6.3

Luna Imaging Inc.

Insight® + LUNA

Insight 6.3 User's Guide to Basic Collection Building

Insight® + LUNA

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TABLE OF CONTENTS

INSIGHT AND LUNA ARCHITECTURE 4
LUNA Components are as follow: 5
Insight's Components are as follow: 5

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 8
Enabling Insight Studio Access to a User Manager 9
INSIGHT STUDIO USER MANAGEMENT 10
Insight User Management Concepts 11
Managing Users 11
Adding a User 11
Assigning a User to a User Group 12
Adding a User Group 13
Default Profile Privileges 15
Creating New Profiles Using the Insight Administrator Tools 16
Inscribe Profile Privileges 18
Insight Shares 19
MULTI-COLLECTION ACCESS 20

CREATING A CATALOG TEMPLATE 23

Common terms 23
Catalog Template 23
Field 23
Field Group 23
Independent Records (An Authority record) 23
Dependent Records 24
Controlled Vocabularies 24
Catalog Template Tools 25
CREATING A FLAT CATALOG TEMPLATE 25
CREATING A CATALOG TEMPLATE WITH RELATIONS 31
General Rules for Field Groups 33
Steps 33
Field Group Types 35
Field Types 37
Date 37
Long Text and Short Text 38
Numeric 39
Required 40
MODIFYING AN EXISTING CATALOG TEMPLATE 40
Steps 40

CREATING A NEW COLLECTION 42

CREATING AN INSTITUTIONAL COLLECTION 42
ADDING YOUR COLLECTION TO LUNA 48
CREATING A VIRTUAL COLLECTION 48
MANAGE VIRTUAL COLLECTION CONTENT 50

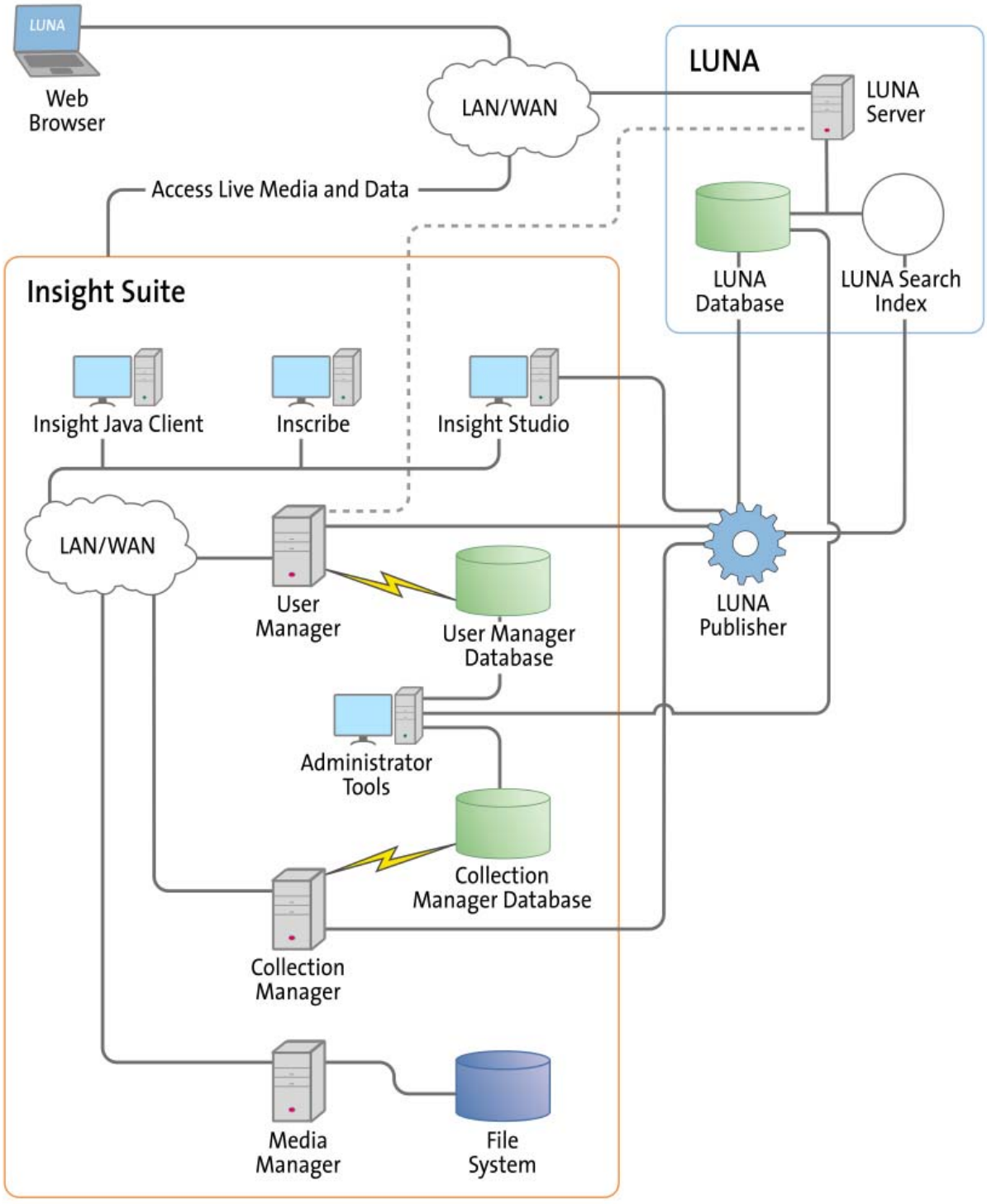
ADDING CONTENT TO A COLLECTION 53

WORKFLOW #1: ADDING CONTENT WITH IMPORTED DATA 54
Importing Data 54
Importing Media 58
WORKFLOW #2: ADDING CONTENT WITHOUT IMPORTING DATA 63
Importing Media 63
Adding Data in Inscribe 66
Cataloging Records by Hand 66
Mapping Data to Media with Inscribe 69

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

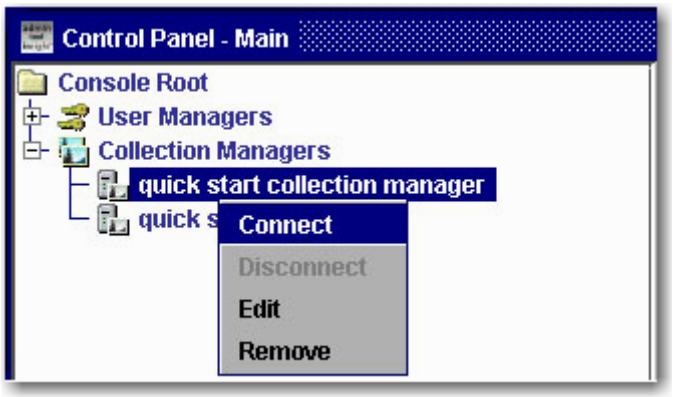
By default, when a new Insight system is installed, the administrator account created during installation is granted access privileges to Insight Studio and the Insight Administrator Tools.

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

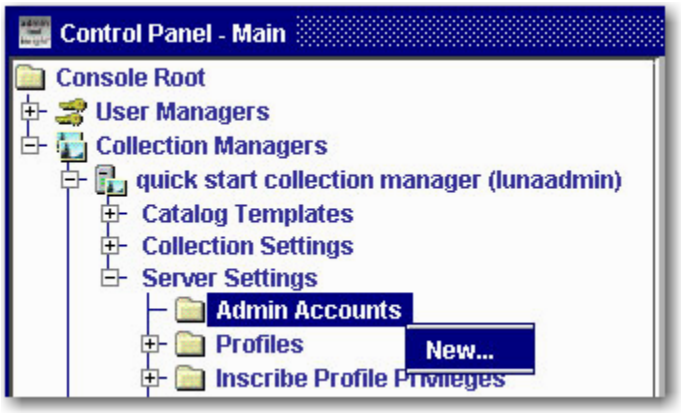
Enabling Insight Studio Access to a Collection Manager

1. Open Insight Administrator Tools.

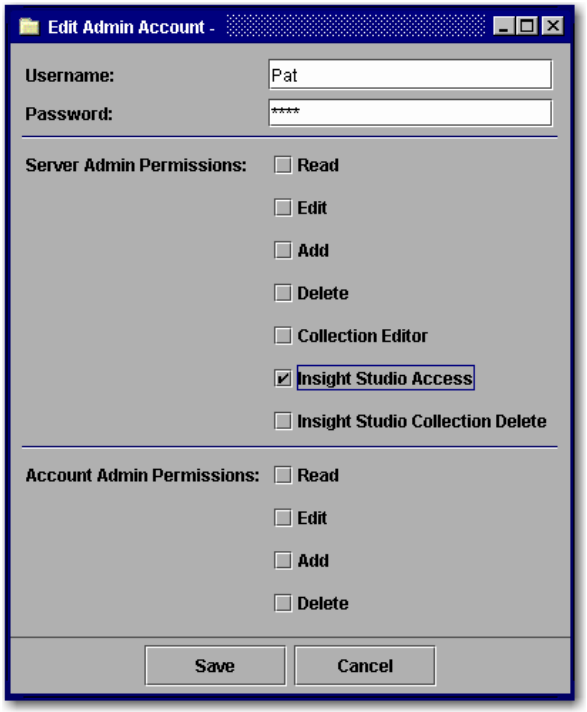
2. Connect to the Collection Manager you want to grant access to by right-clicking (control-click on the Mac) on the Collection Manager name and selecting **Connect**.



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**.



Adding a User to the User Manager

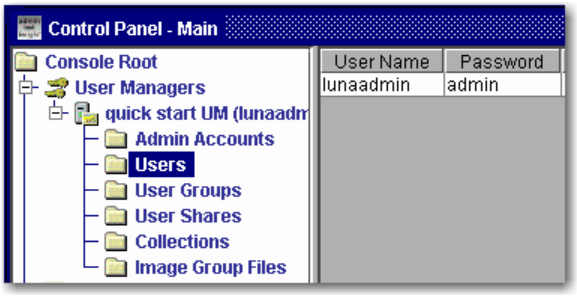
Once the Administrator User has the appropriate permissions in the Collection Manager, you must confirm that there is a matching user in the User Manager.

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

1. Open Insight Administrator Tools.

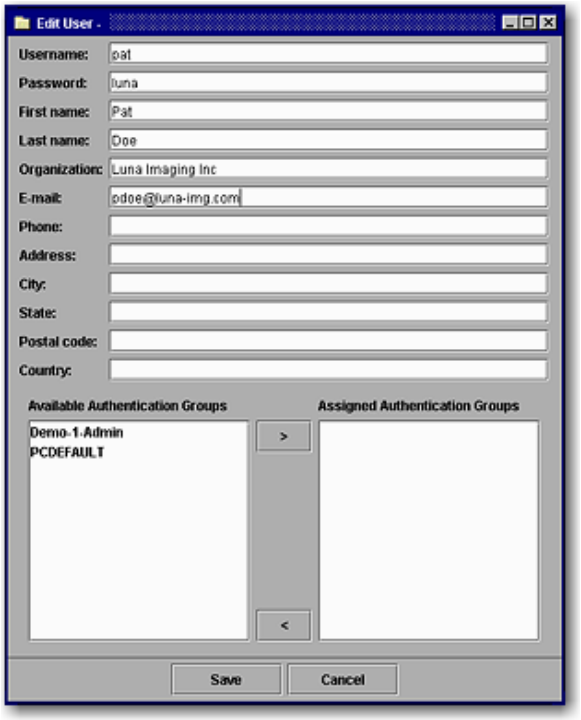
2. Connect to your User Manager by right-clicking on the User Manager name and selecting **Connect**.

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.

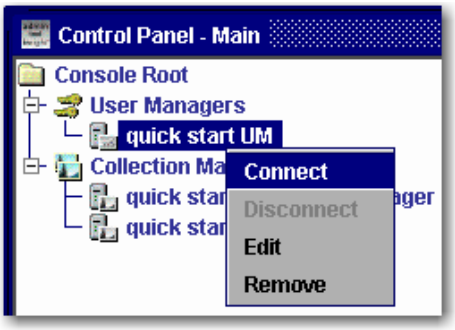


6. Insight Studio only verifies a valid username and password during login, so you do not need to assign Authentication Groups. Click **Save**.

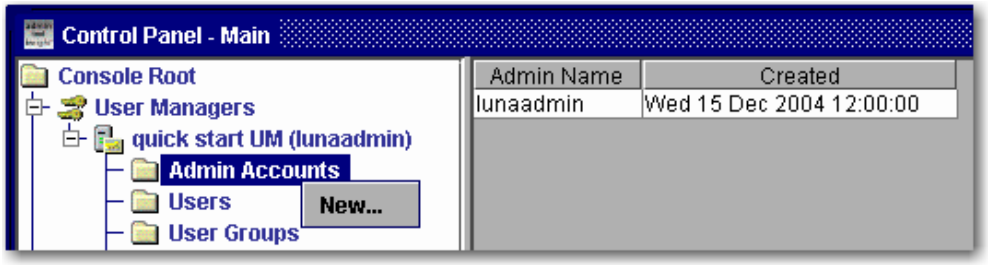
Enabling Insight Studio Access to a User Manager

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**.



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**.

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

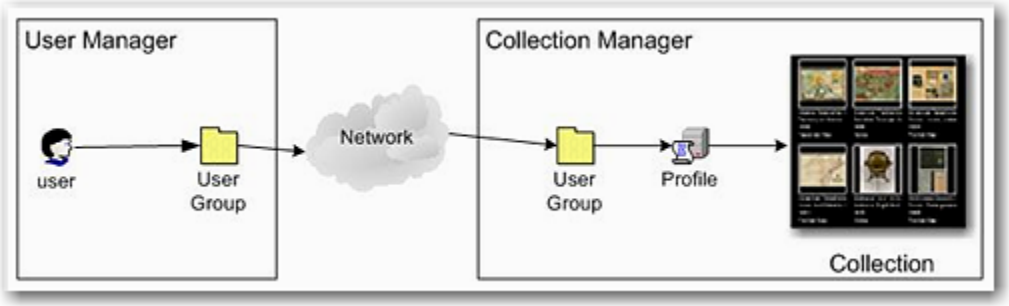
INSIGHT STUDIO USER MANAGEMENT

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

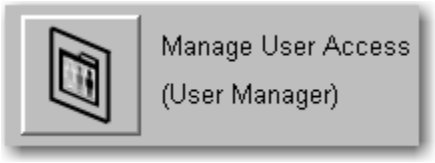
User group: Made up of a Group Name and Access Key (Code Key). These two elements control access between a User Manager and a Collection Manager.

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

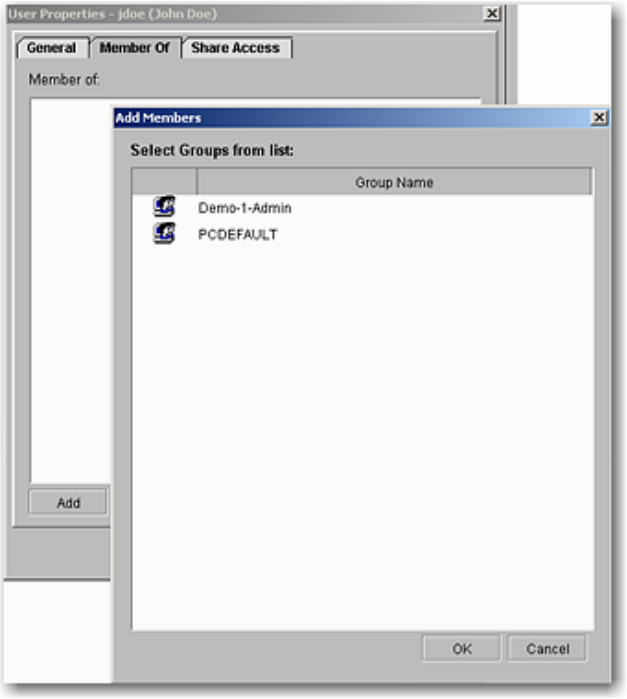
1. Click **Add**.

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

Assigning a User to a User Group

There are two ways to do this:

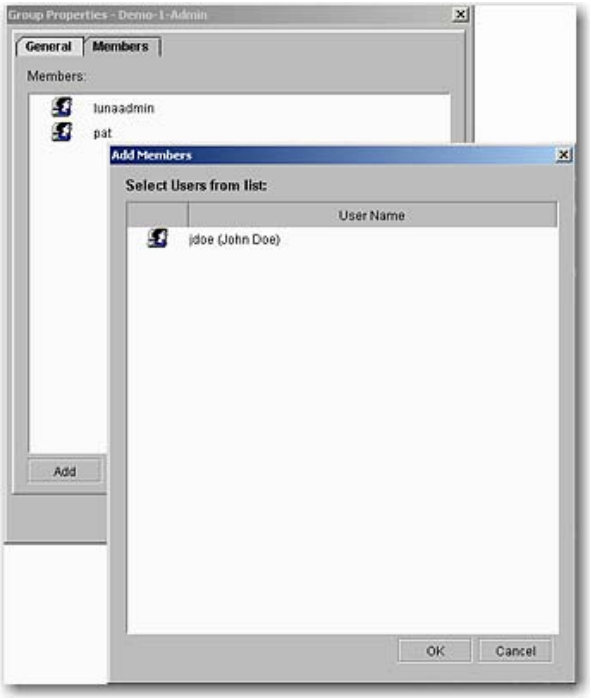
1. Select **Manage User Access** from the Insight Studio Task Menu. Select **Users** from the Access Type menu, then select the user from the User Name list in the right panel and click **Properties**.



   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**.

2. 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.

