perform this cataloging by hand and mapping process in Inscribe for all media that requires data.

Index

A

, 19, 20, 21
13, 14
9
21, 50
9, 22

C

Cataloging Records	
Cataloging Template	
Code Key	
Collection	
Collection Manager 5, 7, 8, 9, 11,	13, 16, 18, 20, 26, 30, 33,
40, 42, 45, 48, 50, 53	
Controlled Vocabularies	

D

Date	
Delete	. 8, 10, 15, 16, 20, 25, 41, 47, 59
delete collection	
Delimiter	
Dependent	

E

Export15, 17, 25

F

Field Groups	
Fields	
Fuzzy Date	

G

Group	Name	11,	14,	15,	20,	21,	35,	36
Groups	3			. 9,	13,	22,	40,	41

Ι

Importing
Importing Data
Importing Media 58, 59, 63, 64
Independent
Index73
Inscribe 2, 5, 14, 16, 18, 23, 24, 37, 39, 40, 45, 48, 63, 65
66, 67, 69, 70, 71
Insight Administrator Tools7, 8, 9, 16, 18, 21, 47, 50
Insight Shares
Insight Studio 7, 8, 9, 10, 11, 12, 13, 14, 15, 18, 19, 23, 25
26, 32, 33, 35, 40, 42, 43, 45, 46, 47, 48, 49, 53, 54, 63,
64, 65, 66, 69, 70
Insight Studio Access7,9,10
Institutional Collections

\overline{J}

Java	
Java Client	
JPEG2000	

L

Linking	9, 63, 64, 69
Log	1, 12, 14, 66
Long Text	23, 37, 38

M

Managing Users7,	11
Mapping60, 64, 66, 67,	69
Media2, 15, 16, 29, 40, 58, 61, 63, 65, 66, 67, 69,	70
Media Group	15
Media Manager	5
Multi-Page Document	15

N

New Collection	42, 48
Numeric23,	37, 39

0

ObjectID	
Order	

P

Permissions	
Personal Insight	5
Presentation	
Profiles	

S

hares19

Short Text	23, 37, 38
Sort	29, 40, 41
SPS	

T

Template23, 25, 26, 27, 28, 30, 33, 40, 42, 48	
Theme	
Thumbnail41	

U

URL	
User Group	
User Groups	
User Manager	

\overline{V}

Virtual Collection	
Vocabularies	

X

XML	
XML Gateway 6	