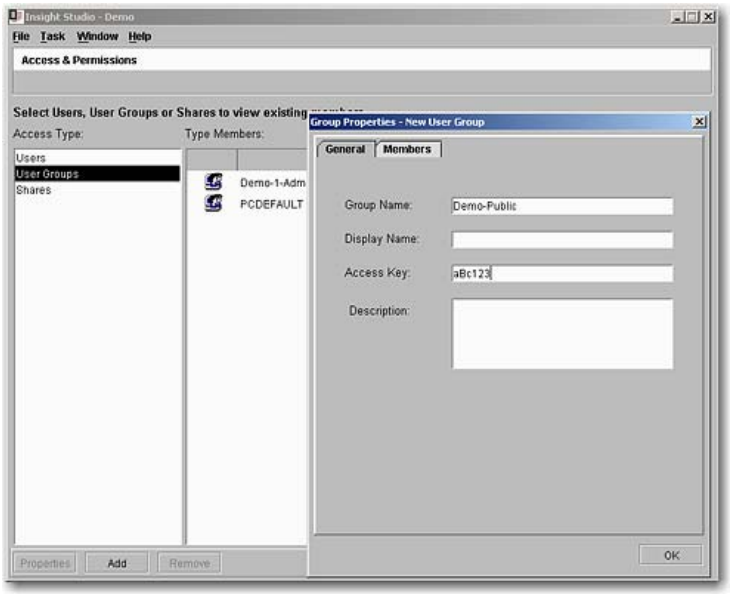
In the Insight Studio Task Menu, you will need to add the User Group using both the **Manage User Access** and the **Manage Collection Access** tools.

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.



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.

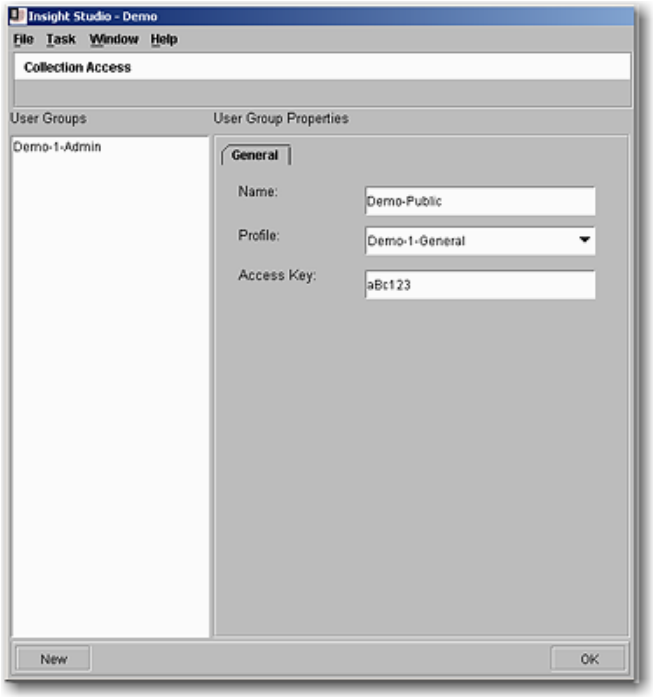
6. Click **OK**.

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.



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.

Default Profile Privileges

	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

Default Inscribe Profile Privileges

	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

> 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

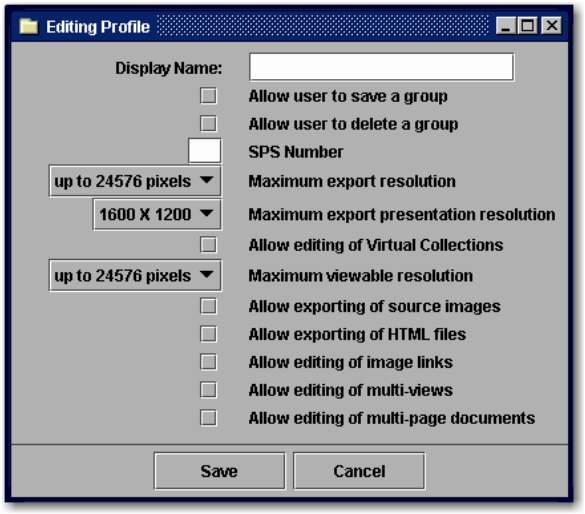
Collection Profiles allow you to control the type of privileges a group of users may be granted within a collection.

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**.



- *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.

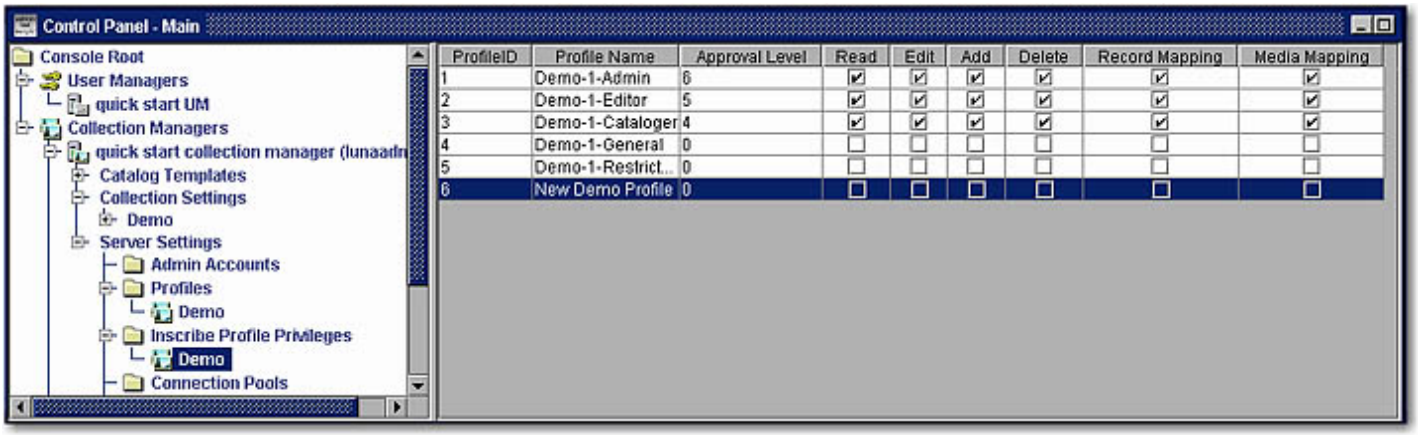
  Note: This privilege should only be granted to collection owners and is not intended for General-Access profiles.
- *SPS Number* - The Storage Path Segment (SPS) refers to the machine on which the images accessed in Insight reside. This is a partial URL to the media files stored on the image server. 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.

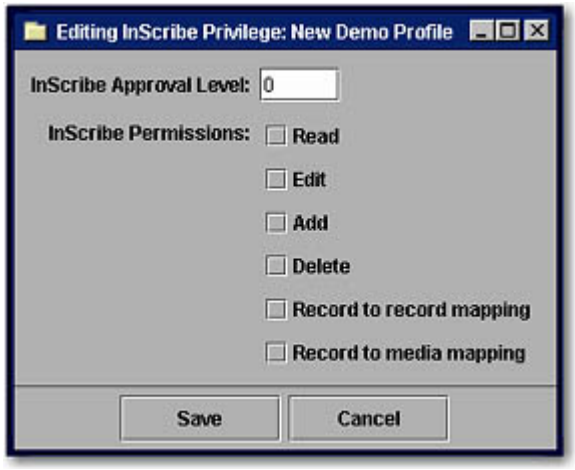
Once you have saved this profile, you will be able to select it in Insight Studio.

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.





- *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

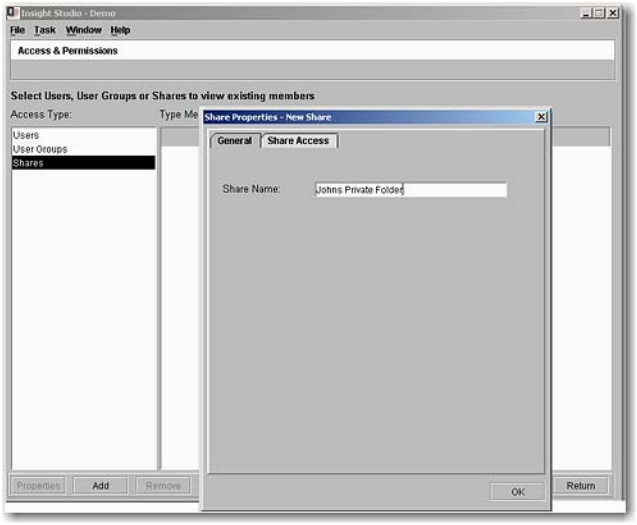
Insight Shares act as network folders where users can store and access media groups, annotations, and web links.

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.

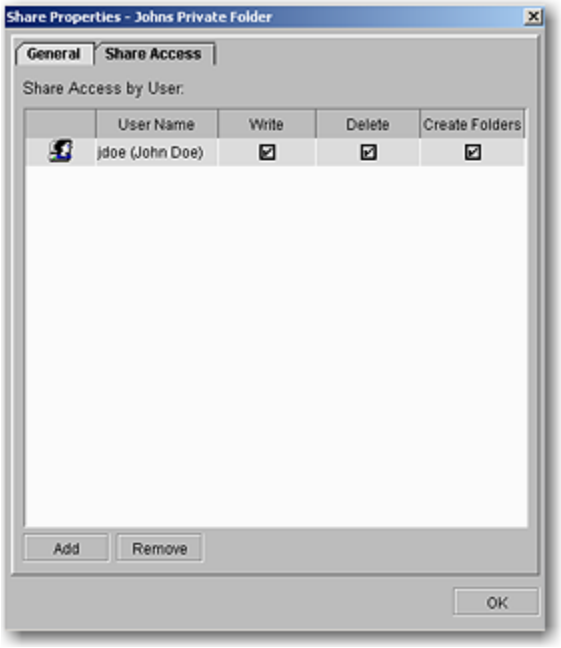
> If a user creates a group of images in a share, the user will be able to delete that item from the share regardless of the user's privilege to delete. The delete privilege allows a user to delete items from a share regardless of who created the item.

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**.



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

> A user with share access automatically has read privileges. The Create Folders privilege allows a user to create subfolders within the share directory.

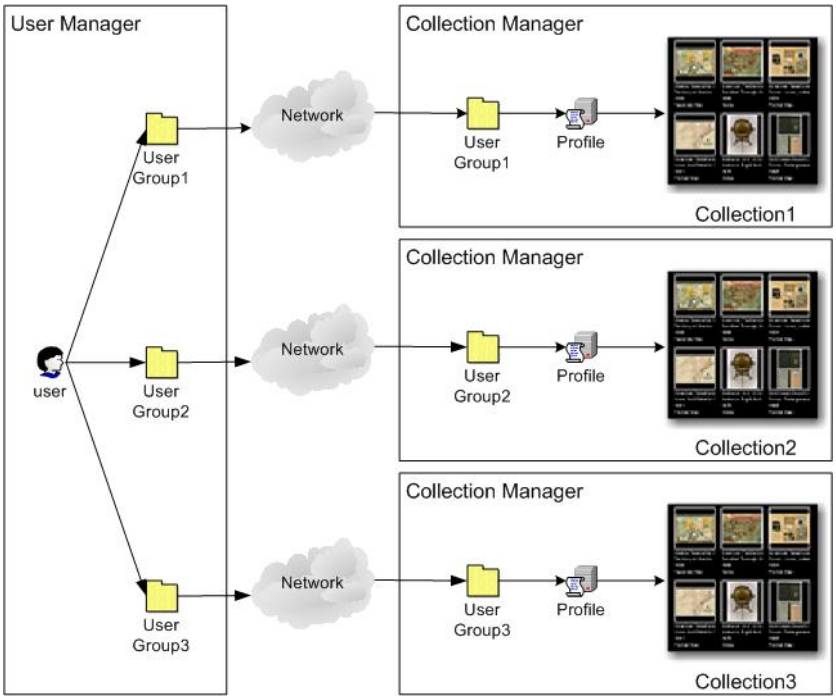
8. Click **OK**.

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.

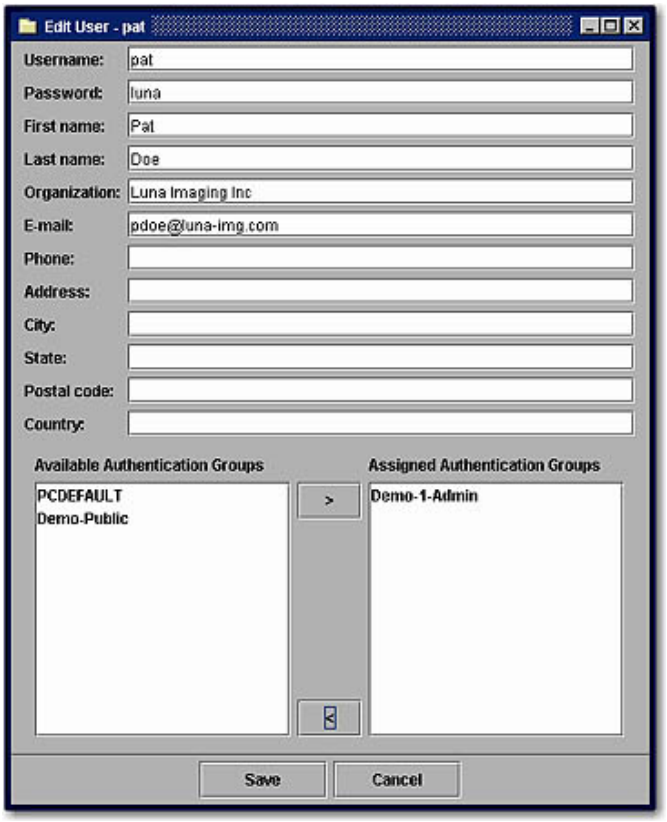


Once you have added your Group Name and Access Key (Code Key) to the User Manager, either through Studio or the Administrator Tools, you will need to use the Insight Administrator Tools to grant access to users.

1. Open Insight Administrator Tools. Connect to the User Manager by right-clicking 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.



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.

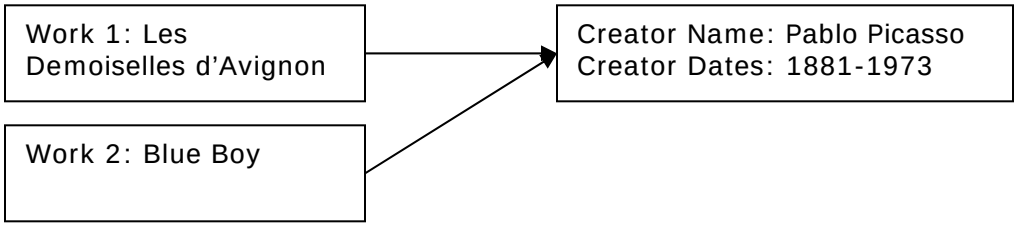
Field Group

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

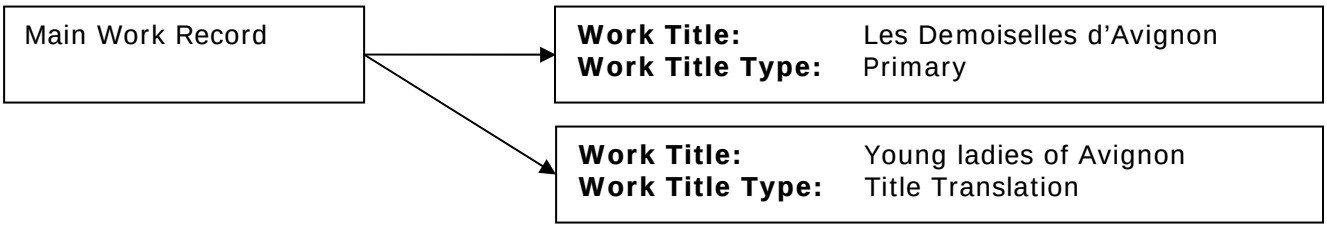


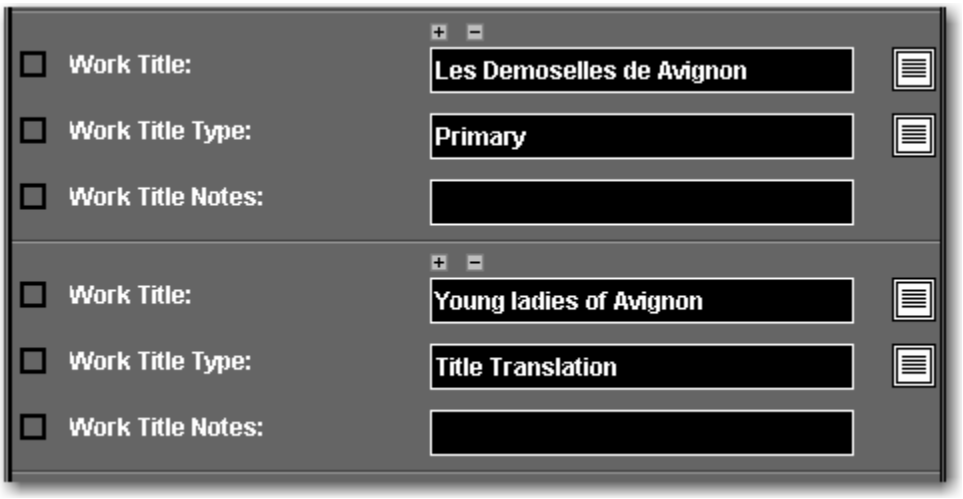
In the example above, both Work Records (Work 1 and Work 2) link to the same creator information (Creator 1). If the Creator Record is updated, both records will share the updated data.

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.

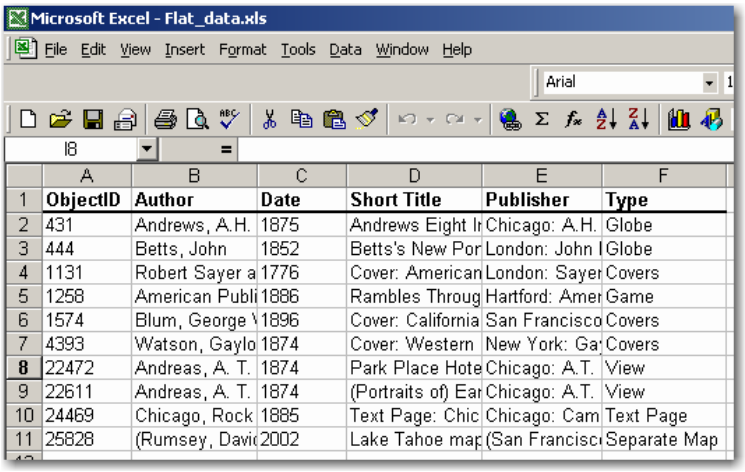
Export a template: by selecting a template from the list and clicking this icon, you can export the template's properties to a location on your file server and later use this template in Insight Studio.

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.

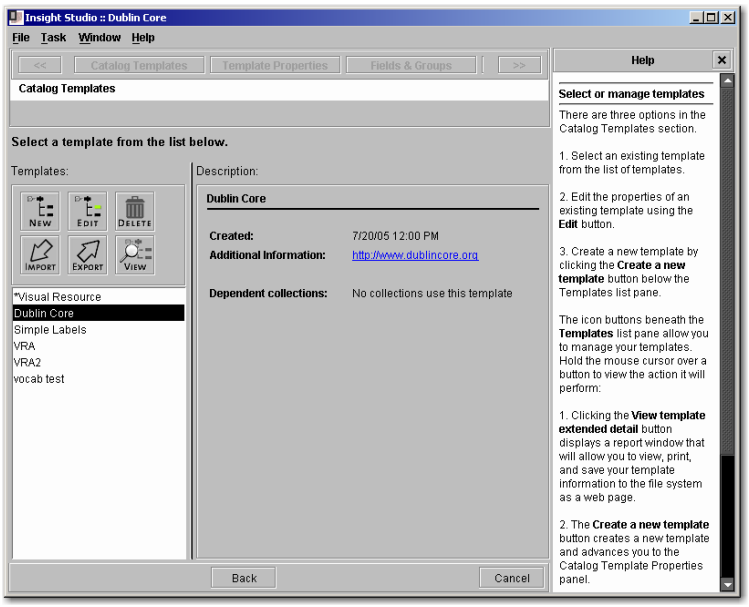
CREATING A FLAT CATALOG TEMPLATE

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.



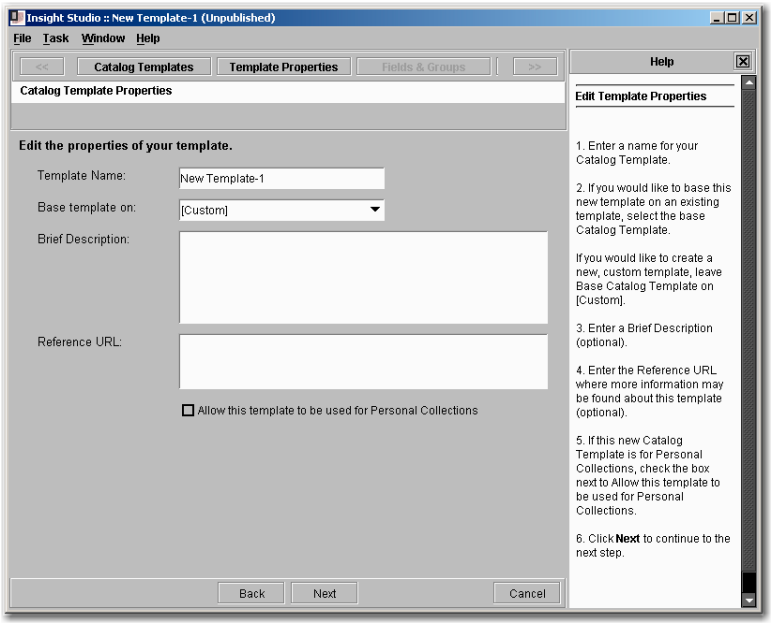
1. After logging into Insight Studio, select the Collection Manager you'd like to use and double-click **Manage Catalog Templates.**

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.

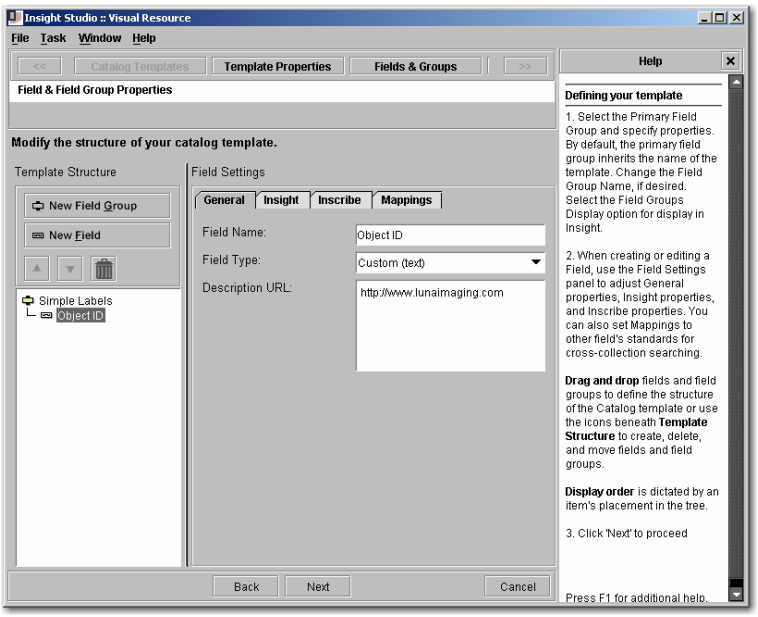


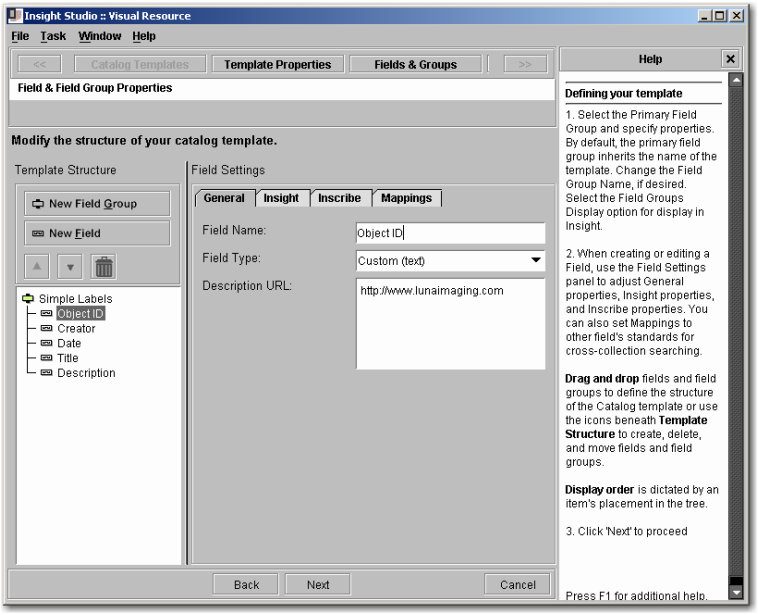
4. Click **Next** to proceed.

5. Click the

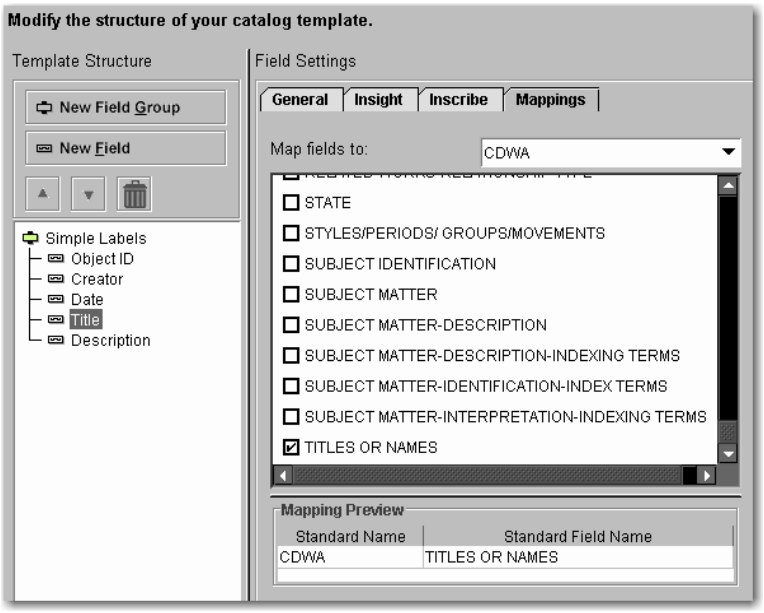
icon to add new fields. Enter a Field Name and choose an appropriate Field Type (see page 34).

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

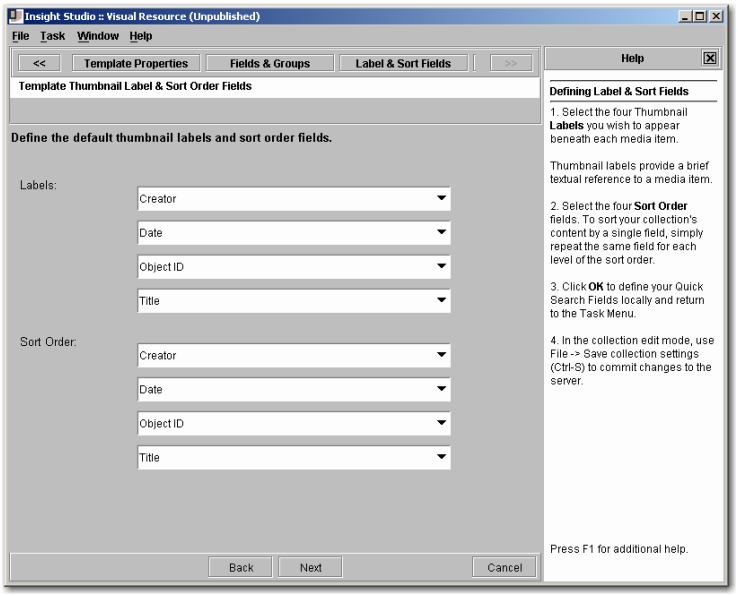




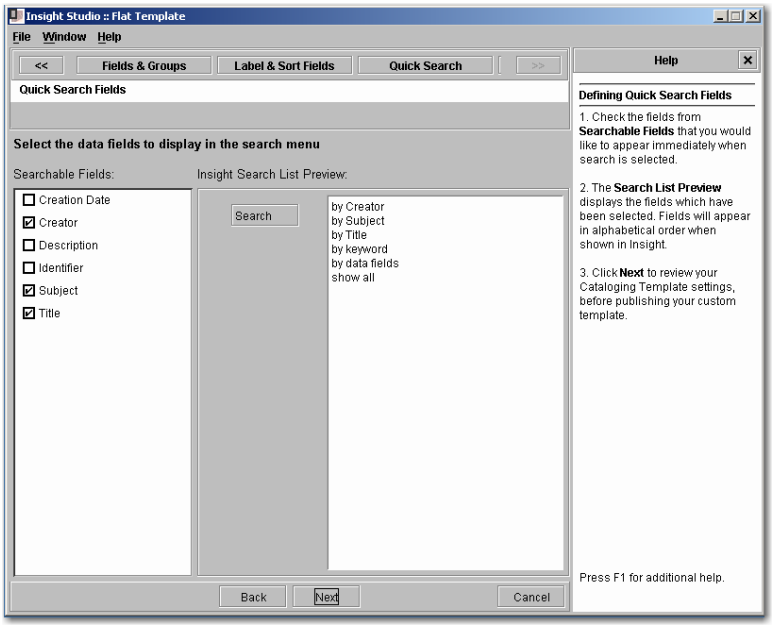
6. To perform cross-collection searches, you will be required to format your custom fields to the CDWA standard. Select a field from the Template Structure panel and click the **Mappings** tab in the Field Settings panel. Scroll through the list of available fields in the CDWA standard and choose the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



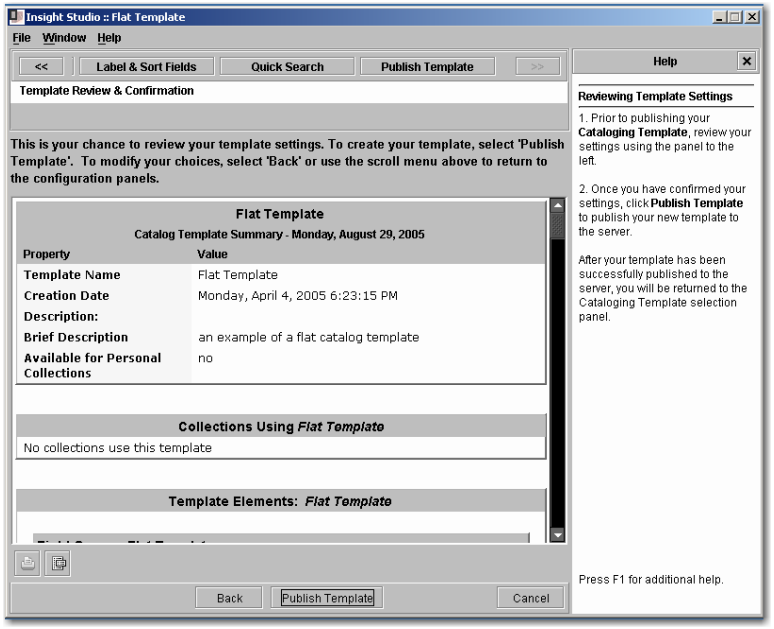
7. Select four fields for **Labels** and **Sort Order**. The fields selected for Labels will appear in the Group Workspace in Insight. Media in Insight will be sorted based on the fields selected for Sort Order. Click **Next** to proceed.



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.



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.



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.

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

ObjectID	Short_Title	Pub_Date	Pub_Note	Pub_List_No	Pub_Type
431	Andrews Eight I	1875	See note fiel	5517	Globe
444	Betts's New Po	1852	See note fiel	4362	Globe
1131	Cover: Americar	1776	This small ha	875	National 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 Map
22472	Park Place Hote	1874	Special ed. v	3034	State Atlas
22611	(Portraits of) Ea	1874	Special ed. v	3034	State Atlas
24469	Text Page: Chicago Rock Is		Folds into se	5249	Timetable Map
25828	Lake Tahoe ma	2002		5706	Separate Map

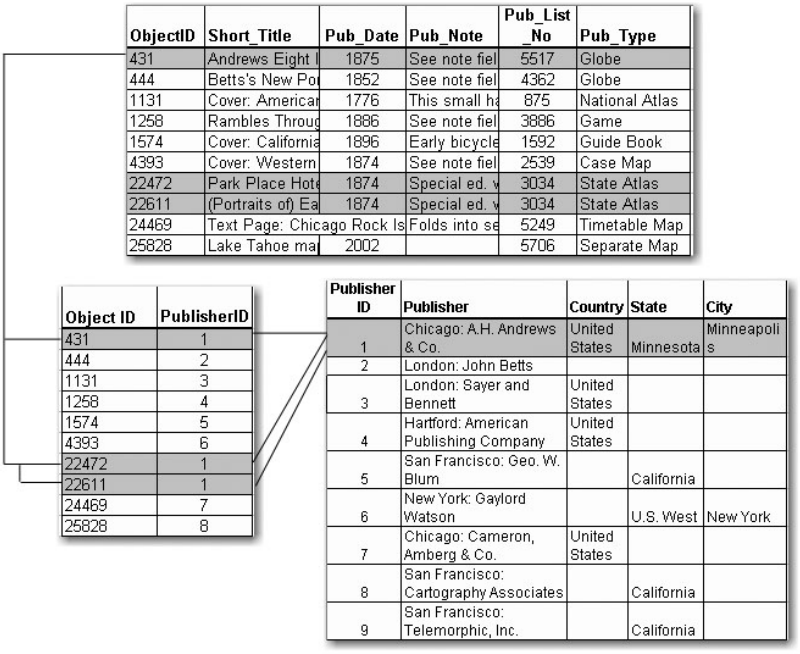
Object ID	Author ID
431	1
444	2
1131	3
1131	4
1258	5
1574	6
4393	7
22472	8
22611	8
24469	9
25828	10

AuthorID	Author
1	Andrews, A.H. & Co.
2	Betts, John
3	Robert Sayer
4	John Bennett
5	American Publishing
6	Blum, George W.
7	Watson, Gaylord
8	Andreas, A.T.
9	Chicago, Rock Island and Pacific Railway Company
10	Rumsey, David

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

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

Object ID	PublisherID
431	1
444	2
1131	3
1258	4
1574	5
4393	6
22472	1
22611	1
24469	7
25828	8

Publisher ID	Publisher	Country	State	City
1	Chicago: A.H. Andrews & Co.	United States	Minnesota	Minneapolis
2	London: John Betts			
3	London: Sayer and Bennett	United States		
4	Hartford: American Publishing Company	United States		
5	San Francisco: Geo. W. Blum		California	
6	New York: Gaylord Watson		U.S. West	New York
7	Chicago: Cameron, Amberg & Co.	United States		
8	San Francisco: Cartography Associates		California	
9	San Francisco: Telemorphic, Inc.		California	

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:

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

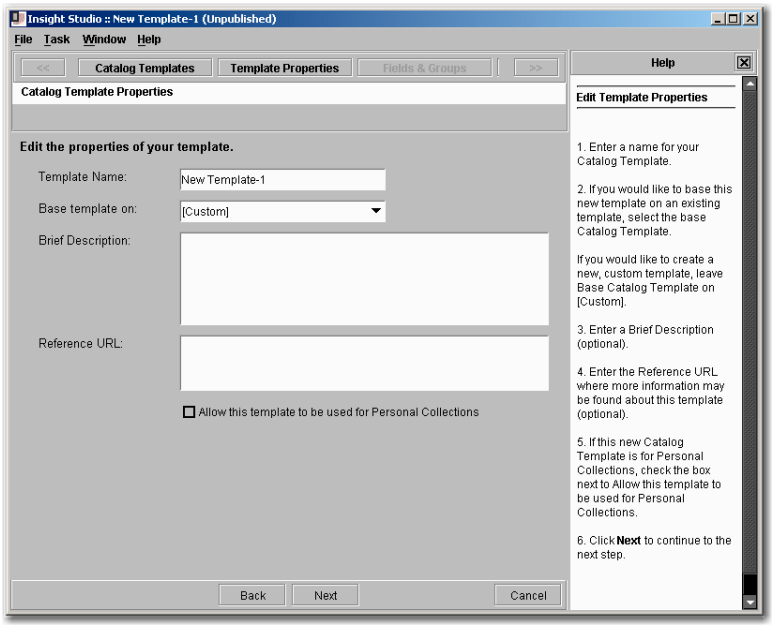
-- Vocabularies can only contain one field.

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.

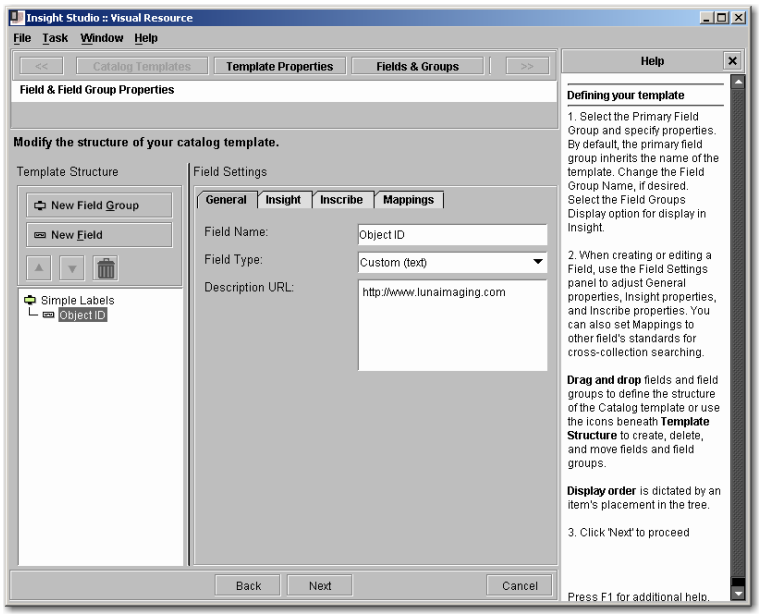
2. Click the

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.



3. Click the

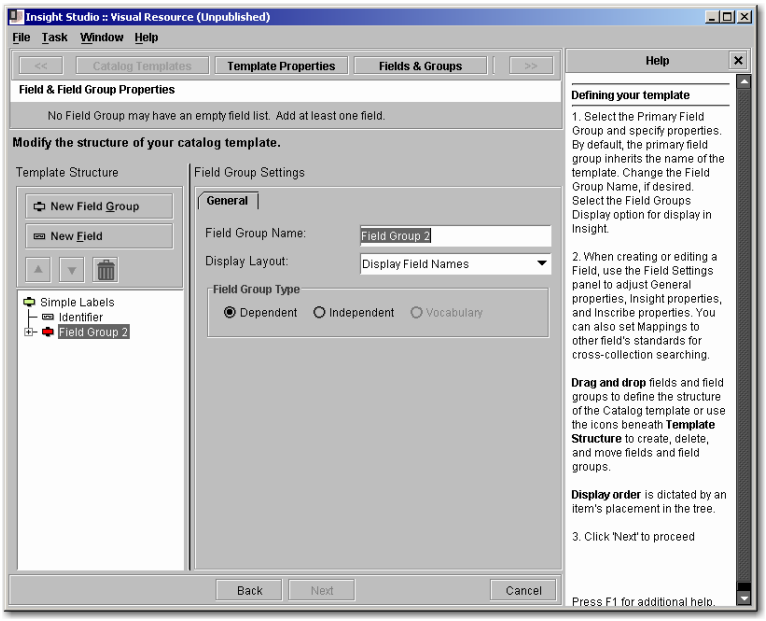
button to add new fields. Enter a Field Name and choose an appropriate Field Type. Fields that exist at the root of the template will be the fields that belong to the primary record. In the next steps, you will create records that relate to the primary record.



4. To create a new relational record, click the

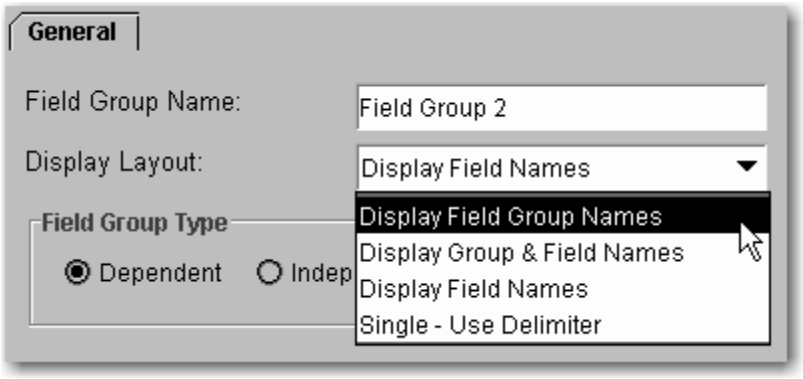
button to create a new Field Group. Insight Studio will automatically create a new record type when a Field Group is created. Enter a Field Group Name, choose a Display Layout and select the appropriate Field Group Type (record type). Refer back to the *Common Terms* section for more details on Field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

Field Group Types

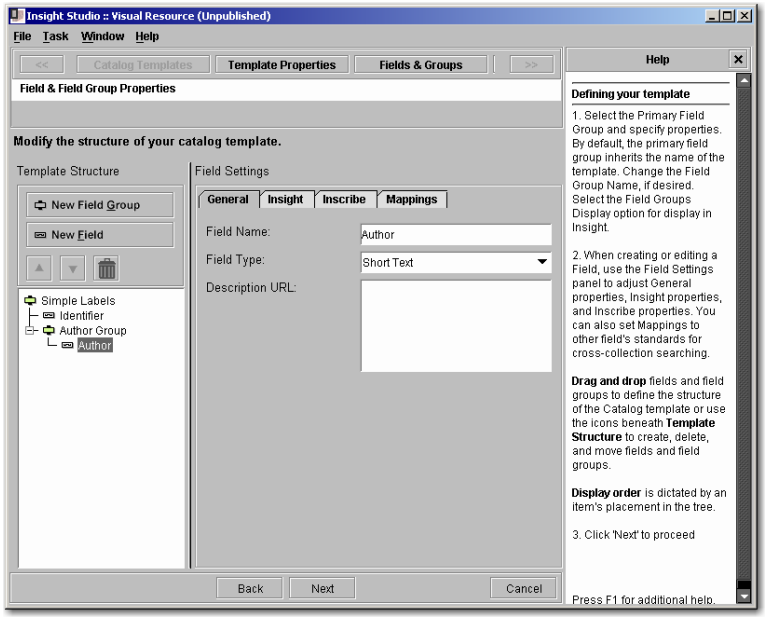


Display Layout Options

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)



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.



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

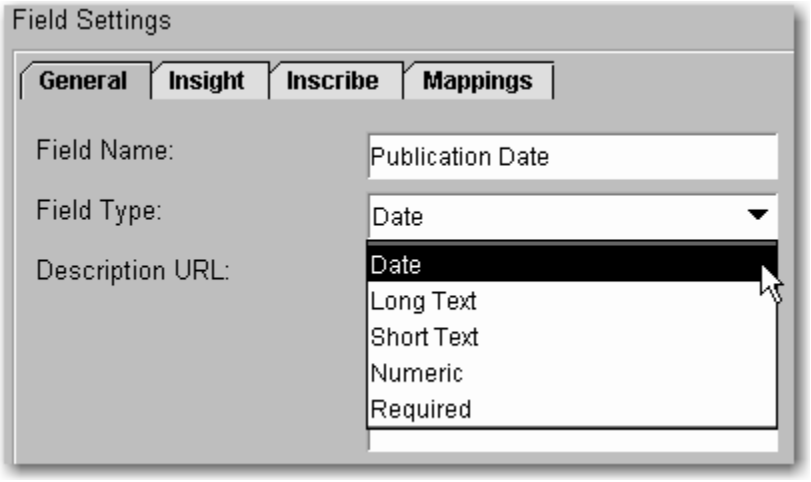
Fuzzy Dates – If a field has been defined as a Date field, there are certain requirements of the values that are entered. Dates may be entered with considerable flexibility of expression. You may enter specific dates, periods, or date ranges using a variety of forms.

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	**Examples**
Numeric Date Format	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.



Long Text and Short Text

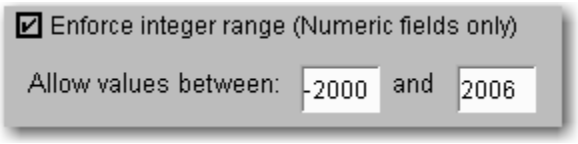
Long Text will represent data in the data display of Insight by wrapping it back to the beginning of the line. See the **Note** field in the example to the left.

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.

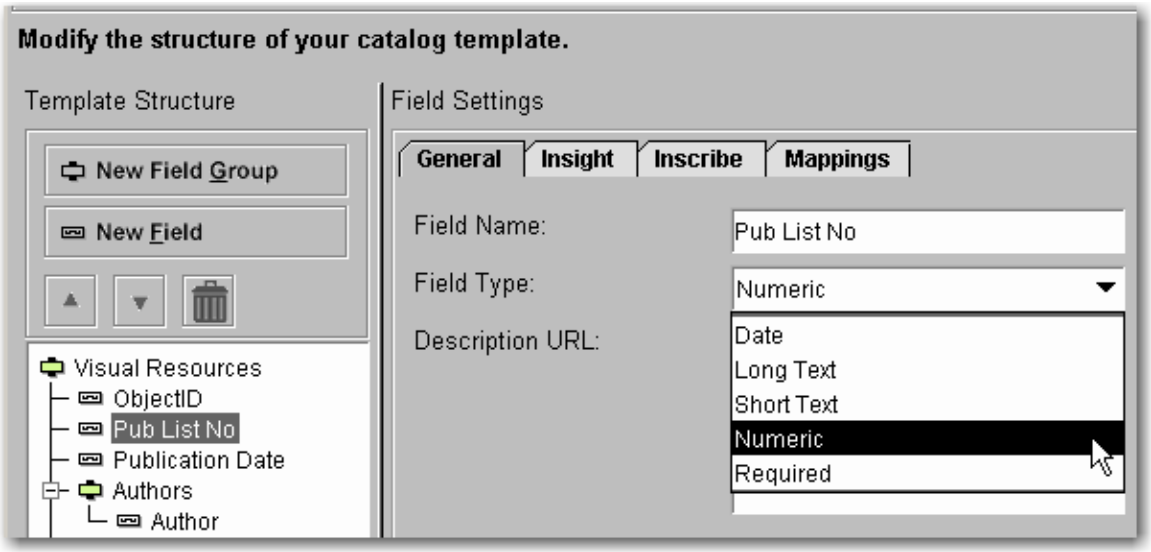
Numeric

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:



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.



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.

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.

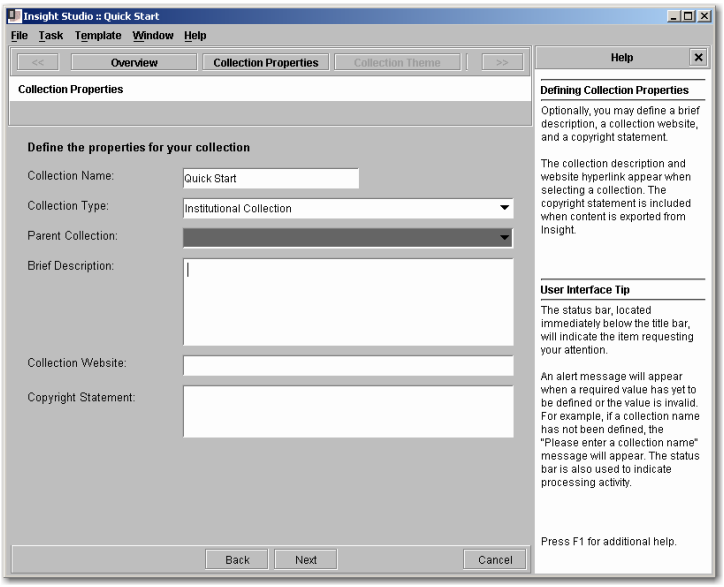
Virtual Collection

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

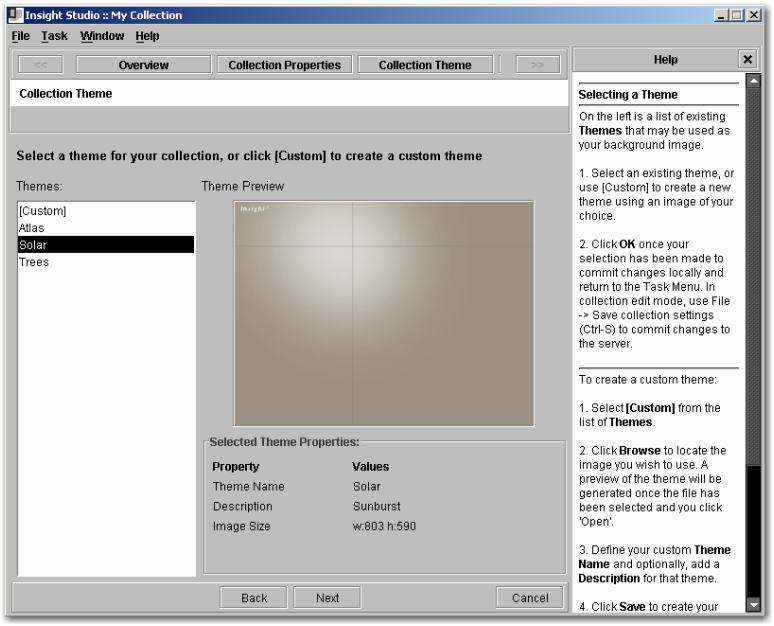
CREATING AN INSTITUTIONAL COLLECTION

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.

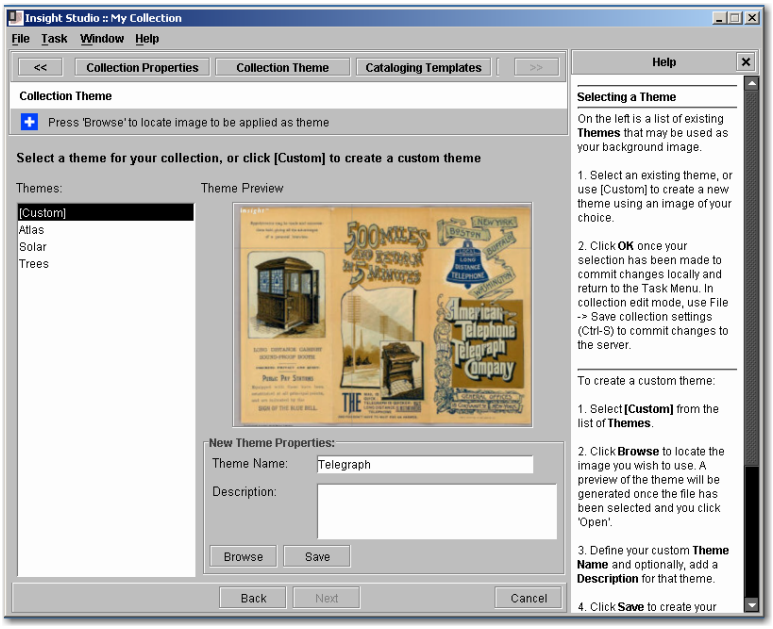


6. Select an existing theme for your Insight collection from the Themes panel. A preview of this background image will appear to the right. Click **Next** to select that theme and proceed.



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.

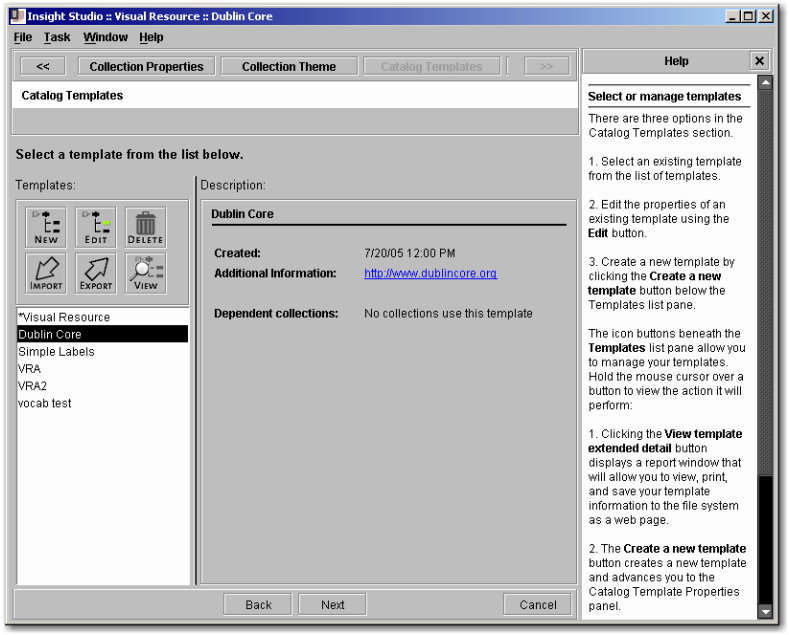


8. Review the Catalog Templates summary.
9. Select a catalog template from the Templates panel that best fits your existing data or the data that you will create later. A description of the template will appear to the

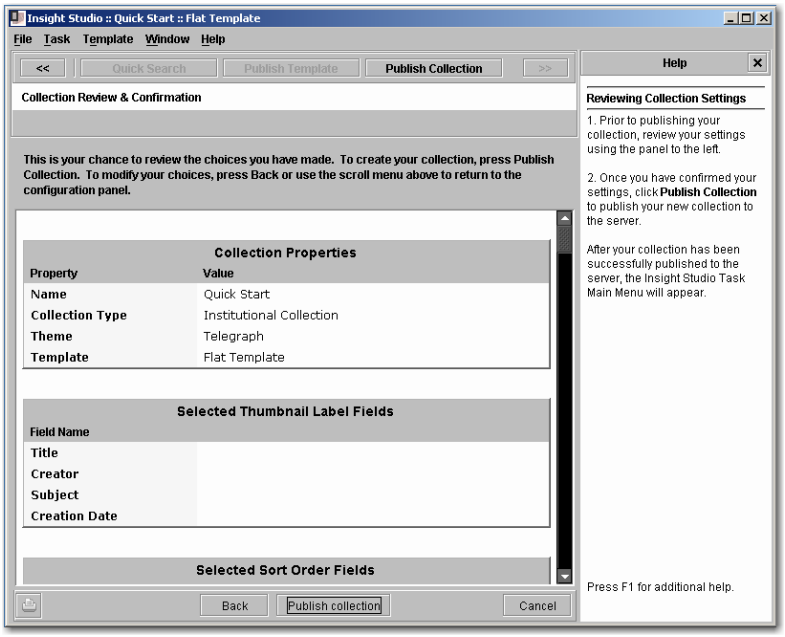
right. For more details about the template, click the

button in the Templates panel. Click **Next** to proceed.

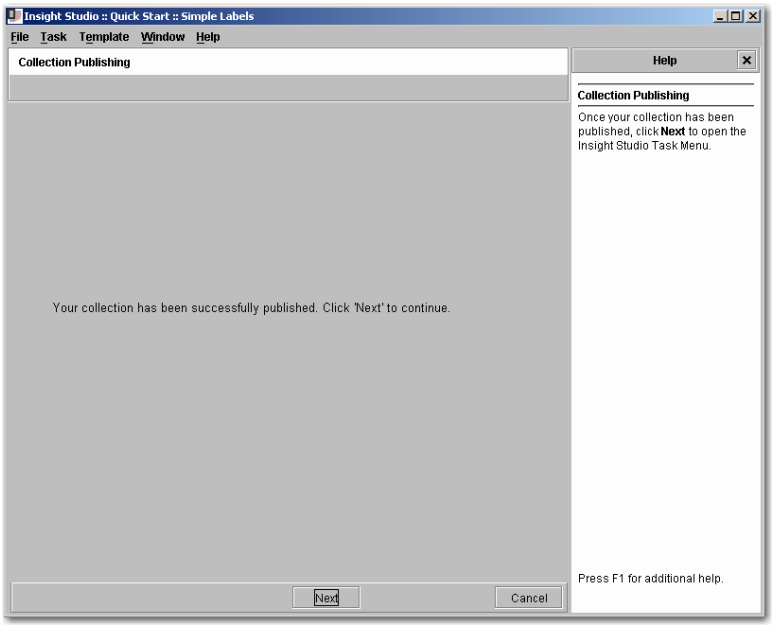
Available templates in Insight Studio include Dublin Core, Simple Labels and VRA. Any custom templates that you create and save will also be listed here. You can edit a template, create a custom template, or import a template while creating your new collection. For more information about editing, creating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

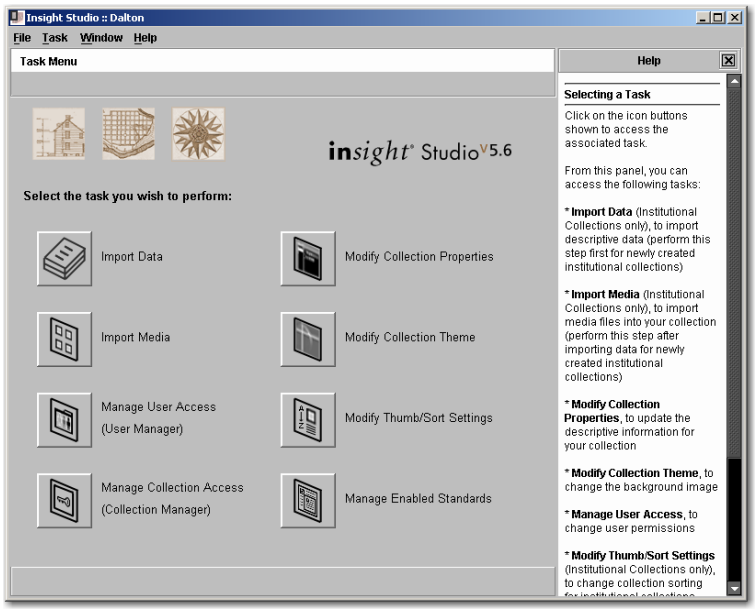


10. Review your new collection's properties. Click **Publish Collection** to save your changes. Your collection will now be listed as an available collection in the Collection Manager when you log into Insight, Insight Studio, and Inscribe.



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

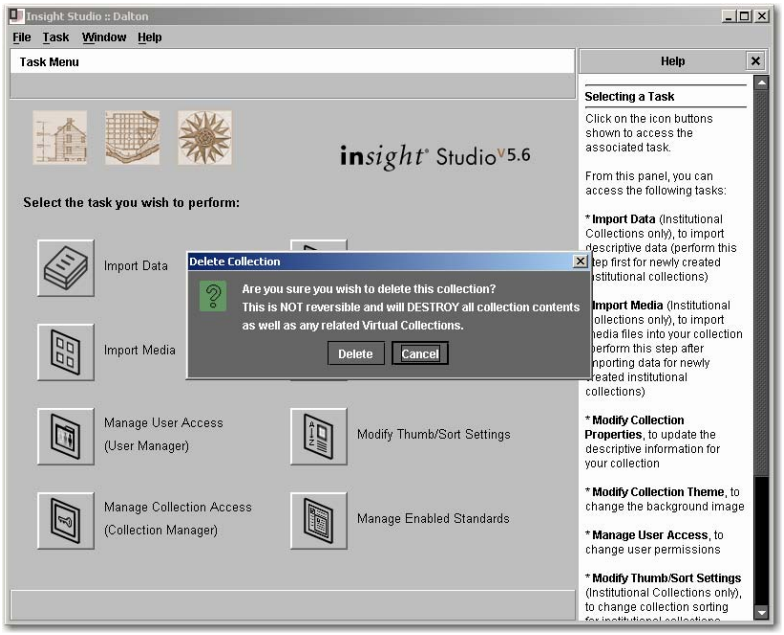




Once your collection has been published, you can modify the collection's descriptive properties, its theme, and its thumb/sort settings via Insight Studio's Task Menu. You can also add data and media to your collection via this menu, as well as manage user and collection access and enabled standards.

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.



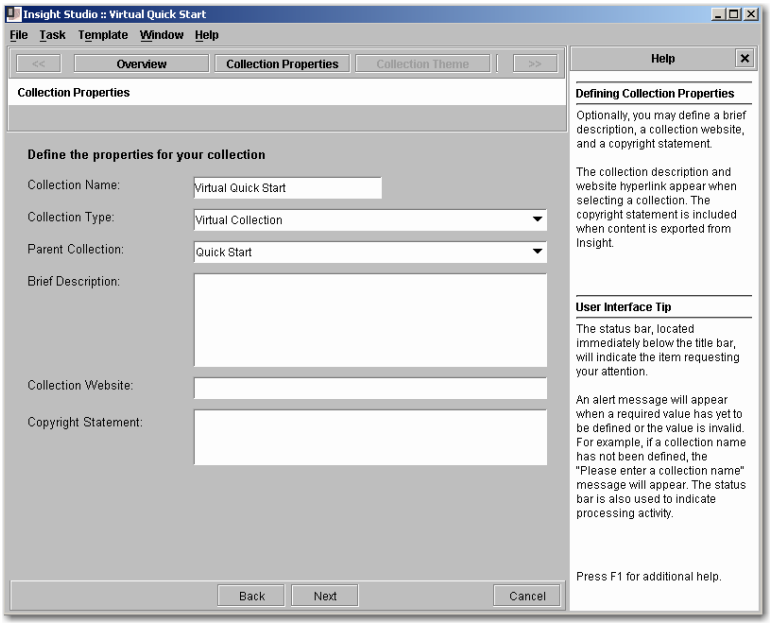
ADDING YOUR COLLECTION TO LUNA

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

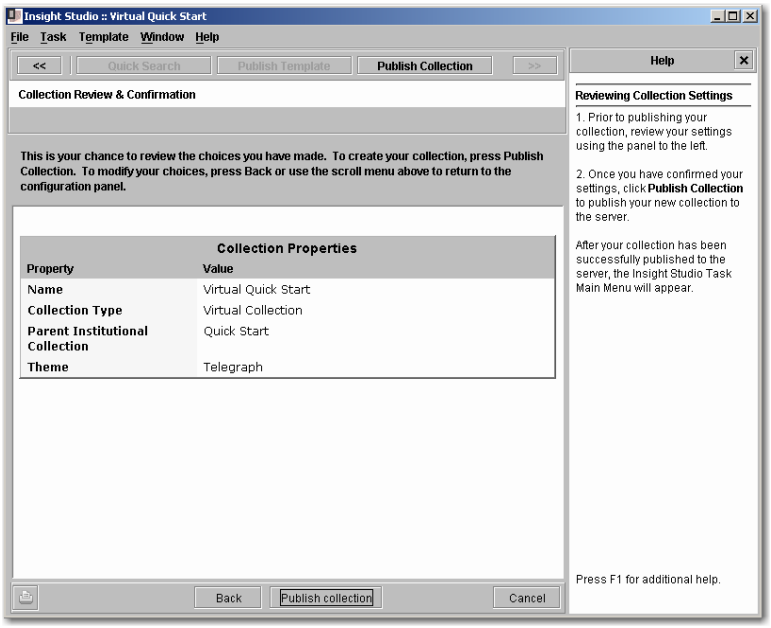
CREATING A VIRTUAL COLLECTION

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.

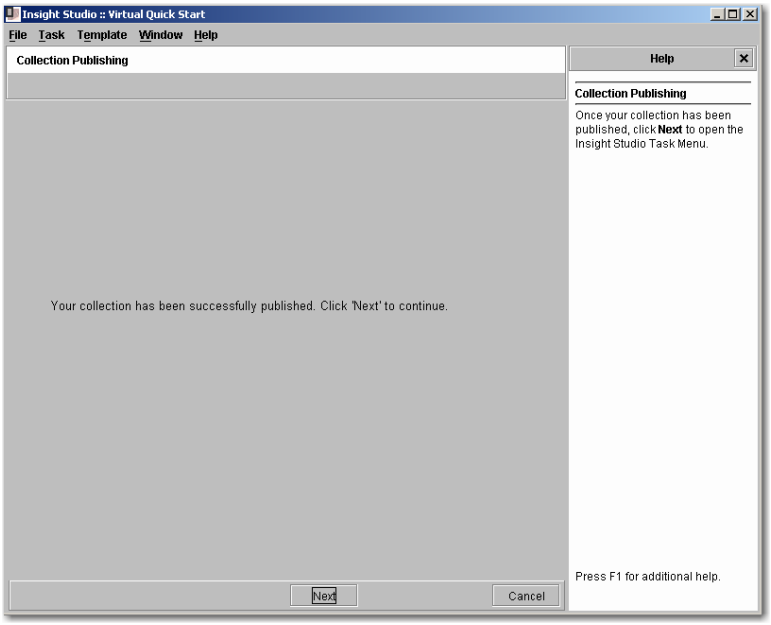
1. After logging into Insight Studio, select the Collection Manager you'd like to use and double-click **Create New Collection**.
2. Read the Insight Studio summary and click **Next**.
3. Read the Collection Properties summary and click **Next**.
4. Enter a Collection Name. Select **Virtual** as your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



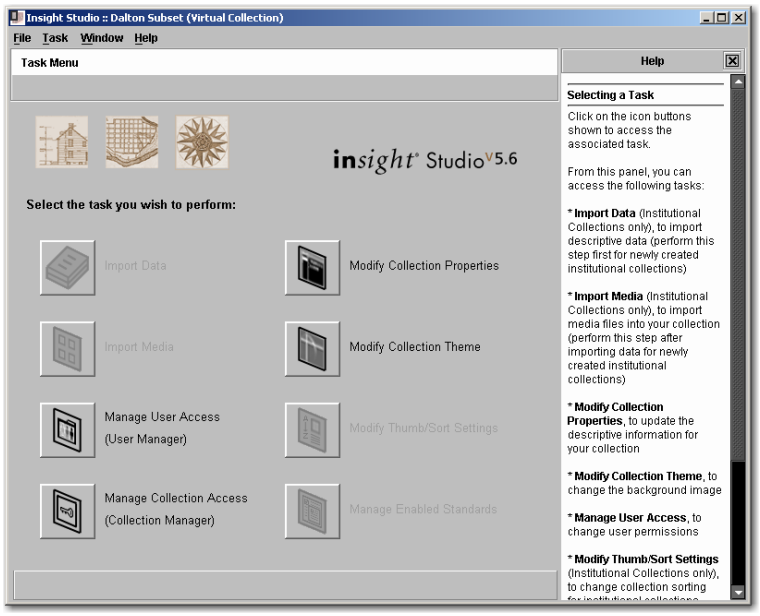
6. Optionally, provide a Brief Description, Collection Website and Copyright Statement for your collection. Click **Next** to proceed.
7. Select a theme for your collection (See steps 6 and 7 in **Creating an Institutional Collection**).
8. Review your new collection's properties. Click **Publish collection** 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.



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



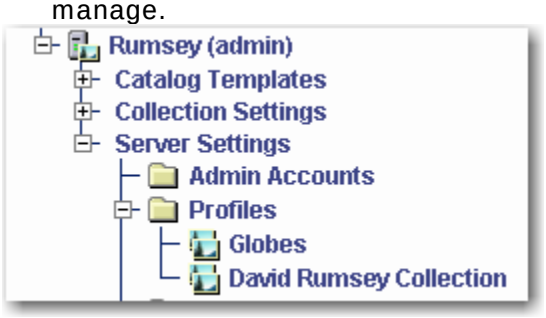
You will not be able to import data, import media, modify thumb/sort settings, or manage enabled standards with a virtual collection. These properties and the content of your virtual collection are borrowed from the parent institutional collection.



MANAGE VIRTUAL COLLECTION CONTENT

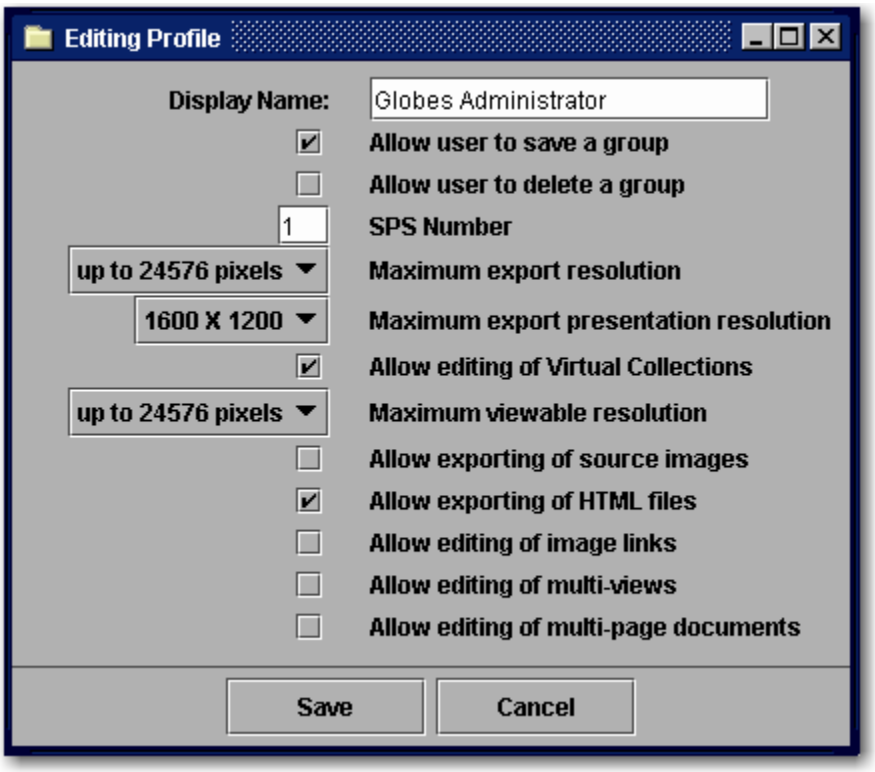
Once the Virtual Collection has been created, you will need to assign content to it, this content can only come from its Parent Collection. To do this you will first need to Grant User Privileges to the individual who will manage the content of the Virtual Collection.

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.



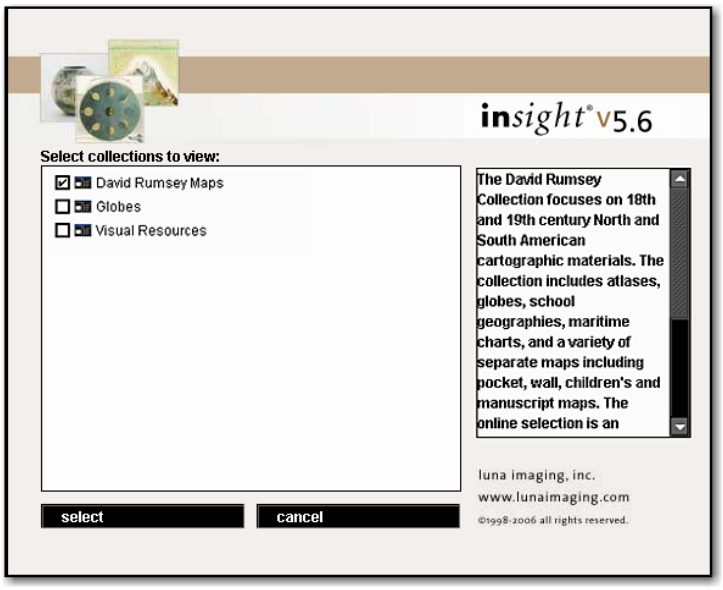
    b. Locate the Profiles.

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

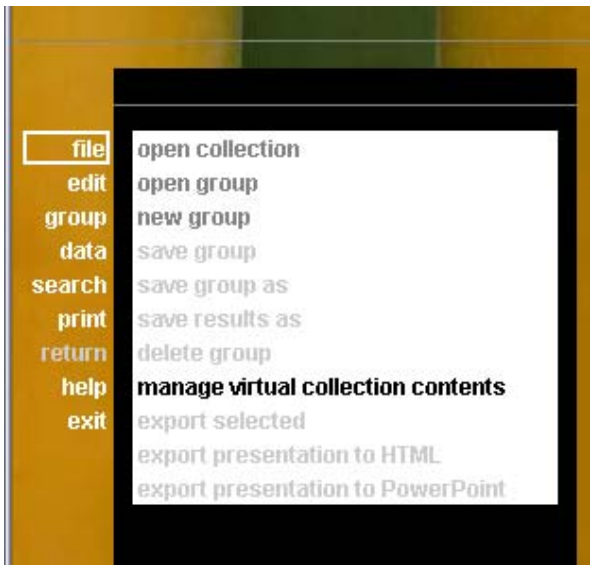


d. Check **Allow editing of Virtual Collections** and **Allow user to save a group** options.

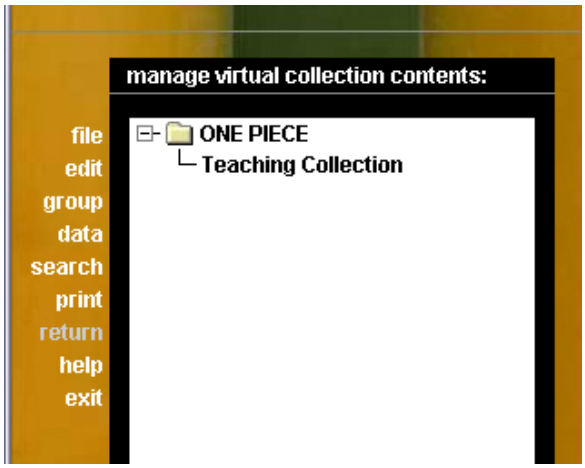
2) You are now ready to add the content to the new Virtual Collection using the Insight Java Client. Launch the Insight Java Client and select the Institutional Collection you are basing the Virtual Collection on.



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



4) Select the appropriate Virtual Collection group to edit.



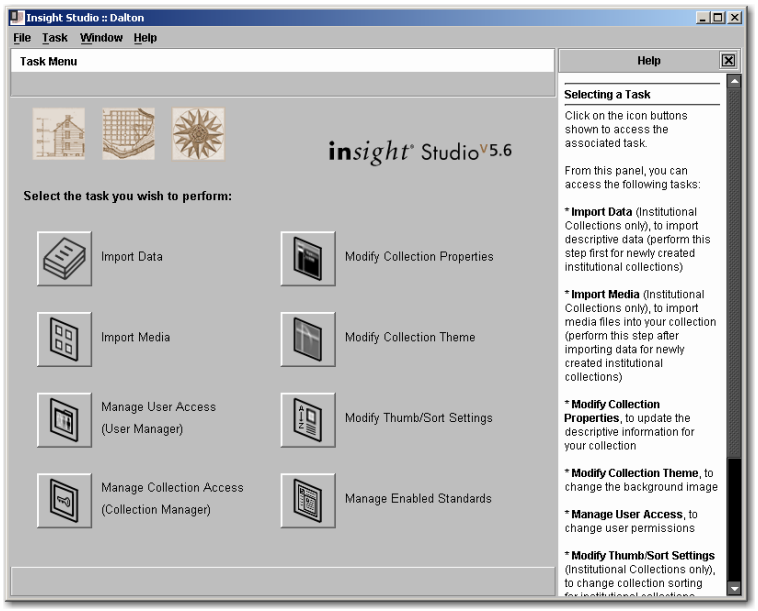
5) Once the Group opens, populate the Group with content from the Institutional Collection then save the group.

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.

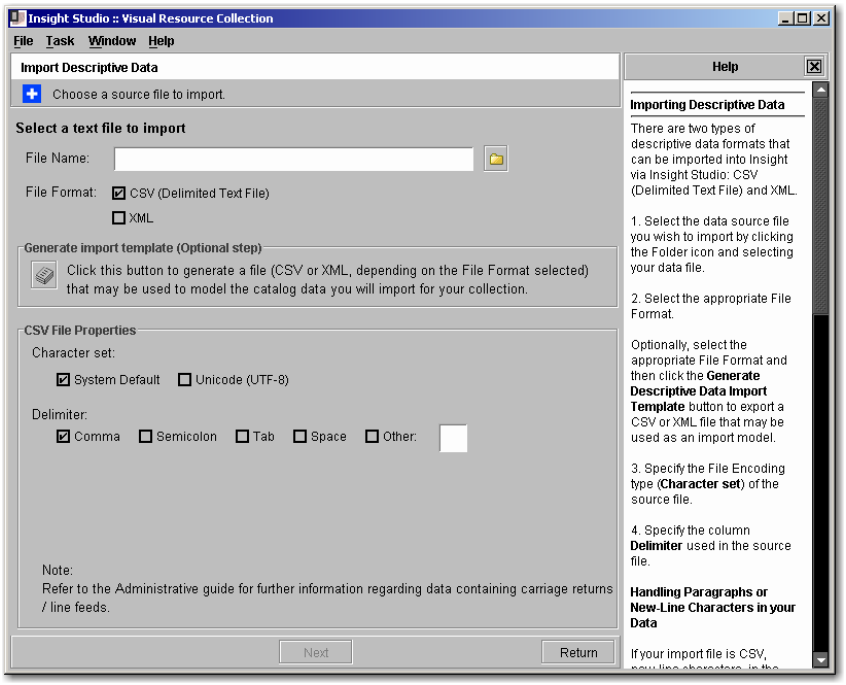
WORKFLOW #1: ADDING CONTENT WITH IMPORTED DATA

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.

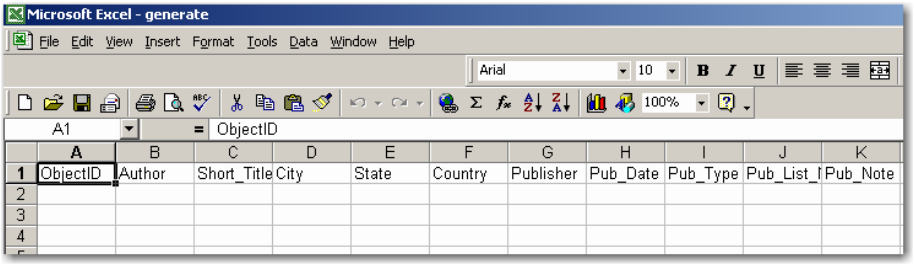
1. After publishing a new collection, click the **Import Data** button in the Task Menu to start importing catalog data for your collection.
2. In the Import Descriptive Data page, type the location of the existing data file on your file server in the **File Name** field or browse for the file by clicking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



Data that uses new-line characters, in the form of paragraphs or carriage-returns 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.

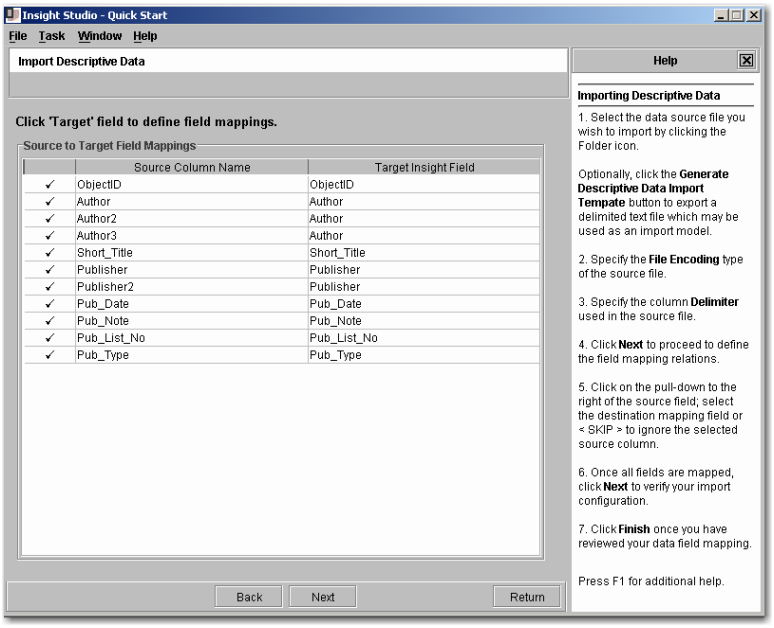
You can review your collection's catalog template structure before importing new data by clicking the button. You can also use this exported file as a model for the data to be imported into your collection. This ensures that your data import file correctly fits the structure of the catalog template you 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:



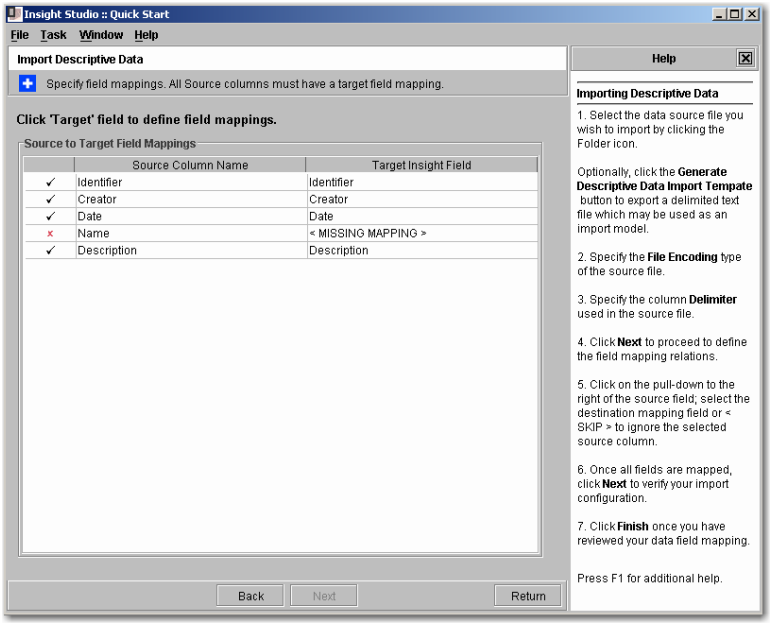
4. Click **Next**.
5. Review the automatic mappings generated between your data file and the catalog template you selected when creating your new collection. The field headers from

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).

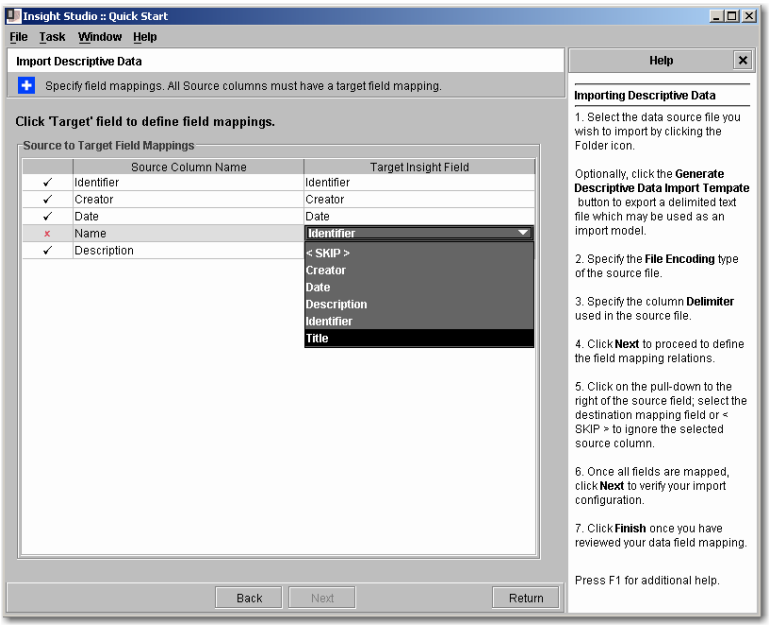


6. If a column header (or field title) in your data does not match a field in the catalog template you selected for your collection, you will see **<MISSING MAPPING>** in the **Target Insight Field** column for that field title.

   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:



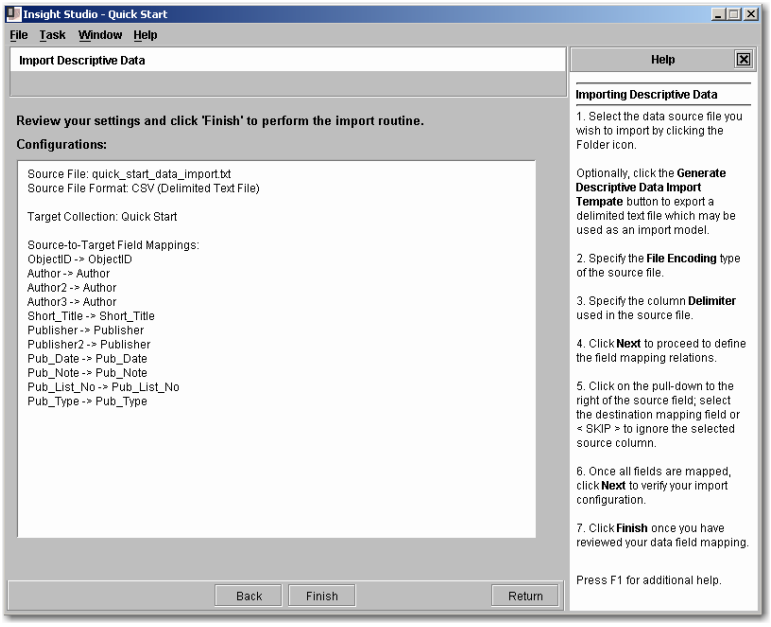
7. Click **<MISSING MAPPING>** where it appears in the Target Insight Field column to select the correct field name from the pull-down menu. The menu contains a list of fields in the catalog template used for your collection. Select the field most appropriate for the corresponding field of data in your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



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**.



Importing Media

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

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.

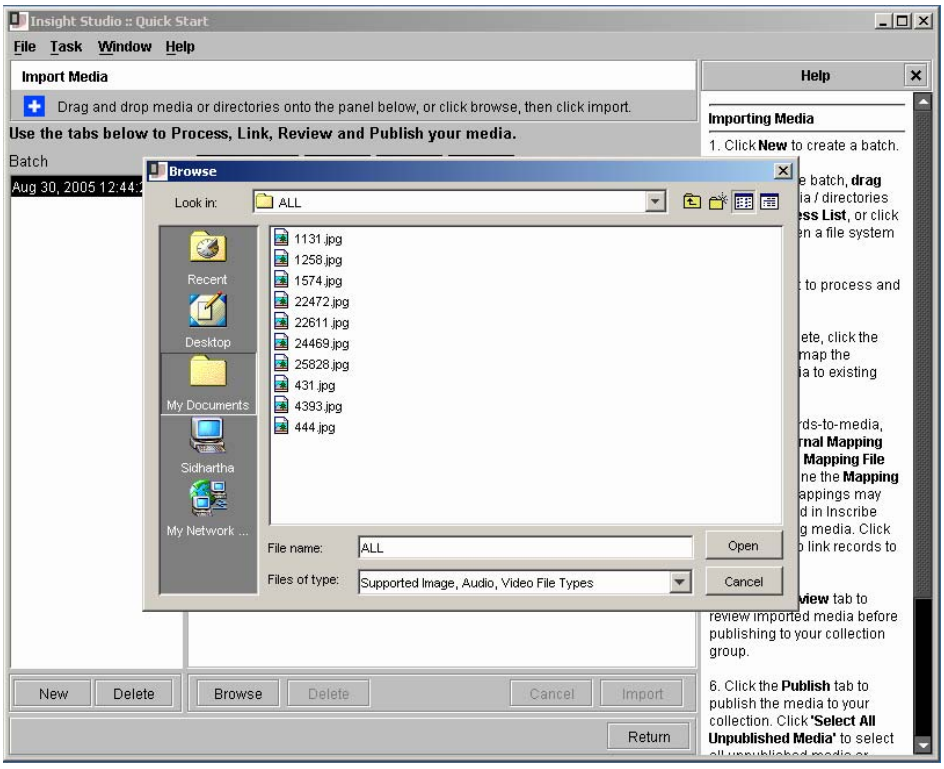
> Imported images can be deleted by entire batch, as well as individually, so importing your media in several batches is a good way to assure easier changes to your collection in the future.

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

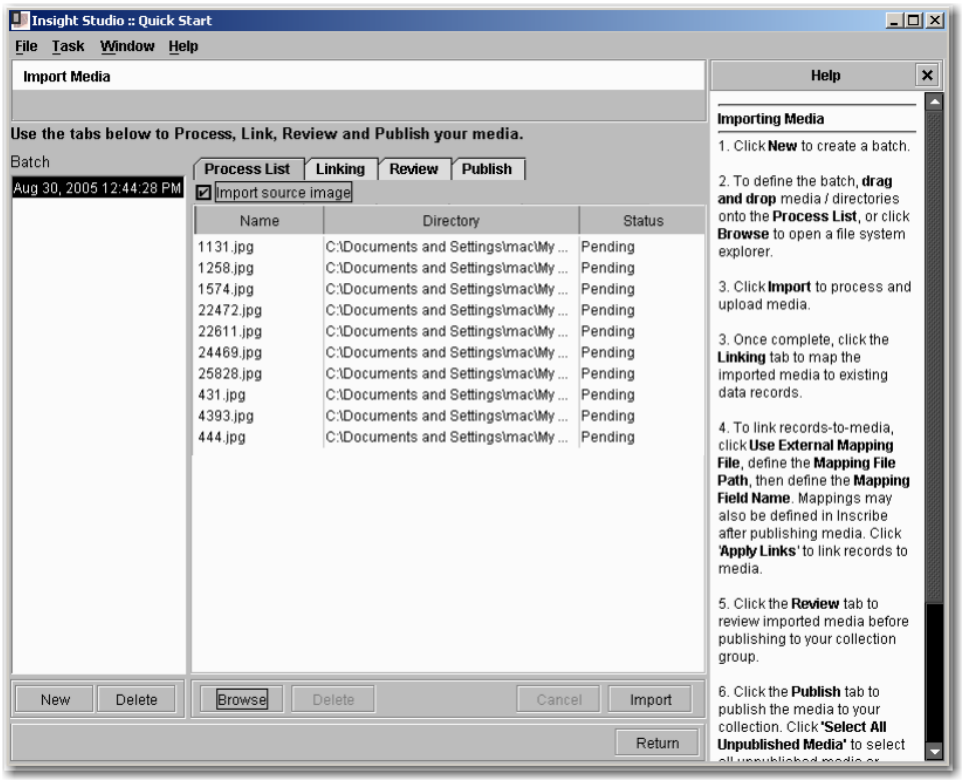
   a. You can drag files from where they are stored on your file system and drop them onto the Process List panel to the right of the Batch panel.

   --or--

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



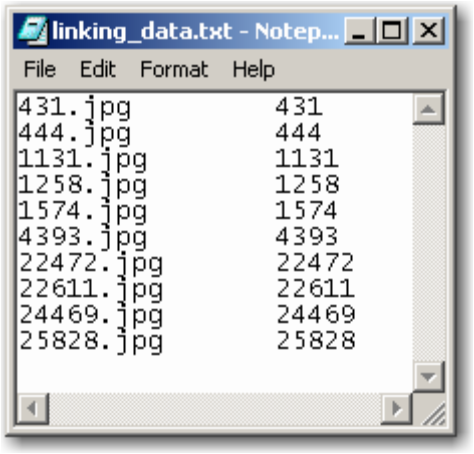
The Process List will show you the files you have selected for import.



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.

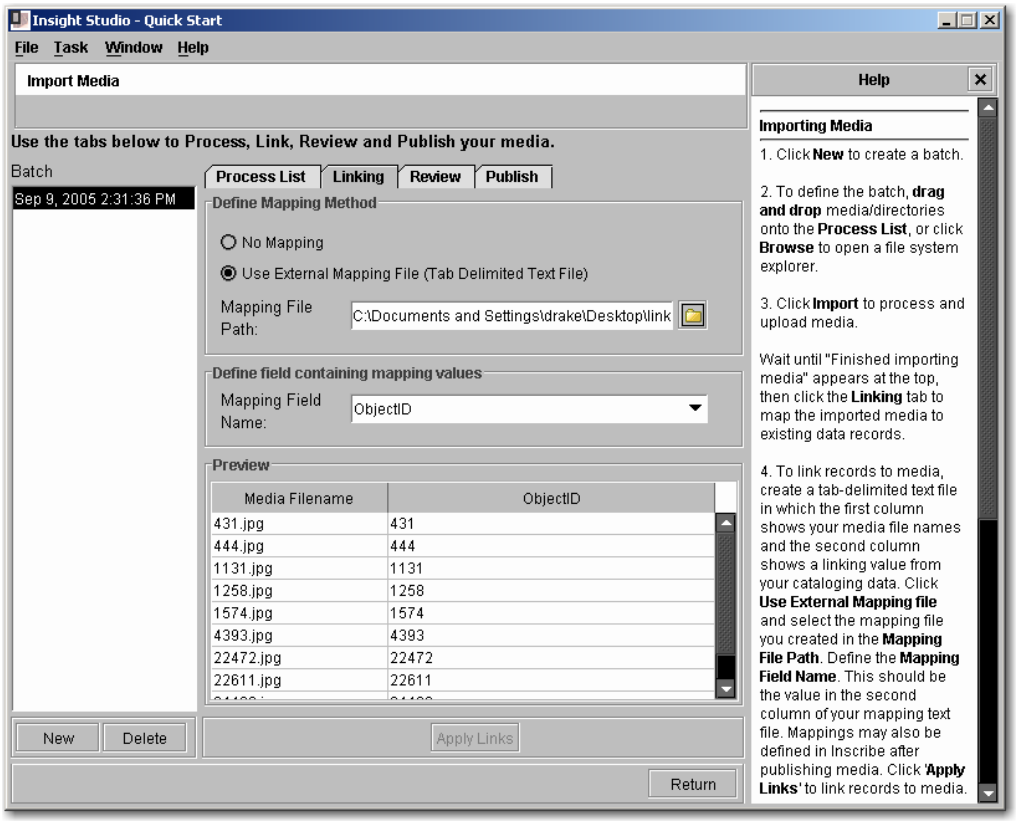
3. Once the Process List contains the files you wish to import, click **Import**. A status message will appear to indicate Pending, Processing, Uploading, or Complete for each file. When the entire batch has been processed completely **Finished Importing Media** will appear at the top.
4. After importing 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".



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.



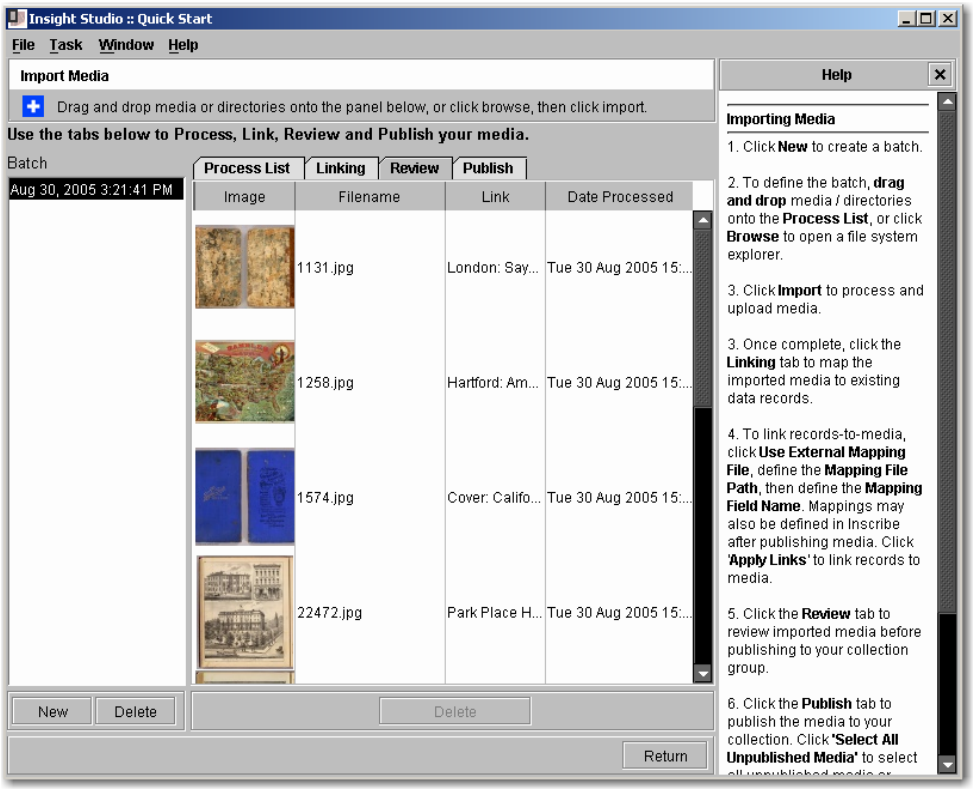
There are two reasons why a preview might not appear:

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 upper-case 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).

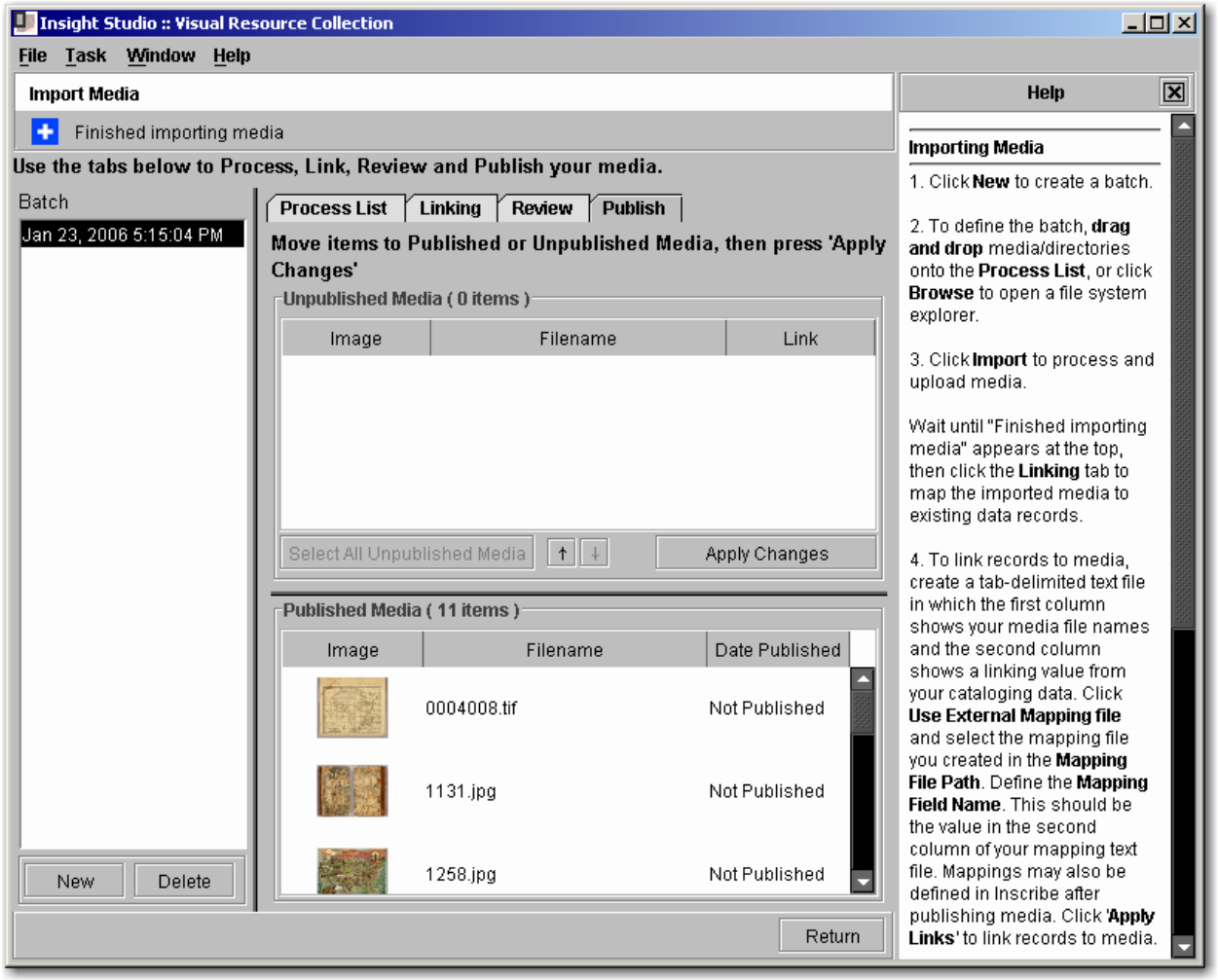
8. Click **Apply Links**.
9. Click the **Review** tab to review thumbnails of your imported images and the links to imported data.



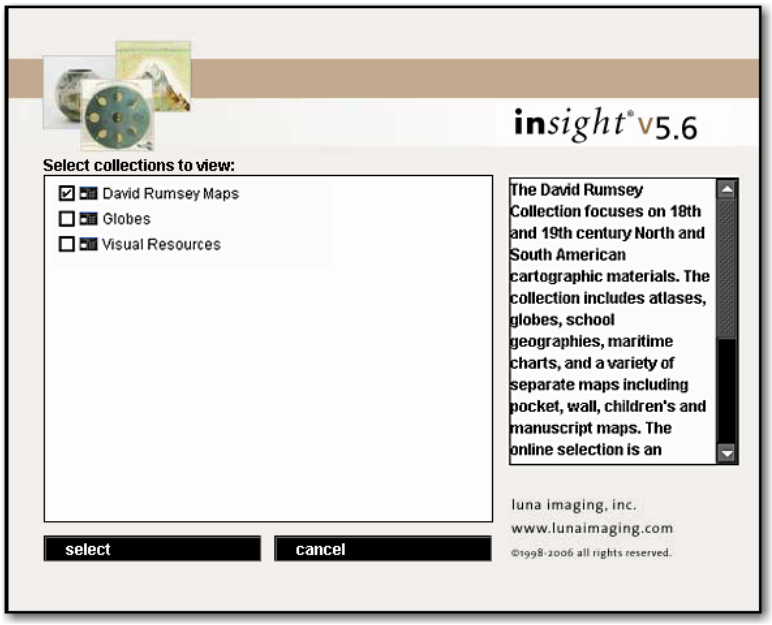
10. Check for any missing links before proceeding.

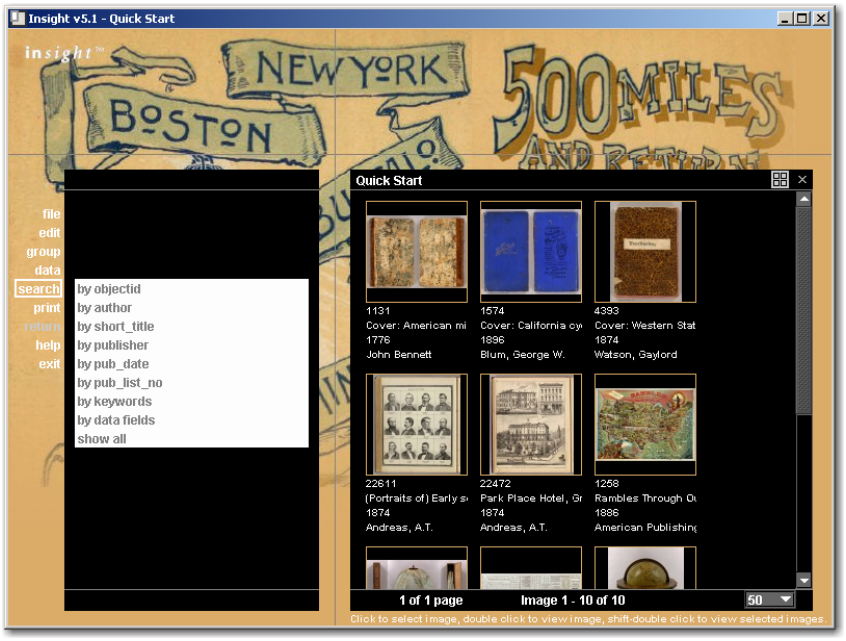
> Other inconsistencies that may later affect successful linking include an incorrect mapping field name selected in the **Define field containing mapping values** section or an inconsistency between the linking value in your mapping file and the corresponding data in your imported data file.

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.



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.

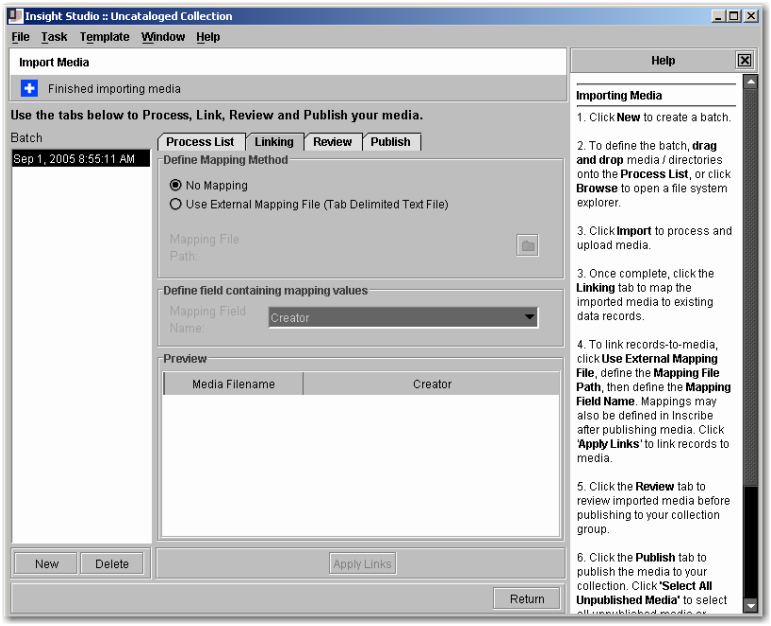
1. Click **New** to create a new batch. A batch represents a group of media items imported at the same time. The batch in the left panel will show the date and time it was created. If you do not create a new batch, a batch will be automatically generated whenever you add content to the Process List.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

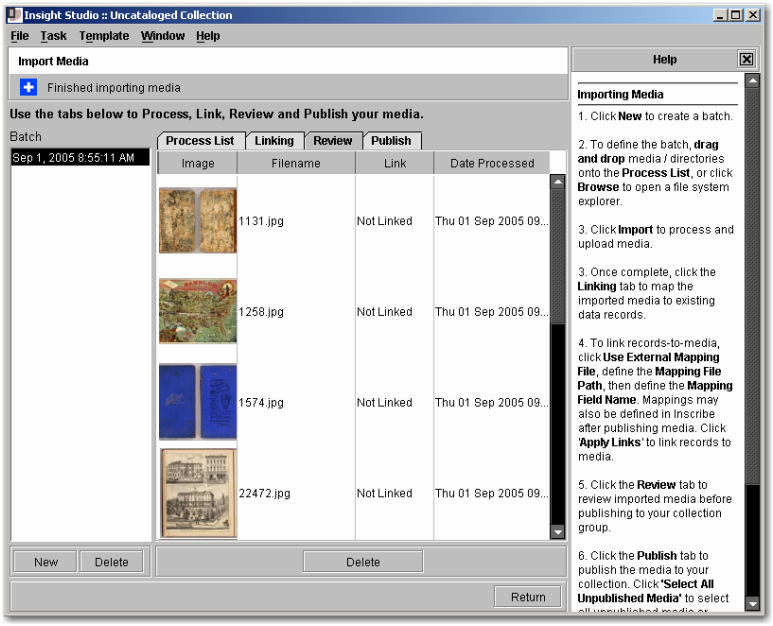
b. You can find the media files you want by clicking **Browse** and importing them from your file system to the Process List.

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).

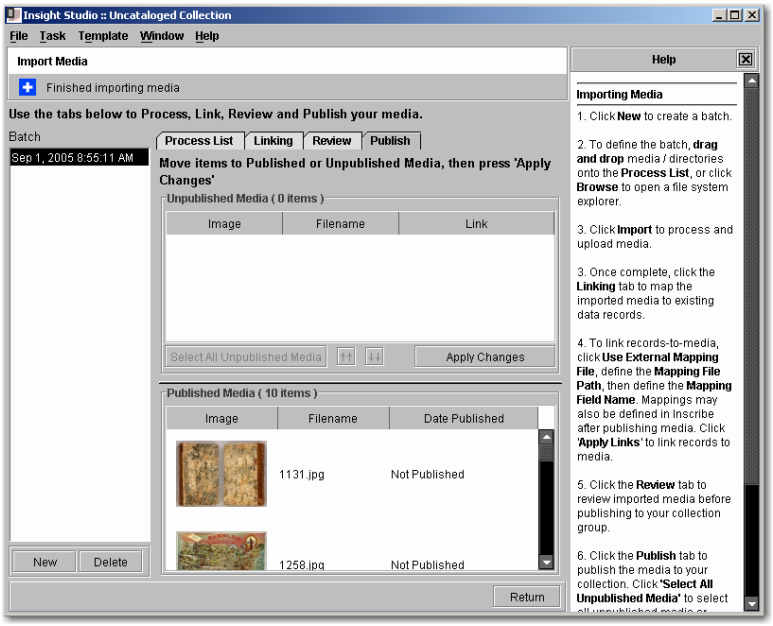


5. Click the **Review** tab to see thumbnails of your imported media. You will see that the images are categorized as **Not Linked**.



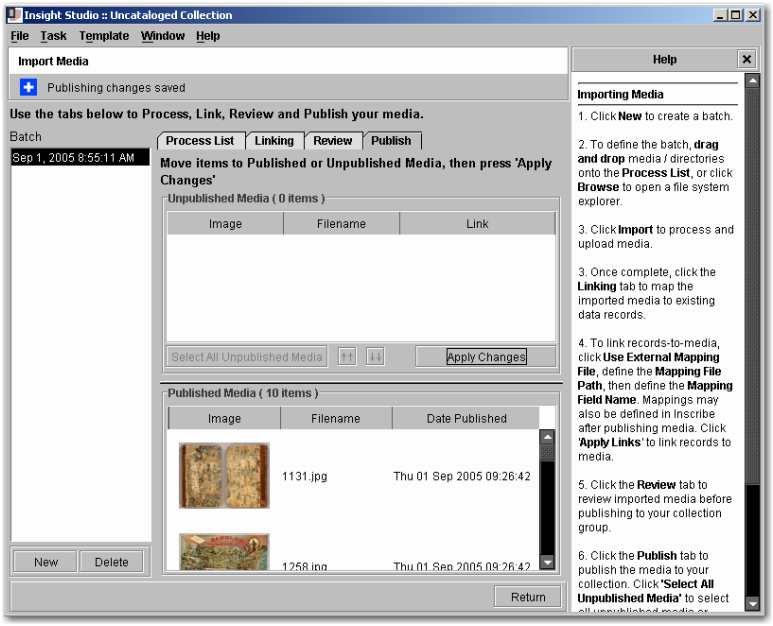
6. Click the **Publish** tab.

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 button.



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.



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

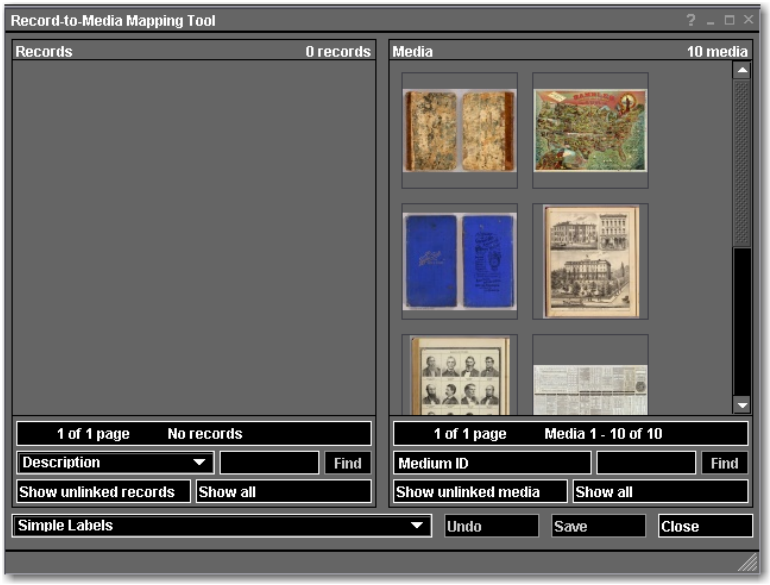
You can provide descriptive data for your media by individually cataloging records using Inscribe.

Cataloging Records by Hand

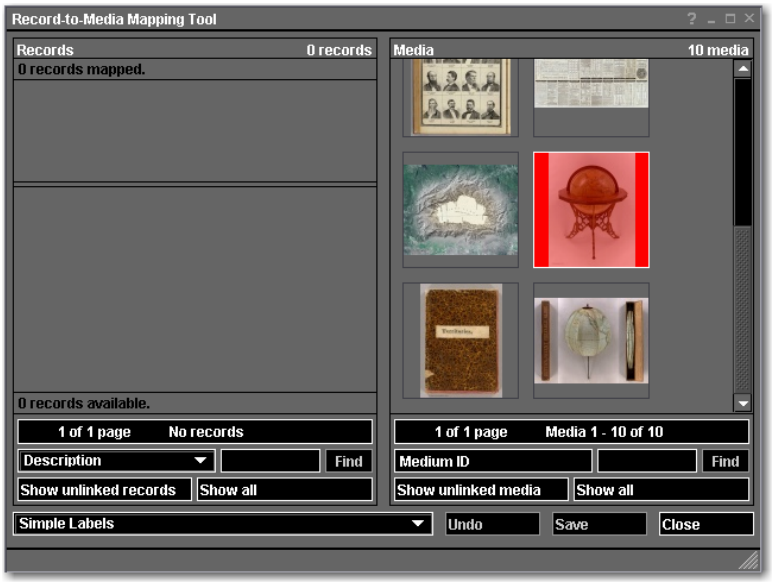
1. Log on to Inscribe. Select the collection you will edit.

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.

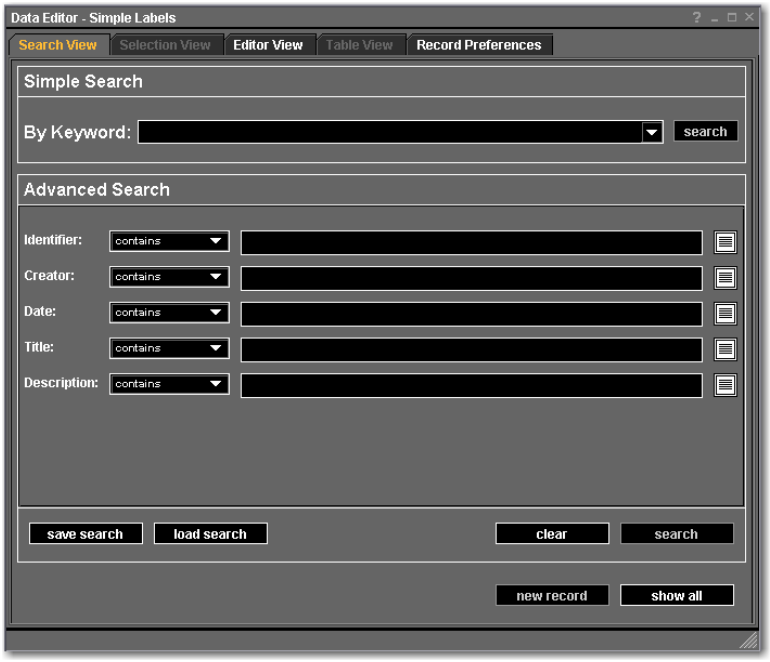


4. Select an image by clicking on it once. It will become highlighted in red.



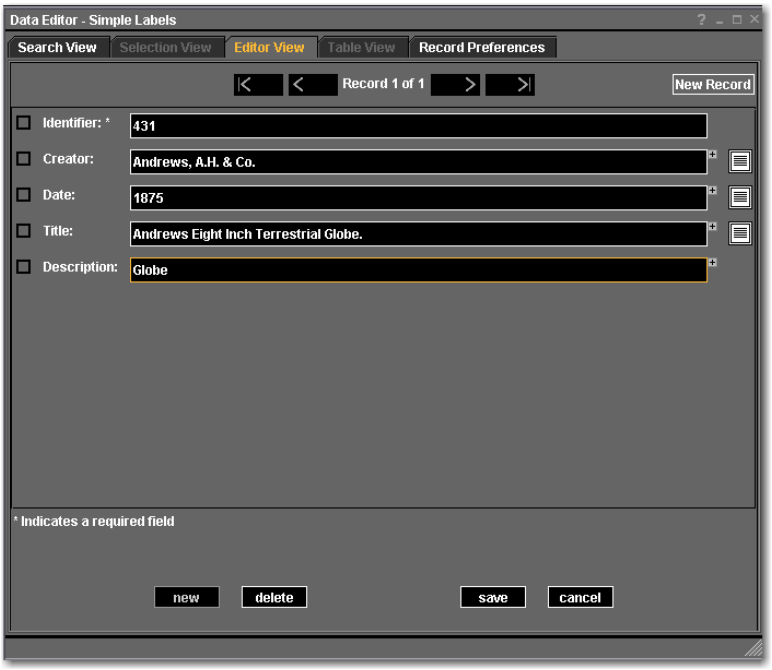
Optionally, double-click on a thumbnail image to open a reference of that image. You may drag this image anywhere on the screen while you catalog its corresponding data and reference either the image itself or its small thumbnail in the image tool bar.

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).



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.



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

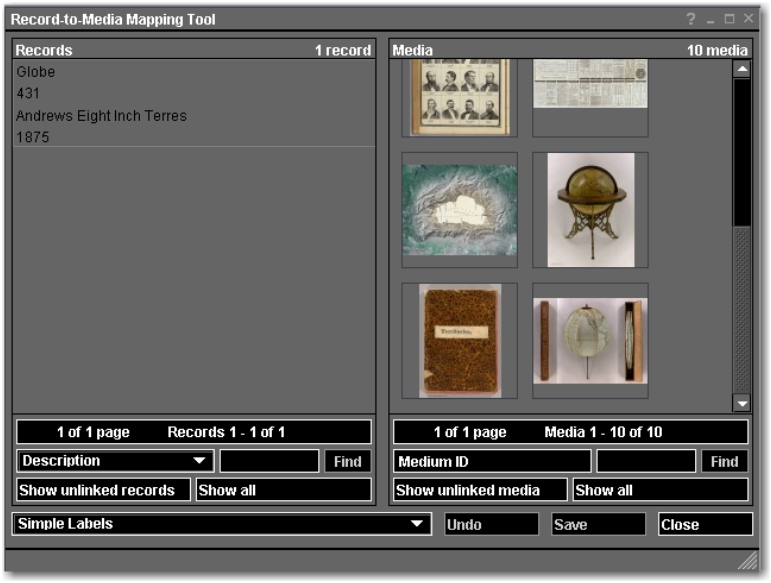
Mapping Data to Media with Inscribe

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.

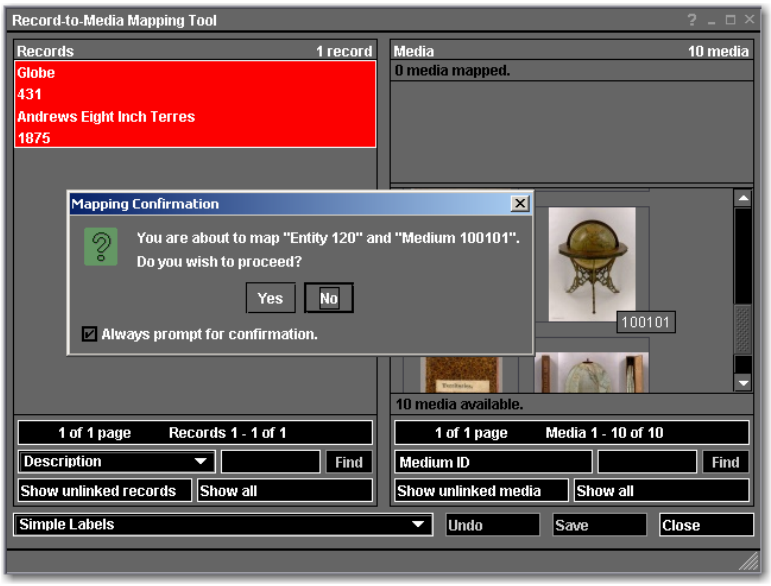
> The following steps can also be used if you import media and data using Insight Studio but do not apply links in the Linking tab of the Import Media process.

1. In Inscribe, open or return to the Record-to-Media Mapping window.

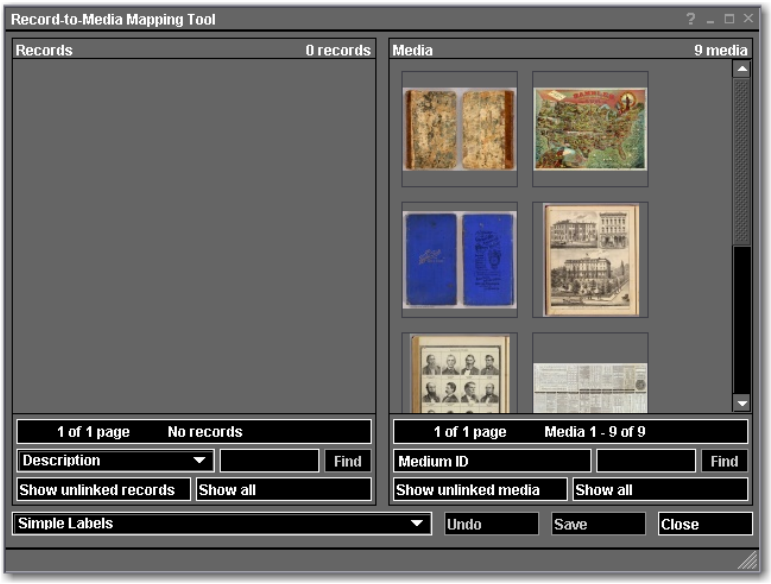
2. Click **Show unlinked records** in the Records panel on the left. You should see any data records created in Inscribe that have not been mapped to media and any data records that were imported using Insight Studio that were not mapped to media.



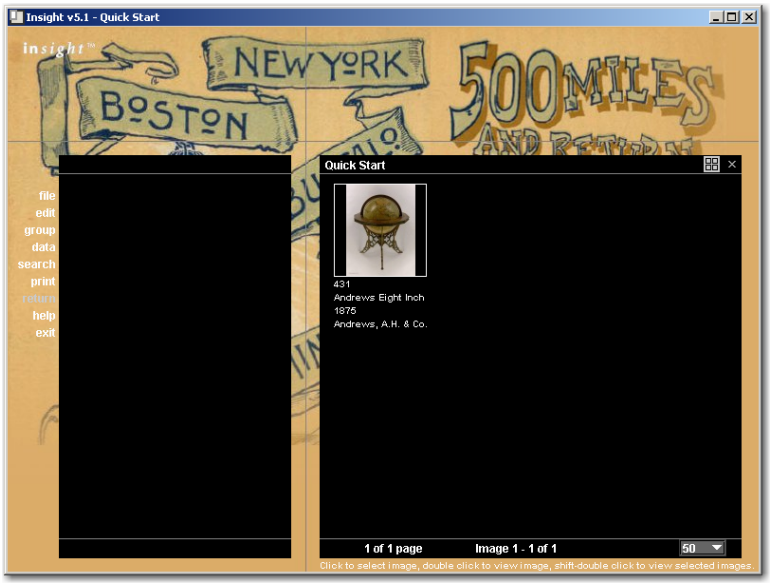
3. Click the data record you would like to map (it will become highlighted in red) and then click the corresponding image you would like to link it to. You will receive a confirmation message.



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.



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

Access.....7, 8, 9, 10, 11, 12, 13, 14, 15, 17, 19, 20, 21
Adding a User Group.....13, 14
Administrative User.....9
Administrator Tools.....21, 50
Authentication.....9, 22

C

Cataloging Records.....66
Cataloging Template.....23, 26, 33, 40, 42, 48
Code Key.....11
Collection.....50
Collection Manager 5, 7, 8, 9, 11, 13, 16, 18, 20, 26, 30, 33, 40, 42, 45, 48, 50, 53
Controlled Vocabularies.....24

D

Date.....23, 37, 40
Delete.....8, 10, 15, 16, 20, 25, 41, 47, 59
delete collection.....8, 10
Delimiter.....36, 54
Dependent.....24, 33

E

Export.....15, 17, 25

F

Field Groups.....23, 27, 33, 35, 40, 41
Fields.....23, 29, 34, 40, 41
Fuzzy Date.....37

G

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

I

Importing.....54, 58, 59, 63, 64
Importing Data.....54, 63
Importing Media.....58, 59, 63, 64
Independent.....23, 24
Index.....73
Inscribe... 2, 5, 14, 16, 18, 23, 24, 37, 39, 40, 45, 48, 63, 65, 66, 67, 69, 70, 71
Insight Administrator Tools.....7, 8, 9, 16, 18, 21, 47, 50
Insight Shares.....19
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 Access.....7, 9, 10
Institutional Collections.....42

J

Java.....5, 16, 17, 48, 51
Java Client.....5, 16, 17, 48, 51
JPEG2000.....5, 6

L

Linking.....59, 63, 64, 69
Log.....11, 12, 14, 66
Long Text.....23, 37, 38

M

Managing Users 7, 11
Mapping 60, 64, 66, 67, 69
Media 2, 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
Numeric 23, 37, 39

O

ObjectID 40, 59
Order 29, 40, 41

P

Permissions 18
Personal Insight 5
Presentation 15
Profiles 16, 50

S

Shares 19
Short Text 23, 37, 38
Sort 29, 40, 41
SPS 17

T

Template 23, 25, 26, 27, 28, 30, 33, 40, 42, 48
Theme 44
Thumbnail 41

U

URL 17, 25, 27, 33
User Group 11, 12, 13, 14, 20
User Groups 13, 14
User Manager 5, 8, 9, 11, 13, 20, 21

V

Virtual Collection 17, 42, 47, 48, 50, 51, 52
Vocabularies 24, 33

X

XML 6, 25
XML Gateway 6